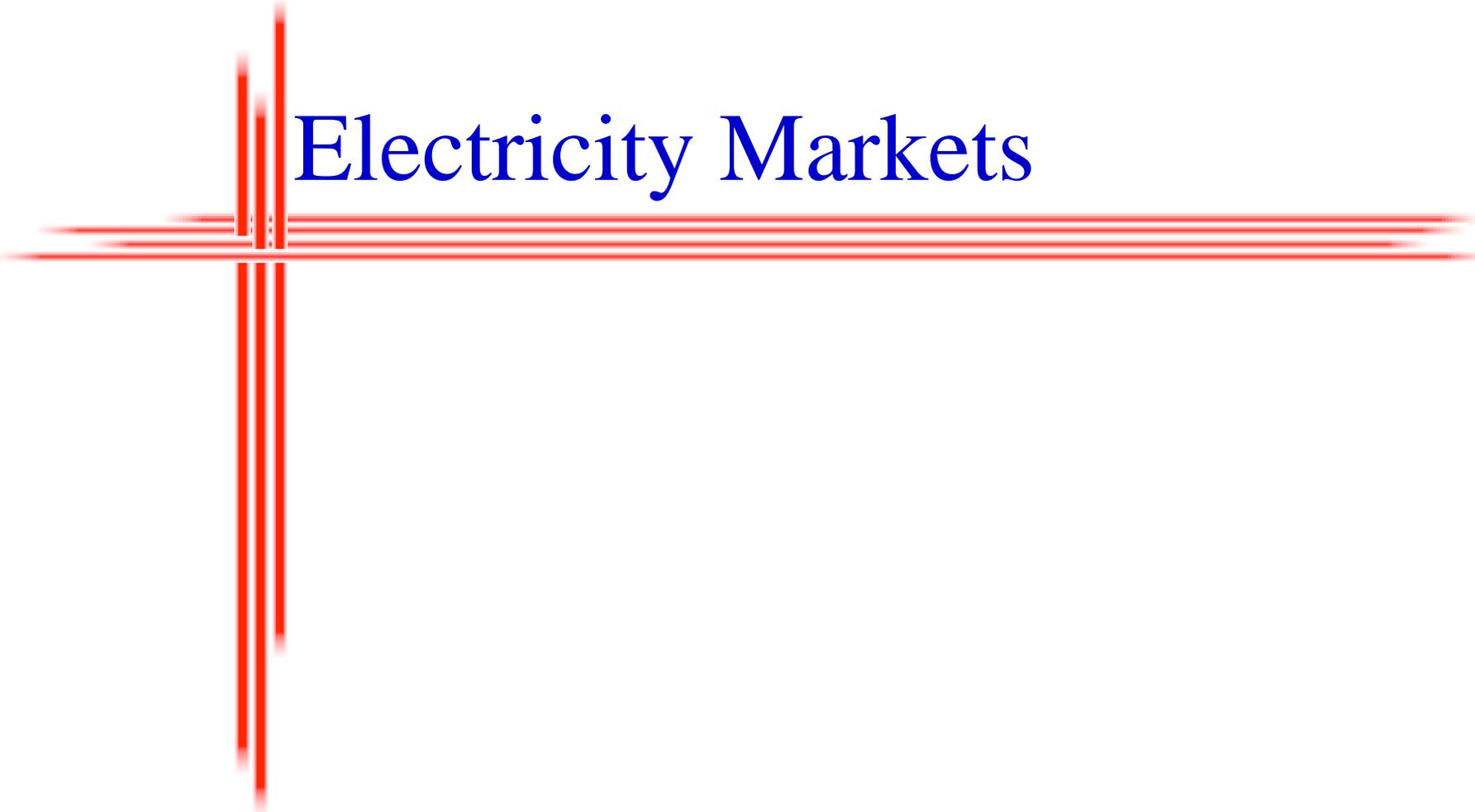


# OE ENERGY MARKET SNAPSHOT

## National Version – June 2010 Data

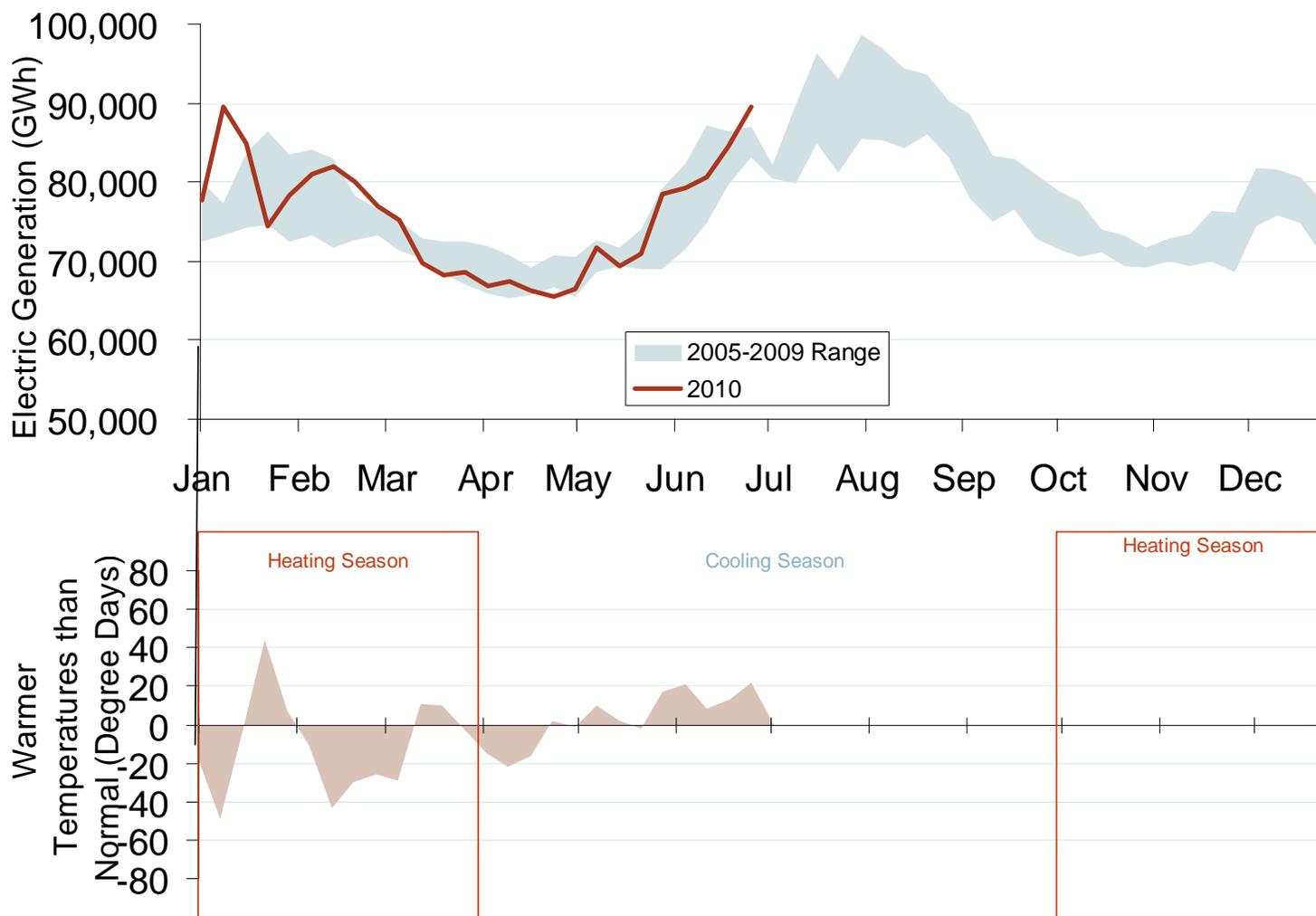
- **Electricity Markets**
- **Natural Gas and Fuel Markets**

Office of Enforcement  
Federal Energy Regulatory Commission  
July 2010

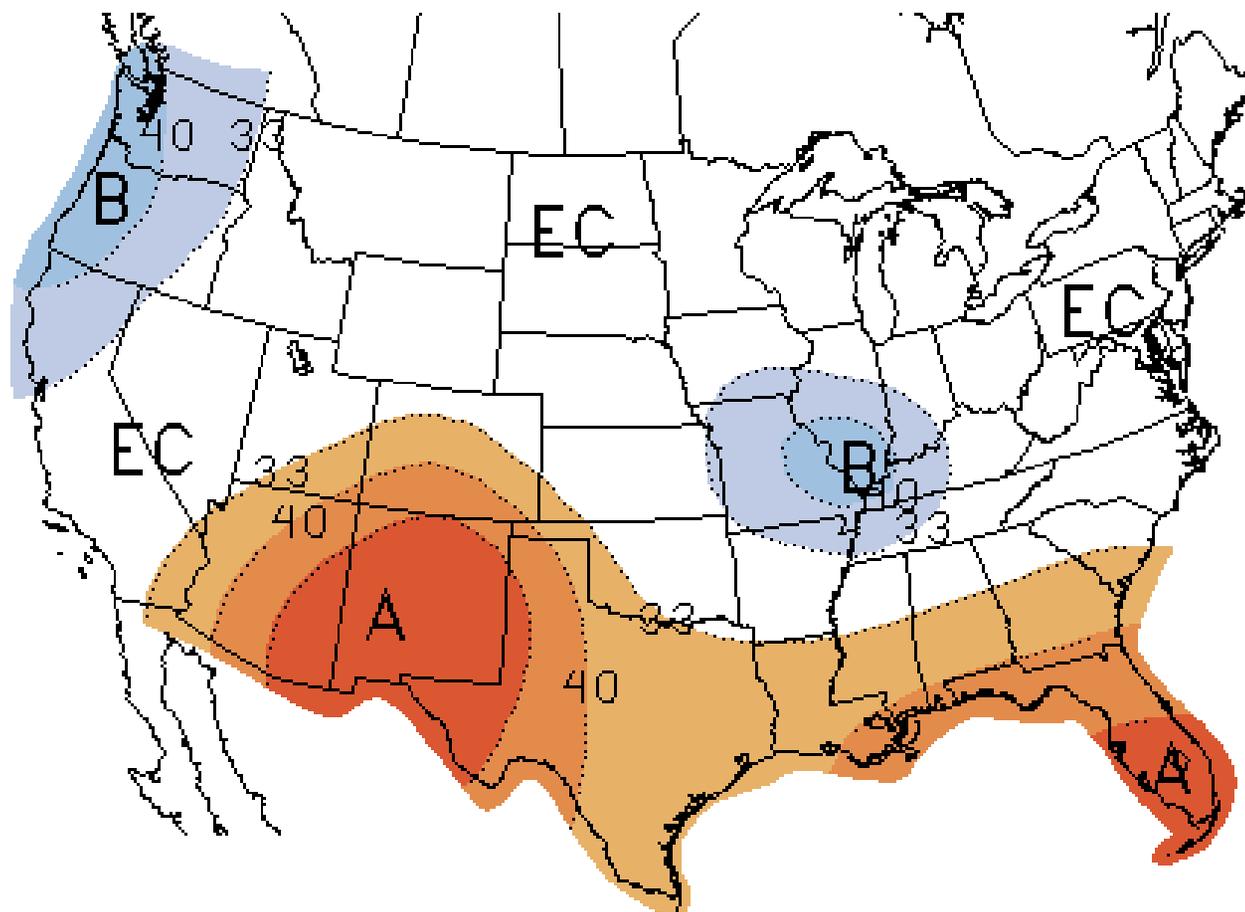


# Electricity Markets

# Weekly U.S. Electric Generation Output and Temperatures

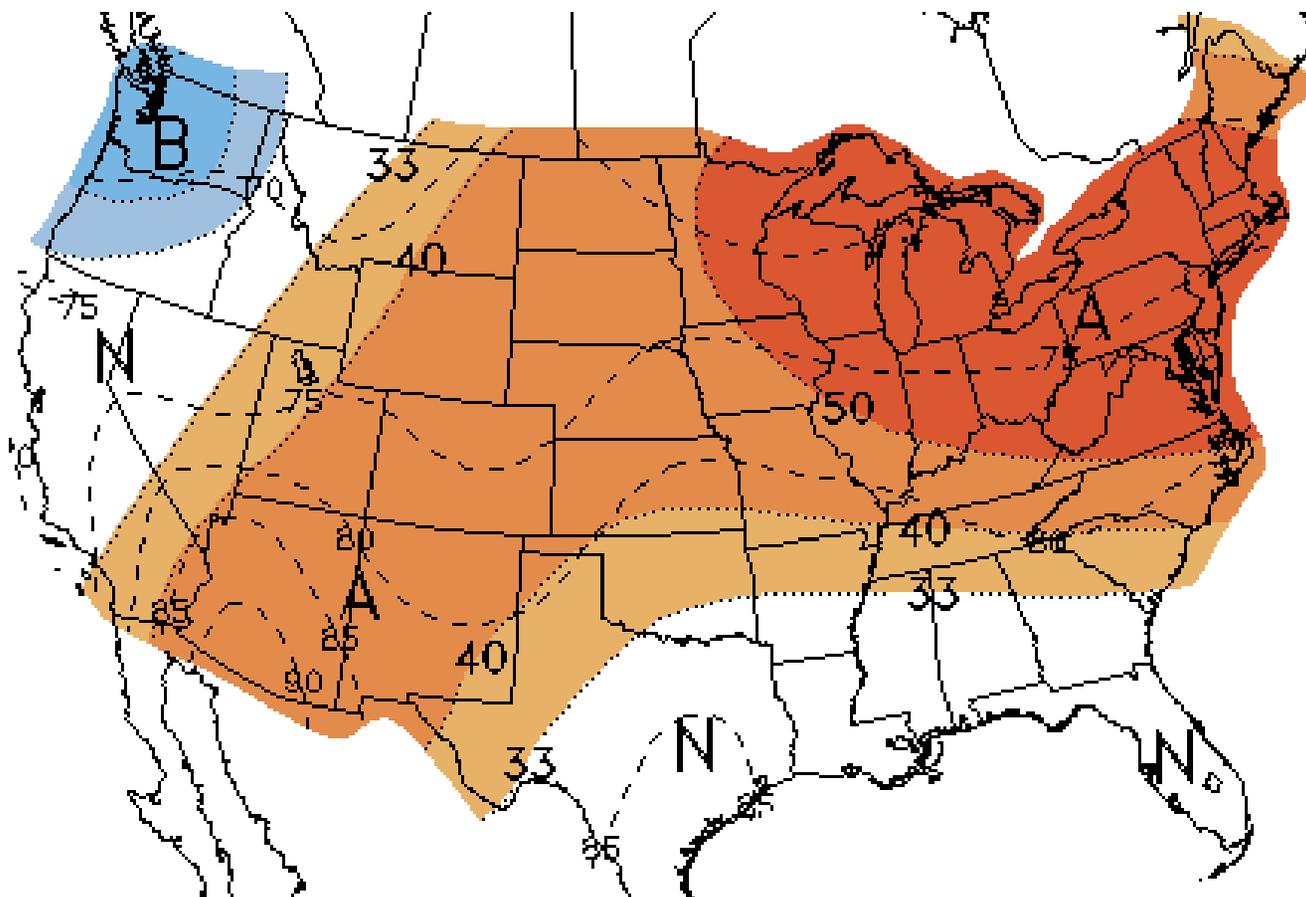


## NOAA's Monthly Temperature Forecast Made June 30, Valid for July 2010



Note: "A" areas are above normal, "B" areas are below normal and "EC" means equal chance. Normal is based on the last 30 years of data.

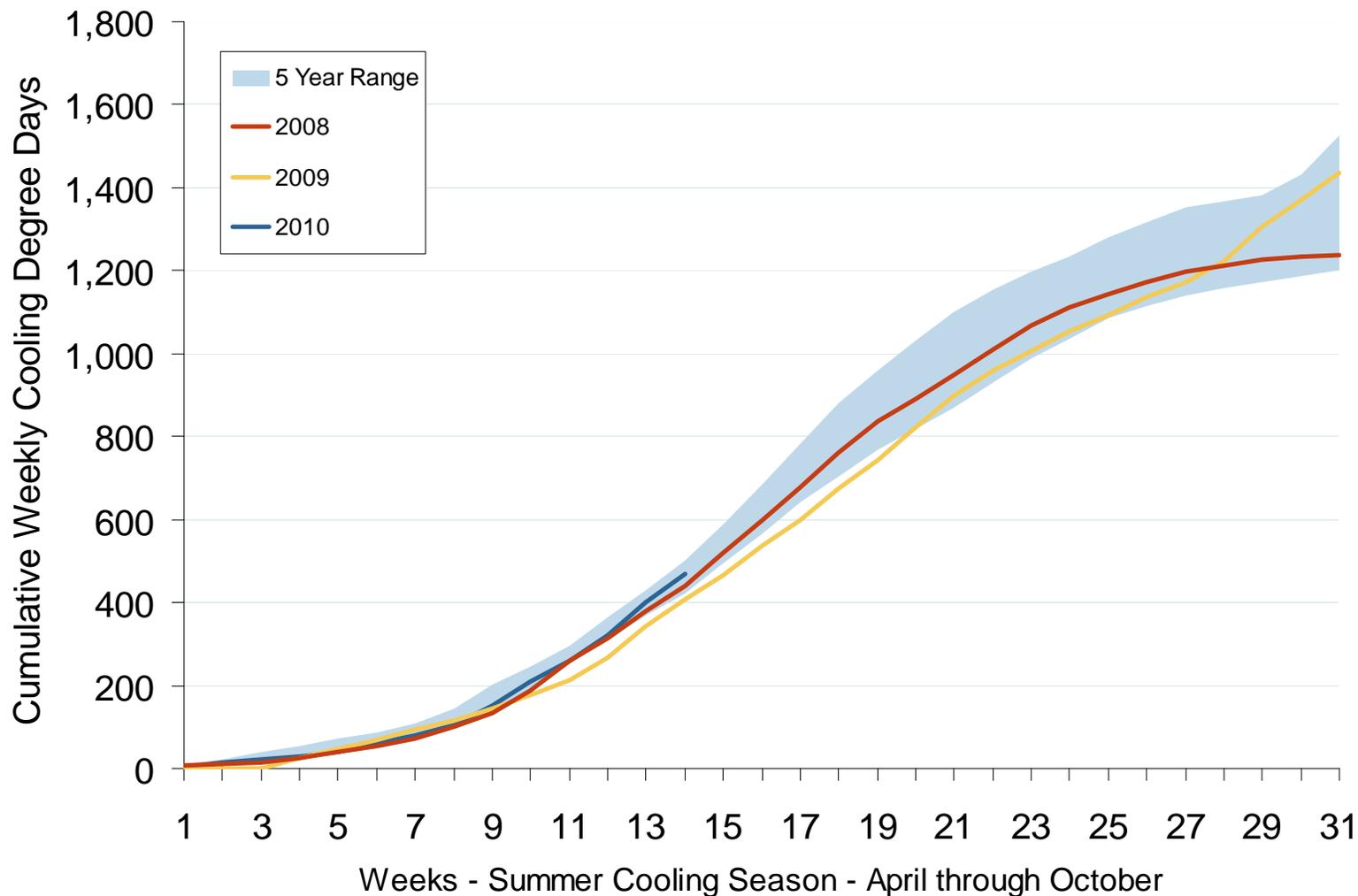
## NOAA's 8 to 14 Day Temperature Forecast Made July 8, Valid for July 16 - 22, 2010



Note: "A" areas are above normal and "B" areas are below normal. Normal is based on the last 30 years of data.

Source: NOAA

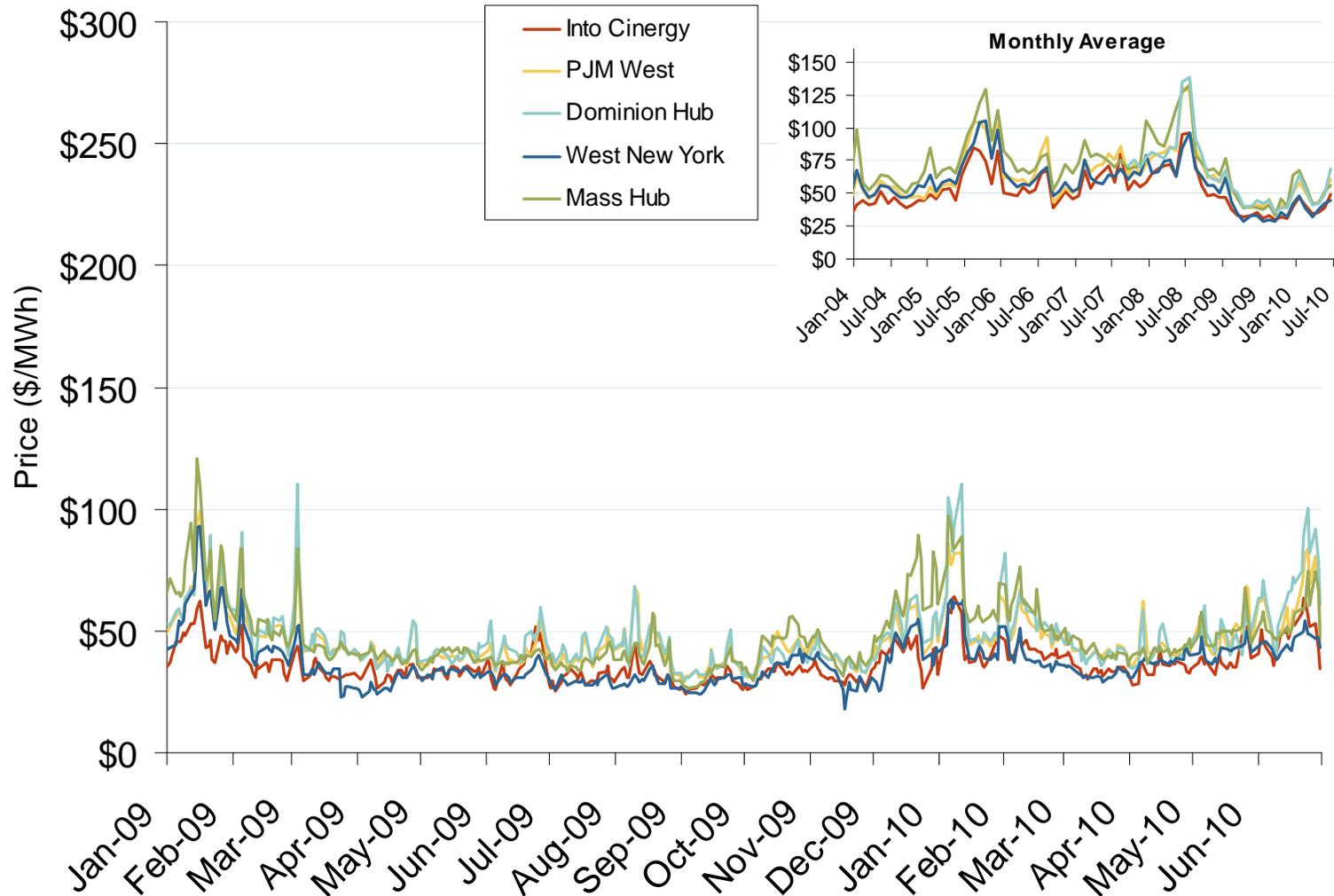
## U. S. Summer Cumulative Cooling Degree Days - 2010



Source: Derived from NOAA data.

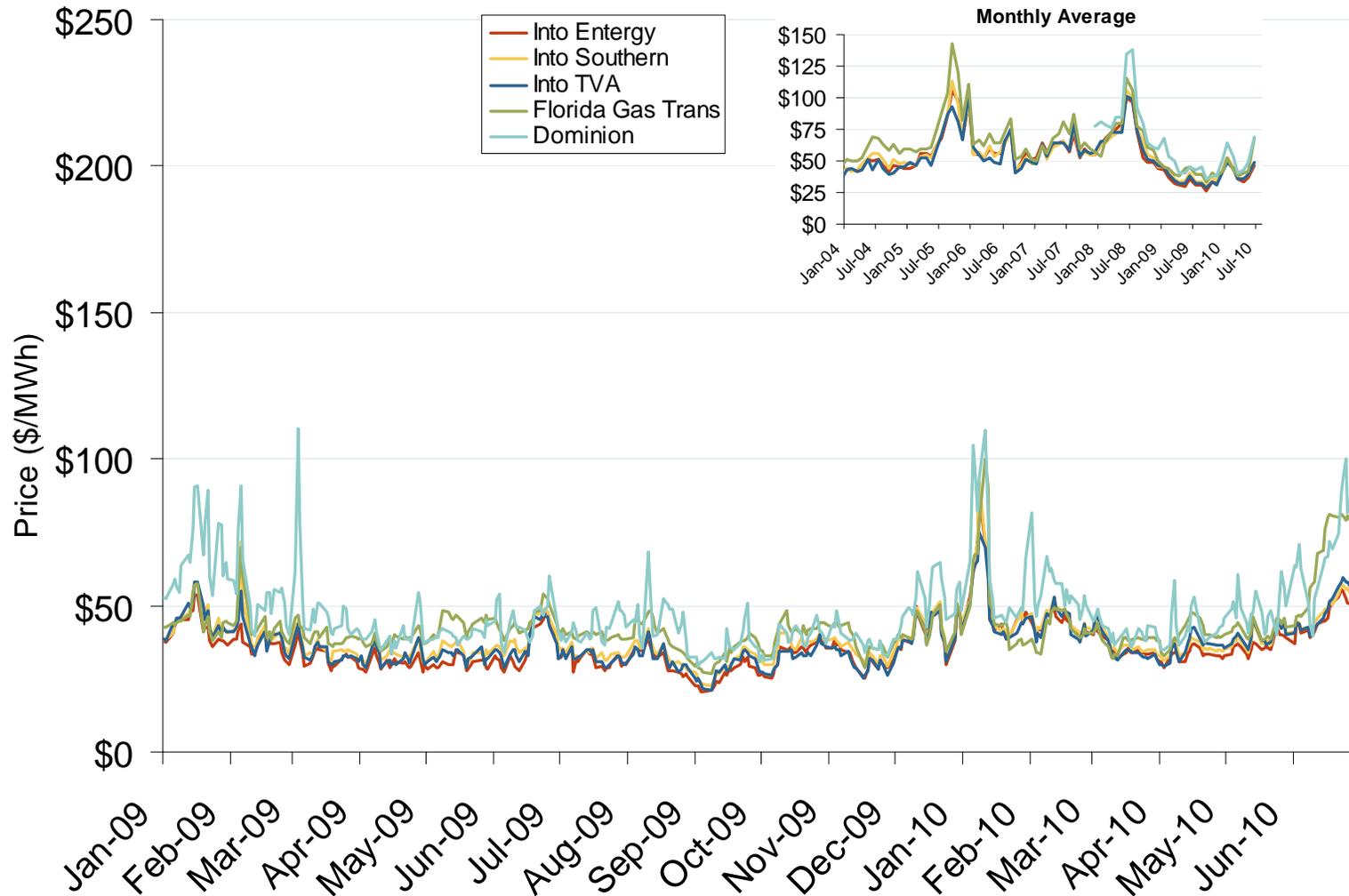
Updated July 9, 2010

## Eastern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data.  
July 2010 National Snapshot Report

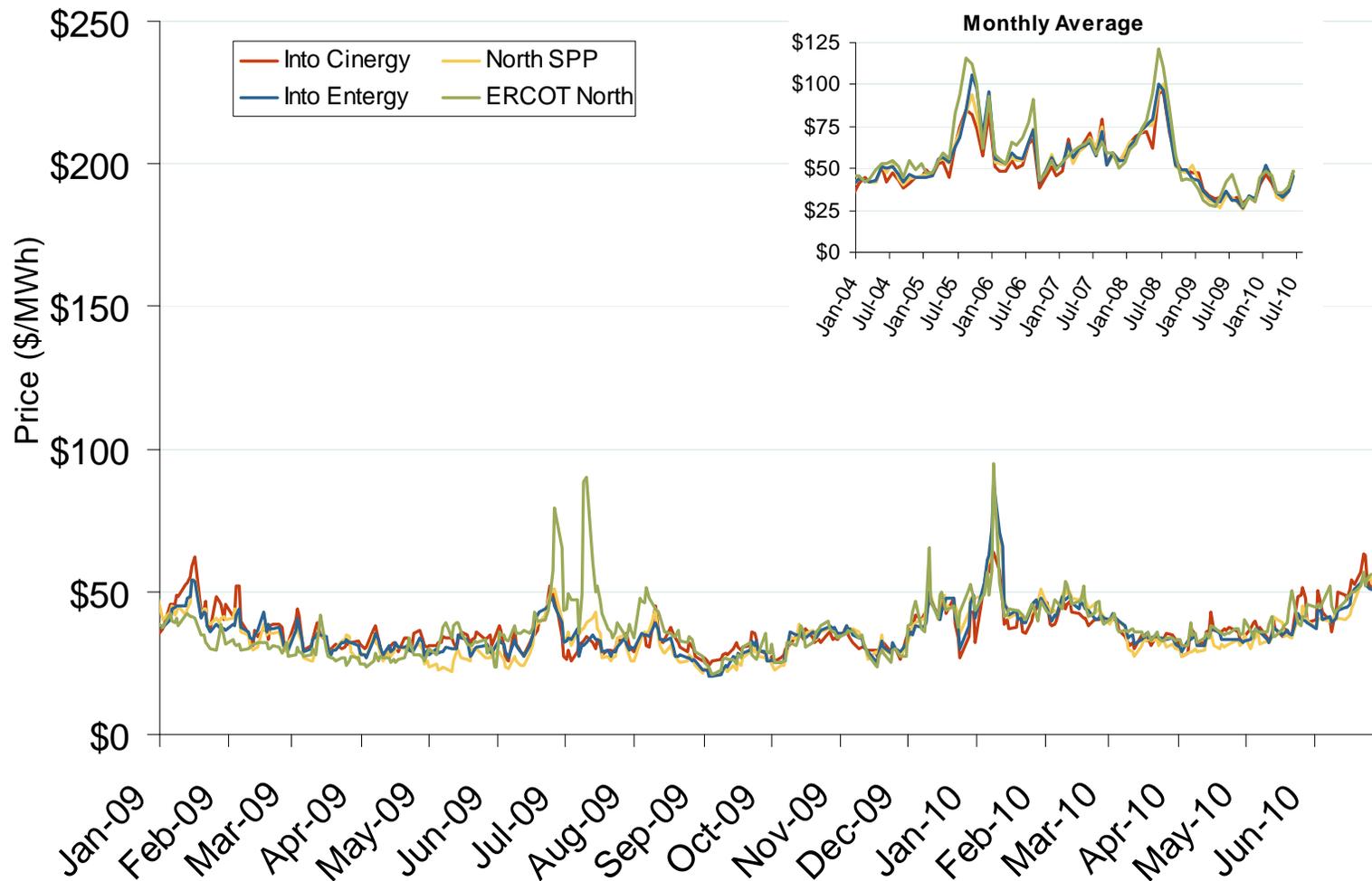
# Southeastern Daily Bilateral Day-Ahead On-Peak Prices



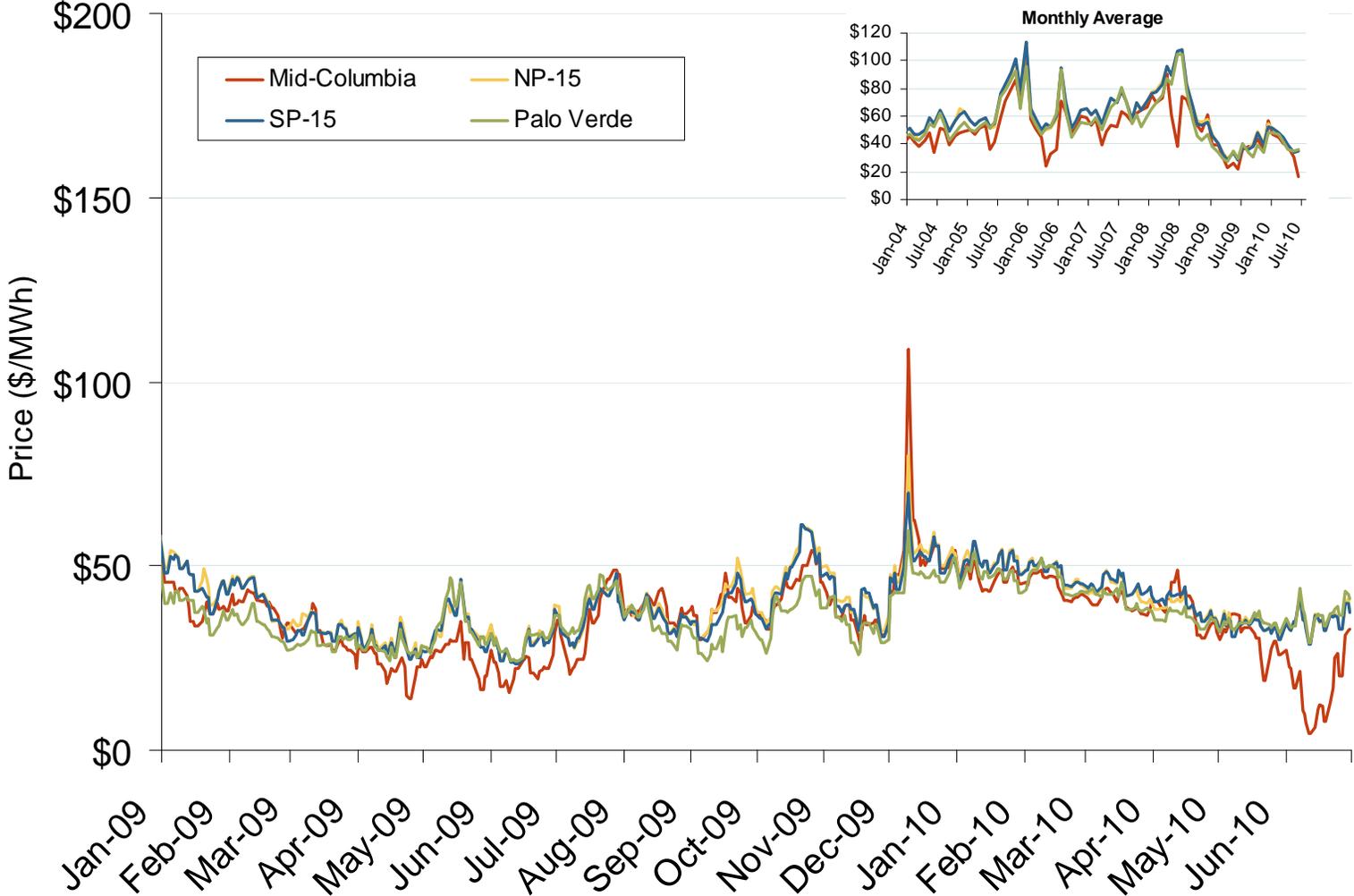
Source: Derived from *Platts* data.  
 July 2010 National Snapshot Report

Updated July 9, 2010

## Central Daily Bilateral Day-Ahead On-Peak Prices

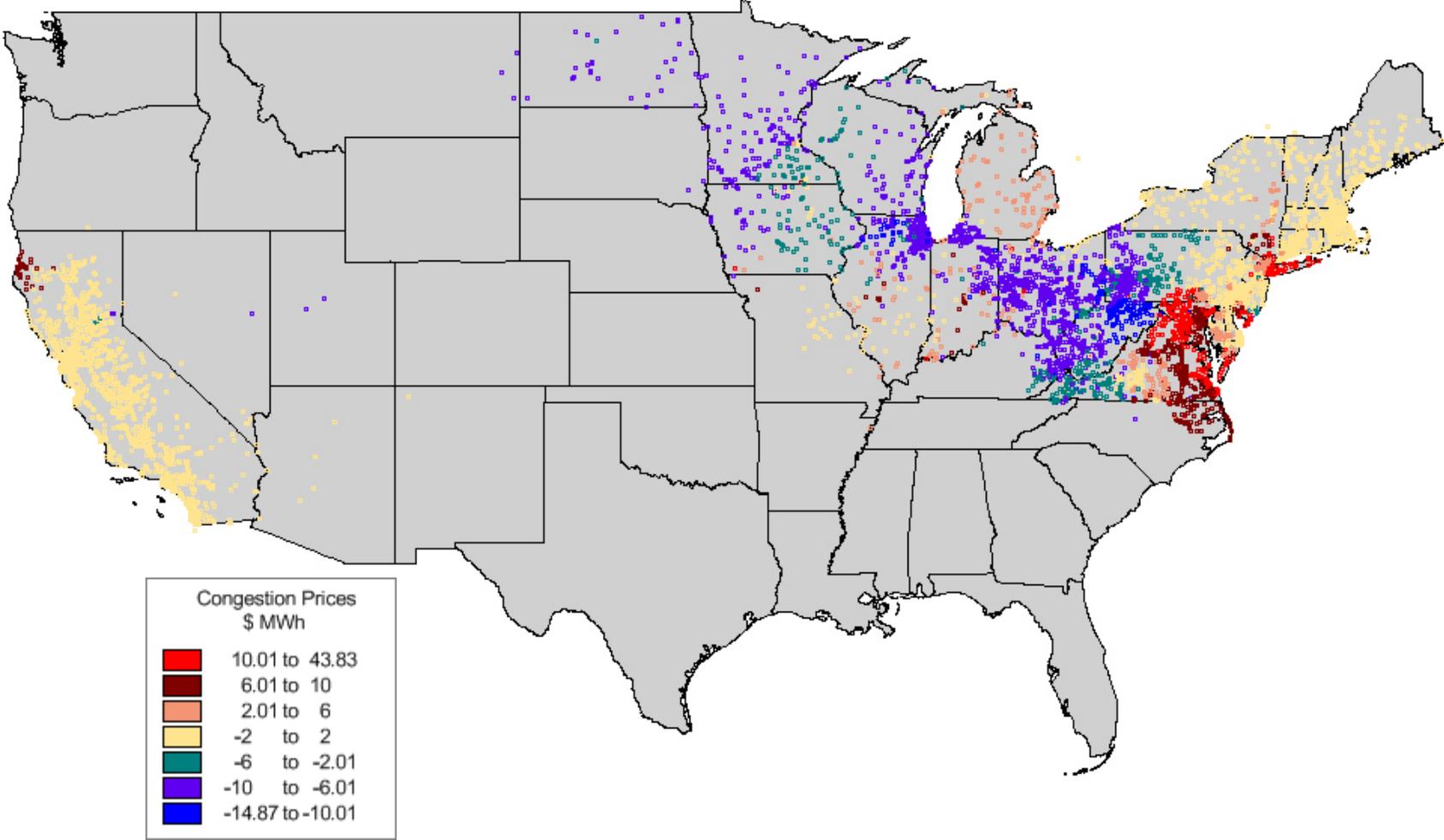


# Western Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data.

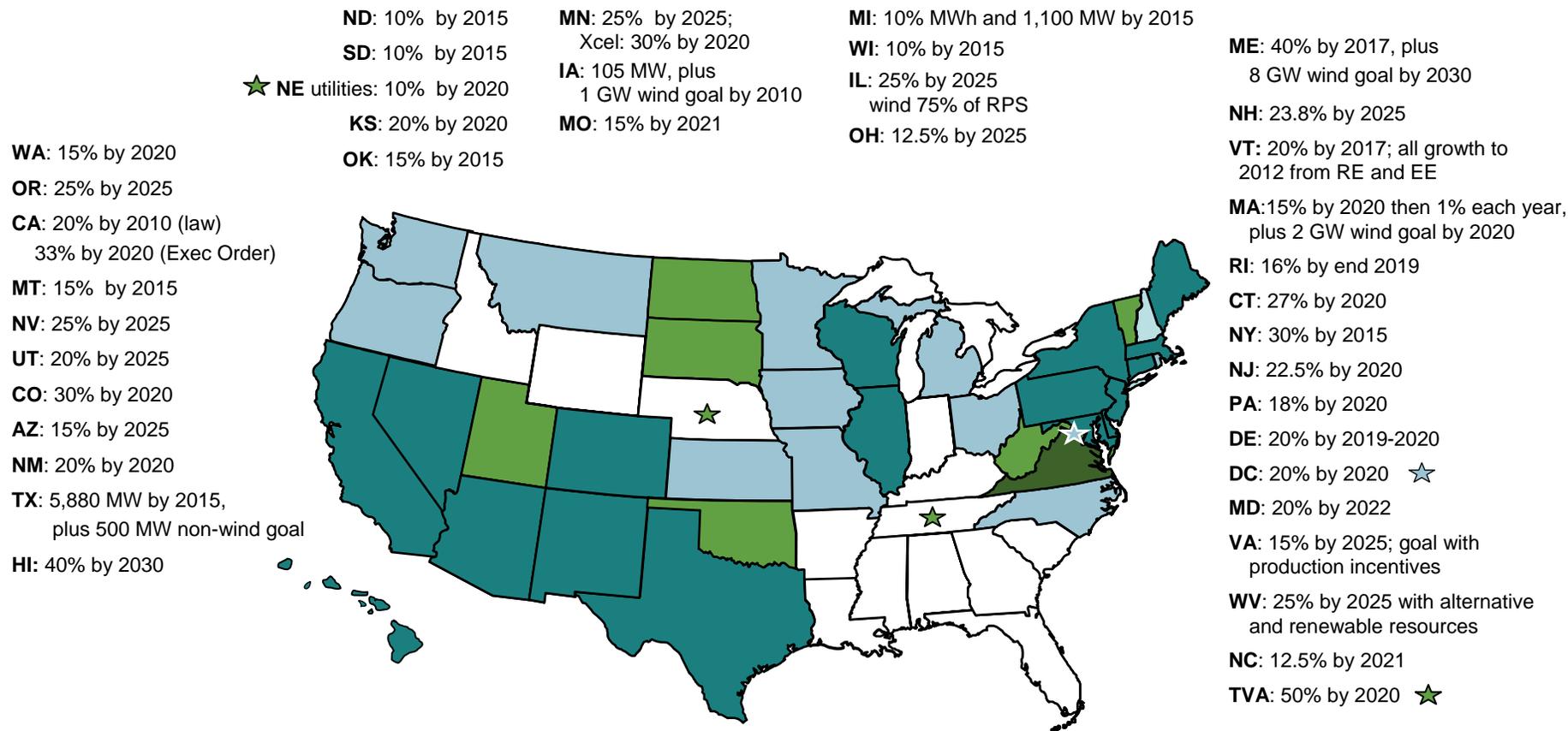
# Day Ahead On-Peak Congestion Average Monthly Prices June 2010



## Renewable Power & Energy Efficiency Market: Renewable Portfolio Standards

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

### 30 States including D.C. have Renewable Energy Portfolio Standards (RPS)



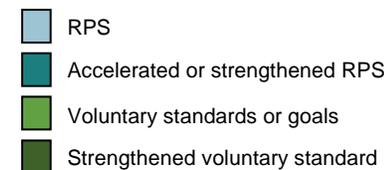
Updates at: <http://www.ferc.gov/market-oversight/othr-mkts/renew.asp>

**Notes:** An RPS requires a percent of an electric provider's energy sales (MWh) or installed capacity (MW) to come from renewable resources. Most specify sales (MWh). Map percents are final years' targets. Alaska has no RPS.

\* Nebraska does not have a state-wide goal, but its two largest public power districts do.

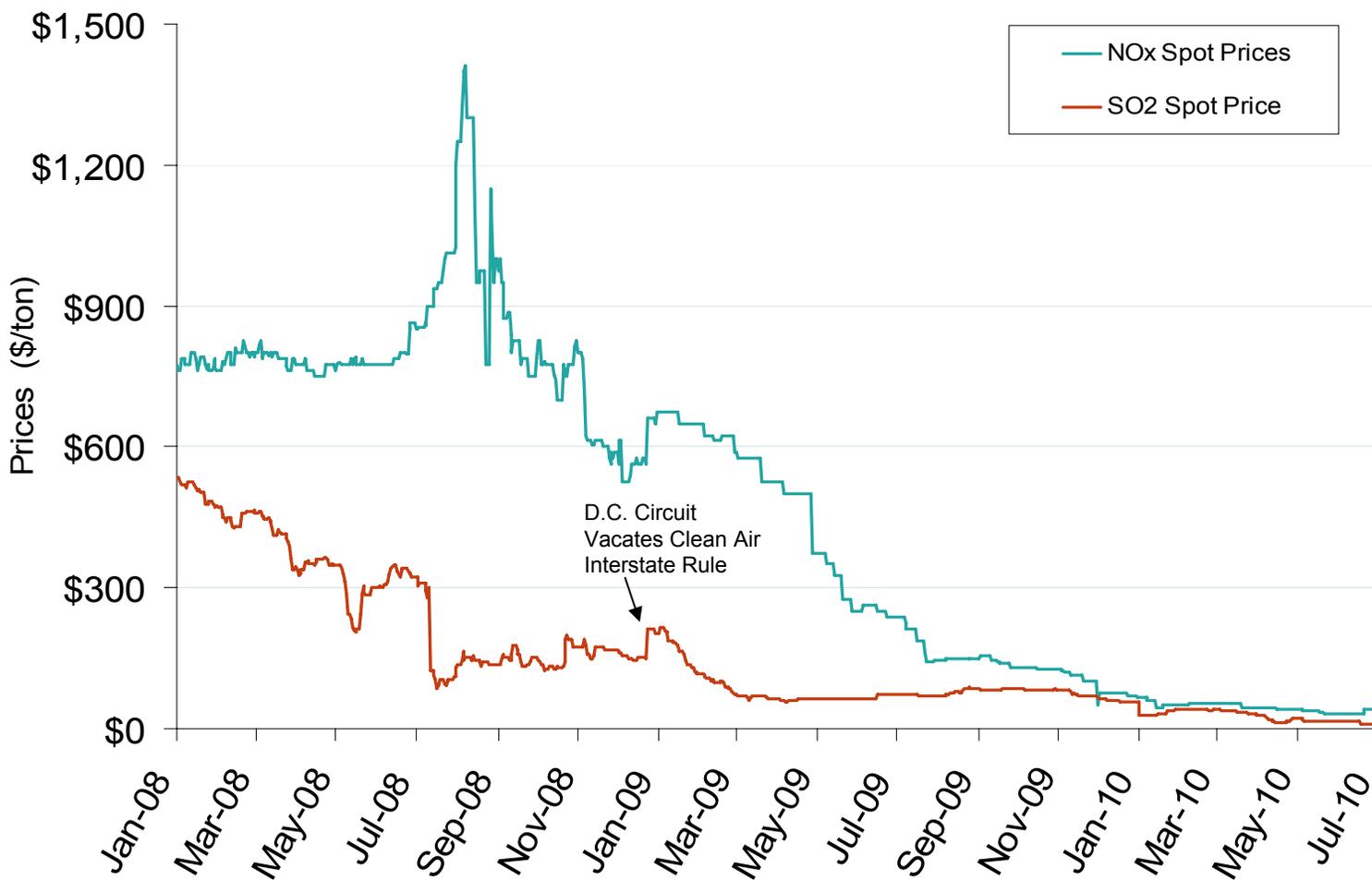
TVA's goal is not state policy; it calls for 50% zero- or low-carbon generation by 2020.

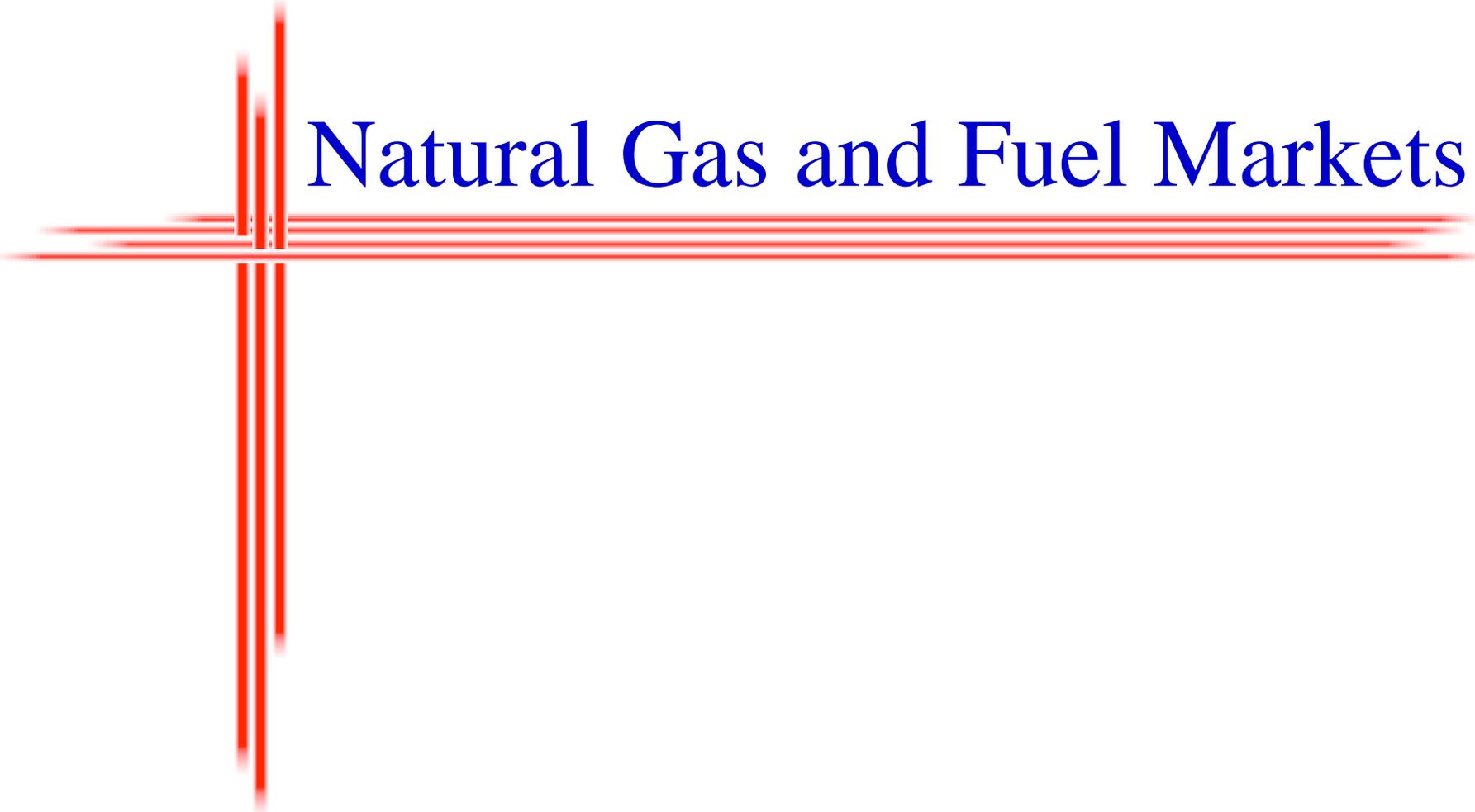
**Sources:** Derived from data in: LBNL, PUCs, State legislative tracking services, Pew Center. Details, including timelines, are in the Database of State Incentives for Renewables and Energy Efficiency: <http://www.dsireusa.org>



Updated June 29, 2010

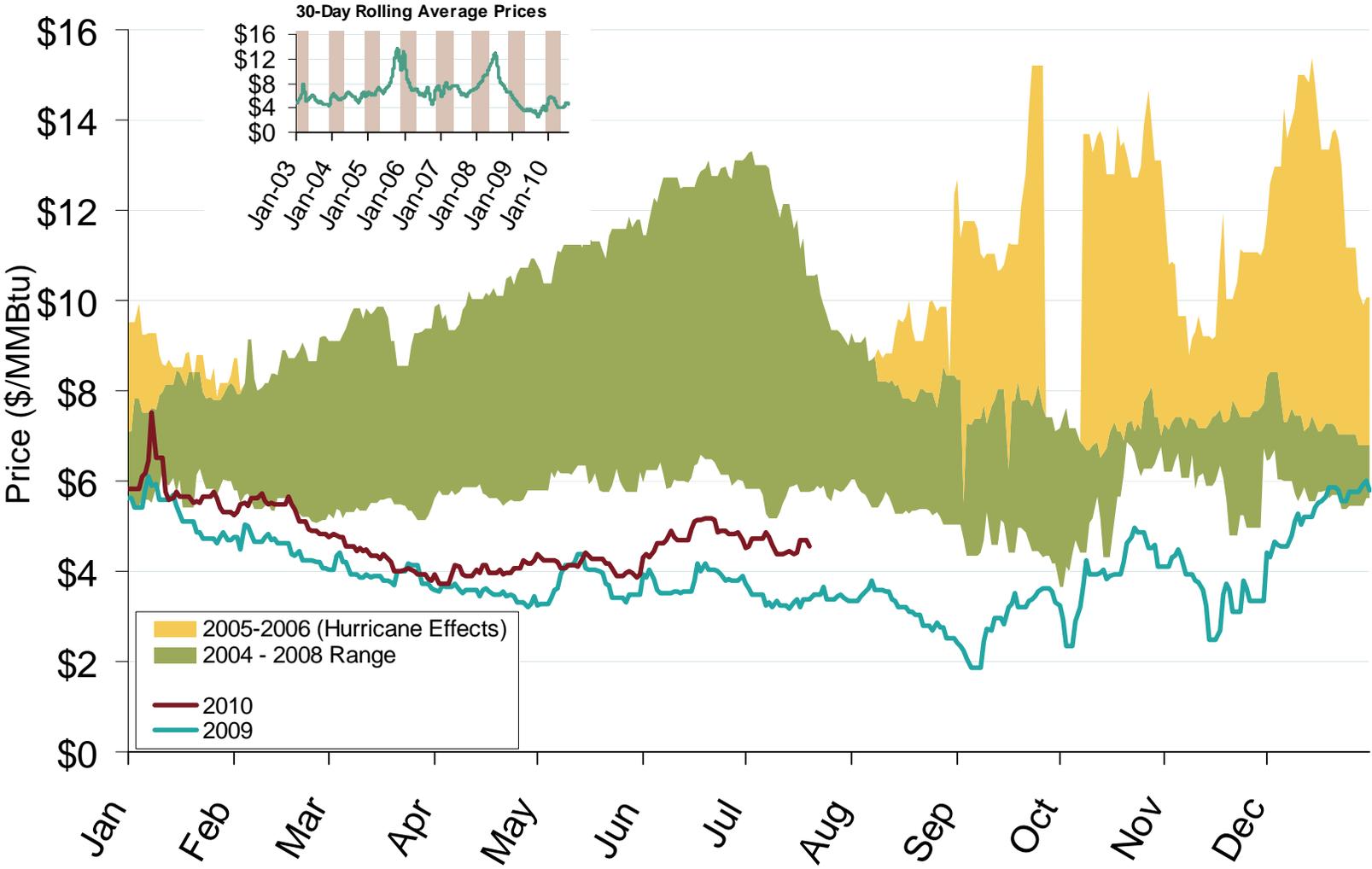
## SO<sub>2</sub> Allowance Spot Prices and NOx Seasonal Allowance Spot Prices





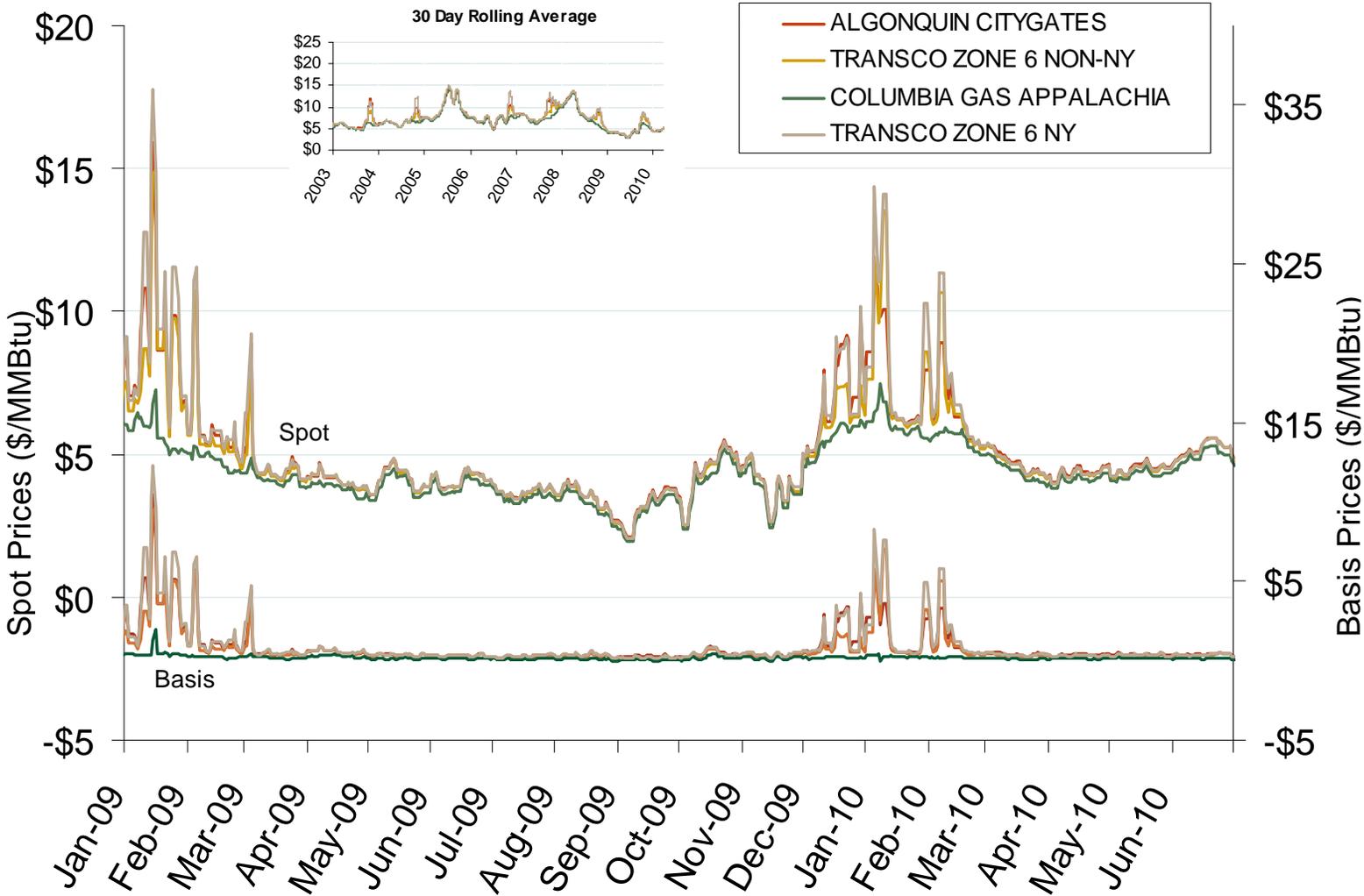
# Natural Gas and Fuel Markets

# Henry Hub Natural Gas Daily Spot Prices



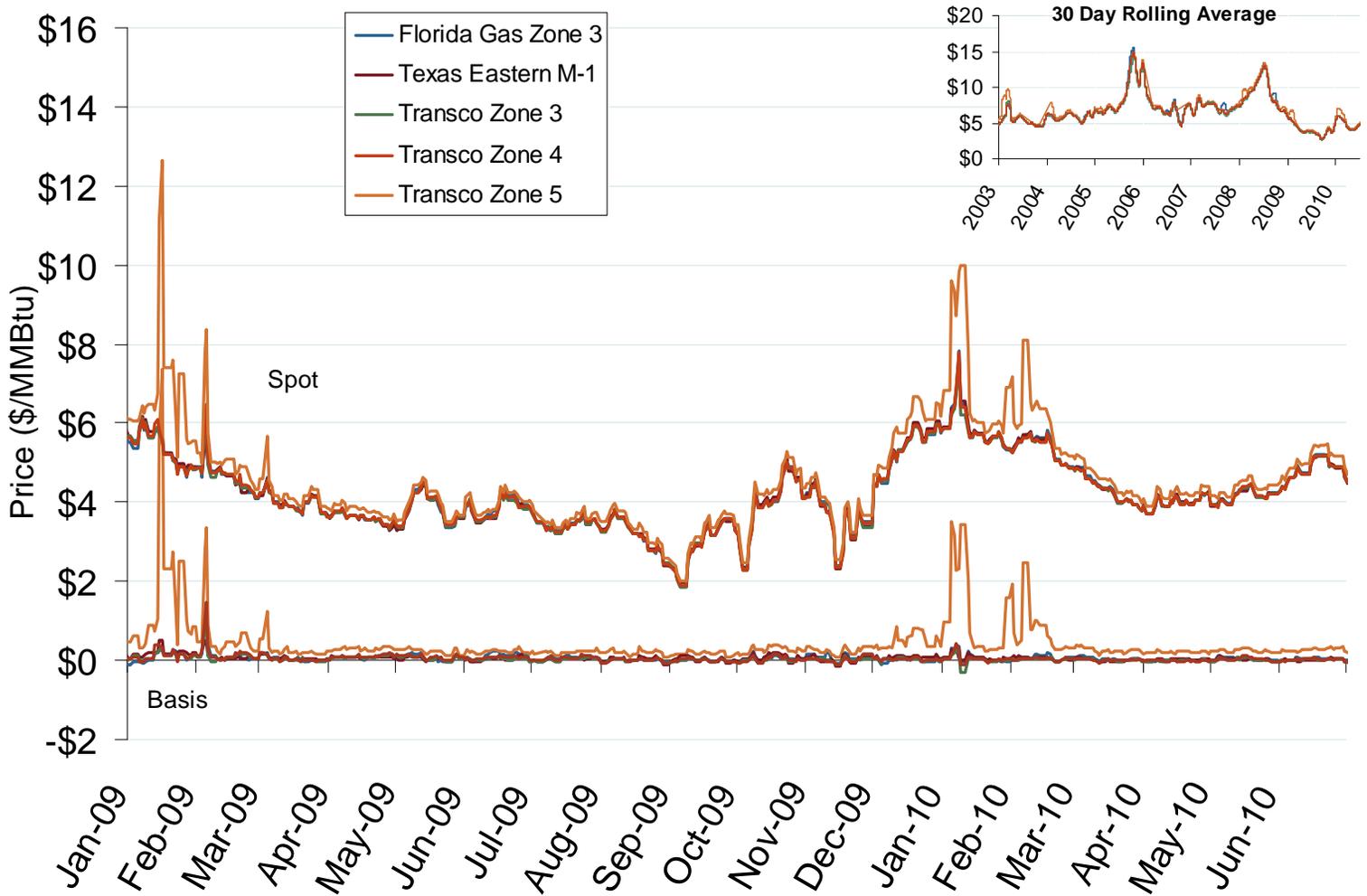
Source: Derived from *Platts* data.  
July 2010 National Snapshot Report

# Northeastern Spot Prices and Basis



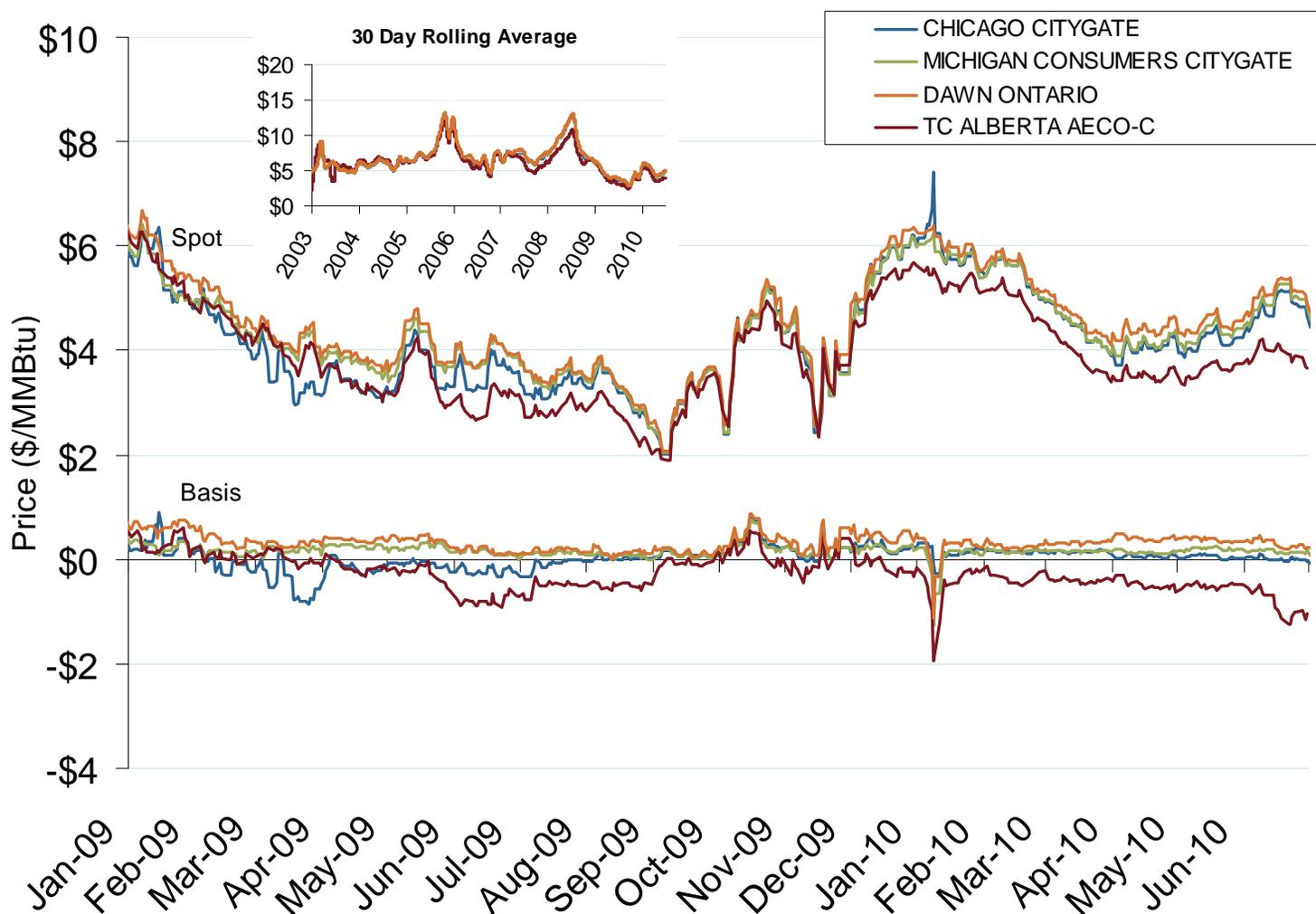
Source: Derived from Platts data.

# Southeastern Day-Ahead Hub Spot Prices and Basis

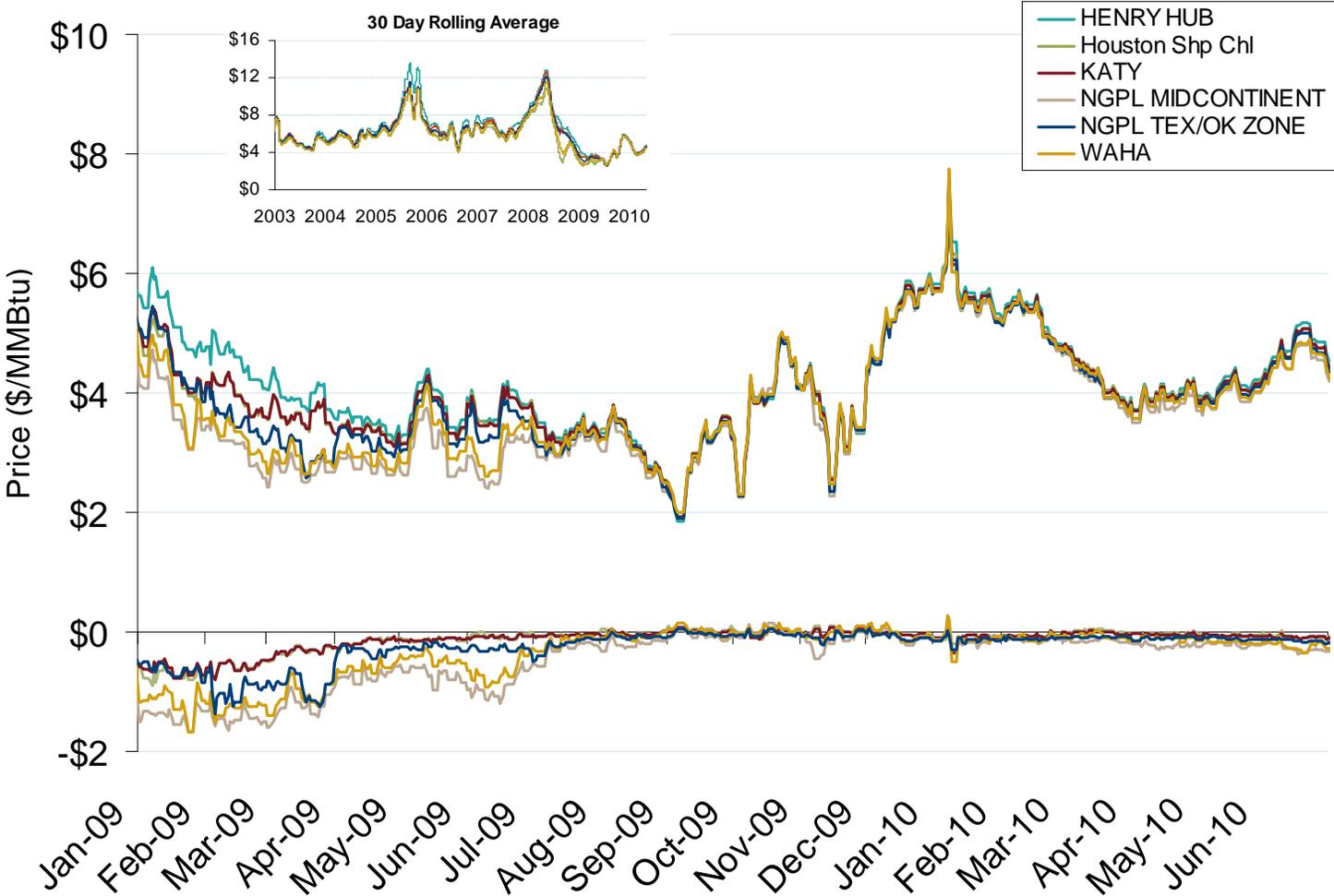


Source: Derived from *Platts* data.

## Midwestern Day-Ahead Hub Spot Prices and Basis

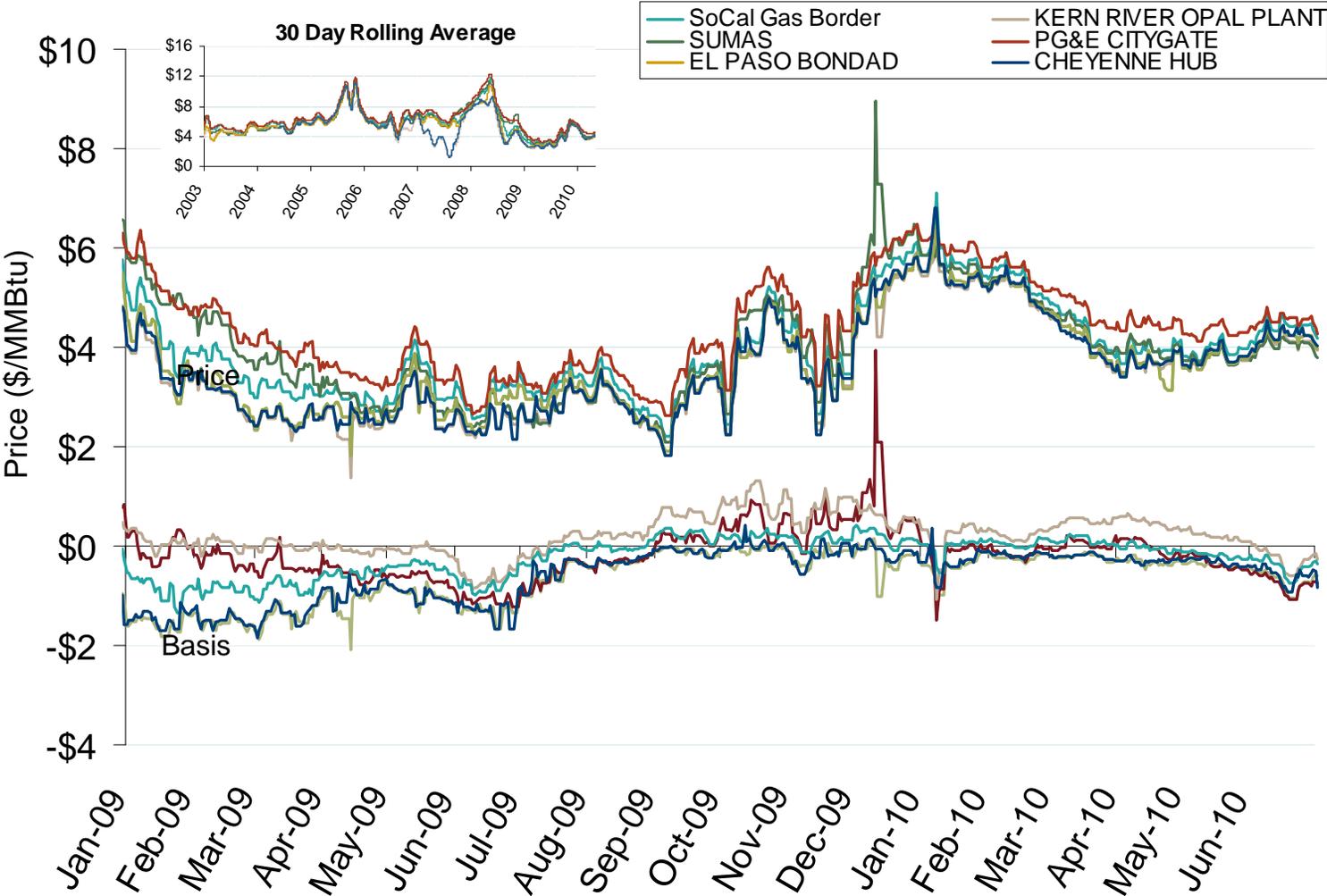


# Gulf Day-Ahead Hub Spot Prices and Basis



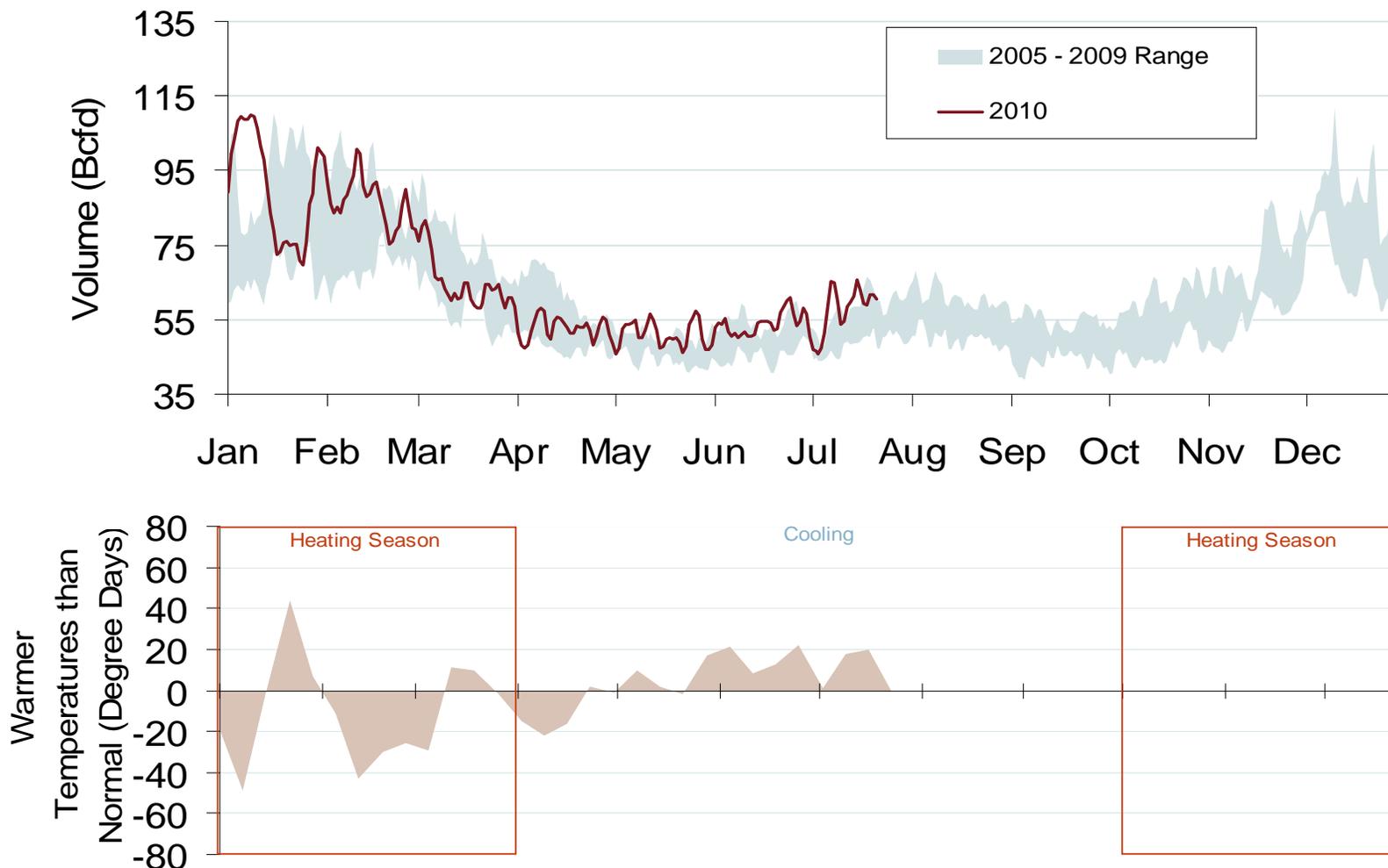
Source: Derived from *Platts* data.

# Western Day-Ahead Hub Spot Prices and Basis

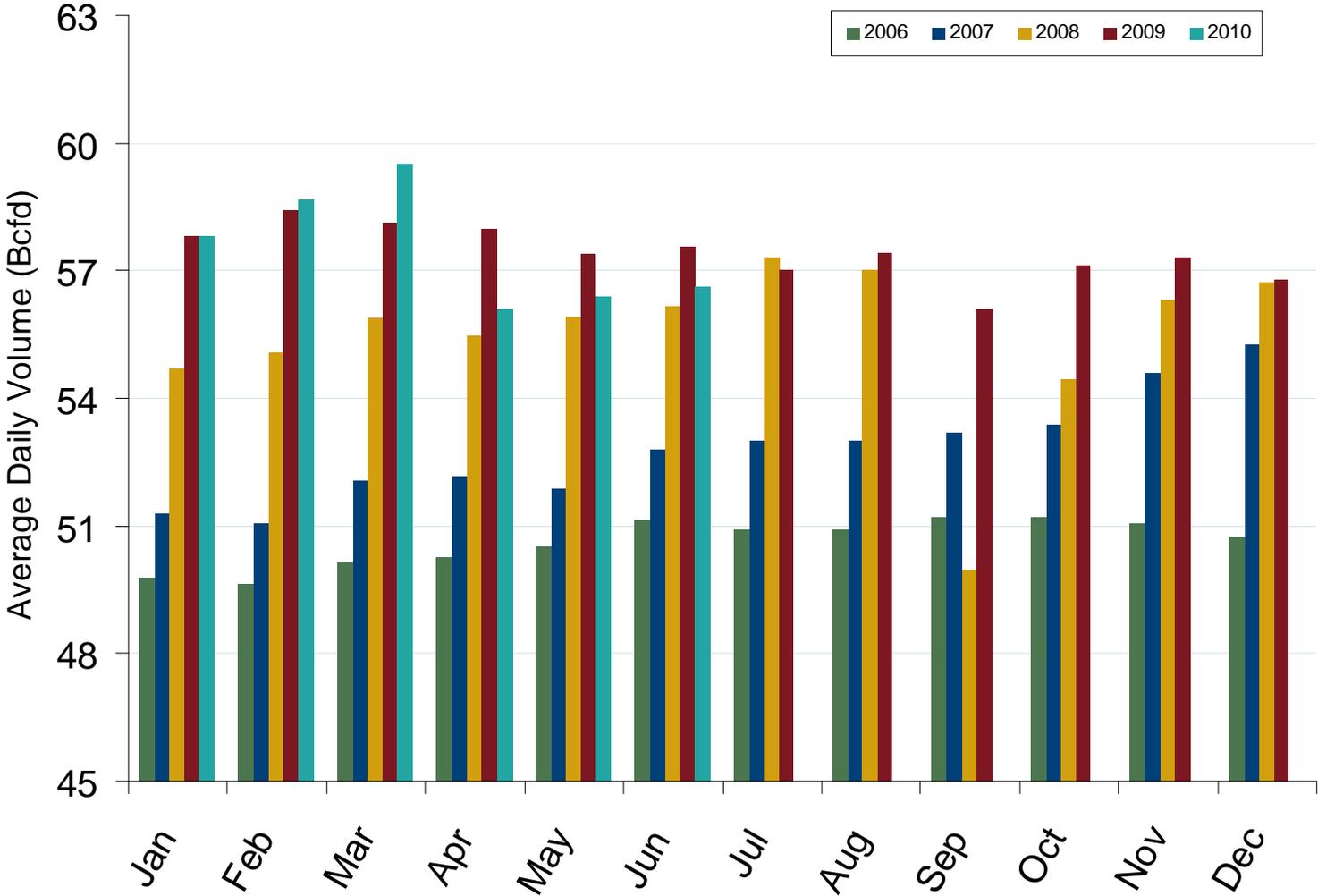


Source: Derived from *Platts* data.

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



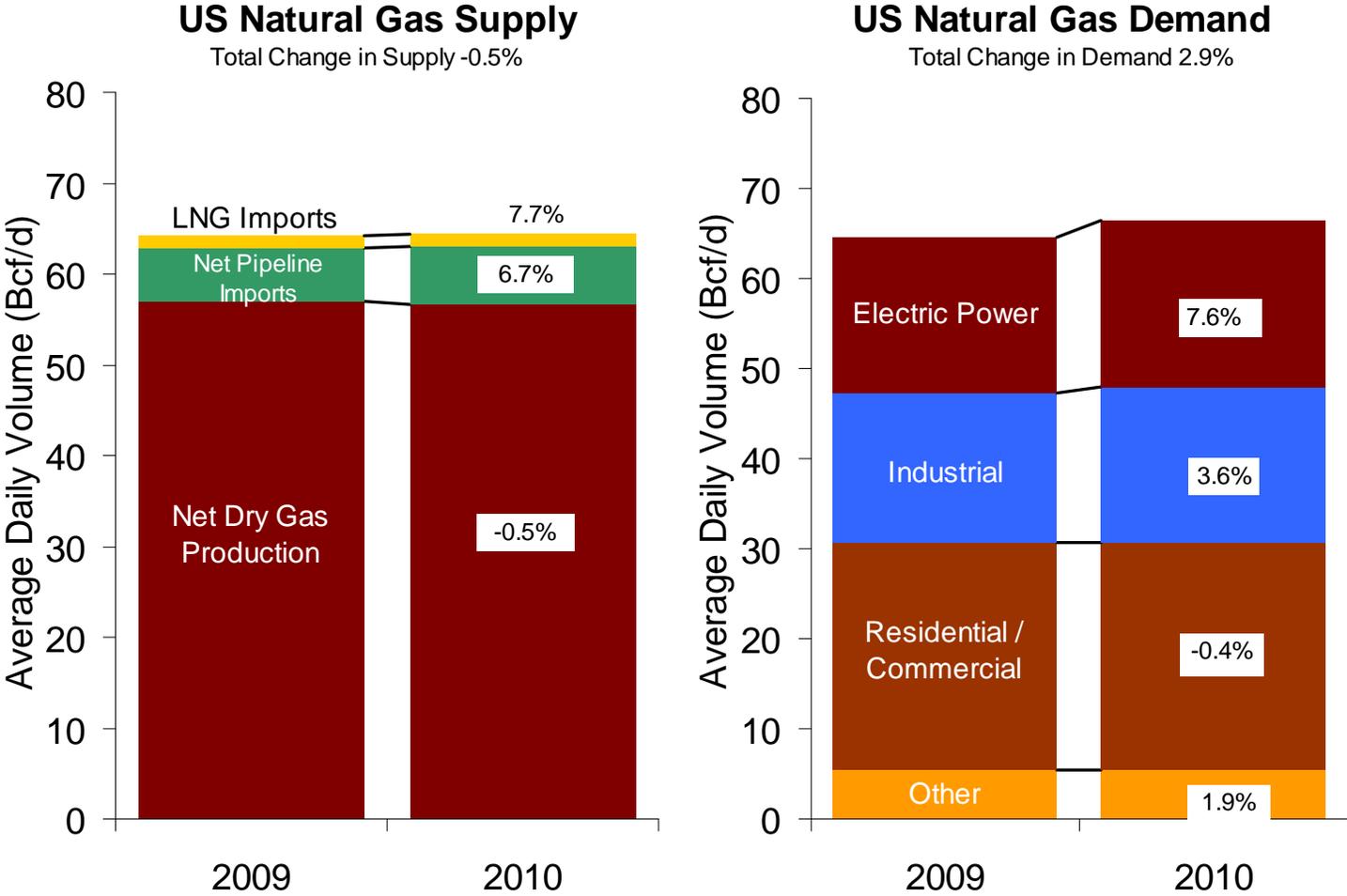
# U.S. Dry Gas Production



Source: Derived from EIA and Bentek data.  
July 2010 National Snapshot Report

Updated July 9, 2010

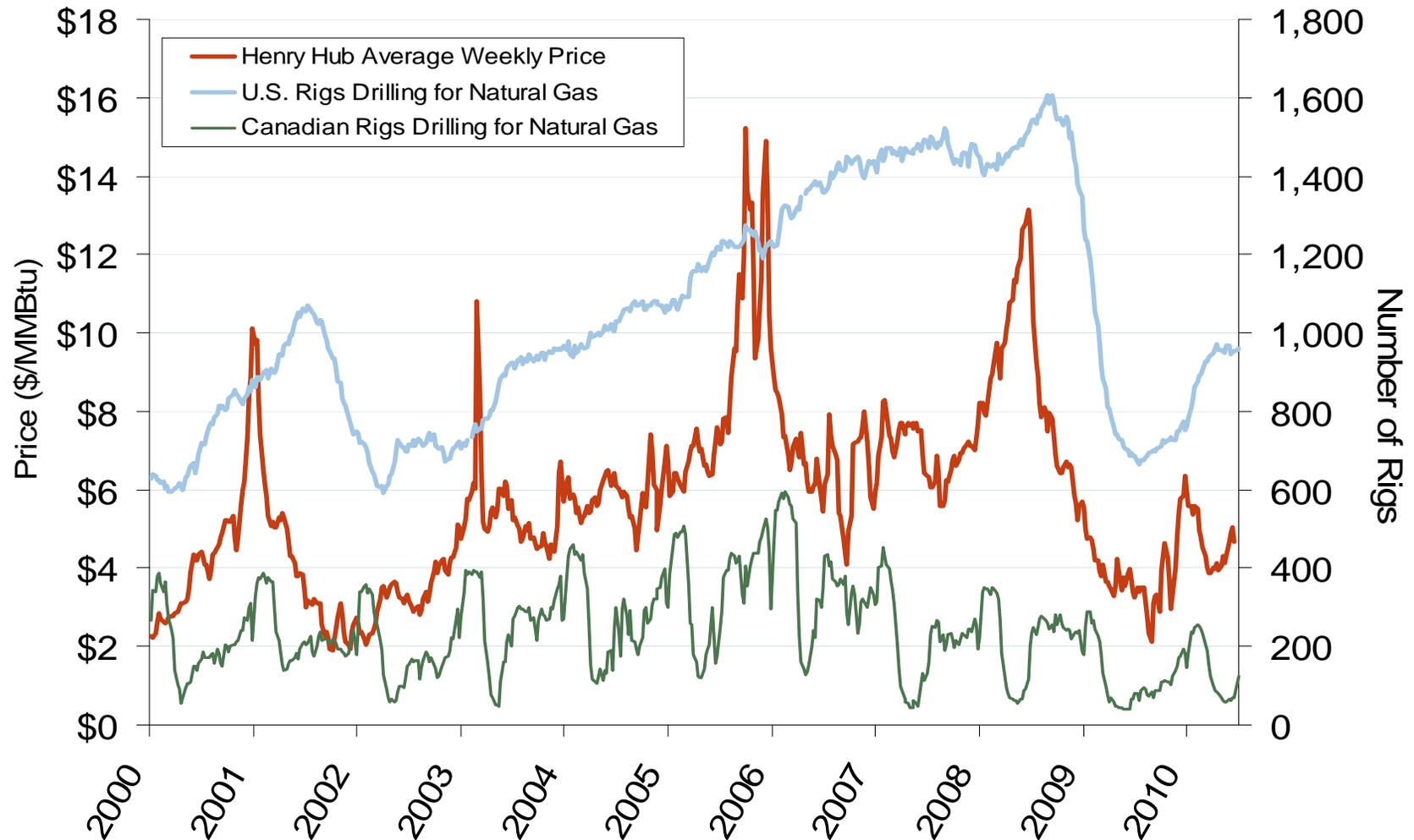
# U.S. Natural Gas Supply and Demand 2009 vs. 2010: January - June



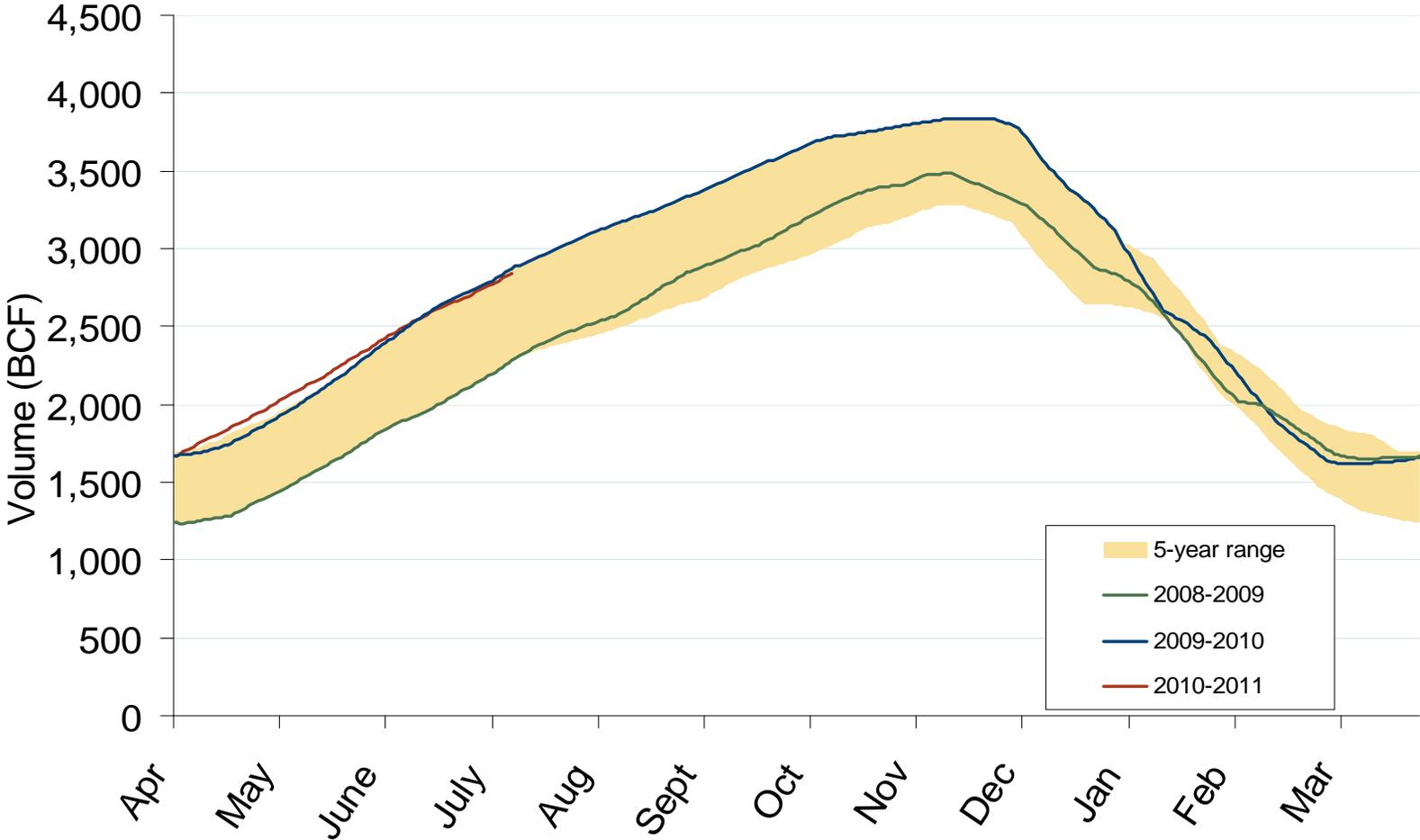
Source: Derived from Bentek data.  
July 2010 National Snapshot Report

Updated July 9, 2010

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



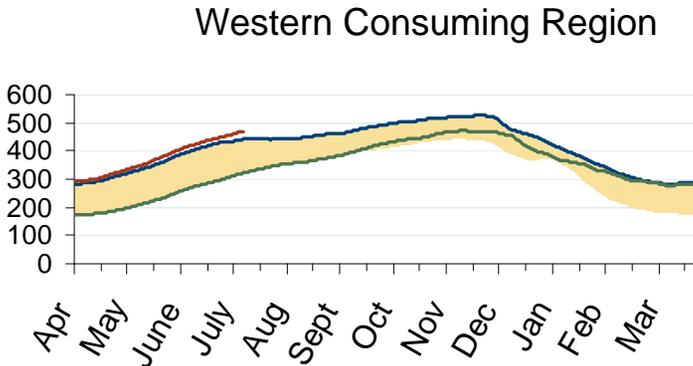
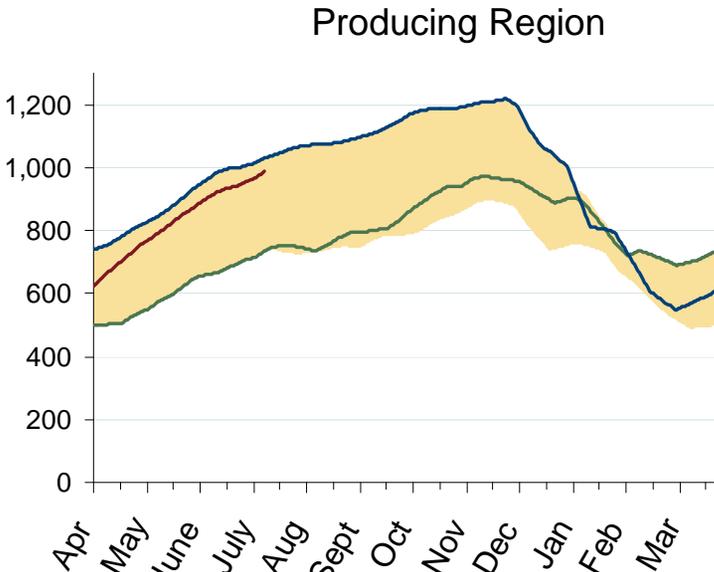
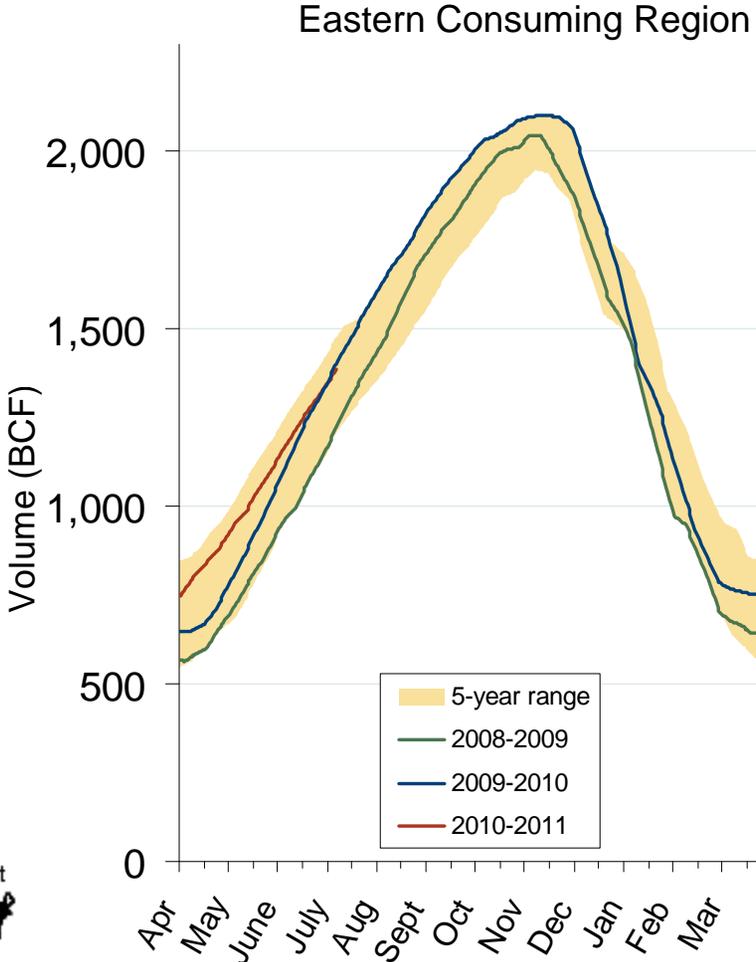
# Total U.S. Working Gas in Storage



Source: Derived from EIA data.  
July 2010 National Snapshot Report

Updated July 15, 2010

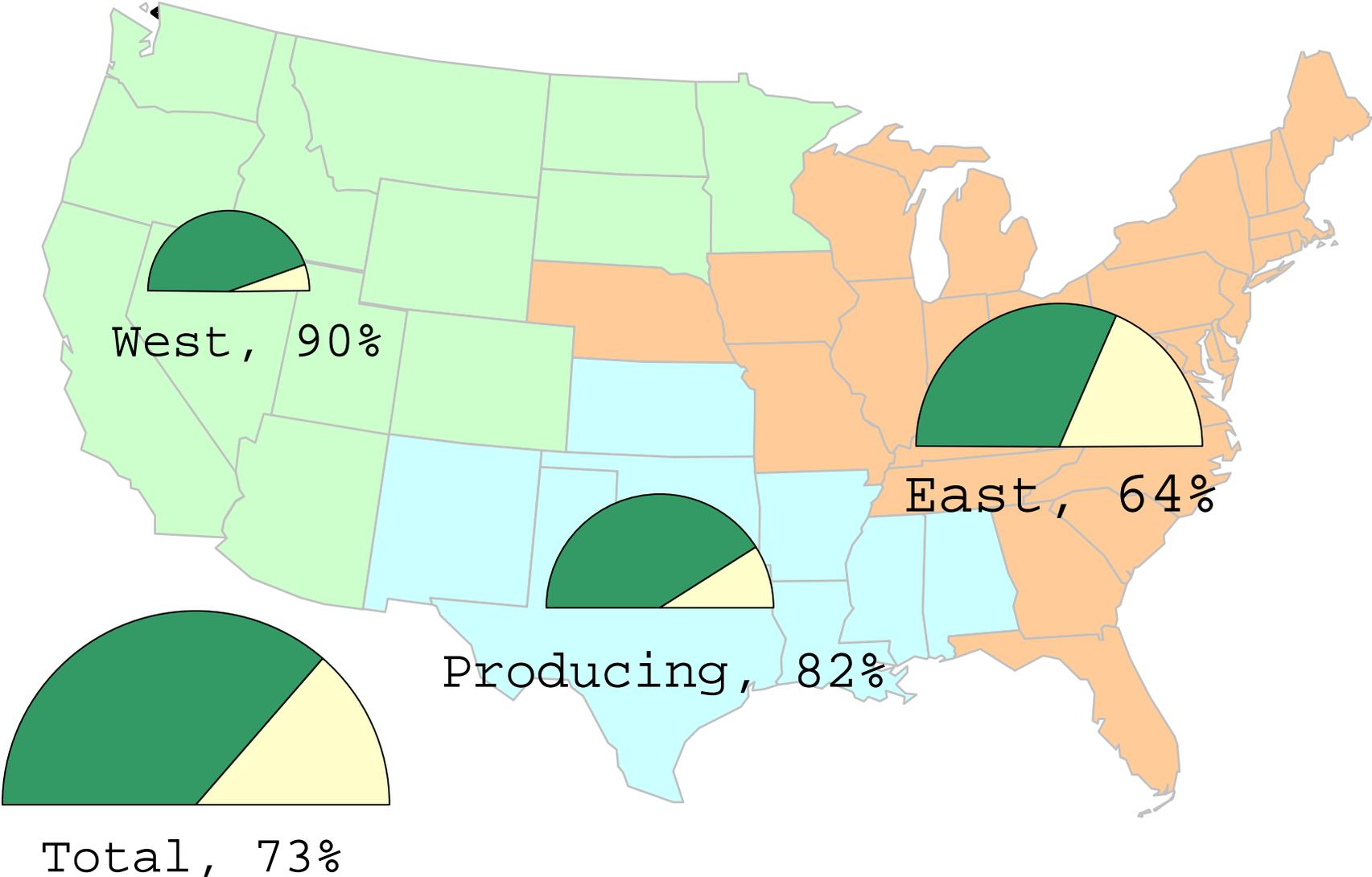
# Regional Totals of Working Gas in Storage



Source: Derived from EIA data.  
July 2010 National Snapshot Report

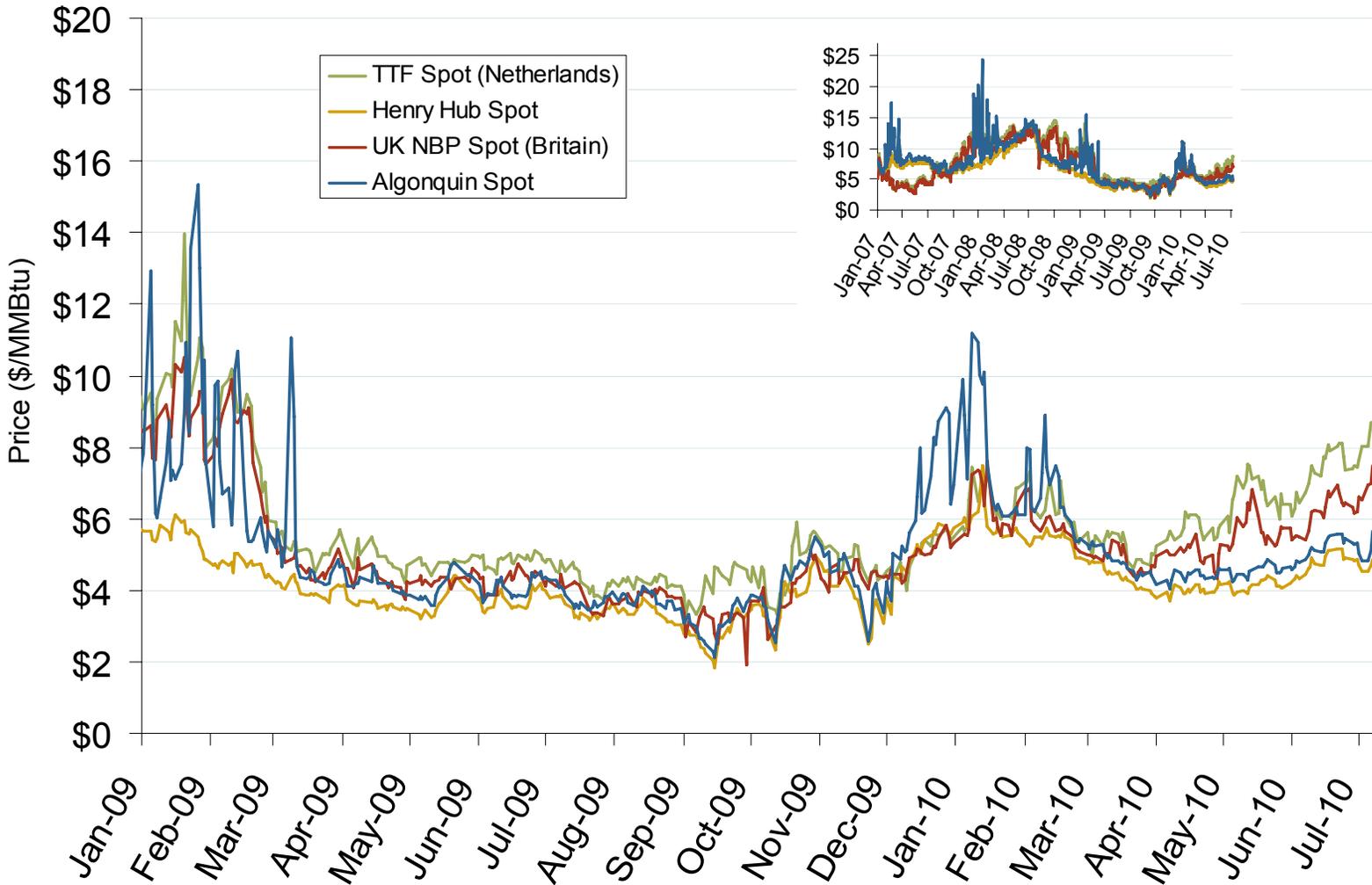
Updated July 15, 2010

# Natural Gas Storage Inventories – % full on July 9, 2010



Source: Derived from EIA Weekly Storage Report and the 2009 Estimated Peak Underground Working Gas Storage Capacity. Updated July 15, 2010 20022  
July 2010 National Snapshot Report

# Atlantic Basin European and US Spot Natural Gas Prices



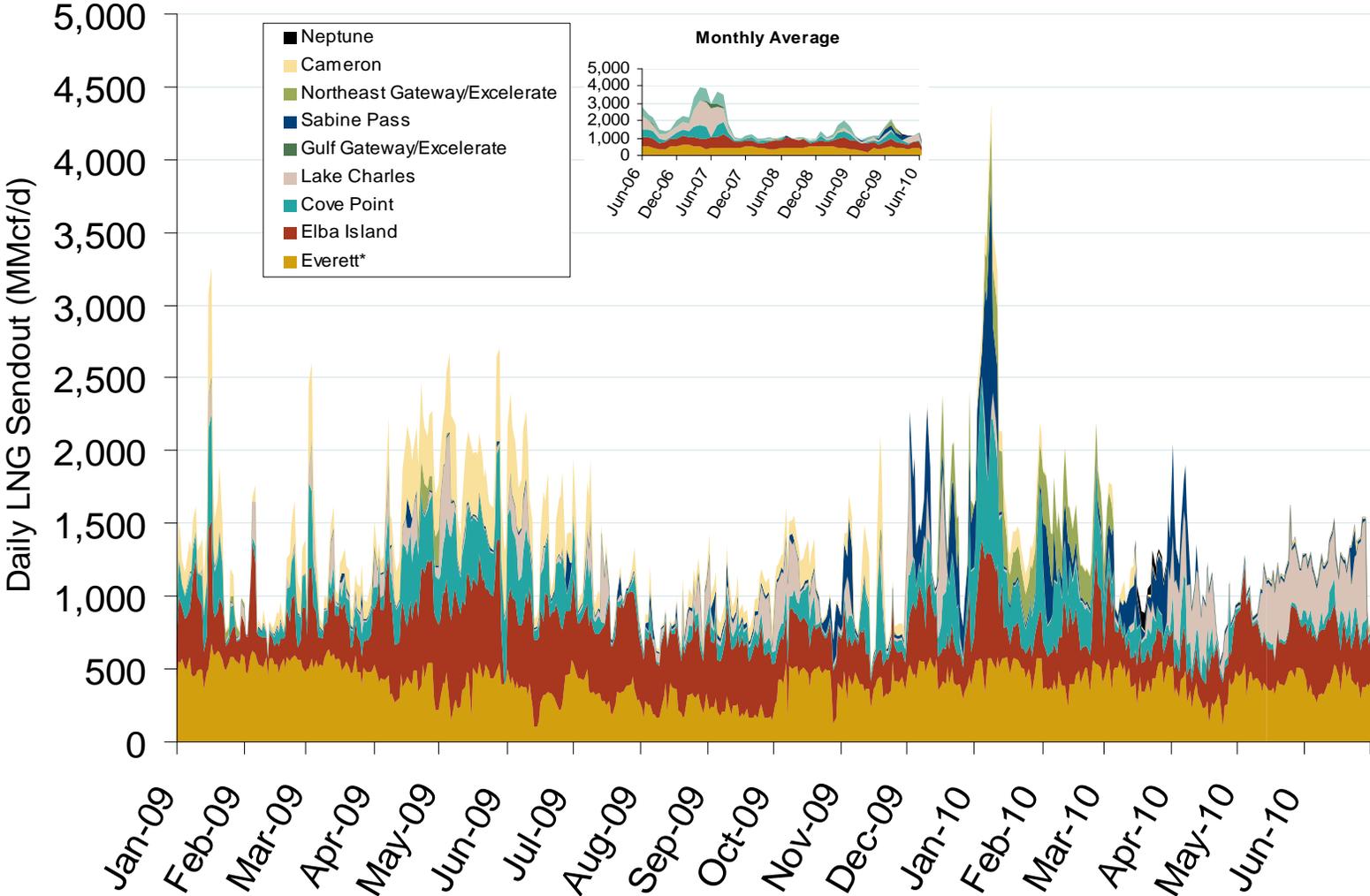
Source: Derived from *Bloomberg* and *ICE* data.  
July 2010 National Snapshot Report

Updated July 9, 2010

## World LNG Estimated July 2010 Landed Prices



# Daily Gas Sendout from Existing U.S. LNG Facilities

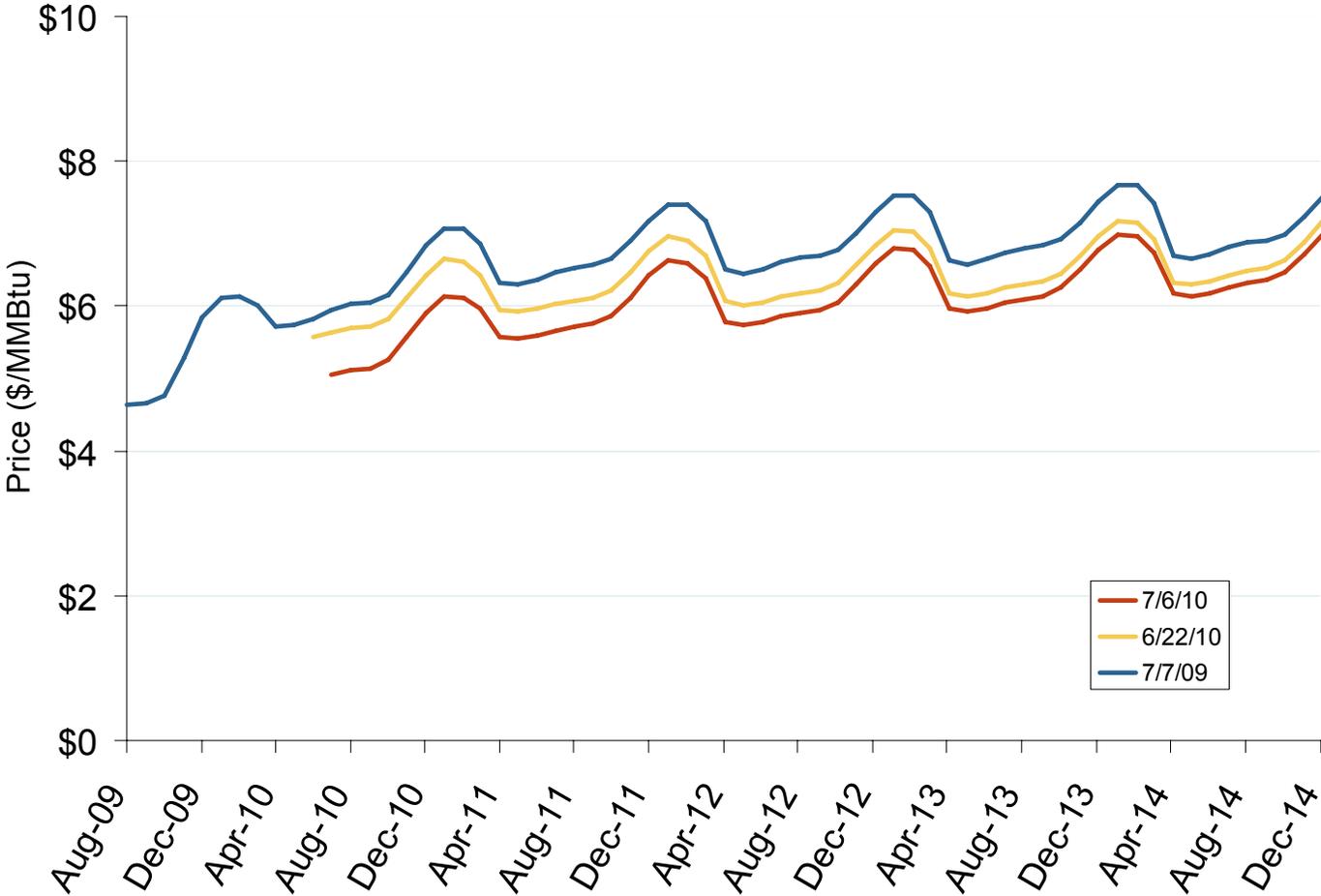


Source: Derived from *Bentek* data.

\* 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 July 9, 2010

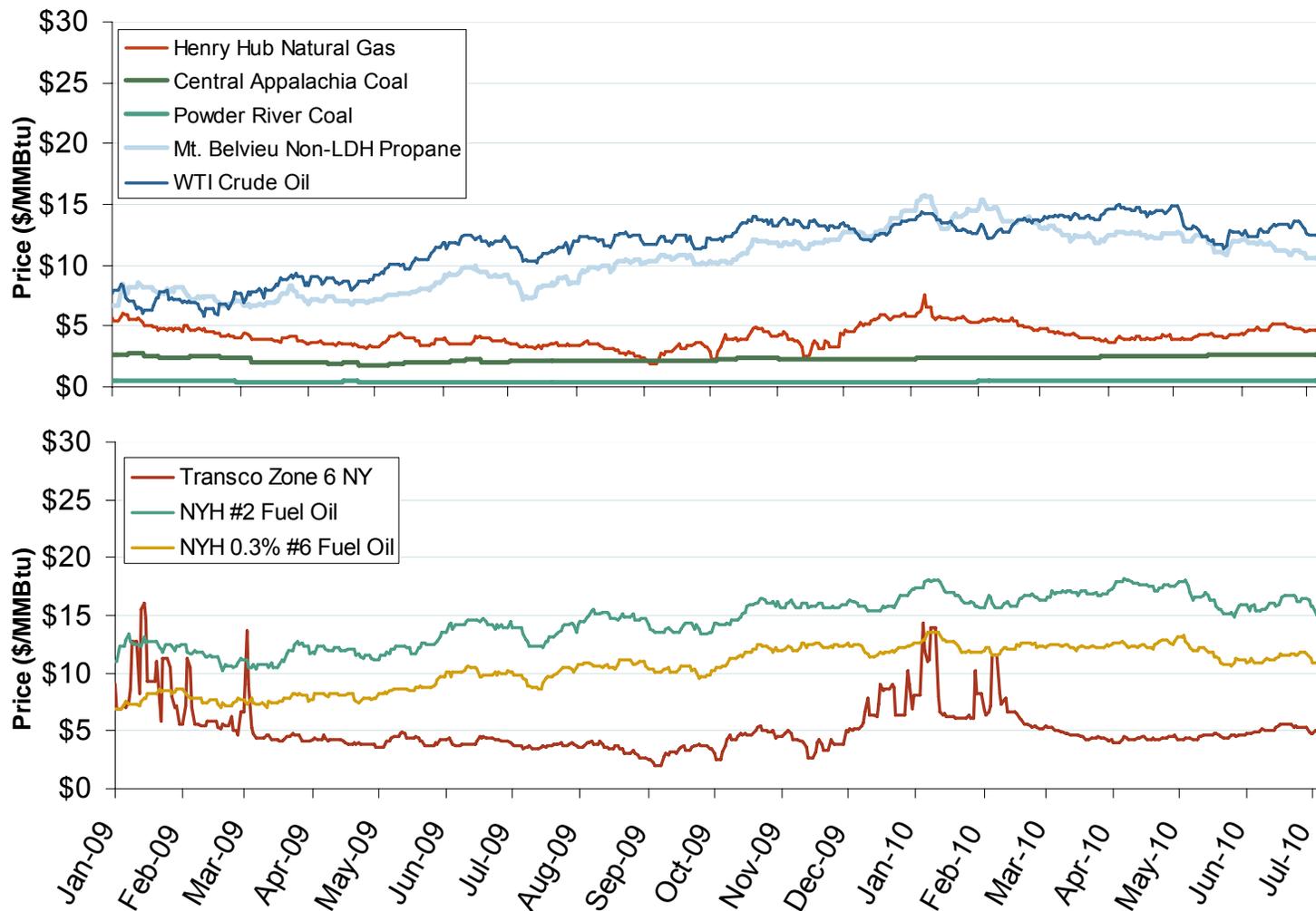
# NYMEX Natural Gas Forward Price Curve



The NYMEX futures contract trades in 10,000 million Btu units. The blue series shows the forward price curve for these contracts 1-year ago. The red and yellow curves show prices for contracts traded on the current and previous months.

Source: Derived from NYMEX data.

## Oil, Coal, Natural Gas and Propane Daily Spot Prices

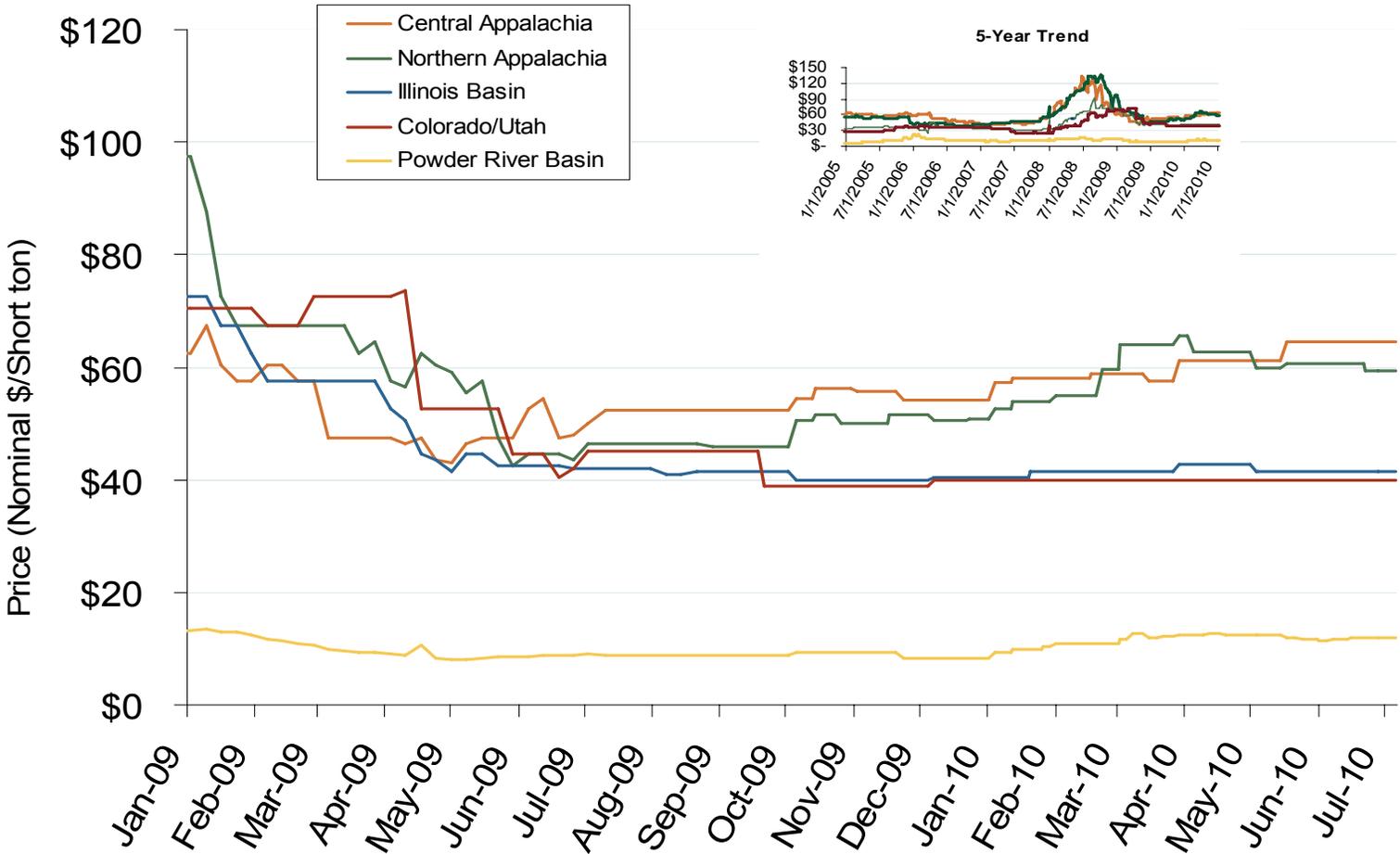


Source: Derived from *ICE* and *Bloomberg* data.

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.

Updated July 9, 2010

# Regional Coal Spot Prices

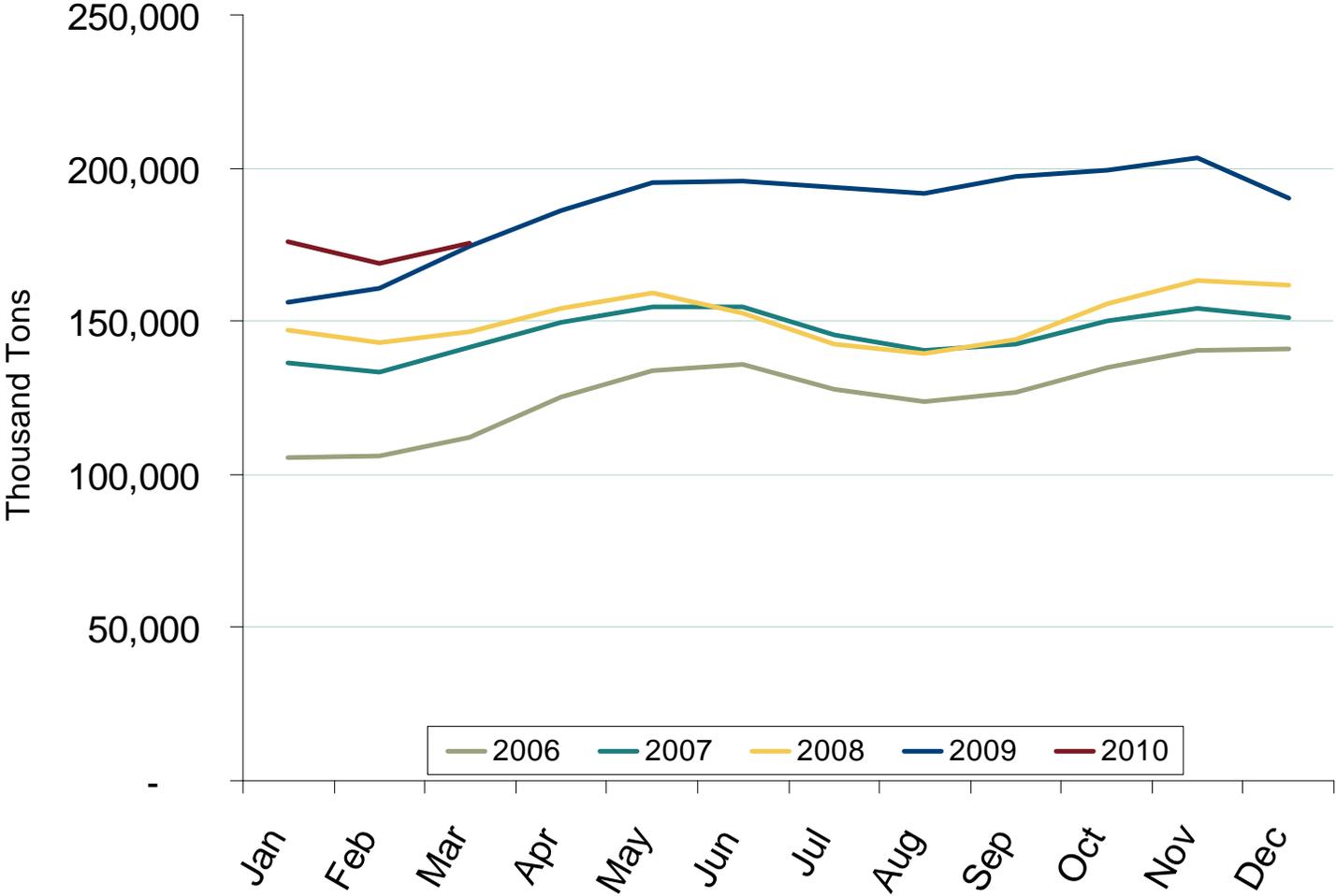


Note: the Central Appalachian (CAPP) coal is priced at Big Sandy. All others are mine mouth prices. Prices do not include transportation costs to a plant, as those can vary widely by contract specifications. Prices exclude incremental cost of emissions allowances.

Source: Derived from *Bloomberg* data.  
July 2010 National Snapshot Report

Updated July 9, 2010

# U.S. Coal Stockpiles at Electric Power Generating Facilities



Source: Energy Information Administration. Excludes Industrial and Commercial Plants.  
July 2010 National Snapshot Report

Updated July 9, 2010