

Winter's Mide: The U.S. Federal Energy Regulatory Commission (FERC) has published a joint report from FERC's Office of Energy Policy and Innovation's Division of Energy Market Assessments and the Office of Electric Reliability's Division of Electricity Assessment (Summer Assessment). The report provides an outlook for US winter gas demand in an appendix from that report, which focuses on the summer outlook for the US natural gas market. The report's Summer Assessment can be viewed at <http://www.ferc.gov/energy-market-assessments/summer-assessment.asp>.

are currently expected to rise in 2023. The market fundamentals have improved significantly since the end of last year, as supplied markets. According to Outlook, domestic supply will increase by 80-90 Bbl/d to 2.83B + 80 b/d for the first time, while demand is projected to reach 2.83B + 80 b/d. Demand for liquefied petroleum gas will also increase, reaching 1.6B + 80 b/d, above the historic average, which will contribute to the average in contributing to

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Notes: Summer 2022 and summer 2021 averaged are based on certified futures.

Figure 2. US Summer Natural Gas Production Data (1990-2000)

The above information was obtained from a review of the files of the Federal Bureau of Investigation, Department of Justice, and the Central Intelligence Agency, Office of Security, Washington, D.C., and is being furnished to you for your information.

Sincerely,
John Edgar Hoover
Director

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NATURAL GAS PRODUCTION
As shown in Figure 2, the ELA forecasts that 2023 total dry natural gas production will be 2,834 Bcfd (2,834 Bcf/d), an increase of 0.9% from the 2022 average of 99.2 Bcfd (2,809 Bcf/d). The 2023 average of 99.2 Bcfd (2,834 Bcf/d) is 10% greater than the 2020 average of 92.4 Bcfd (2,636 Bcf/d). Dry natural gas production in 2020 due to the economic impact of the COVID-19 pandemic. Annual average dry natural gas production growth estimates 10% in 2018 and 2019 and CAGR 1%.



last summer and forecasted for this summer averages about 2.7% per year, or close to a quarter of pre-pandemic growth. The decline in production growth has generally been attributed to capital discipline exercised by oil and gas producers, in combination with industry supply chain challenges stemming from a post-service sector constraints and lower natural gas prices.

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normalize global monthly CO₂ emissions, particularly in East Asia, to import more LNG. The EIA forecasts gross LNG exports to the U.S. will grow from 10.1 Bscfd in 2022 to 10.8 Bscfd in August, and Sept. 2023 up from 9.8 Bscfd (277.5 × 10⁶ cu ft) to 10.5 Bscfd (294.6 × 10⁶ cu ft). The U.S. is expected to be a net exporter of natural gas this summer, with net exports of 13.9 Bscfd (393.6 × 10⁶ cu ft) compared to 10.1 Bscfd (286 × 10⁶ cu ft) in summer 2022. The U.S. is also expected to be the world's largest LNG exporter in summer 2023.

In addition to LNG exports, gross pipeline exports are forecast to increase by 0.6 Bscfd (16.9 × 10⁶ m³/d) from summer 2022 and average 8.7 Bscfd (246.3 × 10⁶ m³/d); this sum-

natural gas demand in summer 2023 is expected to come from the petrochemical and chemical sector, which is expected to grow 1.5% from summer 2022 and an increase of 3.5% from the previous winter. Summer 2022 natural gas demand is expected to be 1.5% higher than last year, mainly due to the Gulf Coast due to expansions of petrochemical and other industrial facilities in the region. Winter 2023 natural gas demand is expected to be 3.5% lower than summer 2023, down 3.5% from summer 2022 levels and up 1.5% from winter 2022 levels.

Power burn is expected to average 40.5 Bcu/d (1,946 + 10% up 6.3% from the five-year average). Consistent with past summers, and as seen in Figure 4, power burn is forecast to peak at 45 Bcu/d (2,160 + 10% up 6.3% from the five-year average) in Bcu/d (1.2 + 10% m/d), while June and September will see less demand at 35 Bcu/d (1,680 + 10% m/d) and 30 Bcu/d (1,440 + 10% m/d), respectively. The demand for power burn is determined by overall electricity consumption, which is driven in summer by high demand for air conditioning and electricity for other uses.

electricity generation output relative to total U.S. electricity generation in 2002 was 42.5%, up from 42.0% in the year average of 2001. Combined, natural gas and coal-fired generation in the United States this summer, at 63%, but this summer's share of electricity generation from natural gas in natural gas and coal-fired electricity generation share in electricity is expected to be greatly offset by increased use of the share of generation from hydro, geothermal and renewable energy resources, producing a net decrease in total U.S. generation.

NATURAL GAS EXPORTS AND IMPORTS
 The U.S. is a net exporter of natural gas, with exports primarily to heightened international LNG demand and the Freeport LNG export terminal's return to service (see Figure 5). International LNG demand is expected to be largely driven by Europe, though the U.S. is also expected to see international gas exports from Russia with increased imported LNG. In addition, reduced LNG prices in 2023 due to a mild winter

mer. For context, gross pipeline exports averaged 5.9 Bscfd ($24.7 \times 10^6 \text{ m}^3/\text{d}$) to Mexico and 2.2 Bscfd ($9.2 \times 10^6 \text{ m}^3/\text{d}$) to Canada in summer 2022. Mexico has expanded its natural gas capacity to export to the United States, but it is increasingly relying on imported natural gas from U.S. pipelines. The U.S. has a gross pipeline capacity to export approximately 0.5 Bscfd ($1.8 \times 10^6 \text{ m}^3/\text{d}$) to Canada in gas into this year. In contrast, the U.S. exports gross pipeline imports primarily from Canada, at average 7 Bscfd ($29.8 \times 10^6 \text{ m}^3/\text{d}$) in summer 2023, a 0.8 Bscfd increase from 2022.

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Outlook For Natural Gas A Quality Fuel

United States. Department of Energy

A red circular graphic with a gradient, appearing as a partial circle or a stylized arrow pointing to the right, located to the right of the United States Department of Energy text.

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Outlook for Natural Gas--a Quality Fuel Institute of Petroleum (Great Britain), Peter Hepple, 1973 Outlook for Natural Gas - A Quality Fuel Hepple P Ed, 1973 **Outlook for Natural Gas** Peter Hepple, 1873 NSF-RANN Energy Abstracts, 1974 *Annual Energy Outlook 2011, with Projections To 2035* Energy Information Administration (U.S.), 2011-06-14

The projections in the Energy Information Administration's EIA Annual Energy Outlook 2011 AEO2011 focus on the factors that shape the U S energy system over the long term Under the assumption that current laws and regulations remain unchanged throughout the projections the AEO2011 Reference case provides the basis for examination and discussion of energy production consumption technology and market trends and the direction they may take in the future It also serves as a starting point for analysis of potential changes in energy policies But AEO2011 is not limited to the Reference case It also includes 57 sensitivity cases see Appendix E Table E1 which explore important areas of uncertainty for markets technologies and policies in the U S energy economy Key results highlighted in AEO2011 include strong growth in shale gas production growing use of natural gas and renewables in electric power generation declining reliance on imported liquid fuels and projected slow growth in energy related carbon dioxide CO2 emissions even in the absence of new policies designed to mitigate greenhouse gas GHG emissions AEO2011 also includes in depth discussions on topics of special interest that may affect the energy outlook They include impacts of the continuing renewal and updating of Federal and State laws and regulations discussion of world oil supply and price trends shaped by changes in demand from countries outside the Organization for Economic Cooperation and Development or in supply available from the Organization of the Petroleum Exporting Countries an examination of the potential impacts of proposed revisions to Corporate Average Fuel Economy standards for light duty vehicles and proposed new standards for heavy duty vehicles the impact of a series of updates to appliance standard alone or in combination with revised building codes the potential impact on natural gas and crude oil production of an expanded offshore resource base prospects for shale gas the impact of cost uncertainty on construction of new electric power plants the economics of carbon capture and storage and the possible impact of regulations on the electric power sector under consideration by the U S Environmental Protection Agency EPA Some of the highlights from those discussions are mentioned in this Executive Summary Readers interested in more detailed analyses and discussions should refer to the Issues in focus section of this report I

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