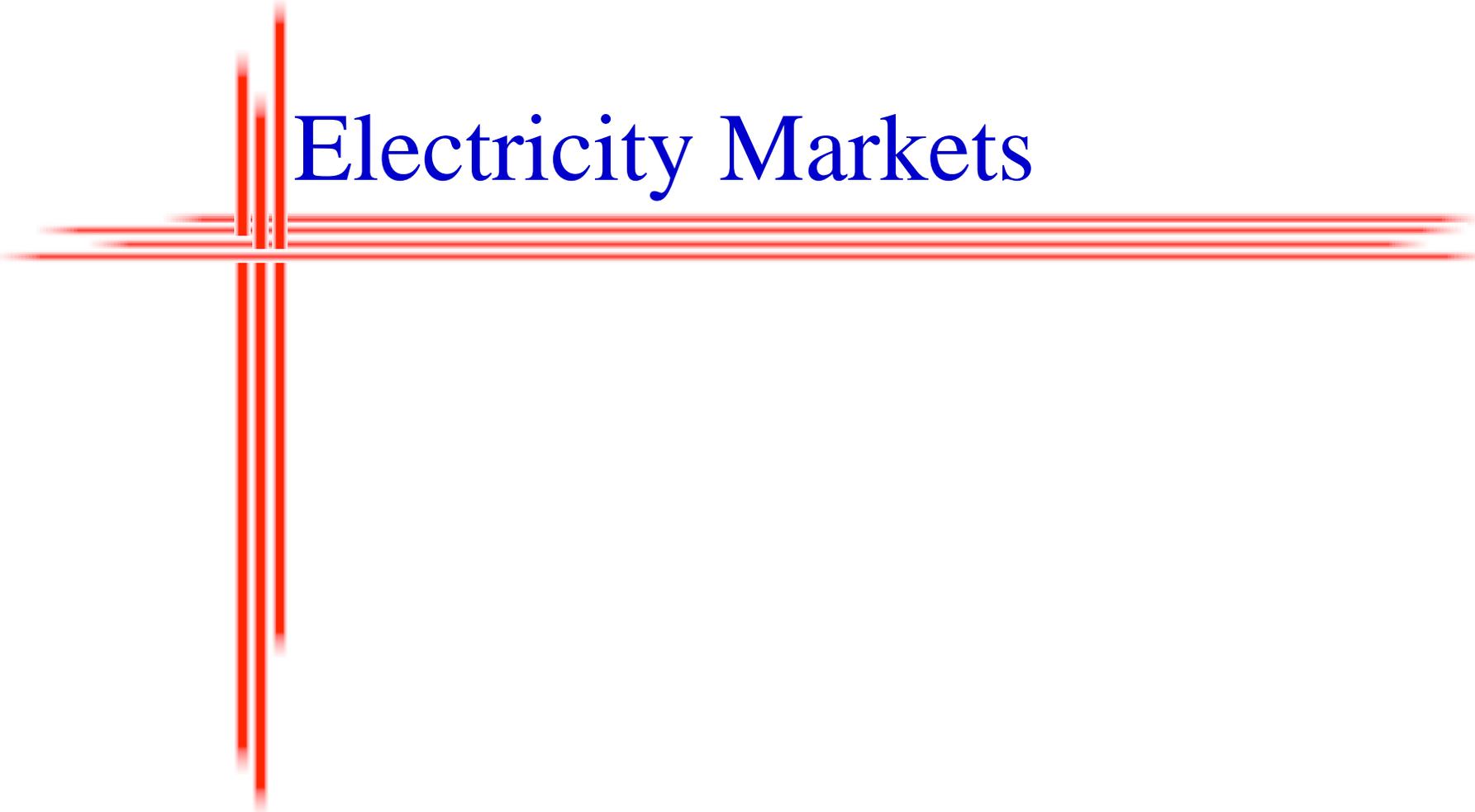


OE ENERGY MARKET SNAPSHOT

Southeast States Version – June 2010 Data

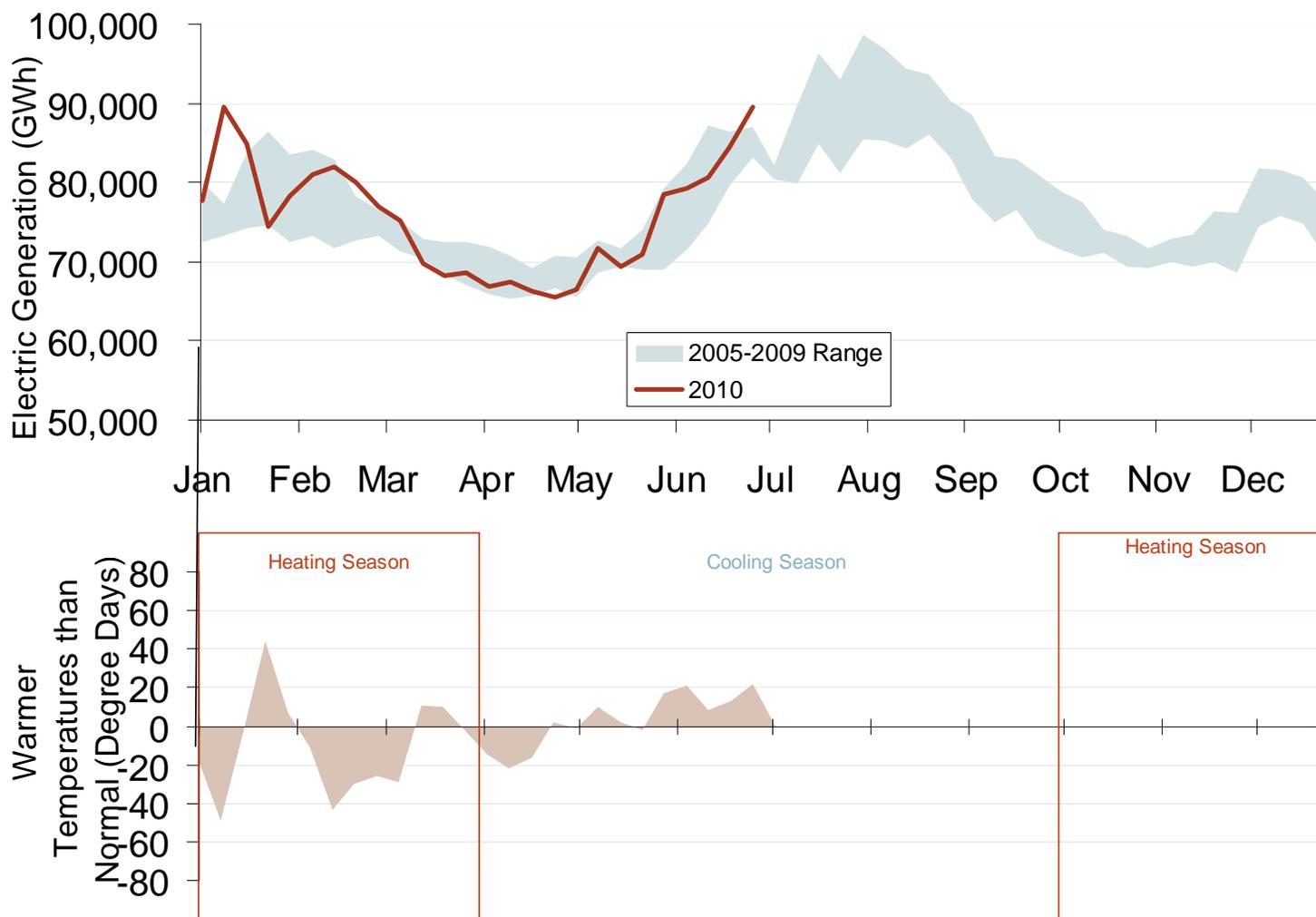
- **Electricity Markets**
- **Natural Gas and Fuel Markets**

Office of Enforcement
Federal Energy Regulatory Commission
July 2010

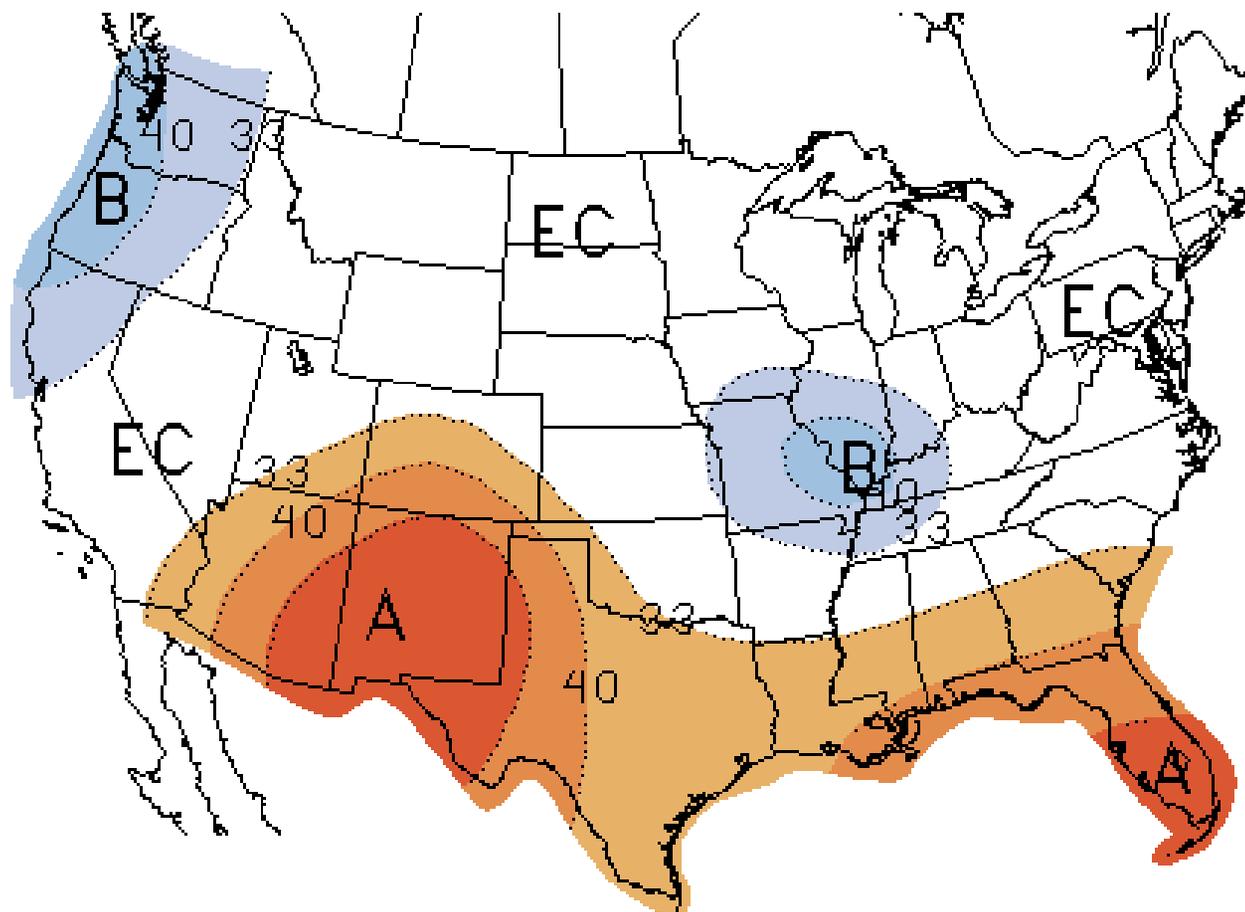


Electricity Markets

Weekly U.S. Electric Generation Output and Temperatures

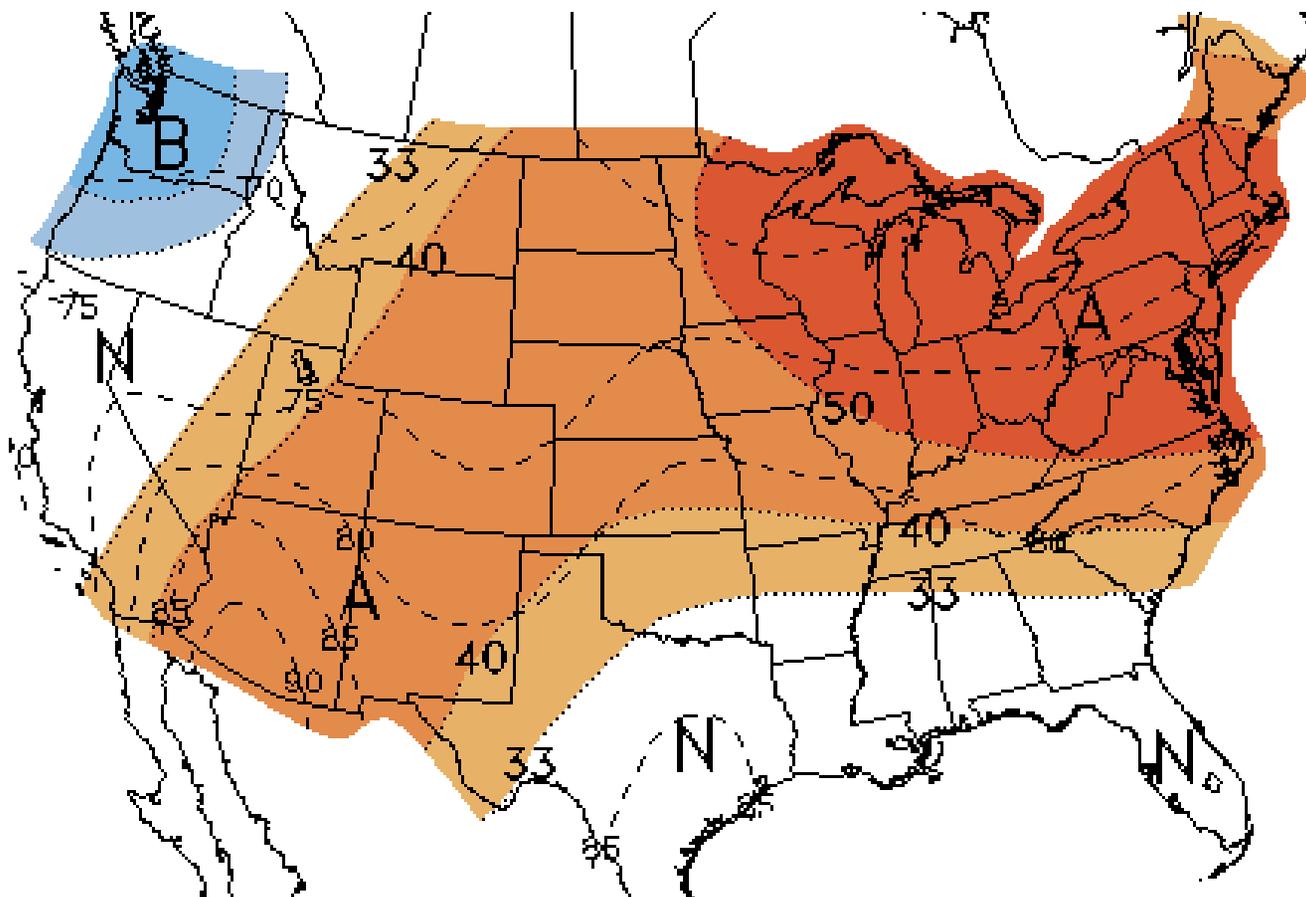


NOAA's Monthly Temperature Forecast Made June 30, Valid for July 2010



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.

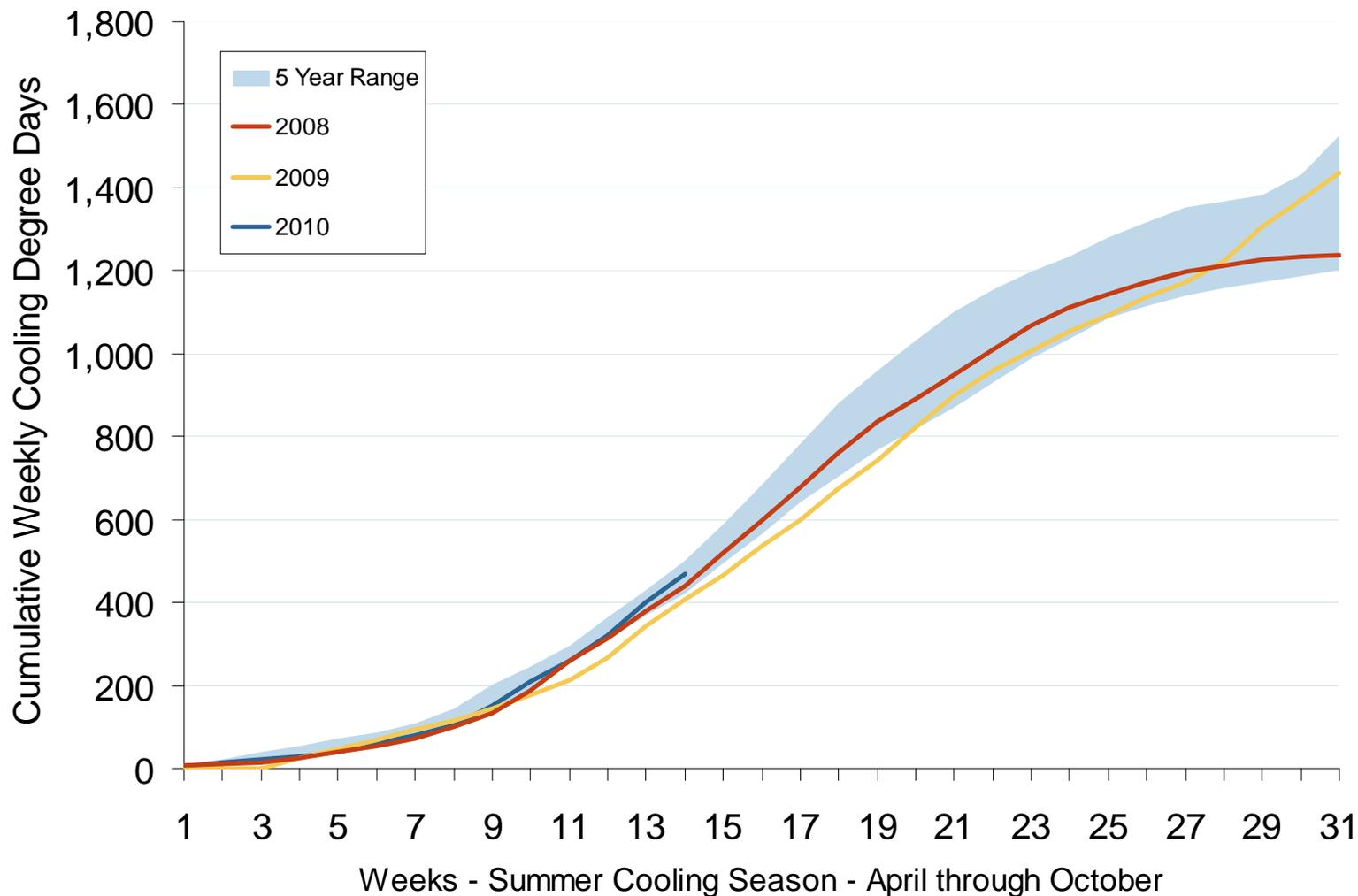
NOAA's 8 to 14 Day Temperature Forecast Made July 8, Valid for July 16 - 22, 2010



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

Source: NOAA

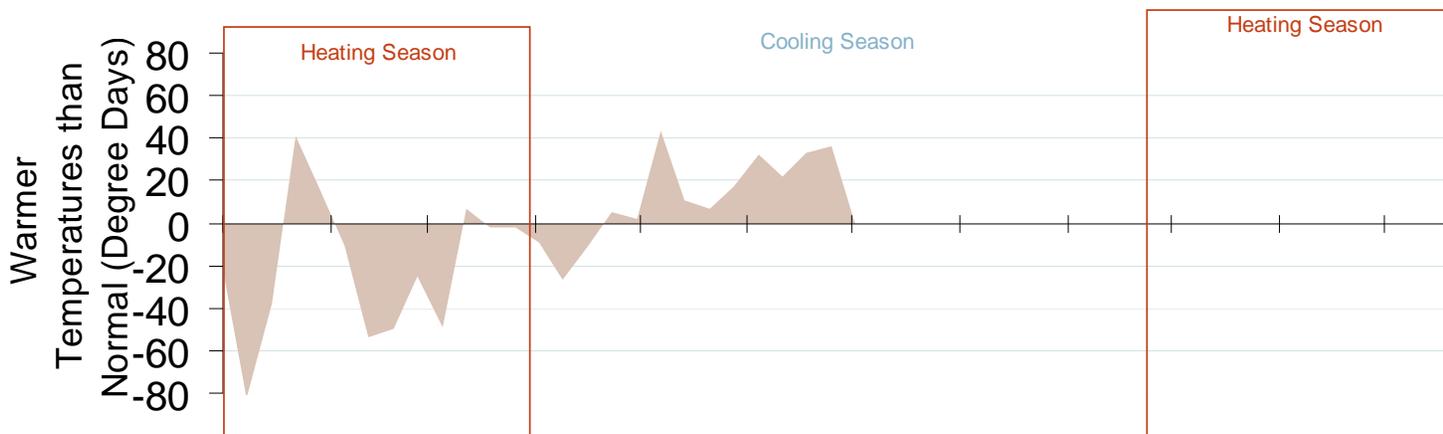
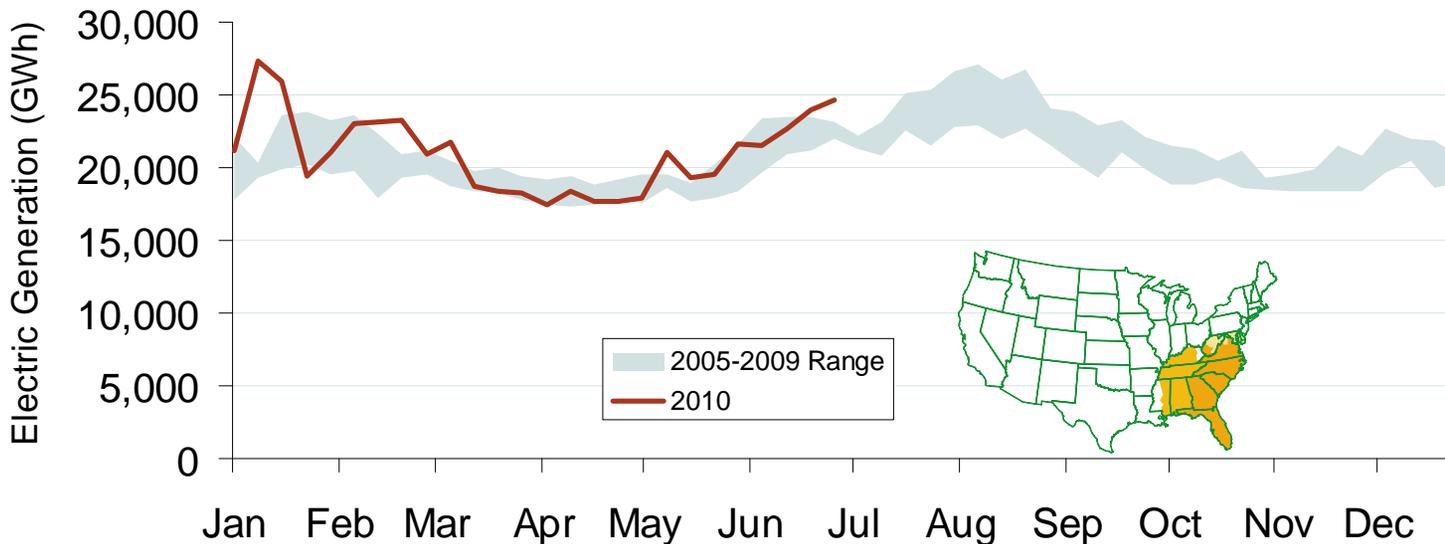
U. S. Summer Cumulative Cooling Degree Days - 2010



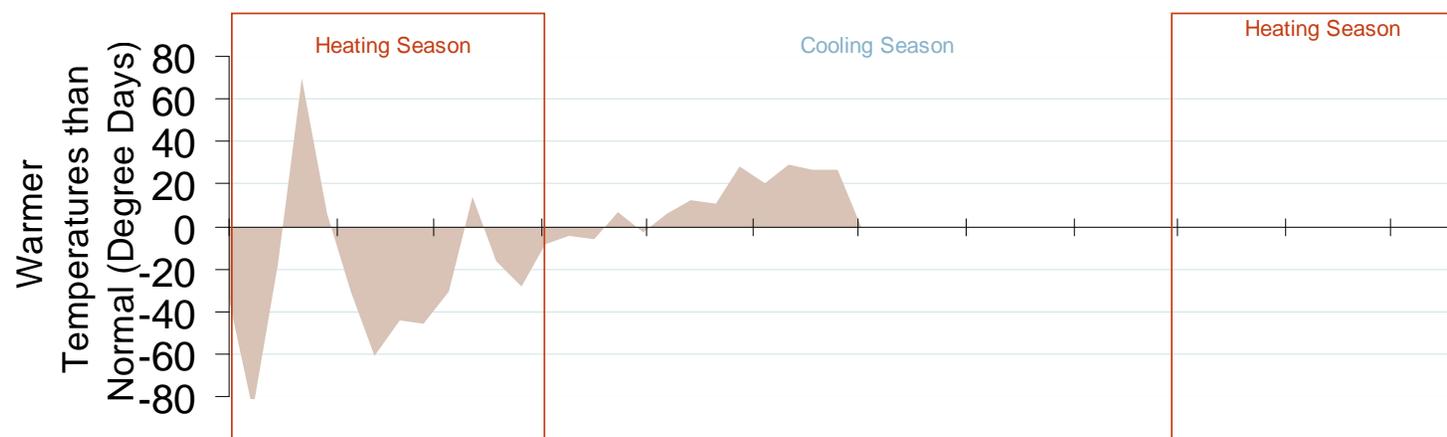
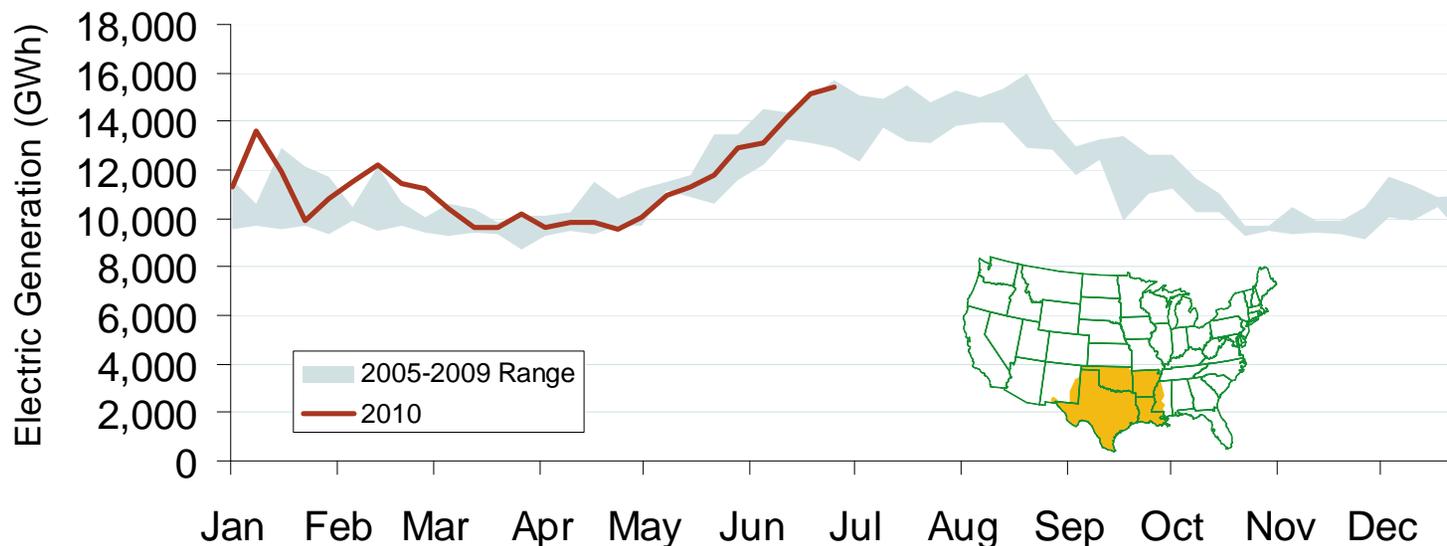
Source: Derived from NOAA data.

Updated July 9, 2010

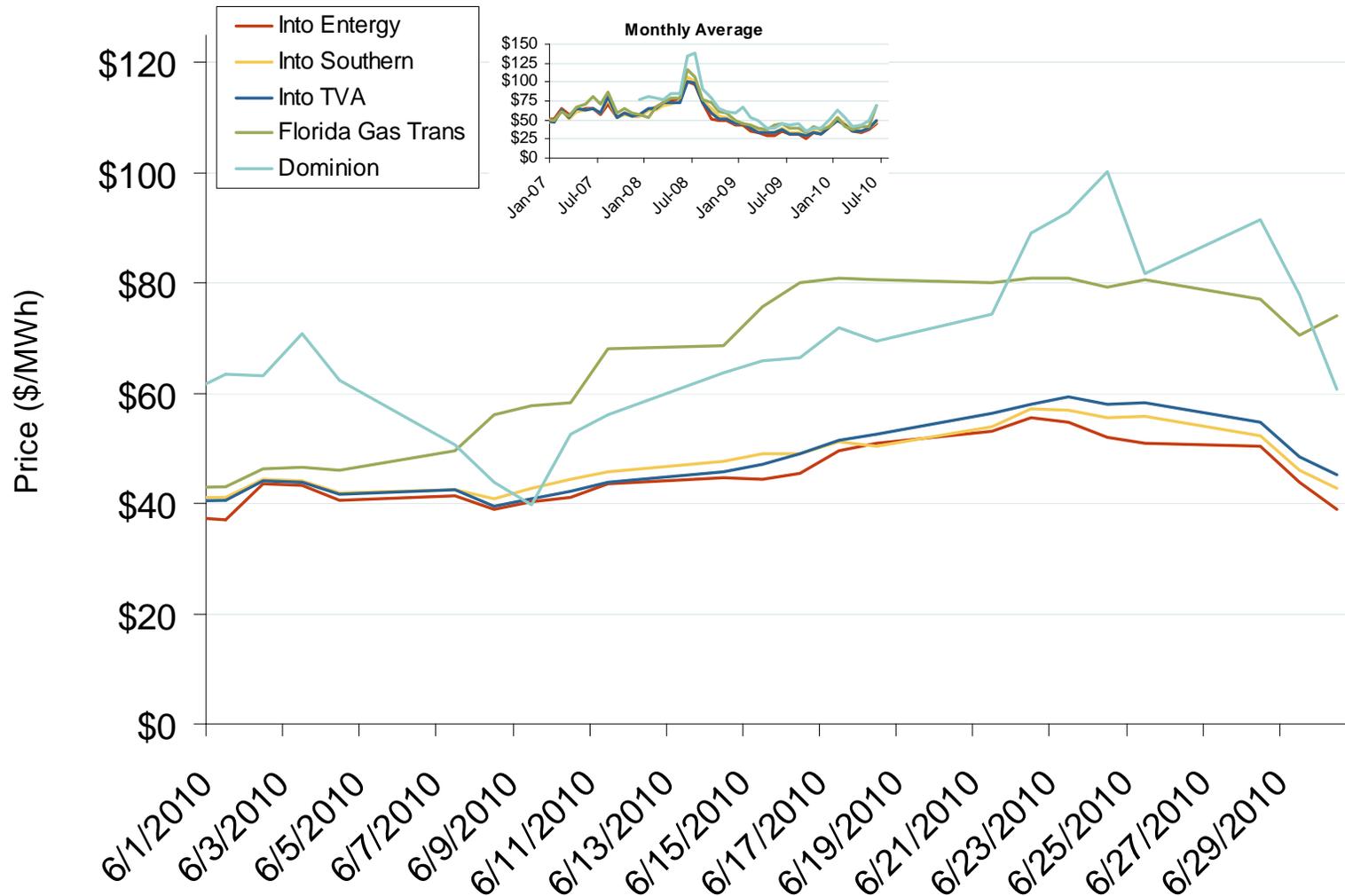
Weekly Electric Generation Output and Temperatures Southeast Region



Weekly Electric Generation Output and Temperatures South Central Region



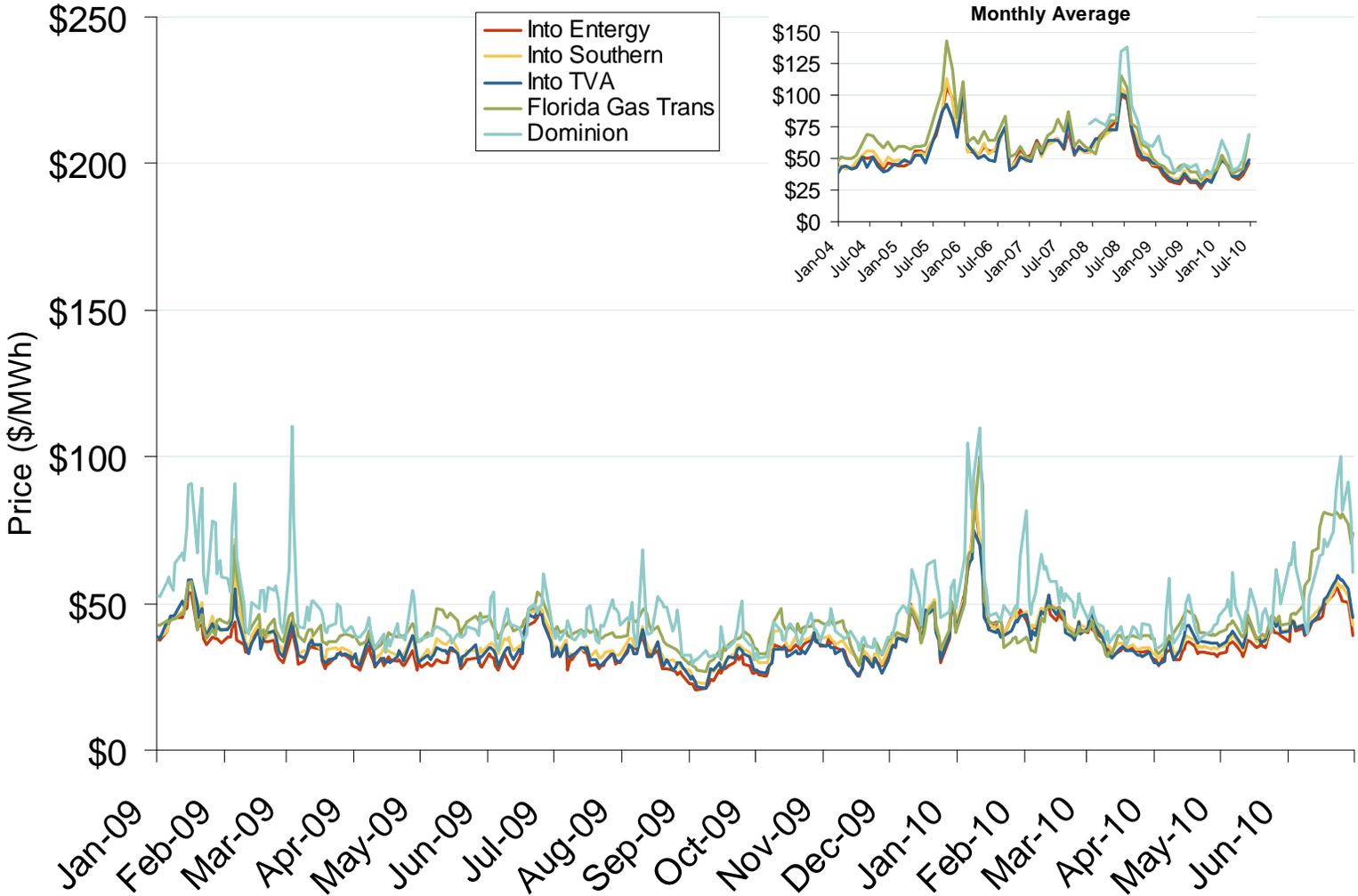
Southeastern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from Platts data.
July 2010 Southeast Snapshot Report

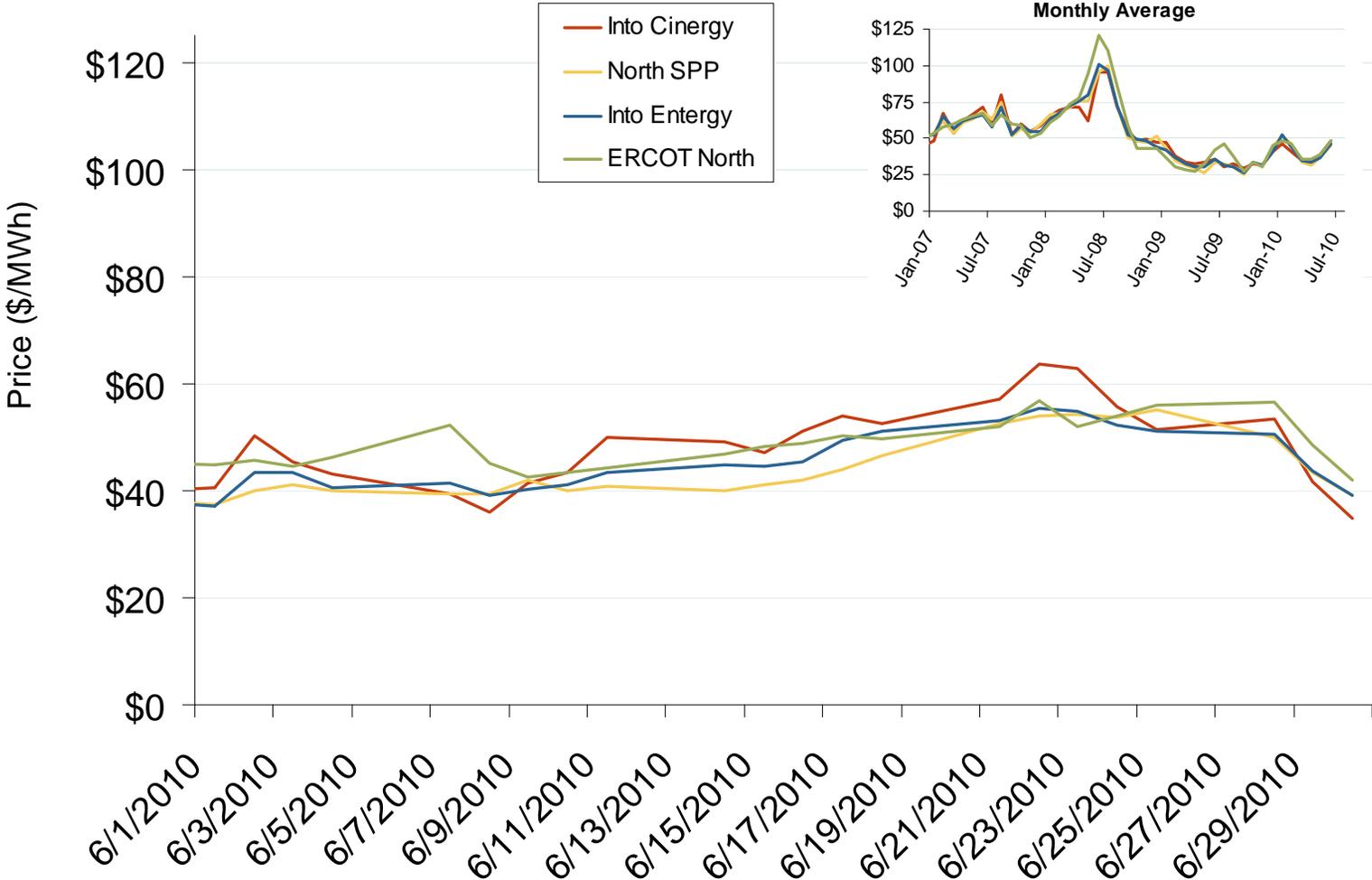
Updated July 9, 2010

Southeastern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data.

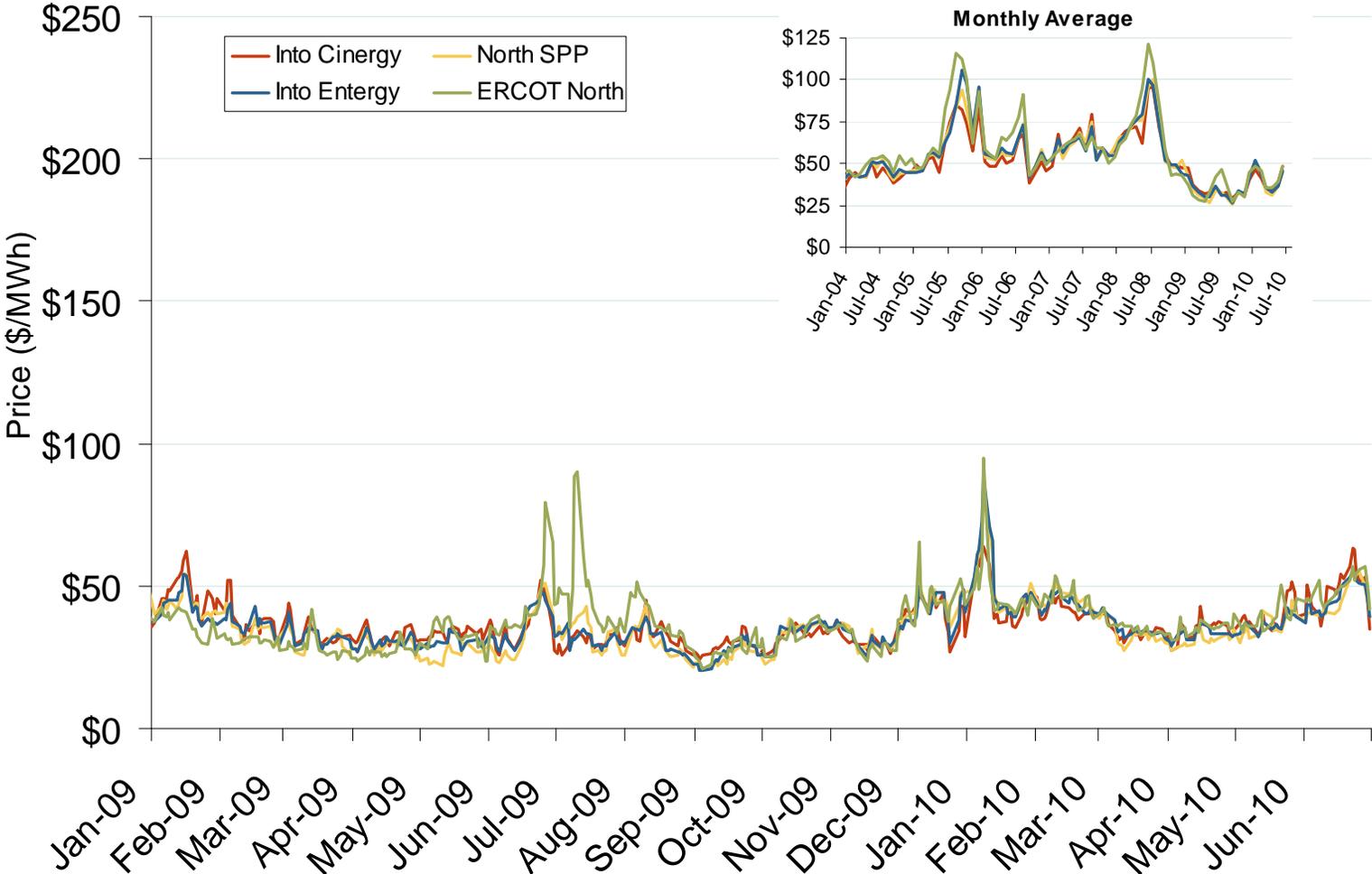
Midwestern Daily Bilateral Day-Ahead On-Peak Prices



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

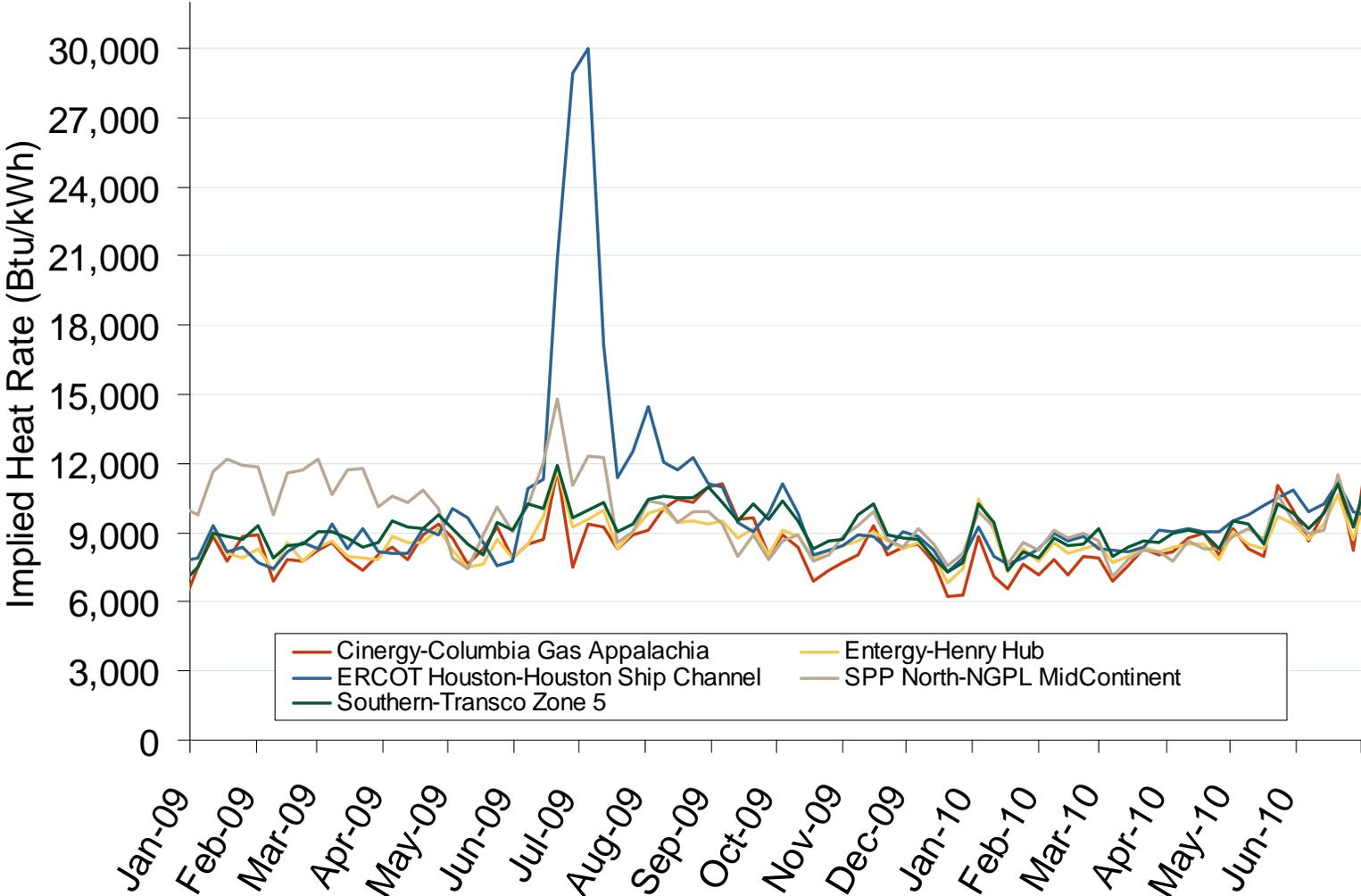
Updated July 9, 2010

Midwestern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data.

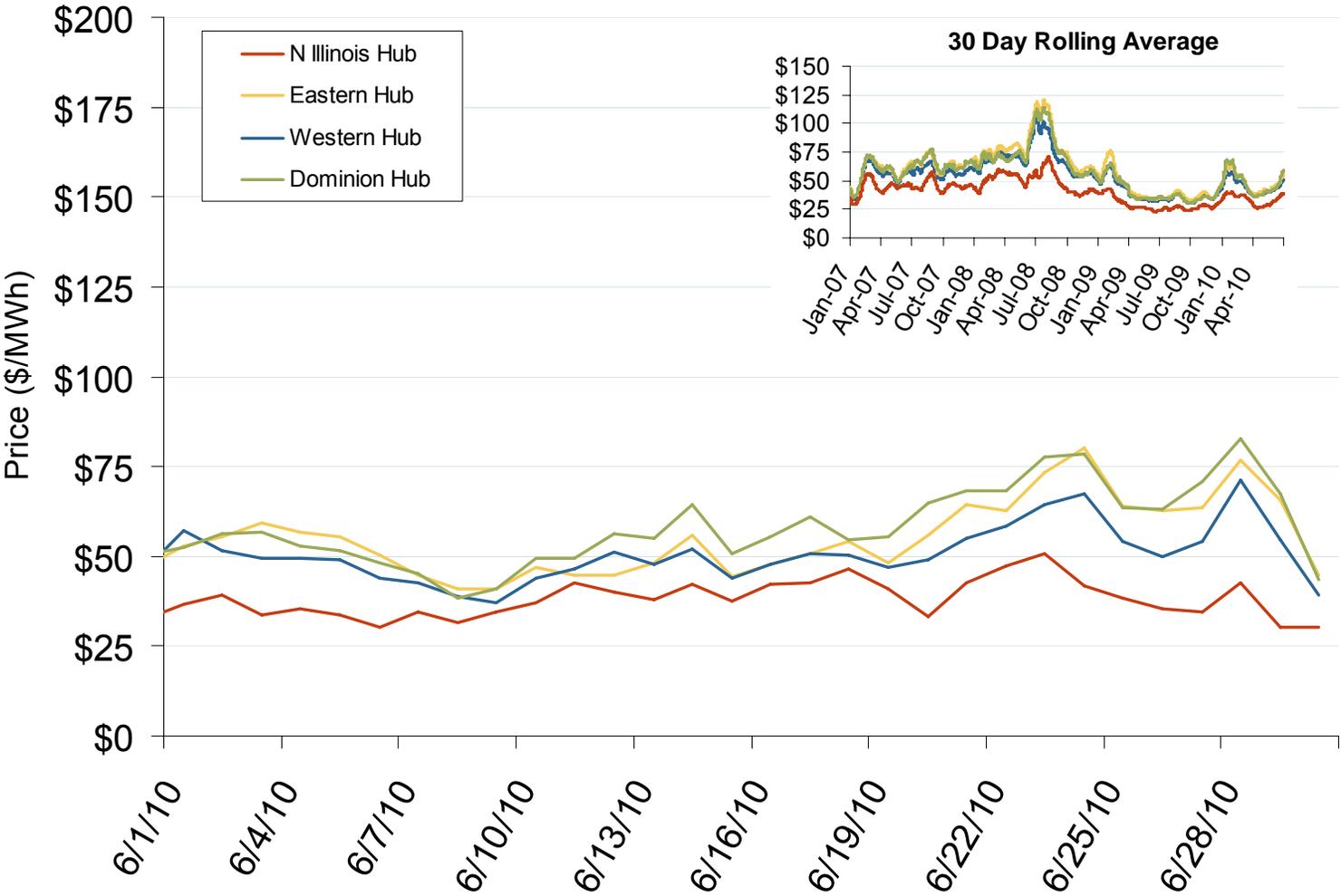
Implied Heat Rates at South Central Trading Points Weekly Averages



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

Updated July 9, 2010

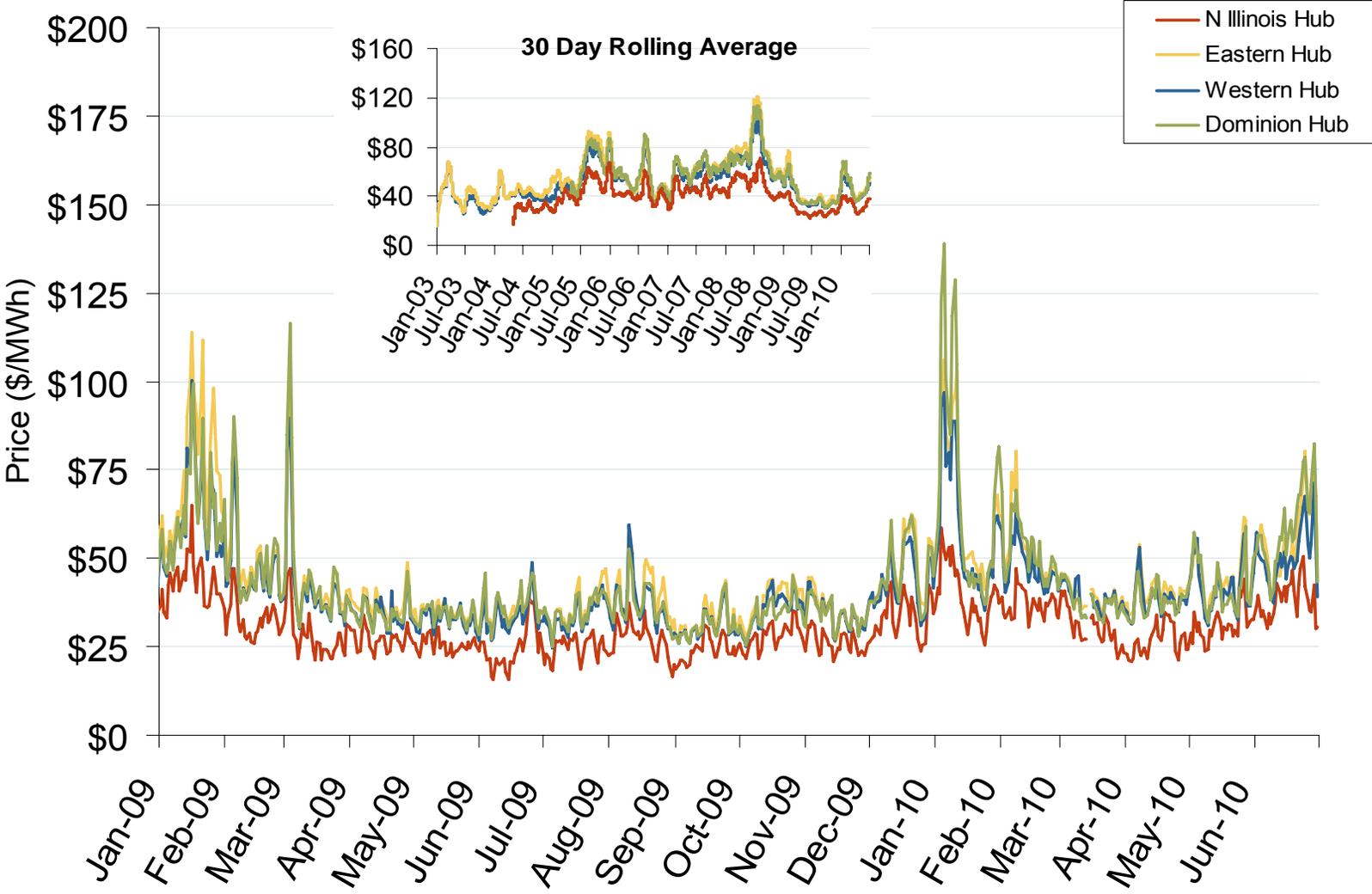
Daily Average of PJM Day-Ahead Prices - All Hours



Source: Derived by Bloomberg from PJM data as reported by Bloomberg.
July 2010 Southeast Snapshot Report

Updated July 9, 2010

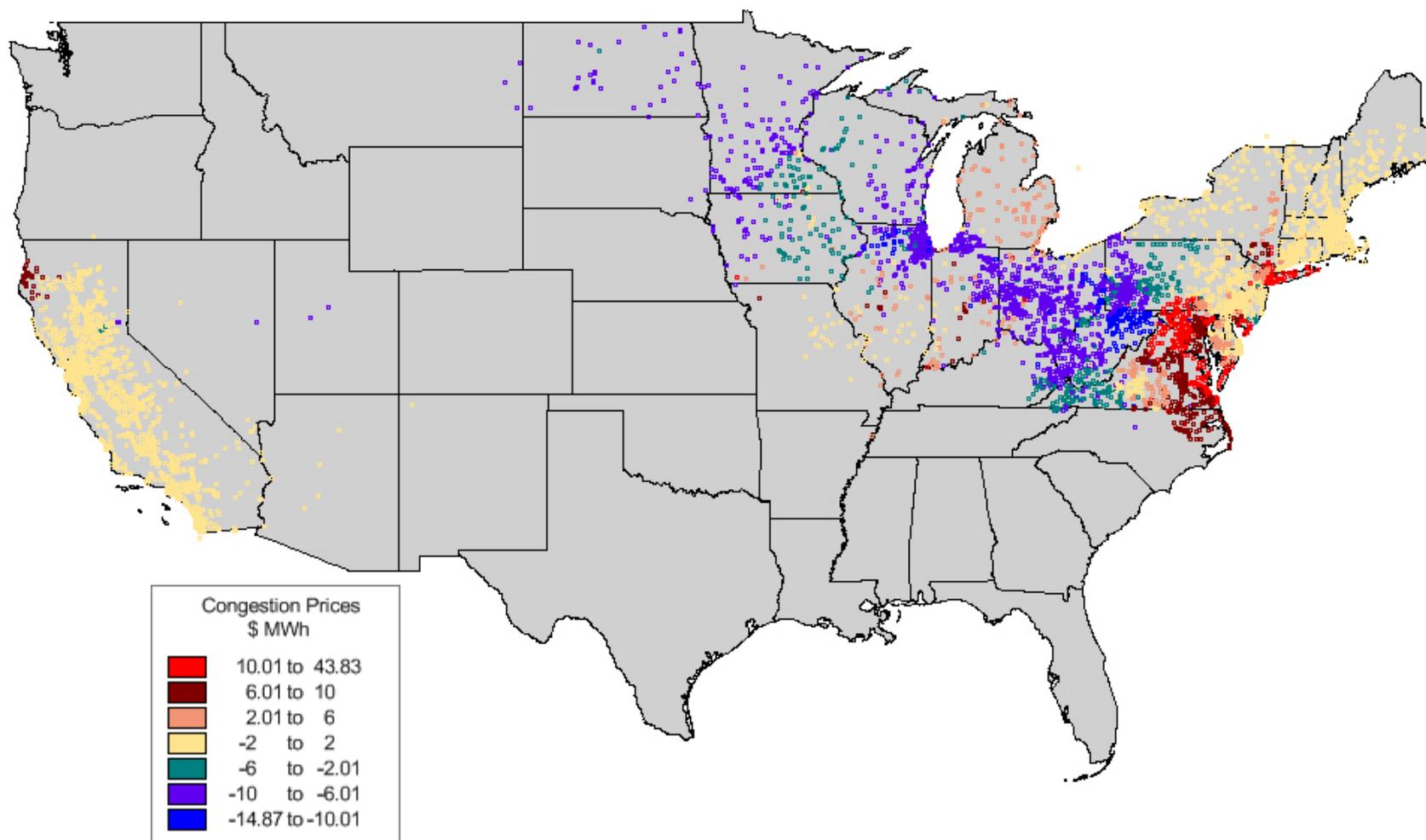
Daily Average of PJM Day-Ahead Prices - All Hours



Source: Derived by Bloomberg from PJM data as reported by Bloomberg.

Updated July 9, 2010

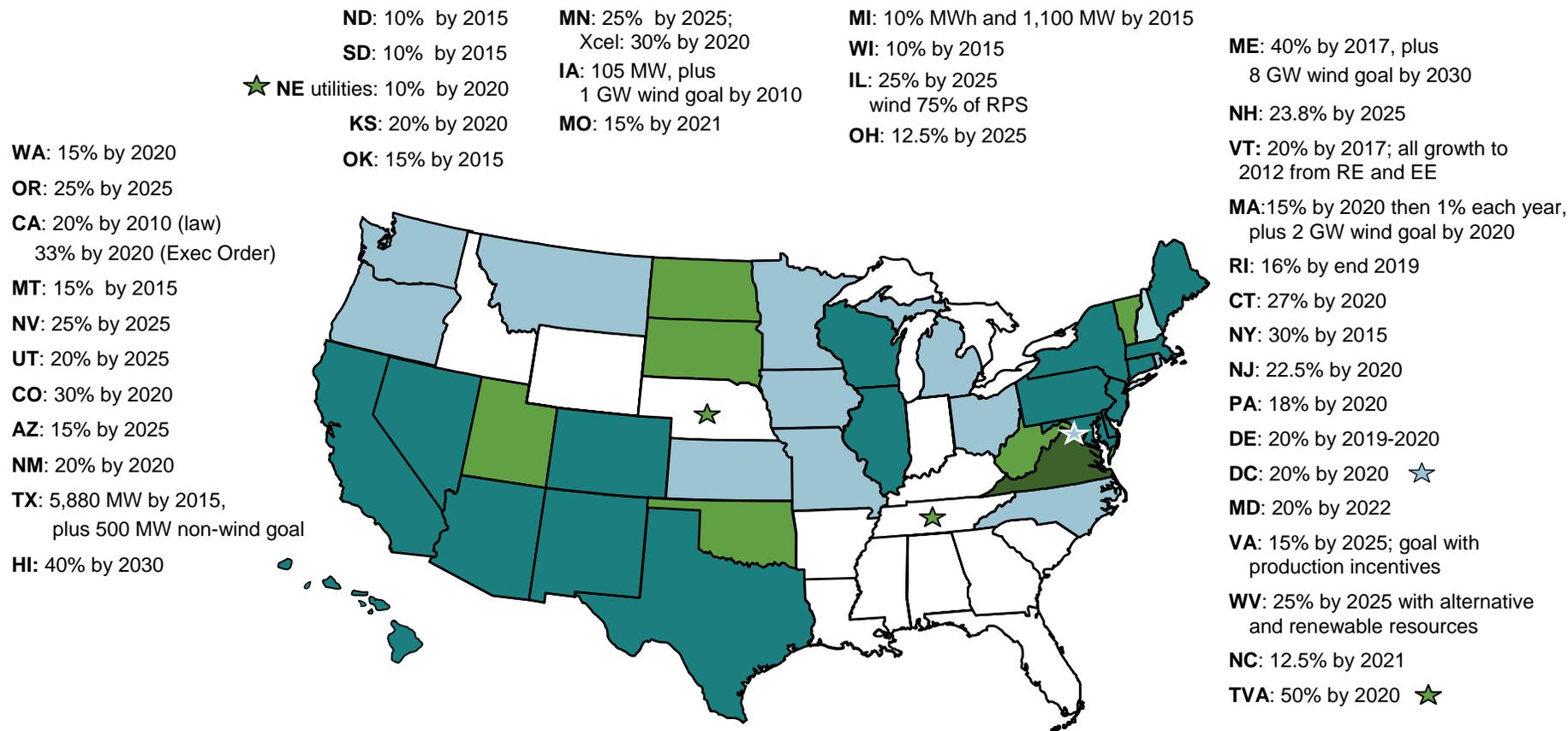
Day Ahead On-Peak Congestion Average Monthly Prices June 2010



Renewable Power & Energy Efficiency Market: Renewable Portfolio Standards

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



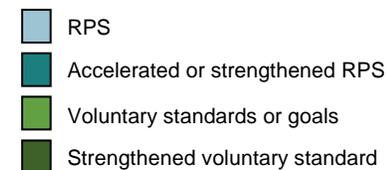
Updates at: <http://www.ferc.gov/market-oversight/othr-mkts/renew.asp>

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.

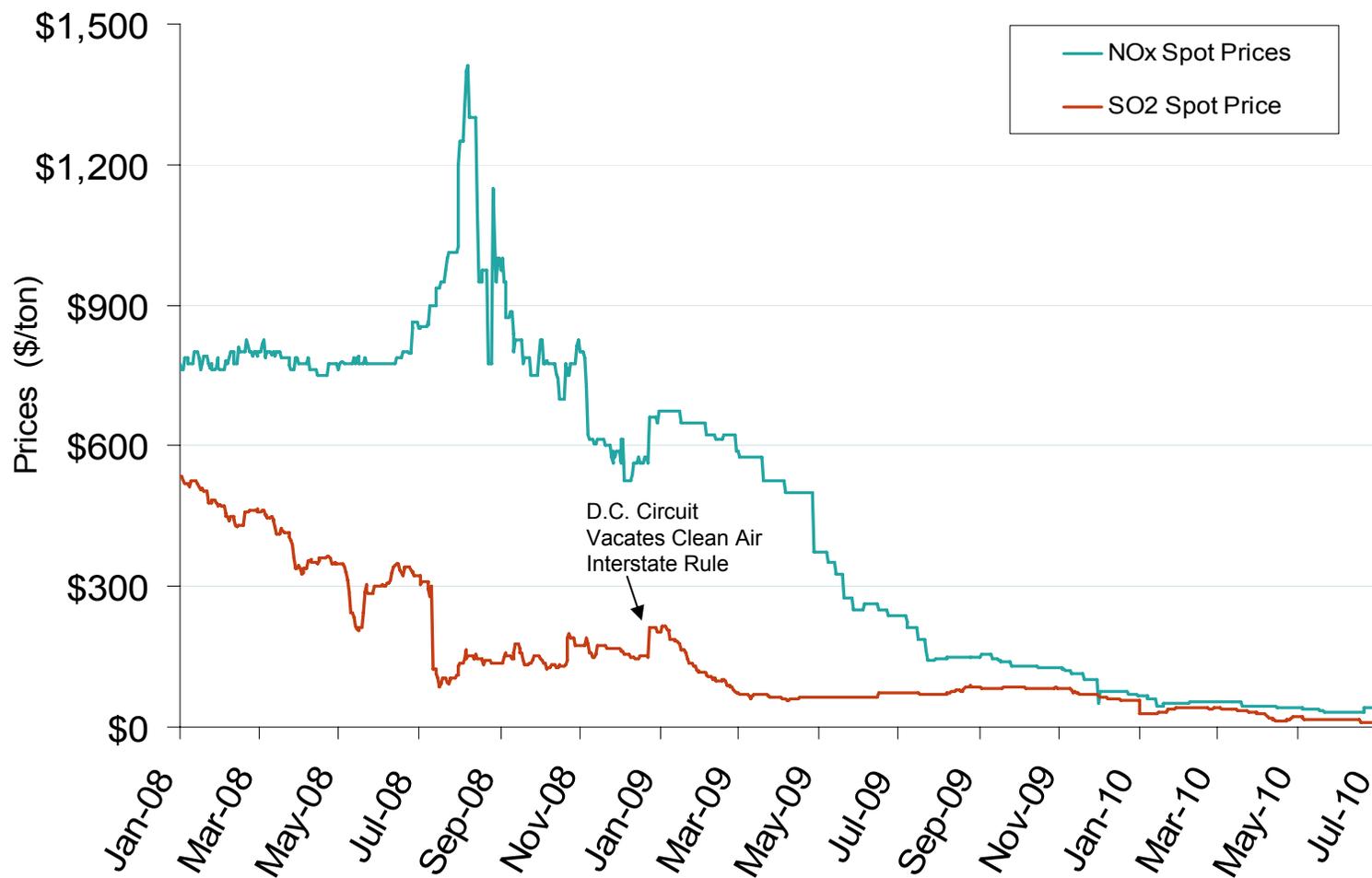
TVA's goal is not state policy; it calls for 50% zero- or low-carbon generation by 2020.

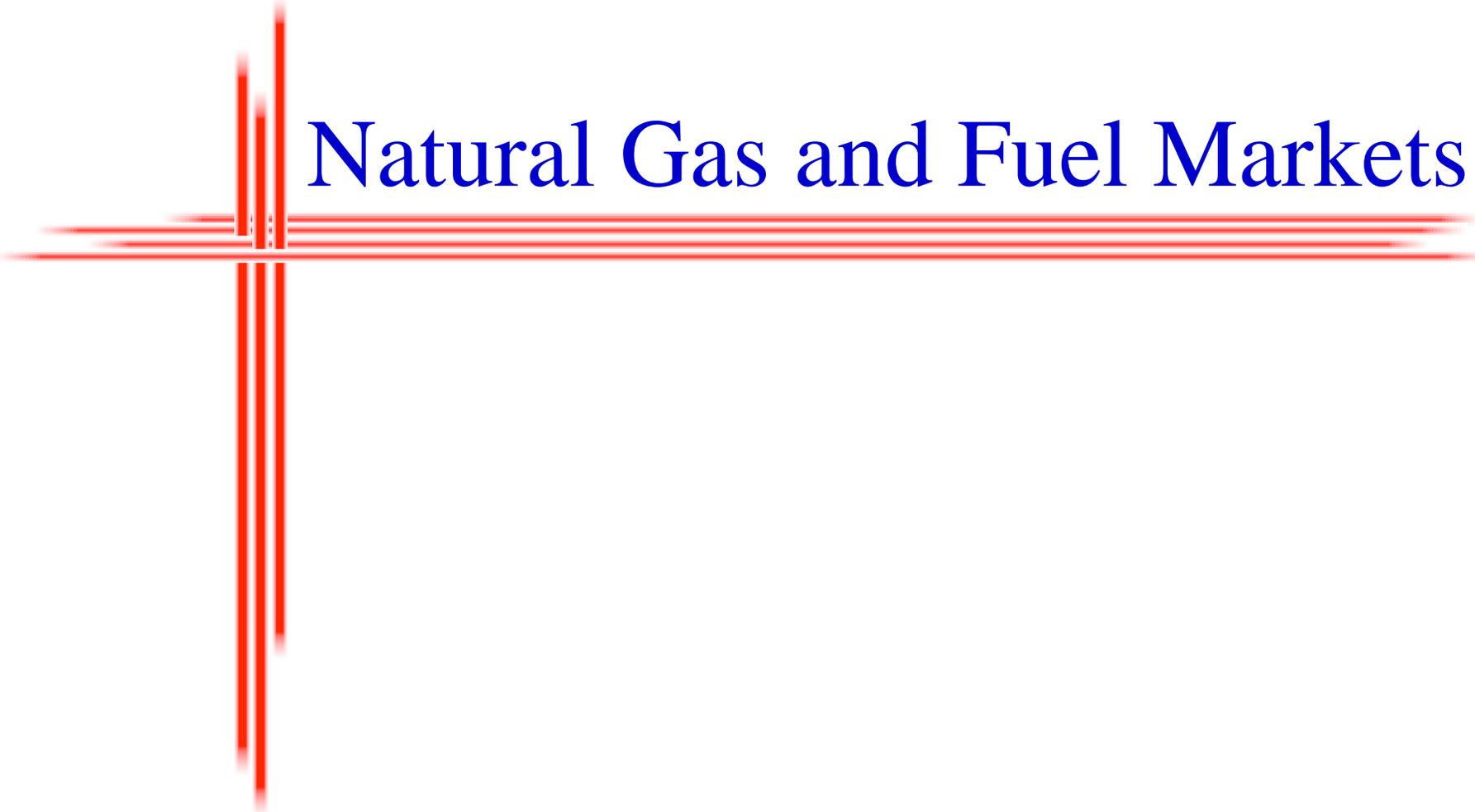
Sources: Derived from data in: LBNL, PUCs, State legislative tracking services, Pew Center. Details, including timelines, are in the Database of State Incentives for Renewables and Energy Efficiency: <http://www.dsireusa.org>



Updated June 29, 2010

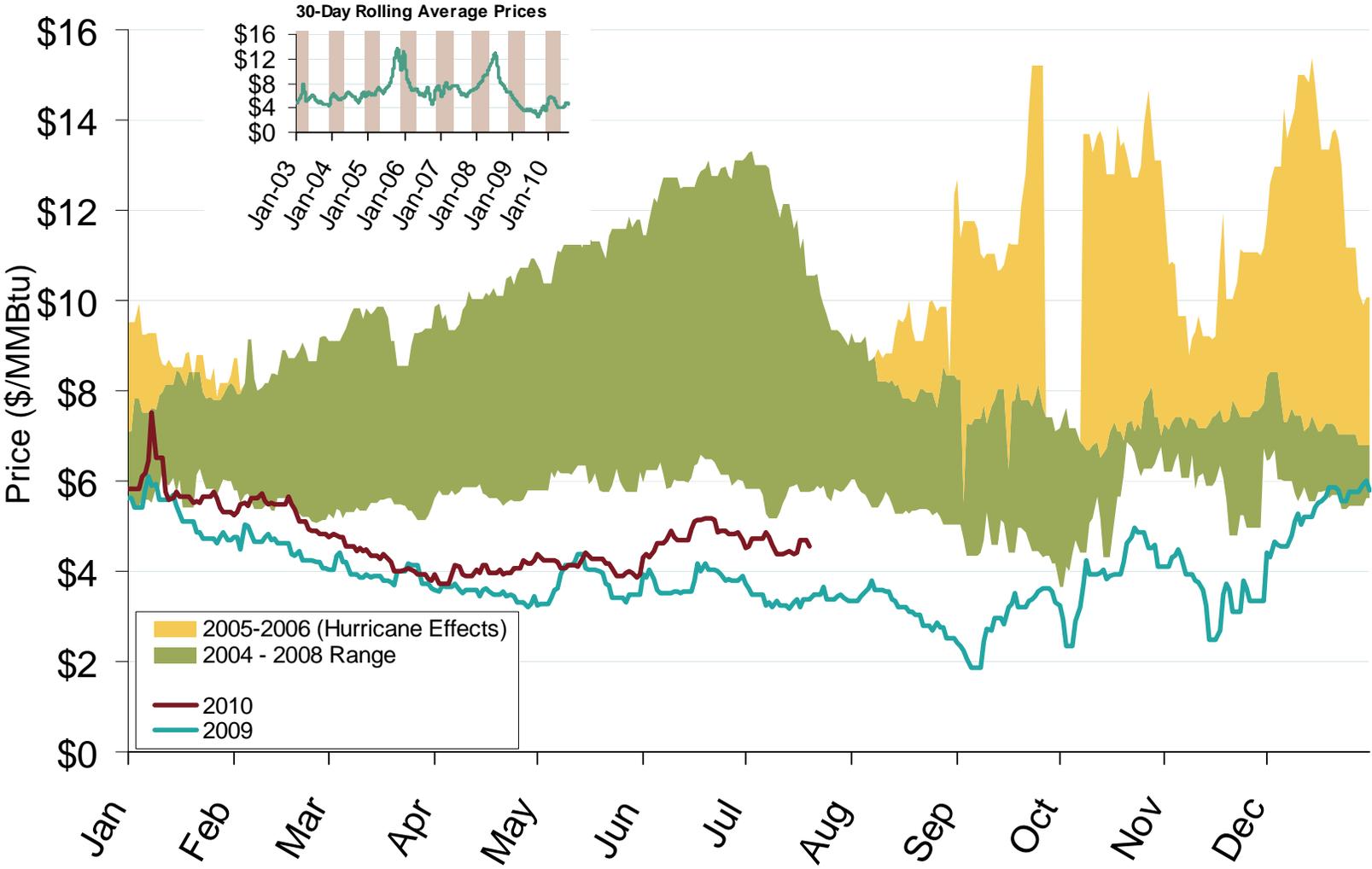
SO₂ Allowance Spot Prices and NOx Seasonal Allowance Spot Prices





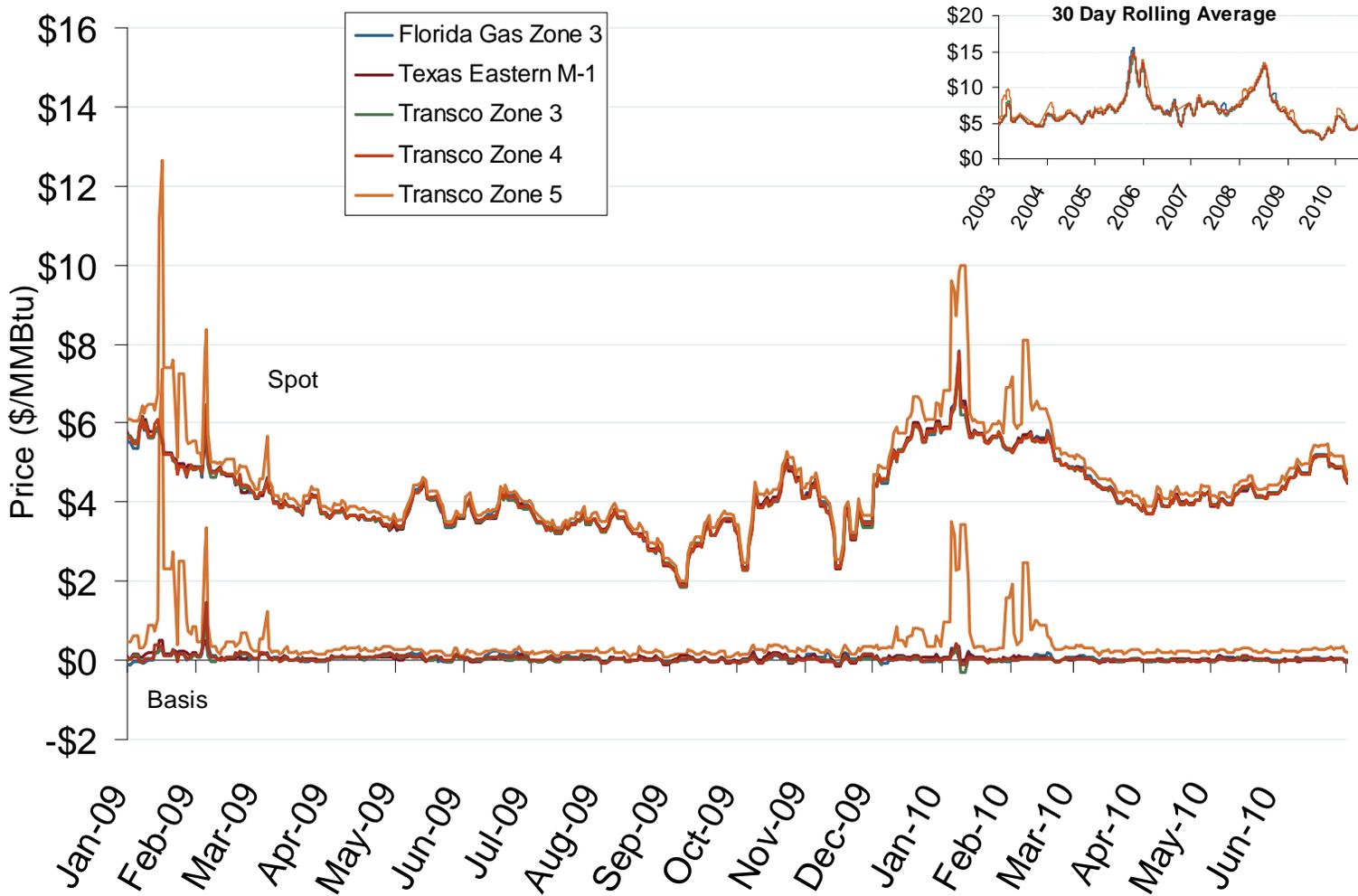
Natural Gas and Fuel Markets

Henry Hub Natural Gas Daily Spot Prices



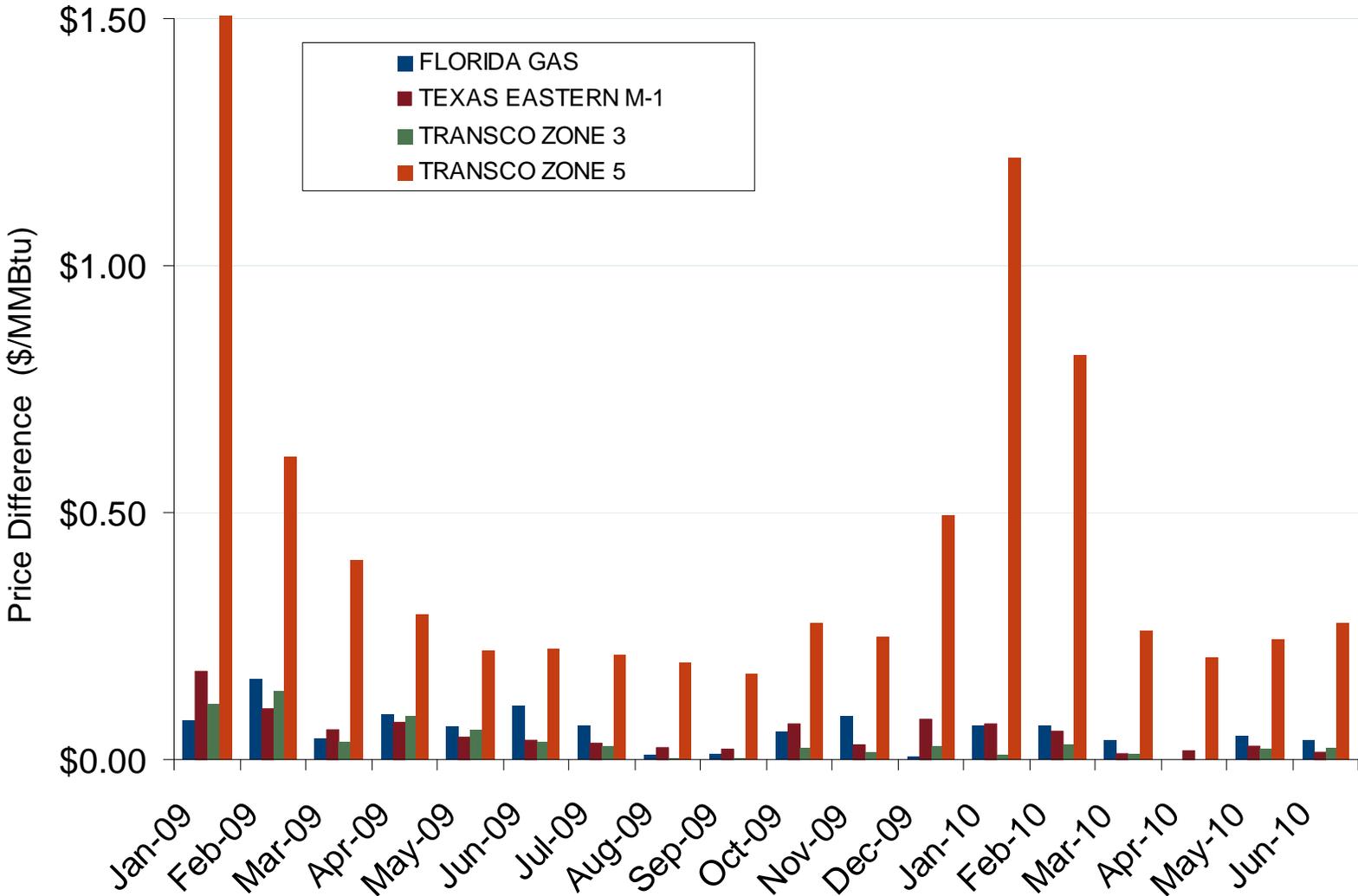
Source: Derived from *Platts* data.
July 2010 Southeast Snapshot Report

Southeastern Day-Ahead Hub Spot Prices and Basis



Source: Derived from *Platts* data.

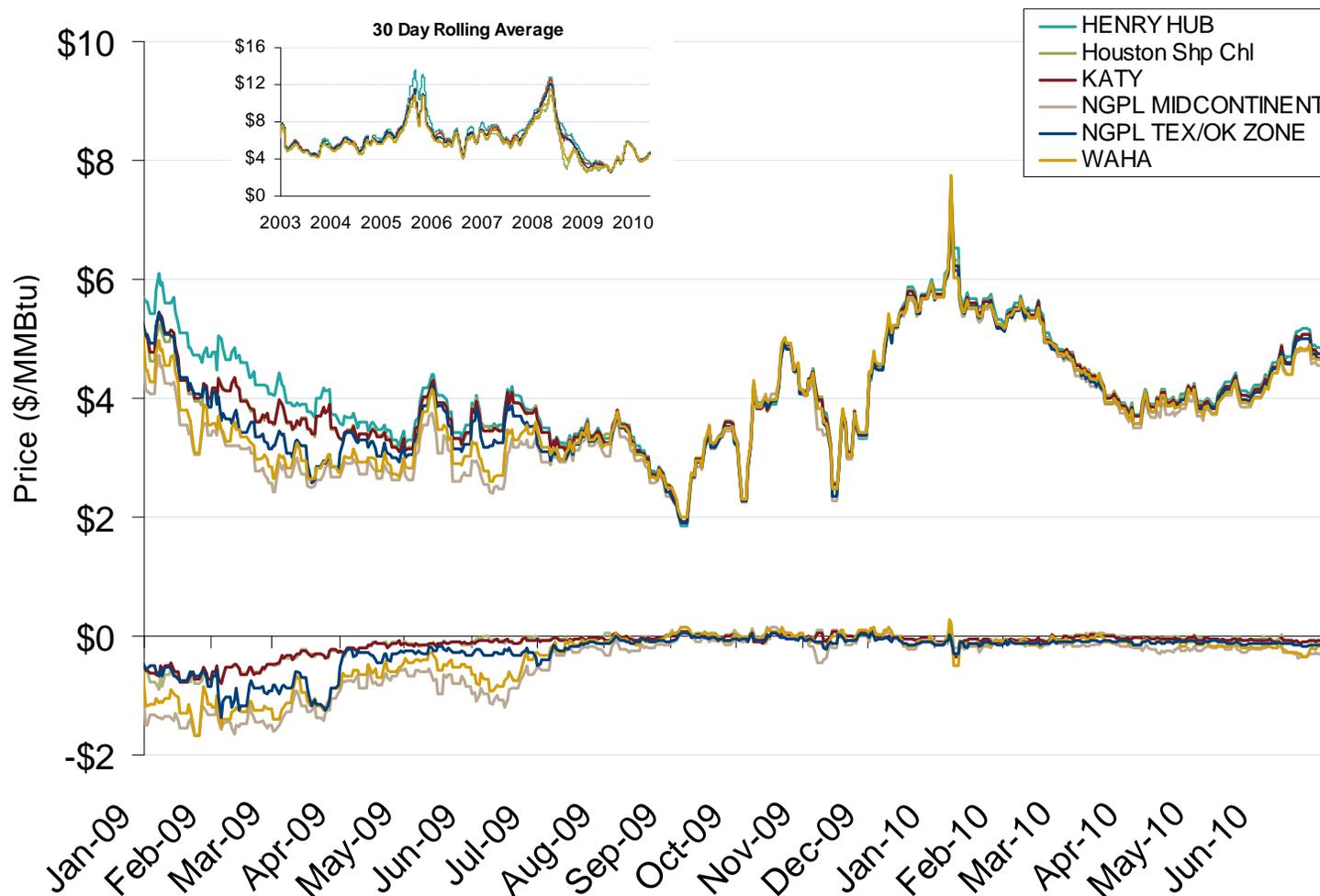
Southeastern Monthly Average Basis Value to Henry Hub



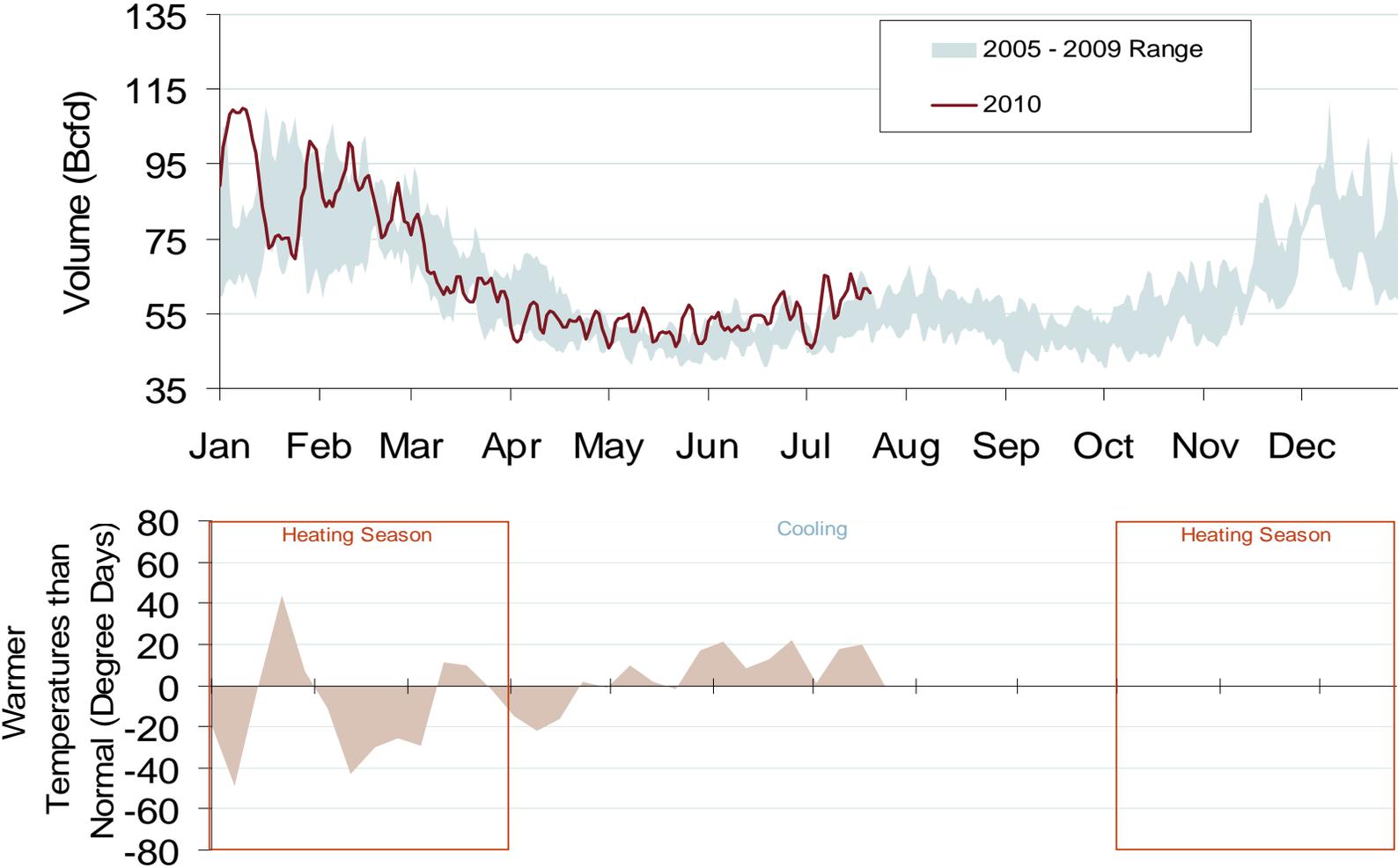
Source: Derived from Platts data.
July 2010 Southeast Snapshot Report

Updated July 9, 2010

Gulf Day-Ahead Hub Spot Prices and Basis



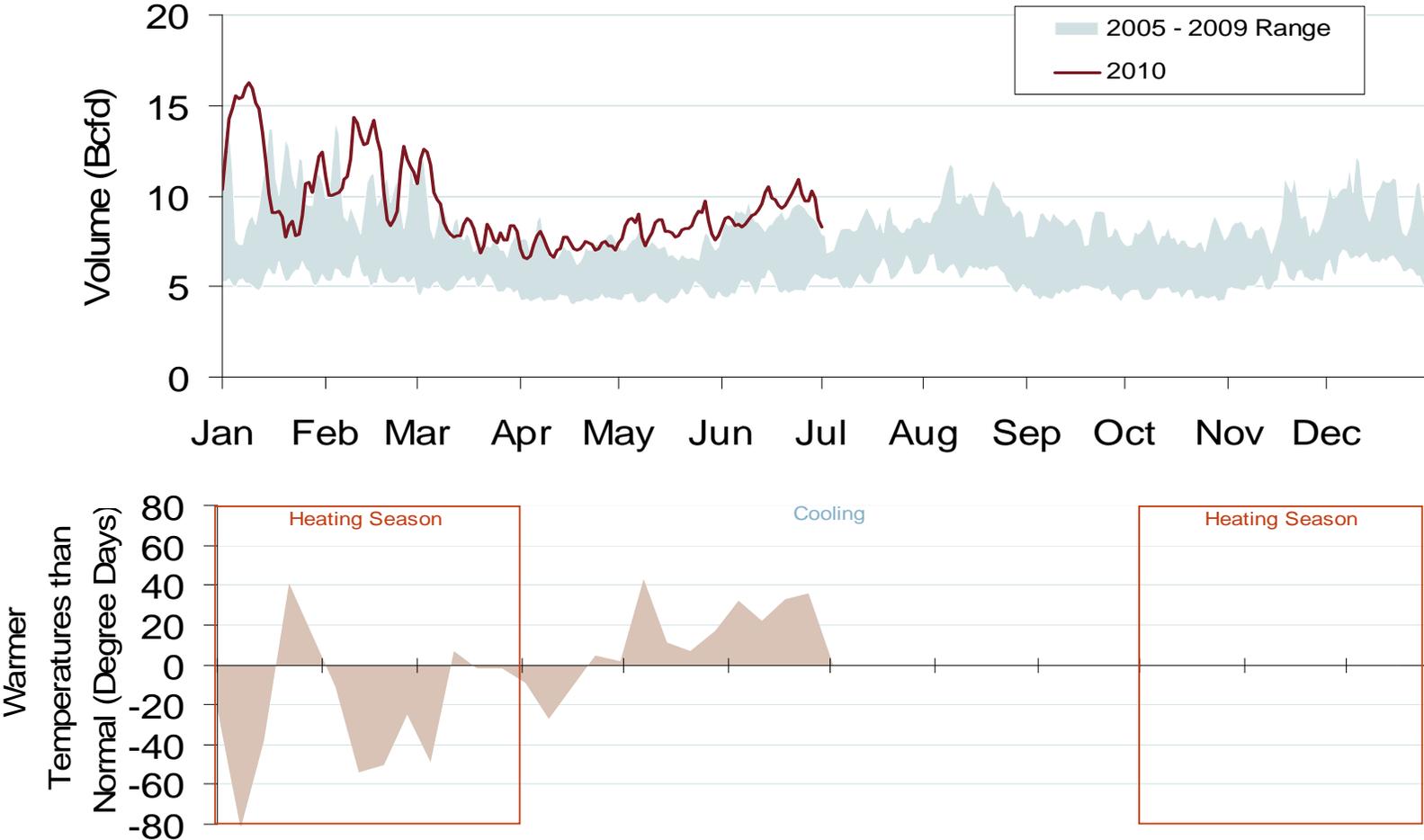
Total U.S. Natural Gas Demand (All Sectors) and Temperatures



Source: Derived from Bentek Energy and Weekly NOAA data.
July 2010 Southeast Snapshot Report

Updated July 21, 2010

Daily Southeast Natural Gas Demand All Sectors



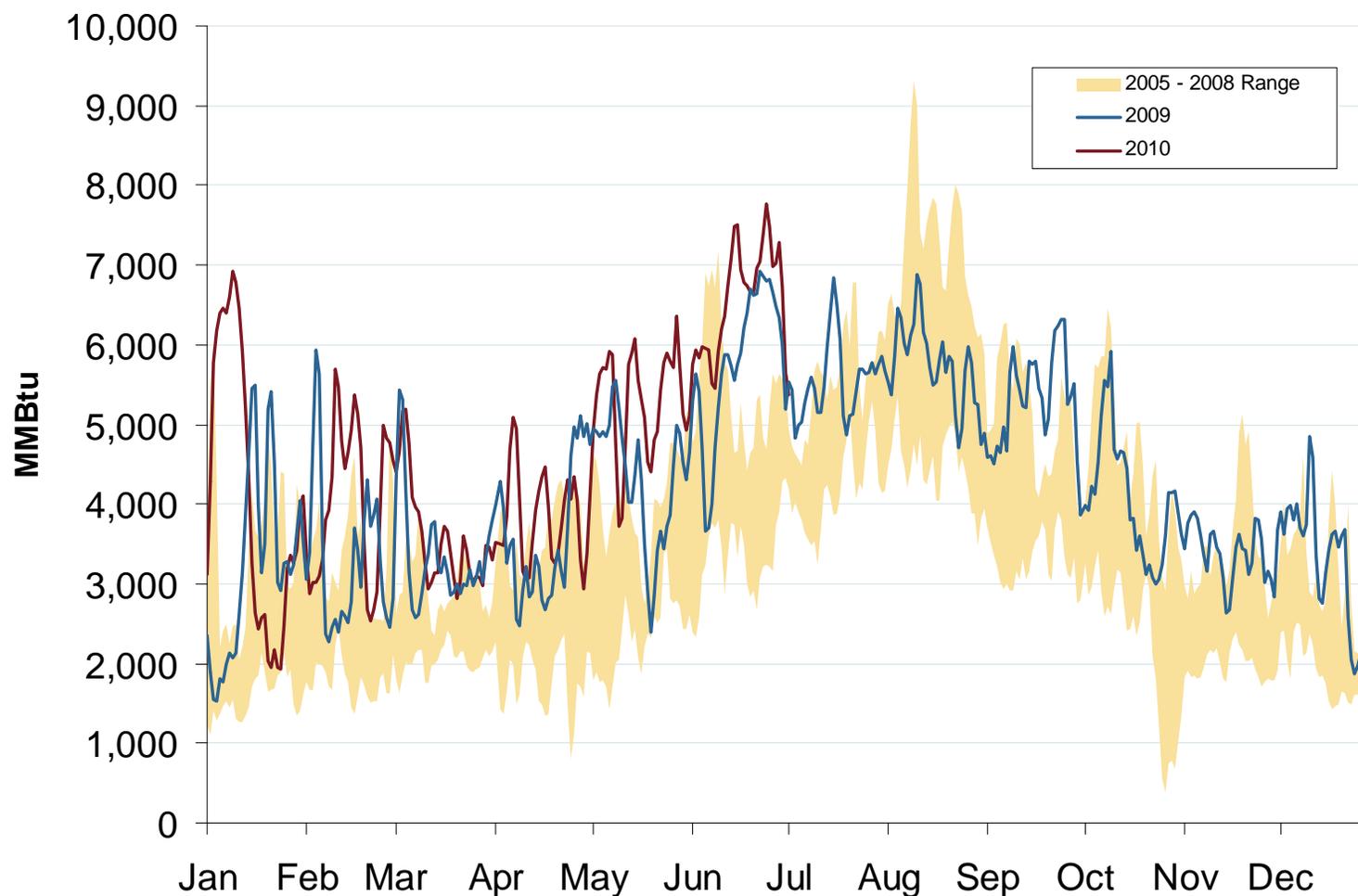
Source: Derived from Bentek Energy and Weekly NOAA data.
July 2010 Southeast Snapshot Report

Updated July 9, 2010

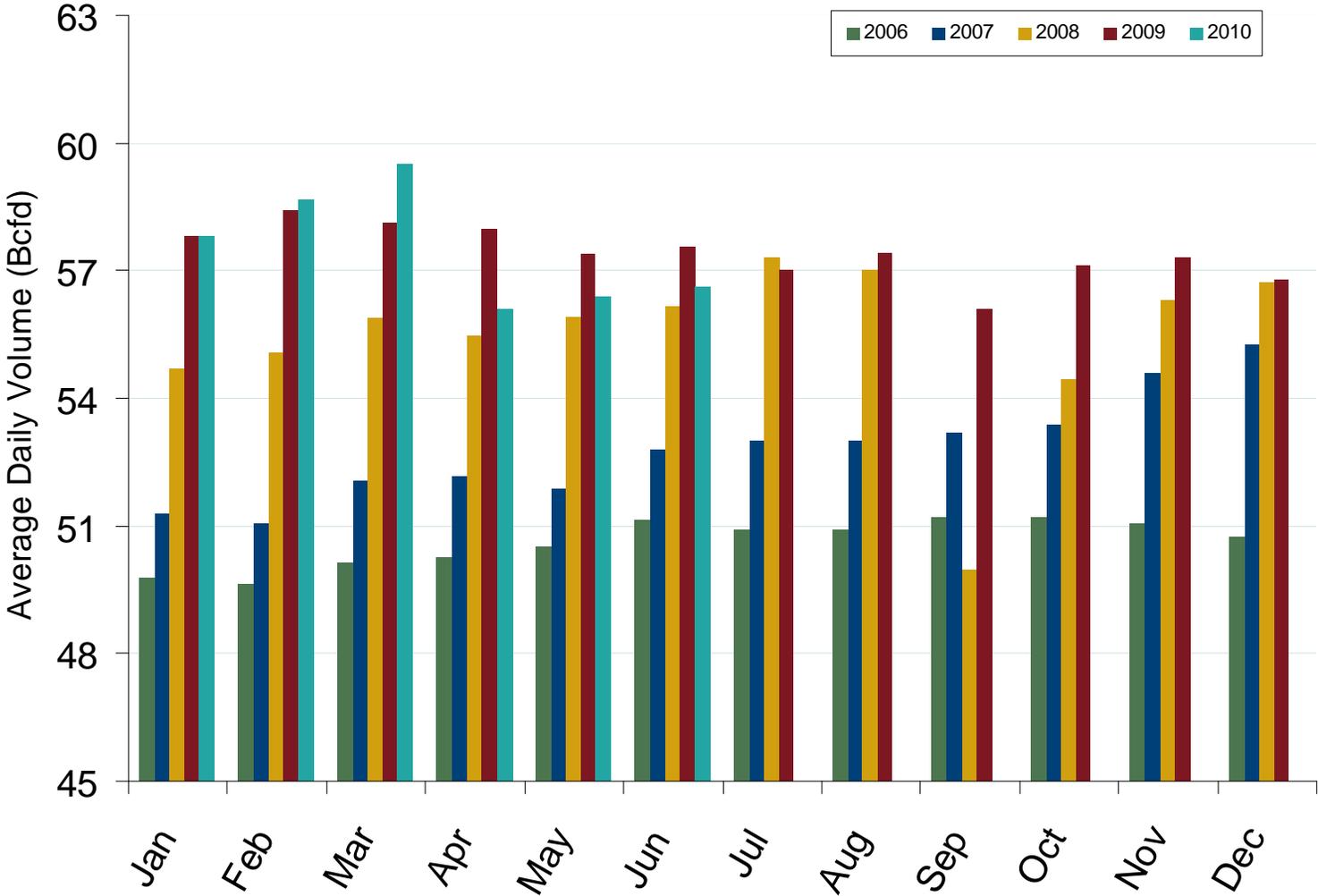
Southeast Natural Gas Market: NG Consumption for Power Generation

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Southeast Natural Gas Consumption for Power Generation



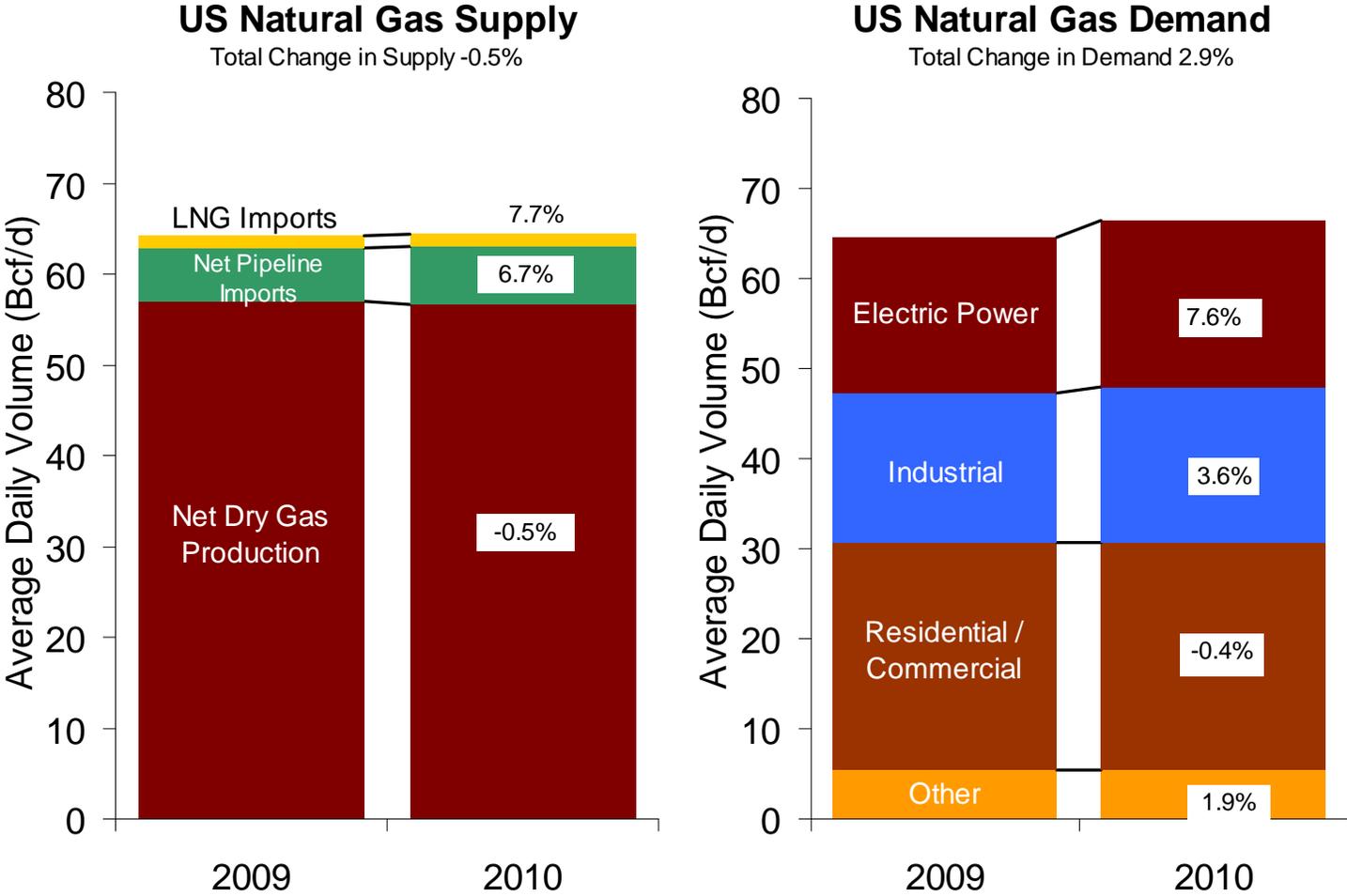
U.S. Dry Gas Production



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

Updated July 9, 2010

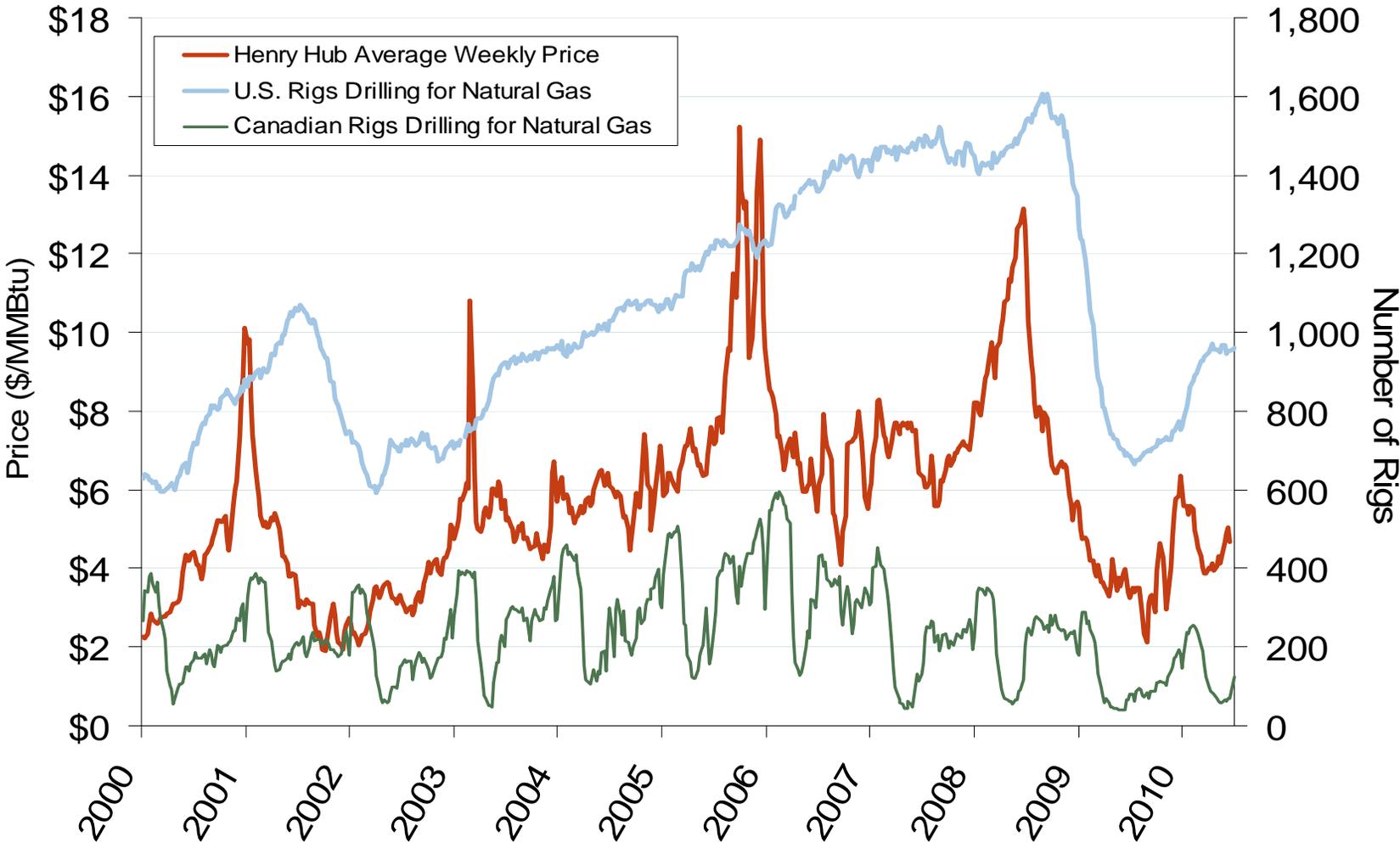
U.S. Natural Gas Supply and Demand 2009 vs. 2010: January - June



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

Updated July 9, 2010

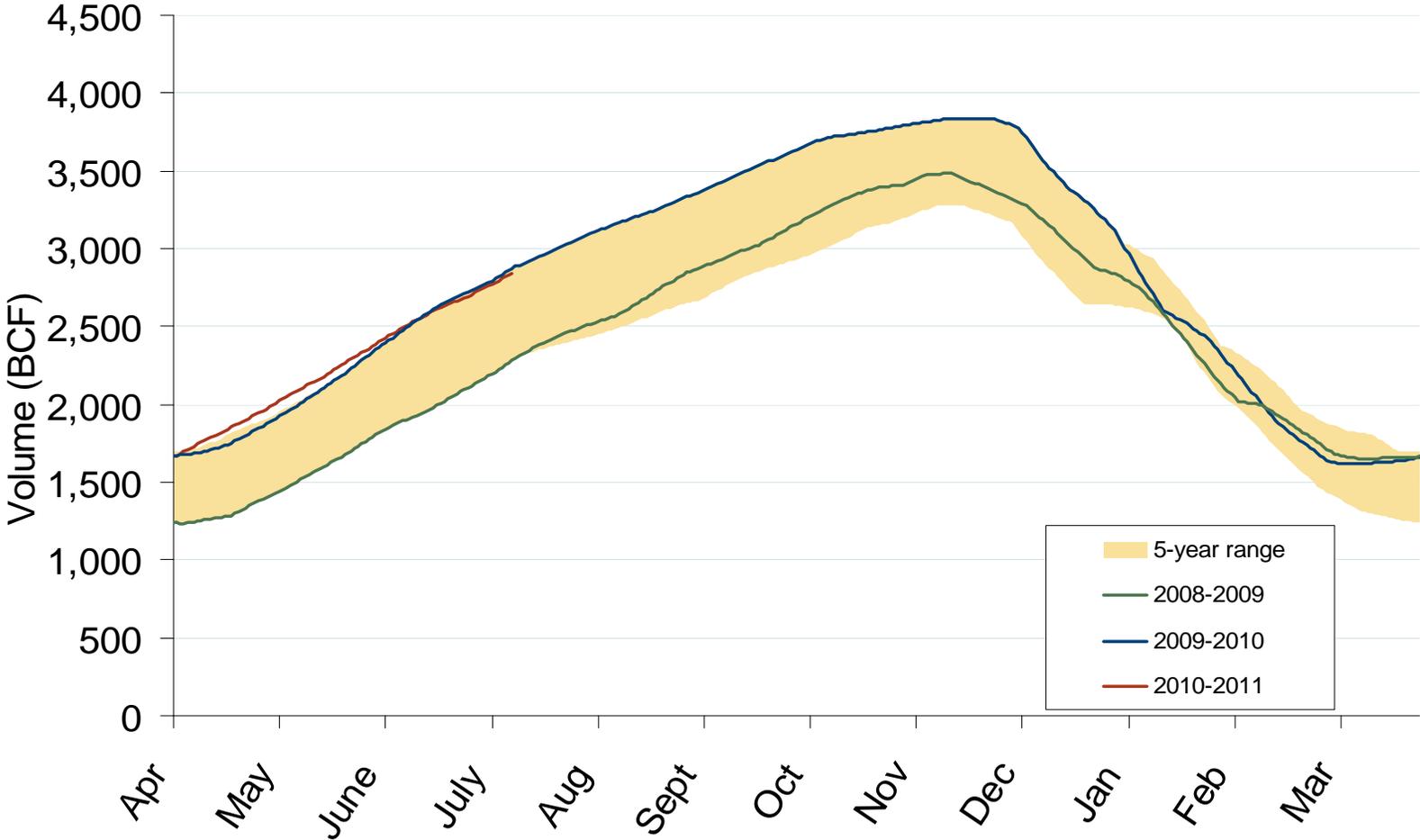
U.S. and Canadian Natural Gas Drilling Rig Count and Daily Spot Prices



Source: Derived from *Platts* and *Baker Hughes* data.
July 2010 Southeast Snapshot Report

Updated July 9, 2010

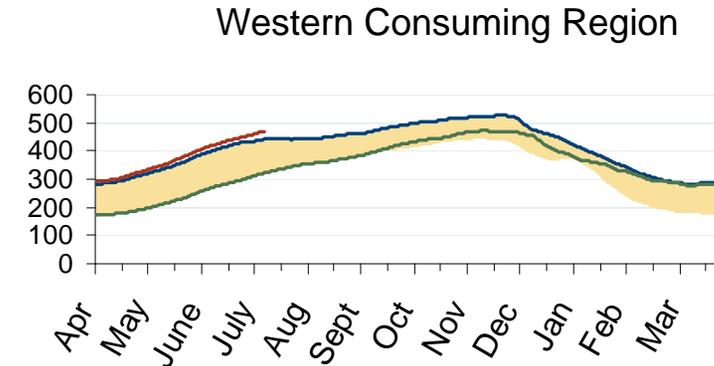
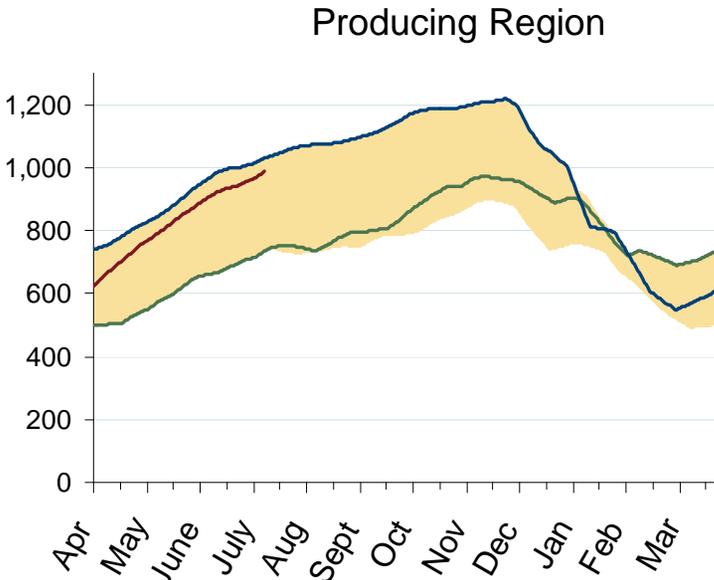
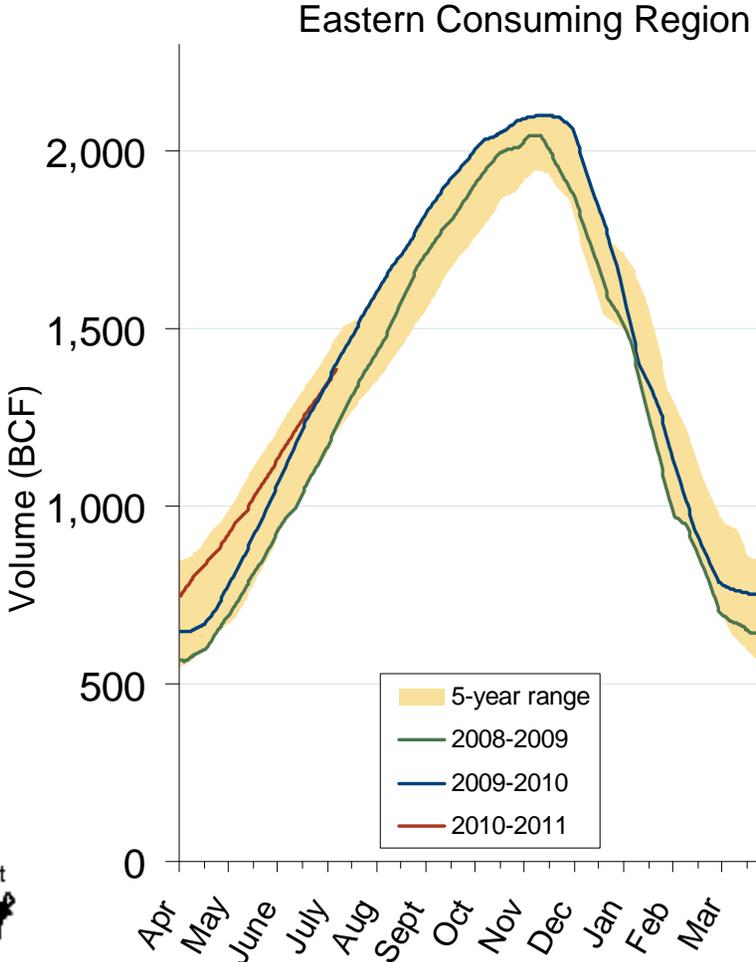
Total U.S. Working Gas in Storage



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

Updated July 15, 2010

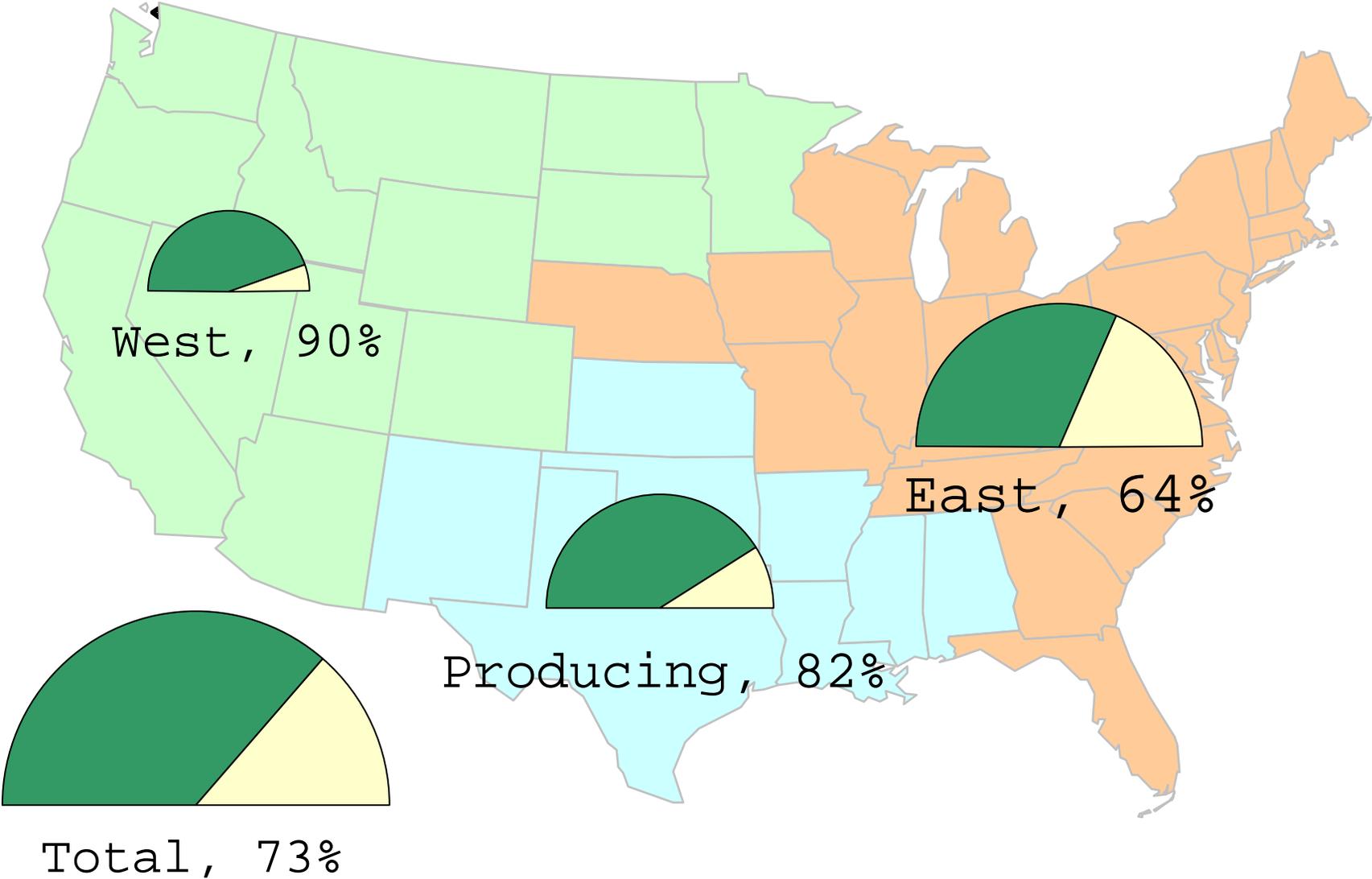
Regional Totals of Working Gas in Storage



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

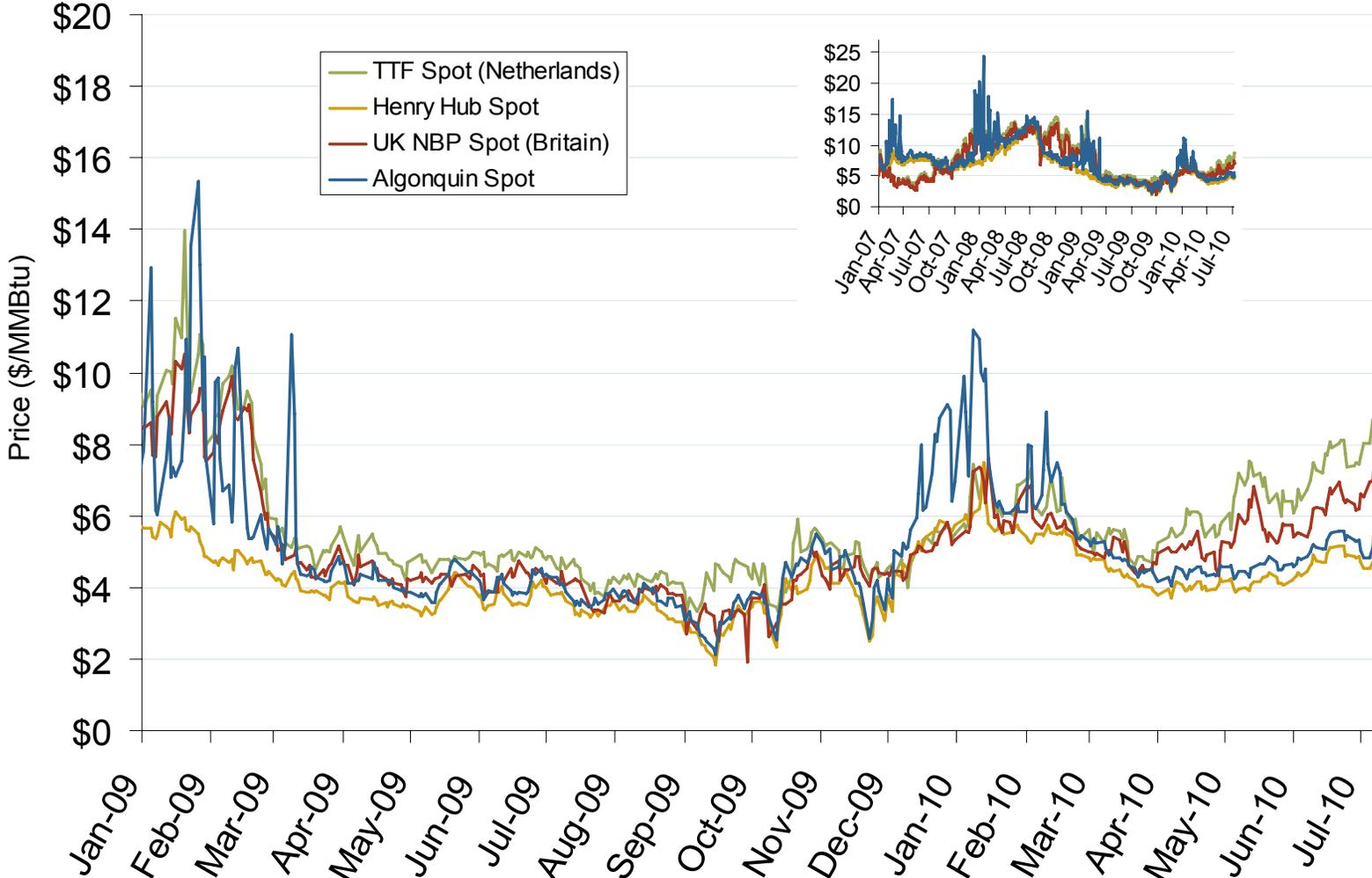
Updated July 15, 2010

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 Southeast Snapshot Report

Atlantic Basin European and US Spot Natural Gas Prices



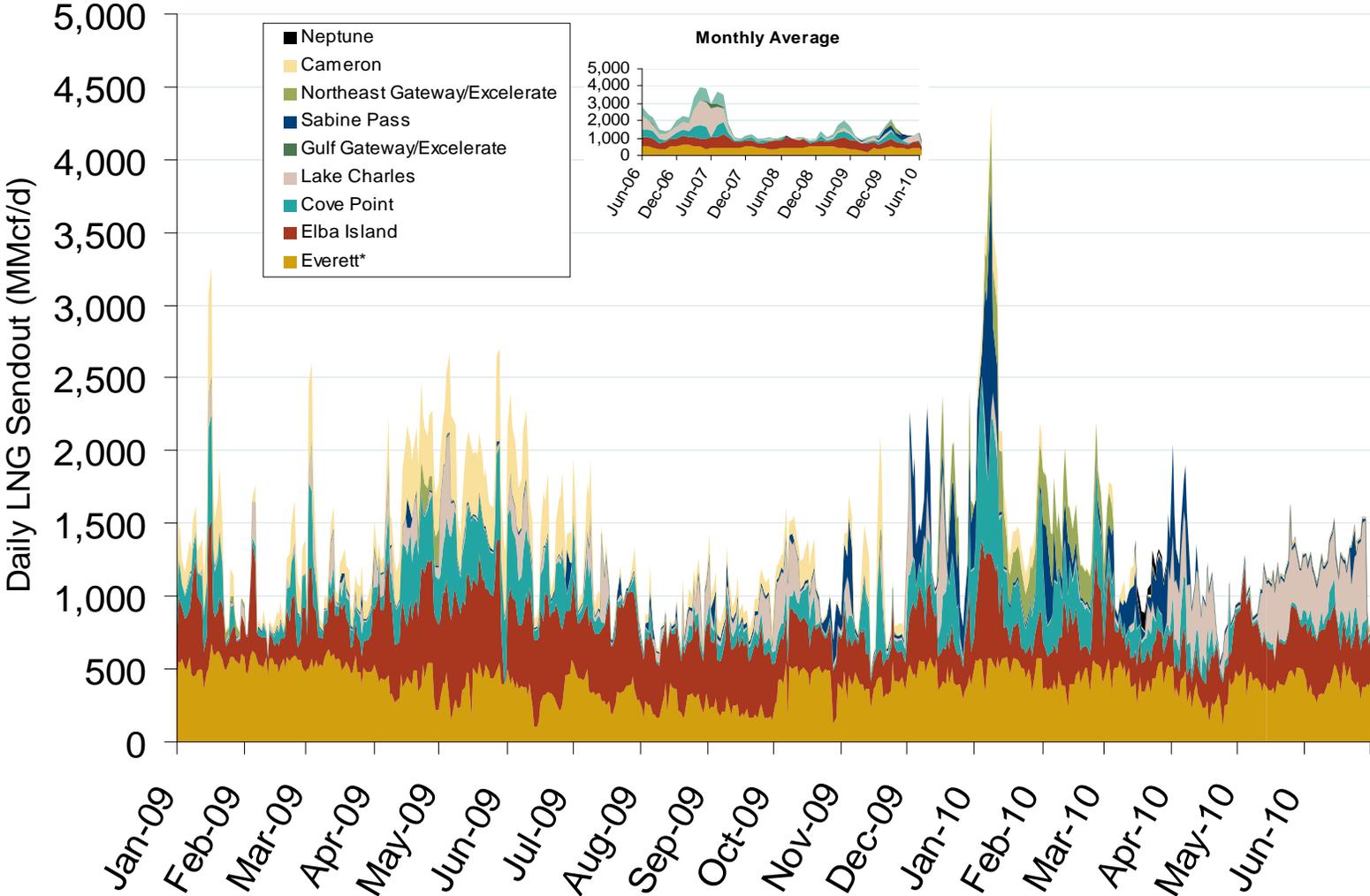
Source: Derived from *Bloomberg* and *ICE* data.
July 2010 Southeast Snapshot Report

Updated July 9, 2010

World LNG Estimated July 2010 Landed Prices



Daily Gas Sendout from Existing U.S. LNG Facilities

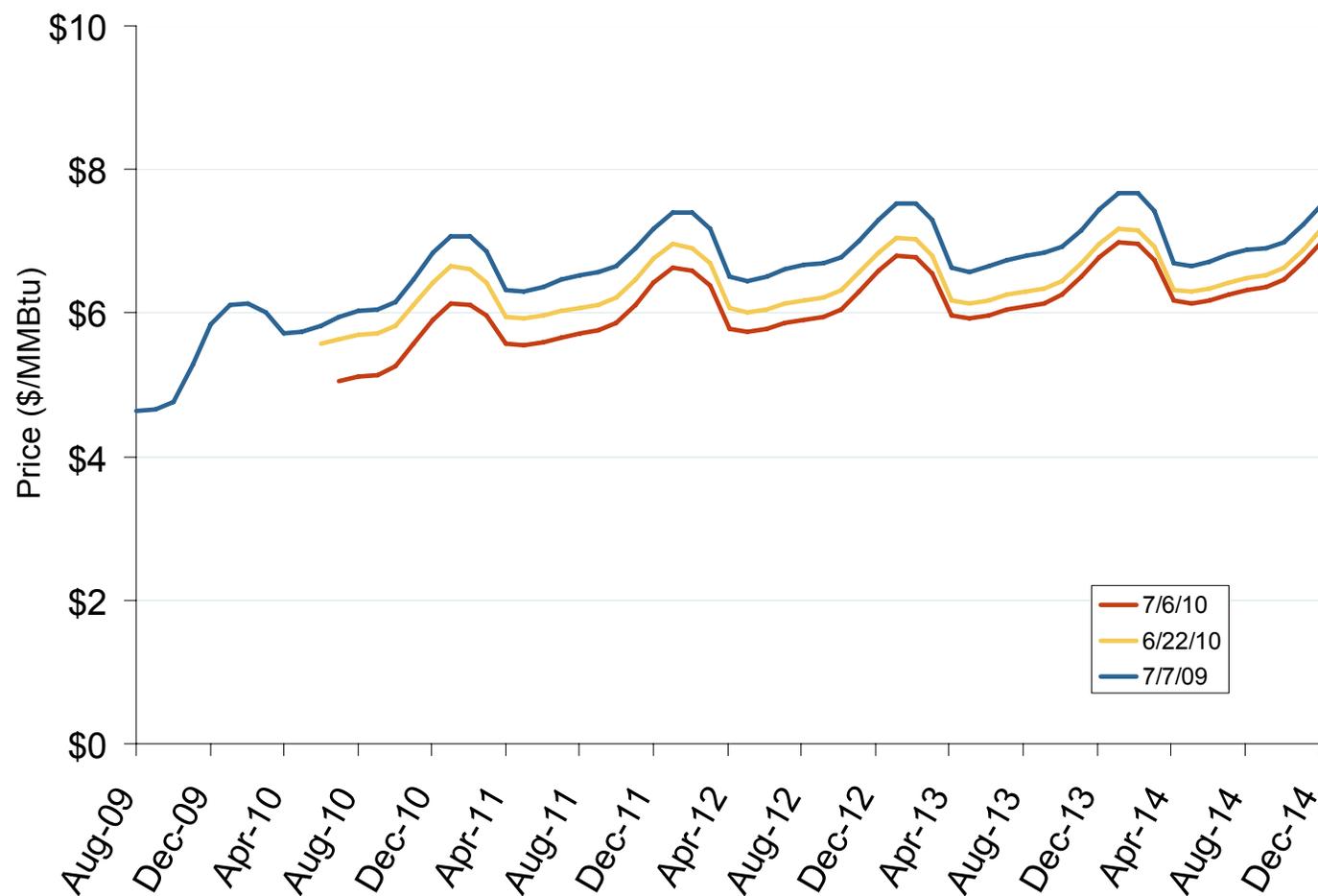


Source: Derived from *Bentek* data.

* 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.

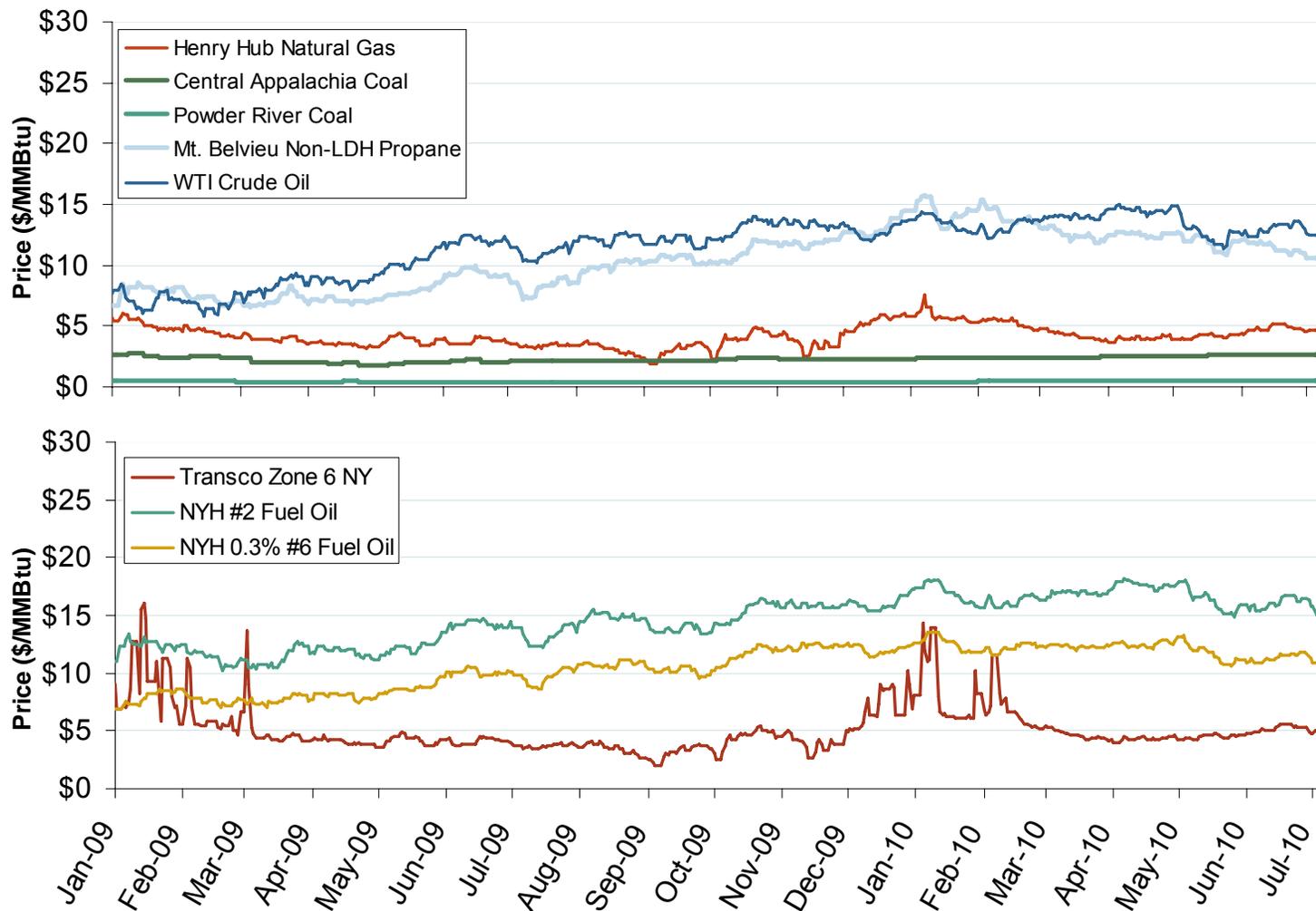
Updated July 9, 2010

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.

Oil, Coal, Natural Gas and Propane Daily Spot Prices

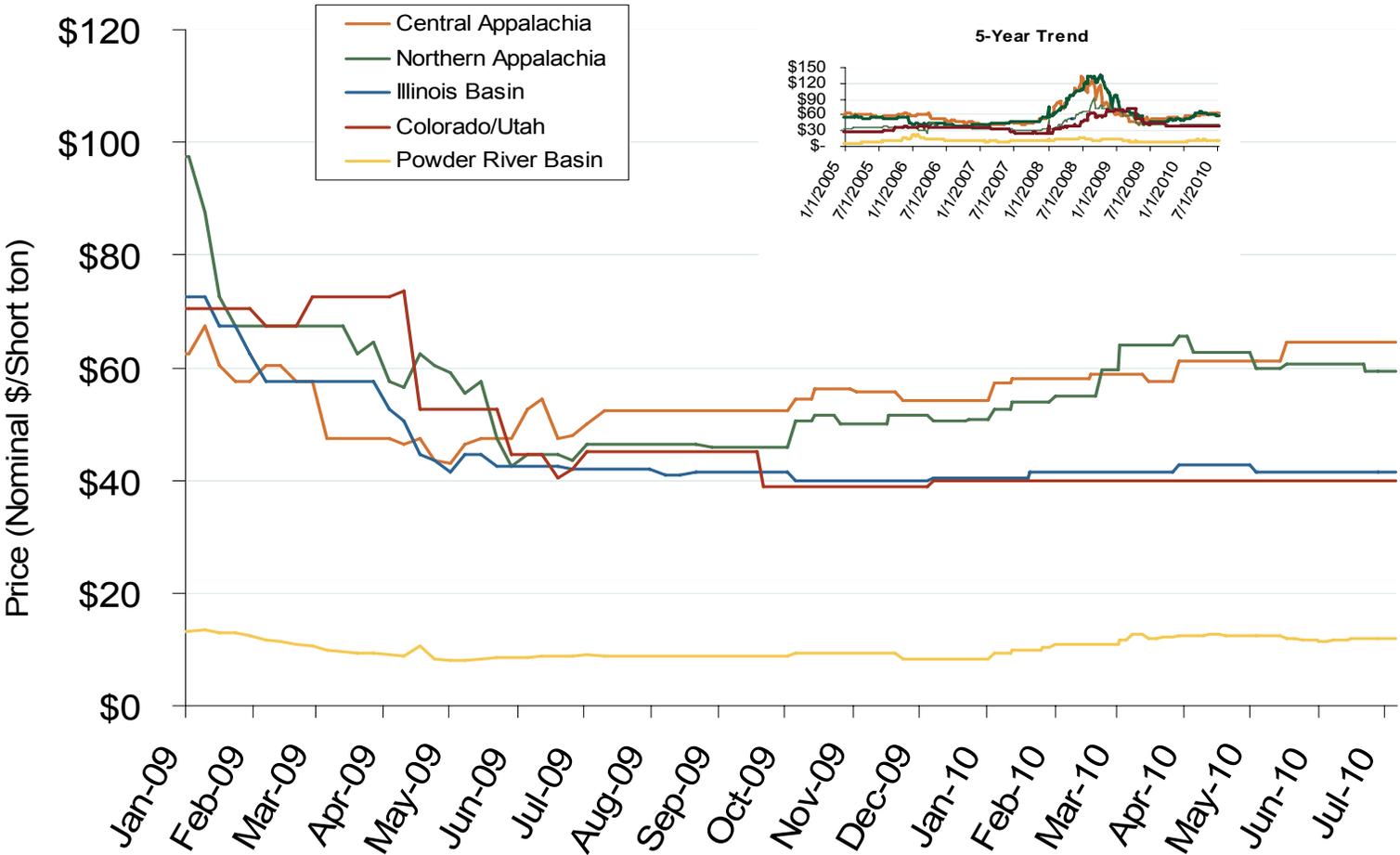


Source: Derived from *ICE* and *Bloomberg* data.

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

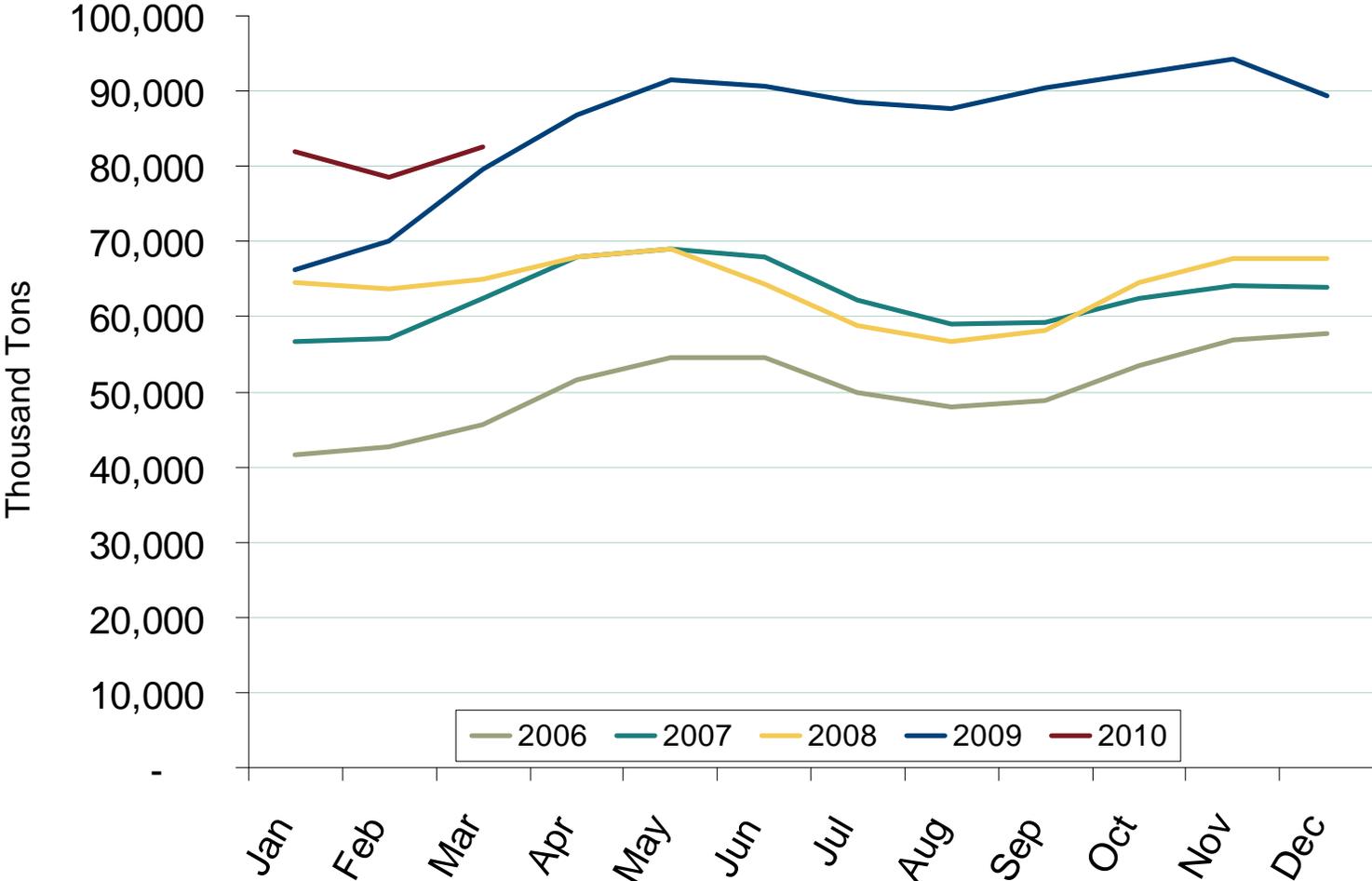


Note: the Central Appalachian (CAPP) coal is priced at Big Sandy. All others are mine mouth prices. Prices do not include transportation costs to a plant, as those can vary widely by contract specifications. Prices exclude incremental cost of emissions allowances.

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

Updated July 9, 2010

Southeast Coal Stockpiles at Electric Power Generating Facilities



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

Updated July 9, 2010