

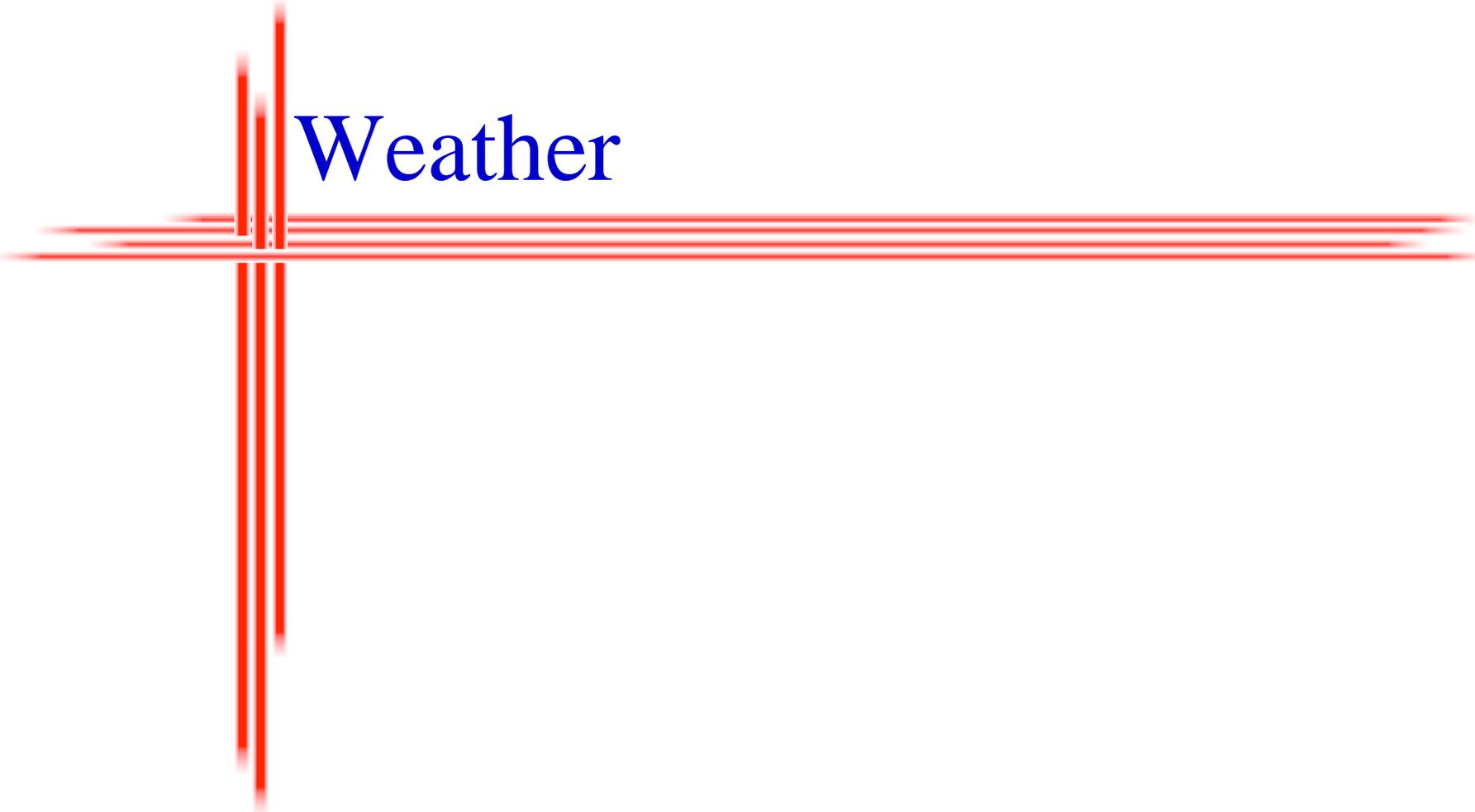
# OE ENERGY MARKET SNAPSHOT

## Western States Version – June 2011 Data

---

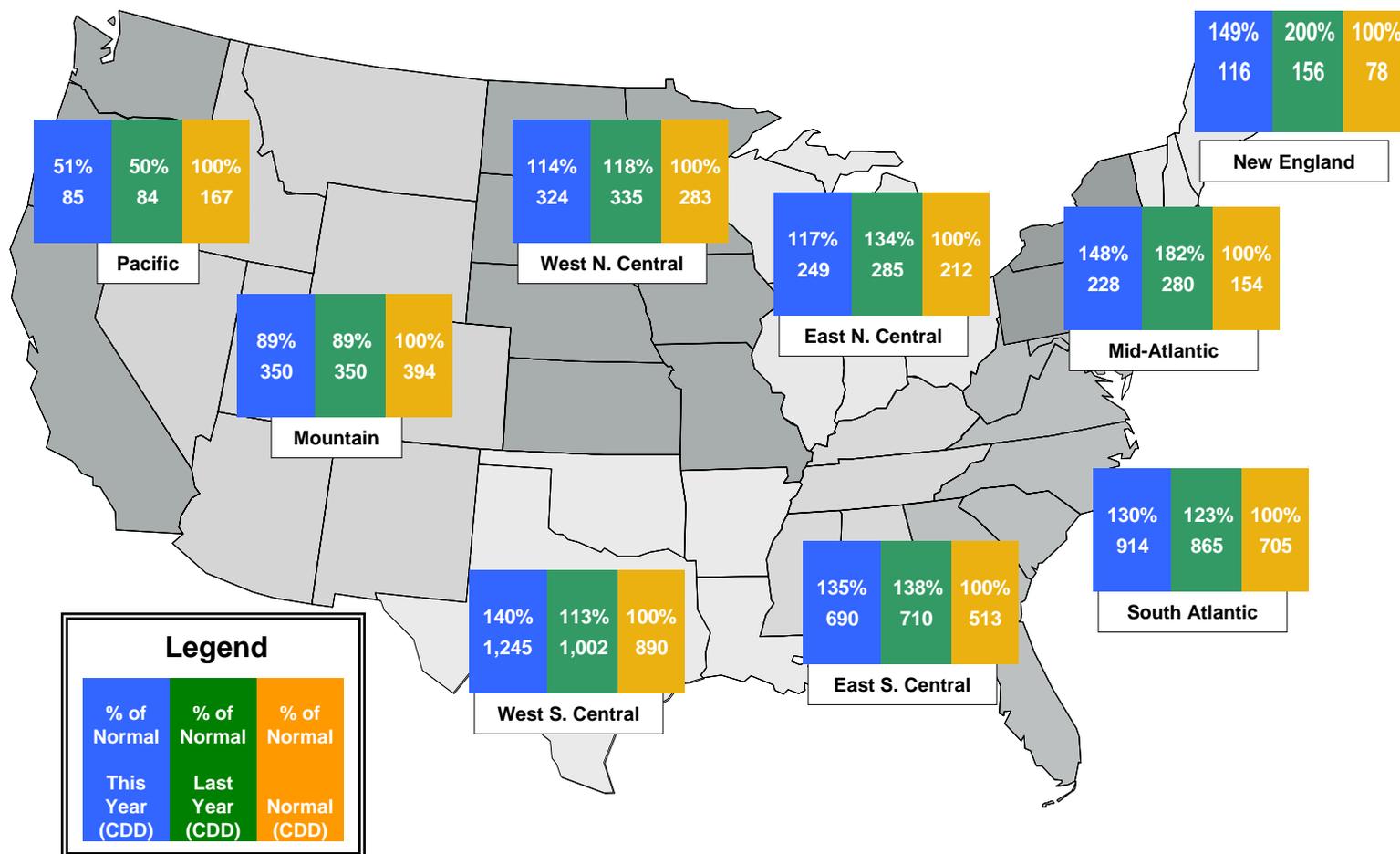
- **Weather**
- **Electricity Markets**
- **Natural Gas and Fuel Markets**

Office of Enforcement  
Federal Energy Regulatory Commission  
July 2011



# Weather

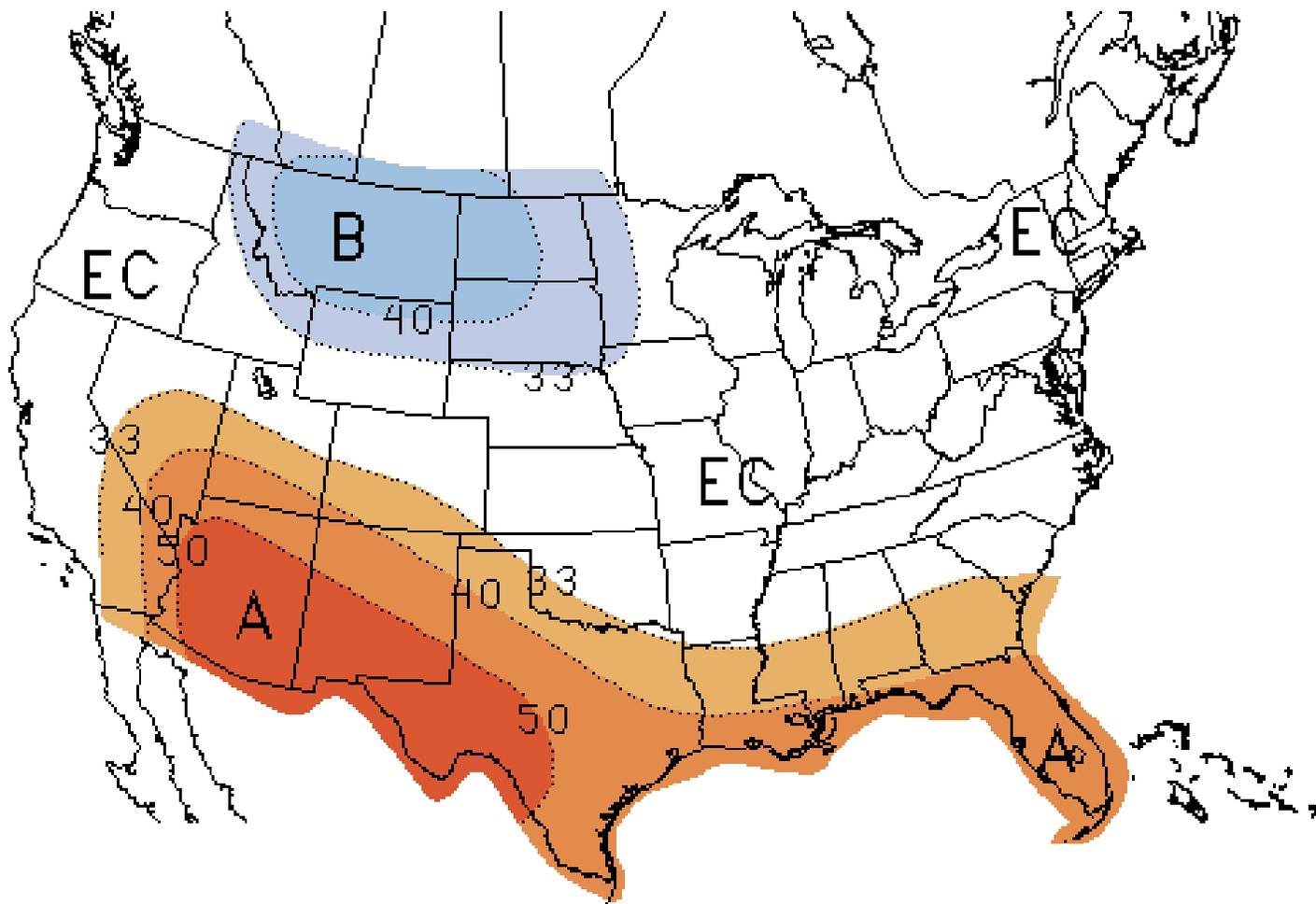
# Regional Cooling Degree Days January Through June 2011



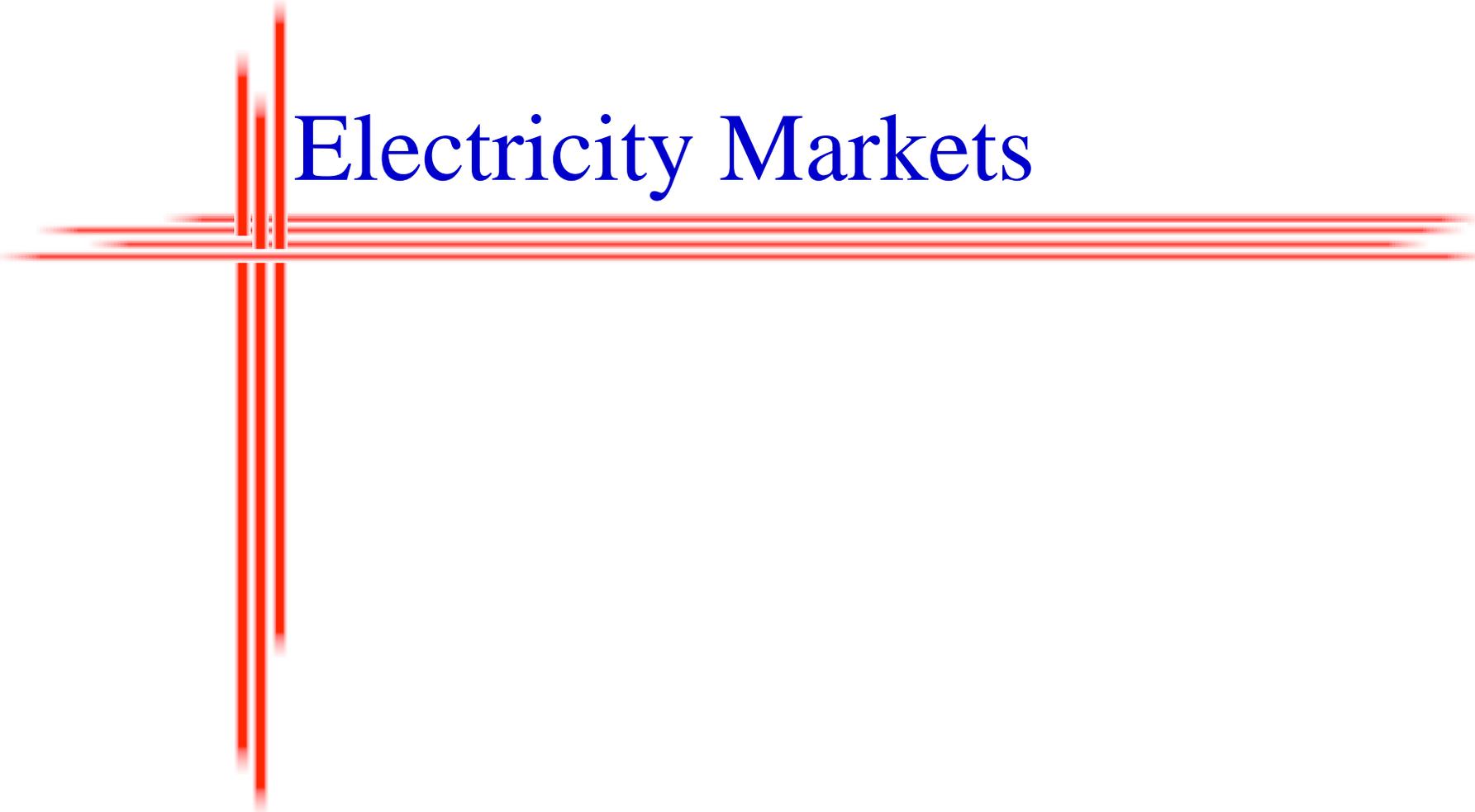
Source: Derived from NOAA data. Normal is based on a 30-year average of cooling degree day data.  
July 2011 Western Snapshot Report

Updated July 7, 2011

## NOAA's 3 Month Temperature Forecast Made June 16, 2011, Valid for July – Sep 2011

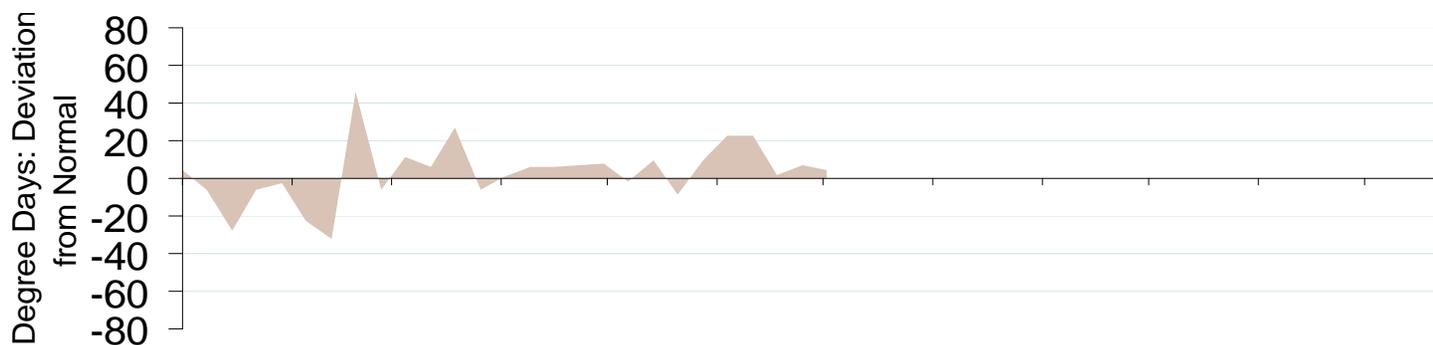
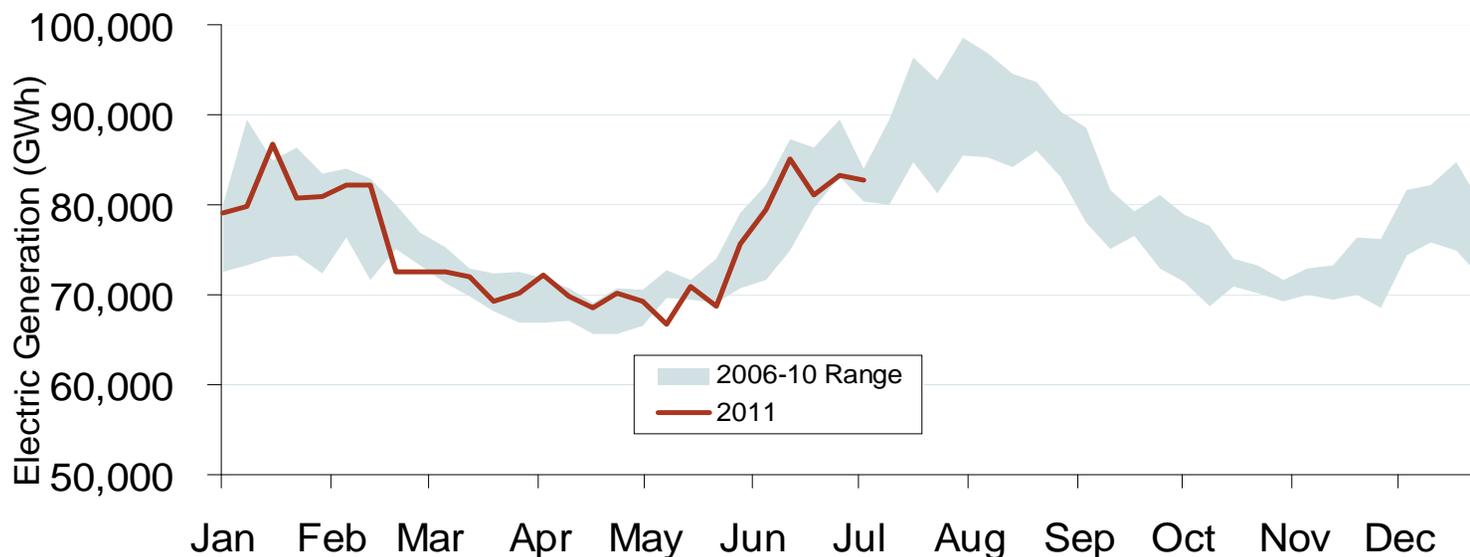


Note: "A" areas are above normal, "B" areas are below normal and "EC" means equal chance. Normal is based on the last 30 years of data.  
Source: Derived from NOAA data.



# Electricity Markets

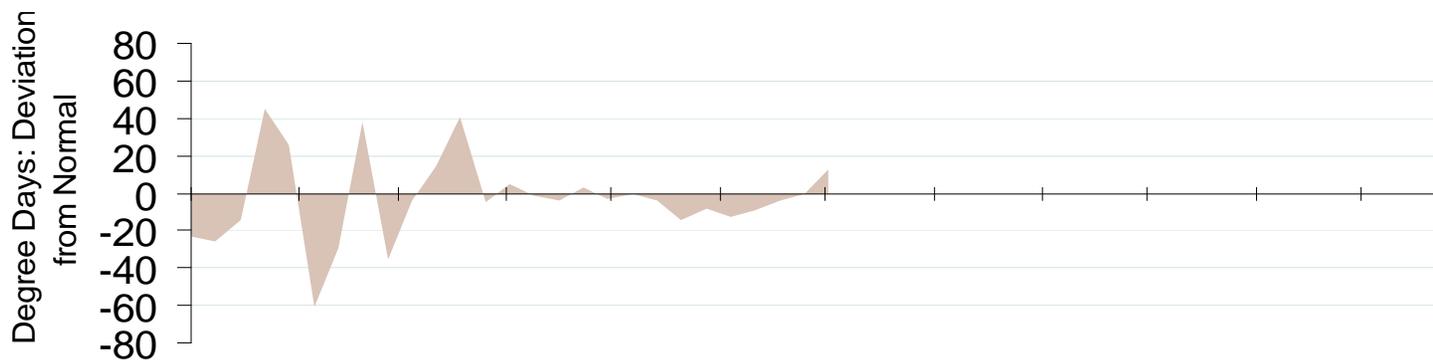
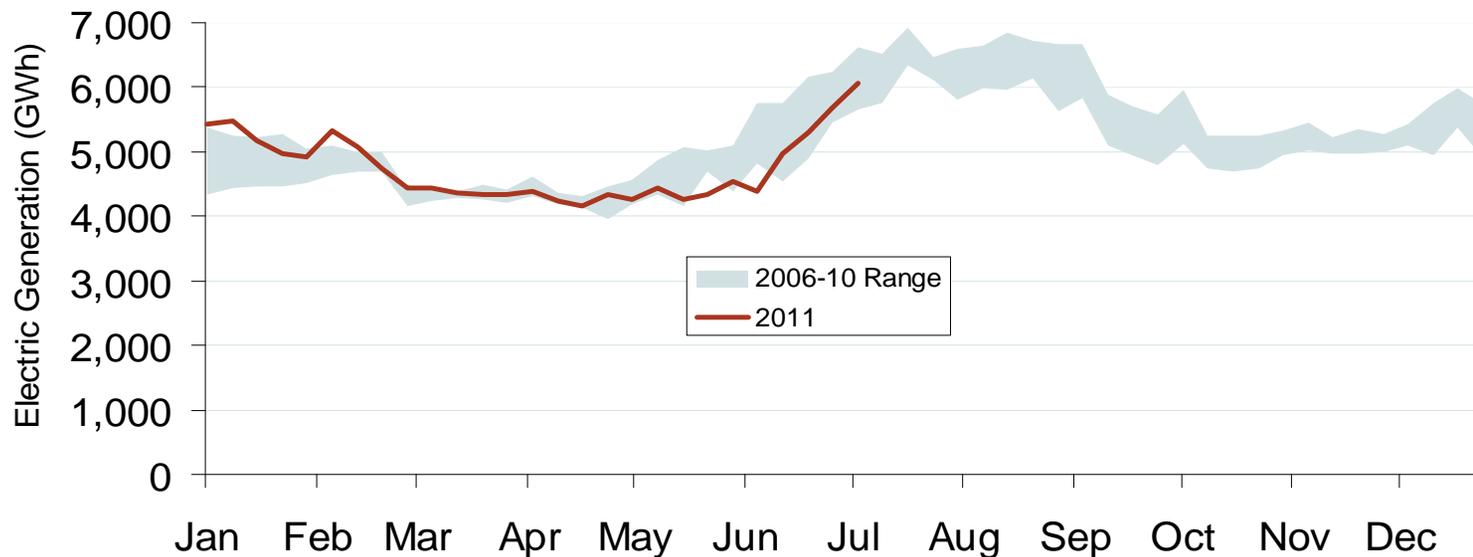
## Weekly U.S. Electric Generation Output and Temperatures



Source: Derived from *EI* and *NOAA* data.

Updated: July 08, 2011

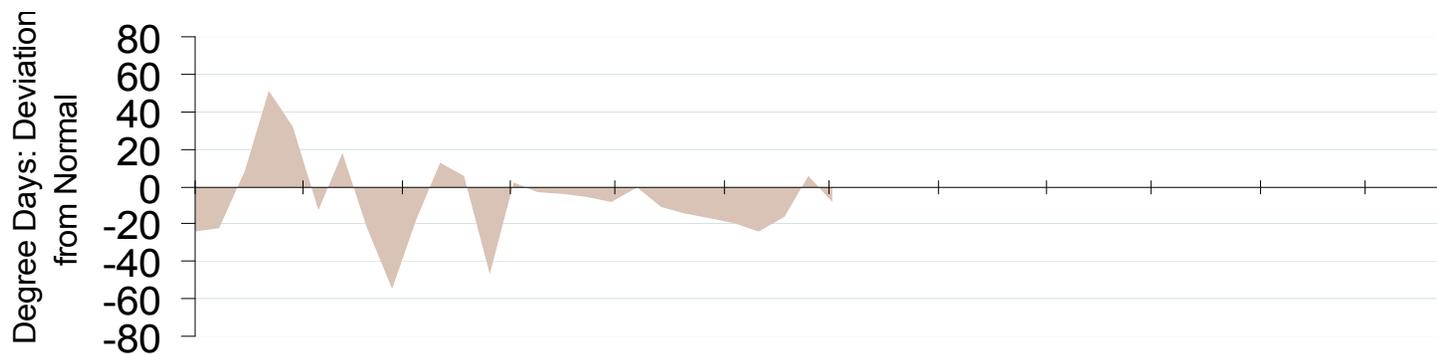
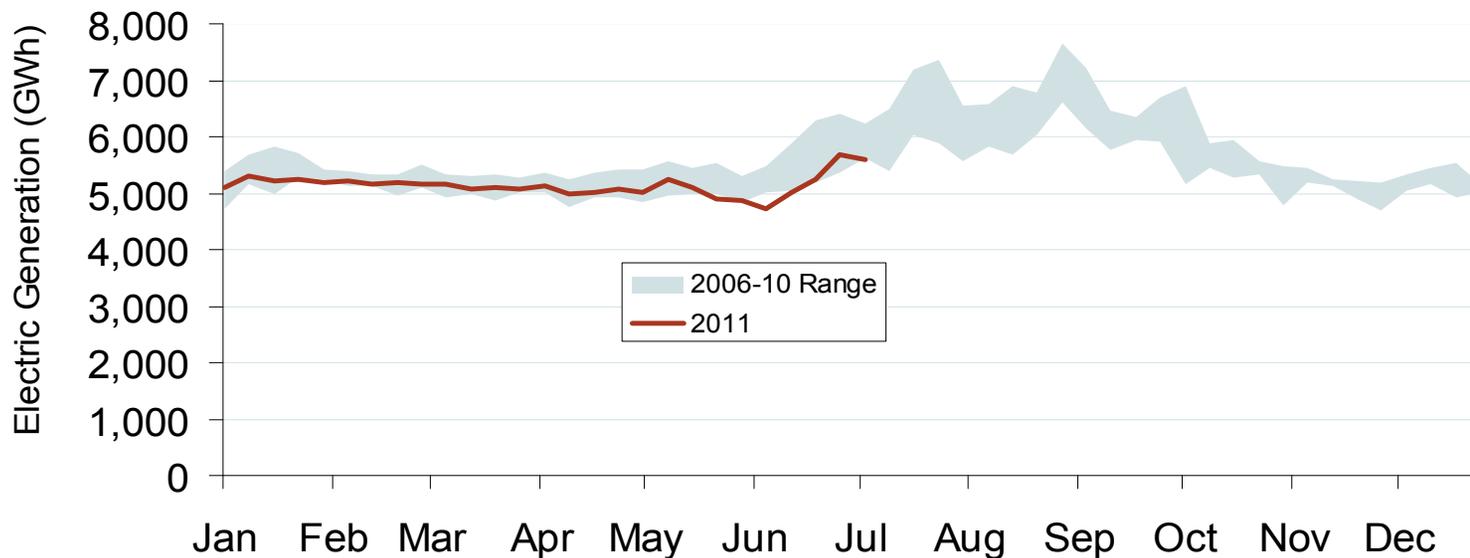
# Weekly Electric Generation Output and Temperatures Rocky Mountains Region



Source: Derived from *EEl* and *NOAA* data.

Updated: July 08, 2011

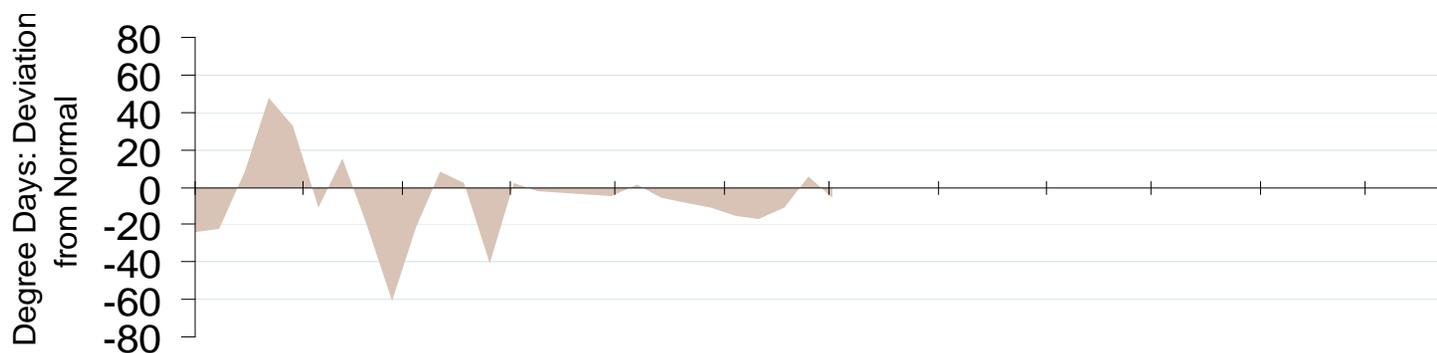
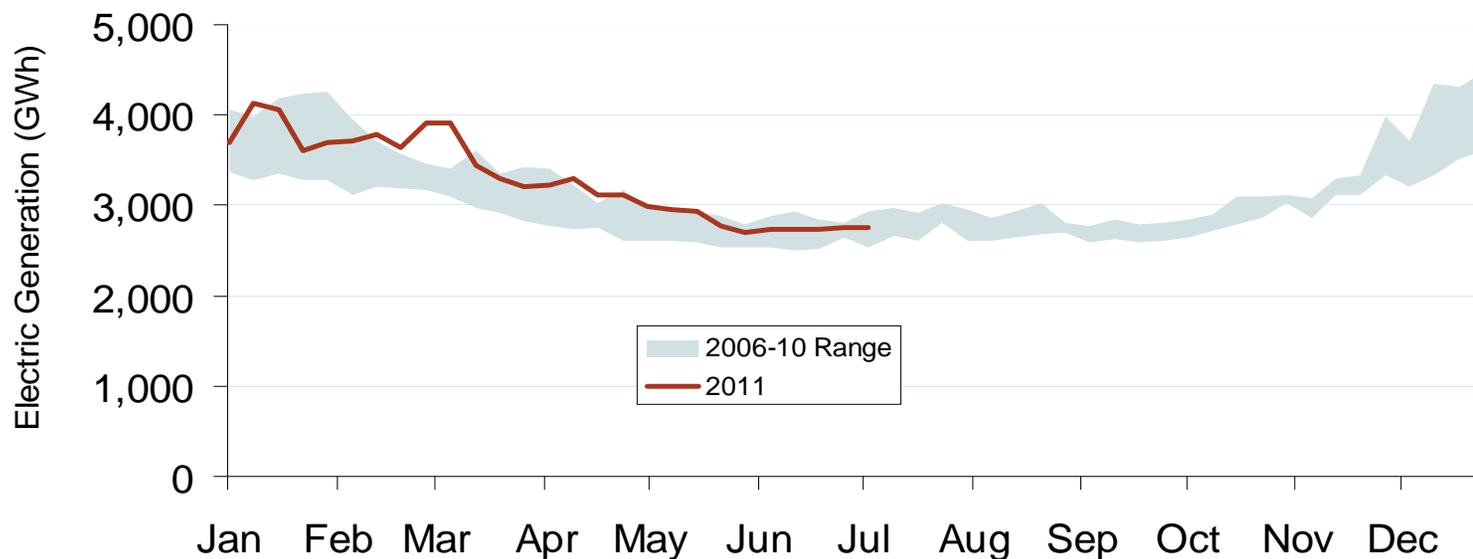
# Weekly Electric Generation Output and Temperatures California



Source: Derived from *EEl* and *NOAA* data.

Updated: July 08, 2011

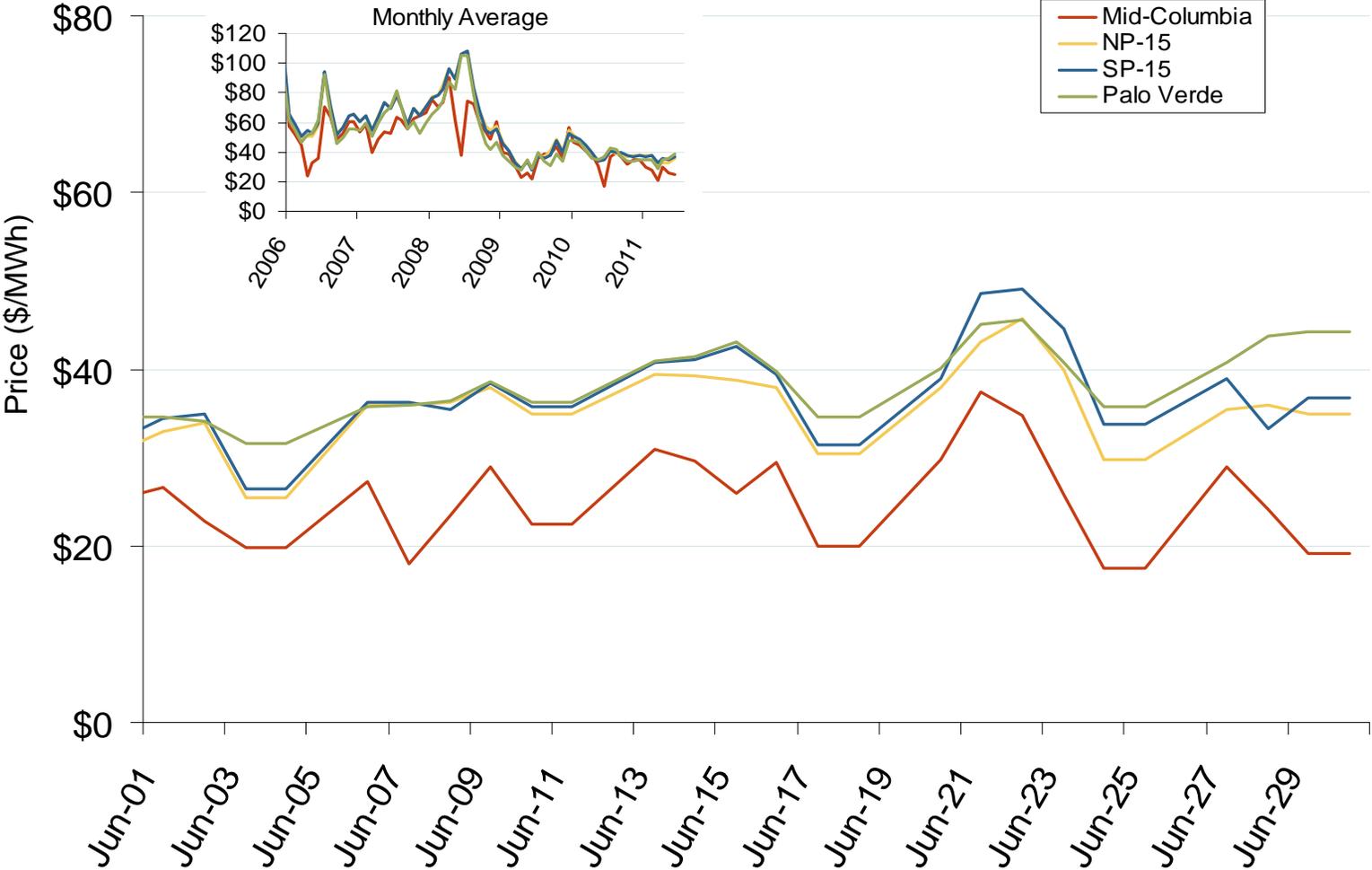
# Weekly Electric Generation Output and Temperatures Pacific Northwest Region



Source: Derived from *EI* and *NOAA* data.

Updated: July 08, 2011

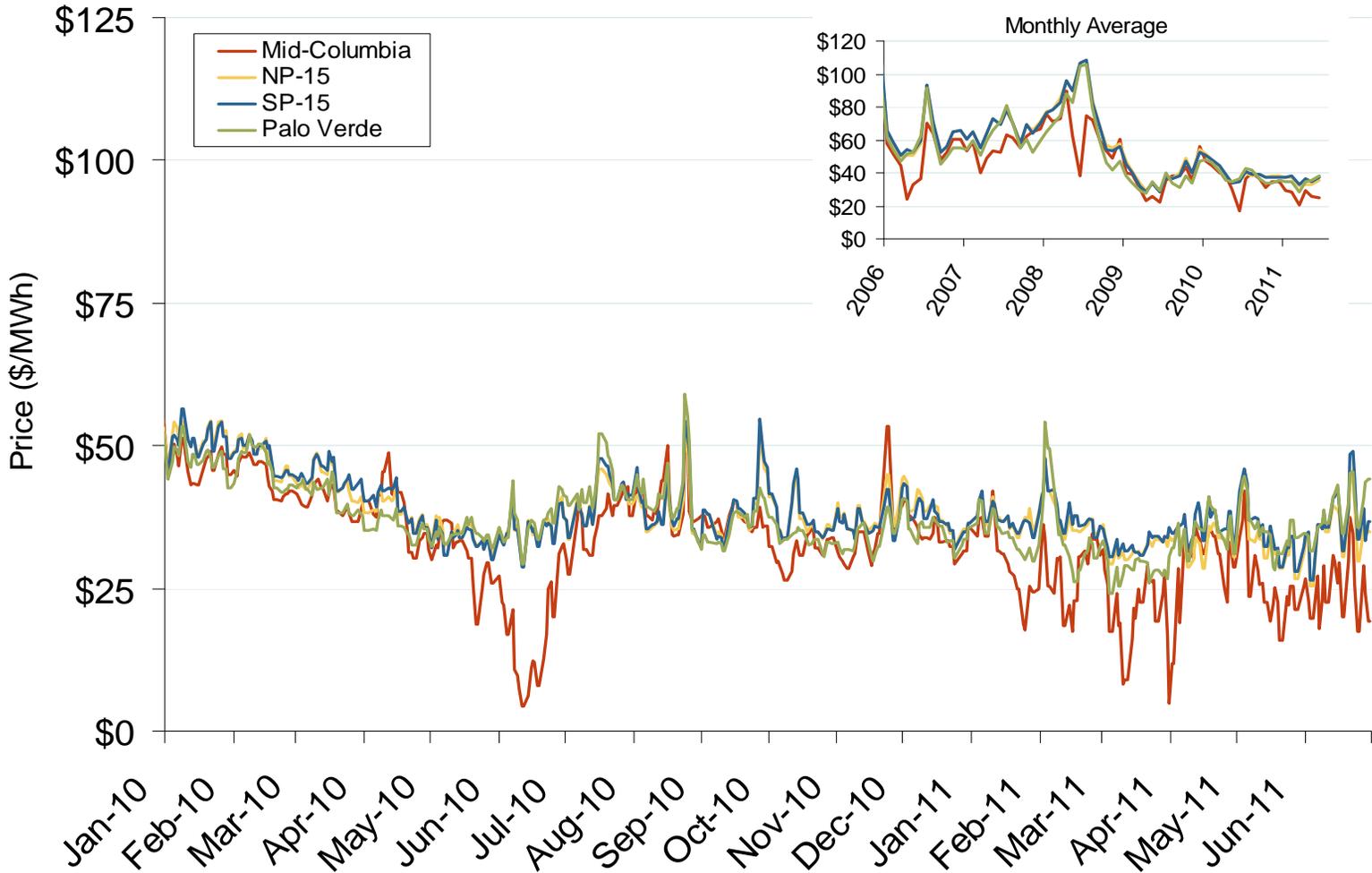
# Western Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data.

Updated: July 08, 2011

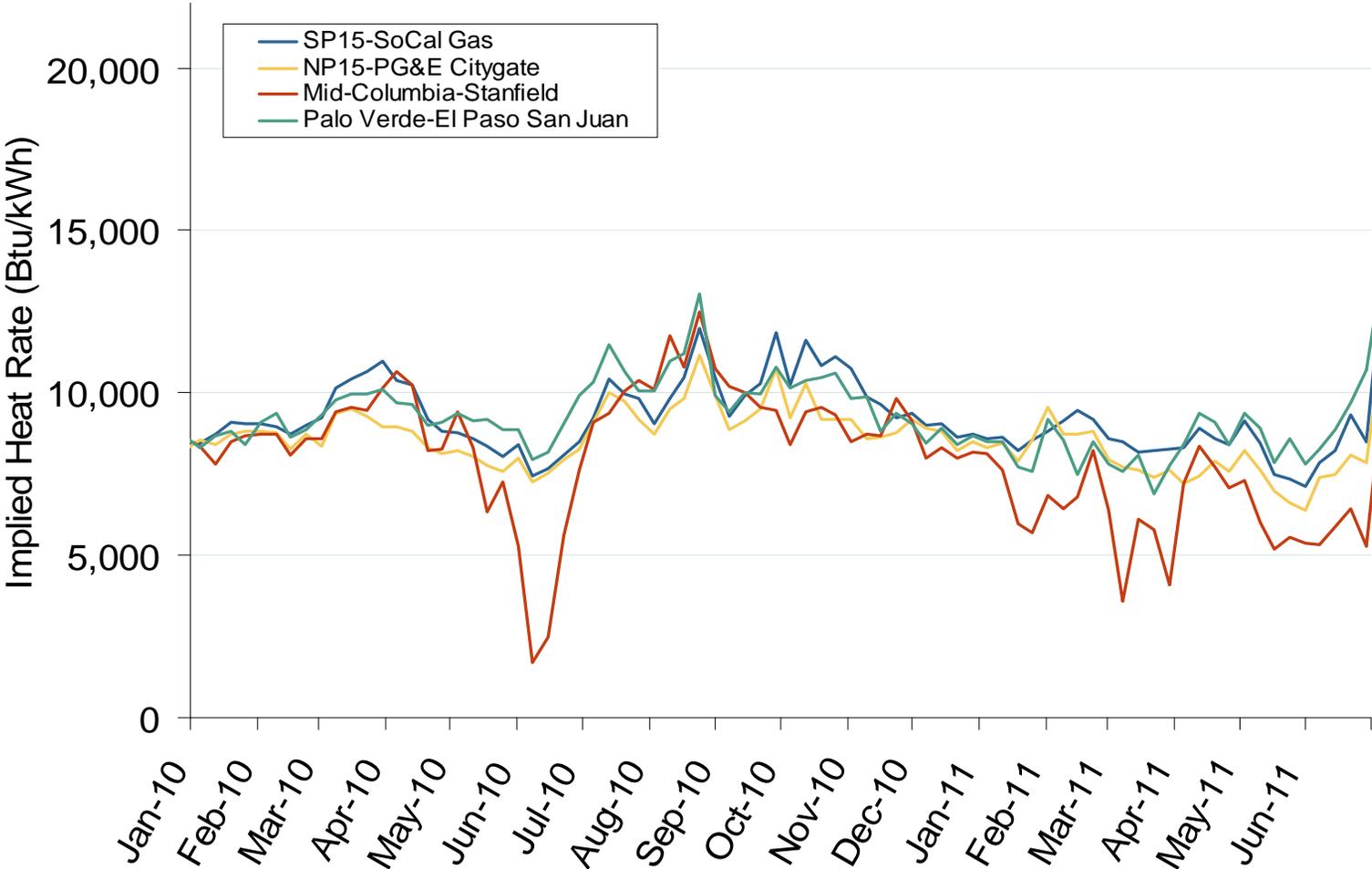
# Western Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from Platts data.

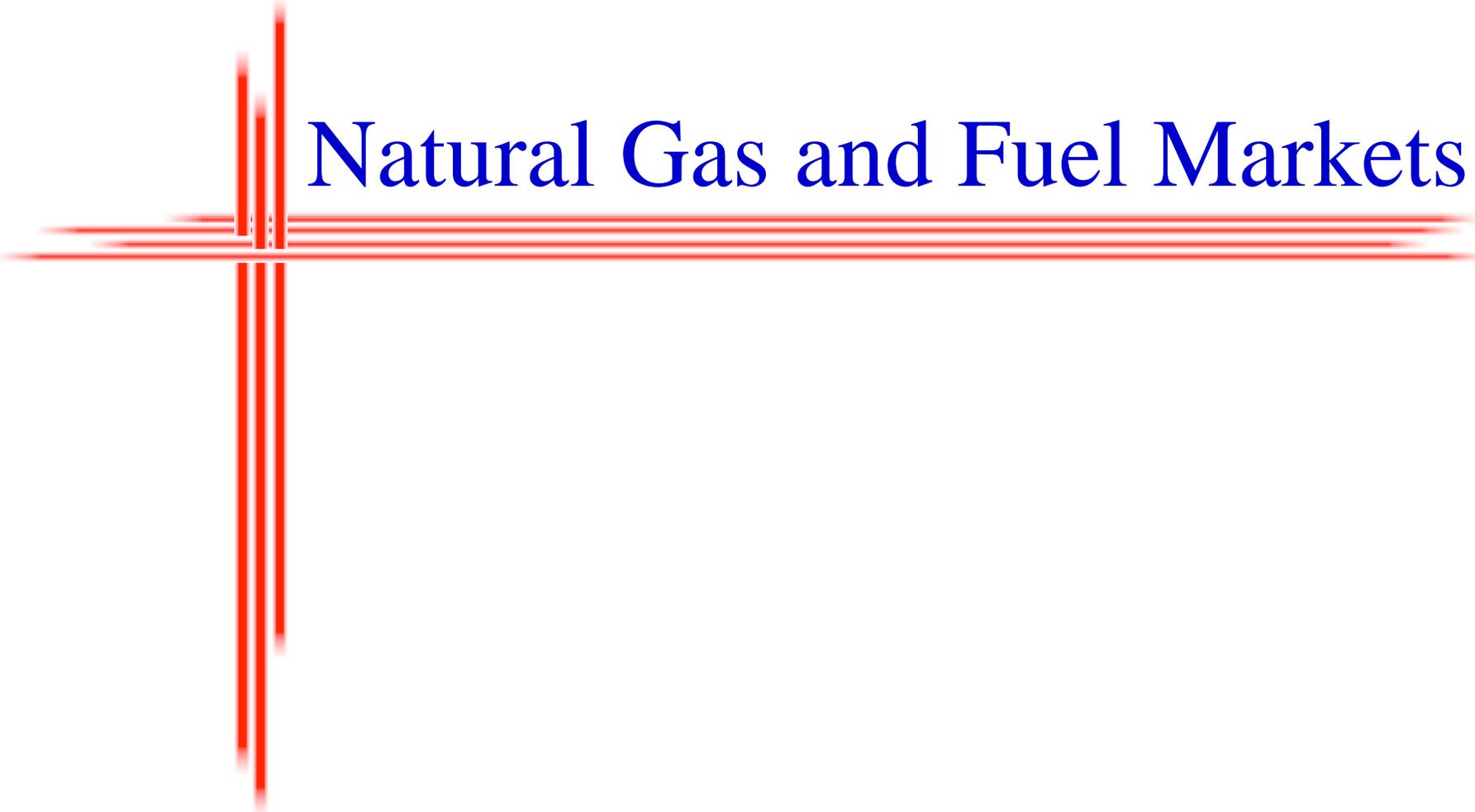
Updated: July 08, 2011

# Implied Heat Rates at Western Trading Points Weekly Averages



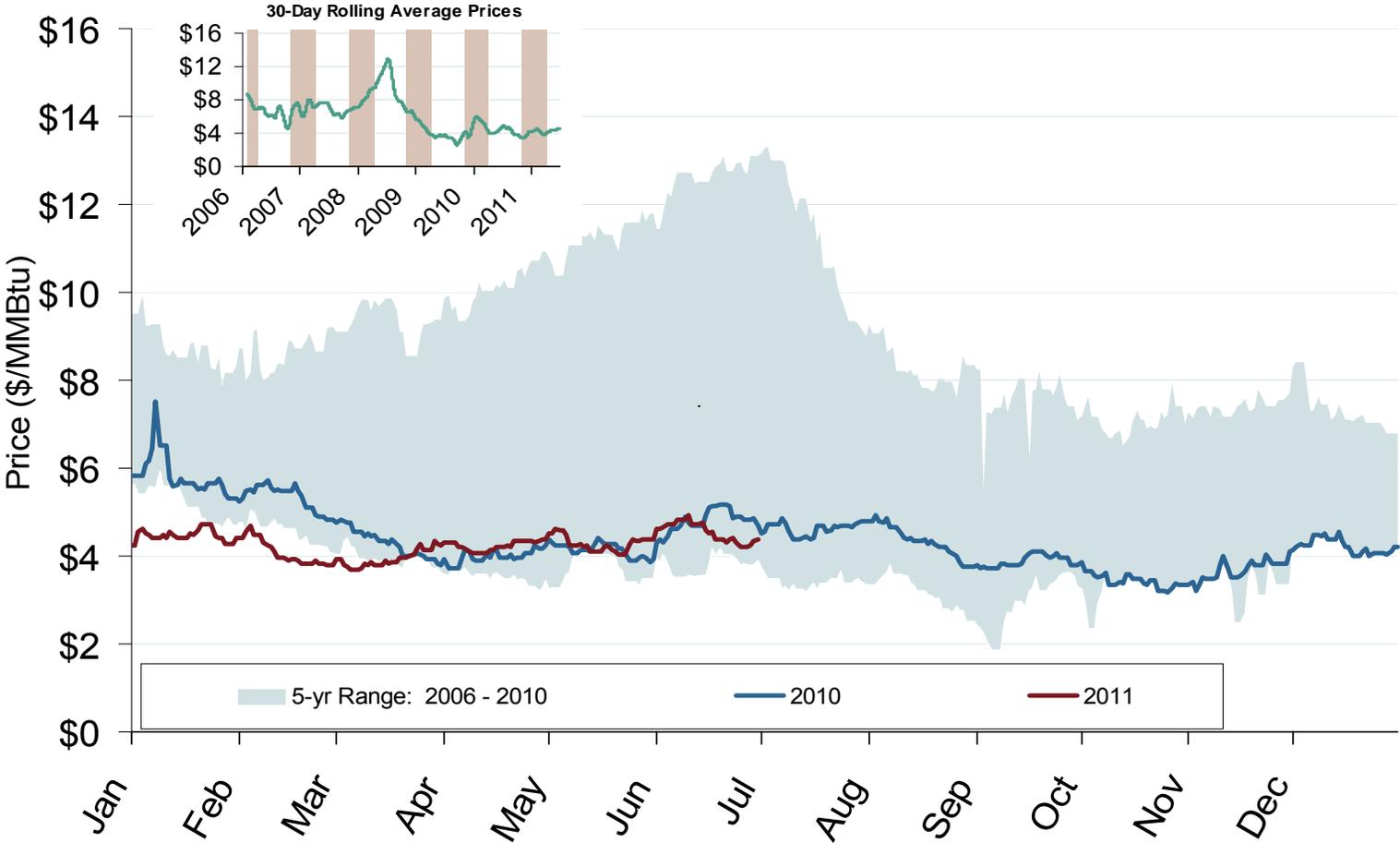
Source: Derived from *Platts* on-peak electric and natural gas price data.

Updated: July 08, 2011



# Natural Gas and Fuel Markets

# Henry Hub Natural Gas Daily Spot Prices



Source: Derived from *Platts* data.

Updated: July 08, 2011

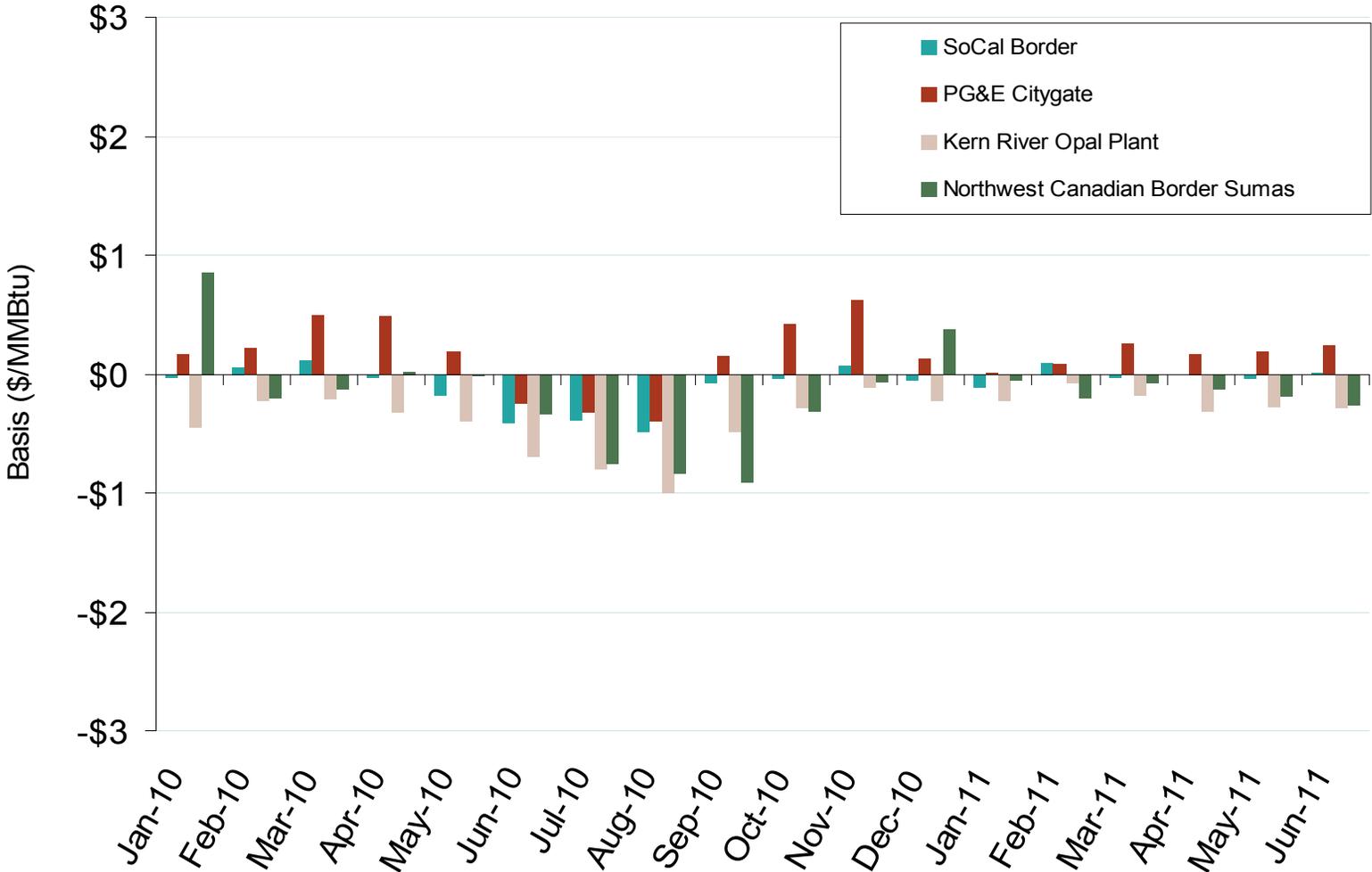
# Western Day-Ahead Hub Spot Prices and Basis



Source: Derived from *Platts* data.

Updated: July 08, 2011

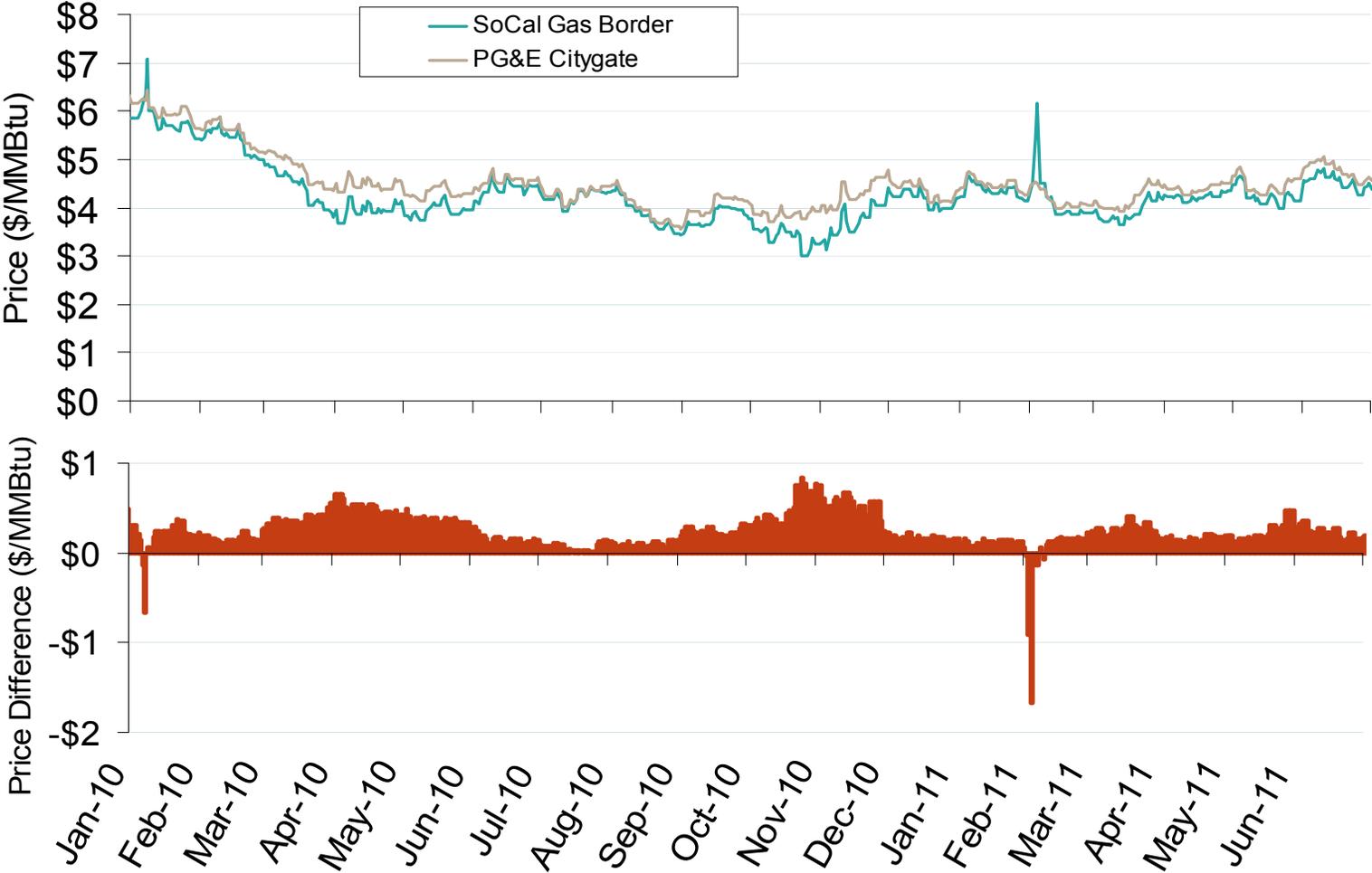
# Western Monthly Average Basis Value to Henry Hub



Source: Derived from Platts data.

Updated: July 08, 2011

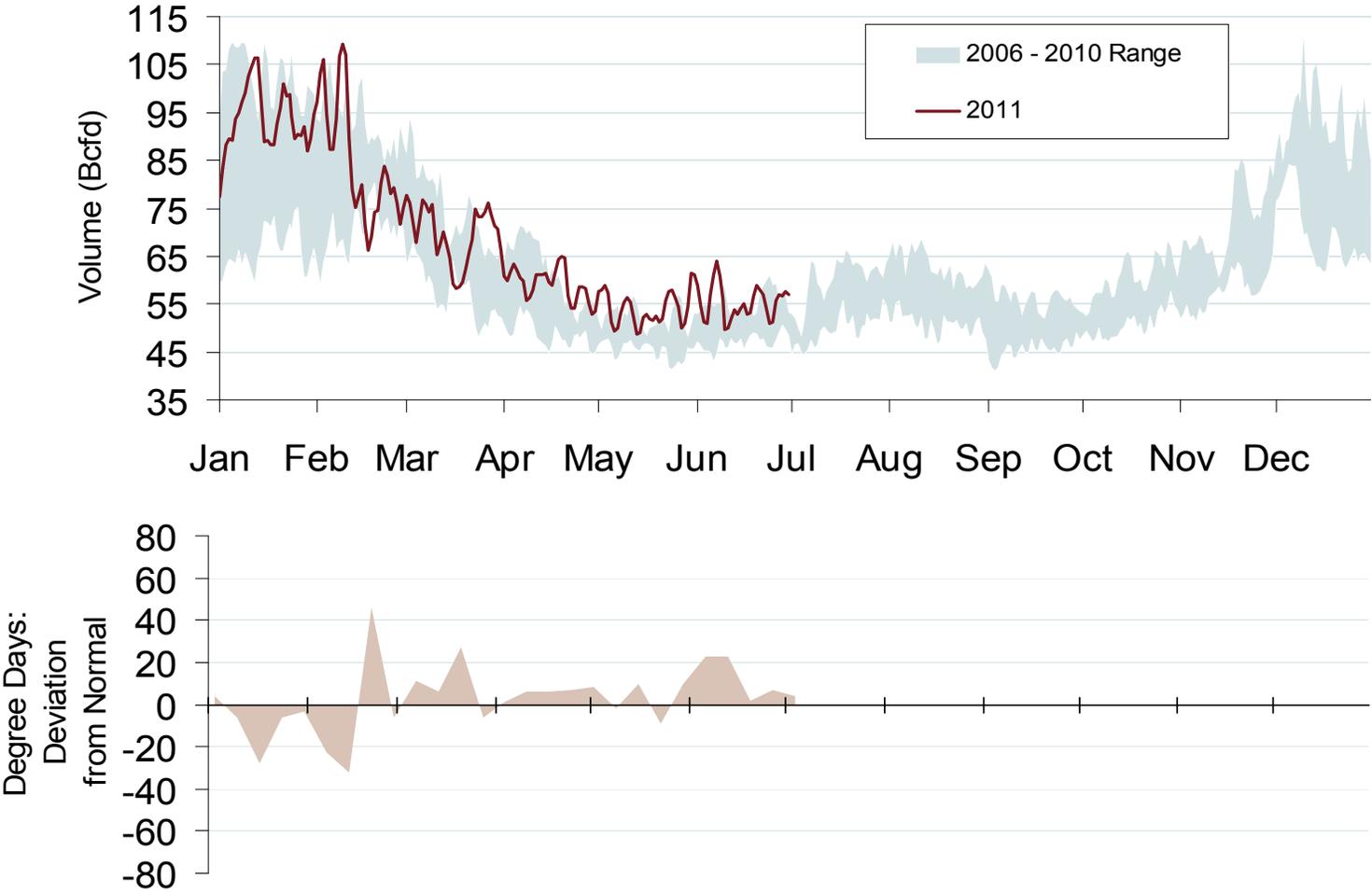
# Difference in Northern and Southern California Daily Spot Prices



Source: Derived from *Platts* data.

Updated: July 08, 2011

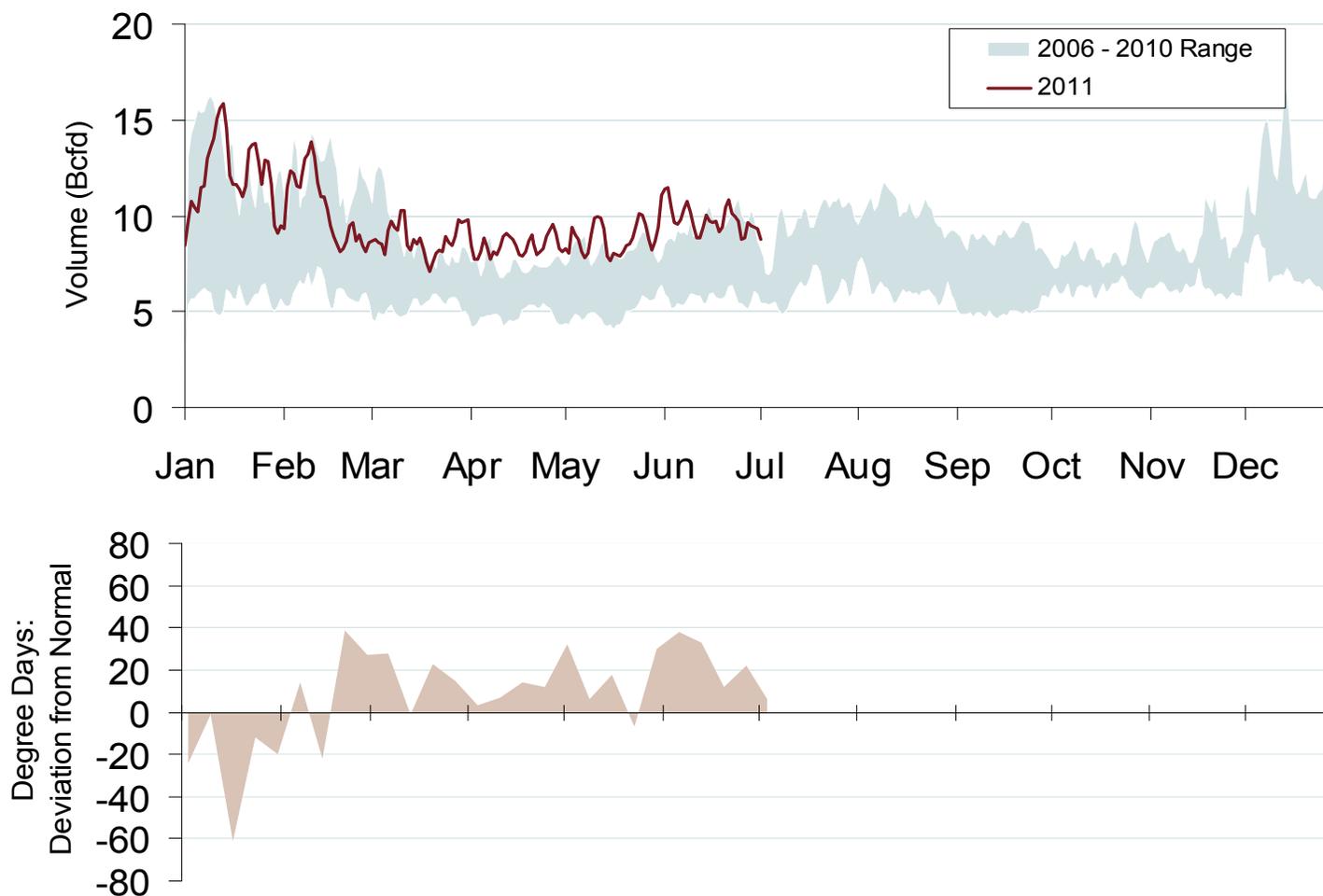
# Total U.S. Natural Gas Demand (All Sectors) and Temperatures



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

Updated: July 08, 2011

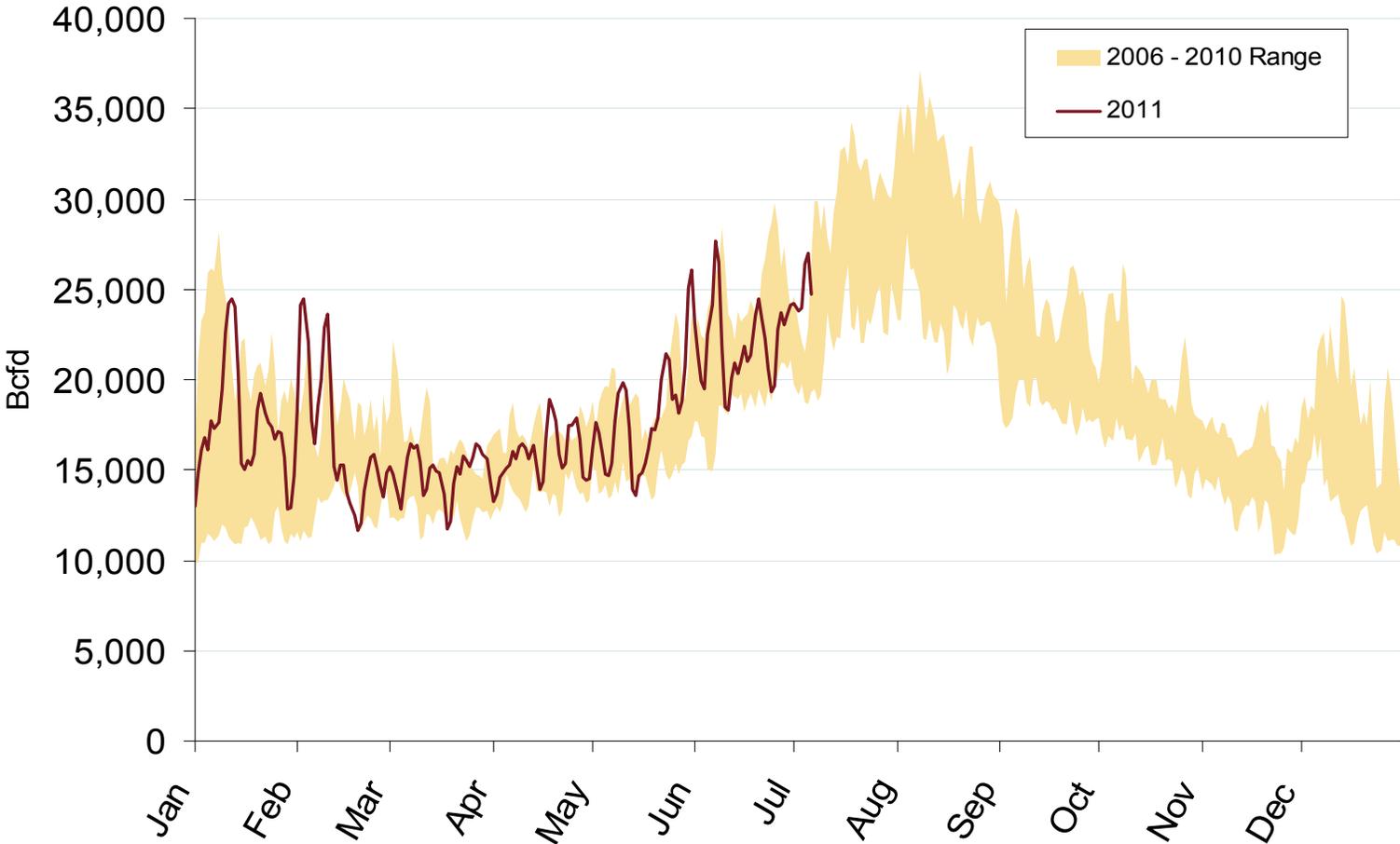
## Daily Southeast Natural Gas Demand - All Sectors



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

Updated: July 08, 2011

# U.S. Natural Gas Consumption for Power Generation

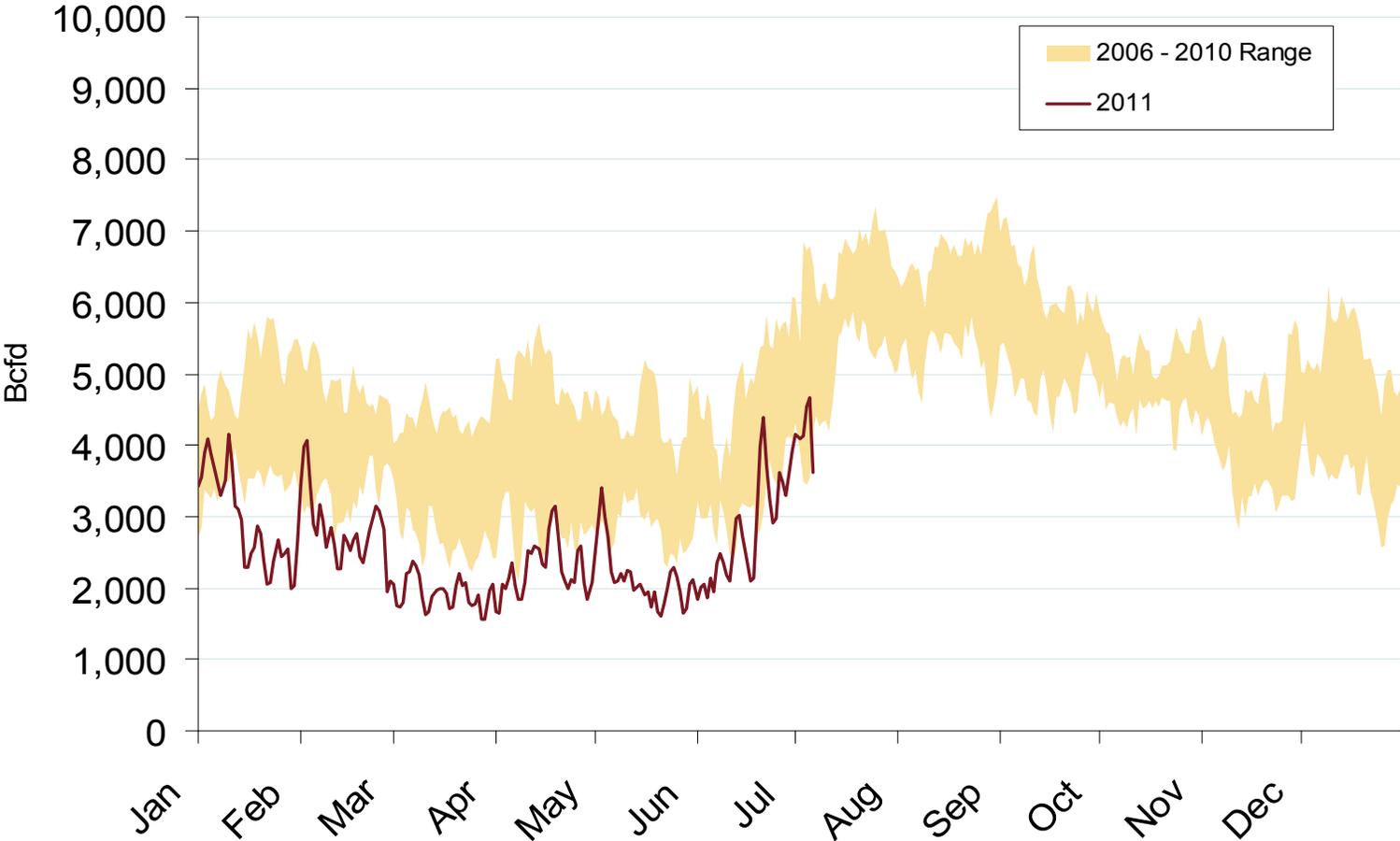


Source: Derived from *Bentek Energy* data.

Updated: July 08, 2011

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

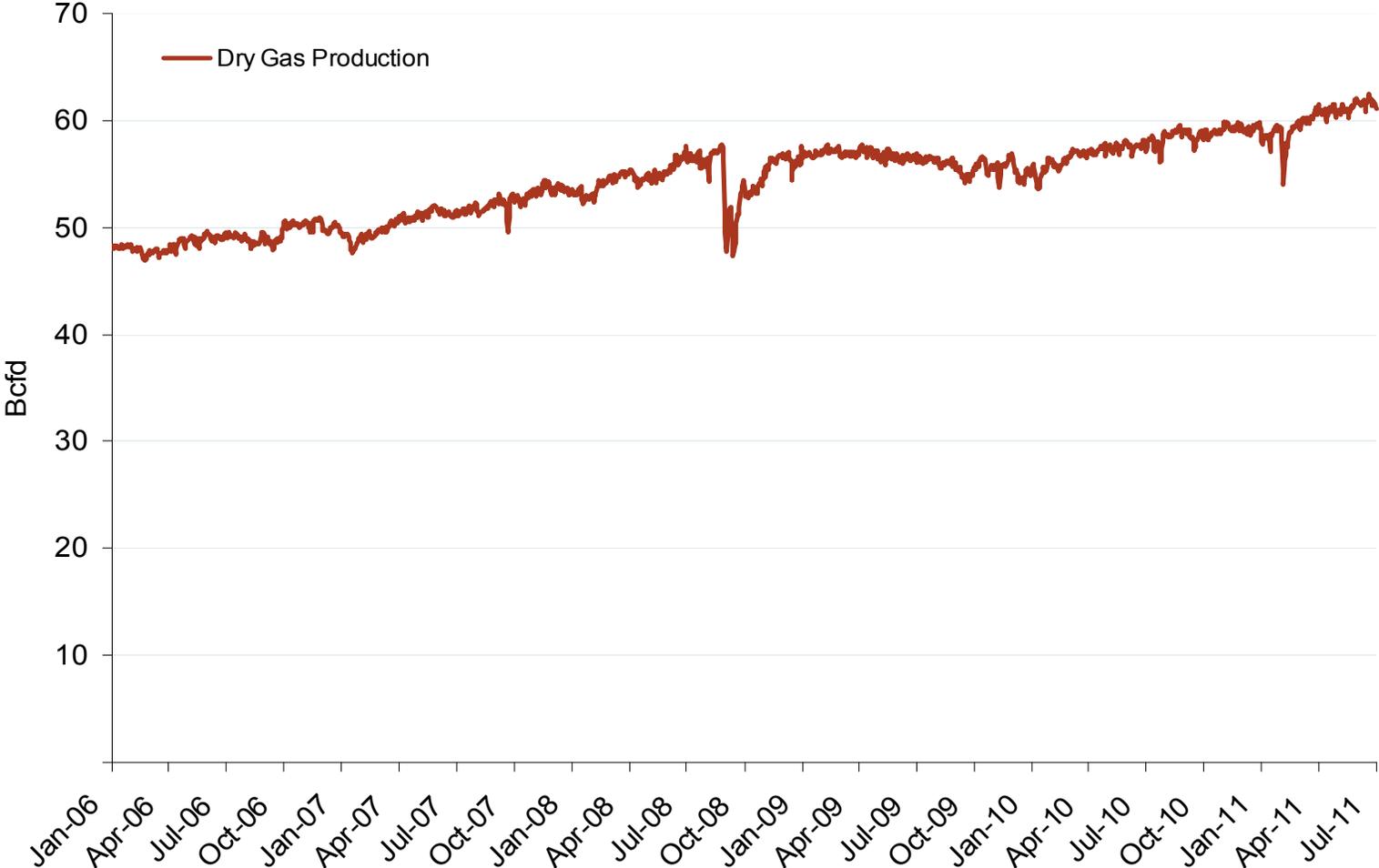
# Western Natural Gas Consumption for Power Generation



Source: Derived from *Bentek Energy* data.

Updated: July 08, 2011

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

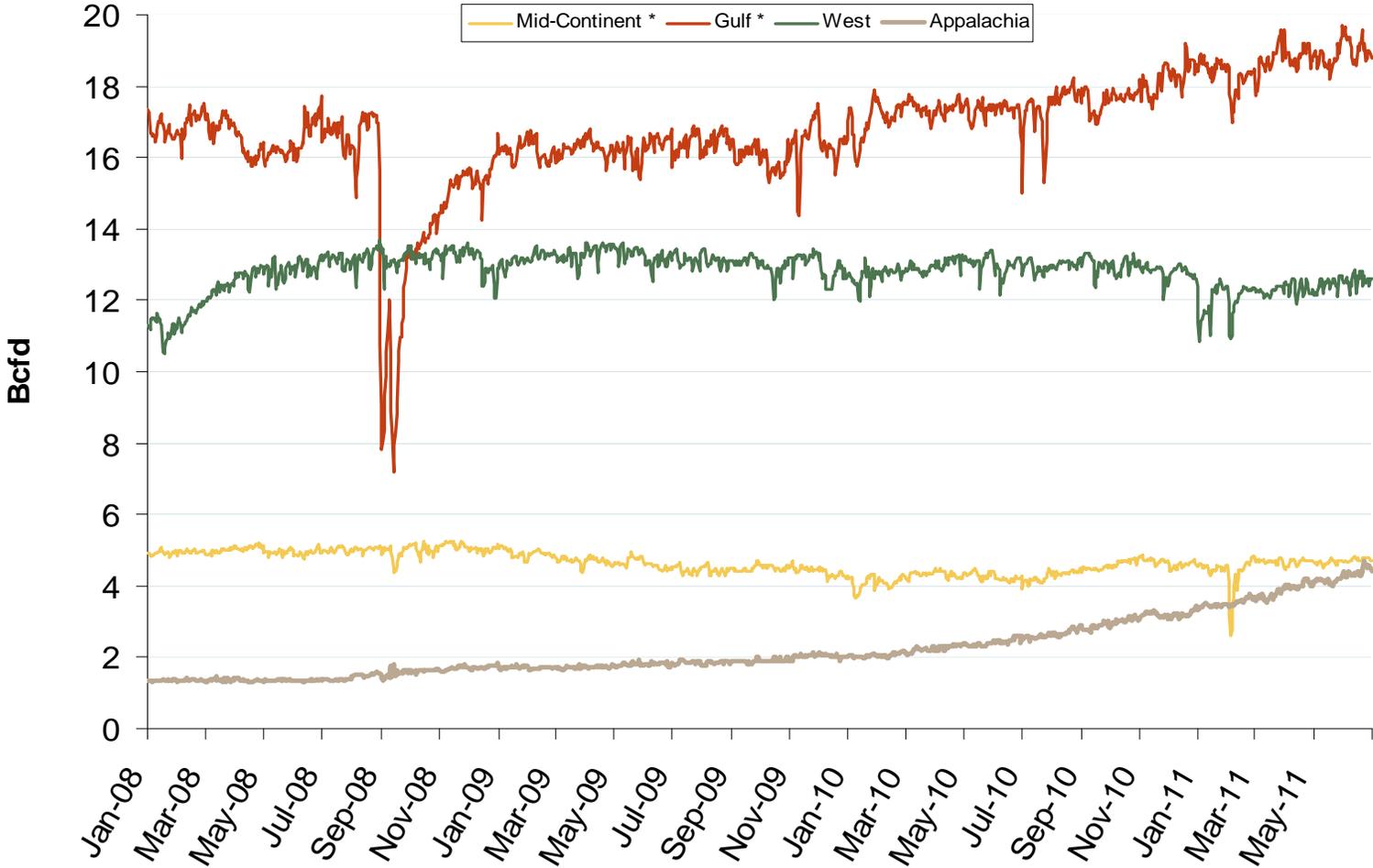


Source: Derived from *Bentek Energy* data.

Note: Prior to July 2010, chart was derived from a combination of *EIA* and *Bentek Energy* data

Updated: July 08, 2011

# Regional Natural Gas Production



Source: Derived from *Bentek Energy* data.

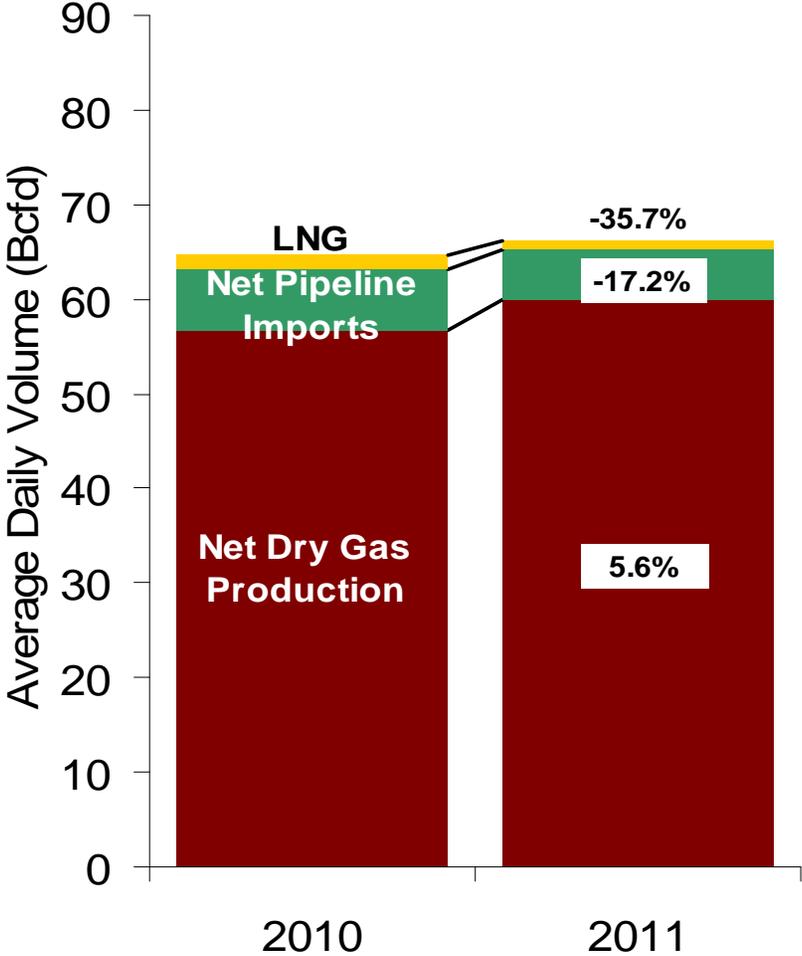
\* On July 1, 2009 *Bentek Energy* redefined its regions, moving some of the southern Midcontinent production to the Southeast, which is included in Gulf series.

Updated: July 08, 2011

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

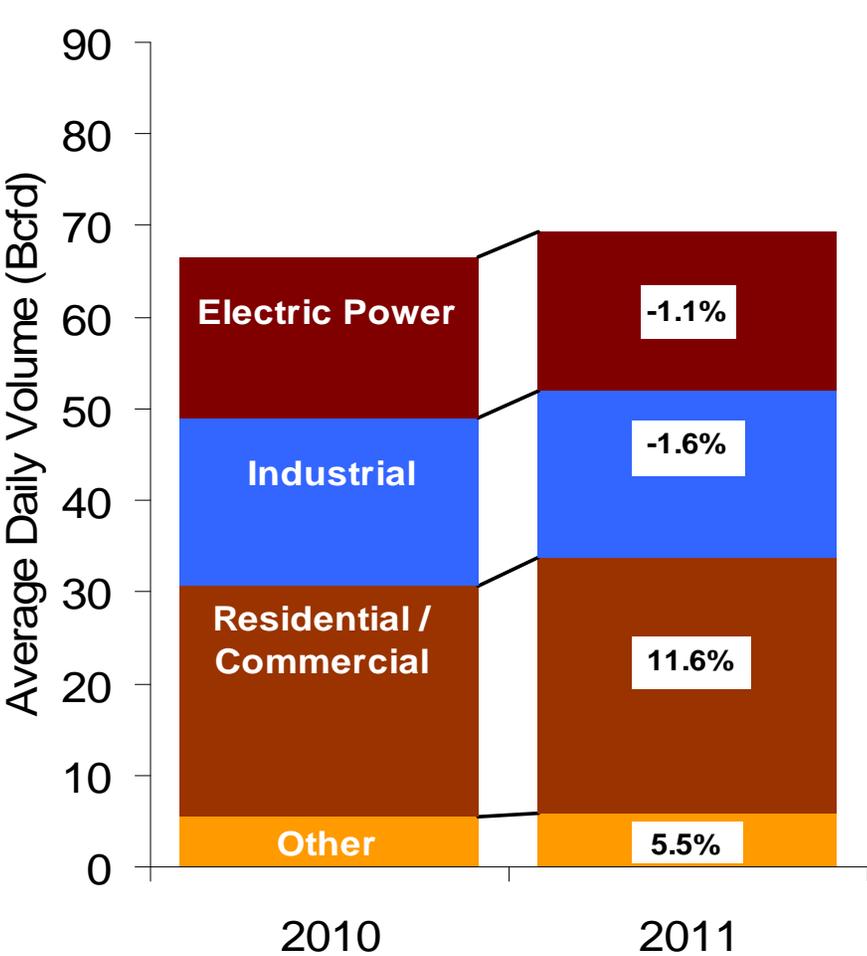
## US Natural Gas Supply

Total Change in Supply 3.4%



## US Natural Gas Demand

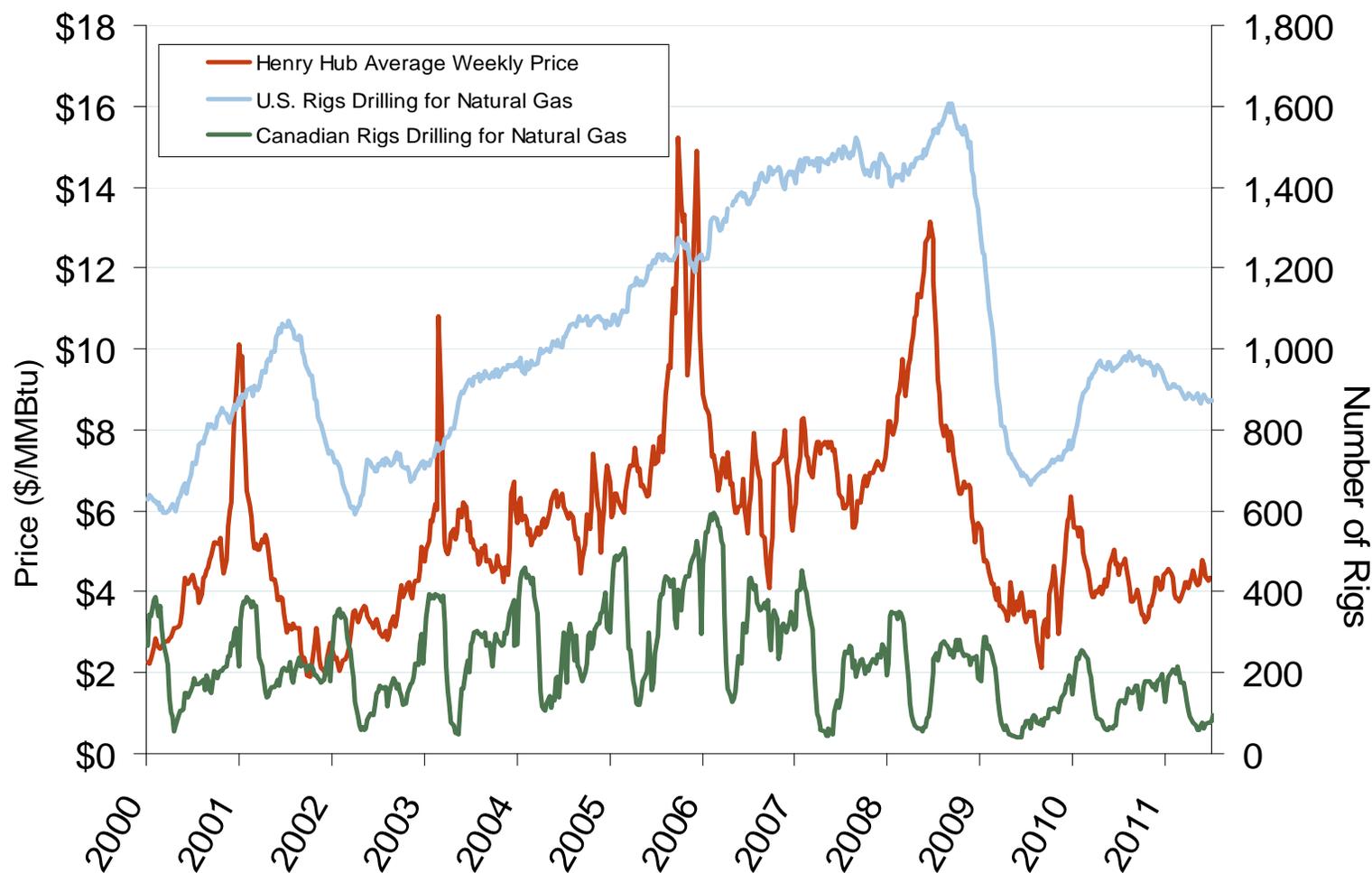
Total Change in Demand -4.0%



Source: Derived from Bentek data.  
July 2011 Western Snapshot Report

Updated July 7, 2011

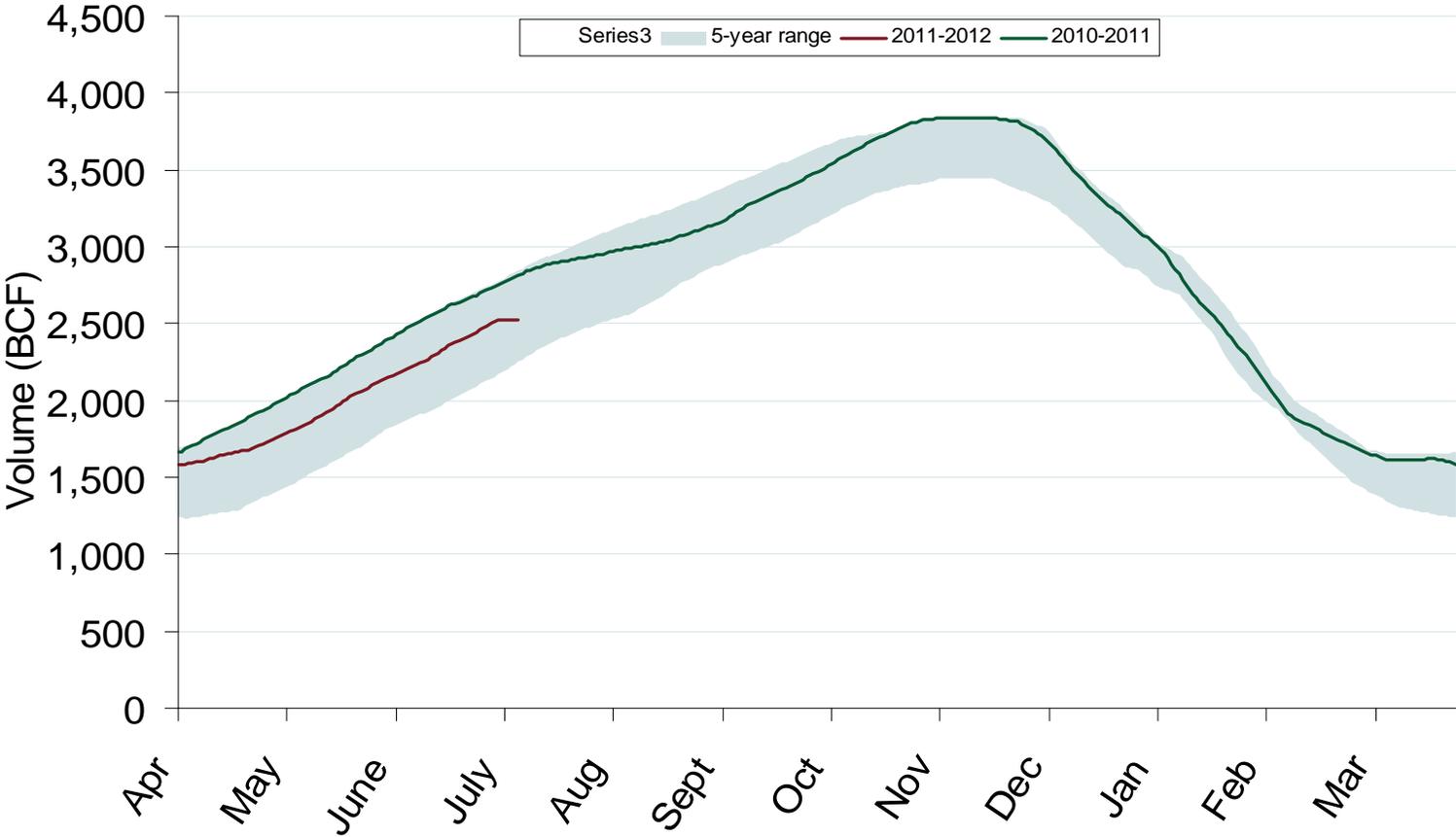
## U.S. and Canadian Natural Gas Drilling Rig Count and Daily Spot Prices



Source: Derived from Platts and Baker Hughes data.

Updated: July 08, 2011

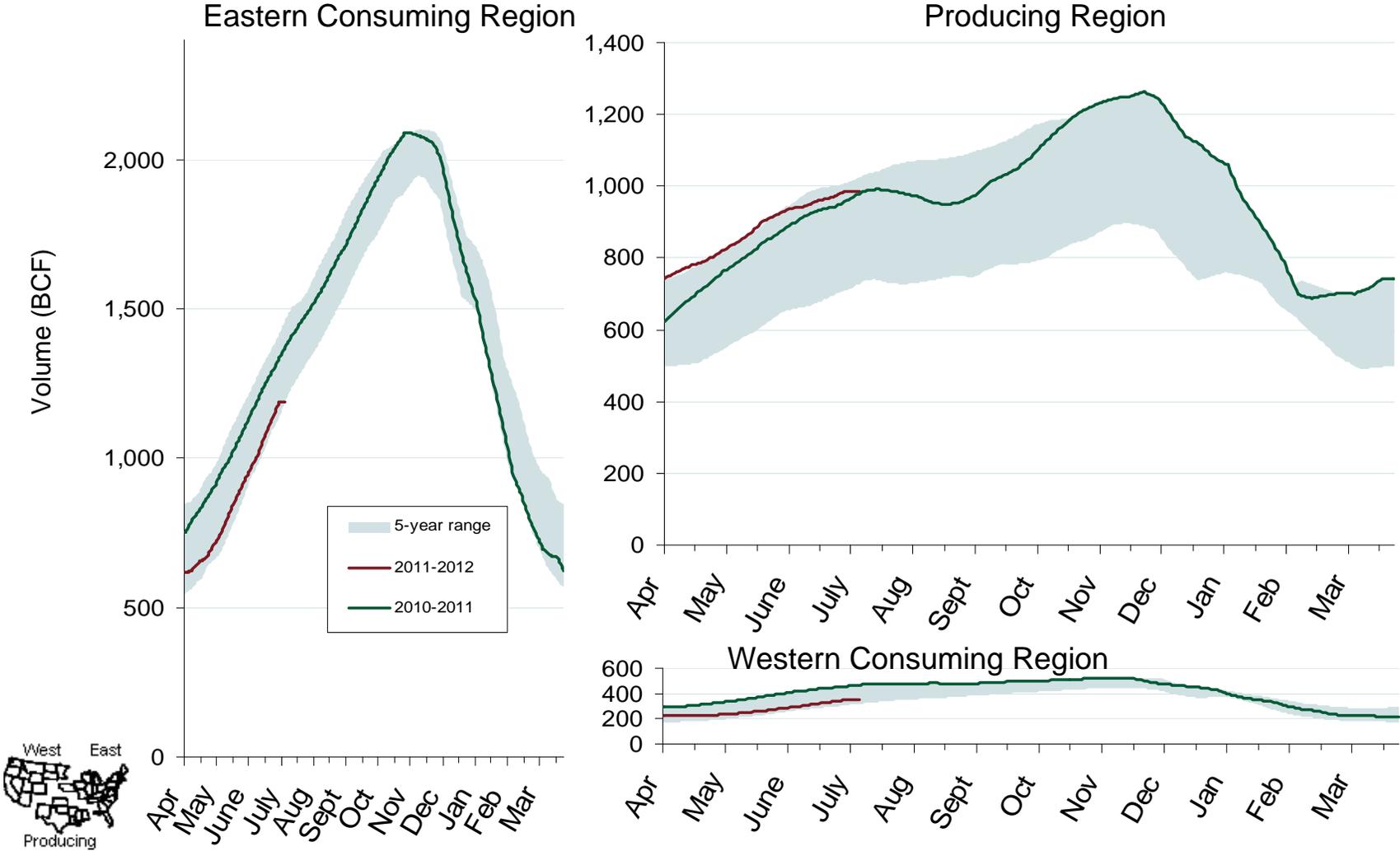
# Total U.S. Working Gas in Storage



Source: Derived from EIA data.

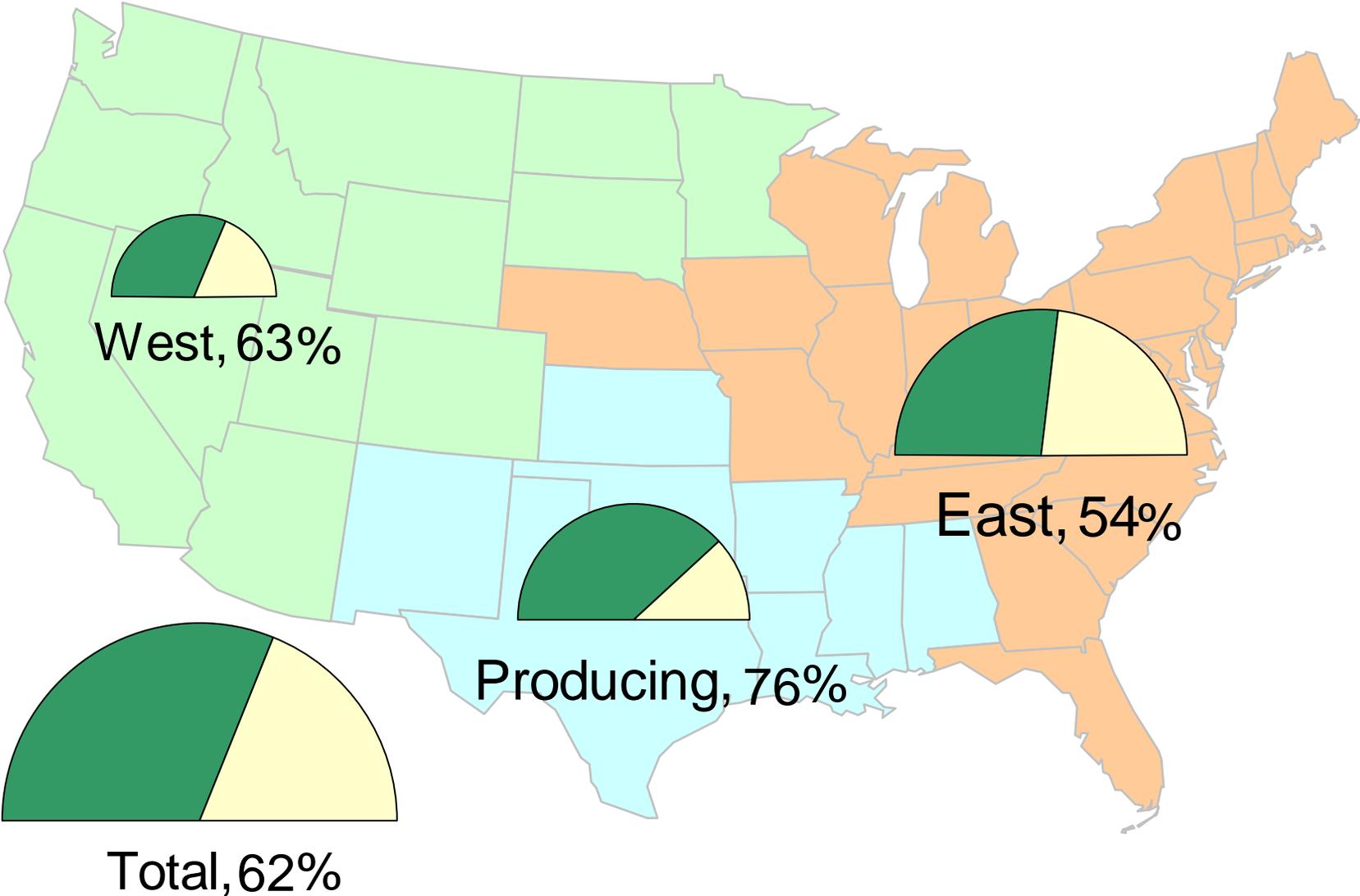
Updated: July 08, 2011

# Regional Totals of Working Gas in Storage



Source: Derived from EIA data.

# Natural Gas Storage Inventories – July 1, 2011

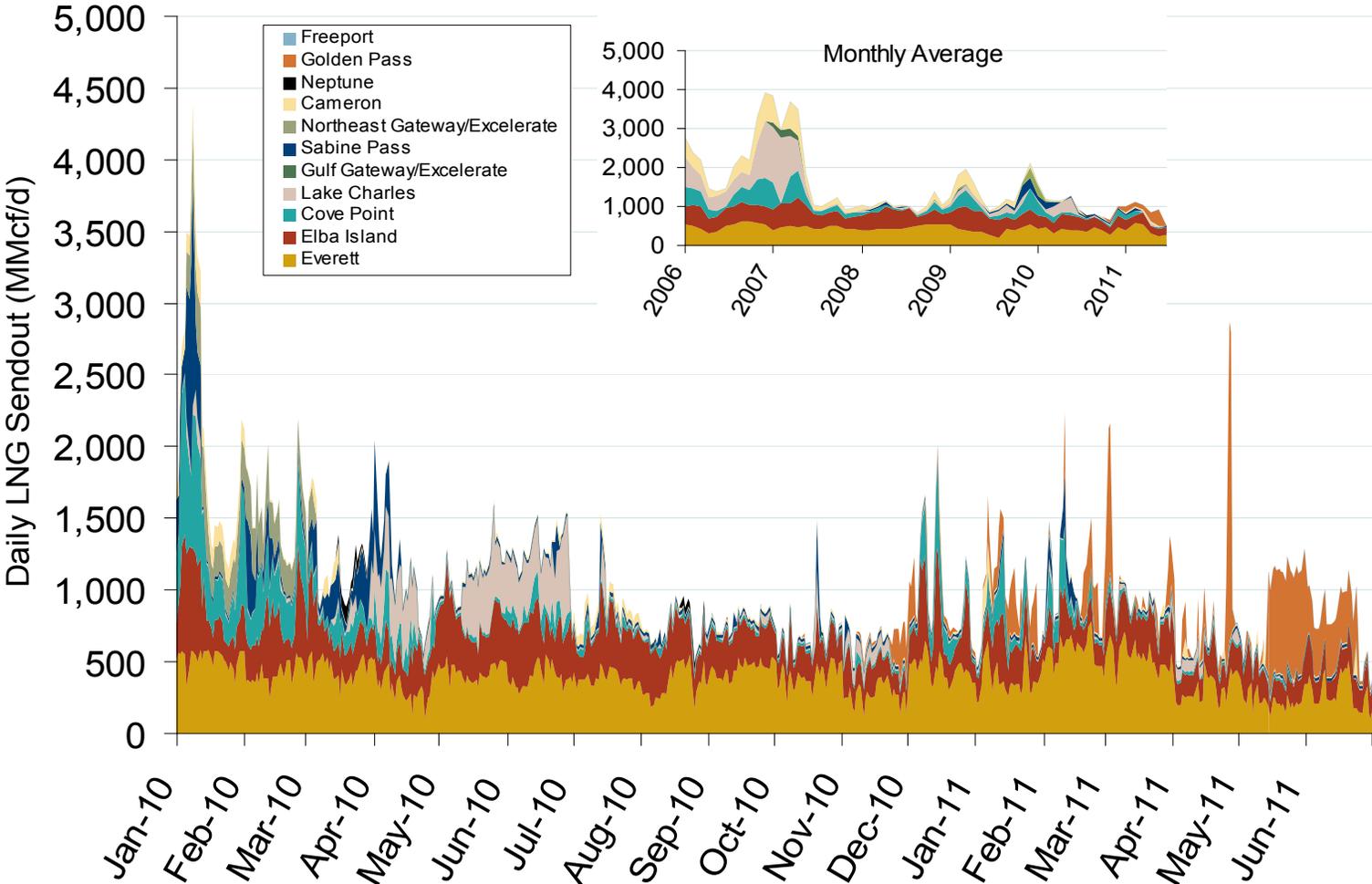


Source: Derived from *EIA Storage and Estimated Working Gas Capacity* data.  
July 2011 Western Snapshot Report

## World LNG Estimated August 2011 Landed Prices



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

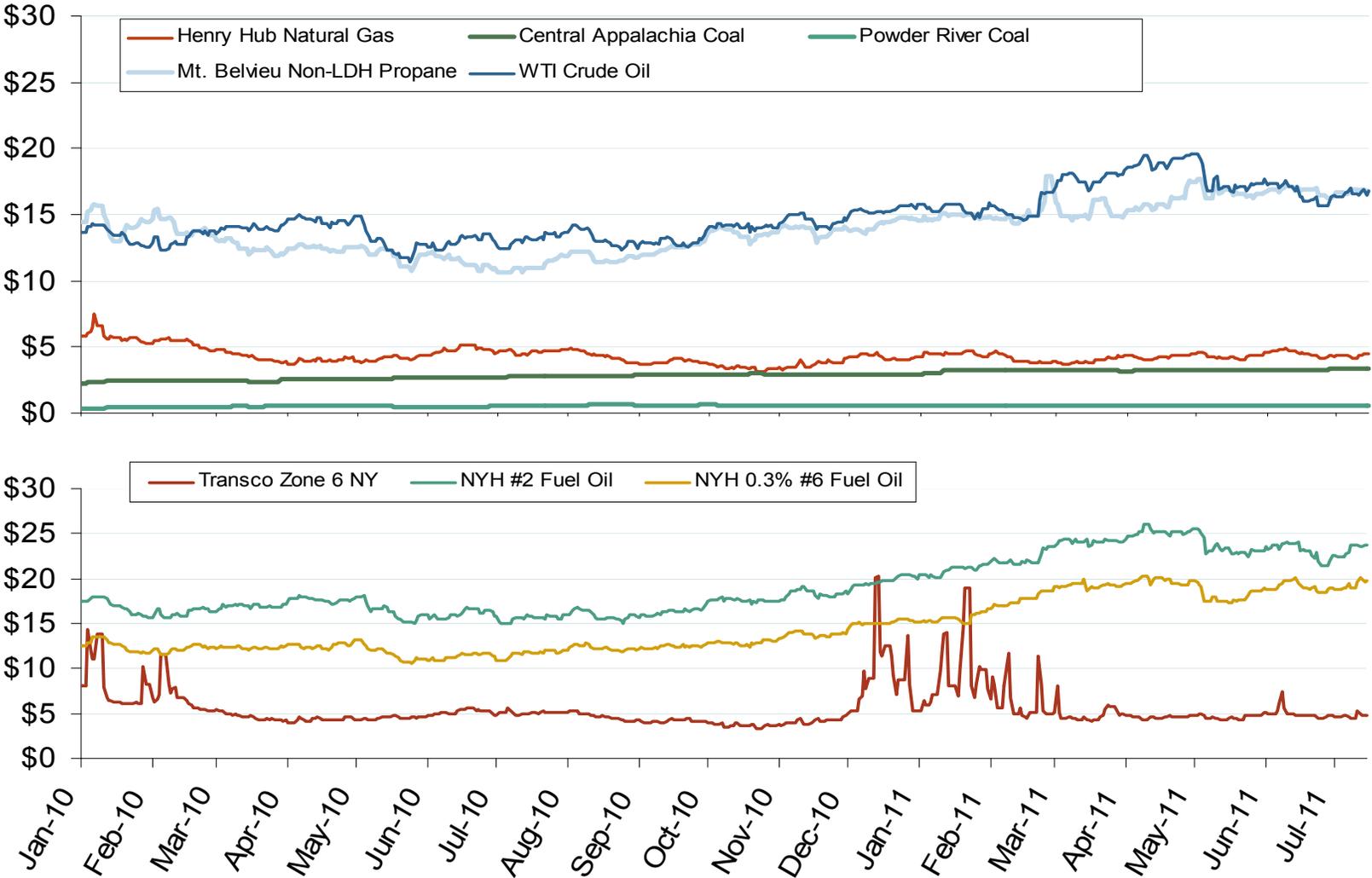


Source: Derived from *Bentek Energy* data.

\* 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 08, 2011

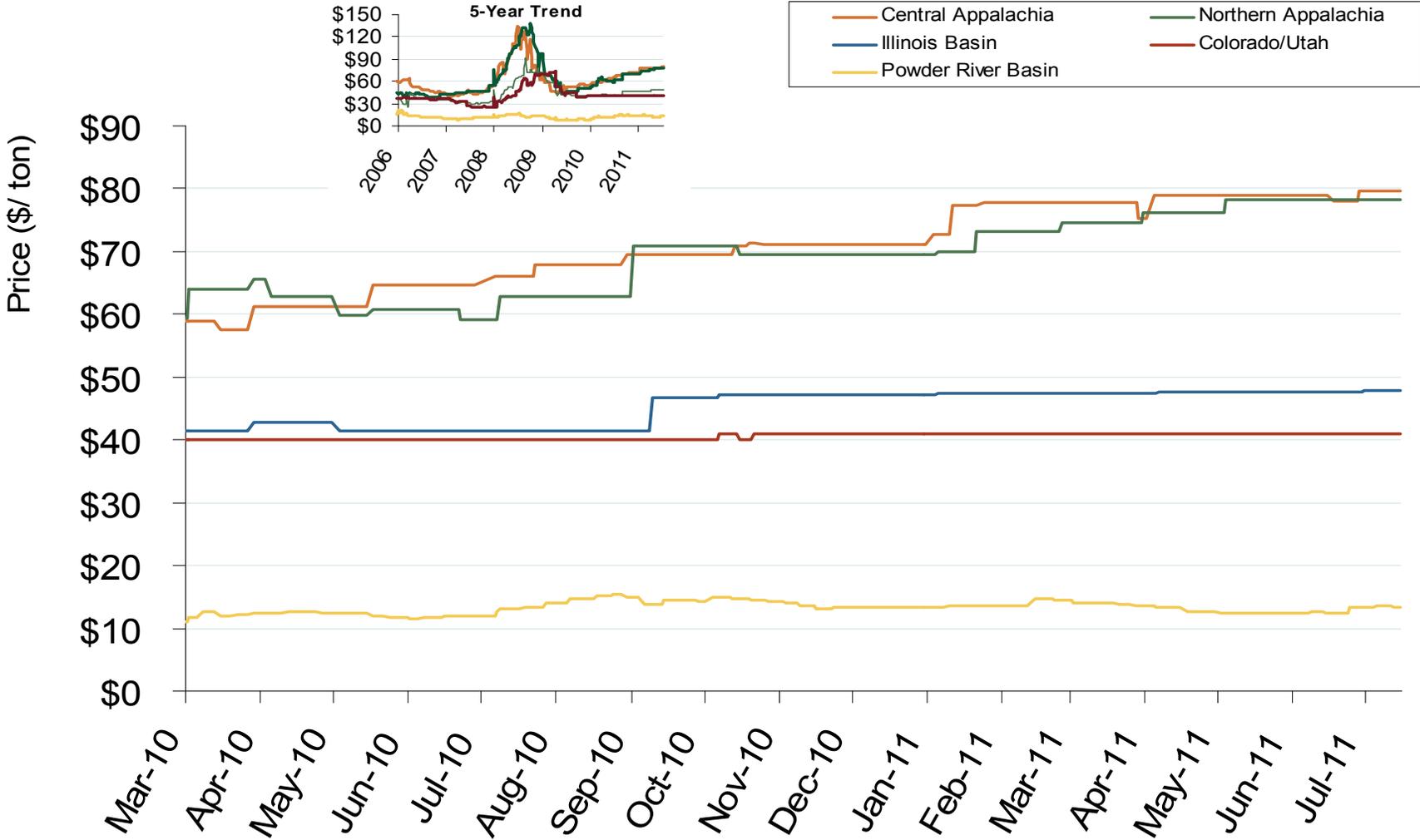
# Oil, Coal, Natural Gas and Propane Daily Spot Prices



Source: Derived from ICE and Bloomberg data.

Updated: July 15, 2011

# Regional Coal Spot Prices



Source: Derived from Bloomberg data.

Updated: July 15, 2011