

OE ENERGY MARKET SNAPSHOT

Mid-Atlantic States Version – September 2011 Data

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

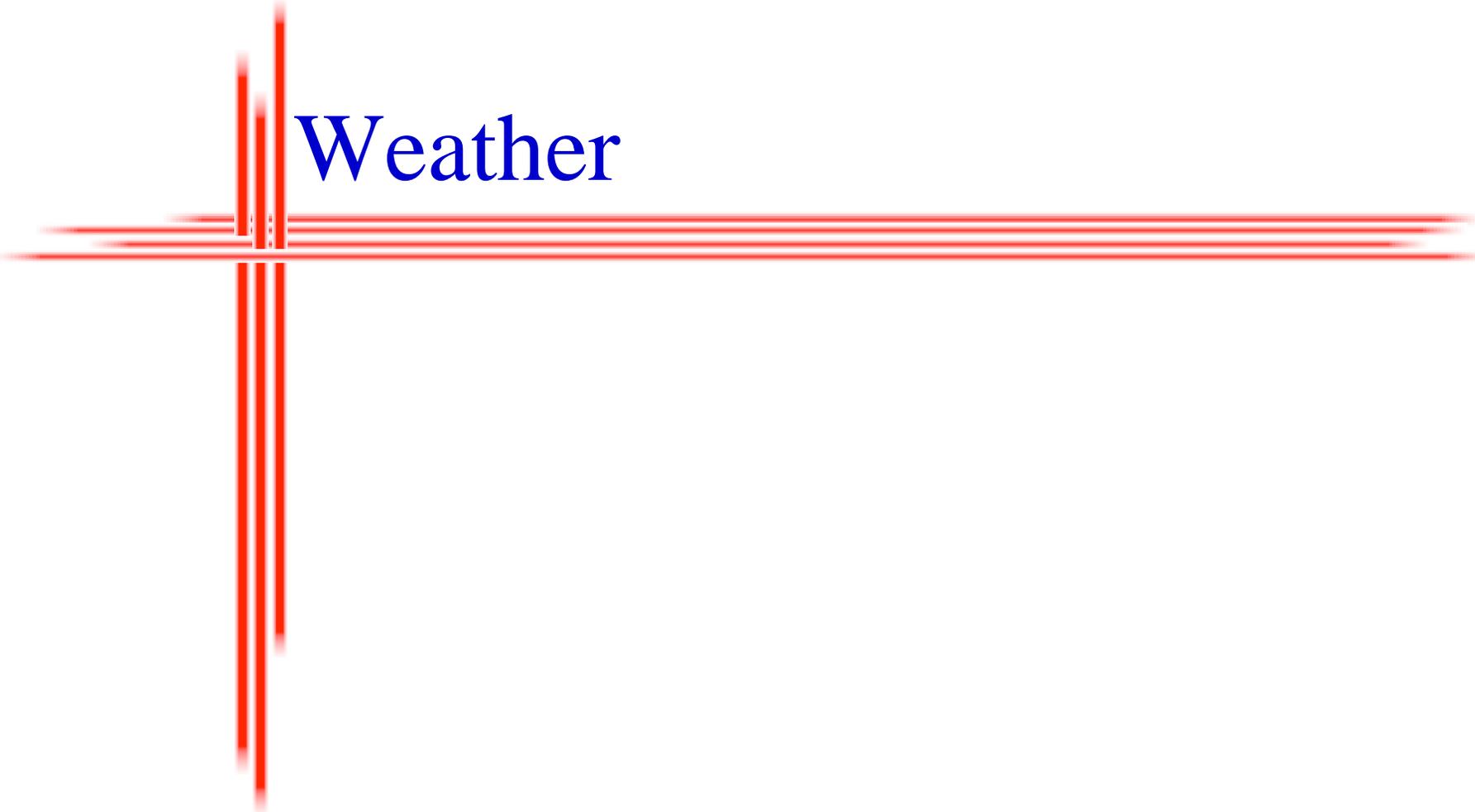
Office of Enforcement
Federal Energy Regulatory Commission
October 2011



Infrastructure Report

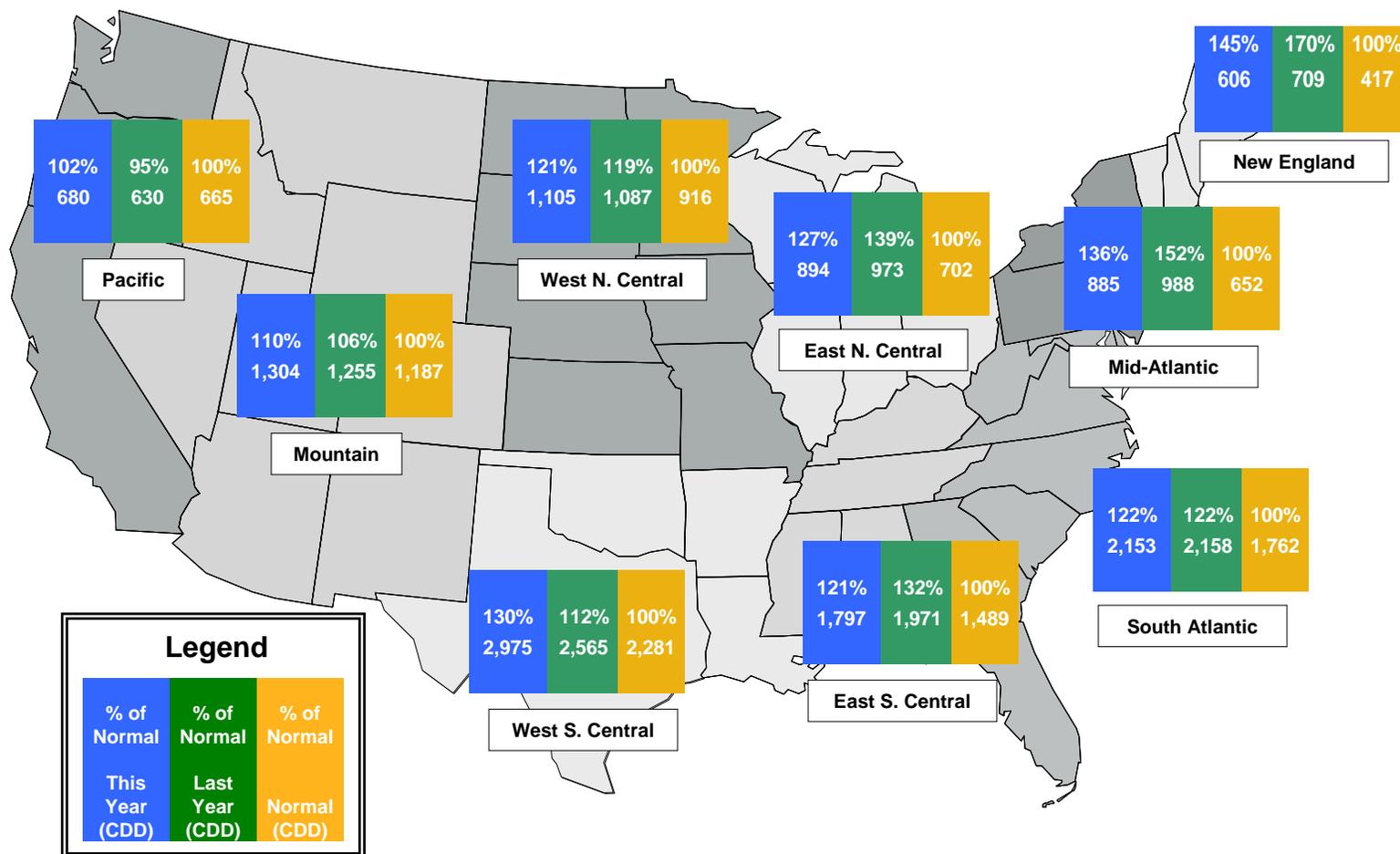
Infrastructure Report

<http://www.ferc.gov/legal/staff-reports/09-19-11-energy-infrastructure.pdf>



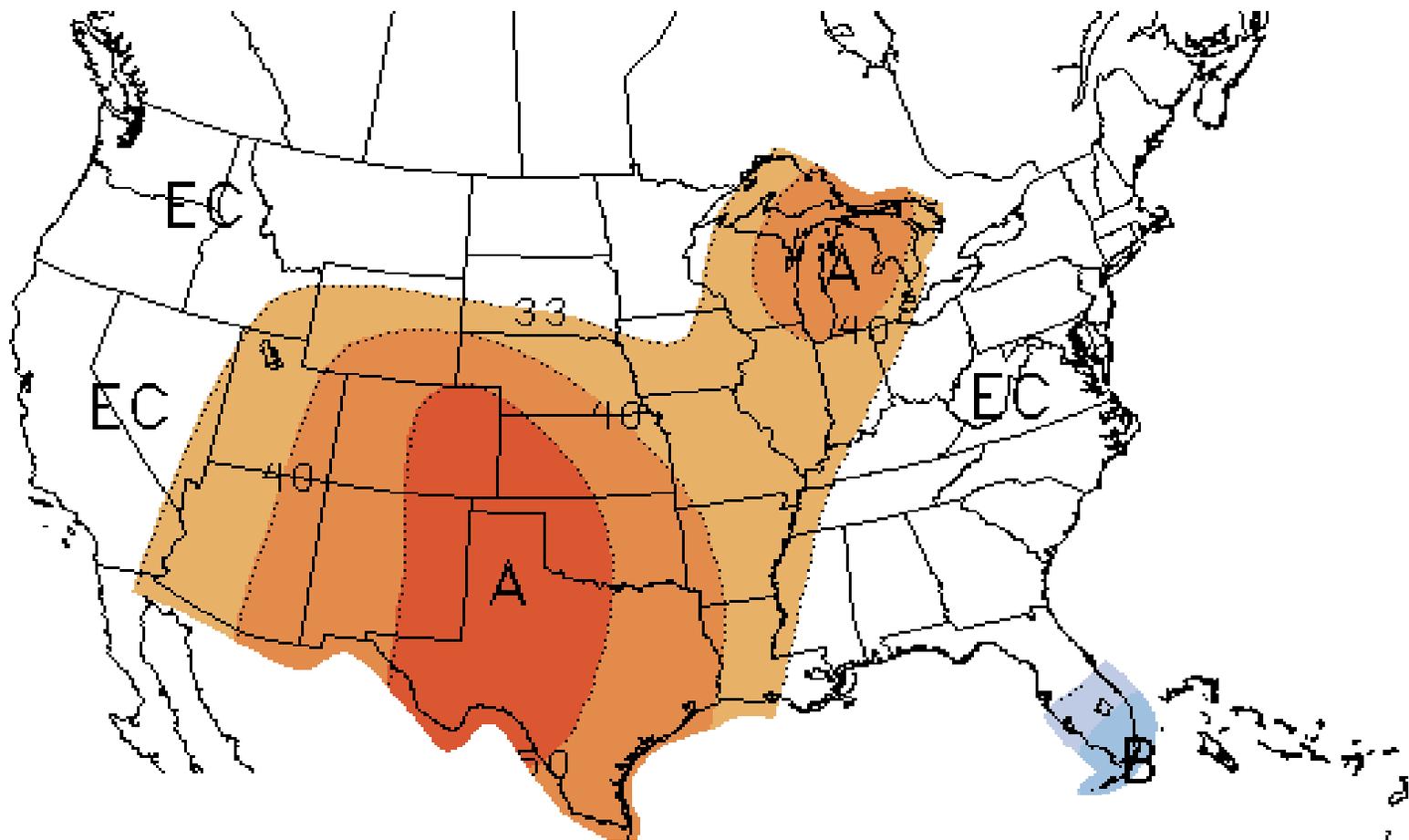
Weather

Regional Cooling Degree Days – January Through September 2011



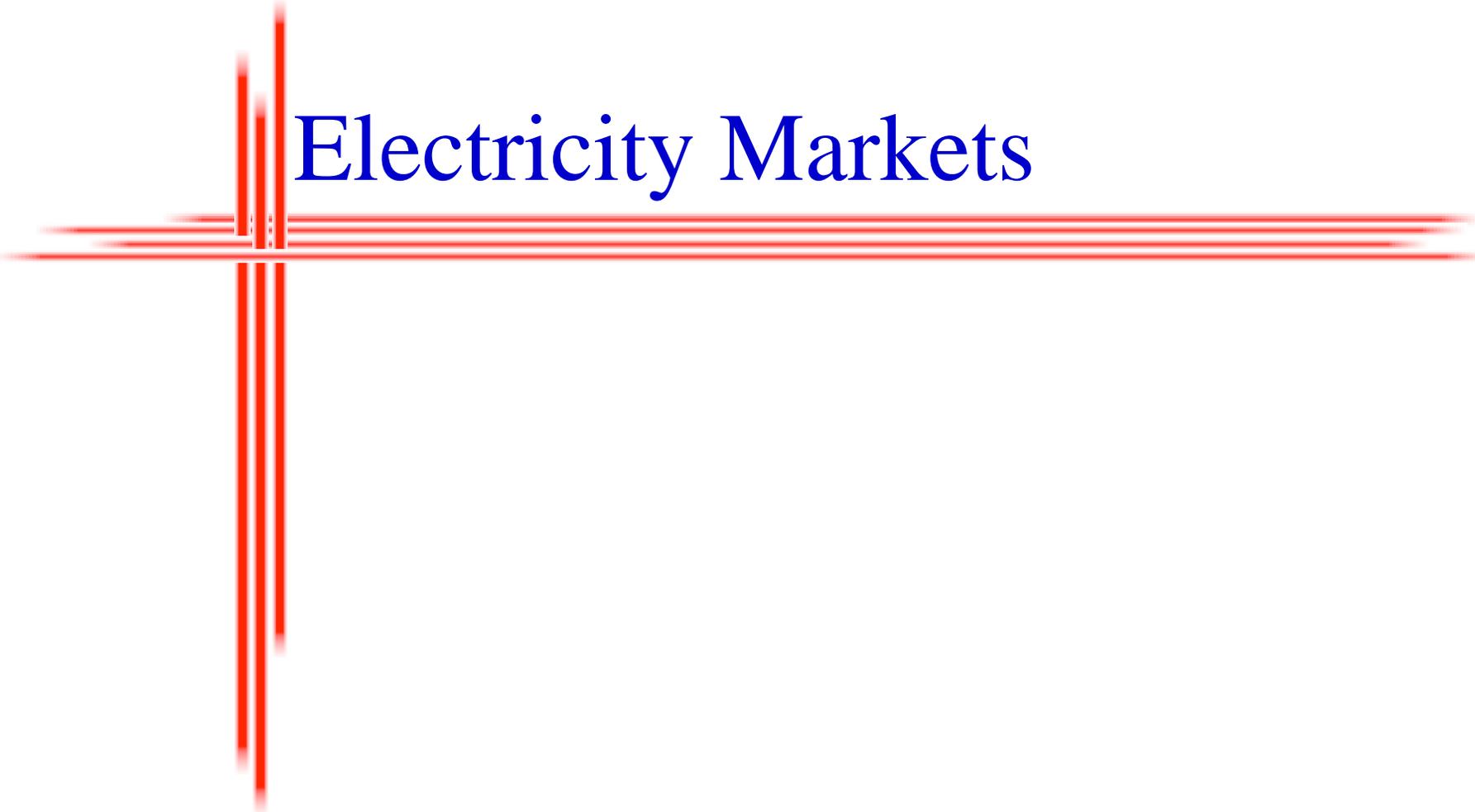
Source: Derived from NOAA data. Normal is based on a 30-year average of cooling degree day data.
 October 2011 Mid-Atlantic Snapshot

NOAA's 3 Month Temperature Forecast Made September 15, 2011, Valid for Oct – Dec 2011



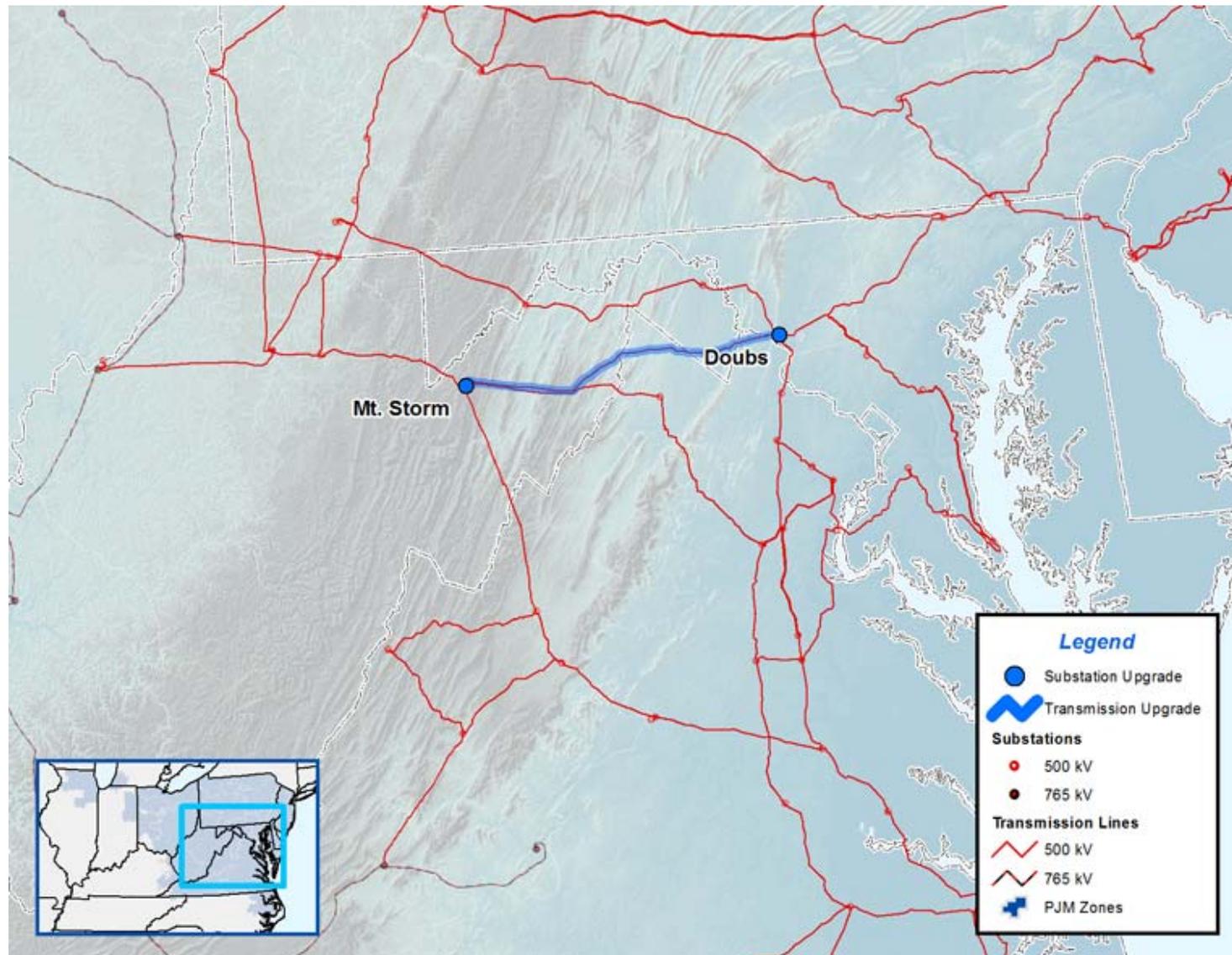
Note: "A" areas are above normal, "B" areas are below normal and "EC" means equal chance. Normal is based on the last 30 years of data.
Source: Derived from NOAA data.

Updated October 4, 2011

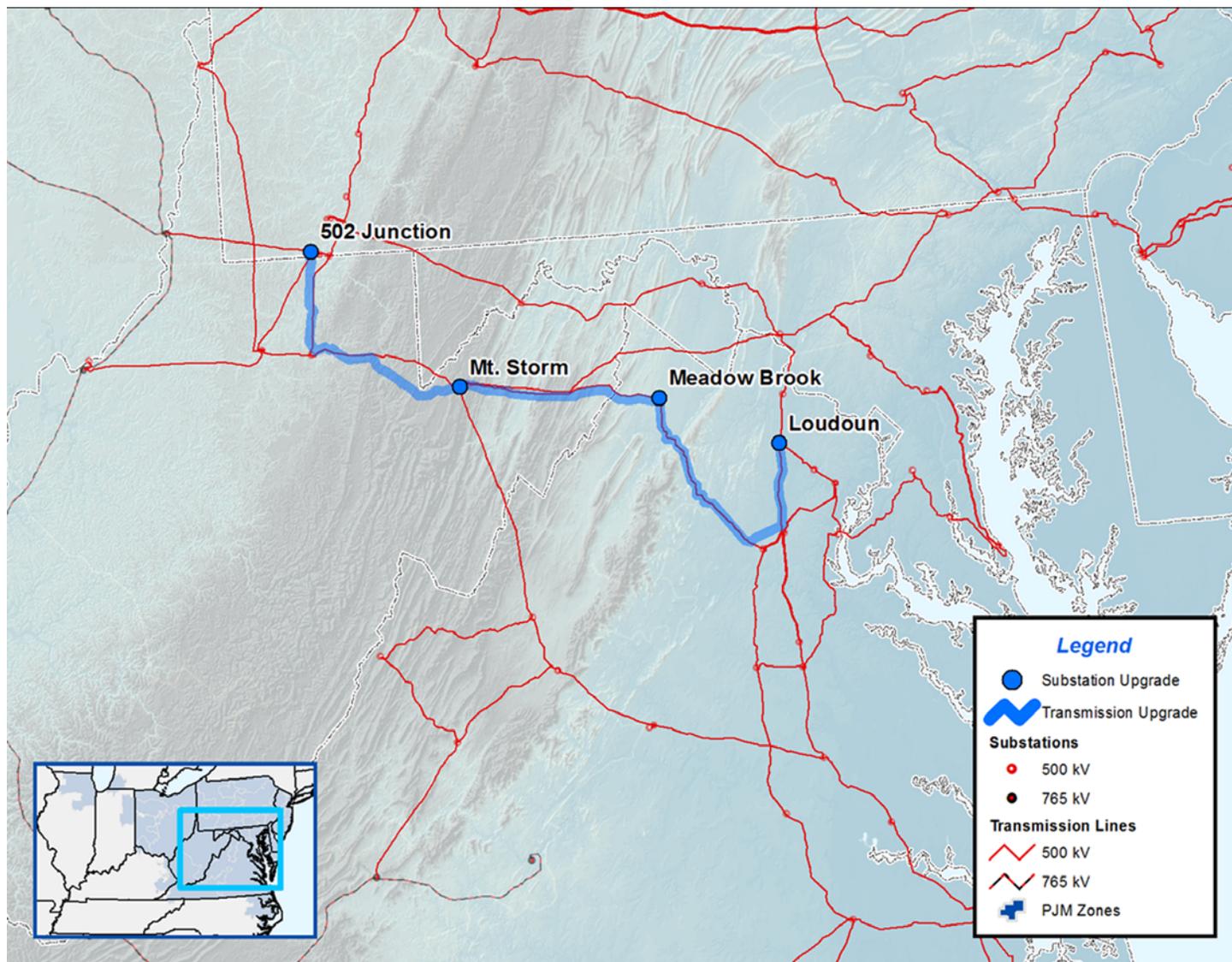


Electricity Markets

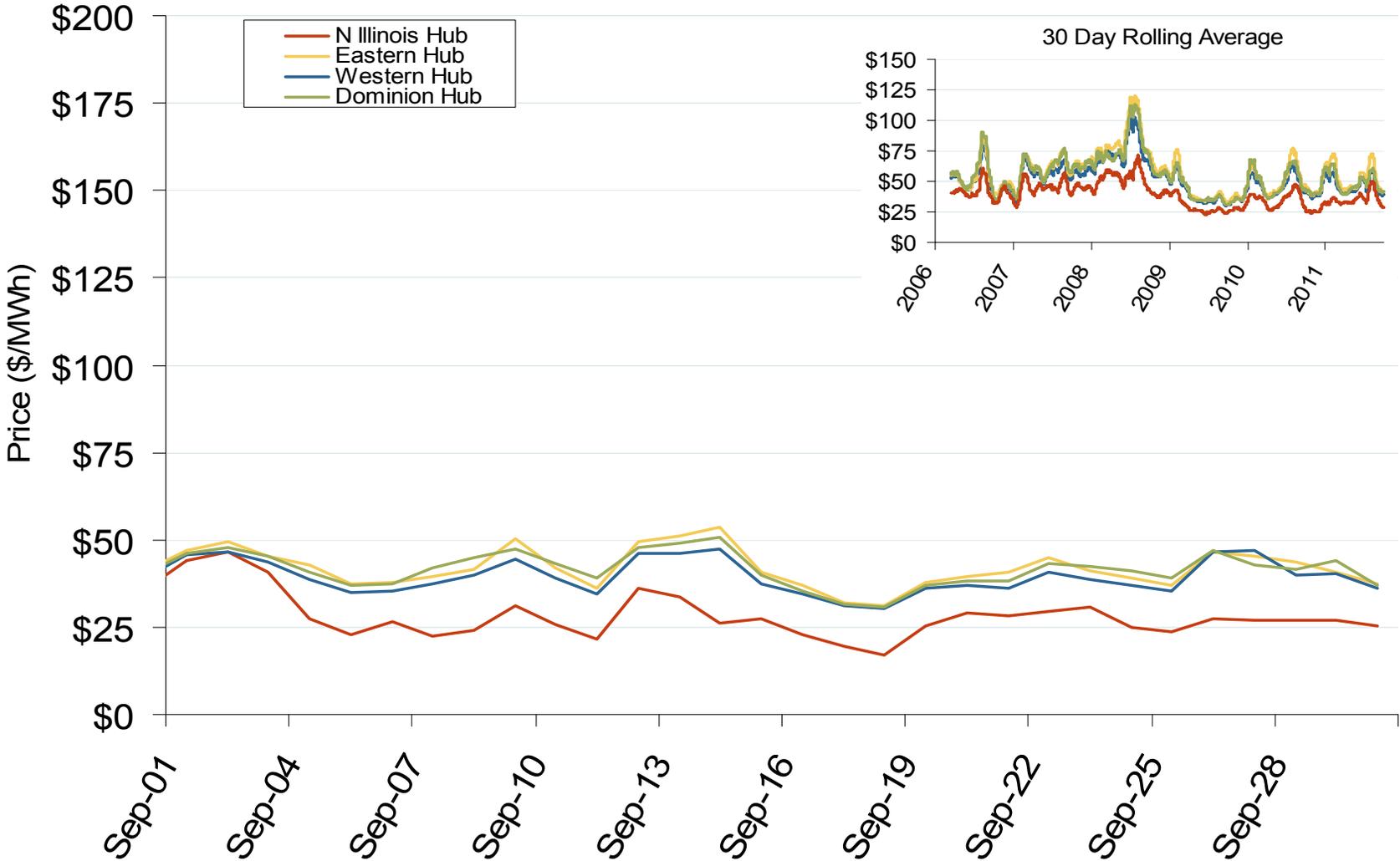
Mt Storm Doubs Is a Major PJM Transmission Path



TrAIL Parallels Mt. Storm Doubs Line



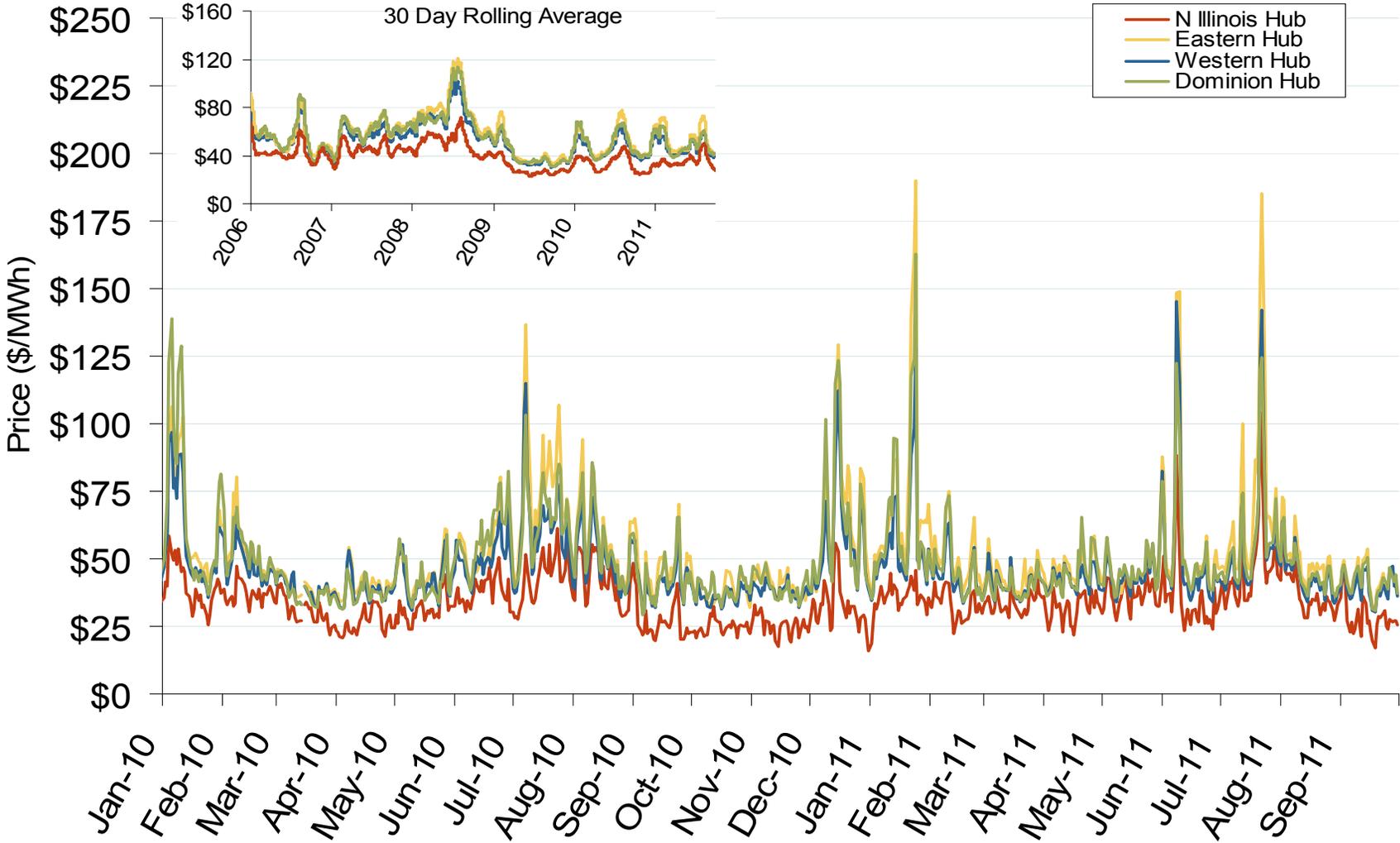
Daily Average of PJM Day-Ahead Prices - All Hours



Source: Derived from *Bloomberg* data
October 2011 Mid-Atlantic Snapshot

Updated: October 03, 2011

Daily Average of PJM Day-Ahead Prices - All Hours

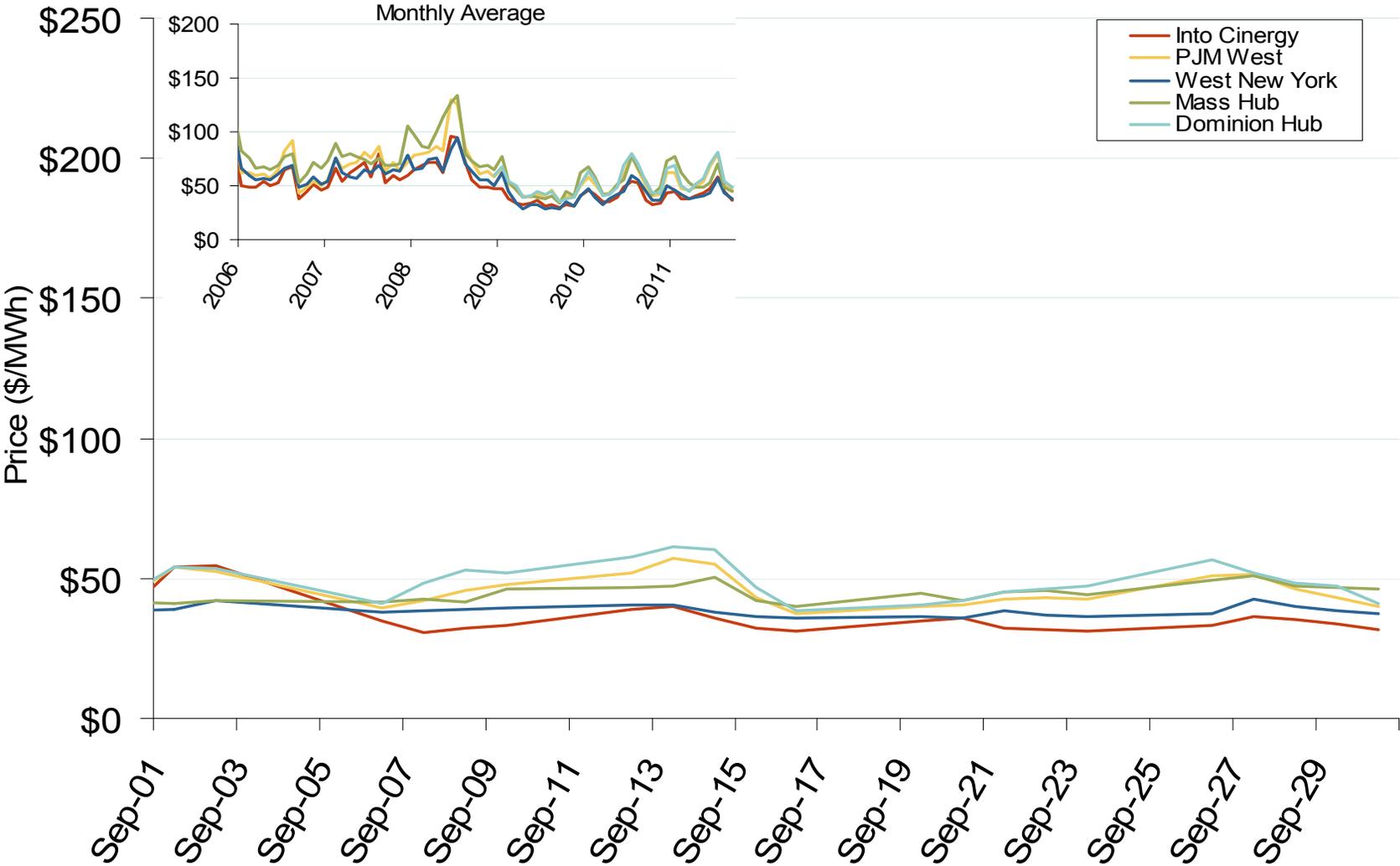


Source: Derived from Bloomberg data
October 2011 Mid-Atlantic Snapshot

Updated: October 03, 2011

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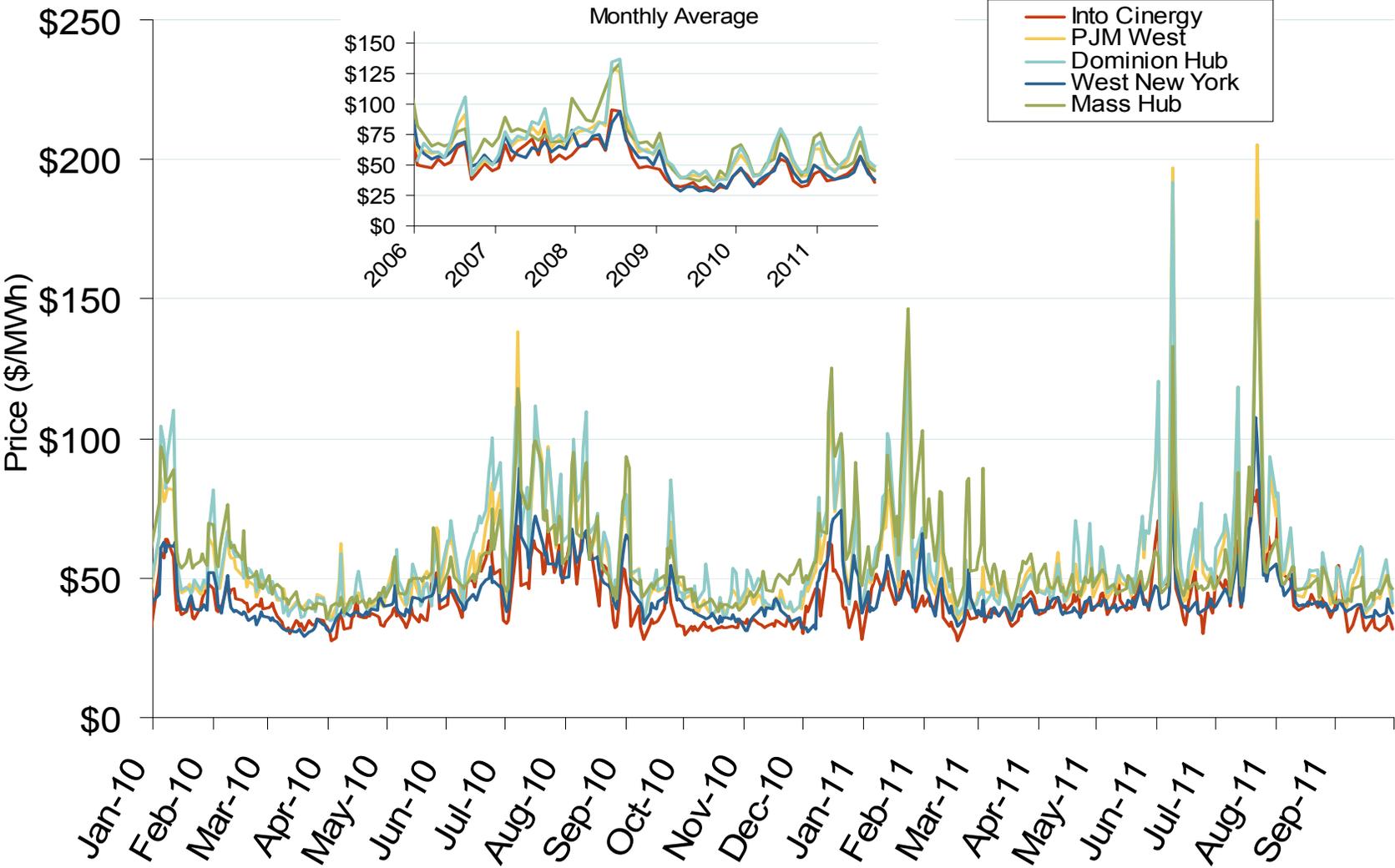
Eastern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data
October 2011 Mid-Atlantic Snapshot

Updated: October 03, 2011

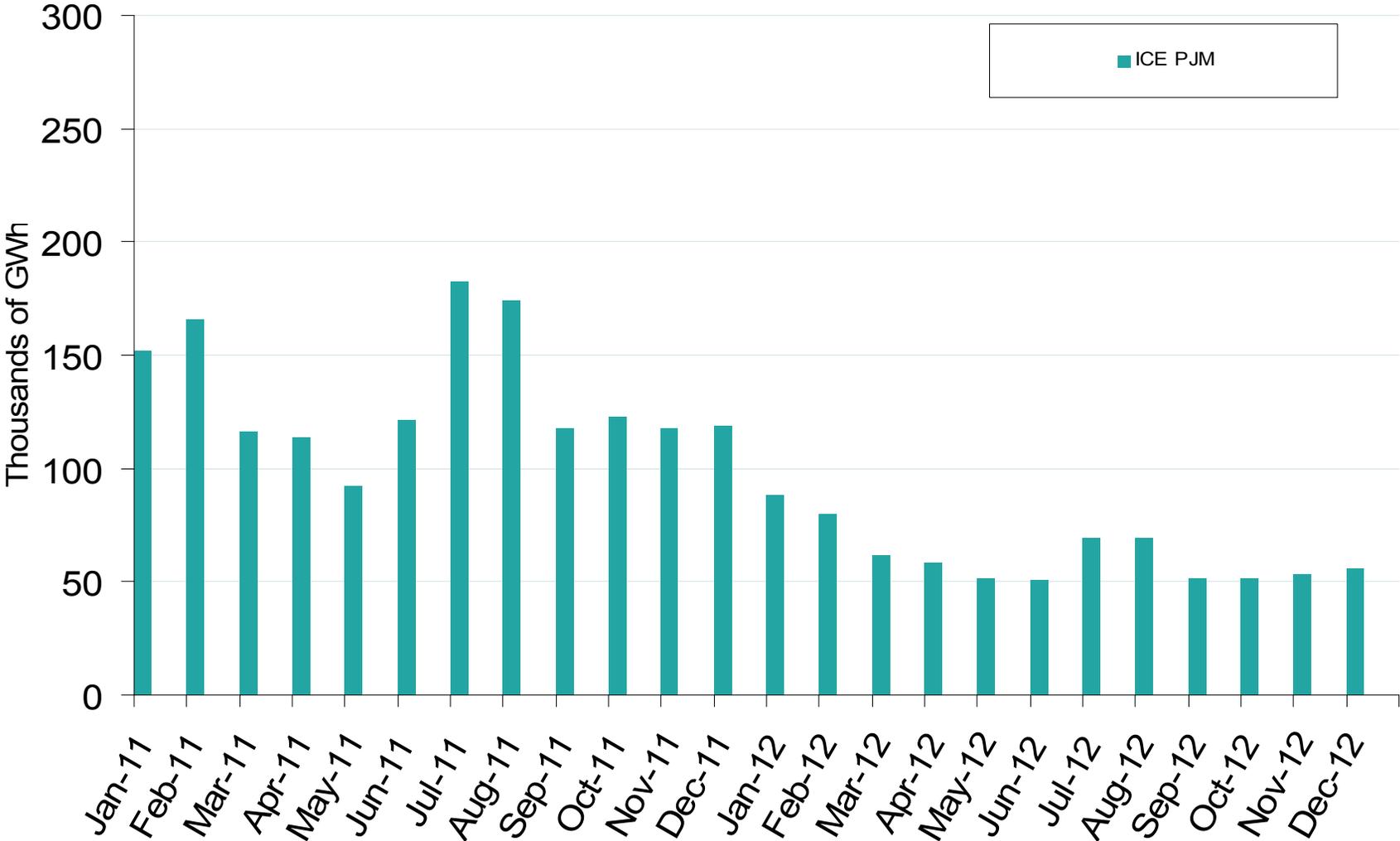
Eastern Daily Bilateral Day-Ahead On-Peak Prices



Source: Derived from *Platts* data
October 2011 Mid-Atlantic Snapshot

Updated: October 03, 2011

PJM Western Hub Forward and Swap Volumes



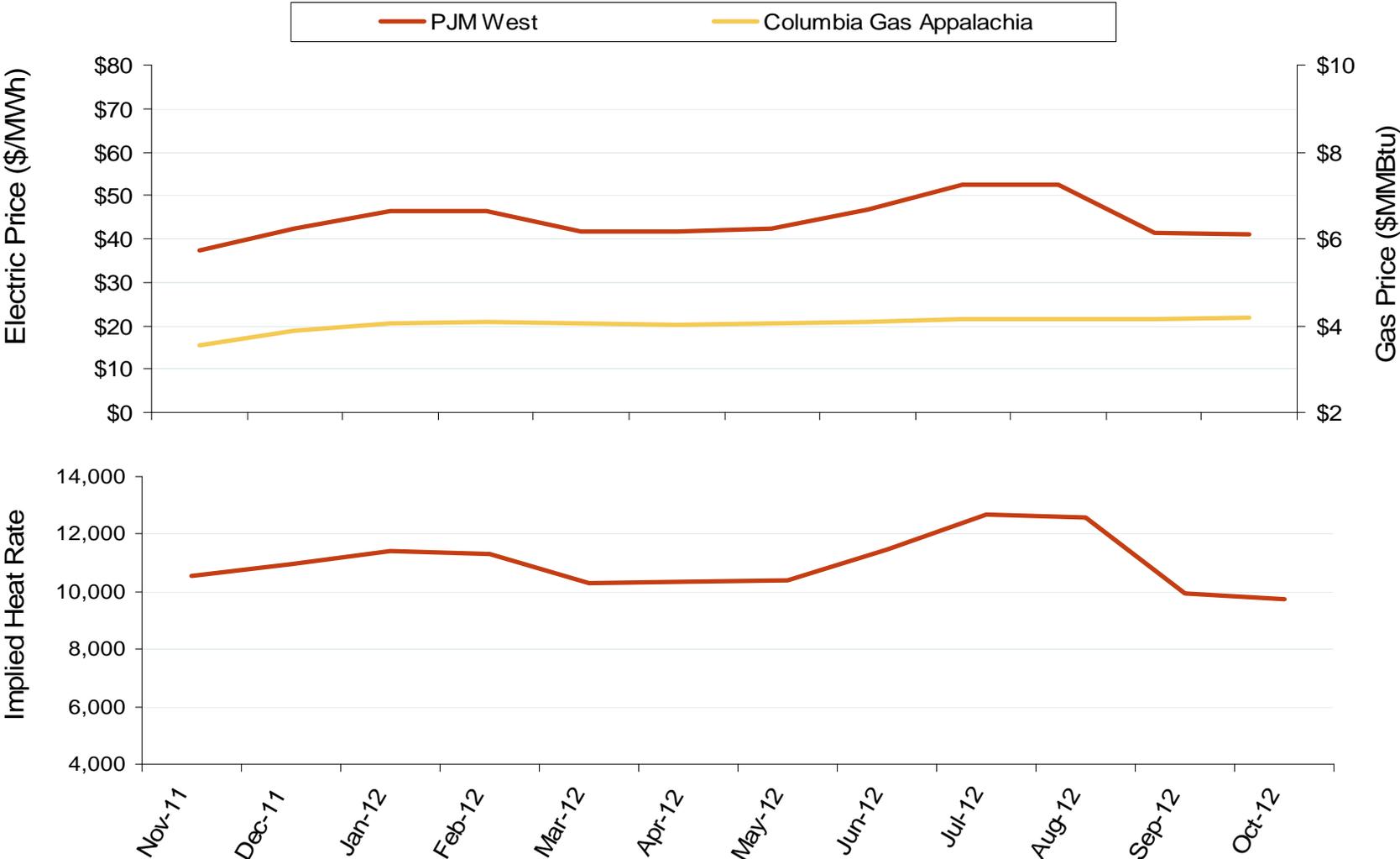
Notes: ICE on-peak forward (physical) and swap (financial) volumes are for PJM's Western Hub and include monthly, dual monthly, quarterly, and calendar year contracts traded for each month

Source: Derived from ICE data

October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

PJM West Electric Forward Price Curves and Implied Heat Rates



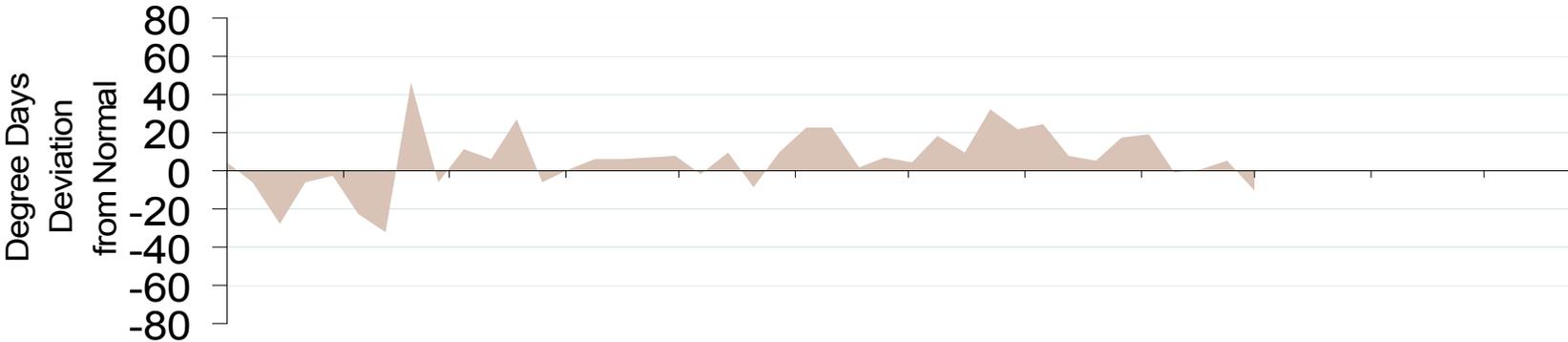
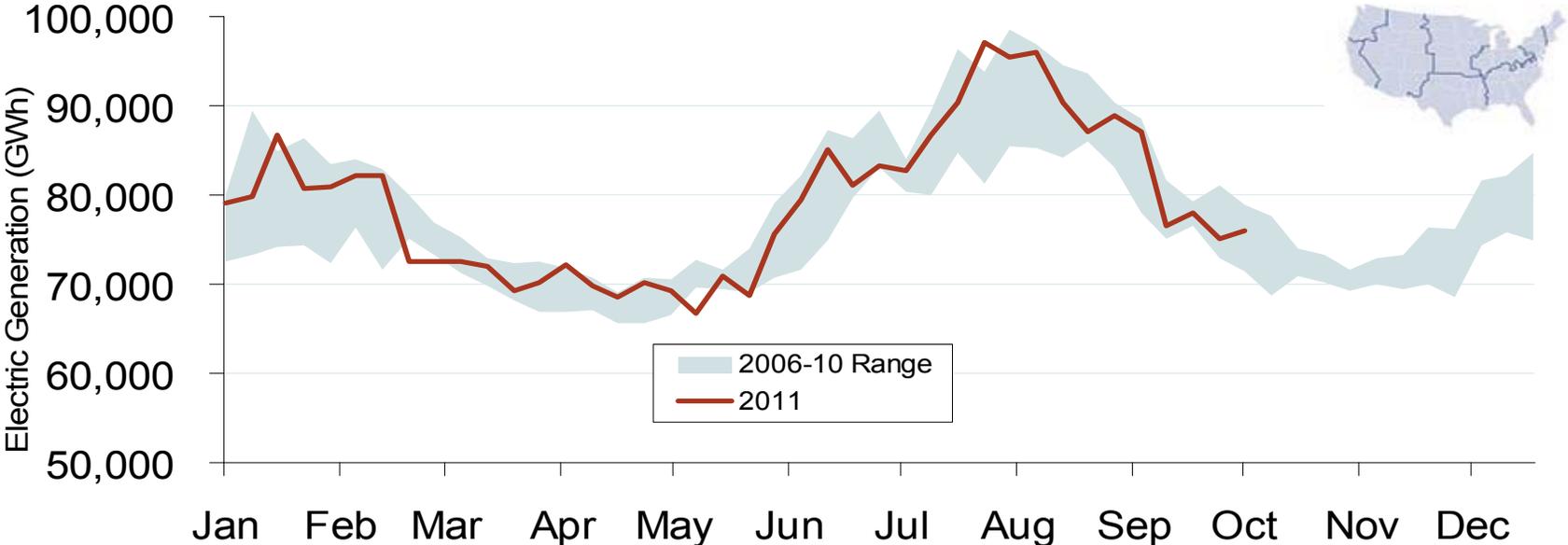
Source: Derived from Nymex data
October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

Southwest Annual Average Bilateral Prices

Annual Average Day Ahead On Peak Prices (\$/MWh)						
	2006	2007	2008	2009	2010	5-Year Avg
Four Corners	\$58.52	\$63.21	\$71.84	\$35.38	\$39.68	\$53.74
Palo Verde	\$57.59	\$61.74	\$71.87	\$34.77	\$38.76	\$52.96
Mead	\$59.93	\$64.49	\$75.63	\$36.58	\$40.11	\$55.36

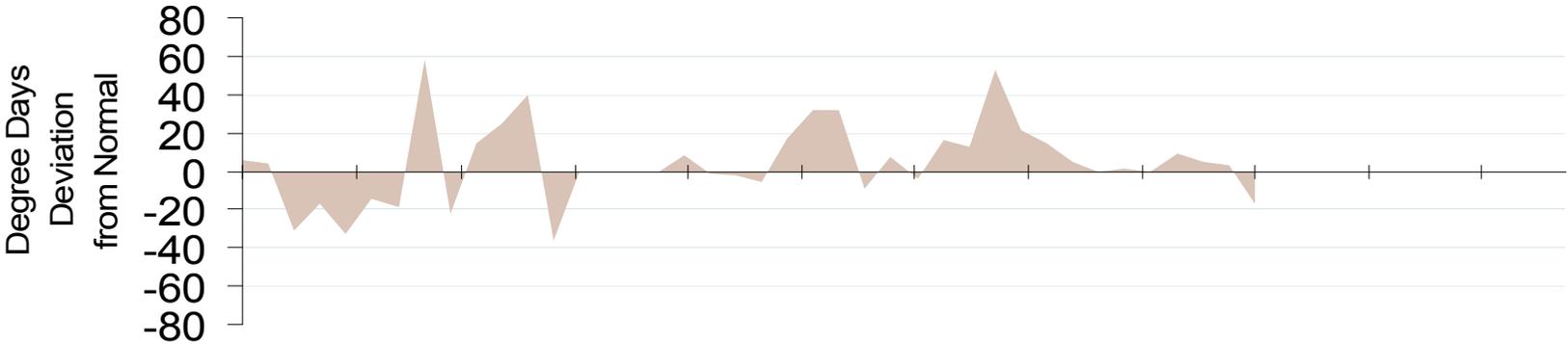
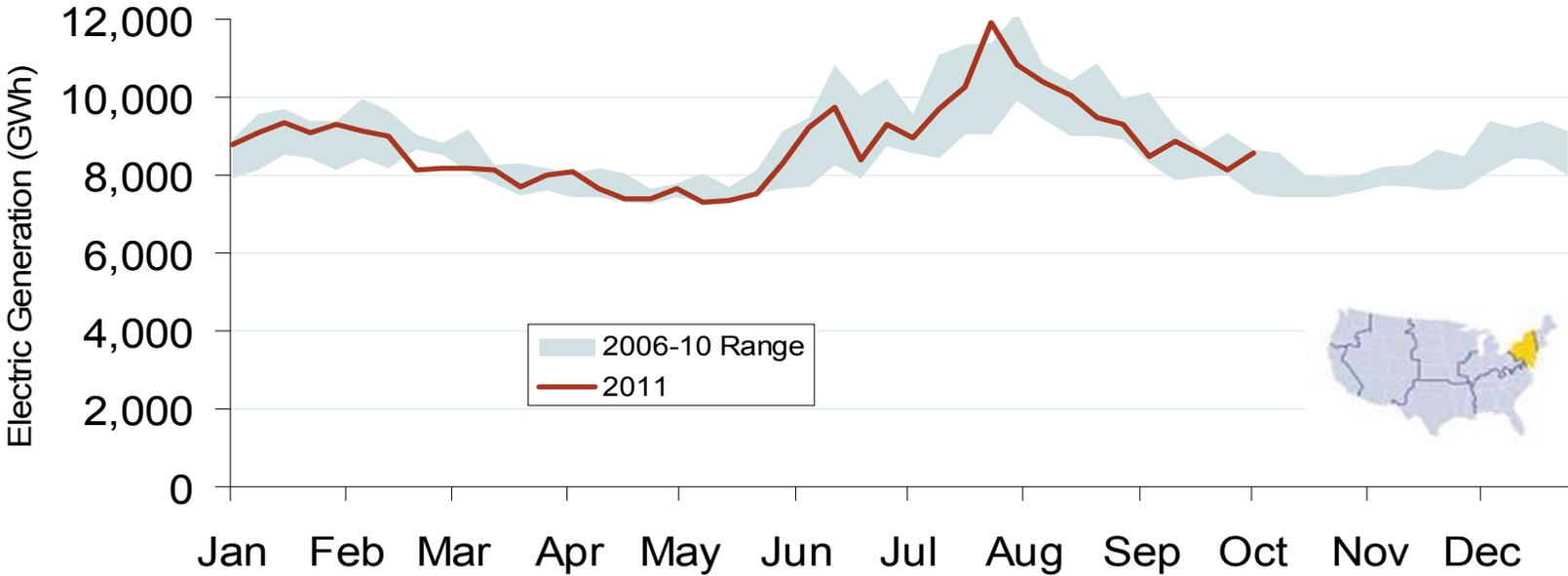
Weekly U.S. Electric Generation Output and Temperatures



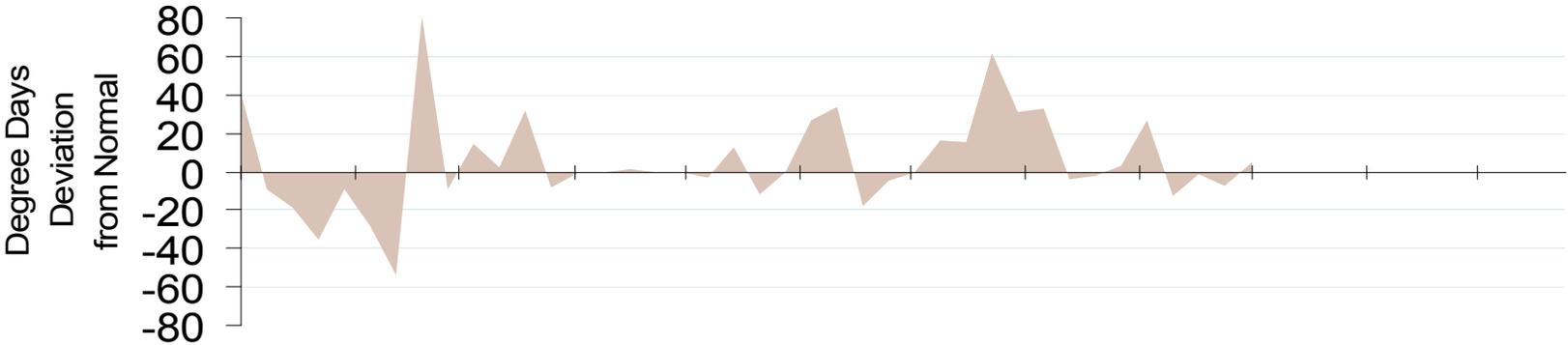
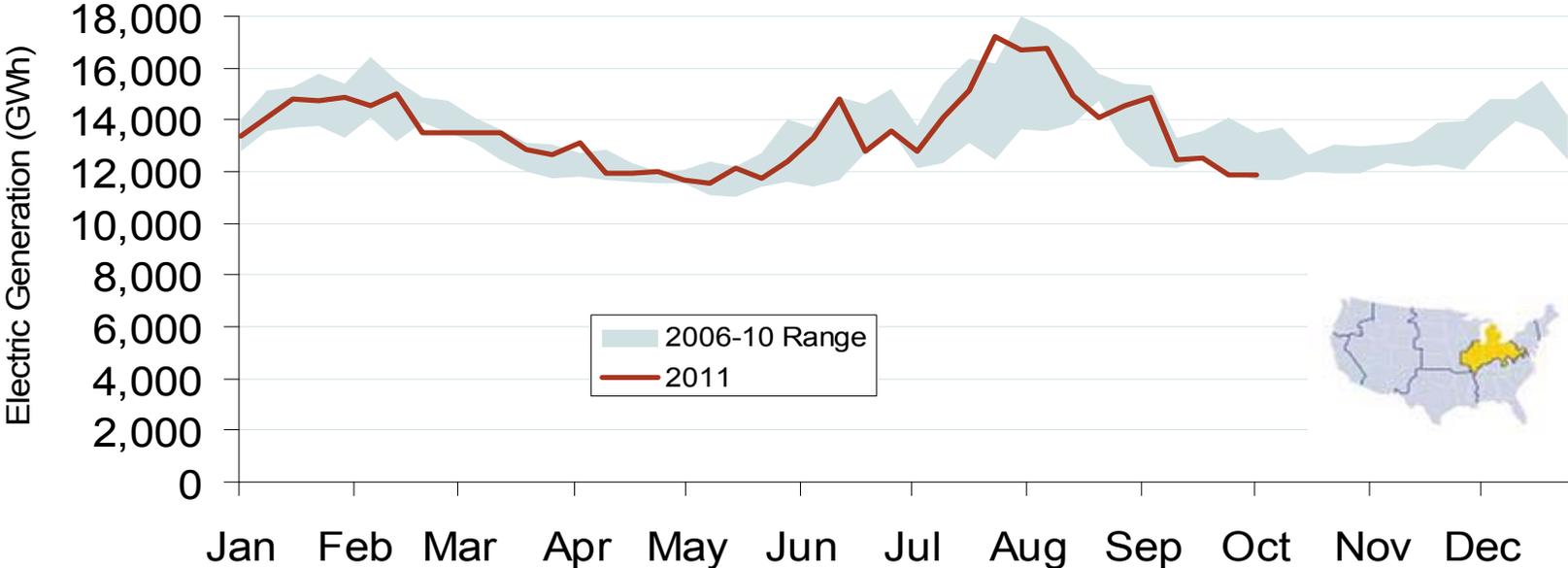
Source: Derived from EEI and NOAA data
October 2011 Mid-Atlantic Snapshot

Updated: October 06, 2011

Weekly Power Generation & Temps. - Mid Atlantic

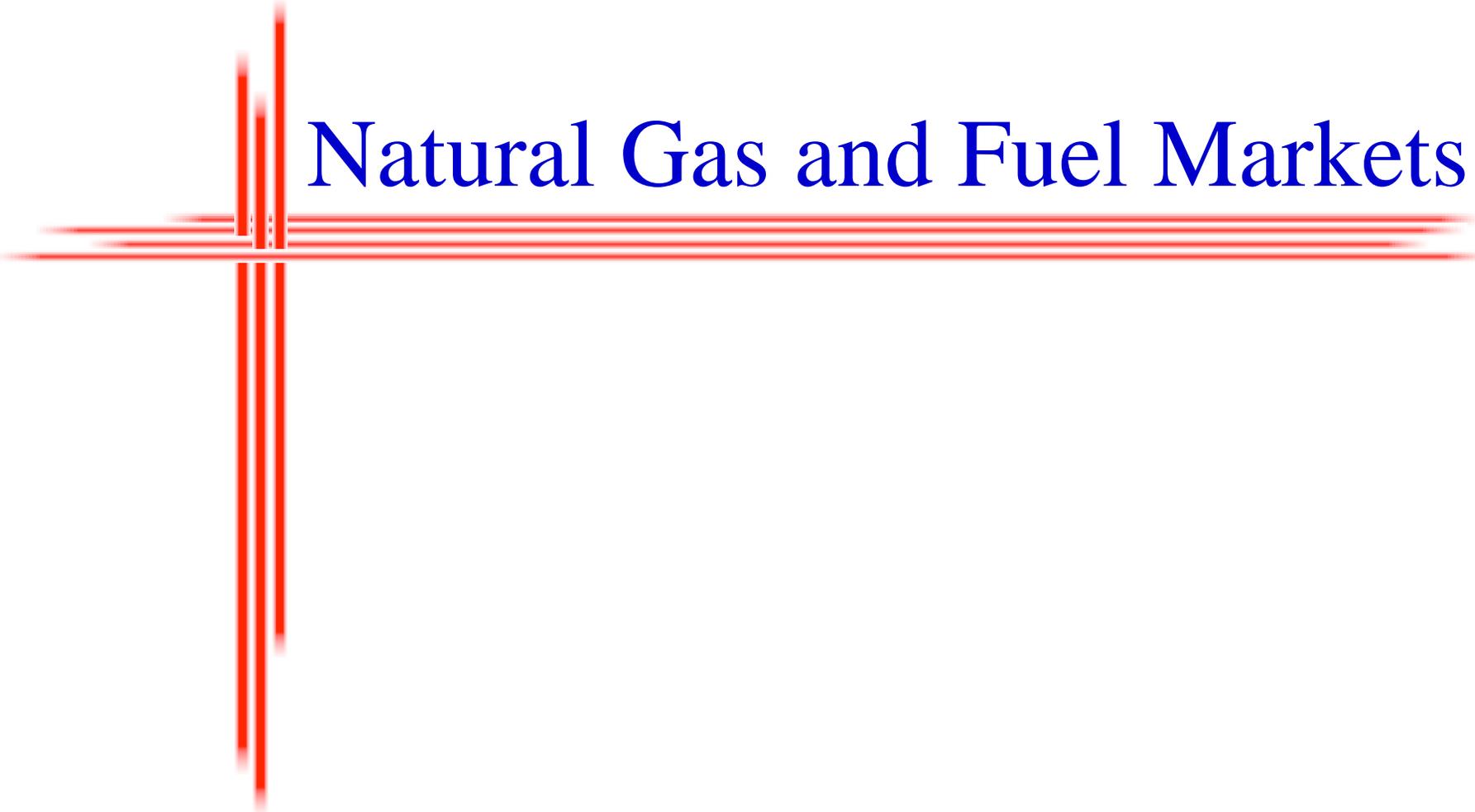


Weekly Power Generation & Temps. - Central Industrial Region



Source: Derived from EEI and NOAA data
October 2011 Mid-Atlantic Snapshot

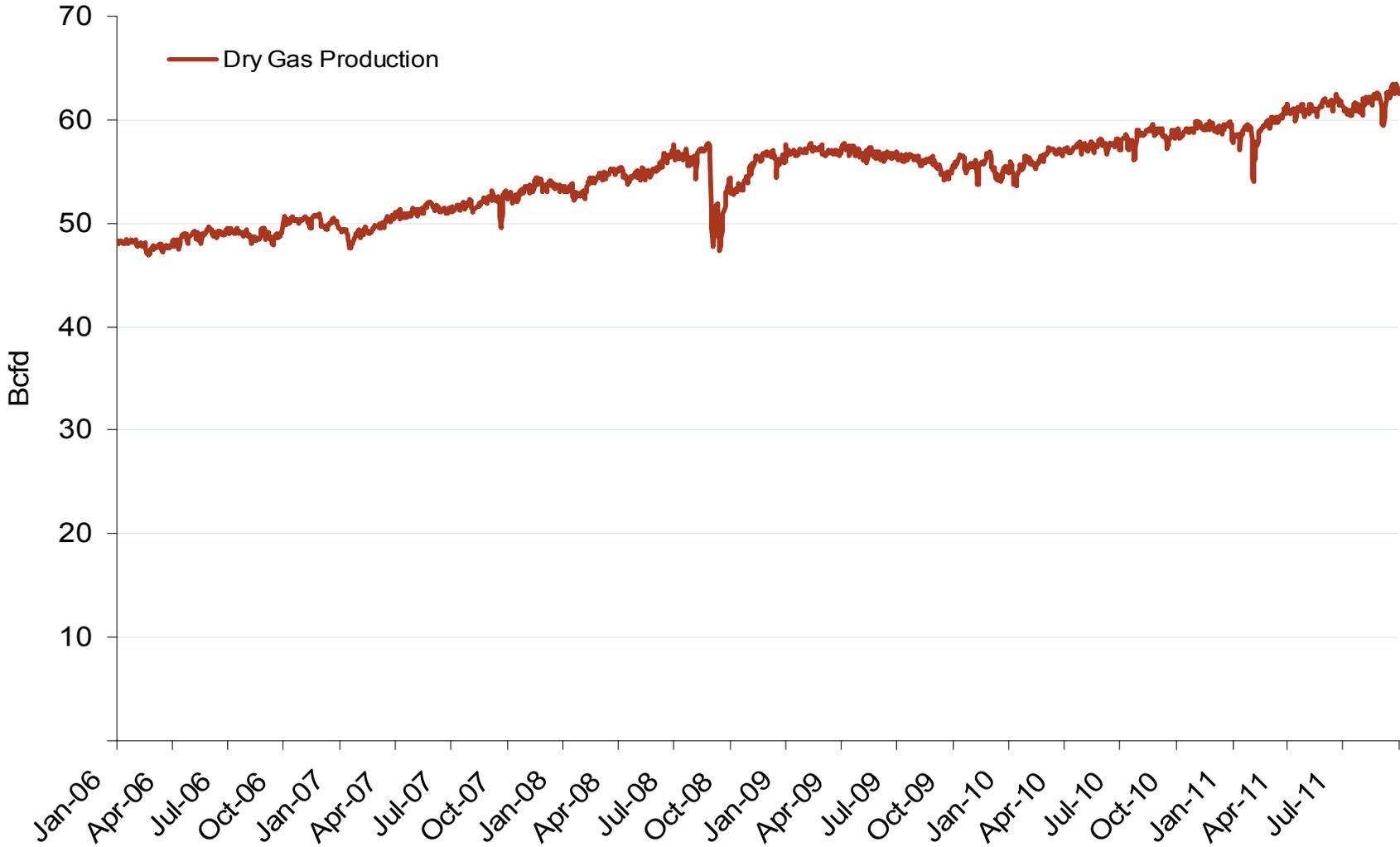
Updated: October 06, 2011

A decorative graphic consisting of several thick, parallel red lines. A vertical line runs down the left side of the page, and a horizontal line runs across the middle. They intersect to form a cross-like shape. The lines have a slight blur or glow effect.

Natural Gas and Fuel Markets

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



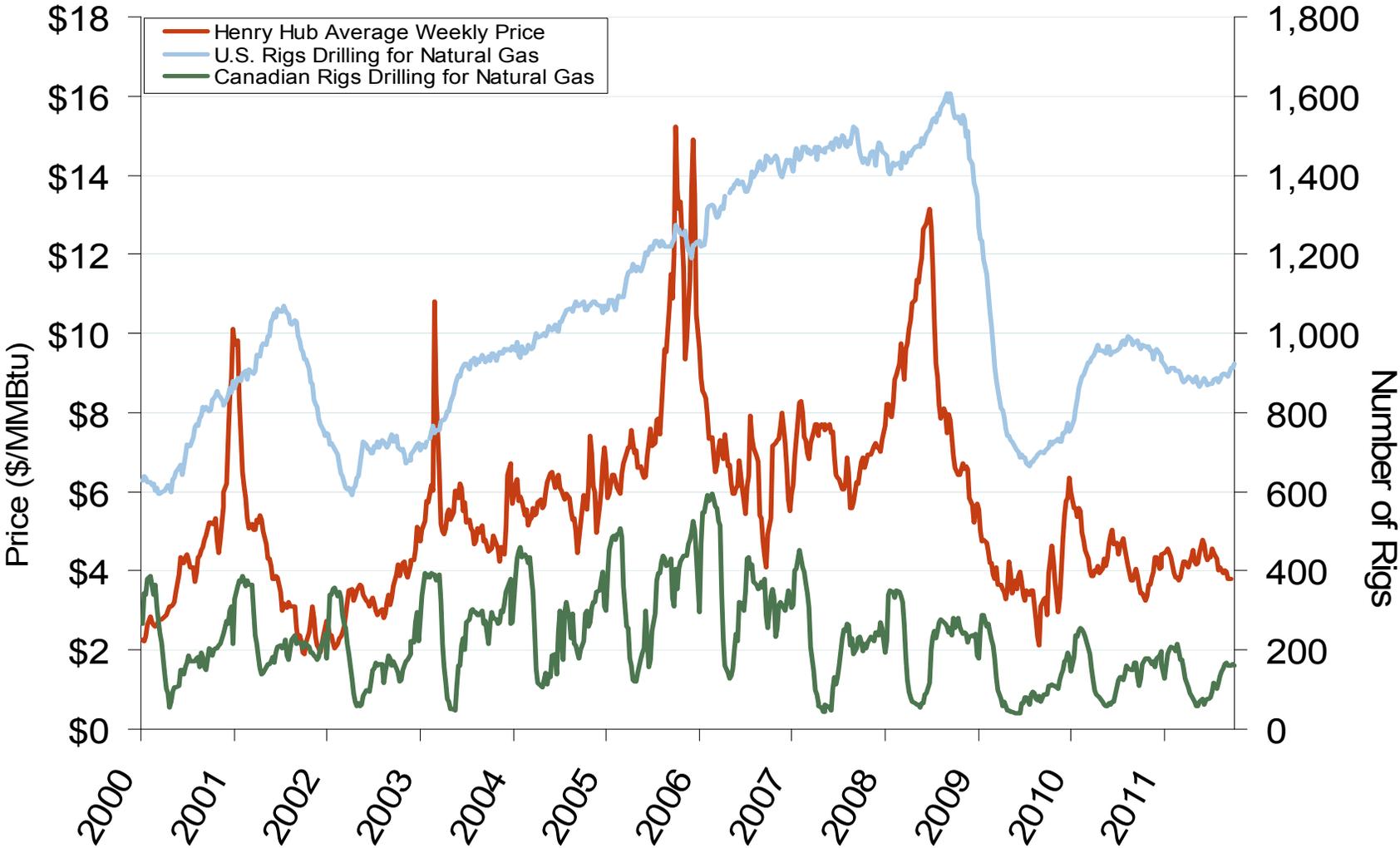
Note: Prior to July 2010, chart was derived from a combination of EIA and Bentek Energy data

Source: Derived from Bentek Energy data

October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

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



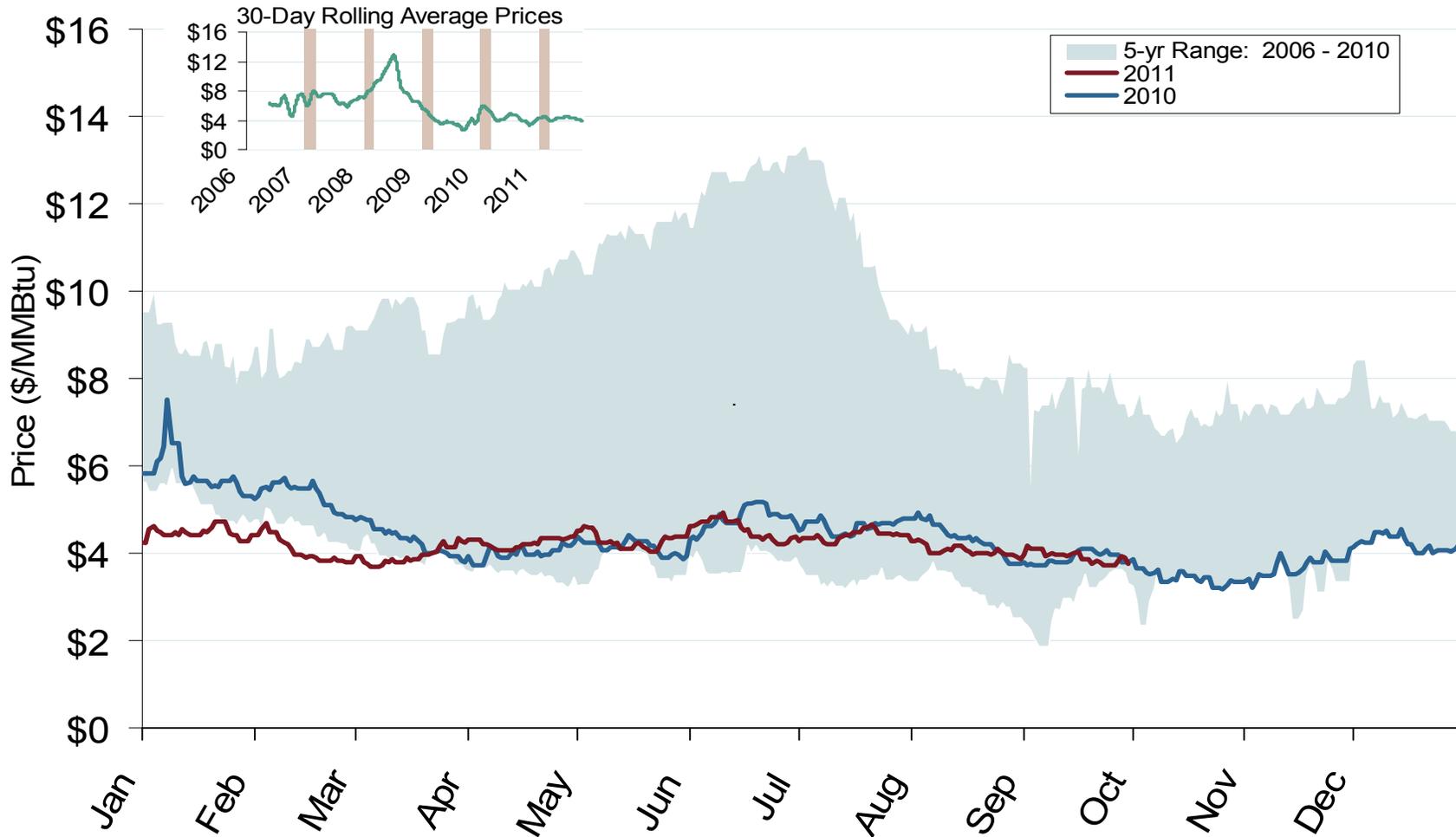
Source: Derived from *Platts* and *Baker Hughes* data
October 2011 Mid-Atlantic Snapshot

Updated: October 04, 2011

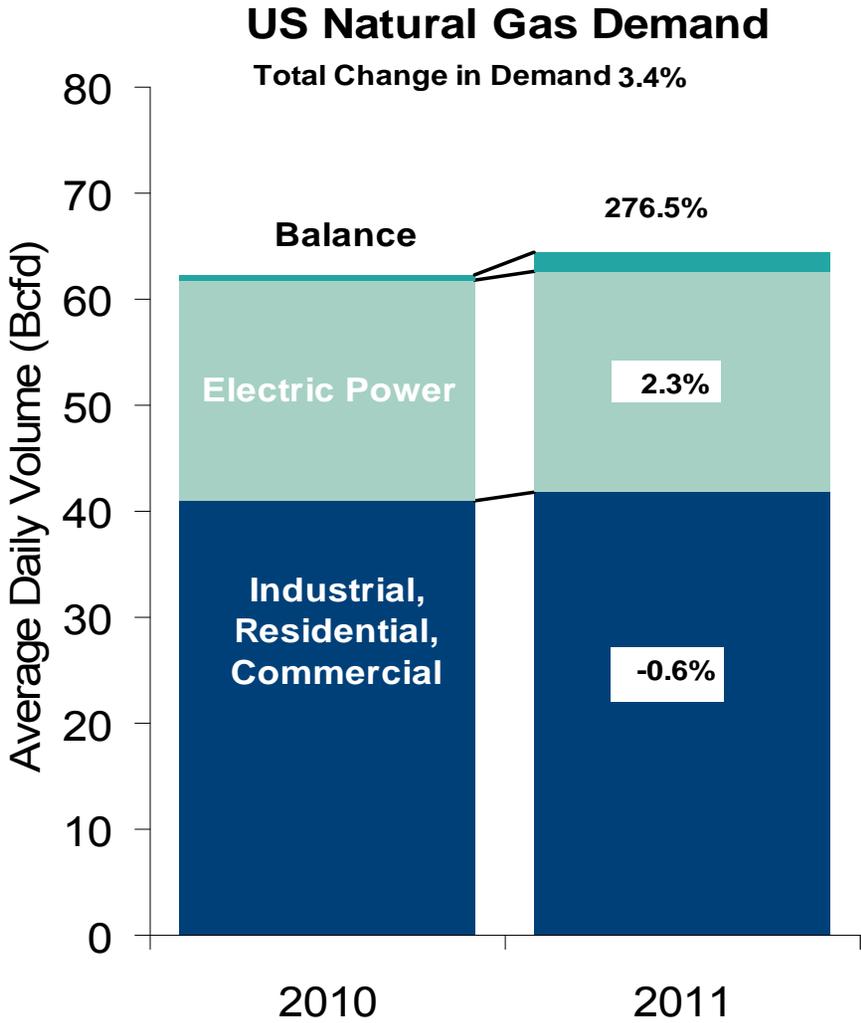
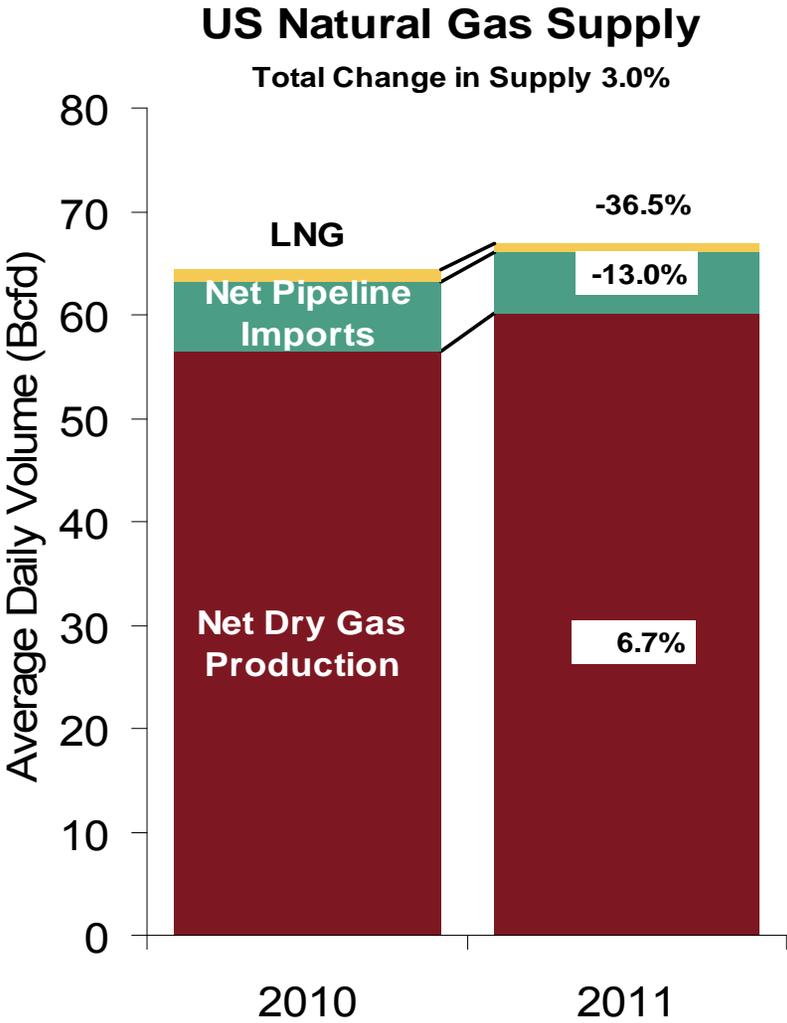
Natural Gas Market Overview: 5 Year Range of Henry Hub Spot Prices

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Henry Hub Natural Gas Daily Spot Prices



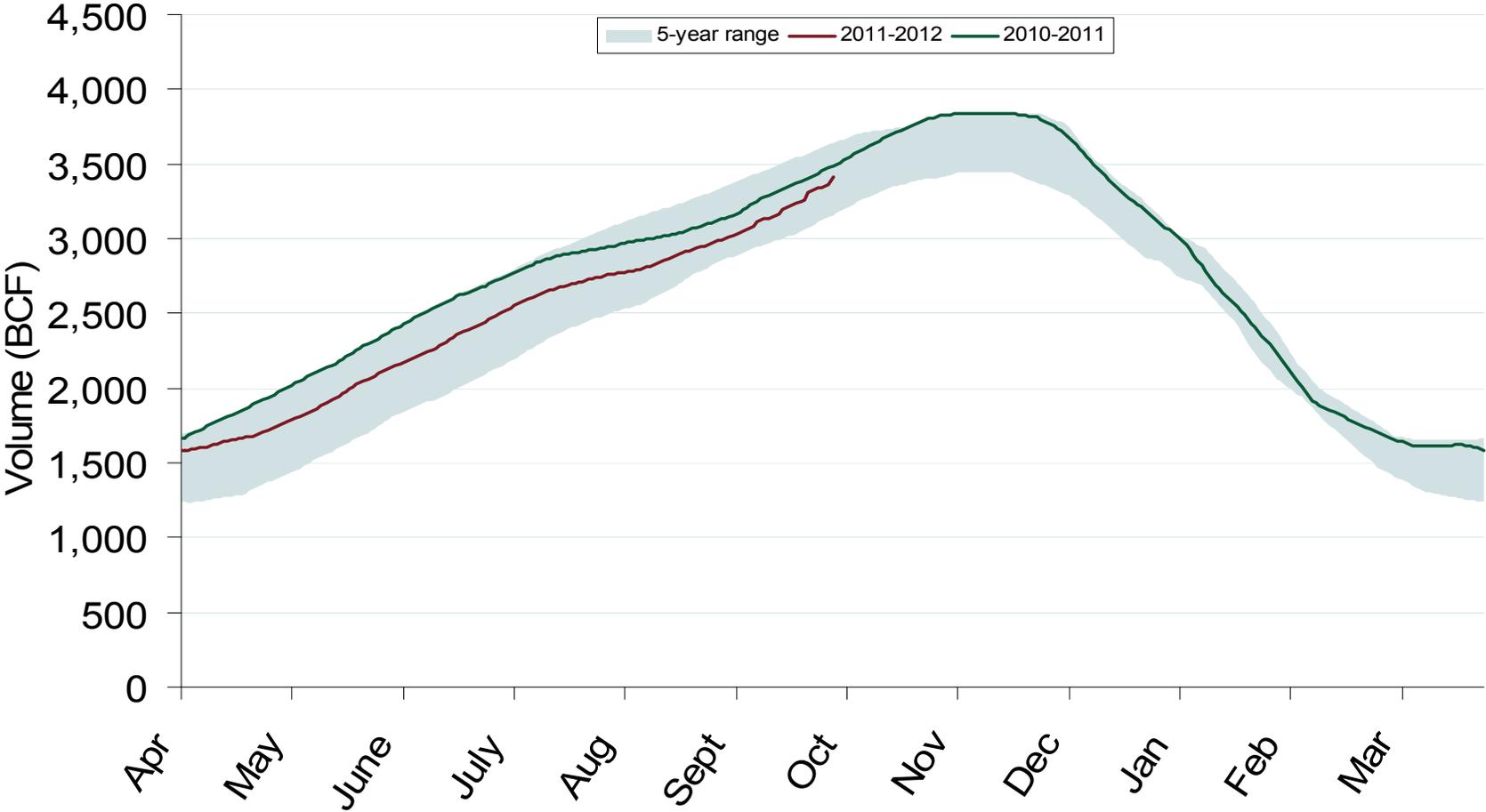
U.S. NG Supply and Demand 2010 vs. 2011: January - September



Source: Derived from Bentek Energy data
October 2011 Mid-Atlantic Snapshot

Updated: October 11, 2011

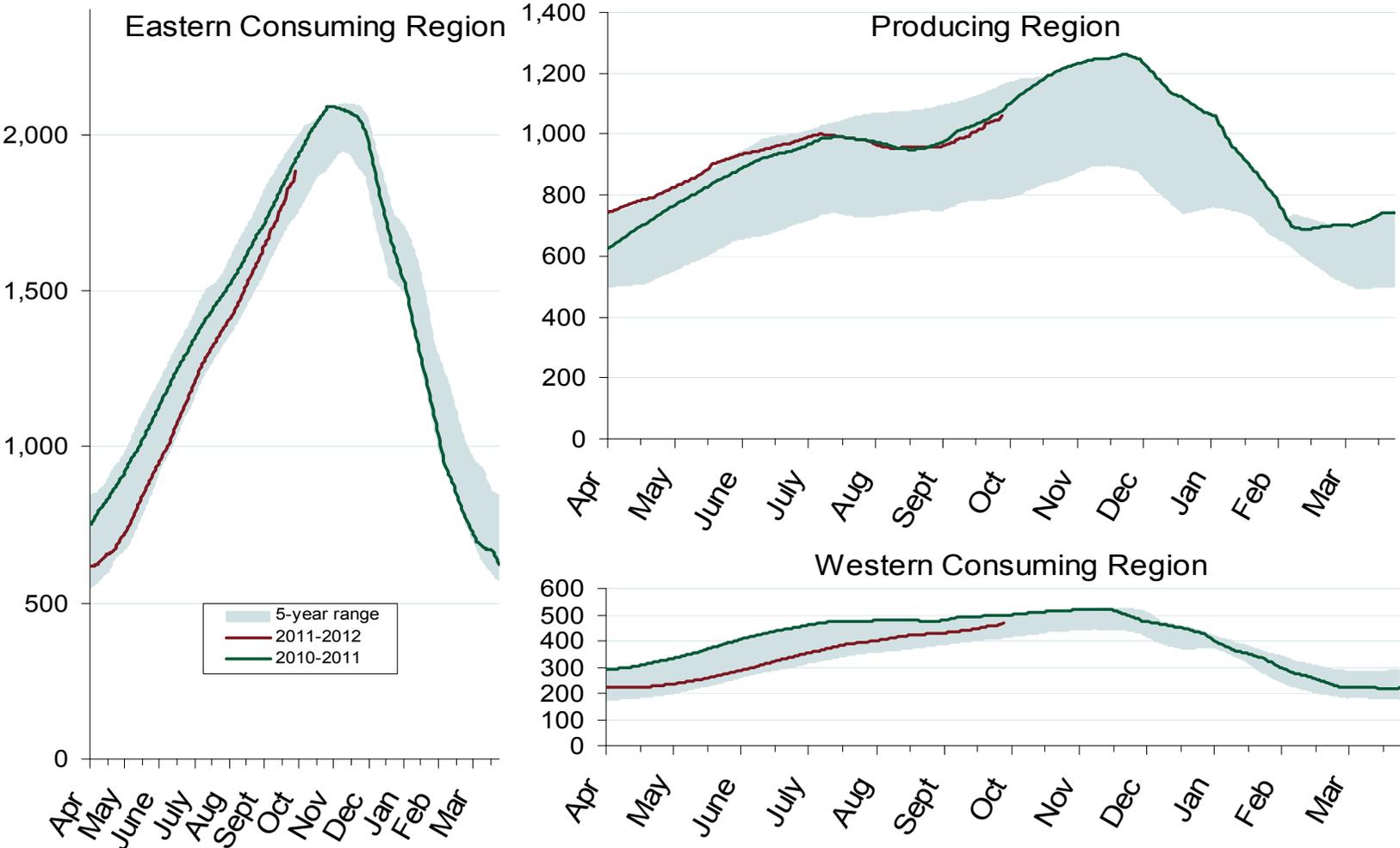
Total U.S. Working Gas in Storage



Source: Derived from EIA data
October 2011 Mid-Atlantic Snapshot

Updated: October 06, 2011

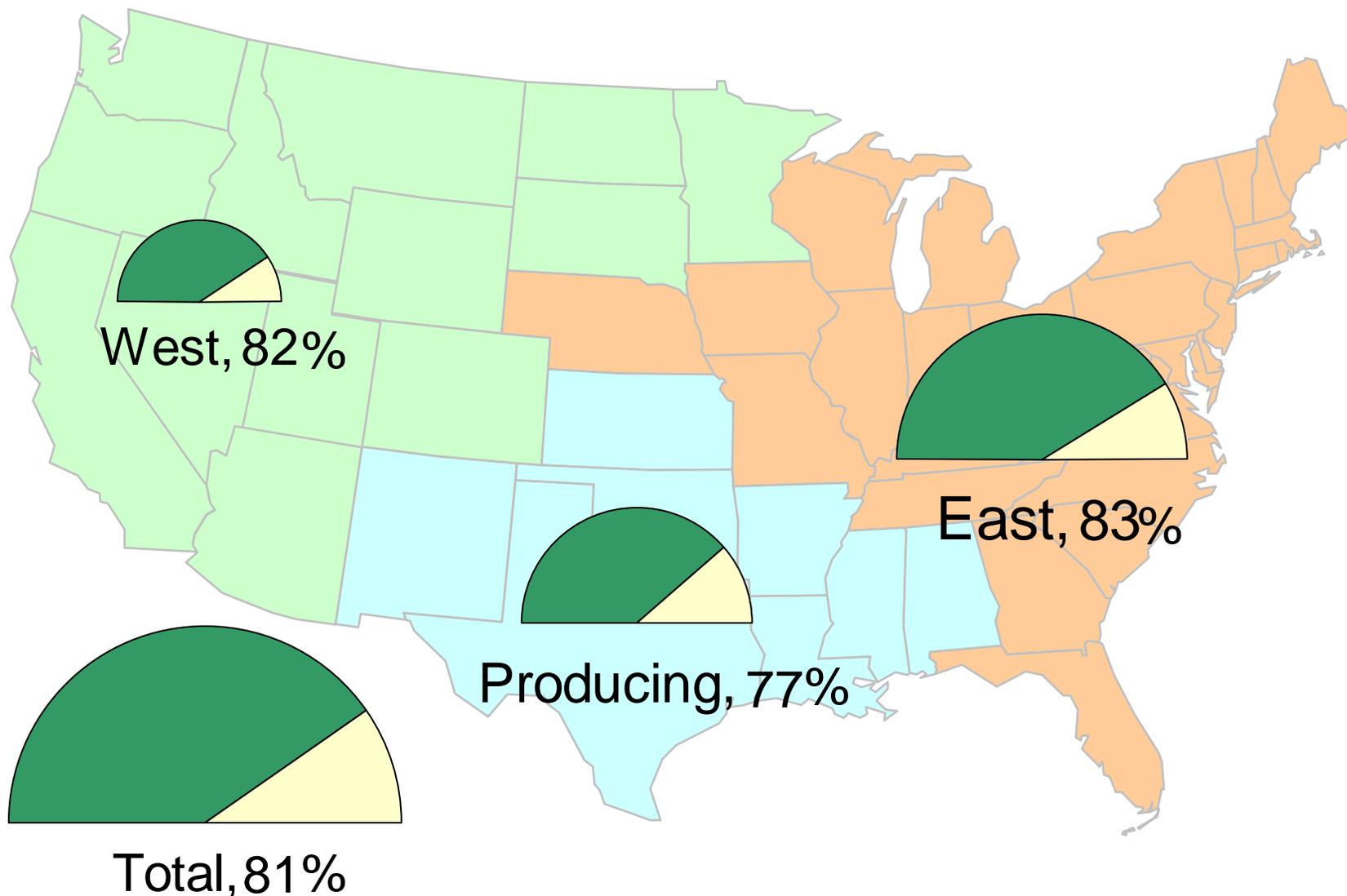
Regional Totals of Working Gas in Storage



Source: Derived from EIA data
October 2011 Mid-Atlantic Snapshot

Updated: October 06, 2011

Natural Gas Storage Inventories – September 23, 2011



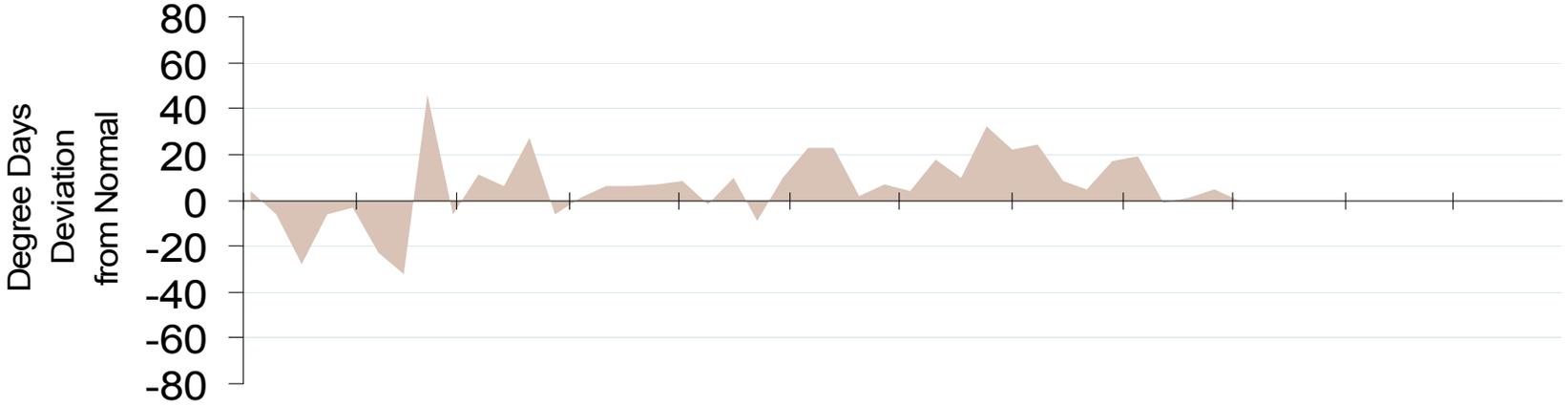
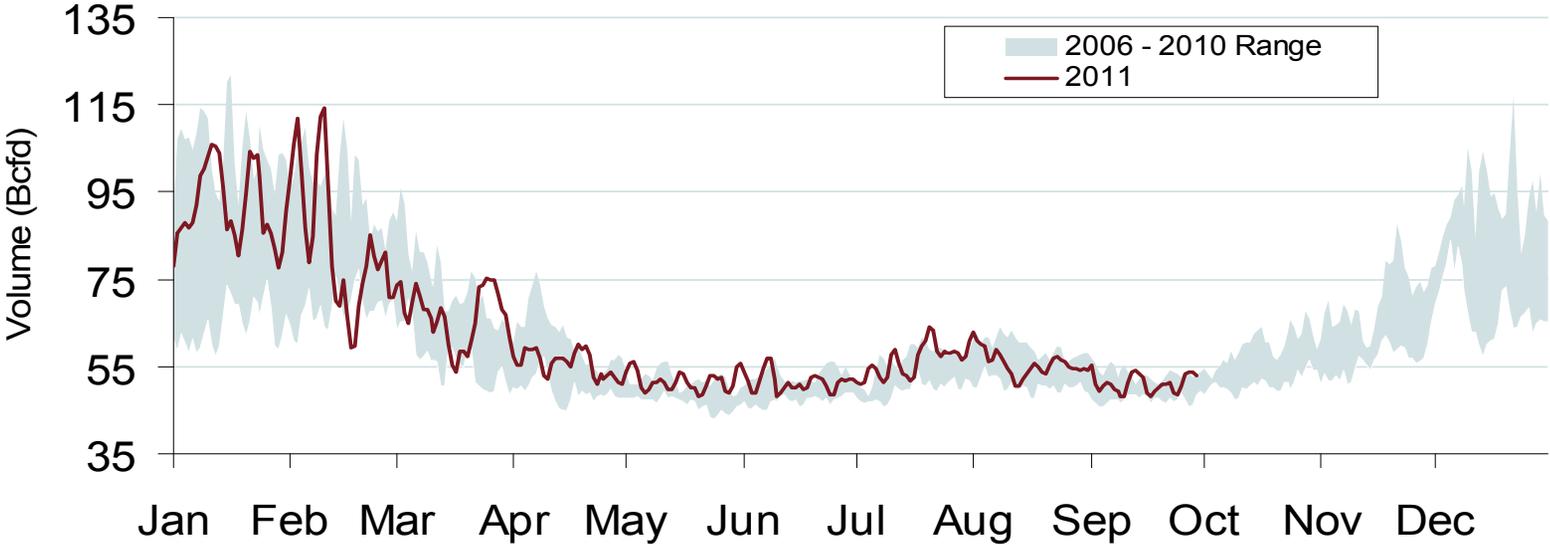
Source: Derived from *EIA Storage* and *Estimated Working Gas Capacity* data

October 2011 Mid-Atlantic Snapshot

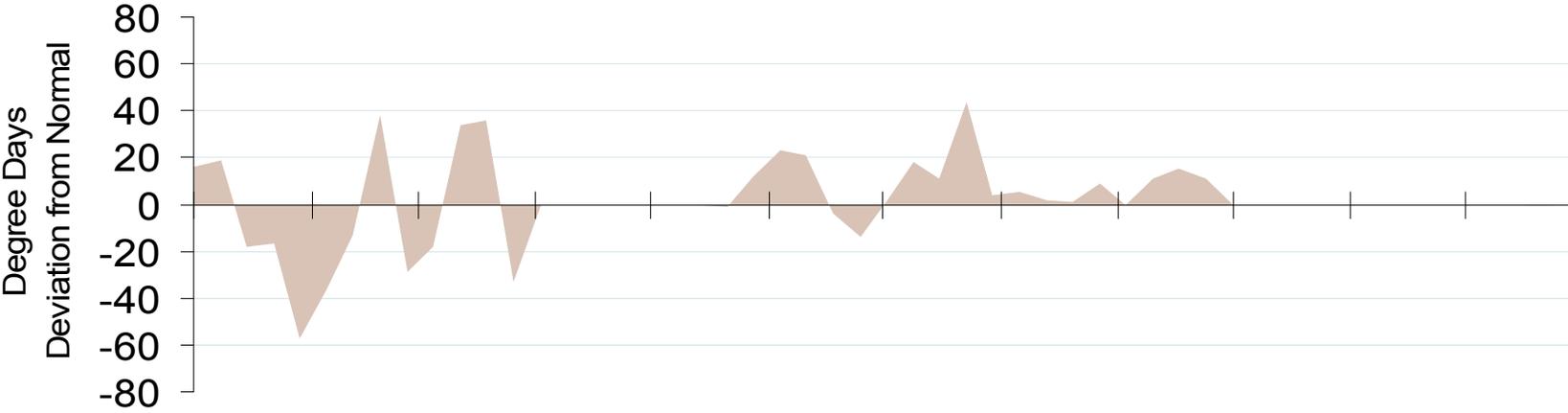
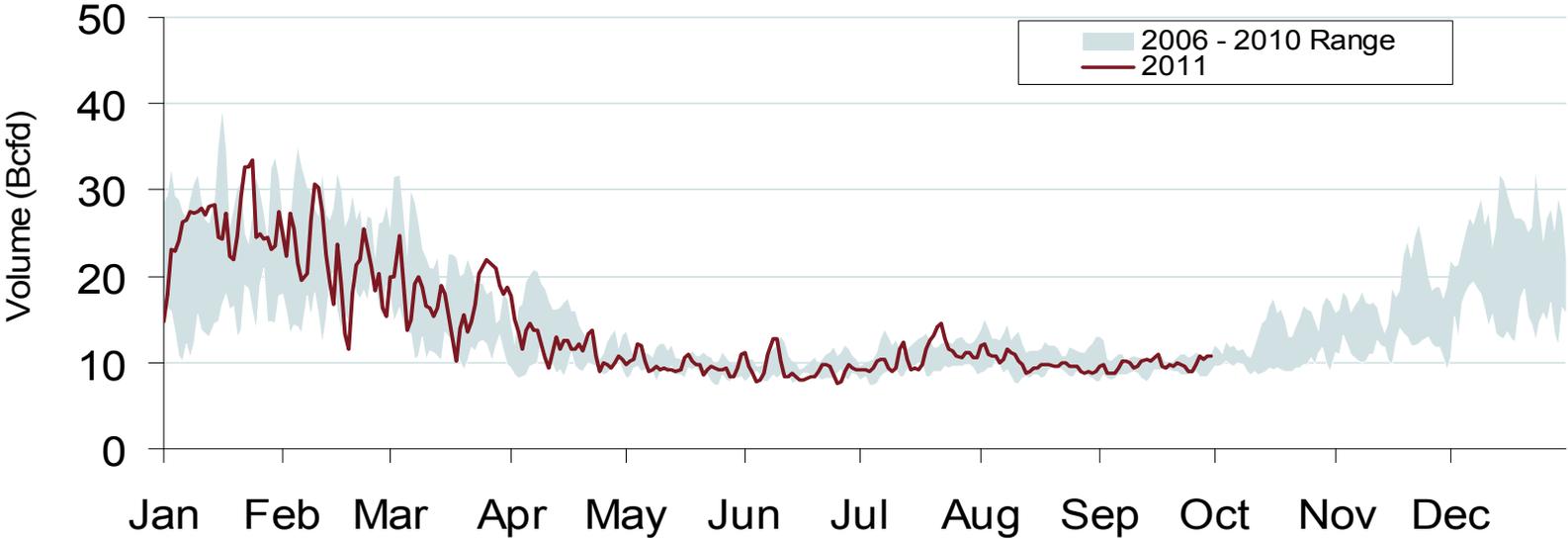
Updated October 4, 2011

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



Daily Northeast Natural Gas Demand All Sectors

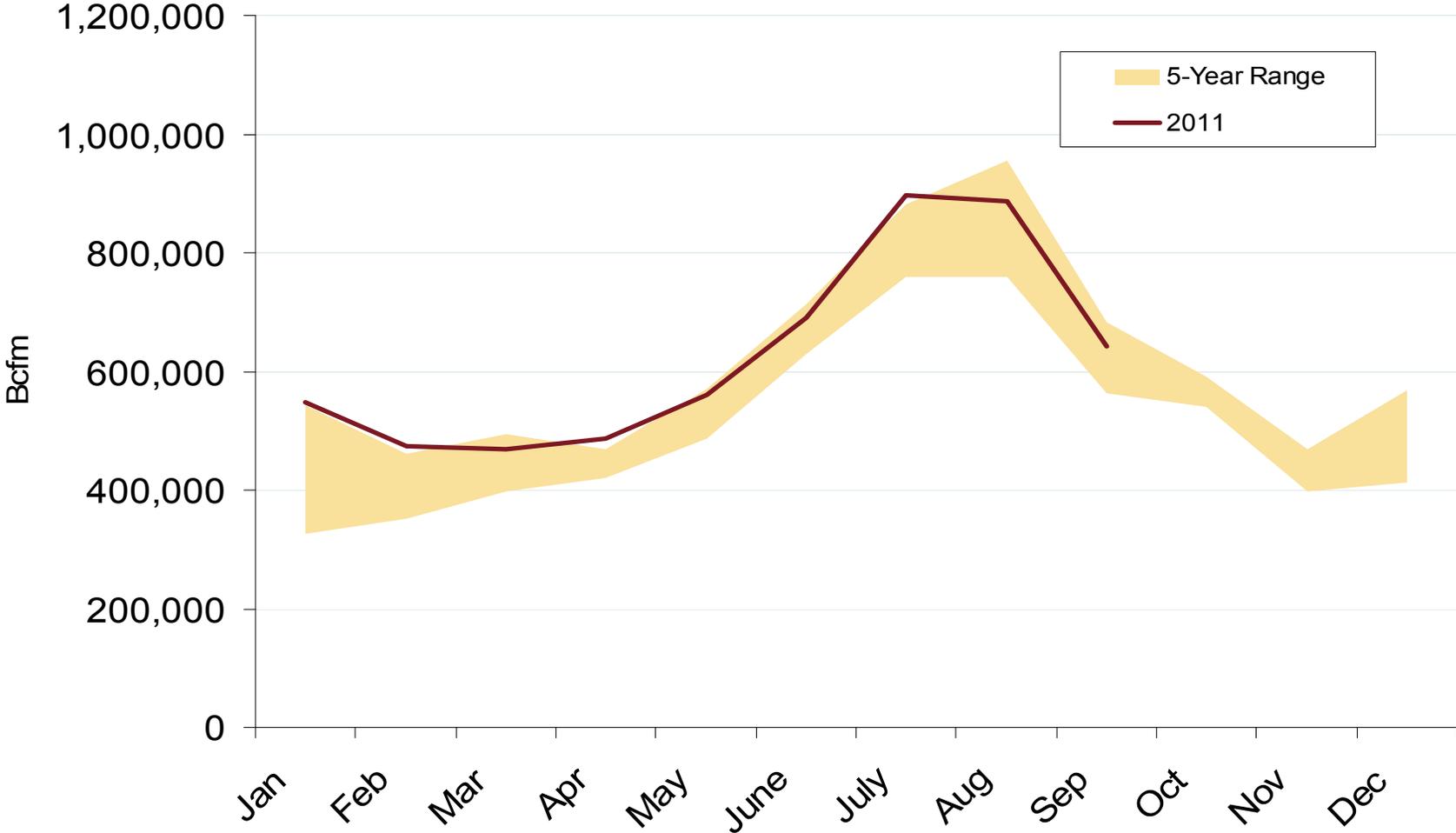


Source: Derived from *Bentek Energy* and Weekly NOAA data
October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

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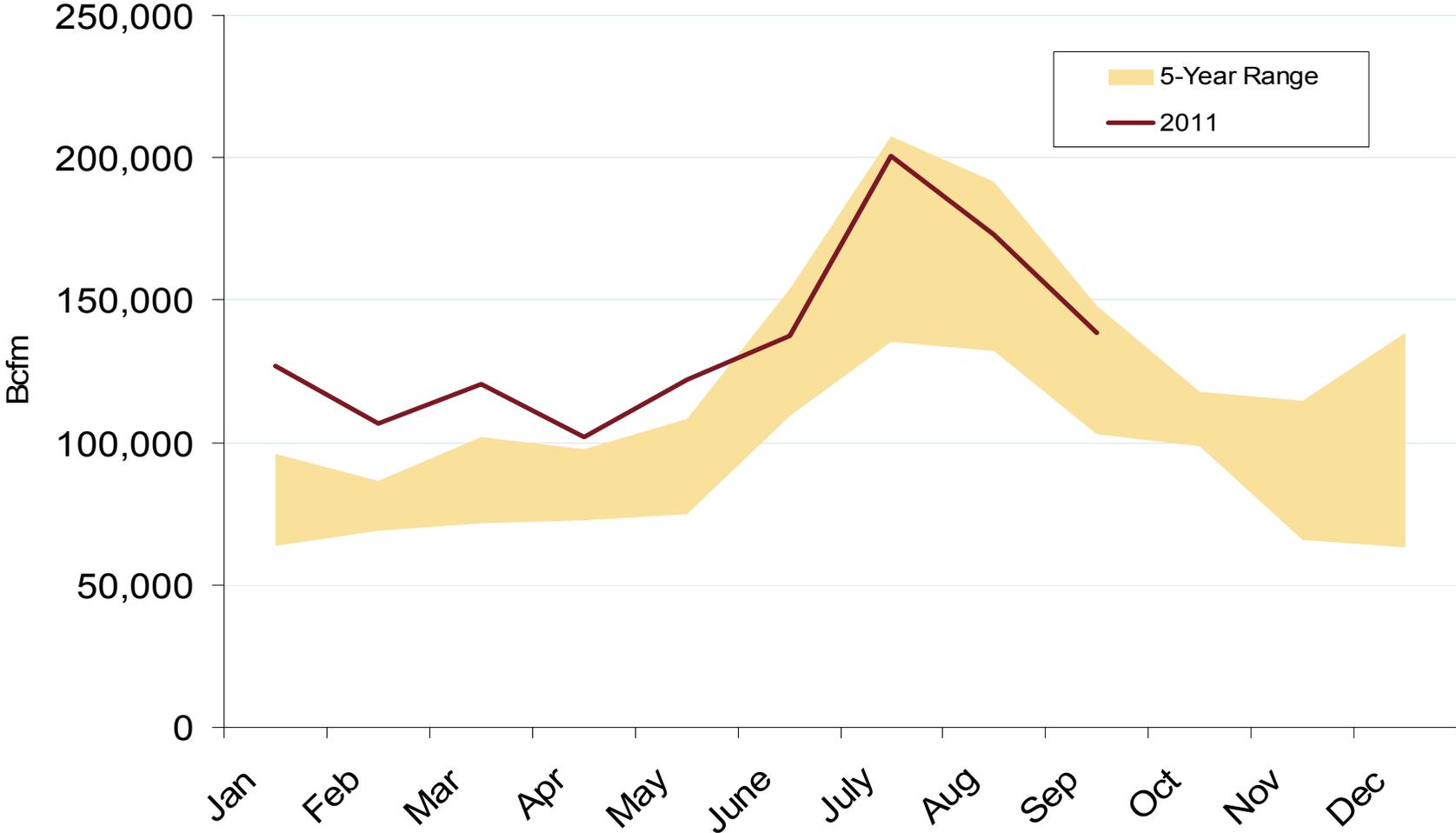
U.S. Natural Gas Consumption for Power Generation



Source: Derived from *Bentek Energy* data
October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

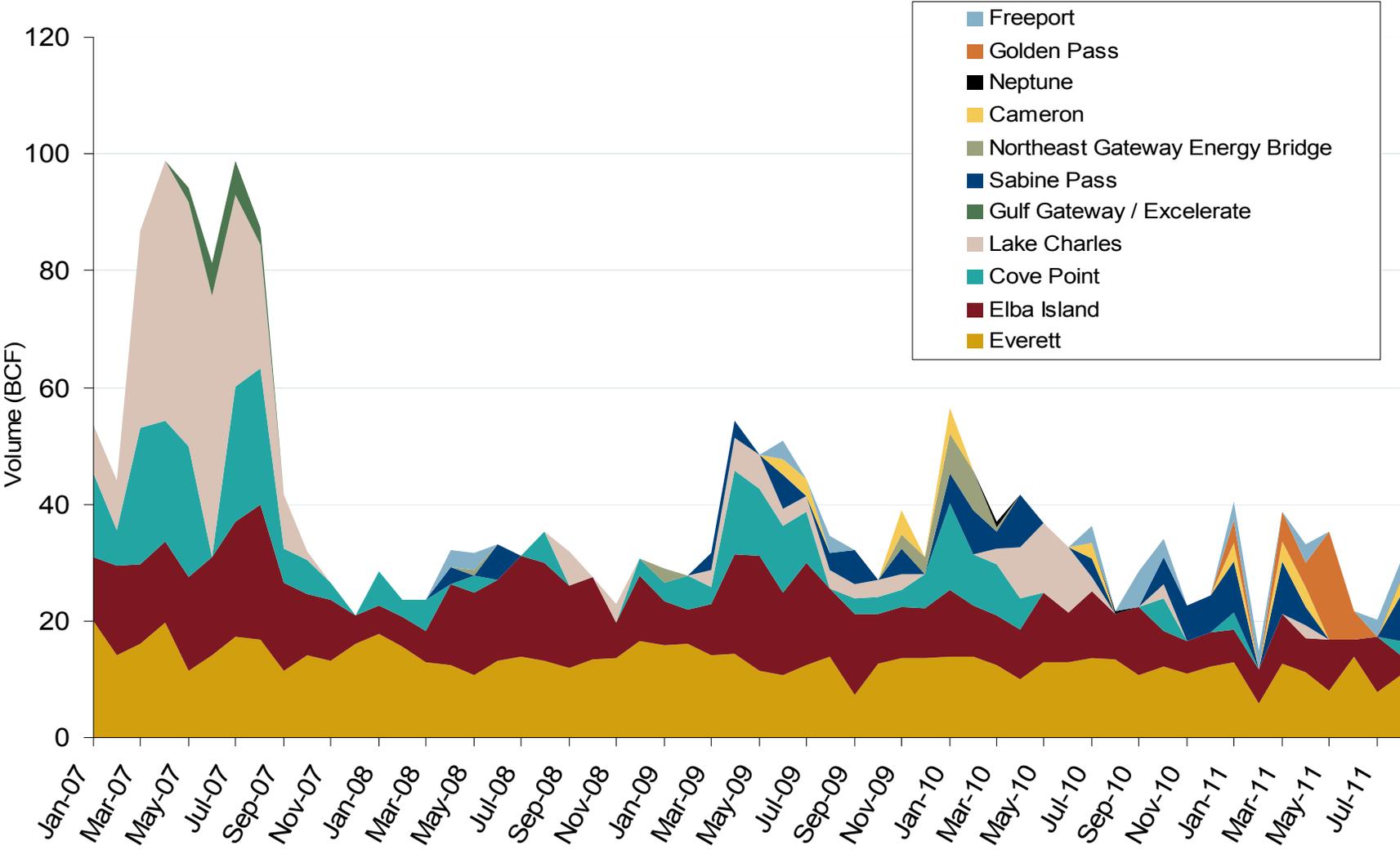
Northeast Natural Gas Consumption for Power Generation



Source: Derived from *Bentek Energy* data
October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

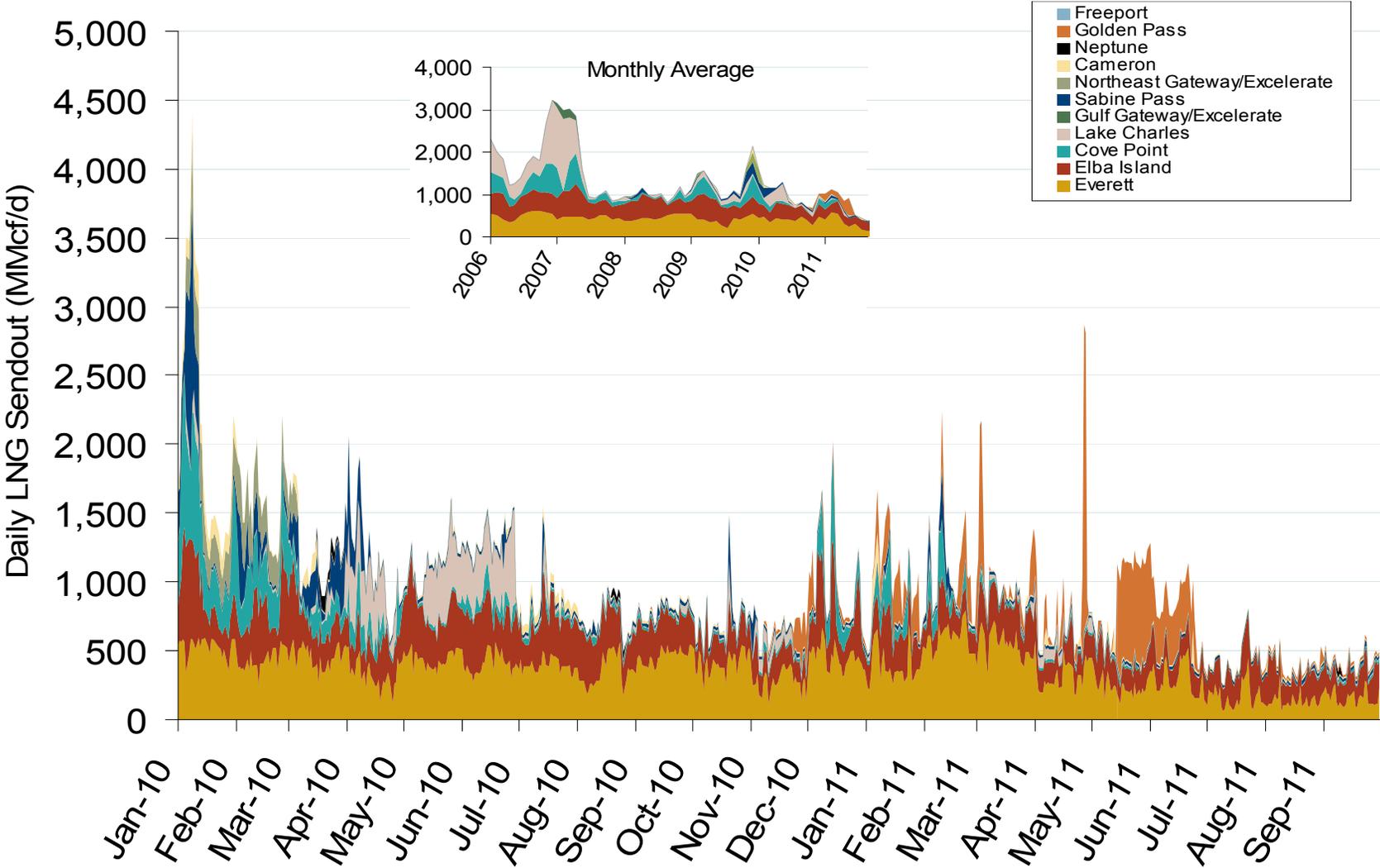
Monthly Gas Imports at Existing U.S. LNG Facilities



Source: Derived from DOE Office of Fossil Energy data
October 2011 Mid-Atlantic Snapshot

Updated: October 04, 2011

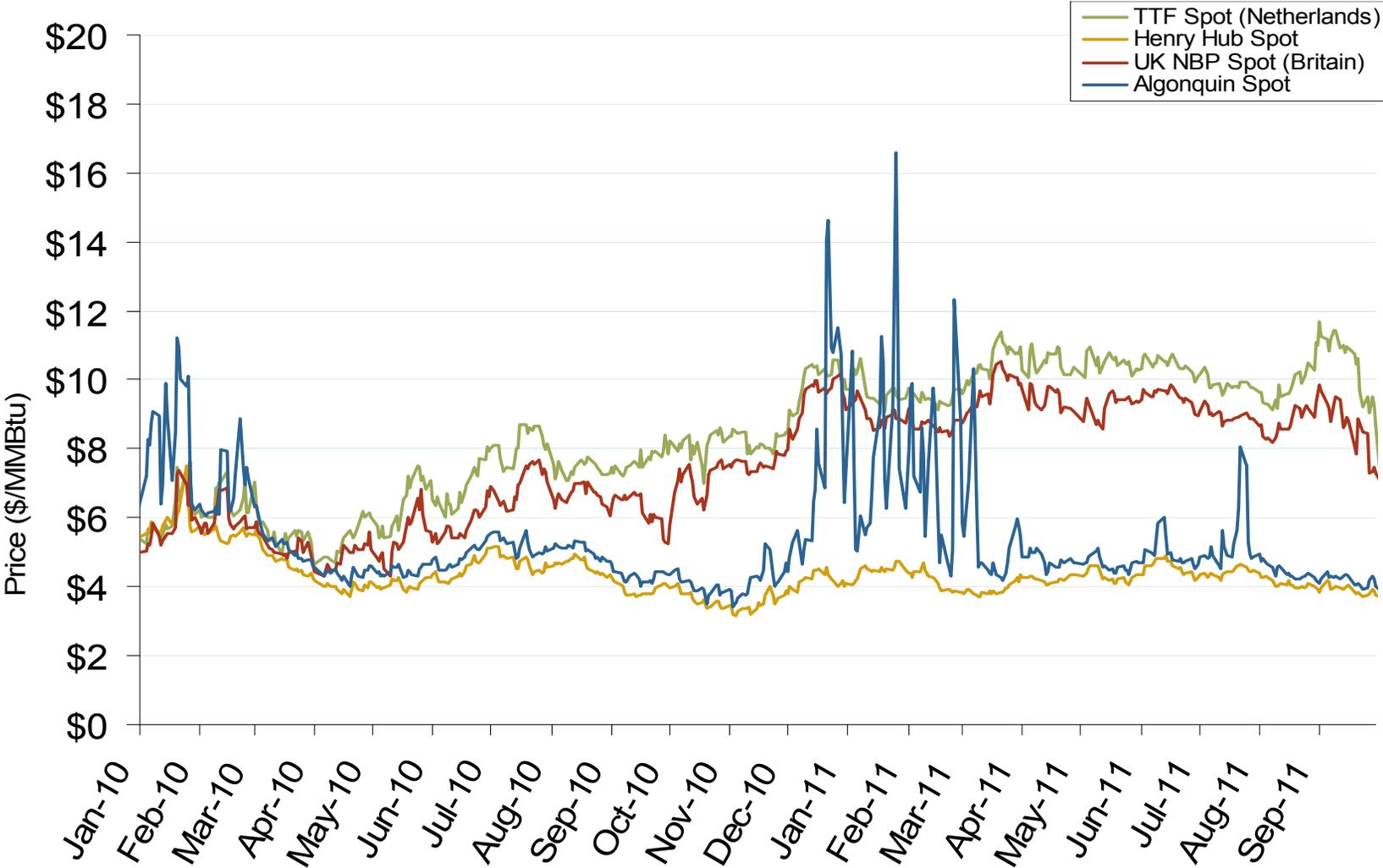
Daily Gas Sendout from Existing LNG Facilities



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 data

Atlantic Basin European and US Spot Natural Gas Prices



Source: Derived from *Bloomberg* and *ICE* data
October 2011 Mid-Atlantic Snapshot

Updated: October 05, 2011

World LNG Estimated November 2011 Landed Prices

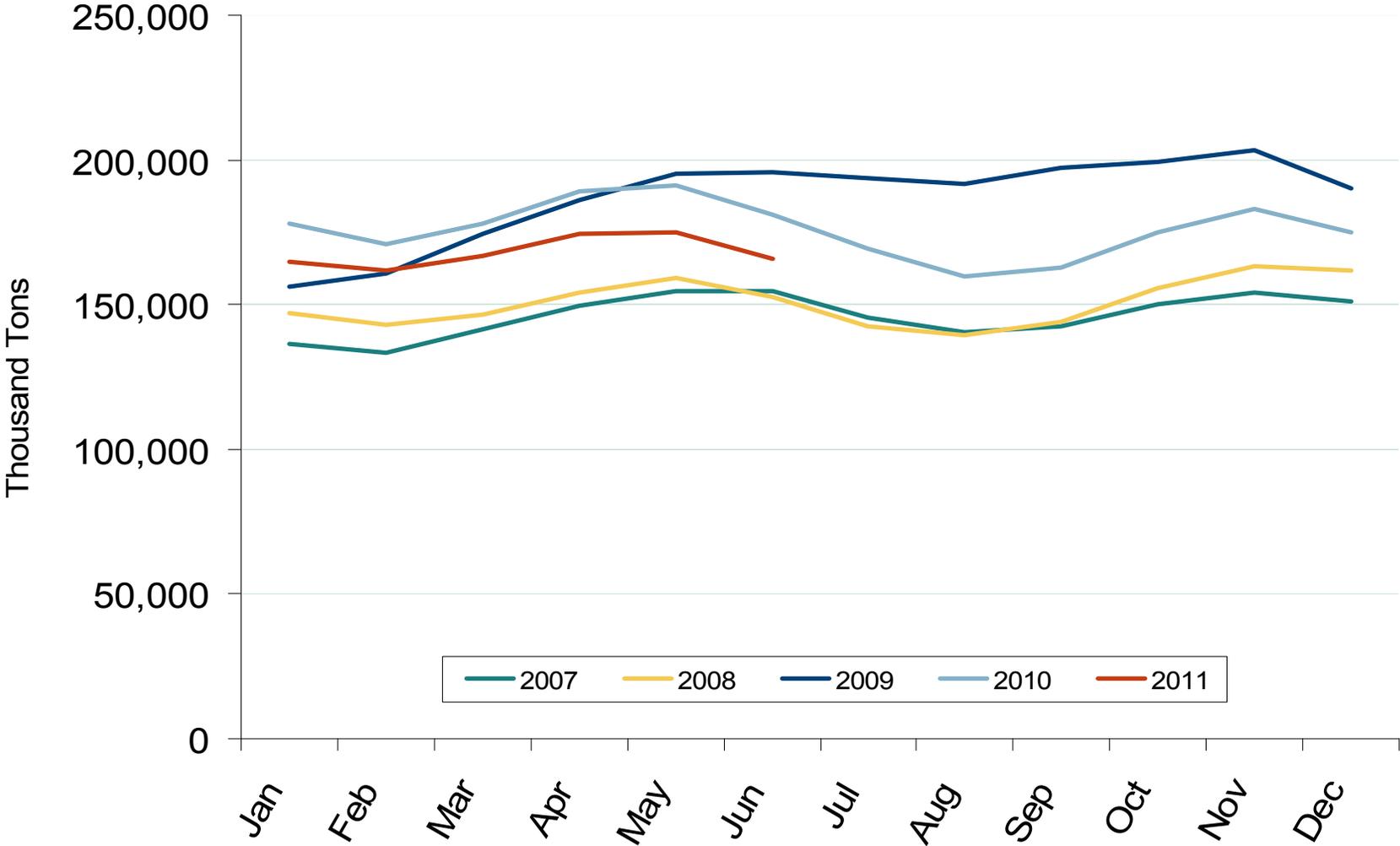


Source: Waterborne Energy, Inc. Data in \$US/MMBtu
October 2011 Mid-Atlantic Snapshot

Updated October 4, 2011
3024

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U.S. Coal Stockpiles at Electric Power Generating Facilities



Source: Derived from EIA data. Excludes Industrial and Commercial Plants
October 2011 Mid-Atlantic Snapshot

Updated: October 04, 2011