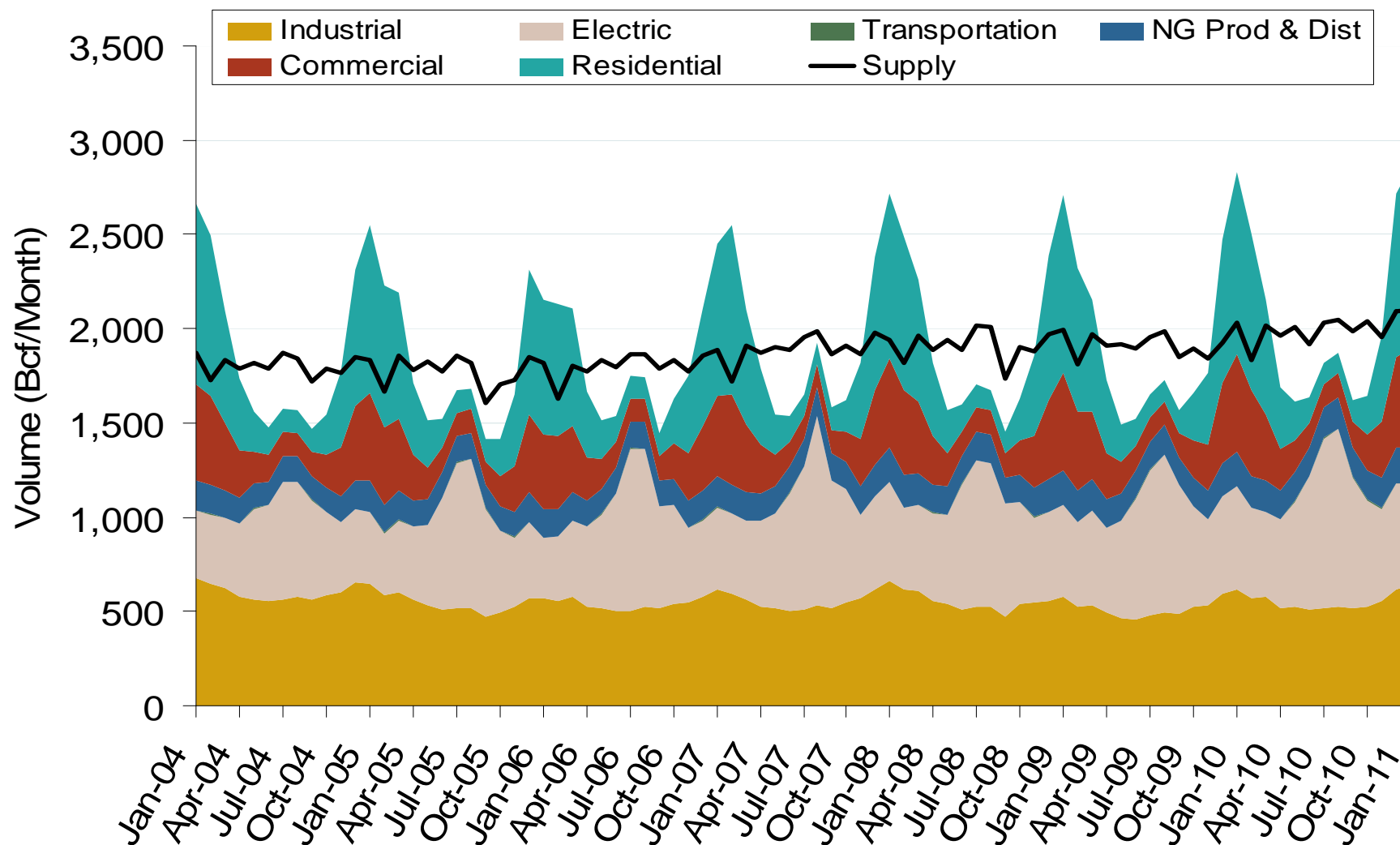


## Natural Gas Market National Overview



## Annual U.S. Natural Gas Consumption by Sector



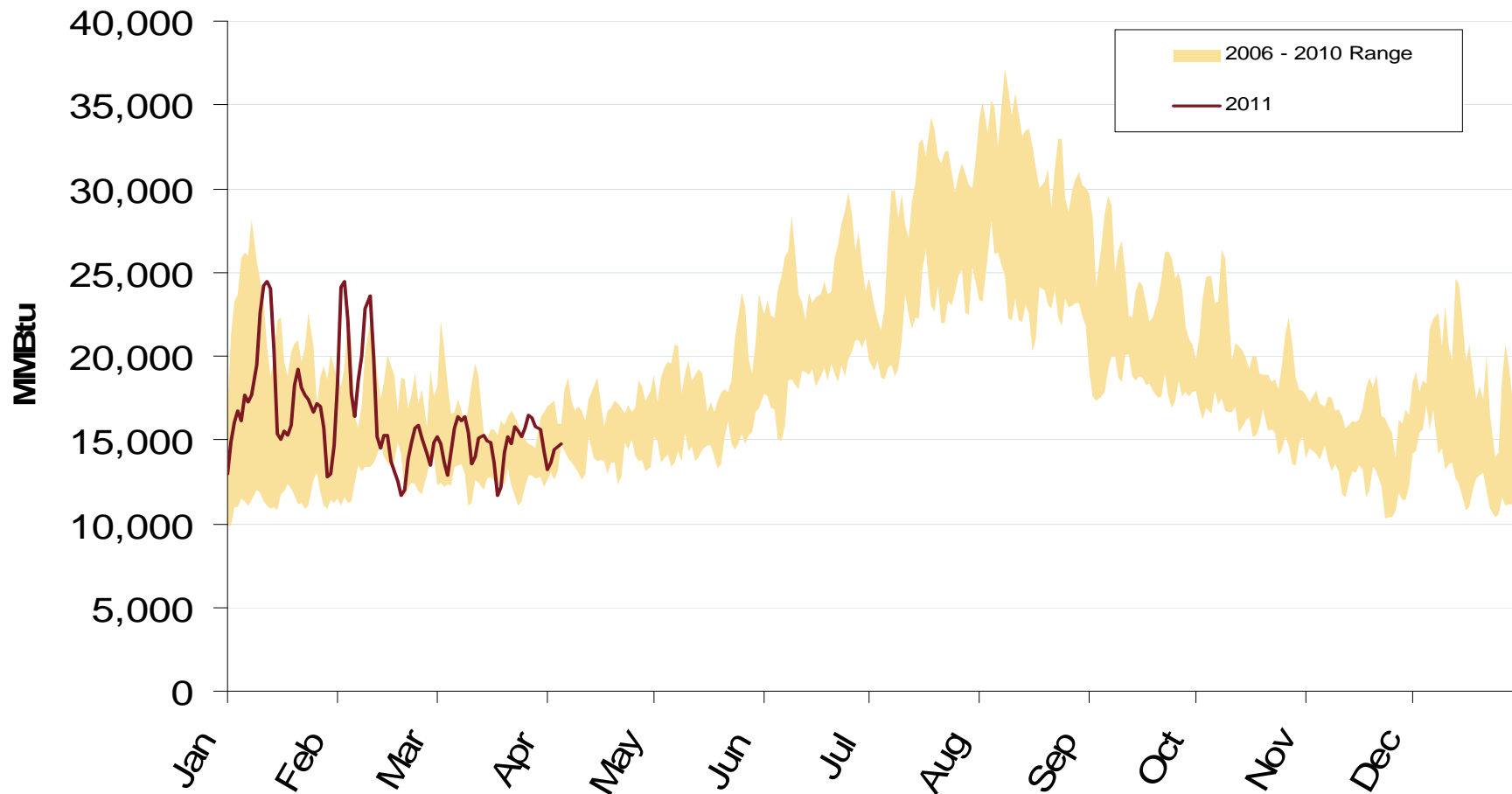
Note: Supply includes lower 48 state production, net pipeline imports, and LNG imports.

Source: Derived from EIA data

April 2011

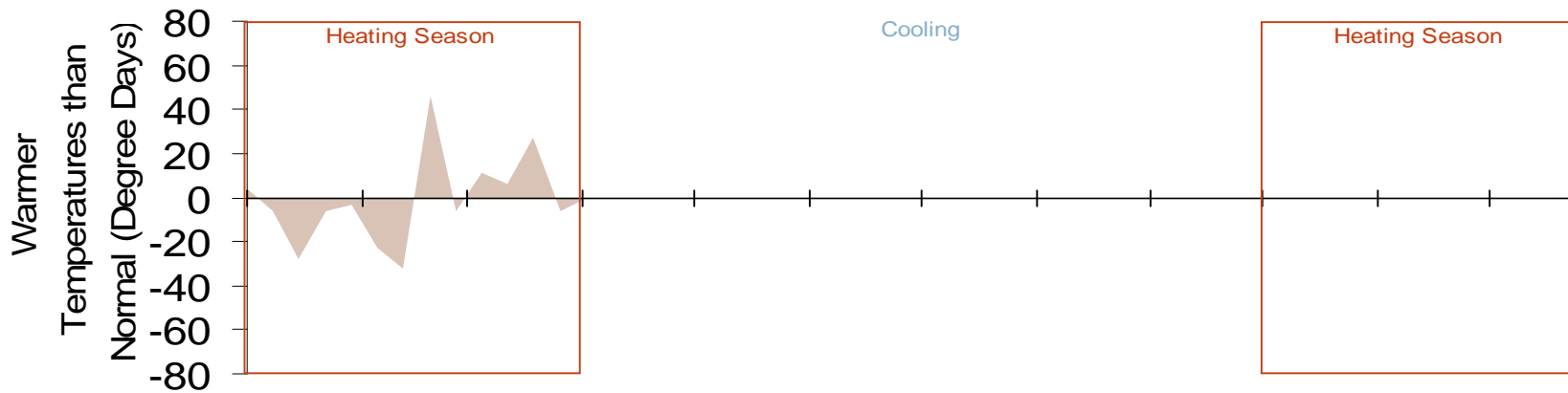
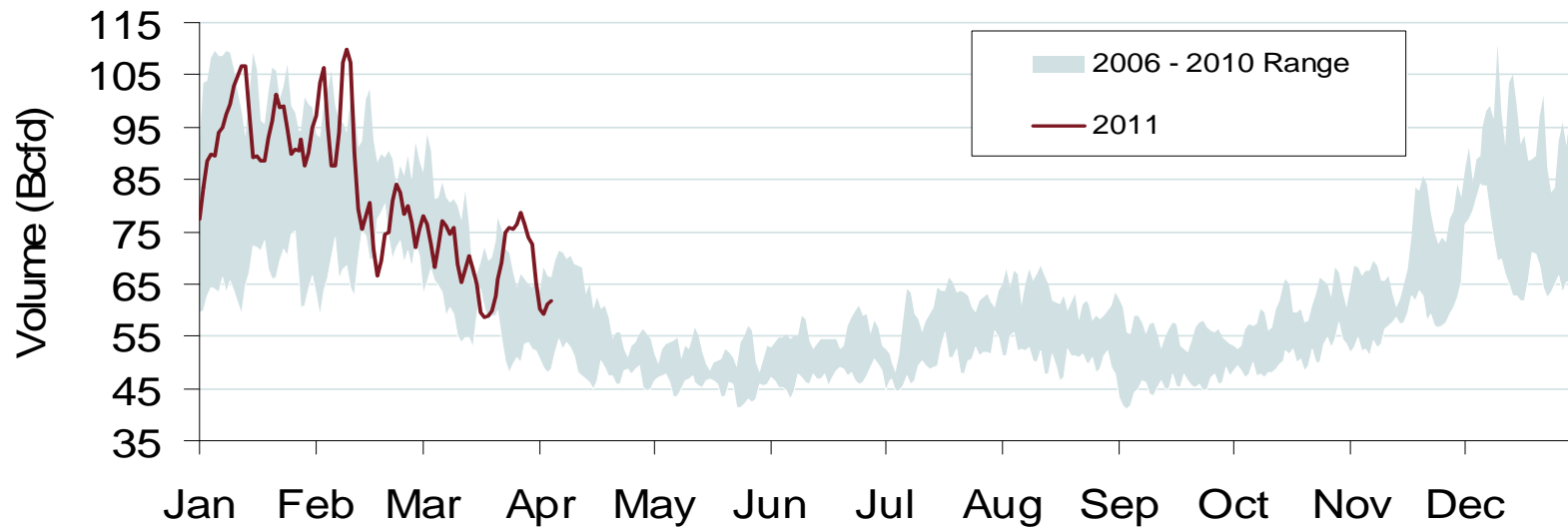
Updated April 8, 2011

# U.S. Natural Gas Consumption for Power Generation



Source: Derived from *Bentek Energy* data.

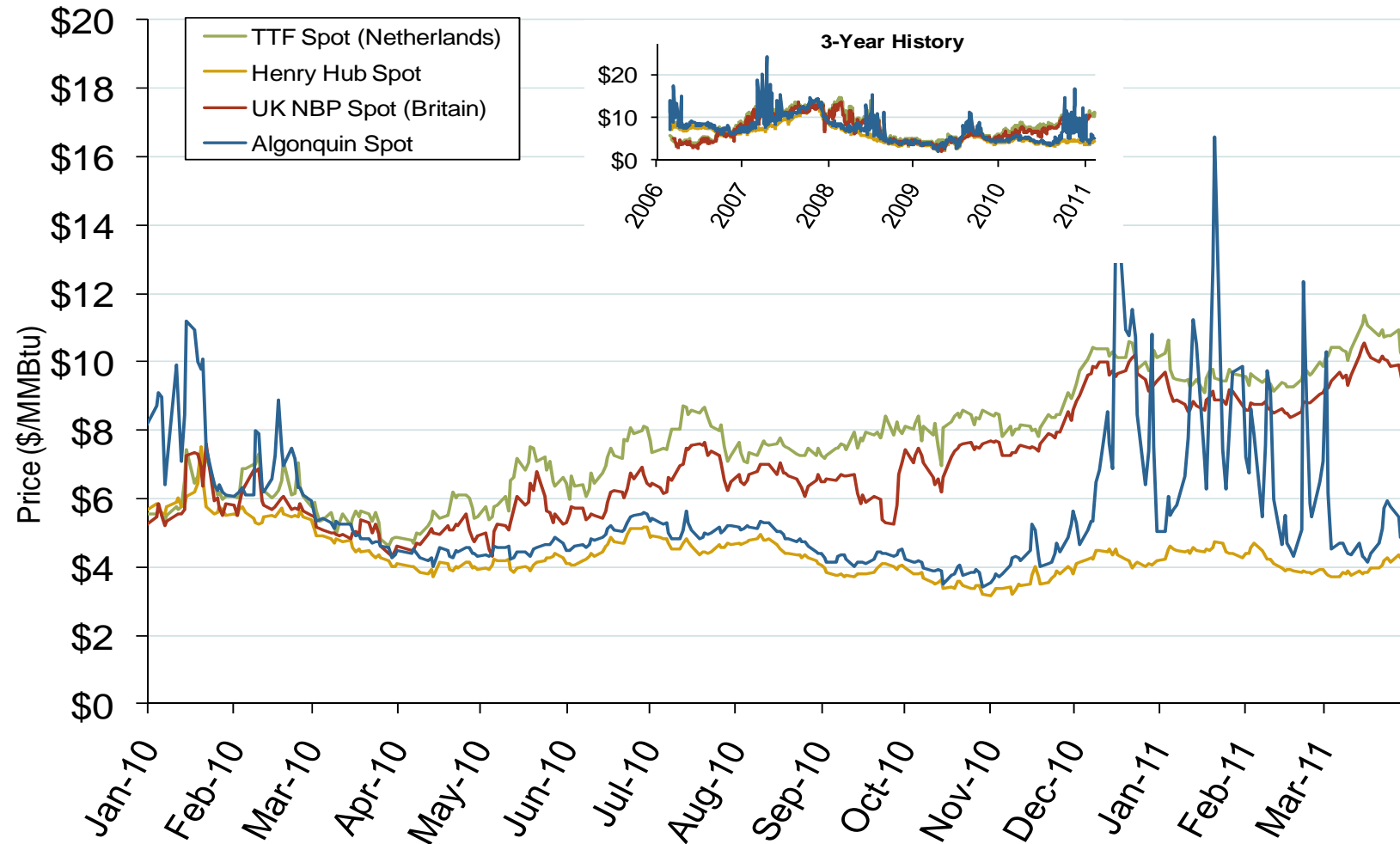
# Total U.S. Natural Gas Demand (All Sectors) and Temperatures



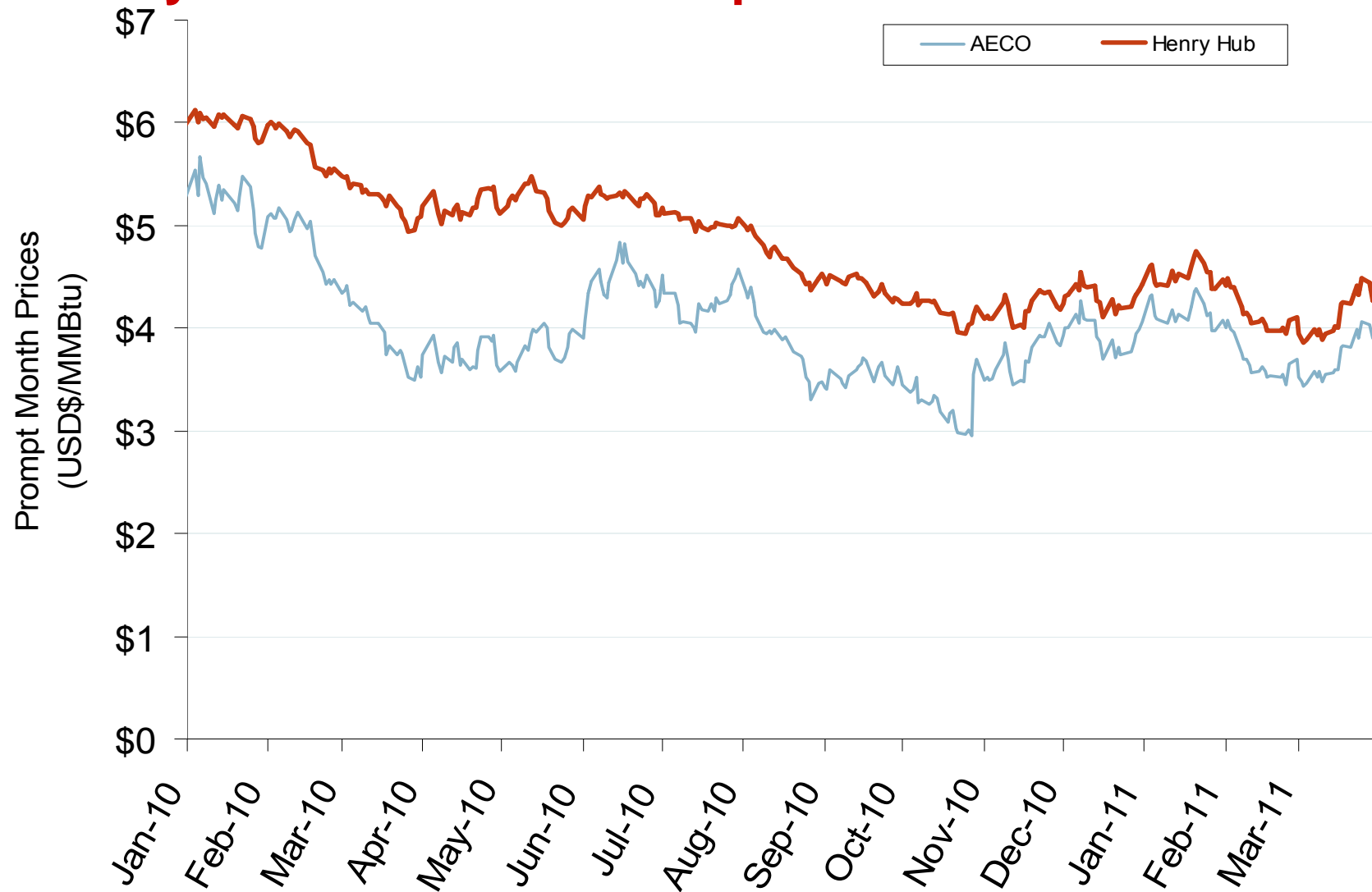
Source: Derived from *Bentek Energy* and *Weekly NOAA* data.

Updated April 8, 2011

## Atlantic Basin European and US Spot Natural Gas Prices



## Henry Hub and AECO Prompt-Month Futures Prices



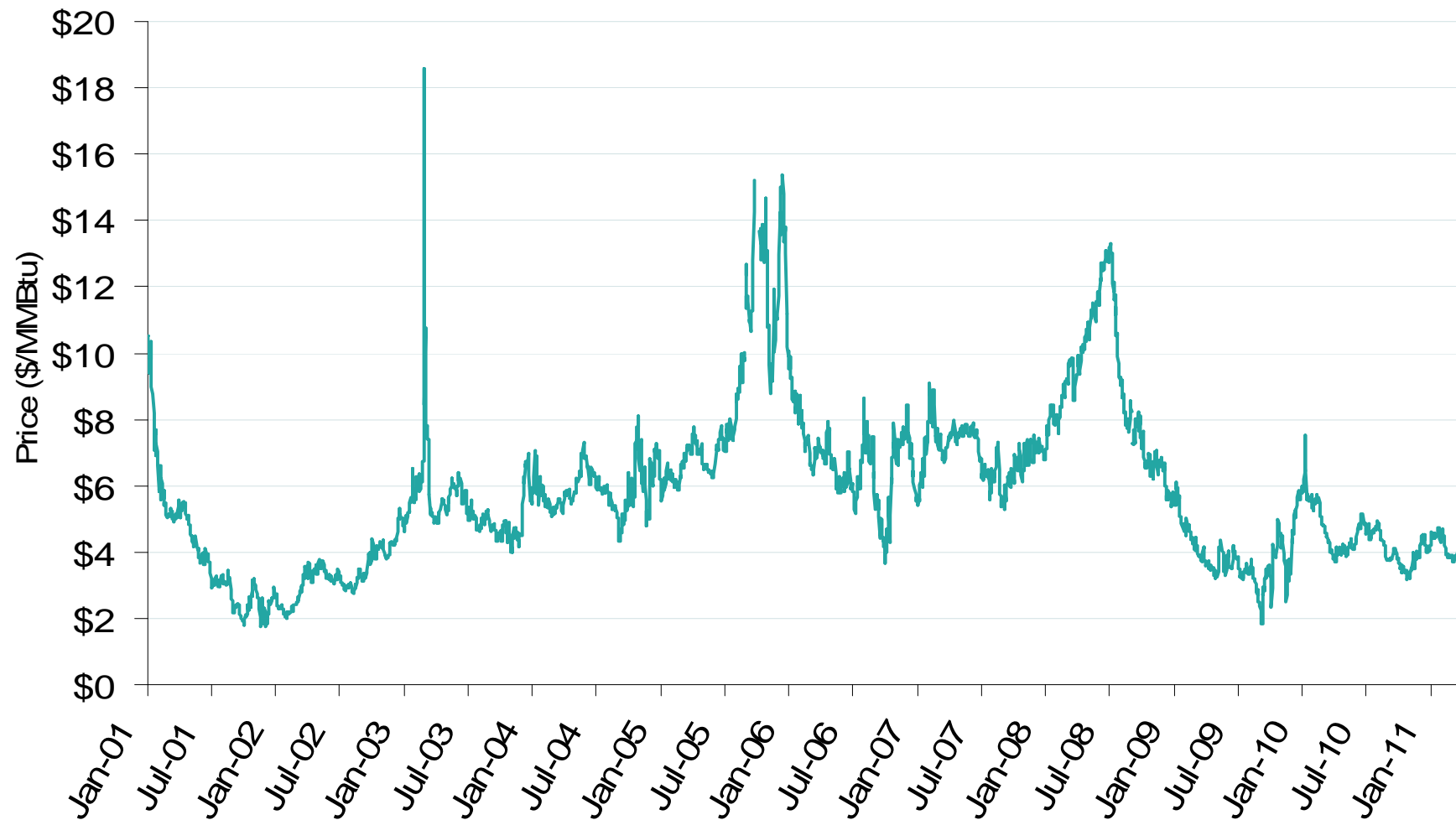
Source: Derived from ICE data.

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## Natural Gas Market Overview: Henry Hub Spot Prices

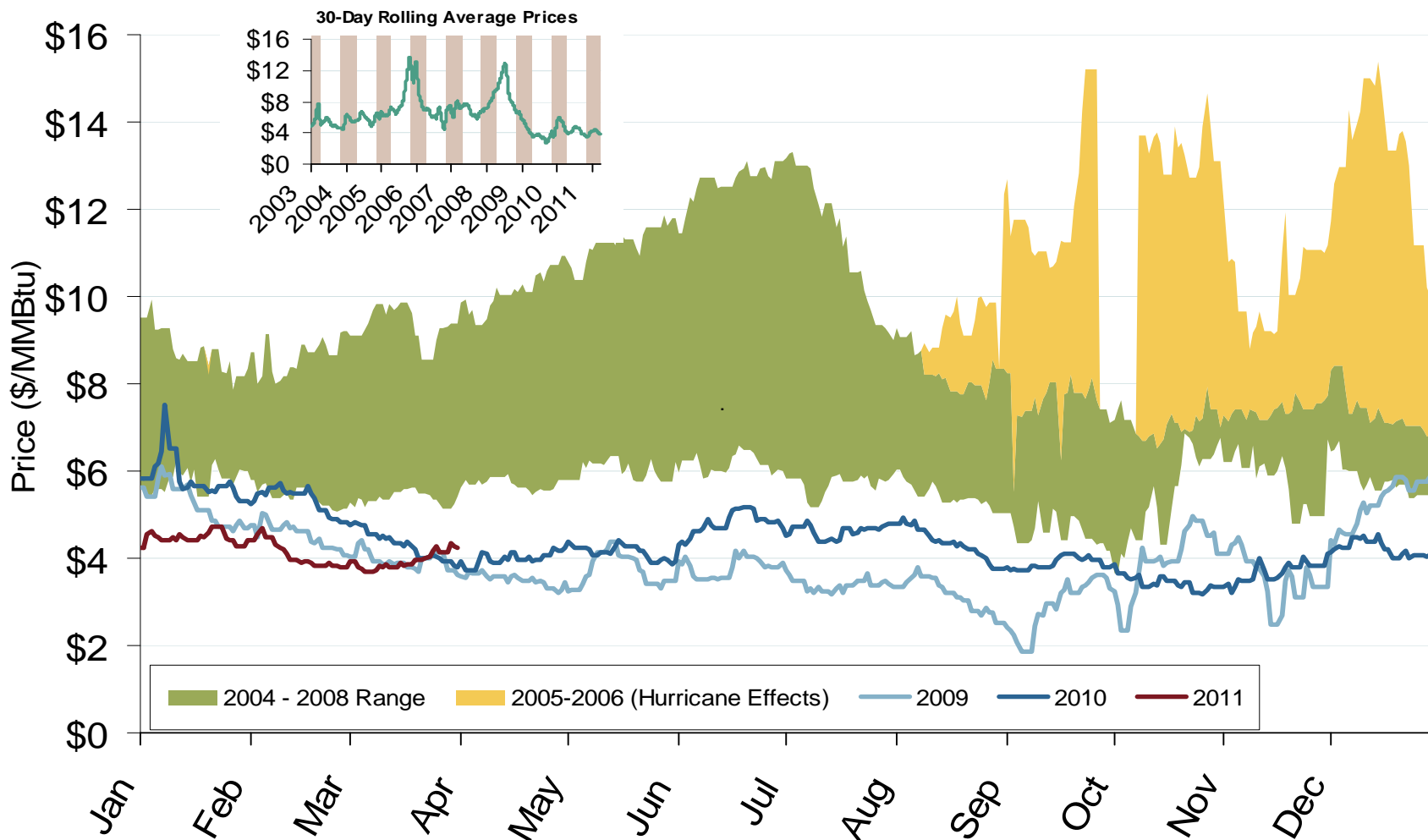
Federal Energy Regulatory Commission • Market Oversight • [www.ferc.gov/oversight](http://www.ferc.gov/oversight)**Henry Hub Natural Gas Daily Spot Prices, 2001-2011**

Source: Derived from Platts data.

Natural Gas Market Overview: 5 Year Range of Henry Hub Spot Prices

Federal Energy Regulatory Commission • Market Oversight • [www.ferc.gov/oversight](http://www.ferc.gov/oversight)

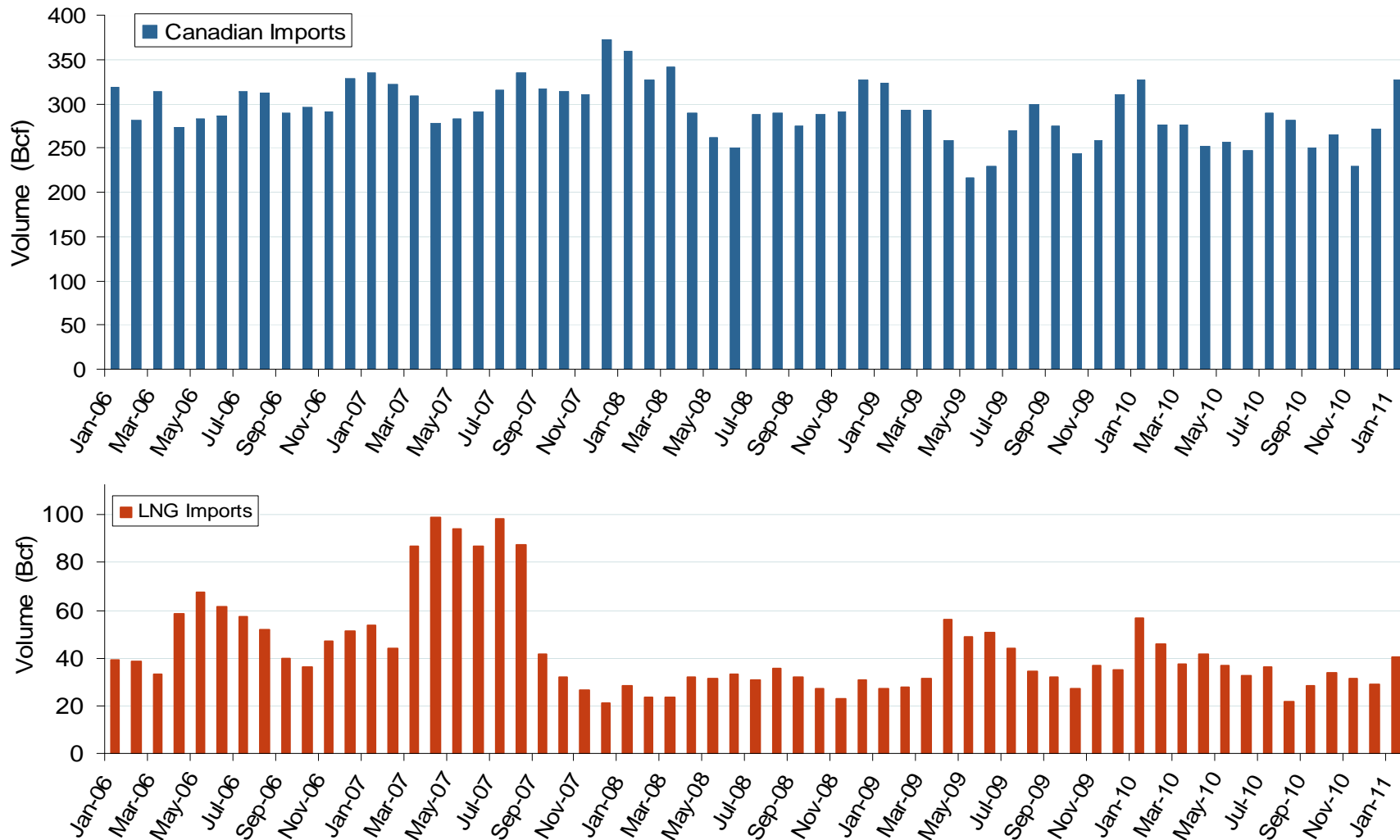
# Henry Hub Natural Gas Daily Spot Prices



Source: Derived from *Platts* data.



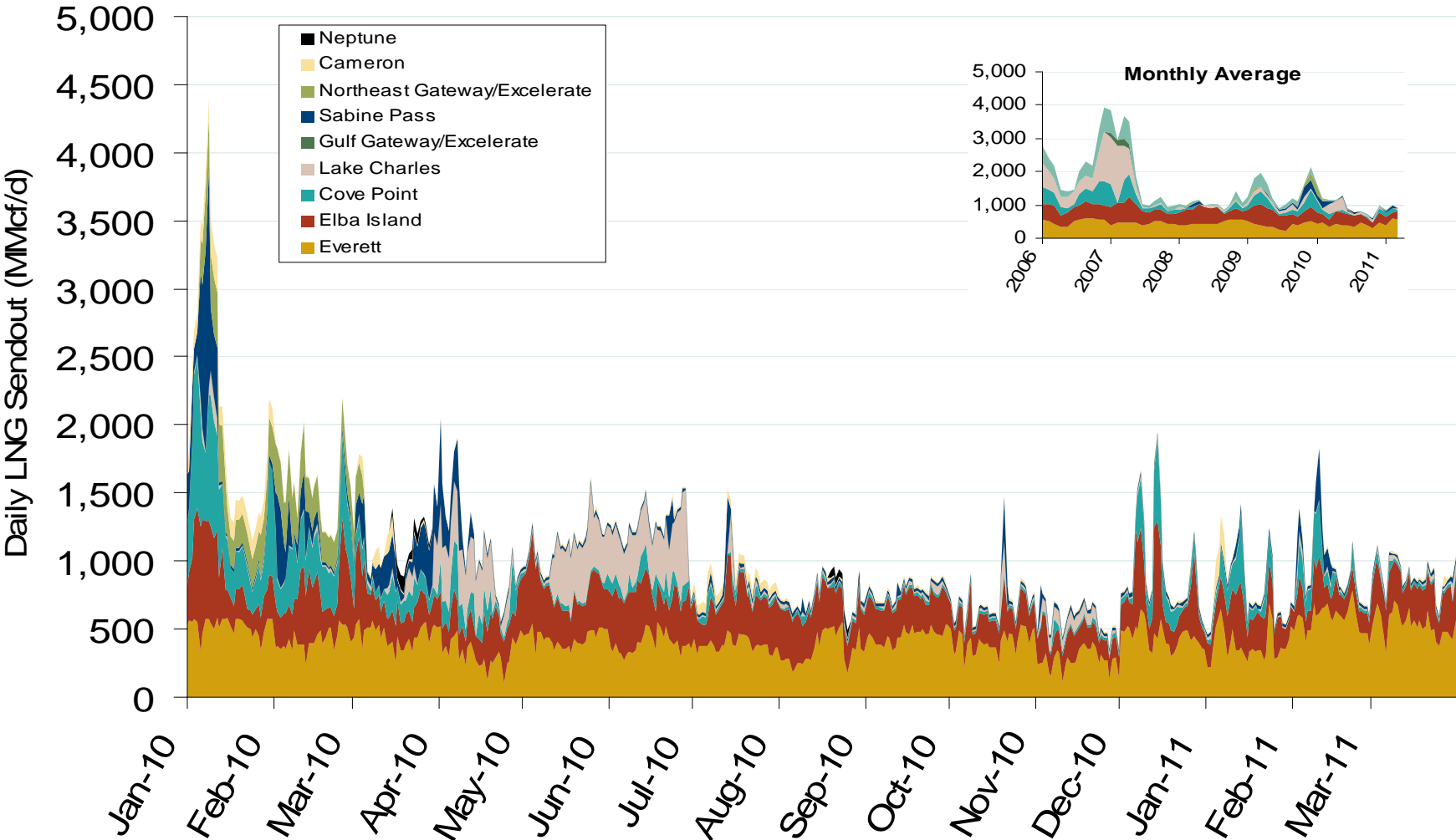
# Canadian and LNG Natural Gas Imports Into the U.S.



Source: Derived from EIA Natural Gas Monthly data.  
April 2011

Updated April 8, 2011

# Daily Gas Sendout from Existing LNG Facilities\*



Source: Derived from Bentek data.

\* Everett data includes flows onto the AGT and TGP interstate lines, plus estimates of flows to the Mystic 7 power plant, Keyspan Boston Gas, and LNG trucked out of the terminal. Excludes Freeport LNG which flows via intrastate pipelines.

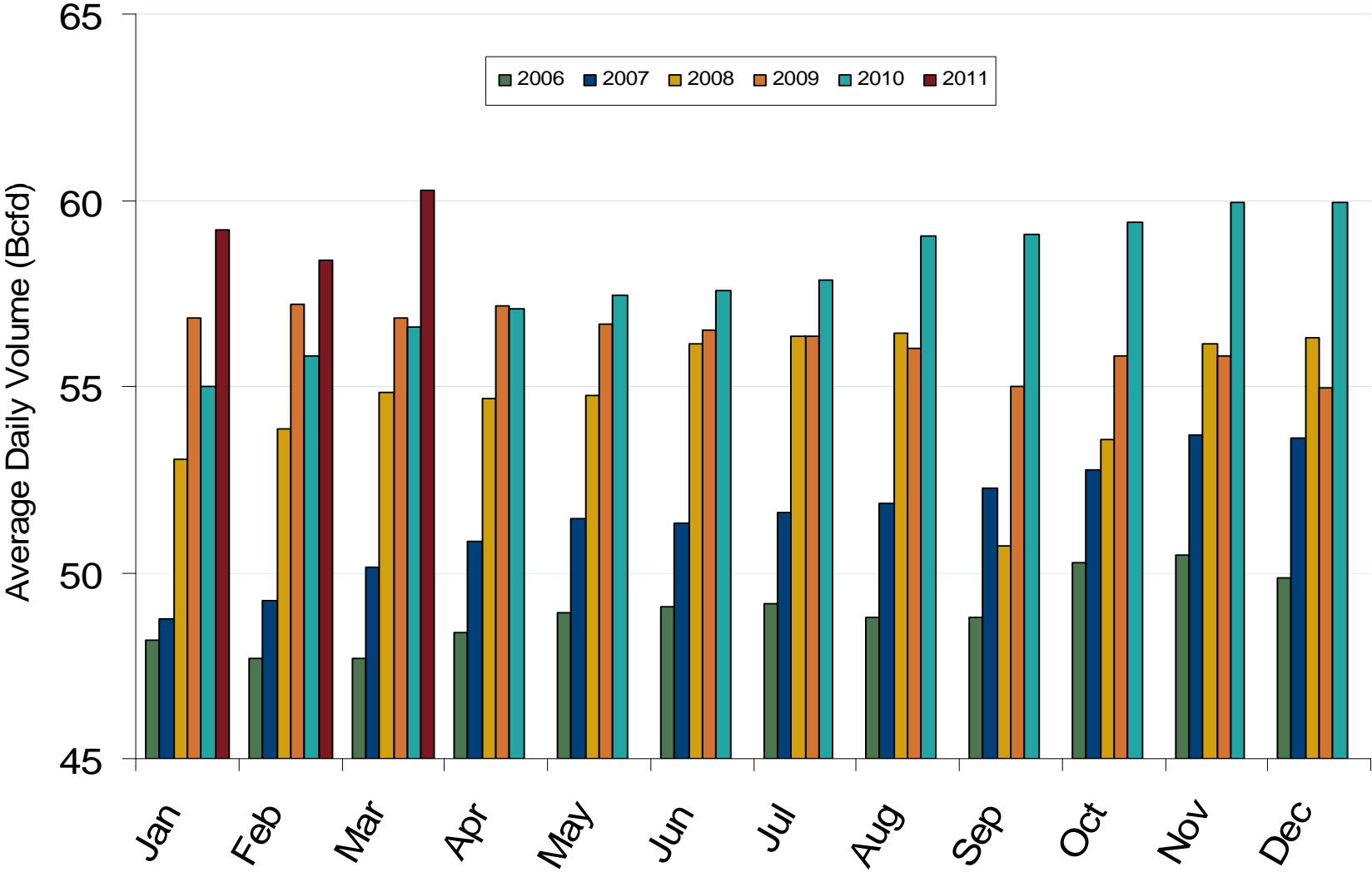
Updated April 8, 2011

# World LNG Estimated May 2011 Landed Prices



Source: *Waterborne Energy, Inc.* Data in \$US/MMBtu.  
April 2011

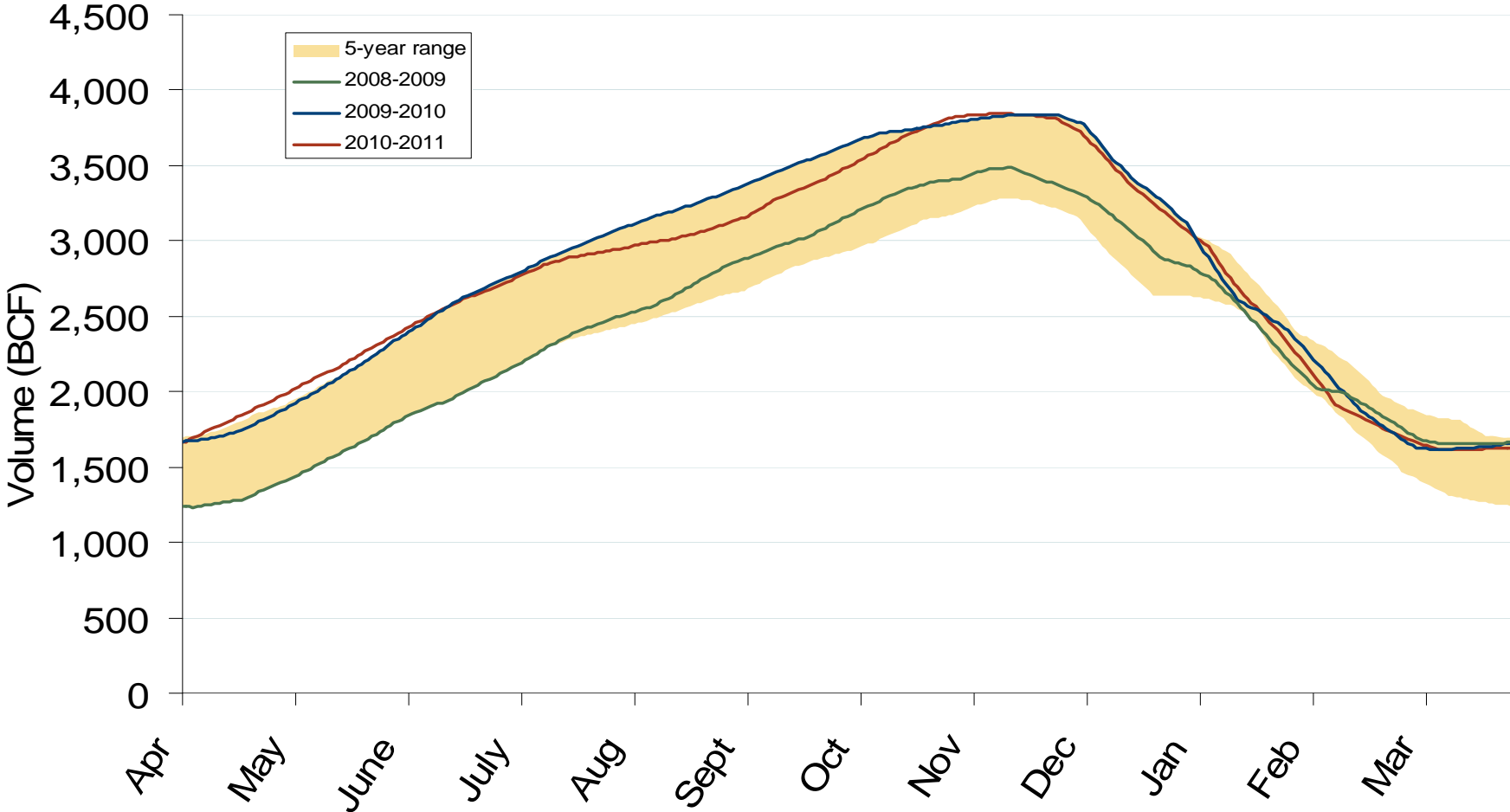
# U.S. Dry Gas Production



Source: Derived from EIA and Bentek data.  
April 2011

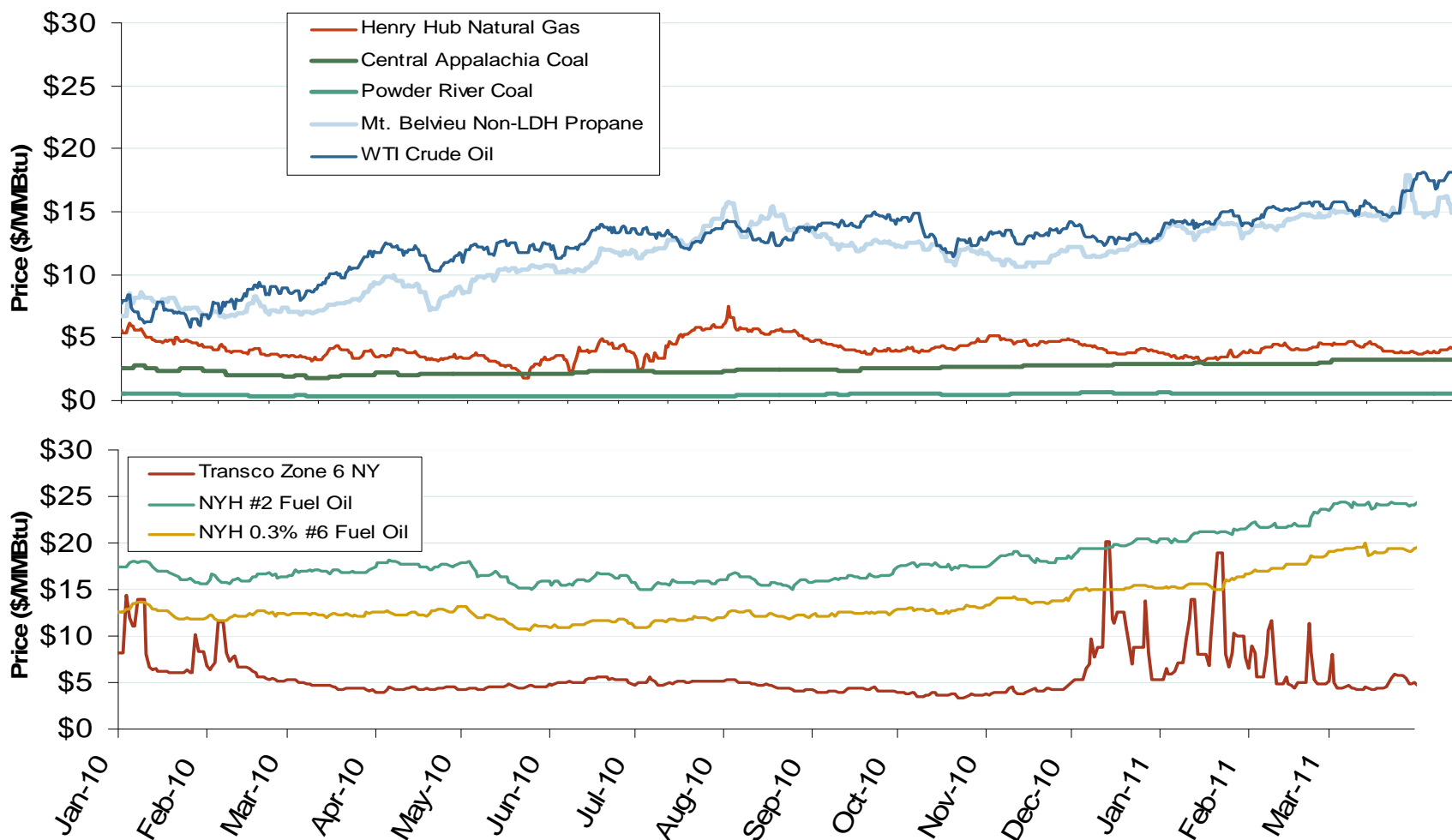
Updated April 8, 2011

# Total U.S. Working Gas in Storage



Source: Derived from EIA data.

## Oil, Coal and Natural Gas Daily Spot Prices



Source: Derived from ICE and Bloomberg data.

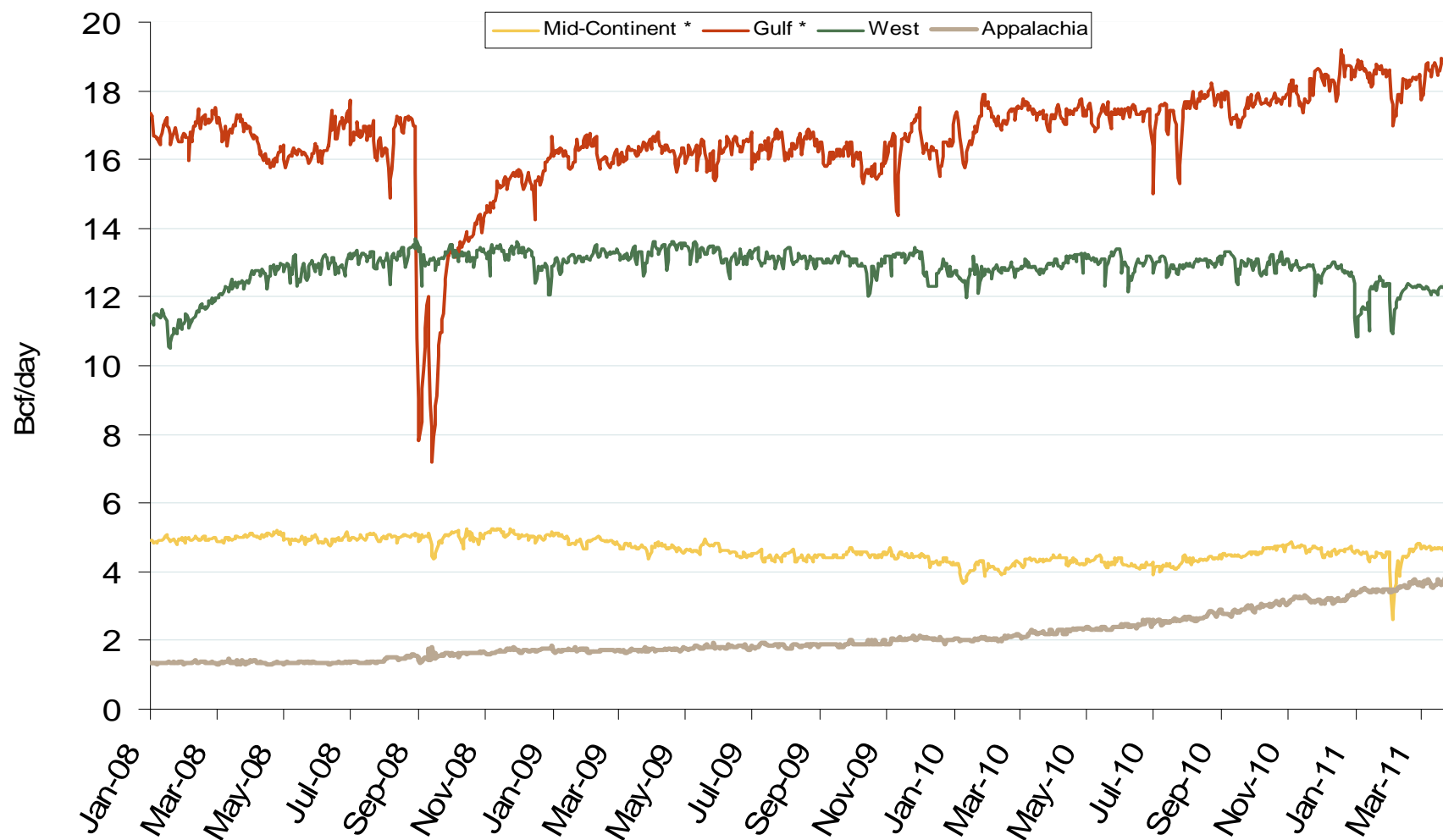
Note: Coal prices are quoted in \$/ton. Conversion factors to \$/MMBtu are based on contract specifications of 12,000 btus/pound for Central Appalachian coal and 8800 btus/pound for Powder River Basin coal.

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## Natural Gas Market Overview: Production By Region

Federal Energy Regulatory Commission • Market Oversight @ FERC.gov

## Regional Natural Gas Production

Source: Derived from *Bentek* data.

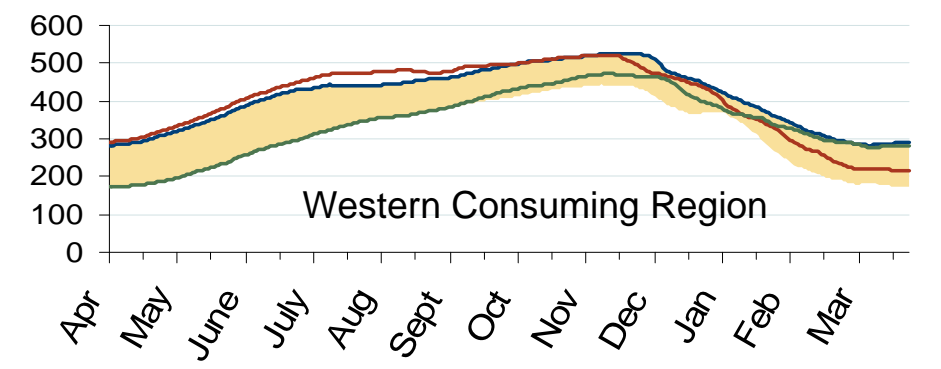
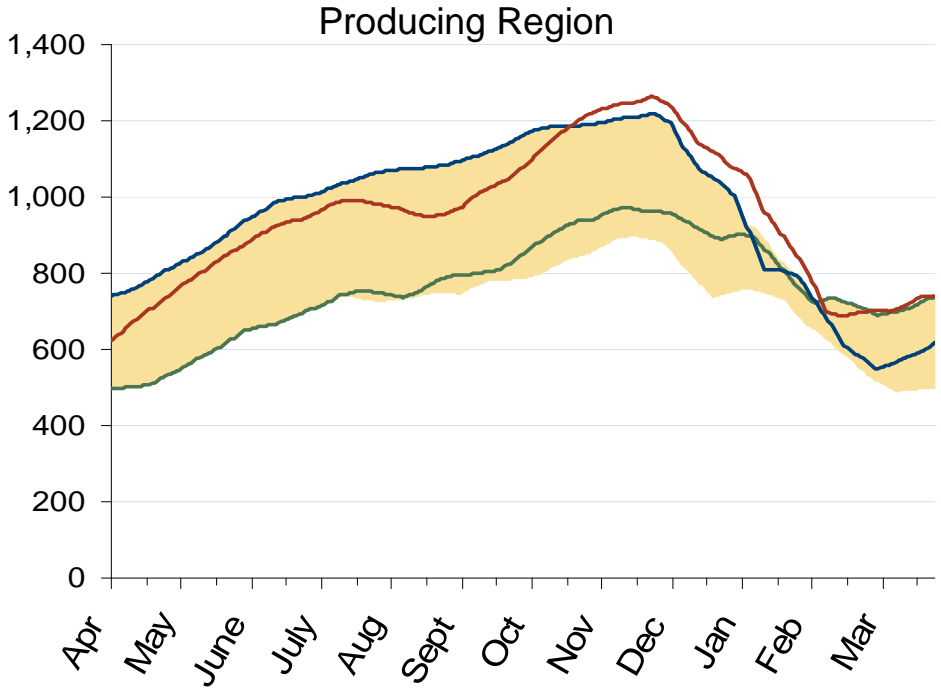
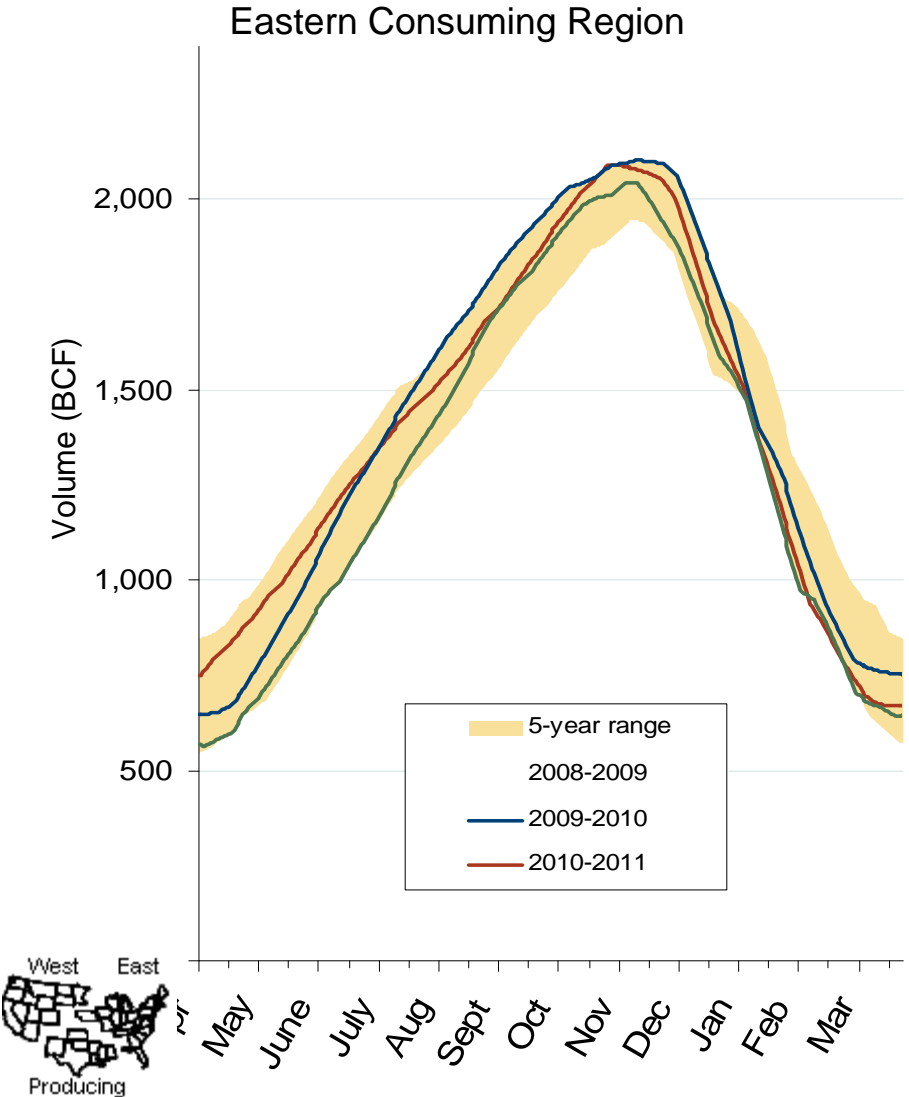
\* On July 1, 2009 Bentek redefined its regions, moving some of the southern Midcontinent production to the Southeast, which is included in Gulf series.

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# Regional Totals of Working Gas in Storage



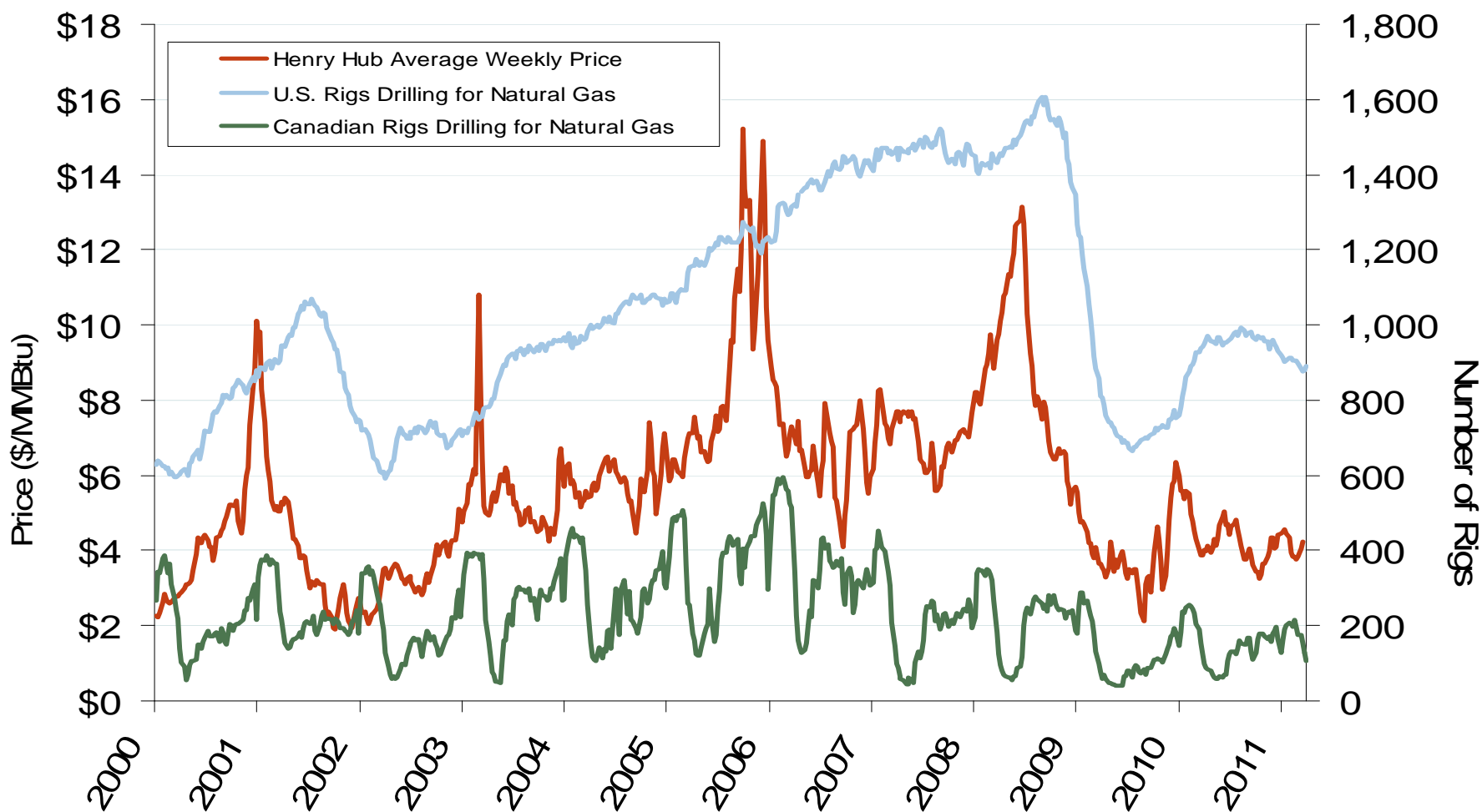
Source: Derived from EIA data.

April 2011

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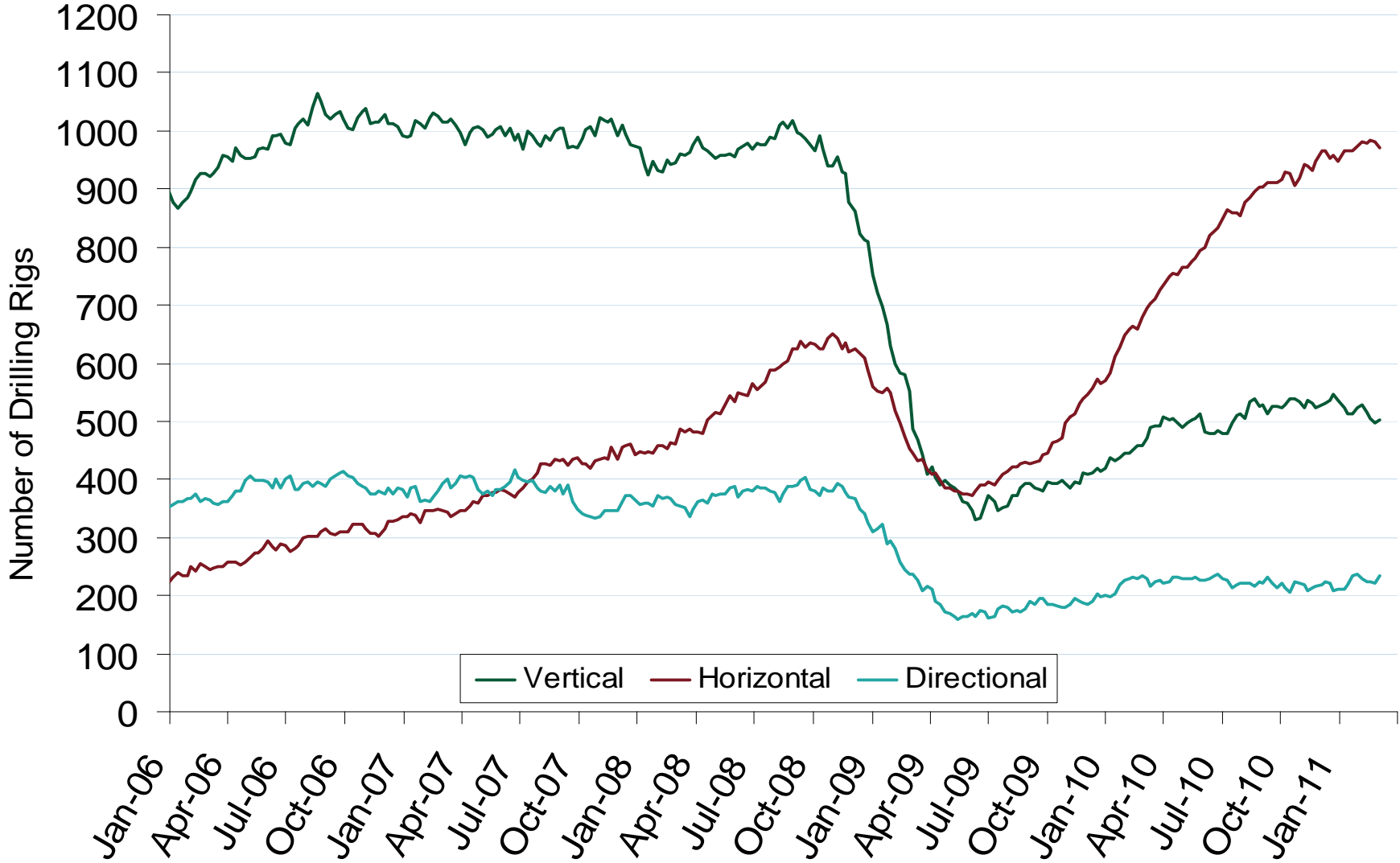
## U.S. and Canadian Natural Gas Drilling Rig Count and Daily Spot Prices



Source: Derived from *Platts* and *Baker Hughes* data.

Updated April 8, 2011

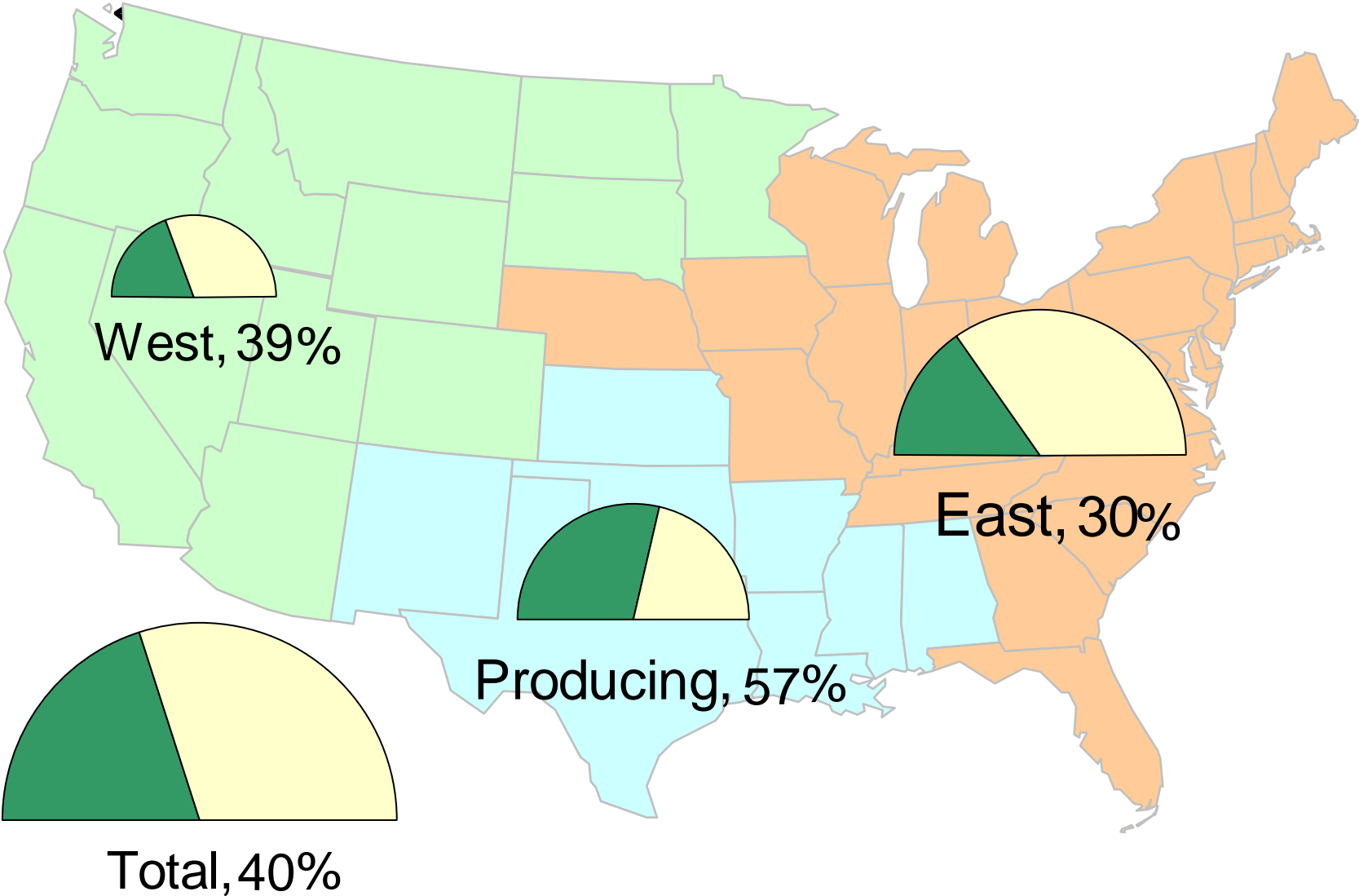
# U.S. Oil and Natural Gas Drilling Rig Count by Type



Source: Derived from *Platts* and *Baker Hughes* data.

Updated April 8, 2011

# Natural Gas Storage Inventories – March 25, 2011

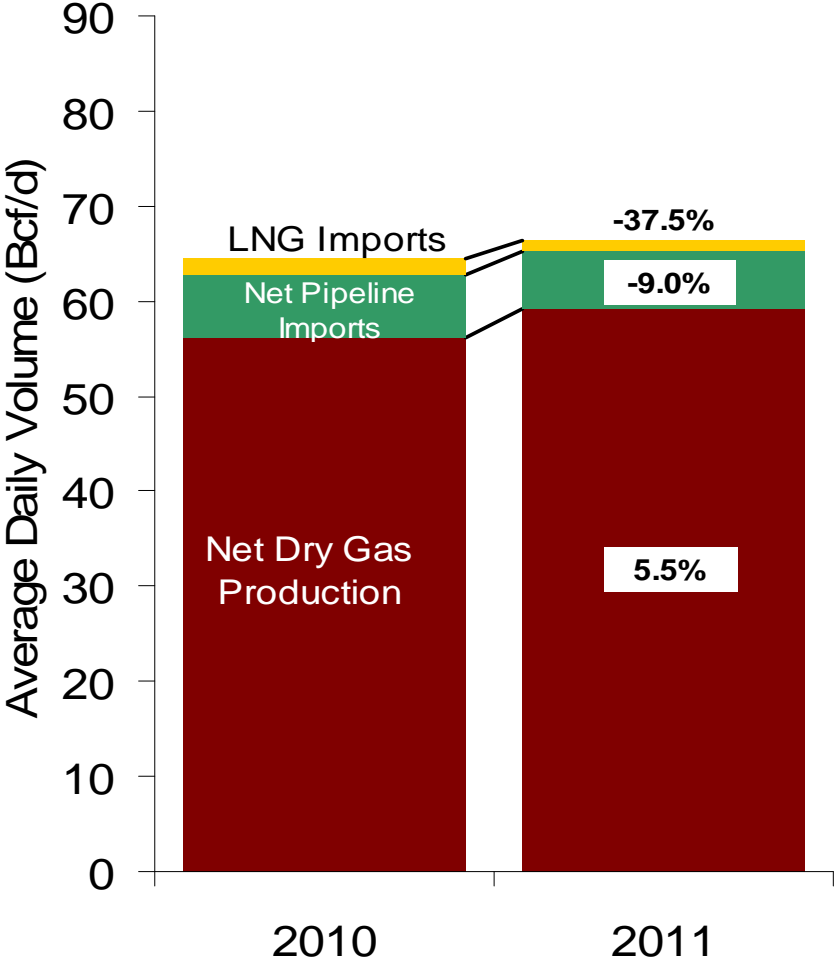


Source: Derived from EIA Storage and Estimated Working Gas Capacity data.

# U.S. Natural Gas Supply and Demand 2010 vs. 2011: January - March

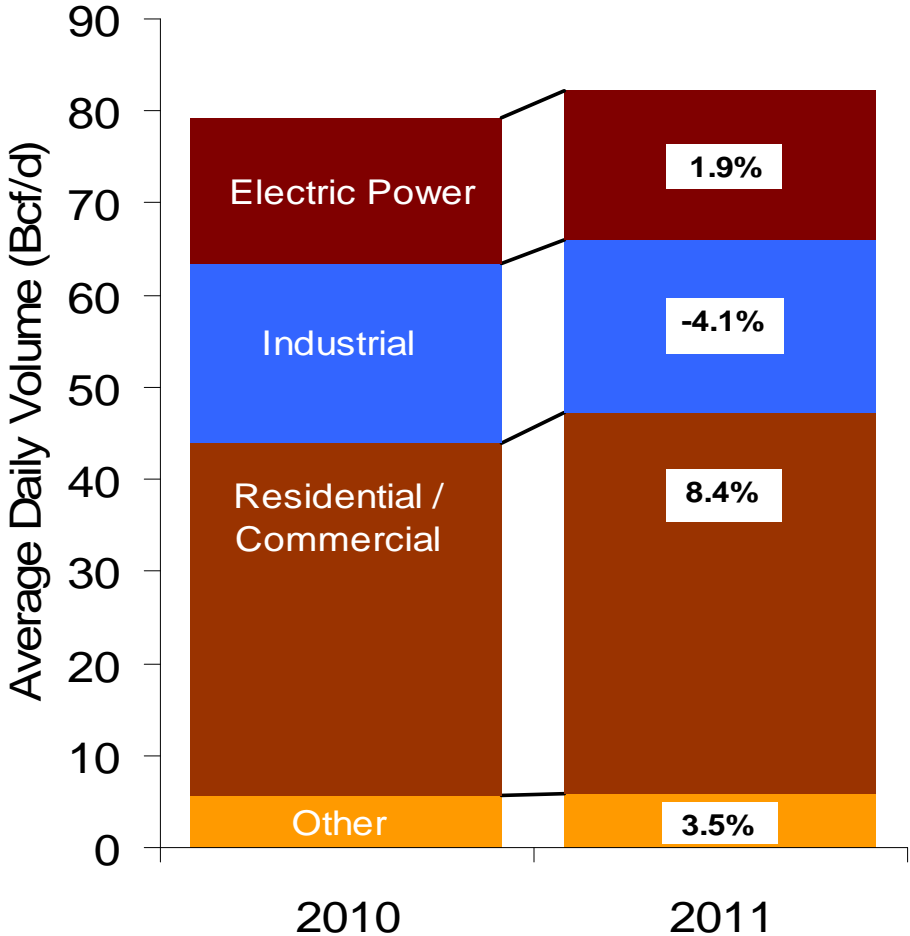
### US Natural Gas Supply

Total Change in Supply 3.4%



### US Natural Gas Demand

Total Change in Demand 3.5%



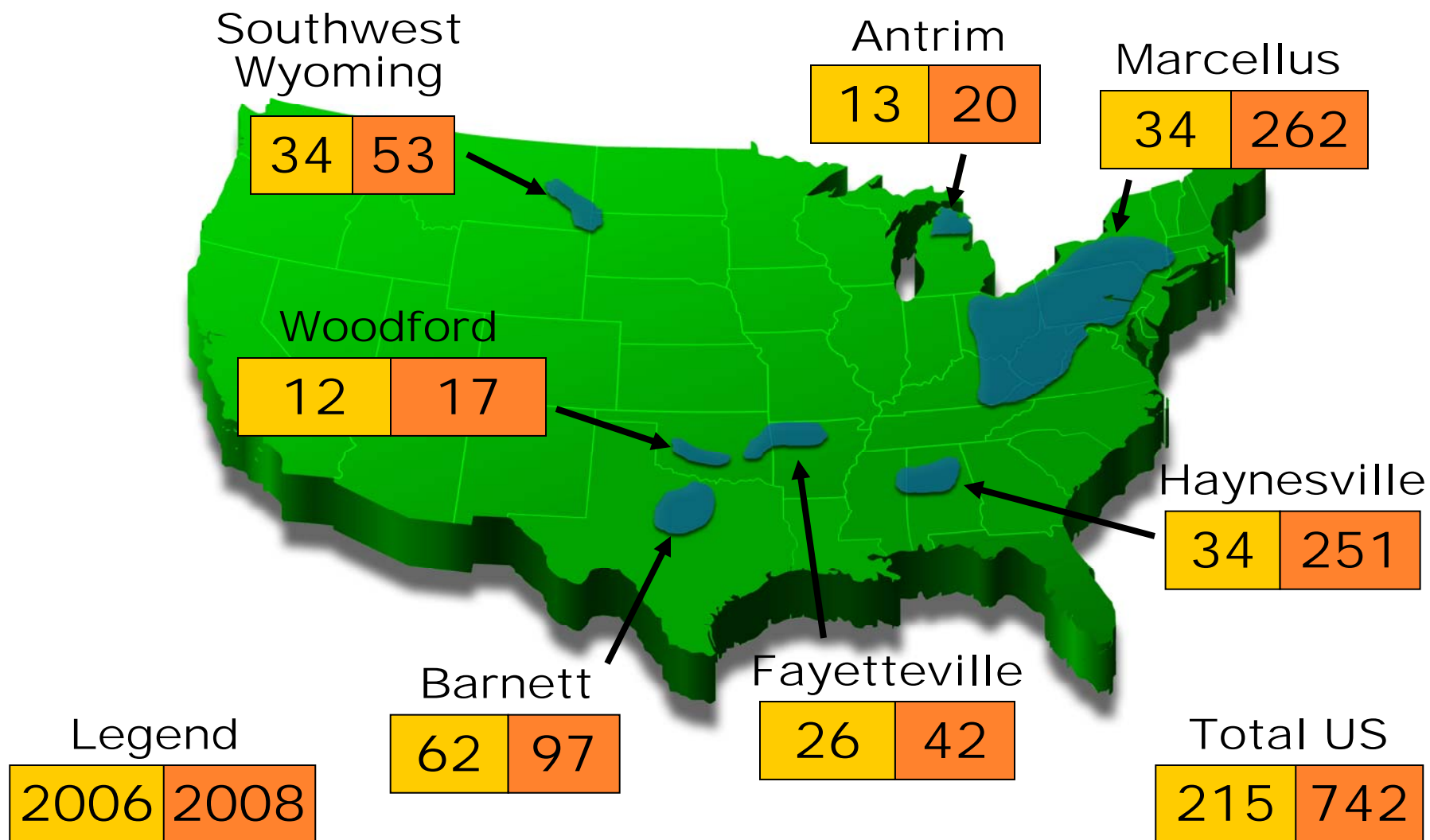
Source: Derived from Bentek data.  
April 2011

Updated April 8, 2011

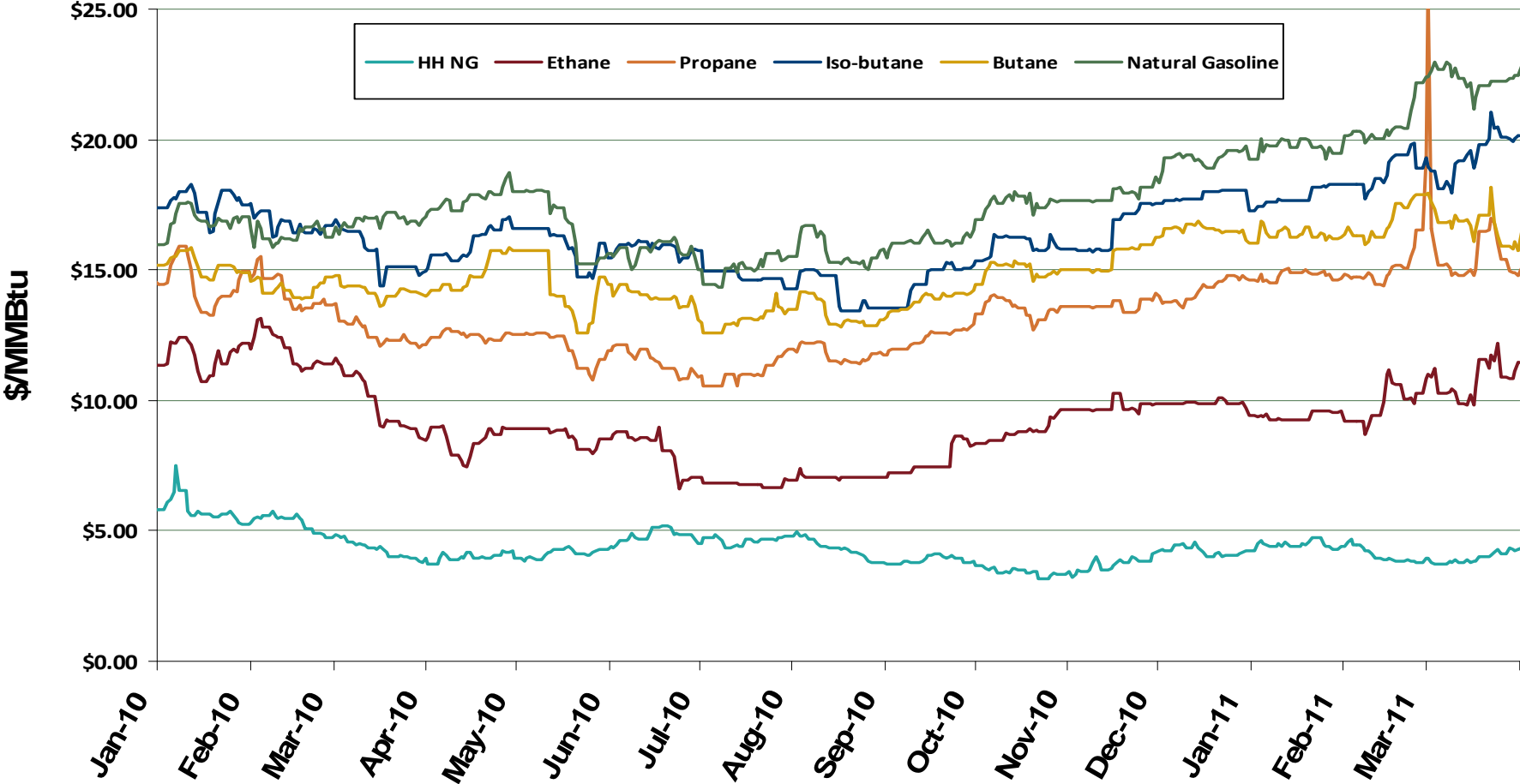
## Year-to-date U.S. Natural Gas Consumption



## Estimated Recoverable NG For Select Shale Basins (TCF)



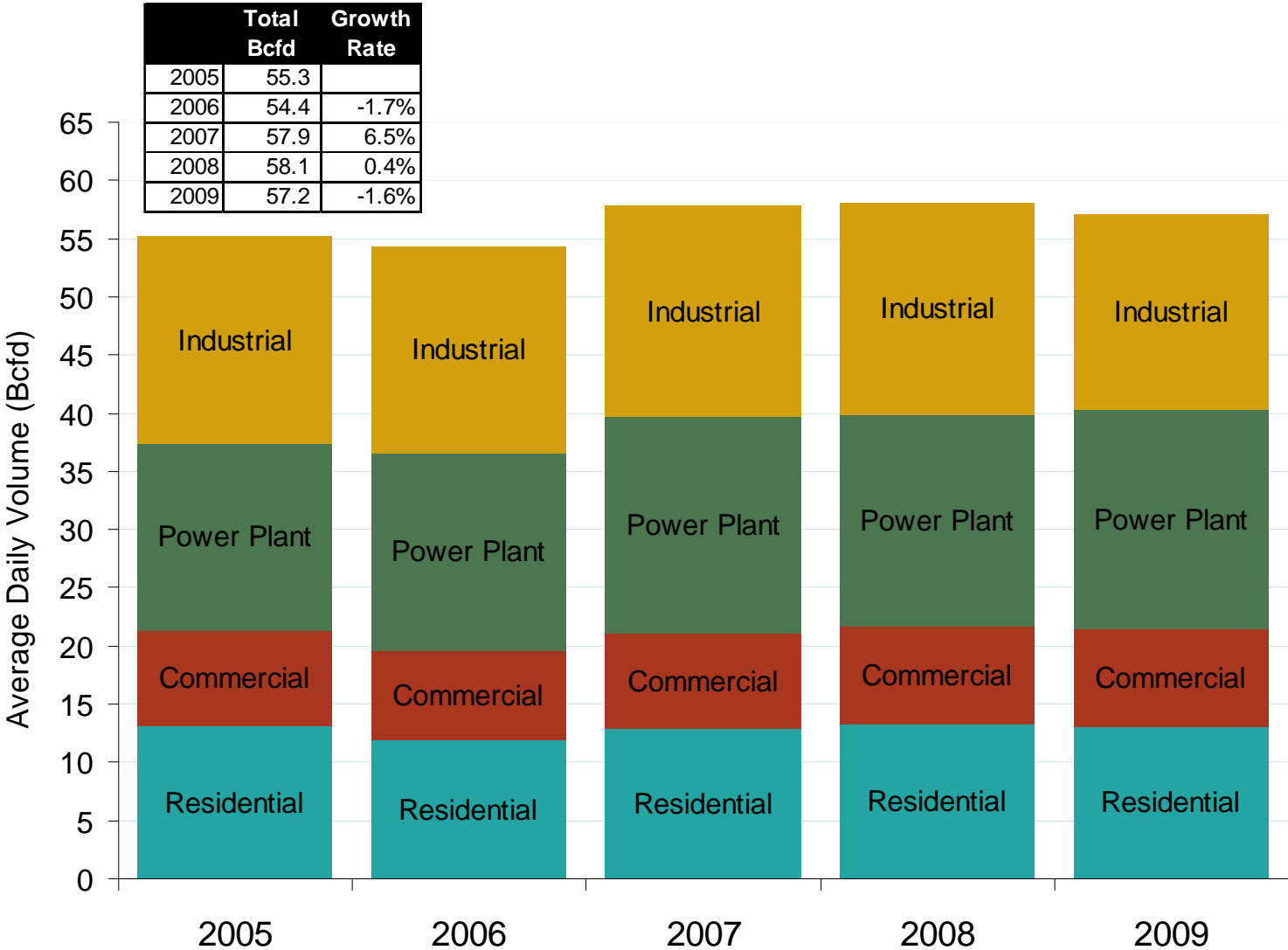
# U.S. Natural Gas vs. Natural Gas Liquids (NGL) Prices



Source: Derived from Bloomberg Data  
April 2011

Updated: April 07, 2011

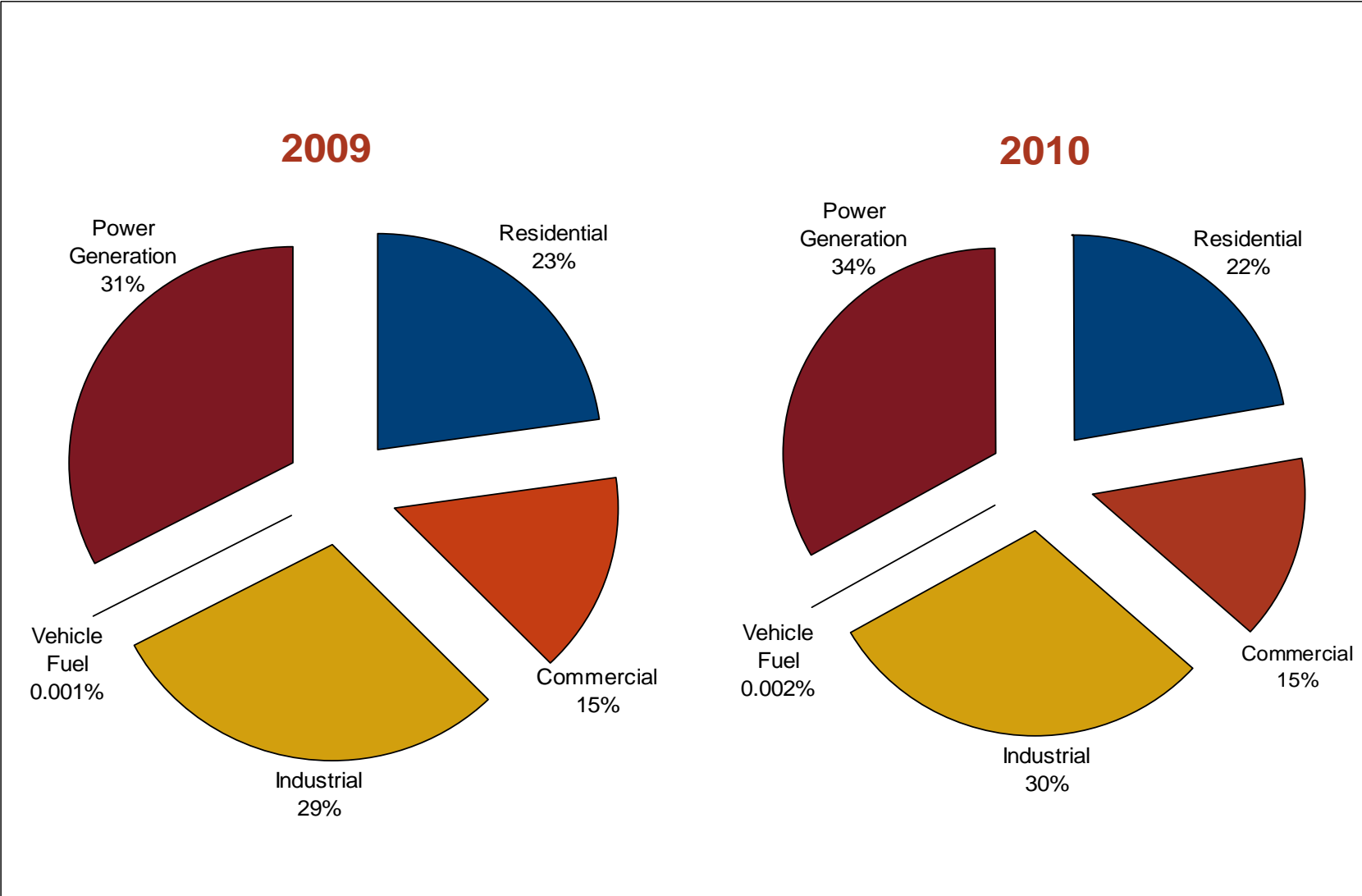
# U.S. Natural Gas Consumption – Lower 48 States



Source: Derived from EIA data  
April 2011

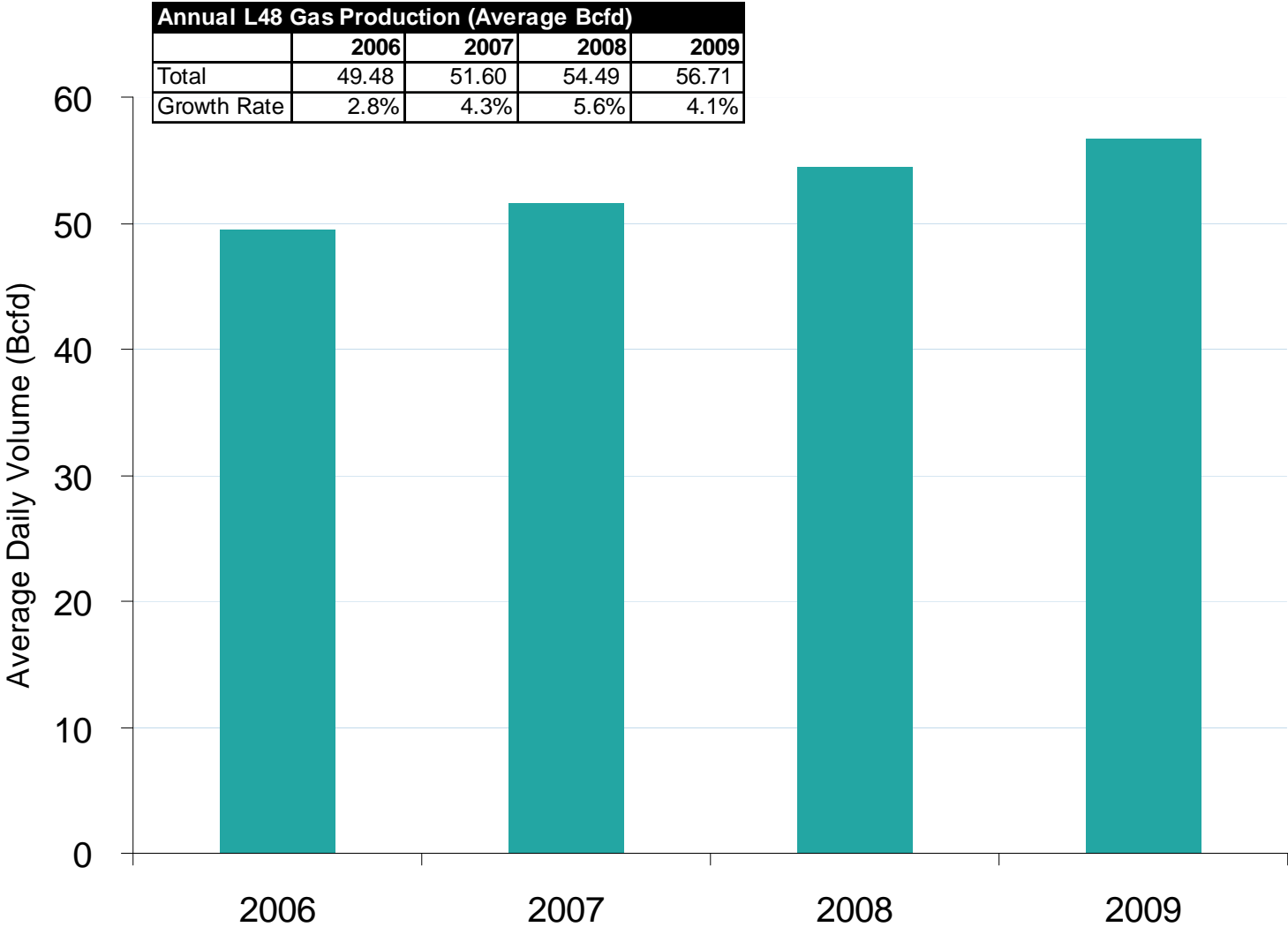


# U.S. Annual Natural Gas Demand by Sector



Source: Derived from EIA data.

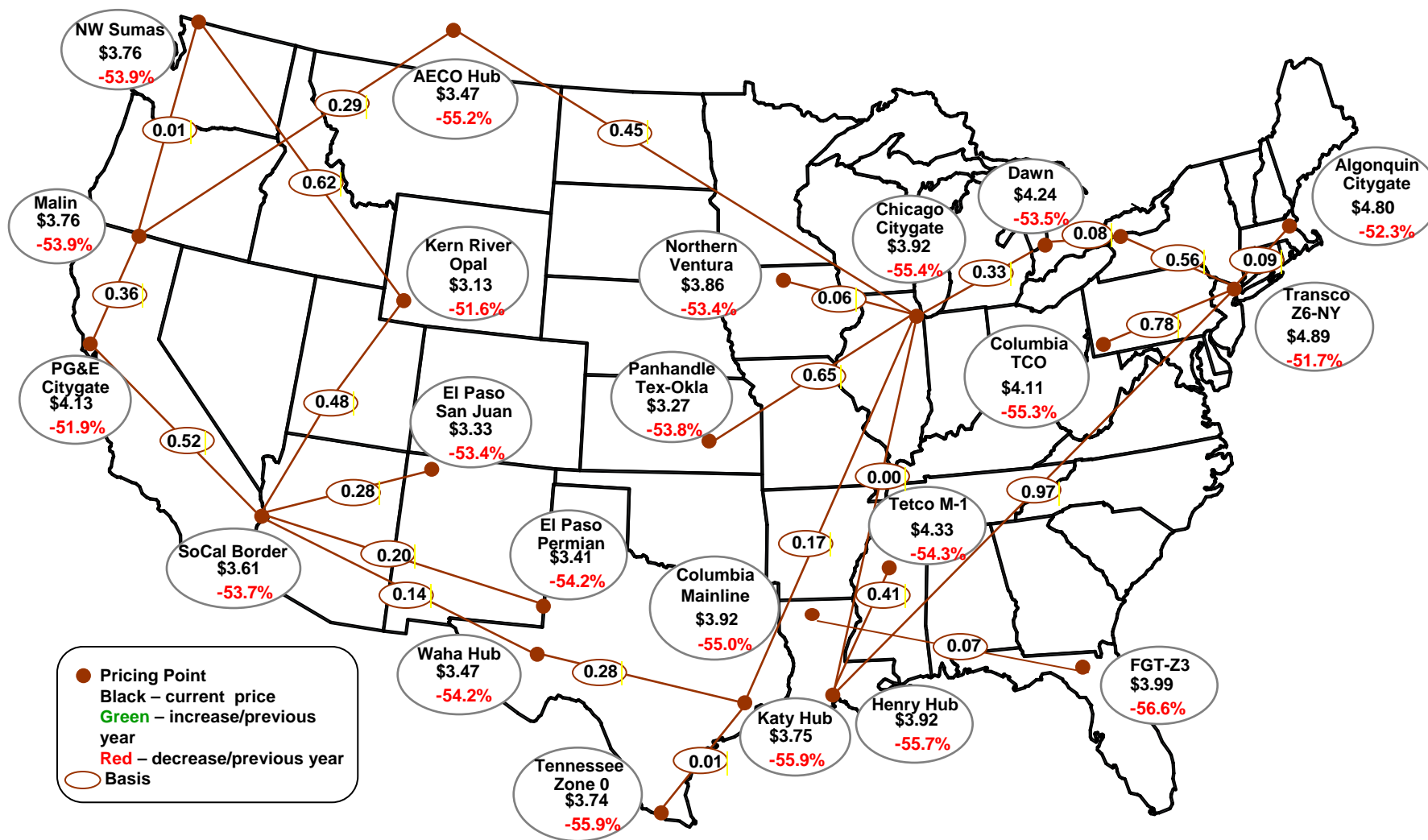
# U.S. Dry Gas Production – Lower 48 States



Source: Derived from EIA data.  
April 2011

Updated March 5, 2010

## Average Spot Gas Prices, 2009 (\$MMBtu)

Source: Derived from *Platts* data.

April 2011

Updated July 9, 2010

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