

# 2023 Summer NATURAL GAS OUTLOOK

**Editor's Note:** The US Federal Energy Regulatory Commission (FERC) has published its latest US Energy Market Assessments and the Office of Energy Policy and Regulatory Affairs' Summer Energy Outlook (Summer Assessment). This report provides an outlook for US energy markets and energy infrastructure through 2023. What follows is an executive summary. The full document can be found online by visiting the GOM Resource Center at [www.gasscompressionmagazine.com](http://www.gasscompressionmagazine.com).

**N**atural gas prices are currently expected to rise in the second half of 2023, as market demand 2023 shows signs of recovery from the tight supply-demand market seen in 2022. According to the US Energy Information Administration's (EIA) Short-Term Energy Outlook (STEO), domestic natural gas demand in 2023 is expected to exceed 100 Bcf/d (2022: 98.6 Bcf/d), driven by growth in residential and commercial natural gas demand as well as growth in natural gas exports. Natural gas imports are expected to be 3.5% above the historical average, and the lower imports relative to the average is contributing to lower summer futures prices.

**NATURAL GAS PRICES**  
Natural gas prices this summer are expected to be lower than last summer, as projected by the latest US Energy Outlook (EO) for 2023 (see Figure 1). The main gas futures price for 2023 is \$3.25/MMBtu, down from \$3.53/MMBtu in 2022, and September 2023 price components are off 11% to \$3.23/MMBtu. The Henry Hub futures price is projected to average \$3.21/MMBtu during the summer, down from \$3.45/MMBtu in 2022. Henry Hub futures prices have generally declined over the past year, driven largely by a reduced need to meet natural gas load storage given abundant supplies. Higher natural gas production, including the trading hubs' location in Louisiana, as well as increasing compression costs due to the combination of weaker demand and electric power sector demand, which would put downward pressure on prices.

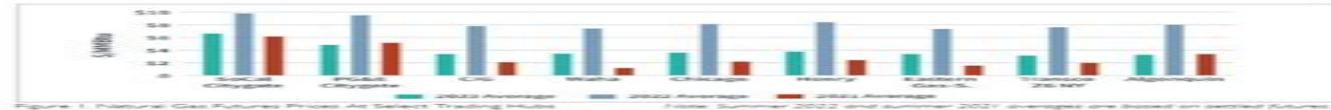


Figure 1. Natural Gas Futures Prices At Select Trading Hubs  
Source: InterContinental Exchange

gascompressionmagazine.com | JULY 2023

Year	Production (Bcf/d)
2018	85.0
2019	93.2
2020	94.4
2021	94.9
2022	100.1

Natural gas futures contracts at US trading hubs may trade at a premium or discount depending on the dynamics between basis and pipeline transportation rates. Trading hubs with higher pipeline transportation rates, such as Henry Hub, reflect the cost of pipeline transportation to the destination. In recent years, natural gas futures prices at Henry Hub, typically indicate trading hubs with more robust commodity markets, such as those causing high demand and large price increases, the availability of pipeline capacity to move natural gas.

The Henry Hub summer 2023 futures price is trading at an average of US\$3.21/MMBtu, while Cushing trading is trading at US\$3.21/MMBtu, above the Henry

Figure 2. US Summer Natural Gas Production Data Source: EIA

Mkt., a 10% premium relative to the 2022 basis of US\$3.140/MMBtu. This premium, because of lower year-over-year prices at the Henry Hub, is 32.3% lower than the summer 2022 price of US\$3.98/MMBtu, which reflects the impact of lower natural gas prices on the power sector. The basis shift reflects, in part, local natural gas storage inventories at the Waha trading hub, a potential price restraints, the proximity to Henry Hub, and the Henry Hub futures price.

At the Waha trading hub, a potential price restraints, the proximity to Henry Hub, and the Henry Hub futures price, futures prices for this month are trading at an average US\$3.24/MMBtu. Futures prices at Waha reflect US\$0.23/MMBtu below the Henry Hub. Over the past year, the Waha futures price has reflected a significant capacity for natural gas production and related with crude oil production. This capacity has been reported out of the basin to market hubs, and then results in significant price differentials across the basins relative to the Henry Hub price.

**NATURAL GAS PRODUCTION**  
As shown in Figure 2, the EIA forecasts natural gas production will increase by 0.9% from the summer 2022 average of 99.2 Bcf/d (2,839 Tcf) to 100.1 Bcf/d (2,858 Tcf) in 2023. Dry natural gas production increased by 10.4% in 2020 due to the economic impacts of the COVID-19 pandemic. After declining by 10.3% in 2021, dry natural gas production exceeded 10% in 2018 and 2019 prior to the COVID-19 pandemic, growing an average of 4.6% annually from 2010 to 2019, as reported on page 46.

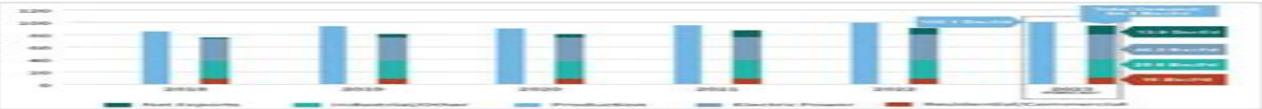


Figure 2. US Summer Natural Gas Production Data Source: EIA

last summer, and forecasted for this summer averages about 2.6% per year. Declines in natural gas production growth have generally been attributed to capital expenditures exercised by oil and gas producers in connection with industry-wide drilling slowdowns, exploration, service sector constraints, and lower natural gas prices.

**NATURAL GAS DEMAND**  
Residential/commercial, industrial/natural gas consumed for electricity generation, and natural gas consumed for residential/commercial, industrial/natural gas consumed for electricity generation are projected to average 10.5 Bcf/d in 2023, up 4.4% more than summer 2022 levels and 14% more than the previous five-year average. In comparison with previous summers, the increase in natural gas demand for residential/commercial, industrial/natural gas consumed for electricity generation is 1.0% greater than the previous five-year average (2018–2022), up 36.9% from summer 2022 Bcf/d and up 10.4% from the previous five-year average. Total US electricity imports are projected to average 80.2 Bcf/d (2,271 × 10<sup>9</sup> m<sup>3</sup>/yr) in 2023, up 3.3% from summer 2022 levels and a 5.9% increase from the previous five-year average.

The growth in US natural gas net exports has recently been driven by LNG exports. Domestically, the biggest increase

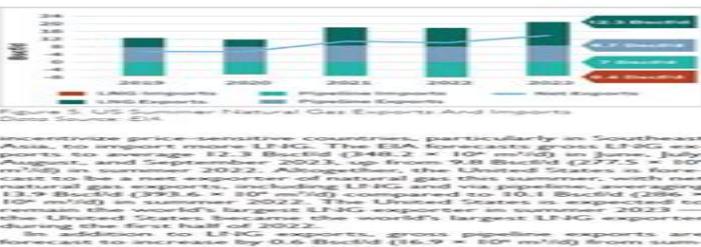
in natural gas demand in summer 2023 is expected to come from residential/commercial, industrial/natural gas consumed for electricity generation, up 1.0% from the previous five-year average. Residential/commercial, industrial/natural gas consumed for electricity generation, which is primarily concentrated on the Gulf Coast due to the region's proximity to the major industrial centers, is up 2.5% from the previous five-year average.

Power burn in 2023 is down 2.8% from summer 2022 levels and up 4.7% from the previous five-year average. Consumption levels peak during the highest months of July and August, at around 44 Bcf/d (1,240 × 10<sup>9</sup> m<sup>3</sup>/yr). The peak in power burn is driven by high demand for electricity and average 37 Bcf/d (1,047 × 10<sup>9</sup> m<sup>3</sup>/yr).

The demand for electricity, which is driven in summer by high demand for space cooling and the share of electricity generation that utilizes compressed natural gas, continues to grow. During summer 2023, the share of US natural gas-fired electricity generation output is forecast to average 42.4%, down slightly from 43.6% in 2022. The upturn in other power and coal-fired generation are forecast to provide the majority of electricity generation, with the share of coal-fired generation in 2023 being lower than last year's 43.6% share. This reduction in coal-fired electricity generation share in summer 2023 is forecast to be partly offset by increases in the share of generation from natural gas and renewable energy resources producing a net reduction in total US generation compared to summer 2022.

**NATURAL GAS EXPORTS AND IMPORTS**  
Natural gas exports are expected to increase this summer, due primarily to heightened international LNG demand and the EIA's expectation of reduced imports (see Figure 3). International LNG demand is expected to be largely driven by European buyers, as they continue to import imported LNG.

In addition, reduced LNG prices in 2023 due to a mild winter andathermogenic natural gas storage withdrawals could



rise. For context, gross pipeline exports averaged 5.9 Bcf/d (167 × 10<sup>9</sup> m<sup>3</sup>/yr) to 2.2 Bcf/d (63.2 × 10<sup>9</sup> m<sup>3</sup>/yr) in 2022. Pipeline exports have increased over the past few years to allow it to meet the needs of the market. The Blue Express project will further increase pipeline exports by approximately 0.5 Bcf/d (14.0 × 10<sup>9</sup> m<sup>3</sup>/yr) when it goes into service this year. In contrast, the EIA expects gross pipeline imports to increase from 2022 to an average of 199.2 × 10<sup>9</sup> m<sup>3</sup>/yr in 2023, a 0.8% (1.6 × 10<sup>9</sup> m<sup>3</sup>/yr) year-over-year decrease.

**NATURAL GAS STORAGE**  
Natural gas storage facilities help to balance natural gas demand and supply and are fundamental to price formation. Held without withdrawal in 2022, 2023 is expected to add 103 Bcf (35.1 × 10<sup>9</sup> m<sup>3</sup>), which is 32% (44.8 Bcf [112.48 × 10<sup>9</sup> m<sup>3</sup>]) more than the average of the last five years (2018–2022: 29.9 Bcf [9.31 × 10<sup>9</sup> m<sup>3</sup>]), more than the average at the start of the last five years (2013–2017: 27.1 Bcf [7.33 × 10<sup>9</sup> m<sup>3</sup>]). Natural gas storage inventories are forecast to grow by 19.2 Bcf (54.0 × 10<sup>9</sup> m<sup>3</sup>) during the 2023 injection season. After the completion of the 2023 injection season, natural gas storage inventories at the start of the next five-year withdrawal season will be 336.2 Bcf (10.45 × 10<sup>9</sup> m<sup>3</sup>), 30% (11.88 Bcf [3.34 × 10<sup>9</sup> m<sup>3</sup>]) above the five-year average start of the last five winter storage withdrawn seasons. □

# Outlook For Natural Gas A Quality Fuel

**United States. Department of Energy**

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[Directory of Energy Data Collection Forms ,1990](#)      **EIA Publications Directory ,**      **The Outlook for Natural Gas ,1992**      **Annual Report to Congress** United States. Department of Energy,1984      **Annual Report to Congress** United States. Energy Information Administration,1991      [Energy Abstracts for Policy Analysis ,1989](#)      **The Cumulative Book Index ,1973** A world list of books in the English language      **Library of Congress Catalog** Library of Congress,1970

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