

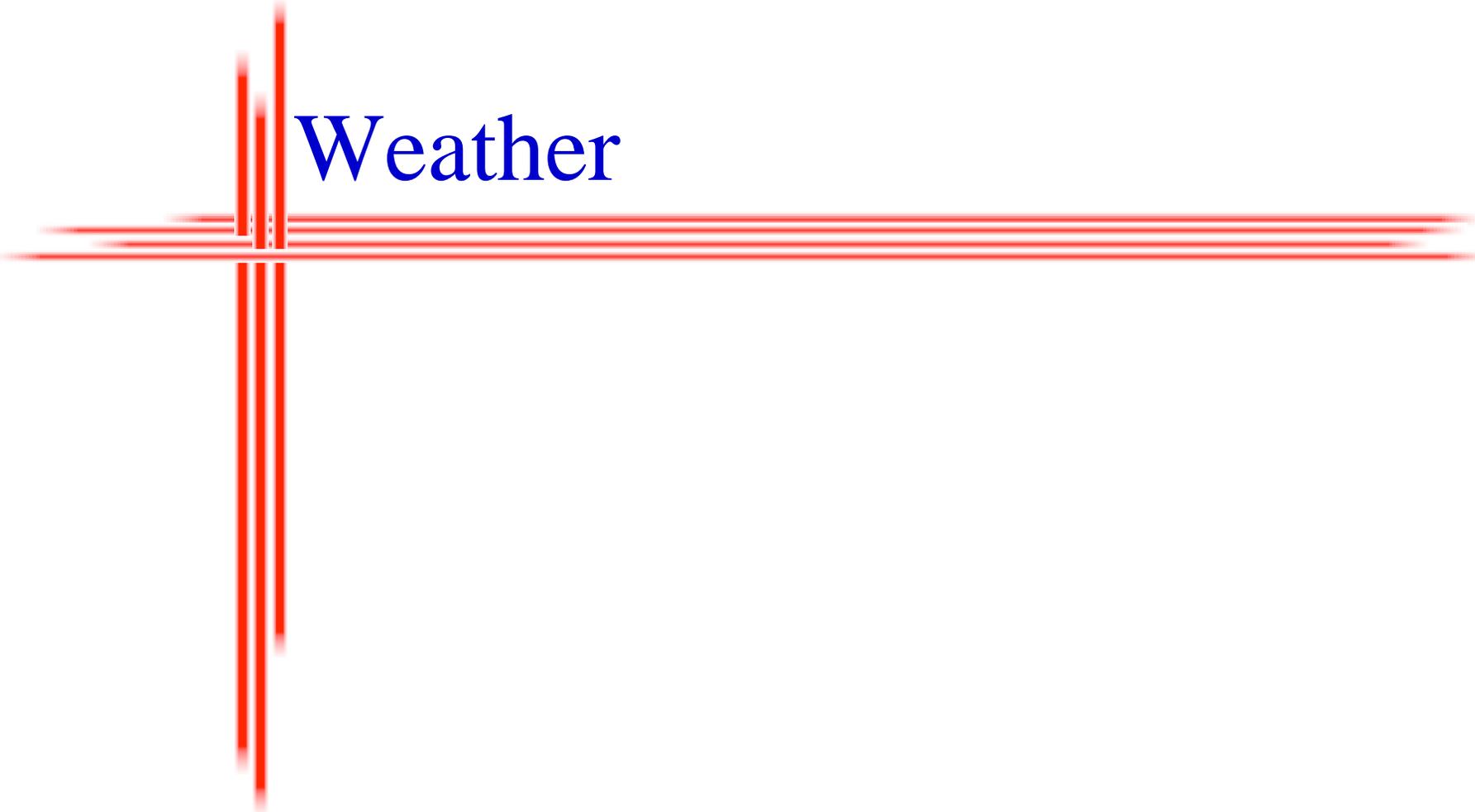
# OE ENERGY MARKET SNAPSHOT

## Southeast States Version – July 2011 Data

---

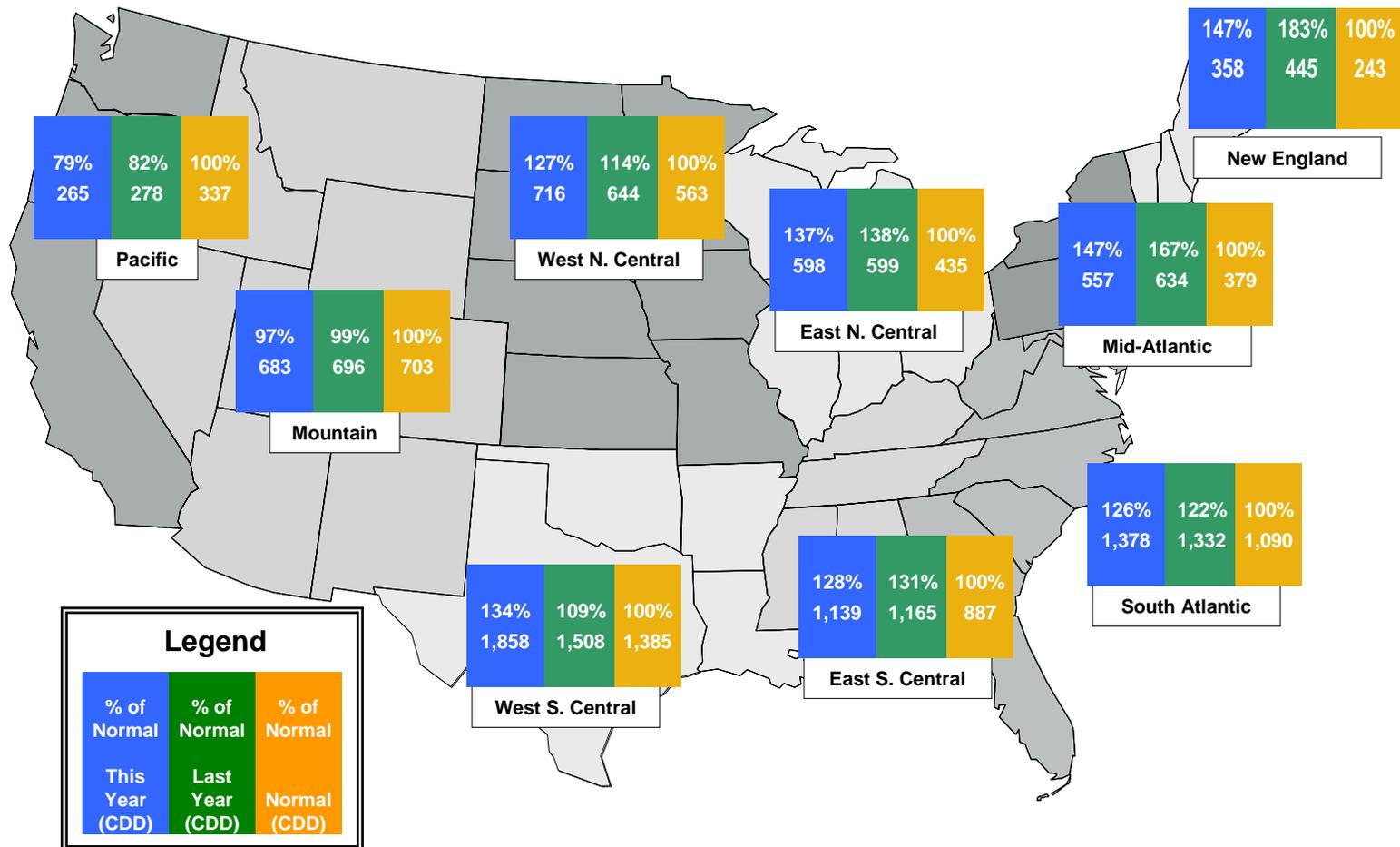
- **Weather**
- **Electricity Markets**
- **Natural Gas and Fuel Markets**

Office of Enforcement  
Federal Energy Regulatory Commission  
August 2011



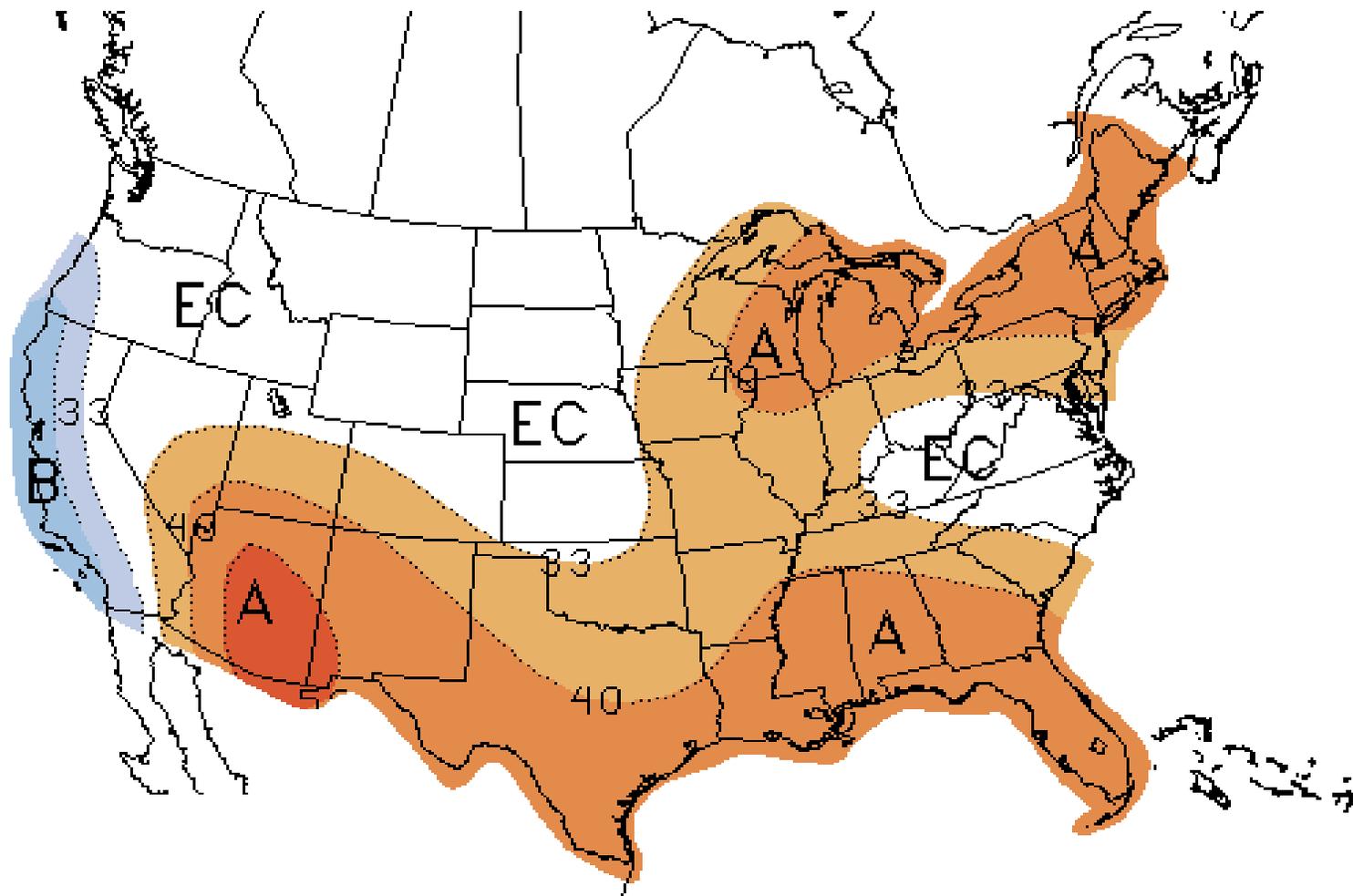
# Weather

# Regional Cooling Degree Days January through July 2011



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

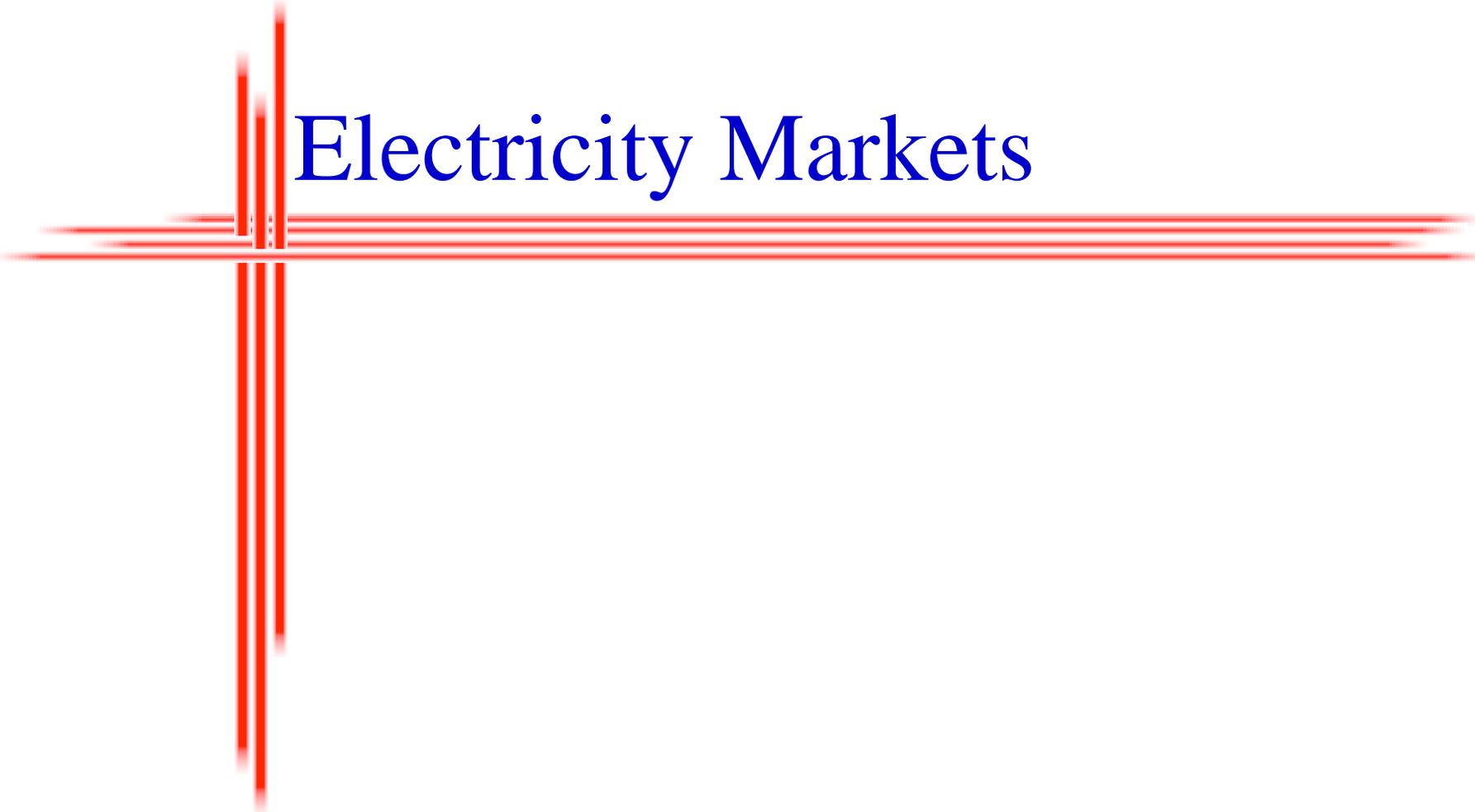
## NOAA's 3 Month Temperature Forecast Made July 21, 2011, Valid for August – Oct 2011



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.

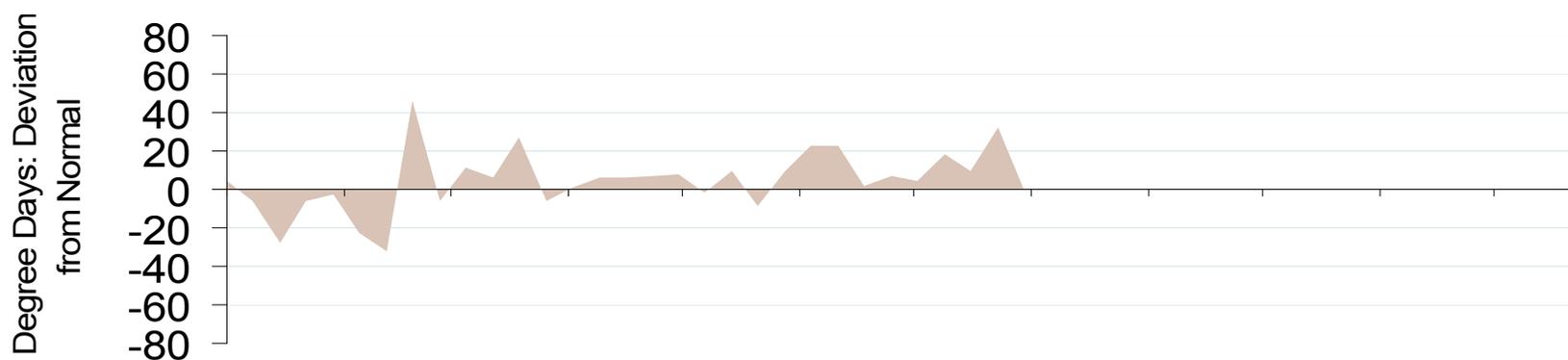
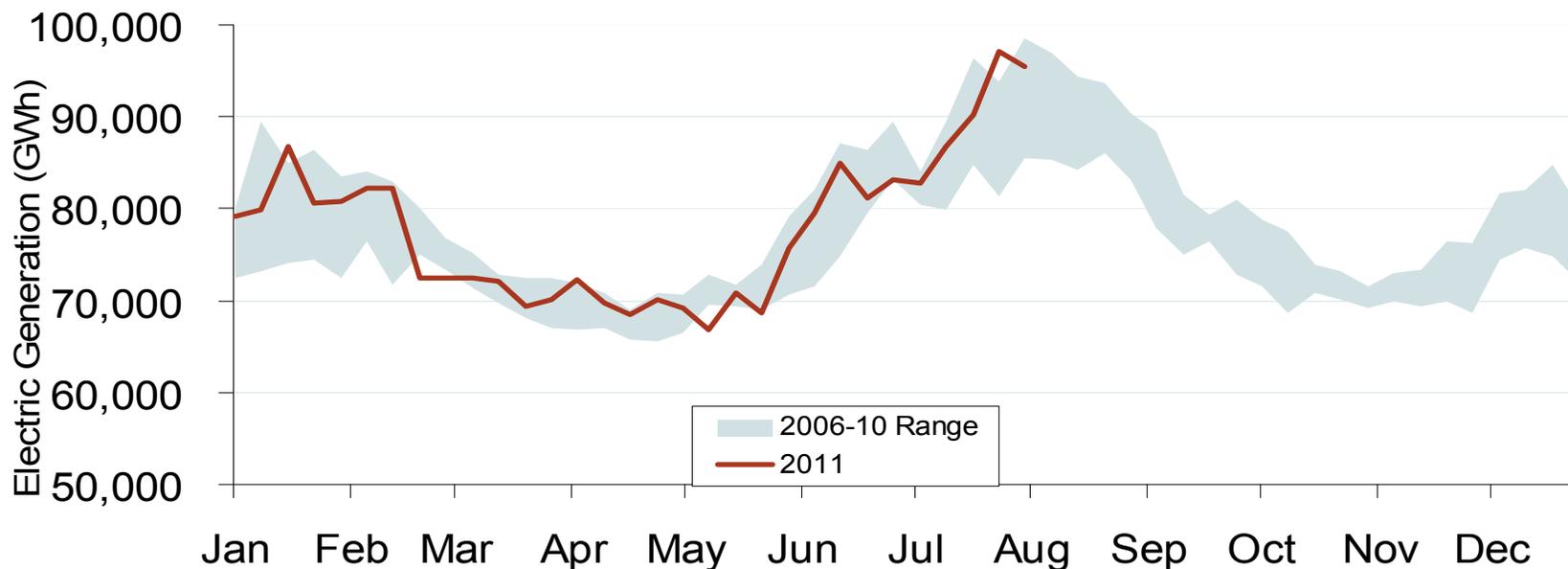
Updated August 5, 2011

3012

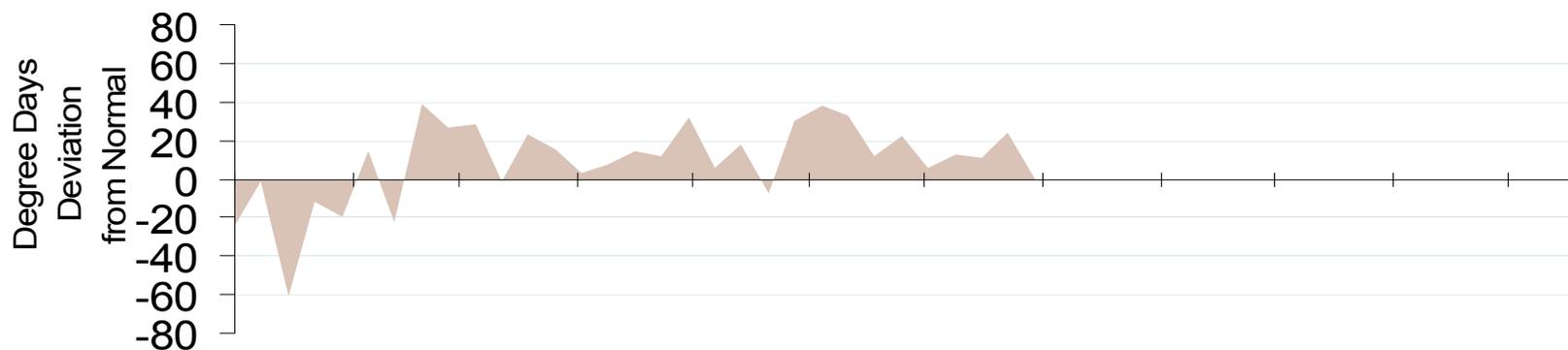
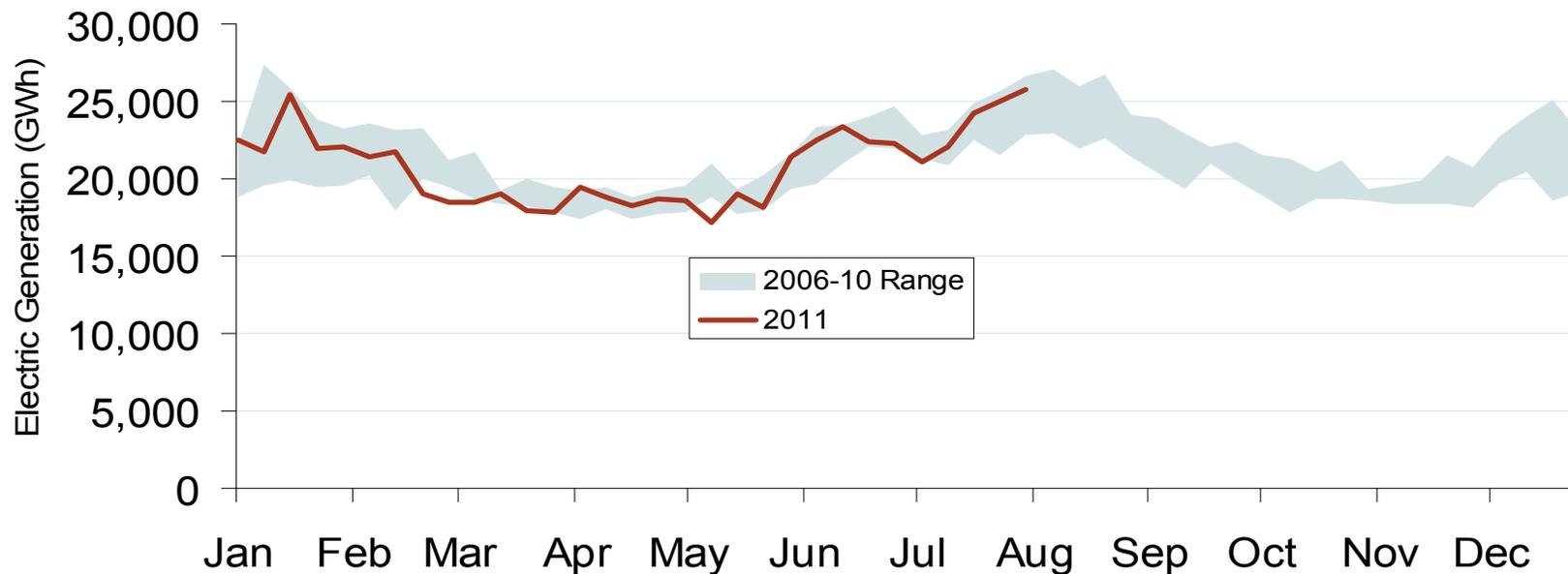


# Electricity Markets

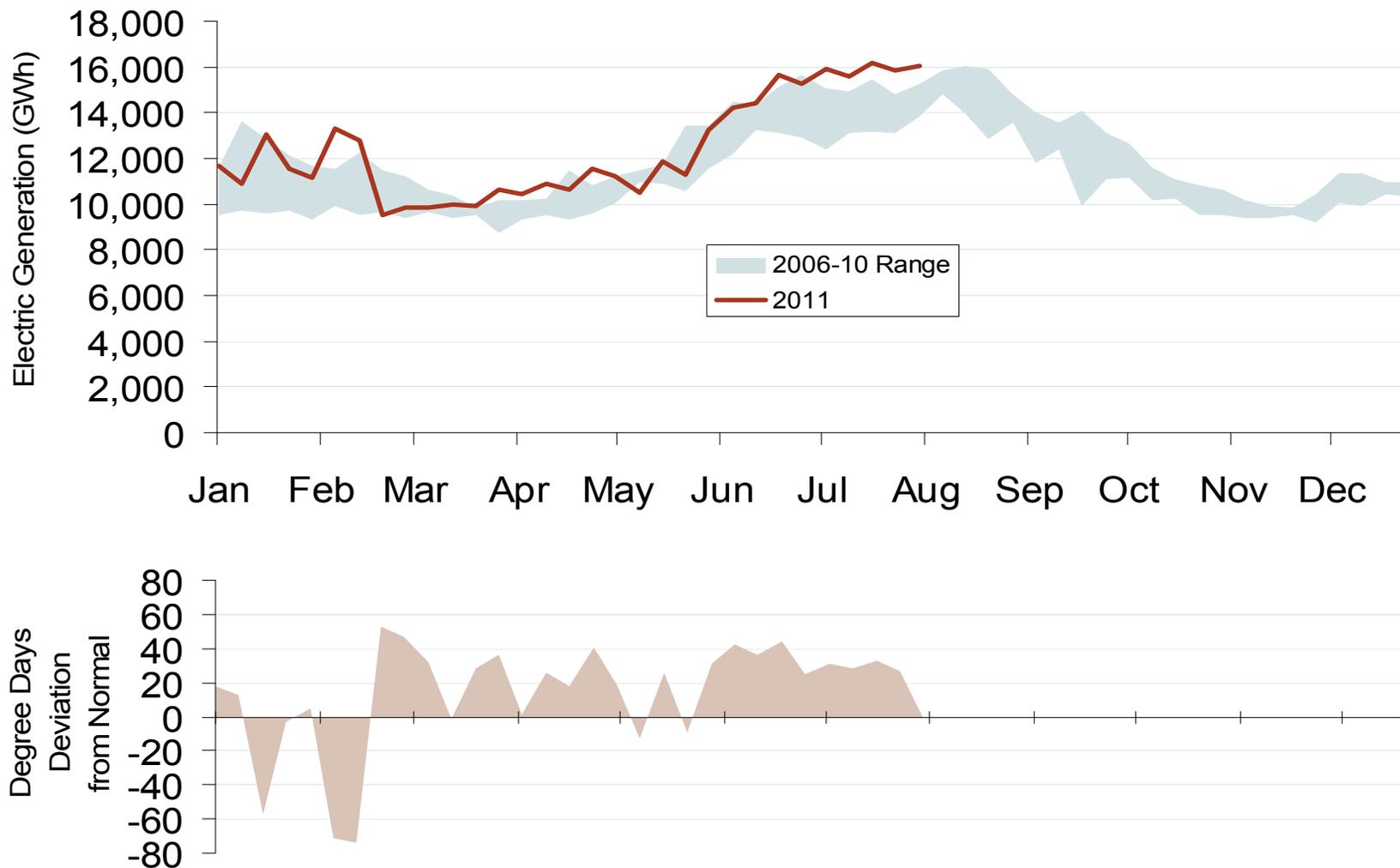
## Weekly U.S. Electric Generation Output and Temperatures



## Weekly Power Generation & Temps. - Southeast



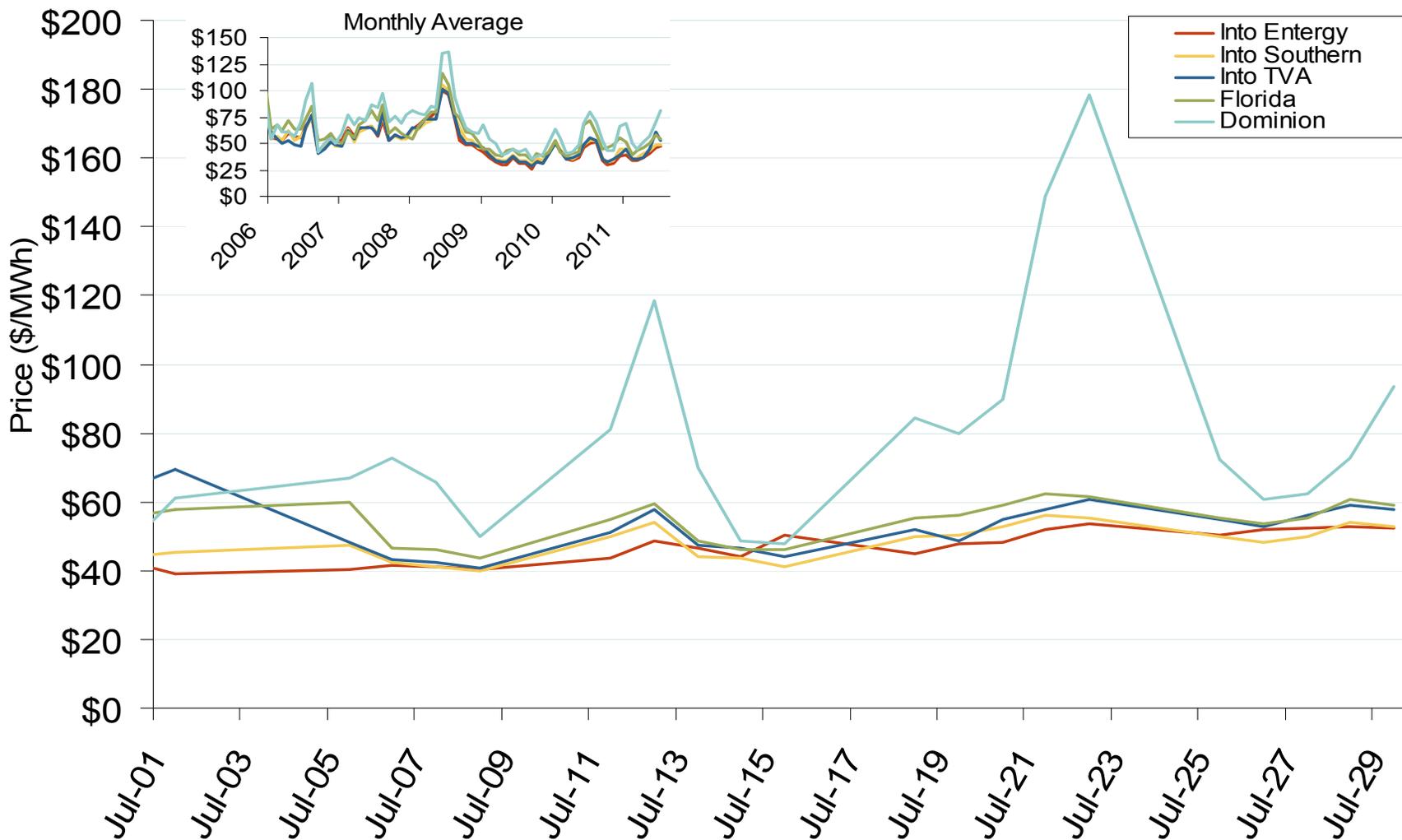
## Weekly Power Generation & Temps. - South Central



Southeast Electric Market: Last Month's Southeastern Bilateral Prices

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

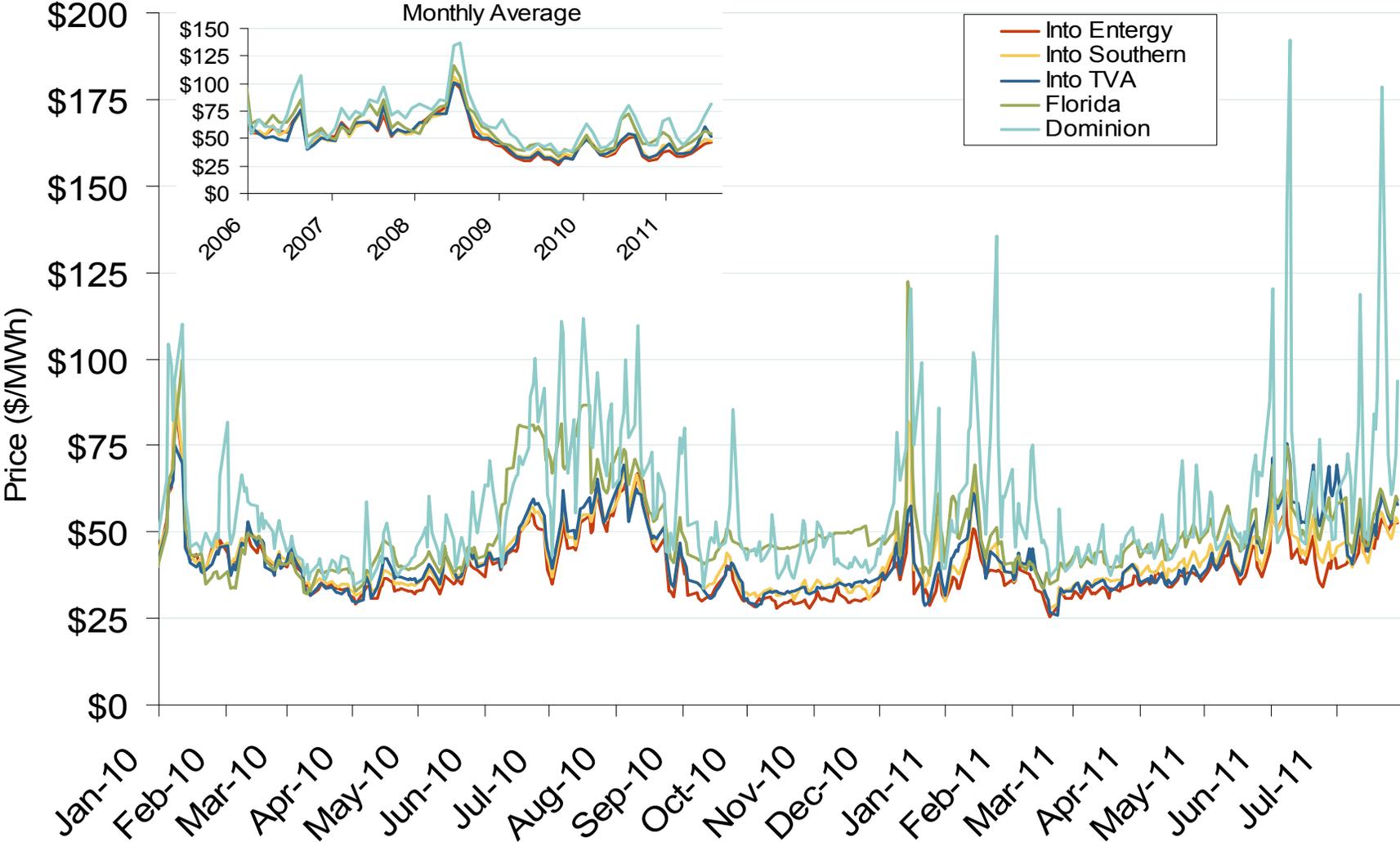
## Southeastern Daily Bilateral Day-Ahead On-Peak Prices



Southeast Electric Market: Southeastern Bilateral Prices

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

# Southeastern Daily Bilateral Day-Ahead On-Peak Prices



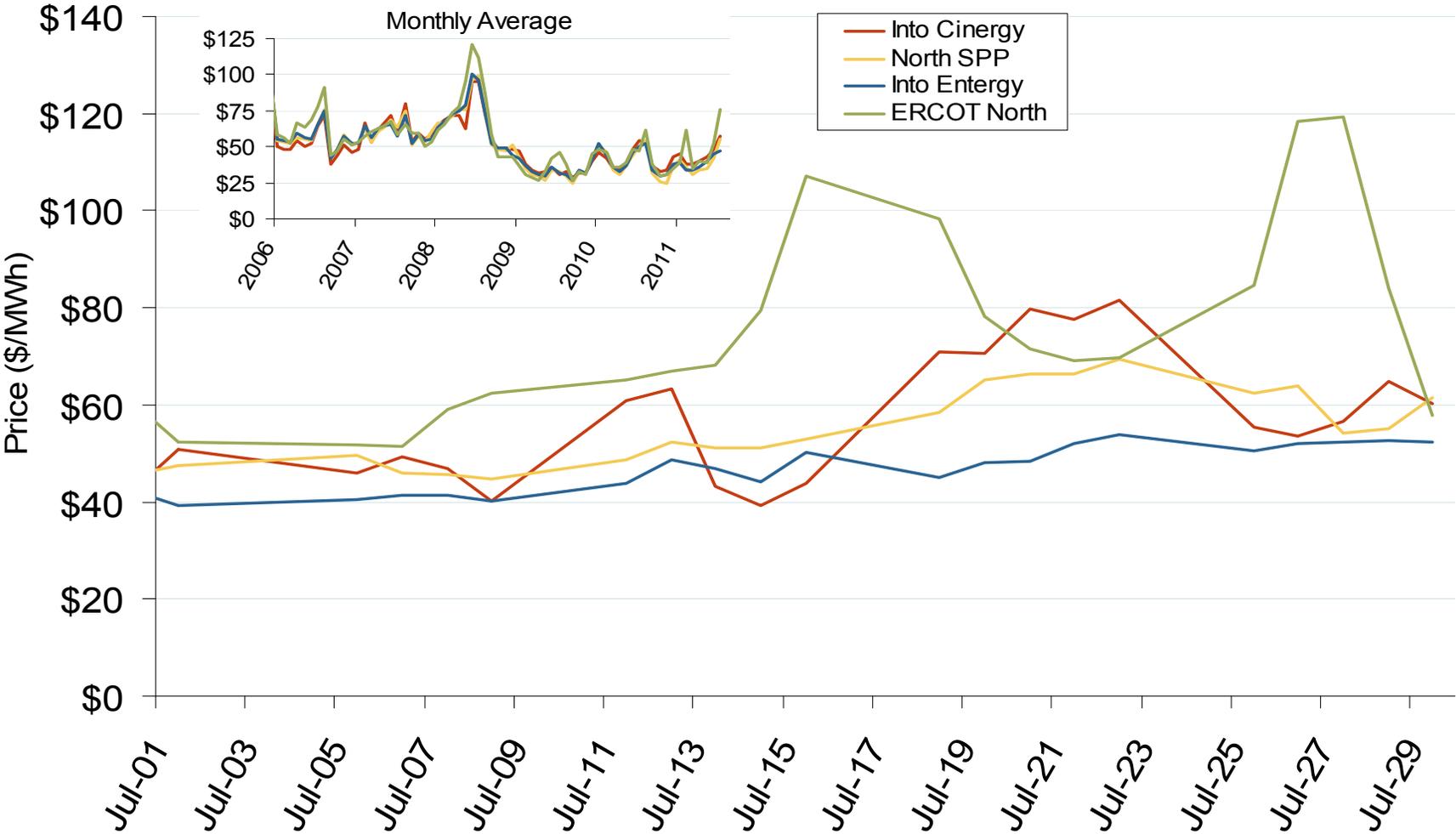
Source: Derived from *Platts* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

Southeast Electric Market: Last Month's Midwestern Bilateral Prices

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

# Midwestern Daily Bilateral Day-Ahead On-Peak Prices



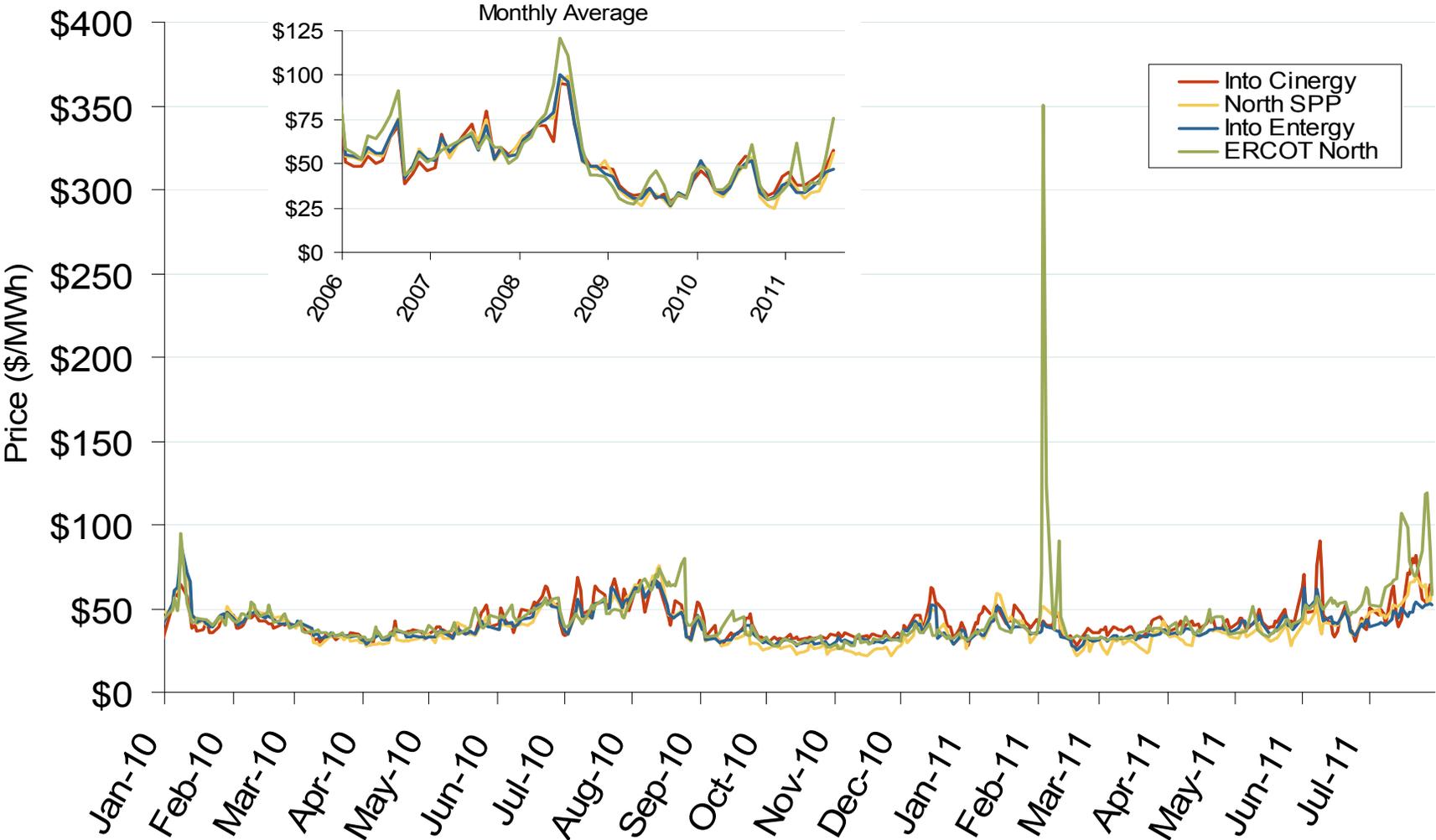
Source: Derived from Platts data  
August 2011 Southeast Snapshot Report

Updated: August 03, 2011

Southeast Electric Market: Midwestern Bilateral Prices

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

# Midwestern Daily Bilateral Day-Ahead On-Peak Prices



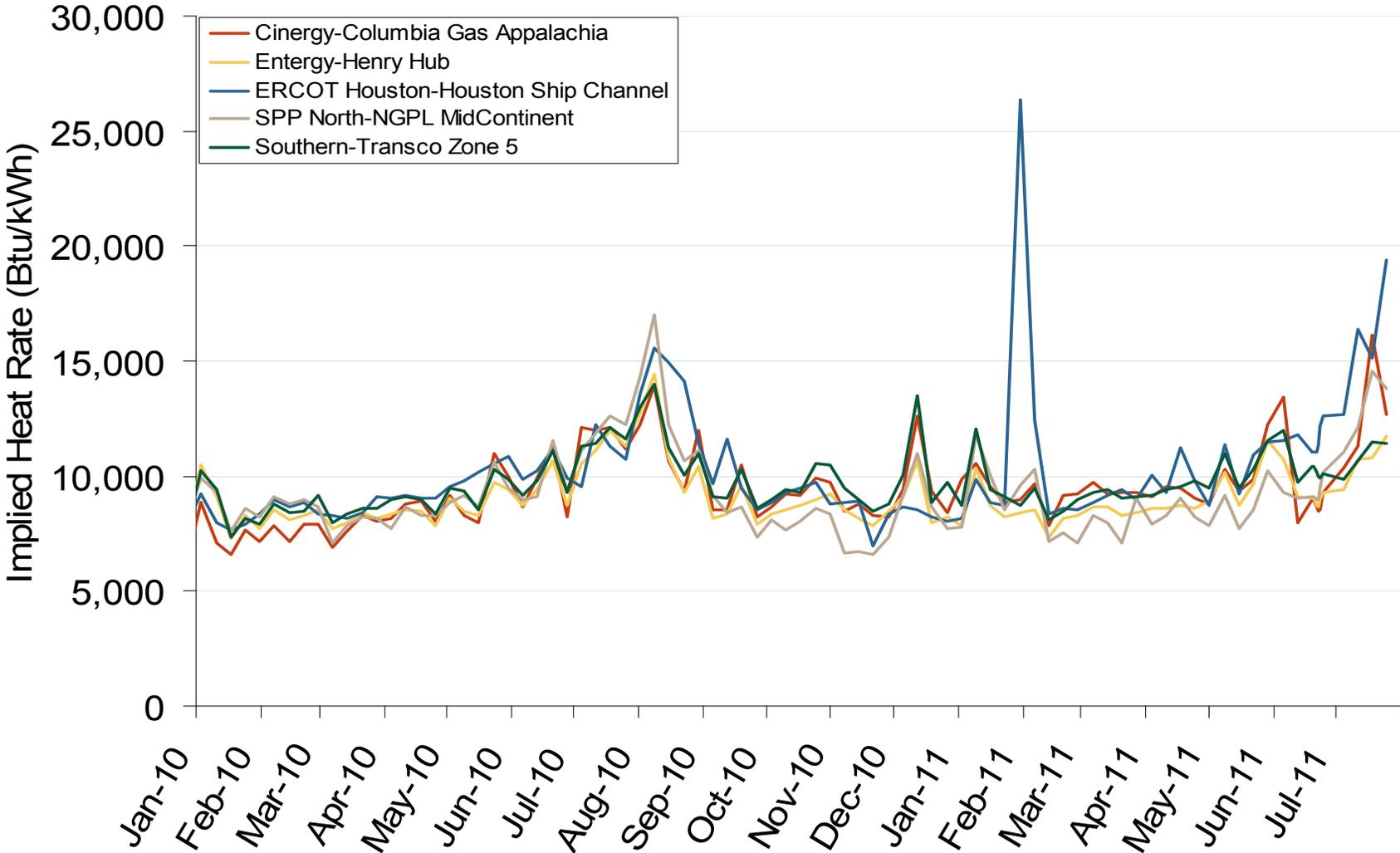
Source: Derived from *Platts* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

Southeast Electric Market: South Central Implied Heat Rates

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

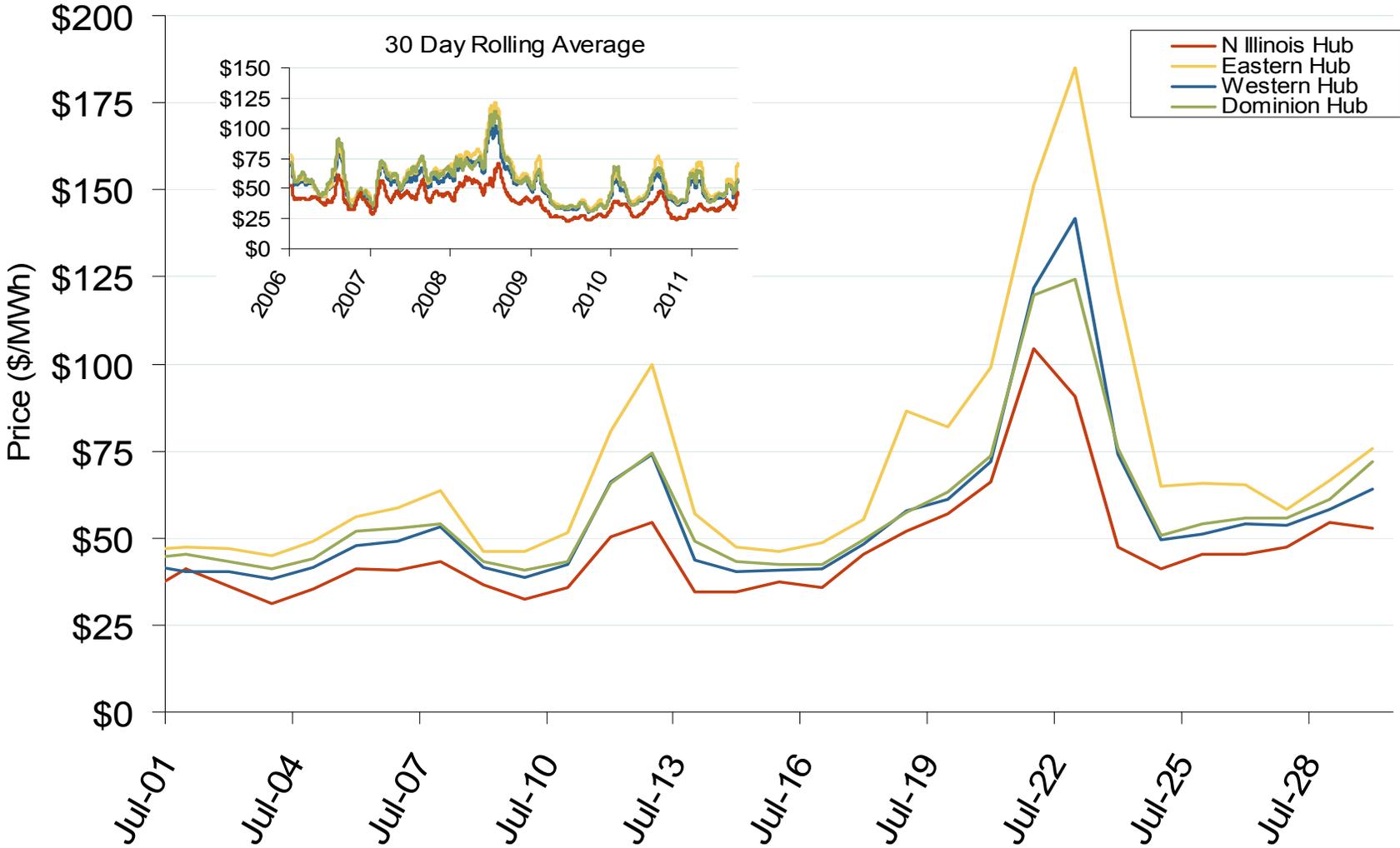
### Implied Heat Rates at South Central Trading Points - Weekly Avgs.



Source: Derived from Platts on-peak electric and natural gas price data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

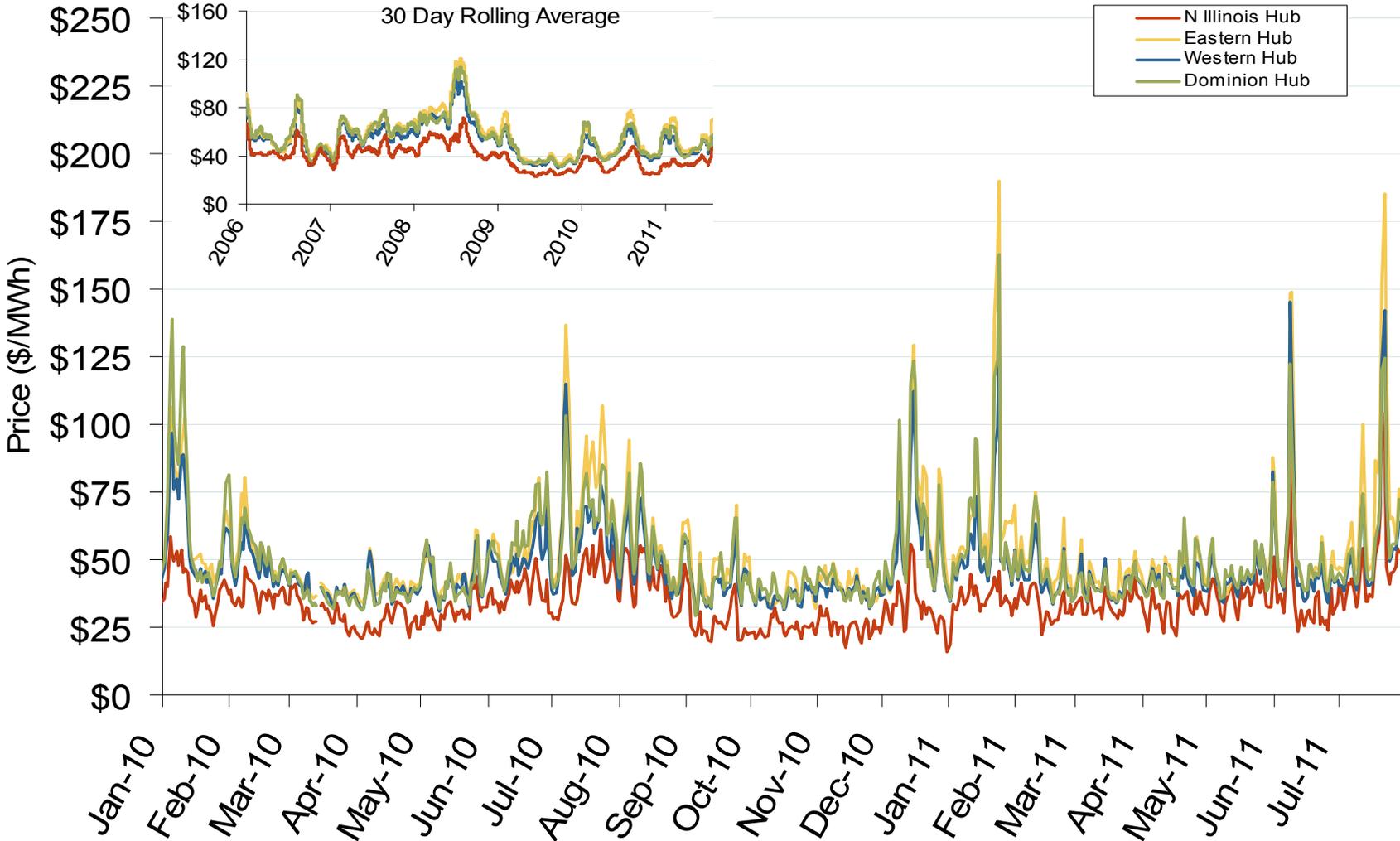
### Daily Average of PJM Day-Ahead Prices - All Hours



Source: Derived from Bloomberg data  
August 2011 Southeast Snapshot Report

Updated: August 09, 2011

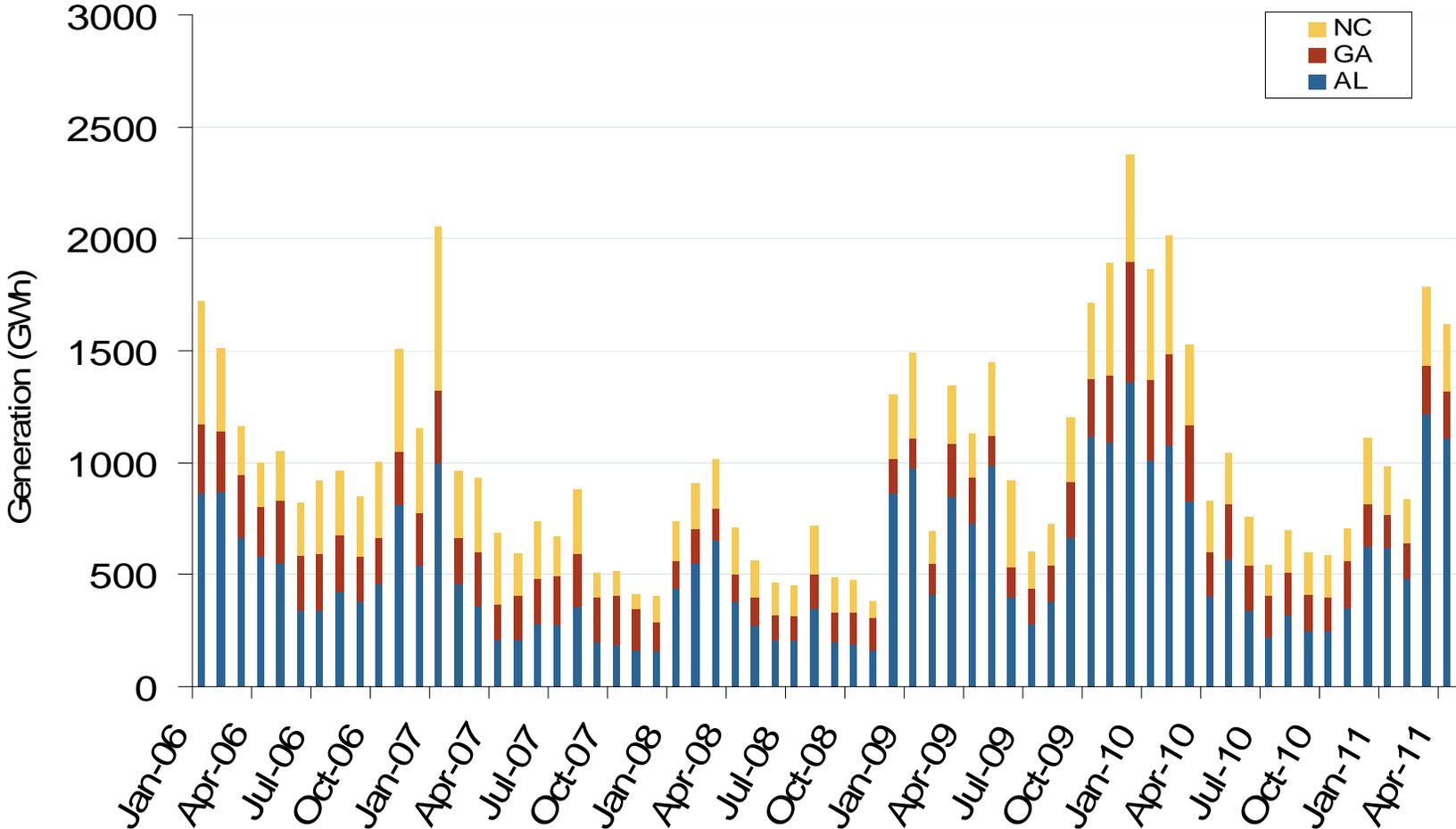
### Daily Average of PJM Day-Ahead Prices - All Hours



Source: Derived from *Bloomberg* data  
August 2011 Southeast Snapshot Report

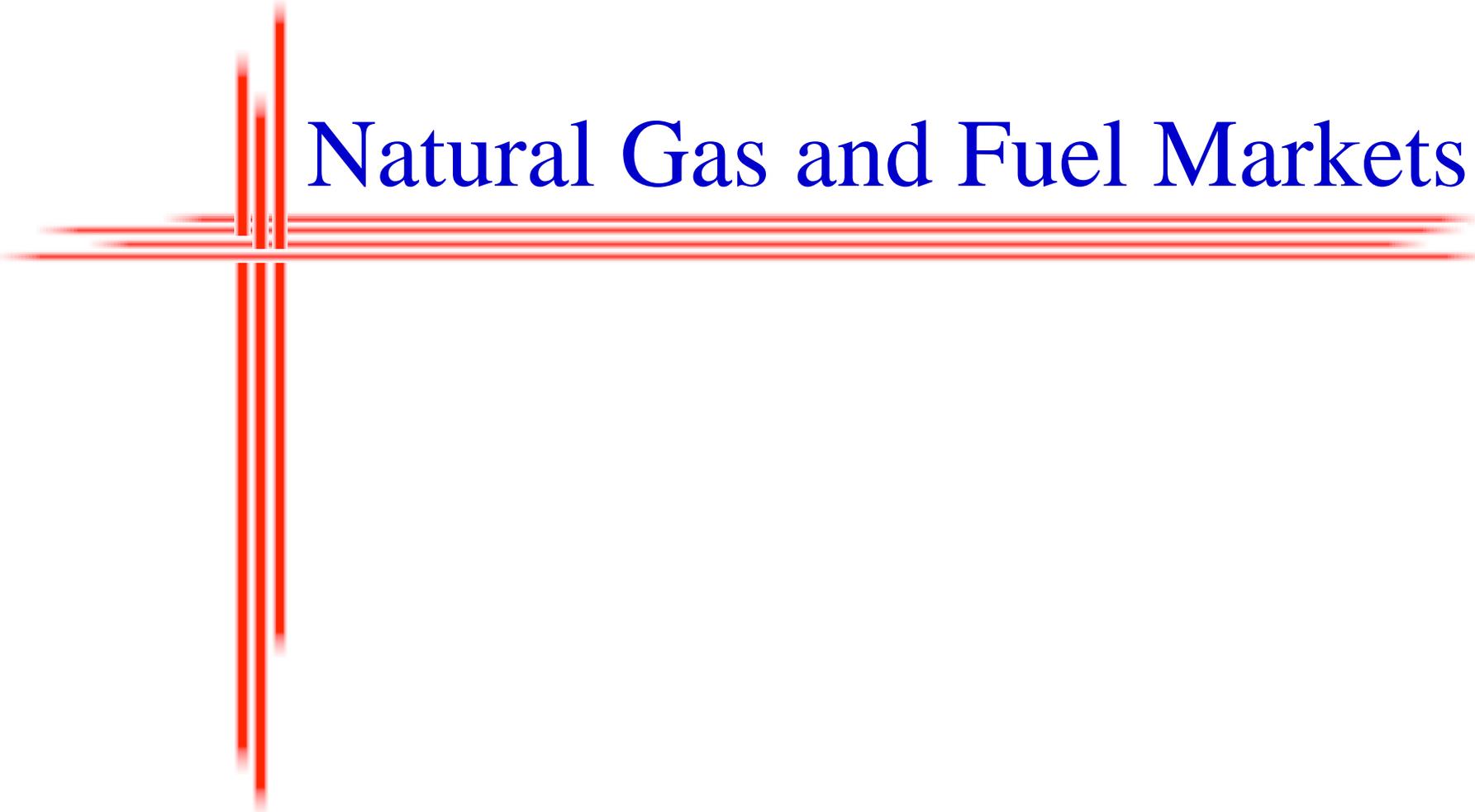
Updated: August 04, 2011

# Monthly Southeastern Hydroelectric Generation



Source: Ventyx, derived from EIA and EPA data.

Updated: August 05, 2011

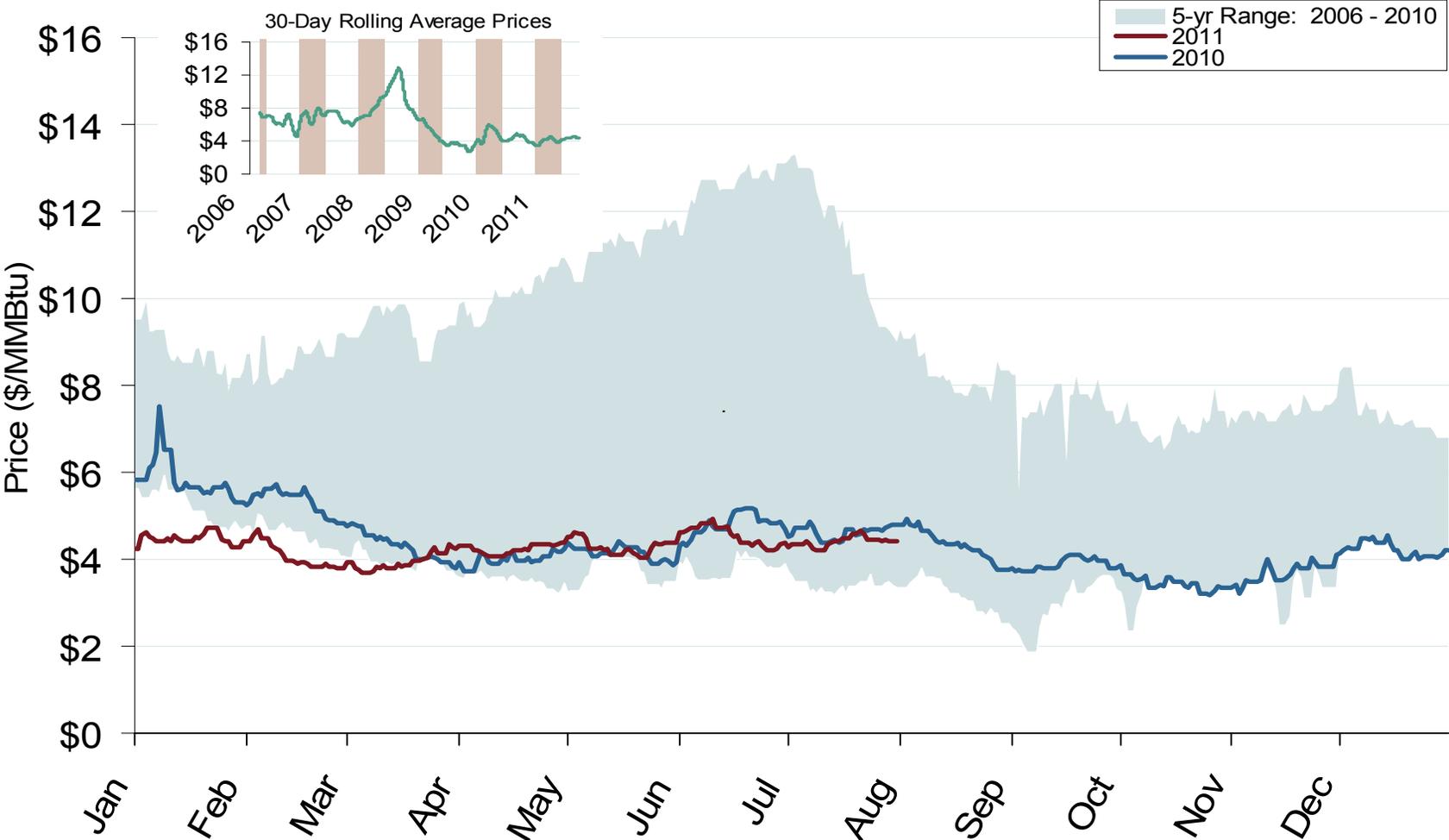


# Natural Gas and Fuel Markets

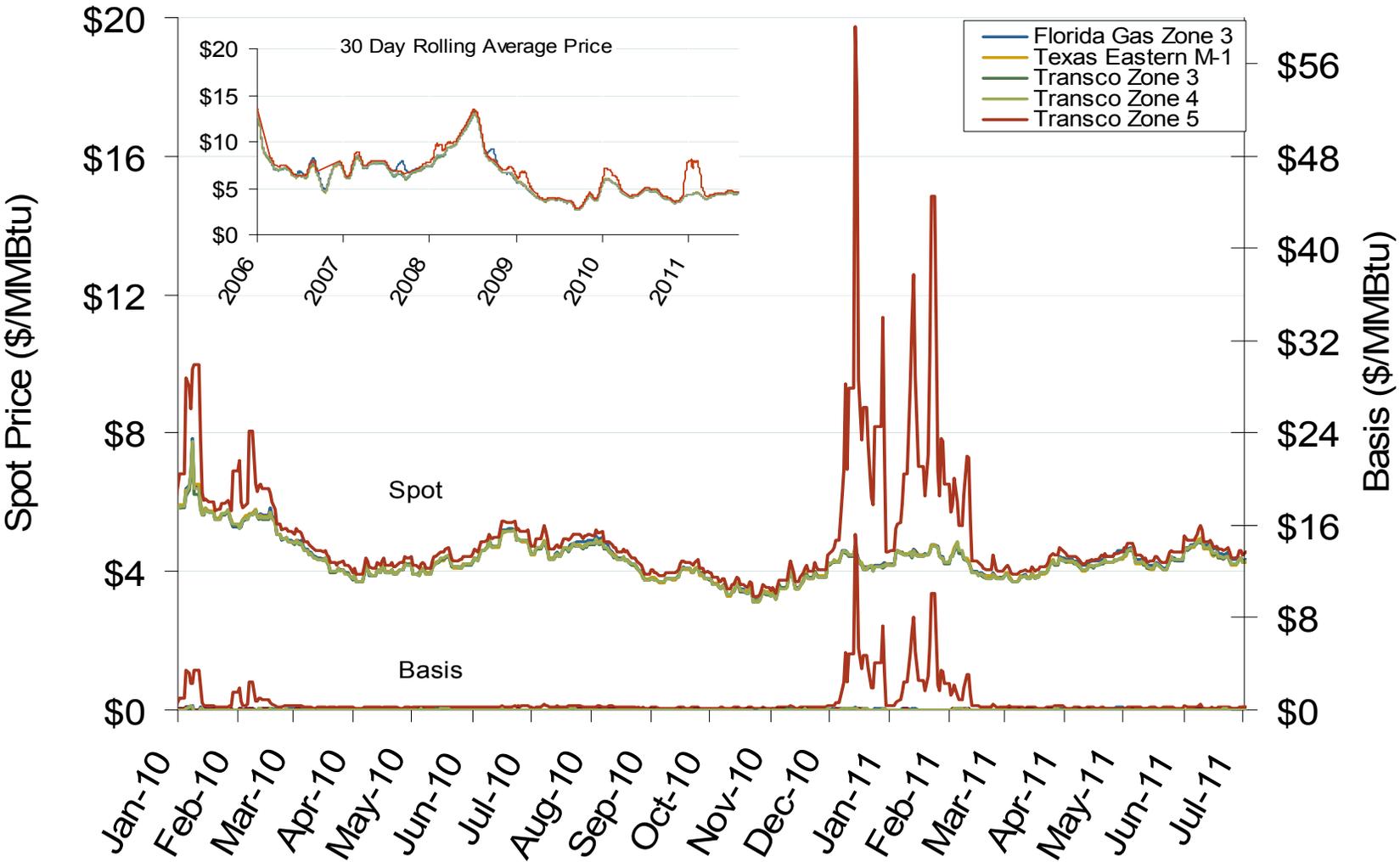
Natural Gas Market Overview: 5 Year Range of Henry Hub Spot Prices

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

### Henry Hub Natural Gas Daily Spot Prices

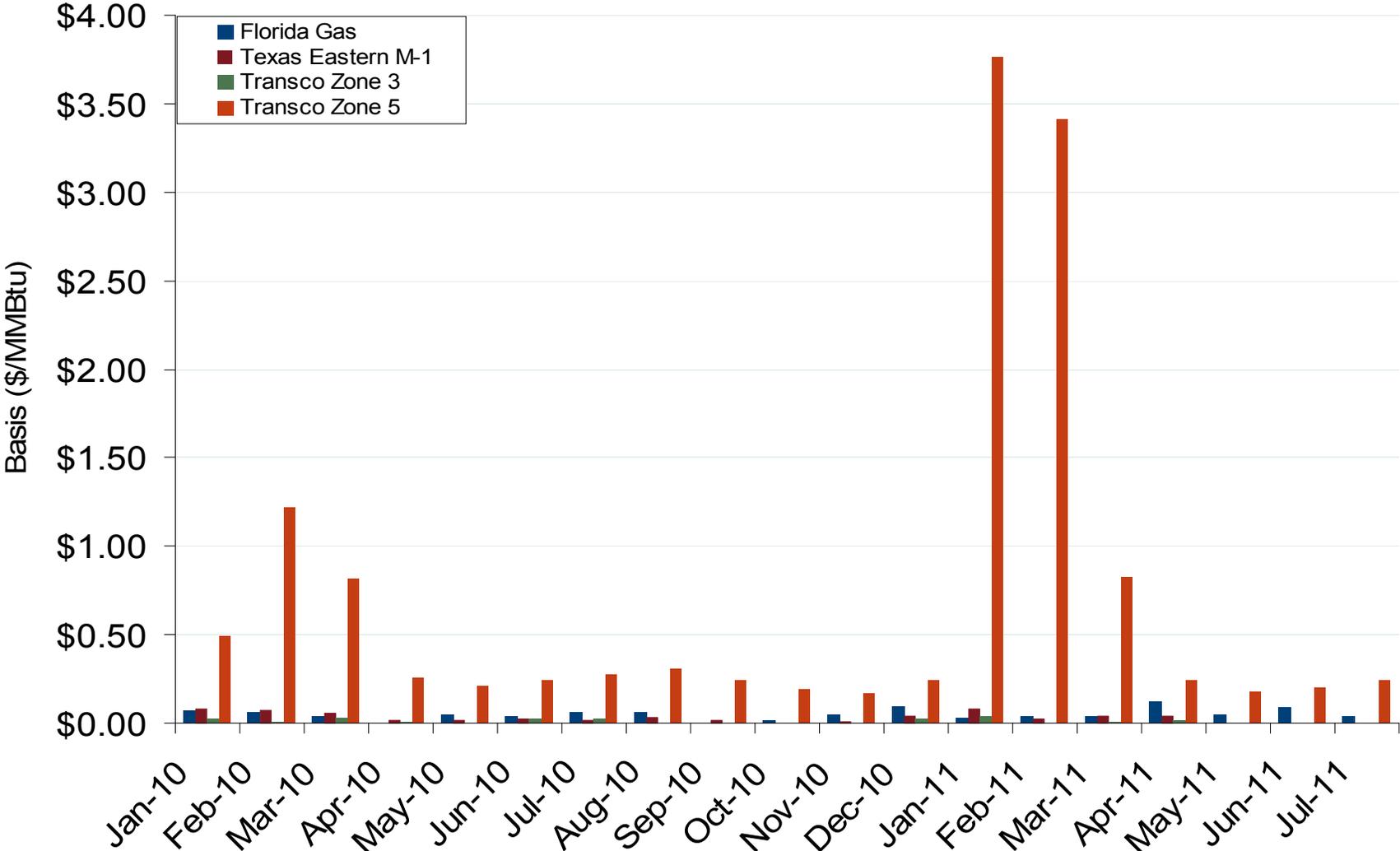


### Southeastern Day-Ahead Hub Spot Prices and Basis



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

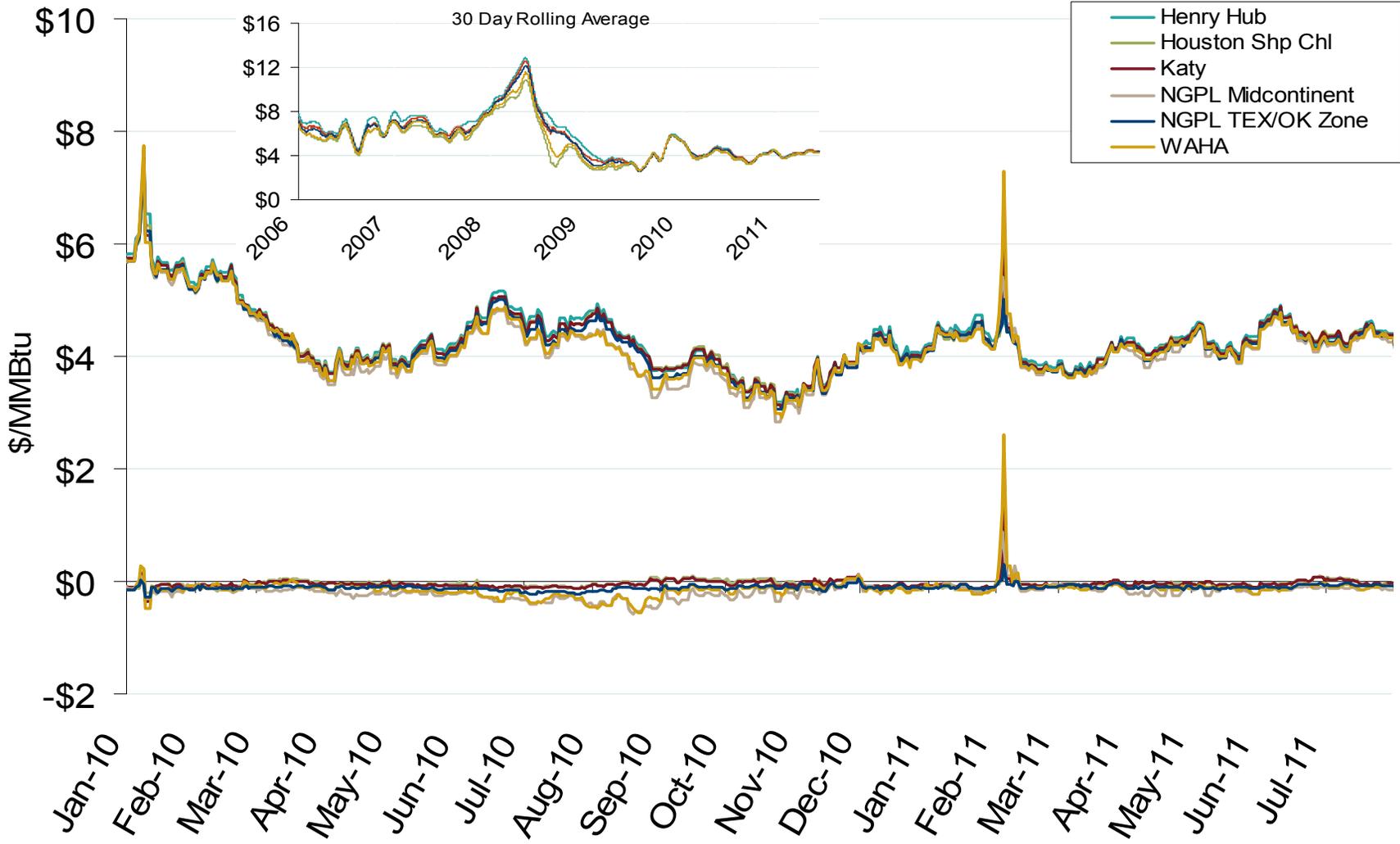
### Southeastern Monthly Average Basis Value to Henry Hub



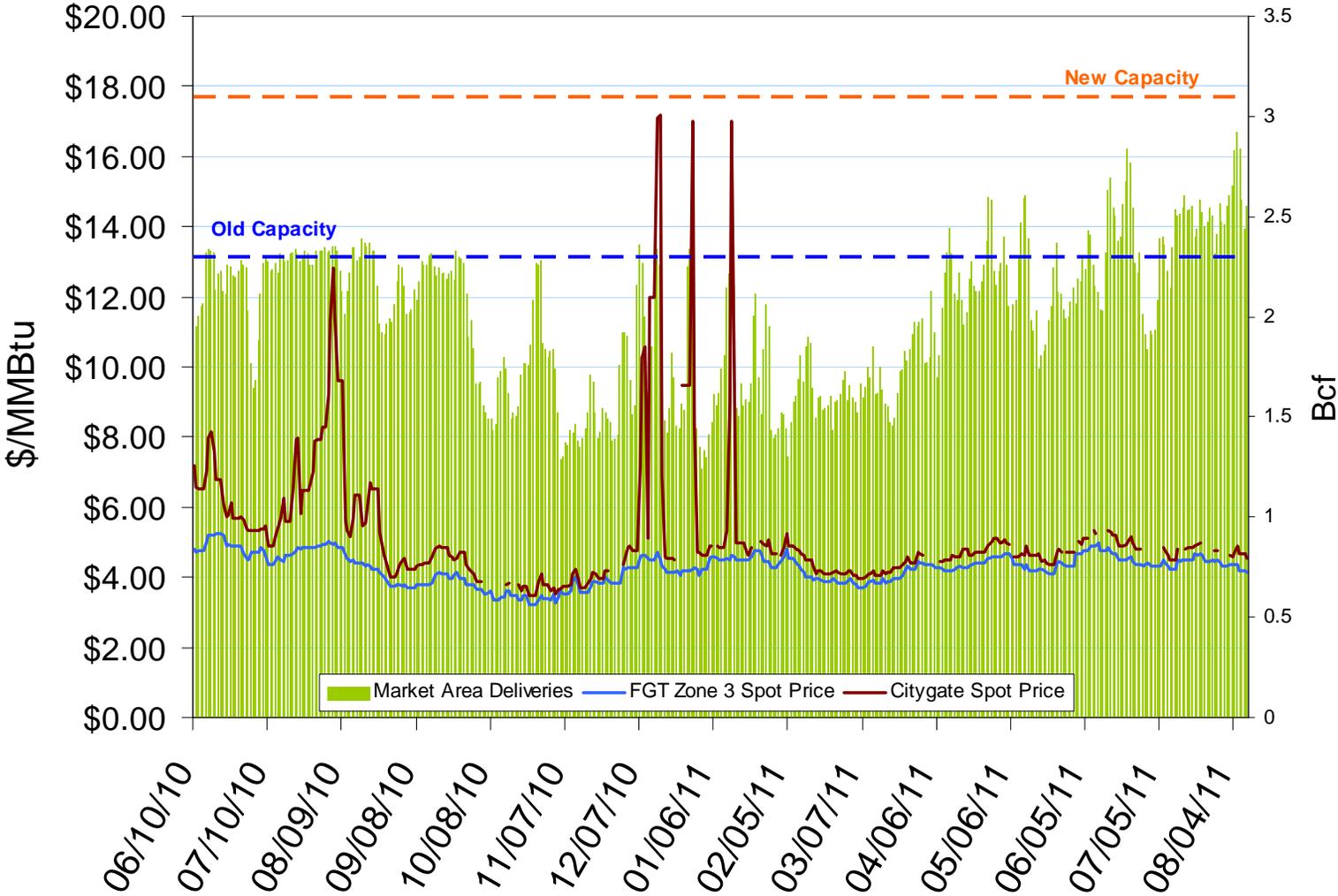
Source: Derived from Platts data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

### Gulf Day-Ahead Hub Spot Prices and Basis

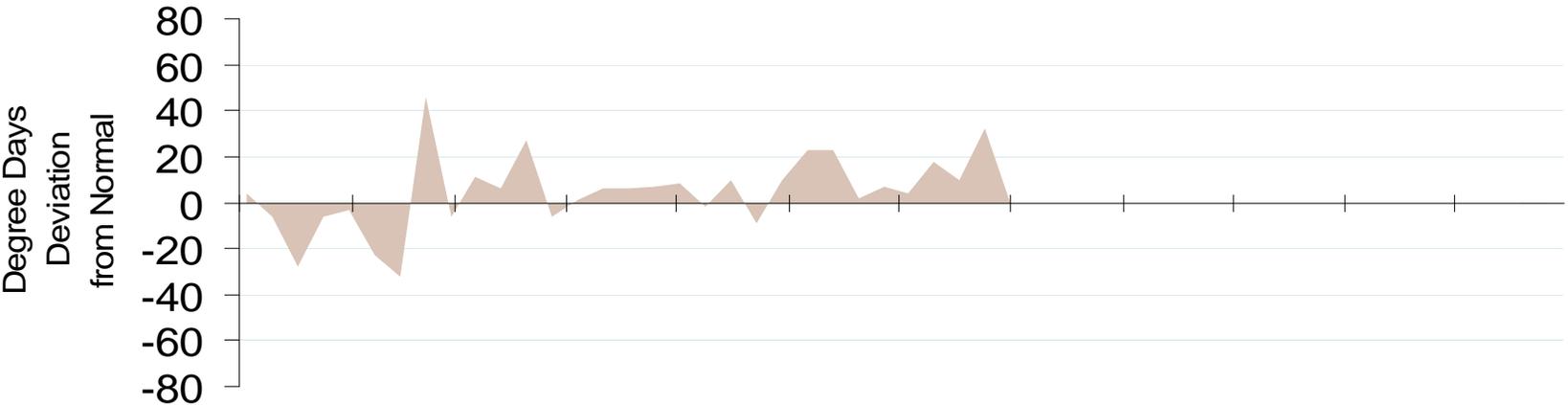
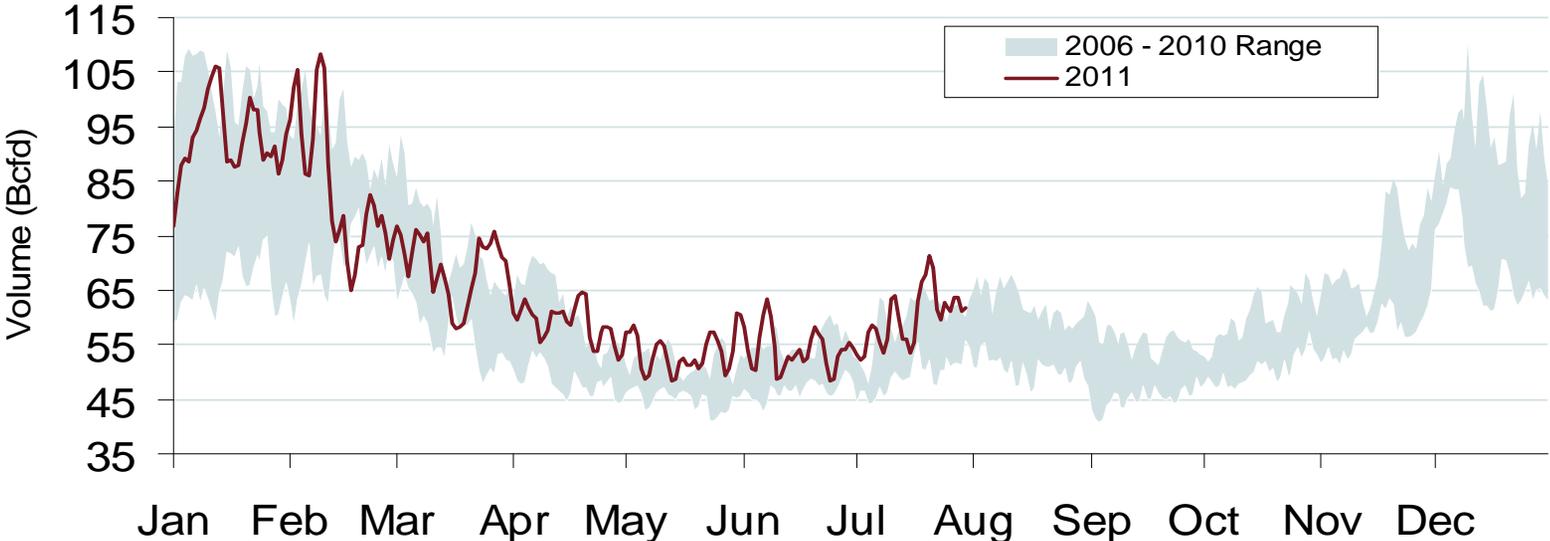


# FGT Expansion Moderates Regional Prices



Source: Platts and Bentek data

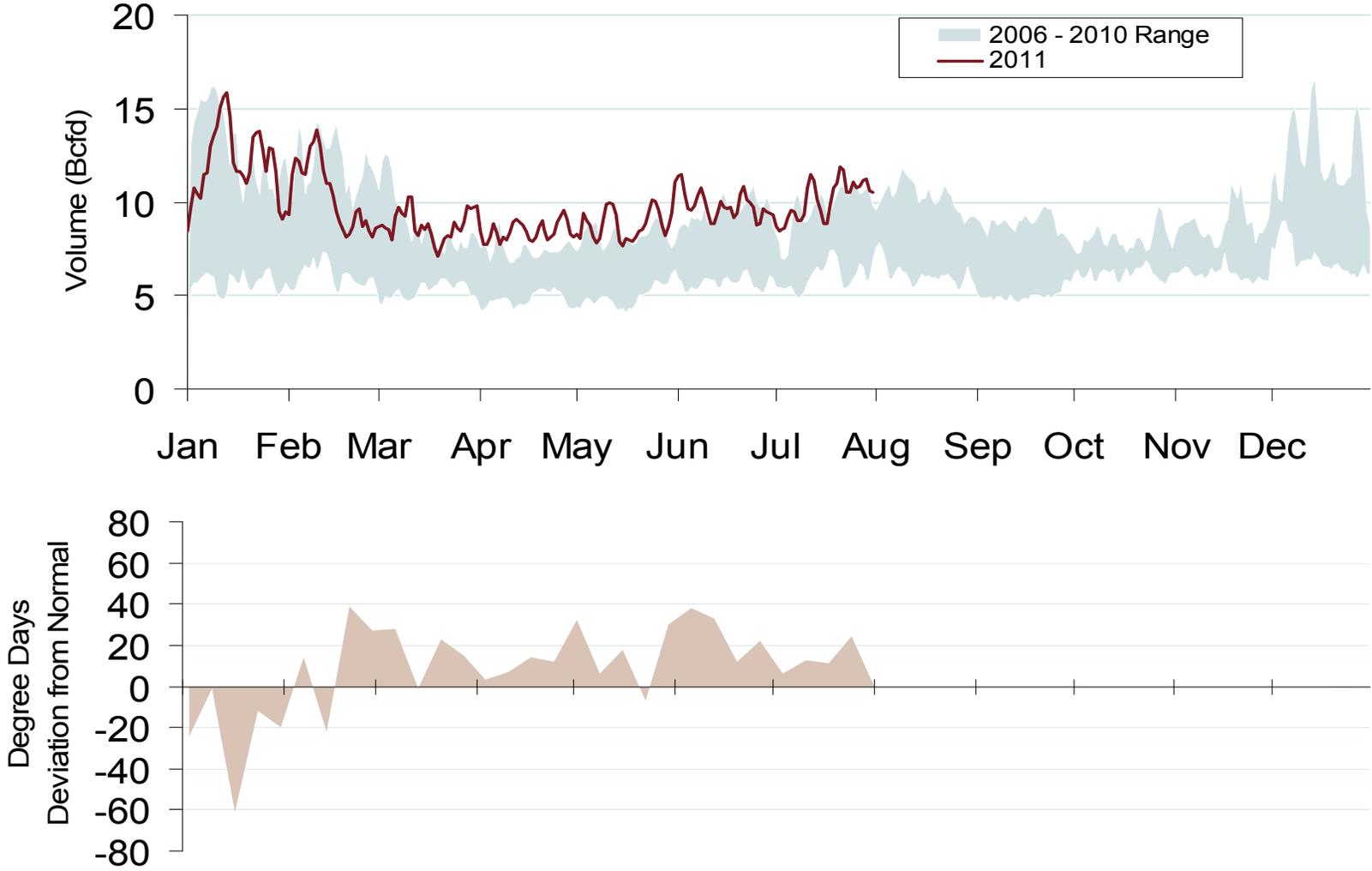
# Total U.S. Natural Gas Demand (All Sectors) and Temperatures



Source: Derived from *Bentek Energy* and *Weekly NOAA* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

### Daily Southeast Natural Gas Demand - All Sectors

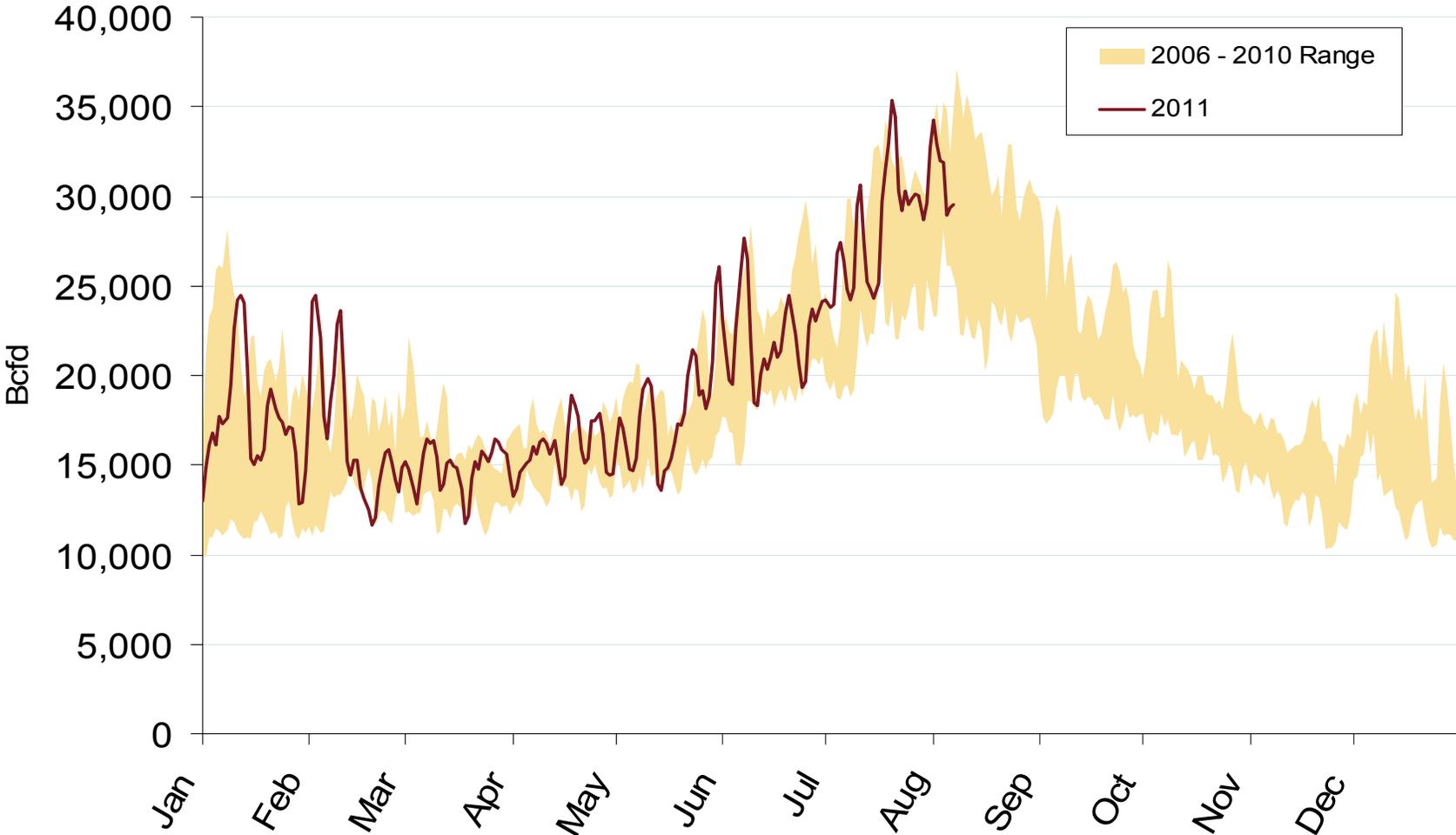


Source: Derived from *Bentek Energy* and Weekly NOAA data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

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

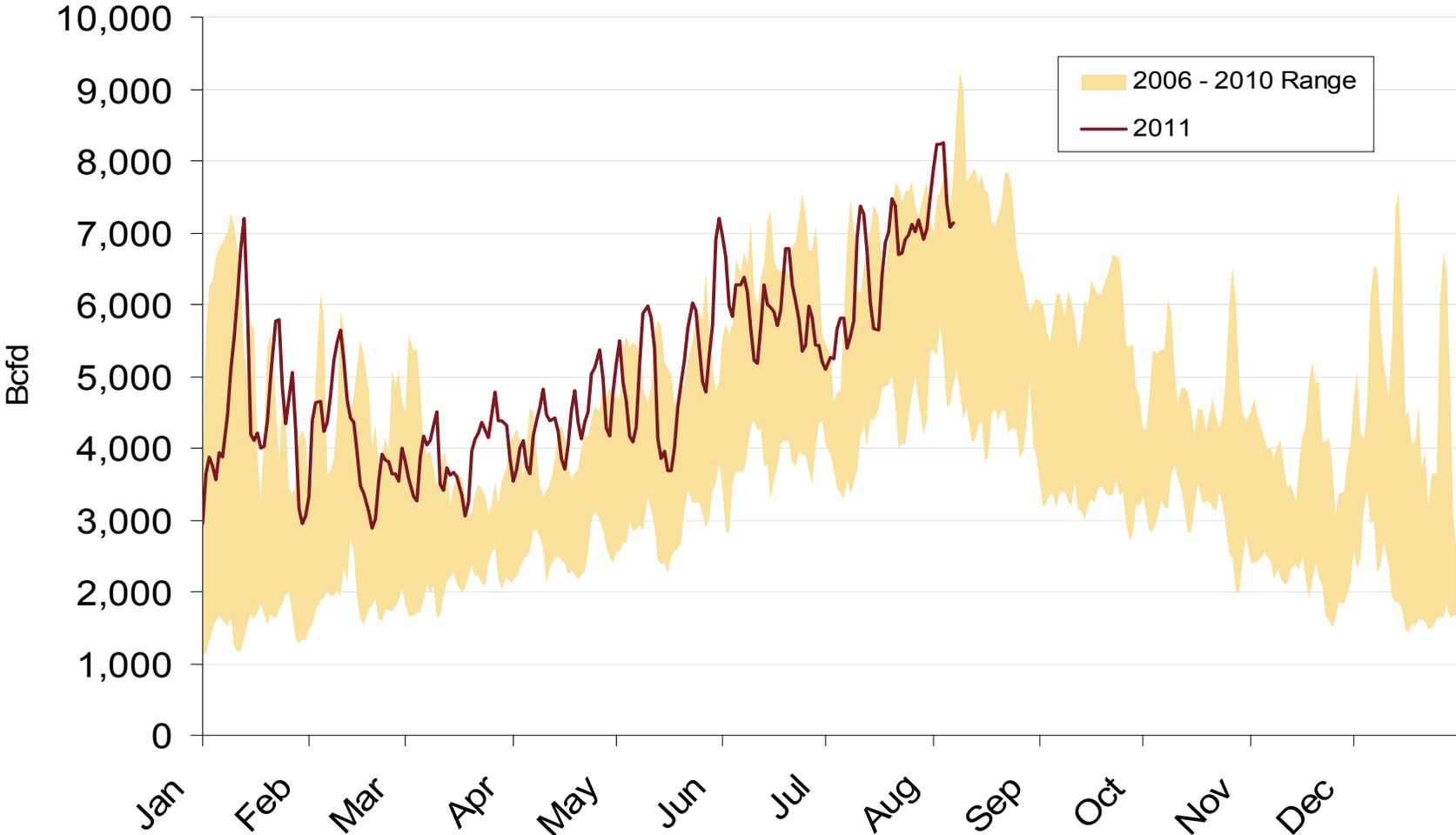
# U.S. Natural Gas Consumption for Power Generation



Source: Derived from *Bentek Energy* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

# Southeast Natural Gas Consumption for Power Generation



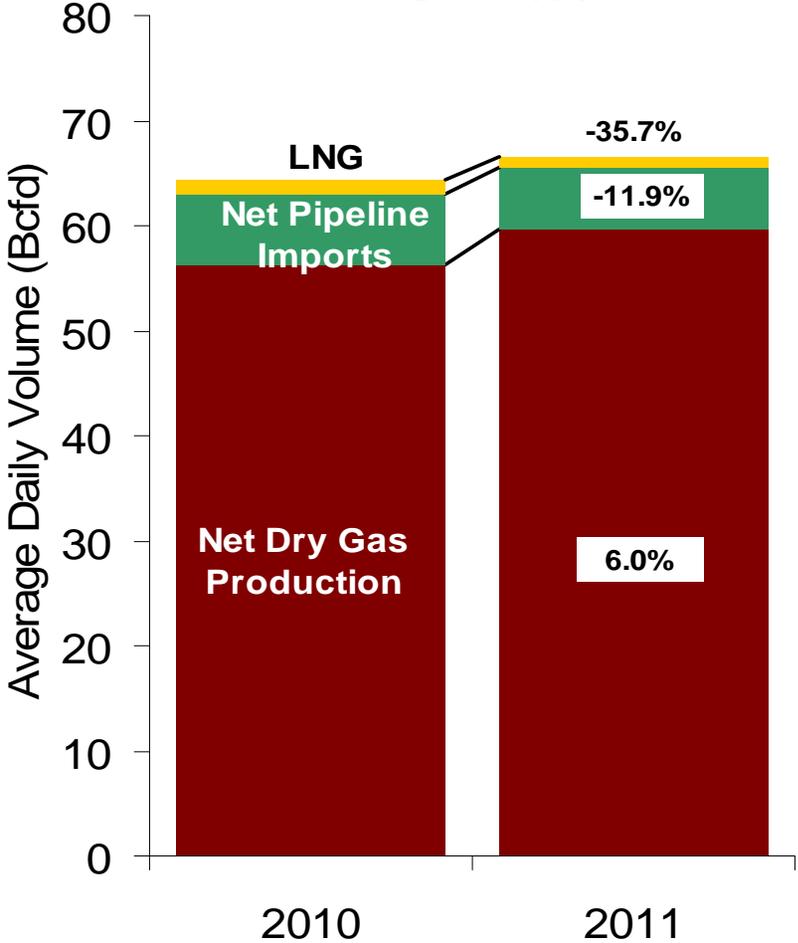
Source: Derived from *Bentek Energy* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

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

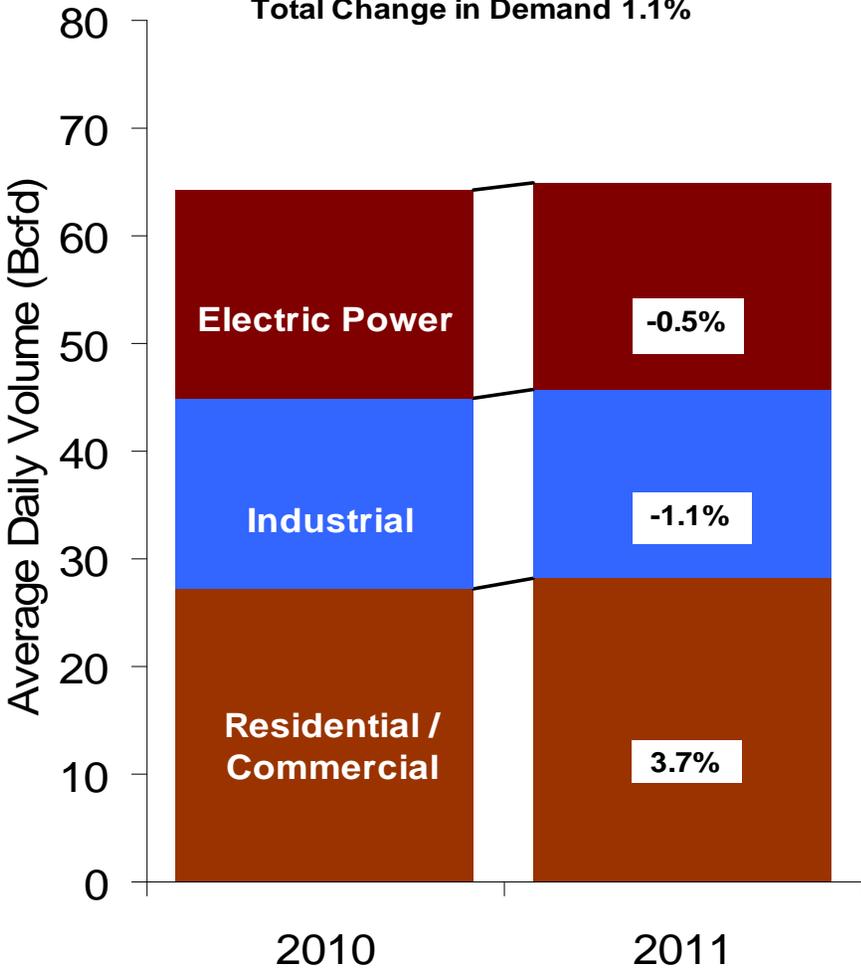
### US Natural Gas Supply

Total Change in Supply 3.3%



### US Natural Gas Demand

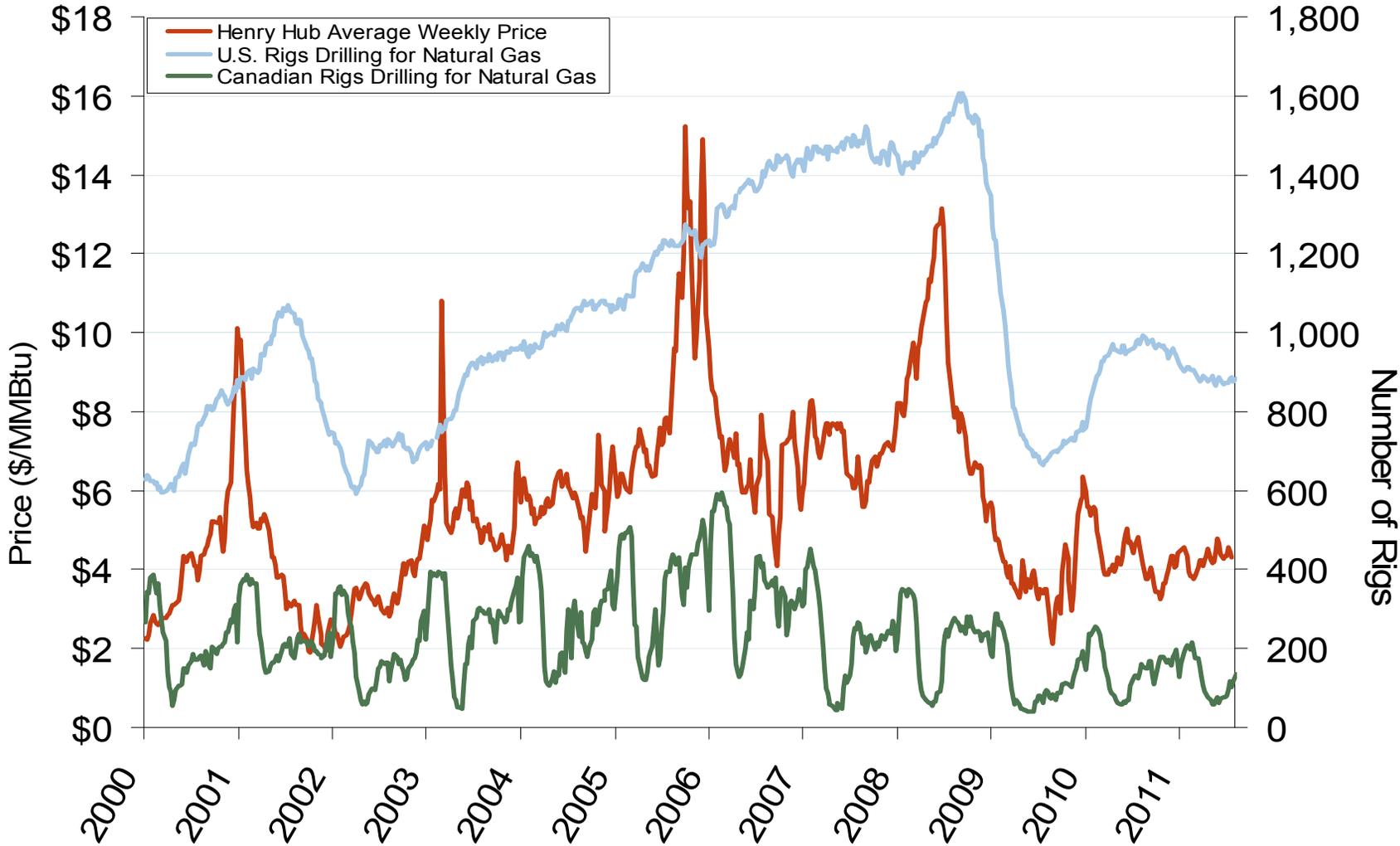
Total Change in Demand 1.1%



Source: Derived from *Bentek Energy* data  
August 2011 Southeast Snapshot Report

Updated: August 03, 2011

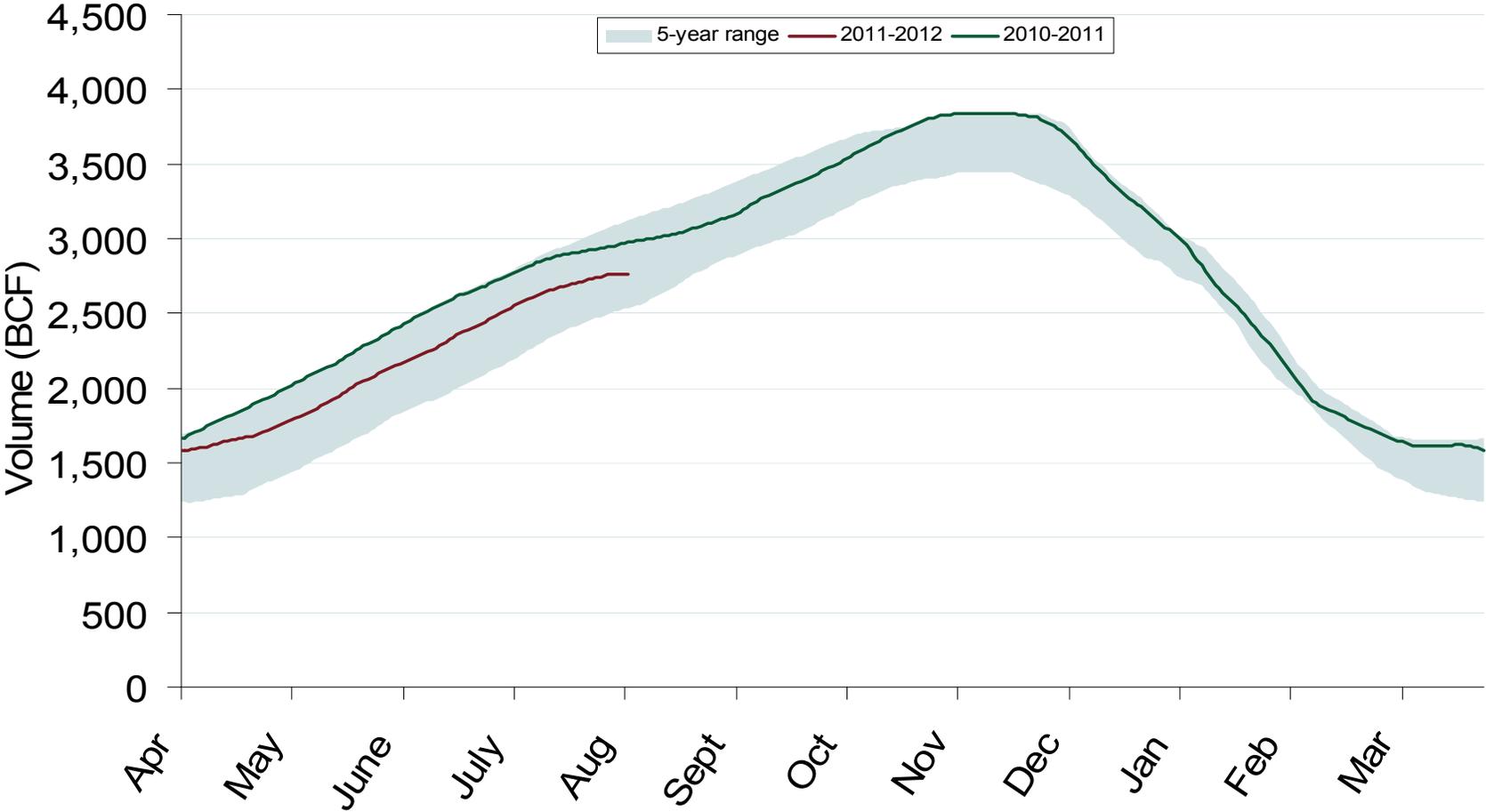
# U.S. and Canadian NG Drilling Rig Count and Daily Spot Prices



Source: Derived from *Platts* and *Baker Hughes* data  
August 2011 Southeast Snapshot Report

Updated: August 08, 2011

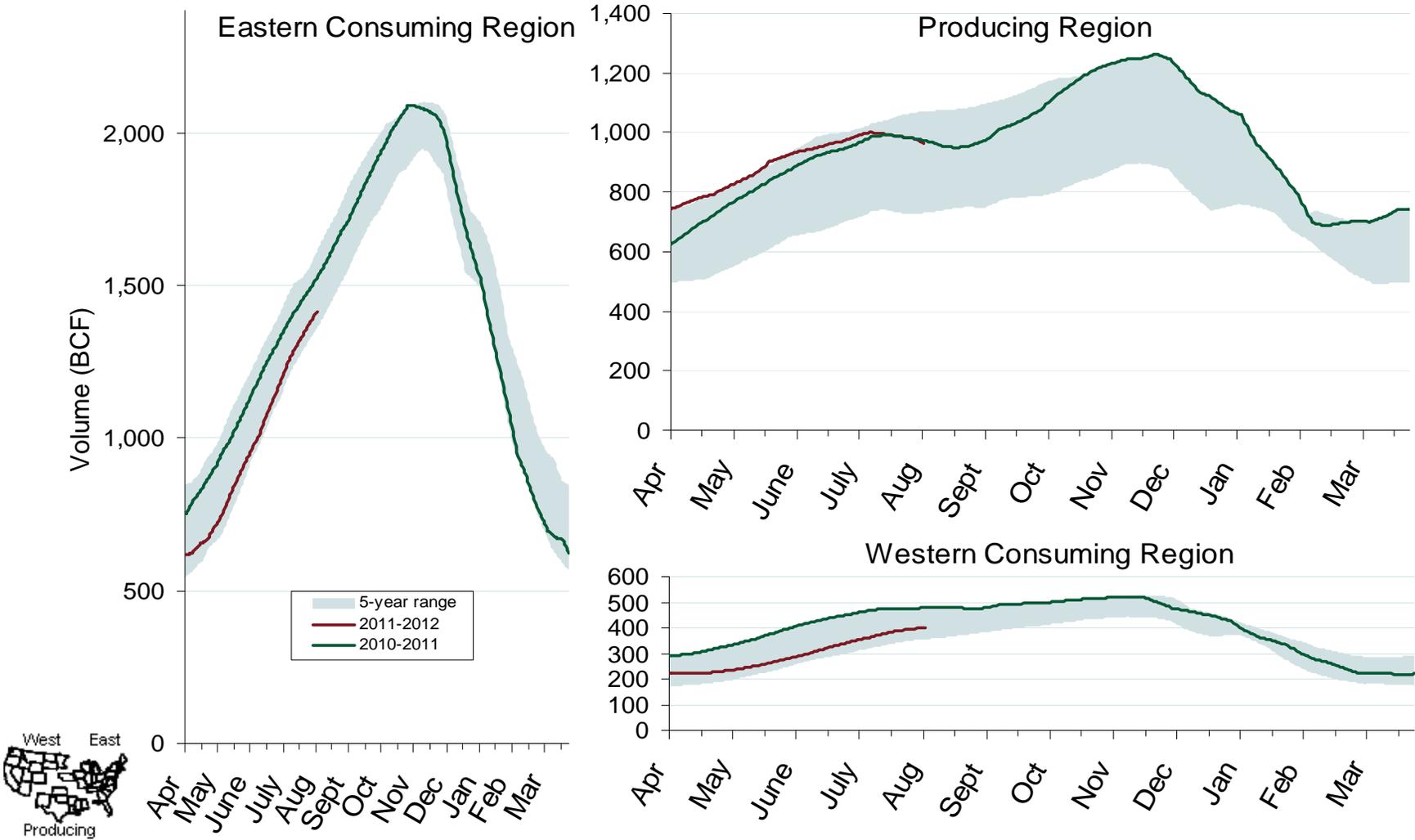
### Total U.S. Working Gas in Storage



Source: Derived from EIA data  
August 2011 Southeast Snapshot Report

Updated: August 09, 2011

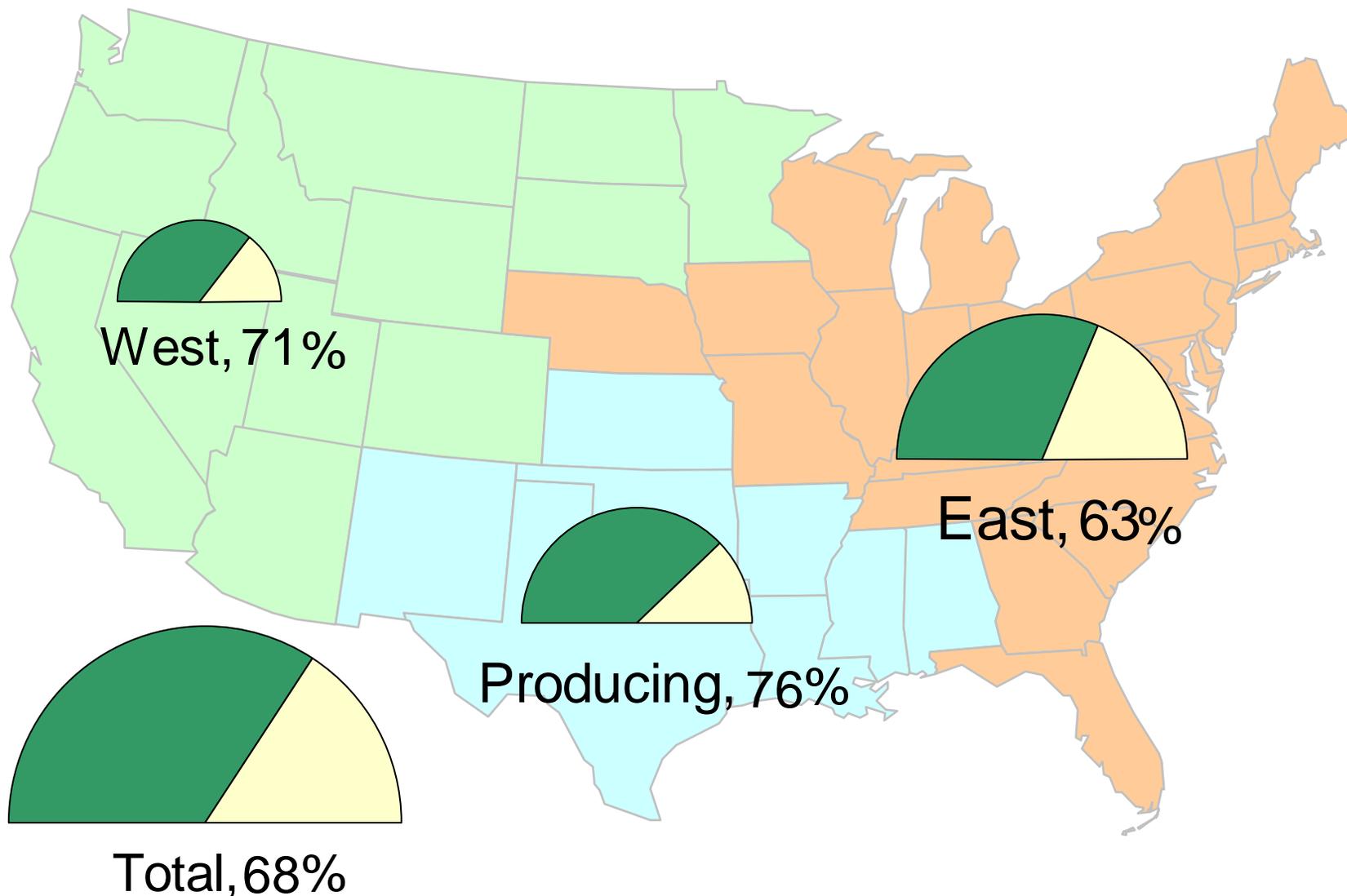
# Regional Totals of Working Gas in Storage



Source: Derived from EIA data. August 2011 Southeast Snapshot Report

Updated August 5, 2011

## Natural Gas Storage Inventories – August 1, 2011



## World LNG Estimated September 2011 Landed Prices

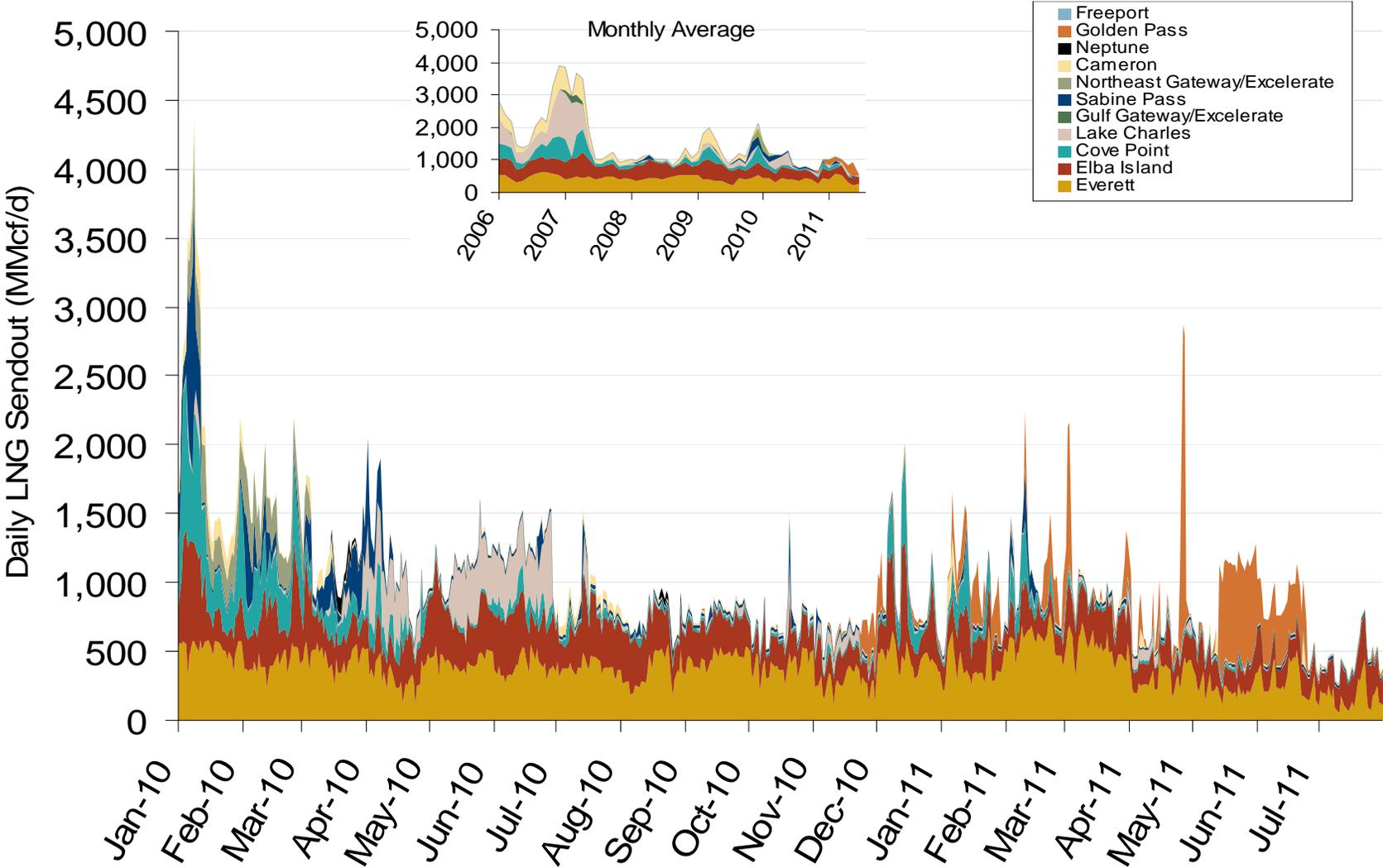


Source: *Waterborne Energy, Inc.* Data in \$US/MMBtu.

August 2011 Southeast Snapshot Report

Updated August 5, 2011 3024

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



Notes: 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

Source: Derived from Bentek Energy data

August 2011 Southeast Snapshot Report

Updated: August 03, 2011