

EIA's Oil and Gas Outlook Through 2025

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Energy Information Administration

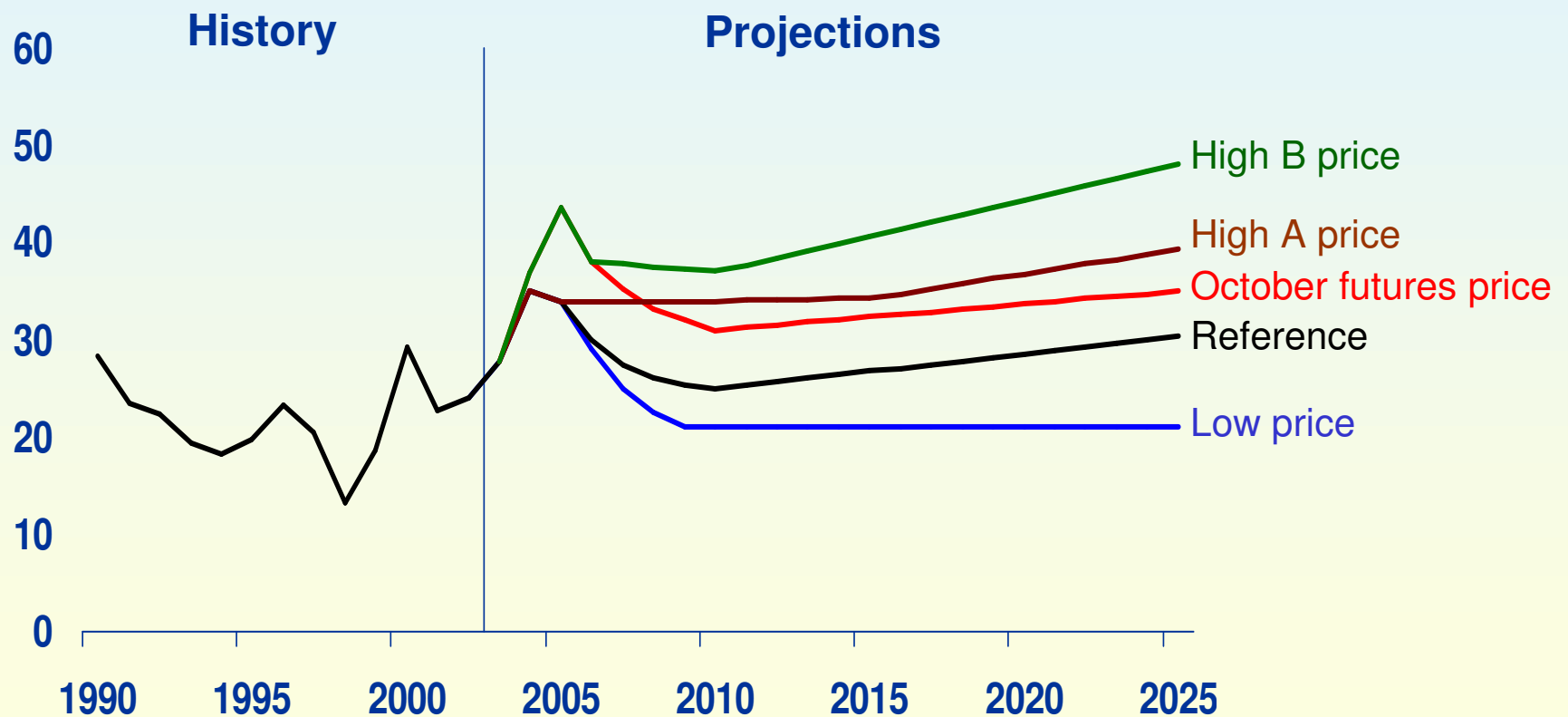
Phyllis.Martin@eia.doe.gov

Coastal Zone Management 2005 Conference

July 18, 2005

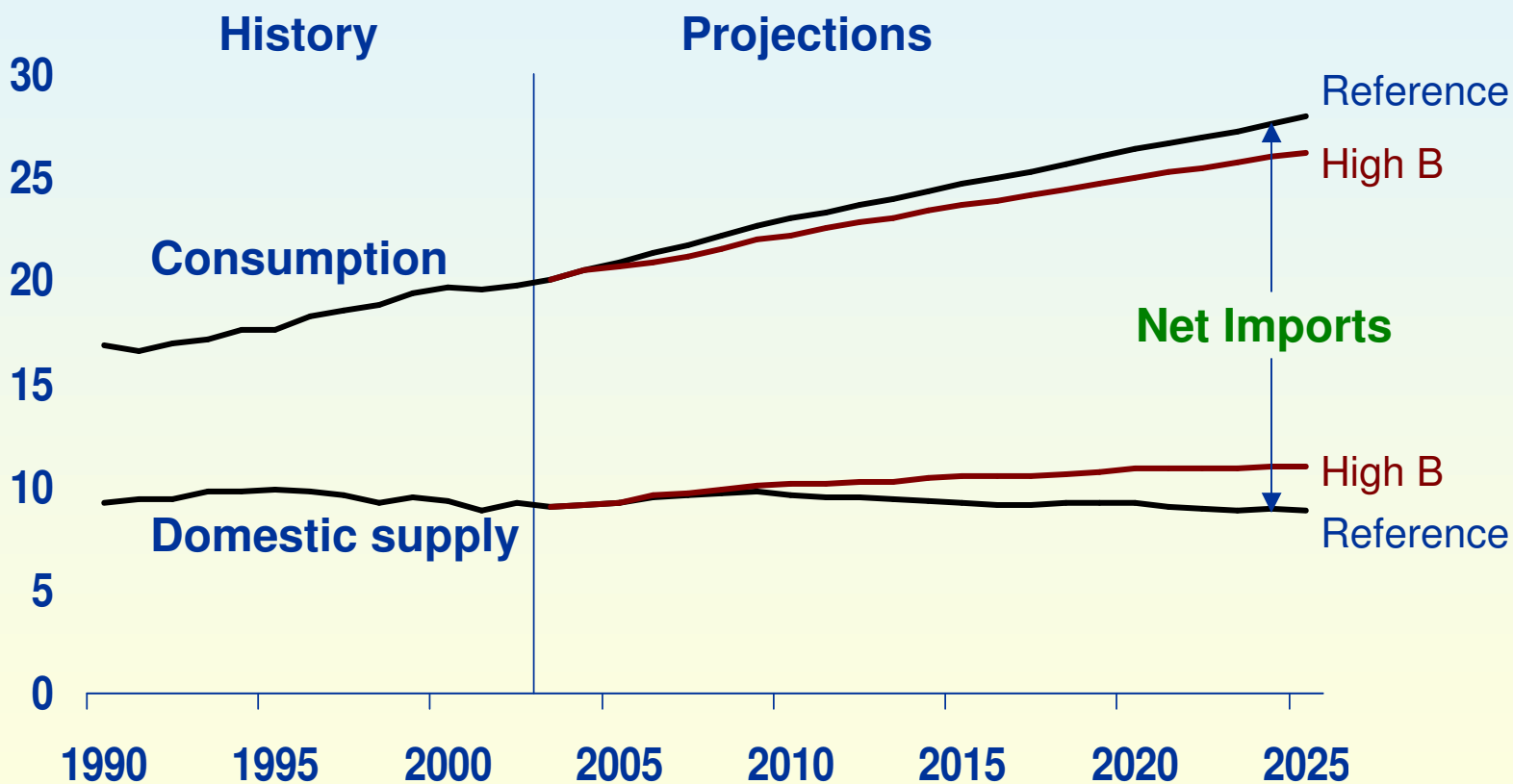
New Orleans, LA

World Oil Prices in Five Cases, 1990-2025 (2003 dollars per barrel)



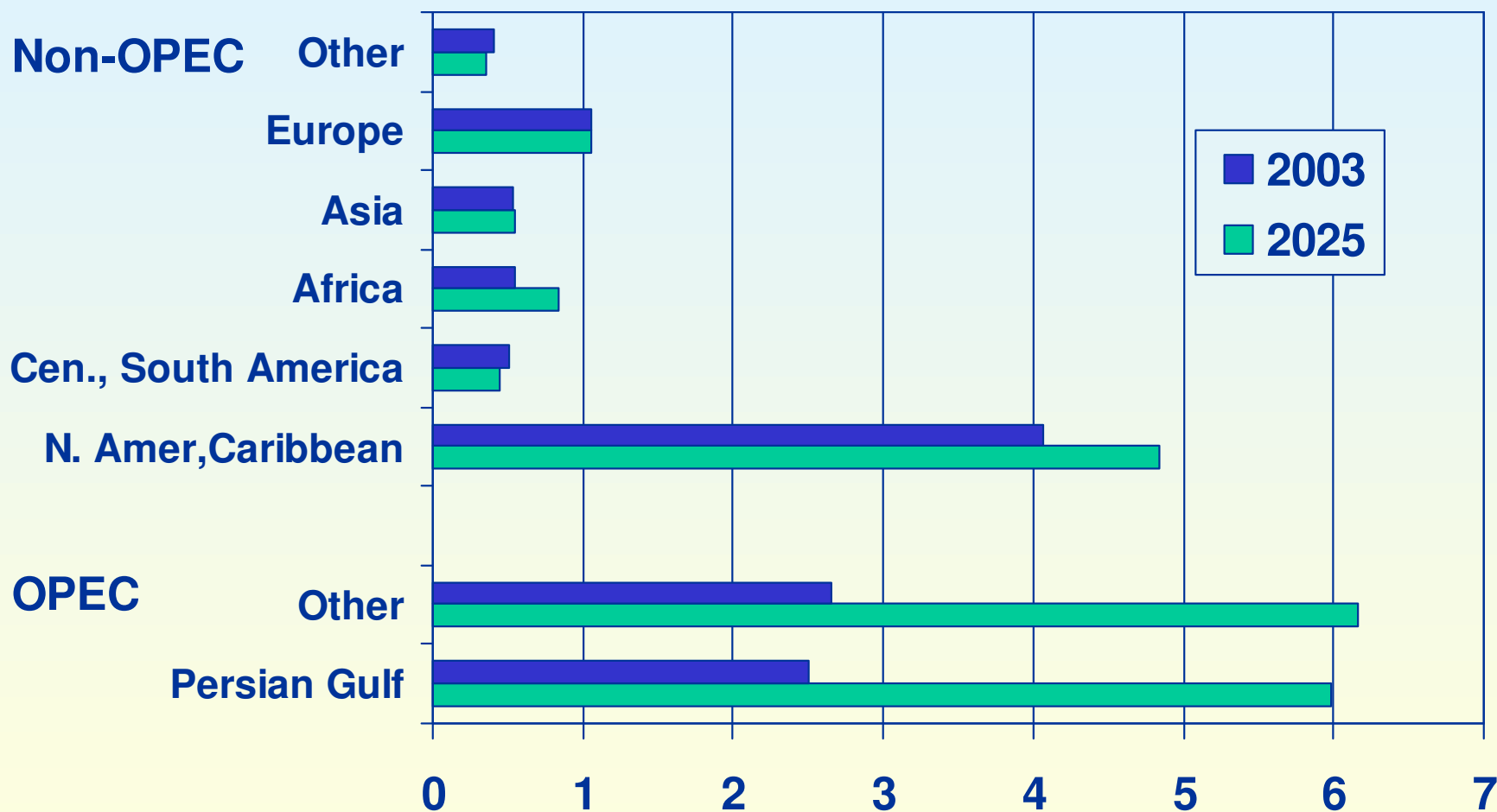
Source: *Annual Energy Outlook 2005*

Petroleum Supply, Consumption, and Imports, 1990-2025 (million barrels per day)



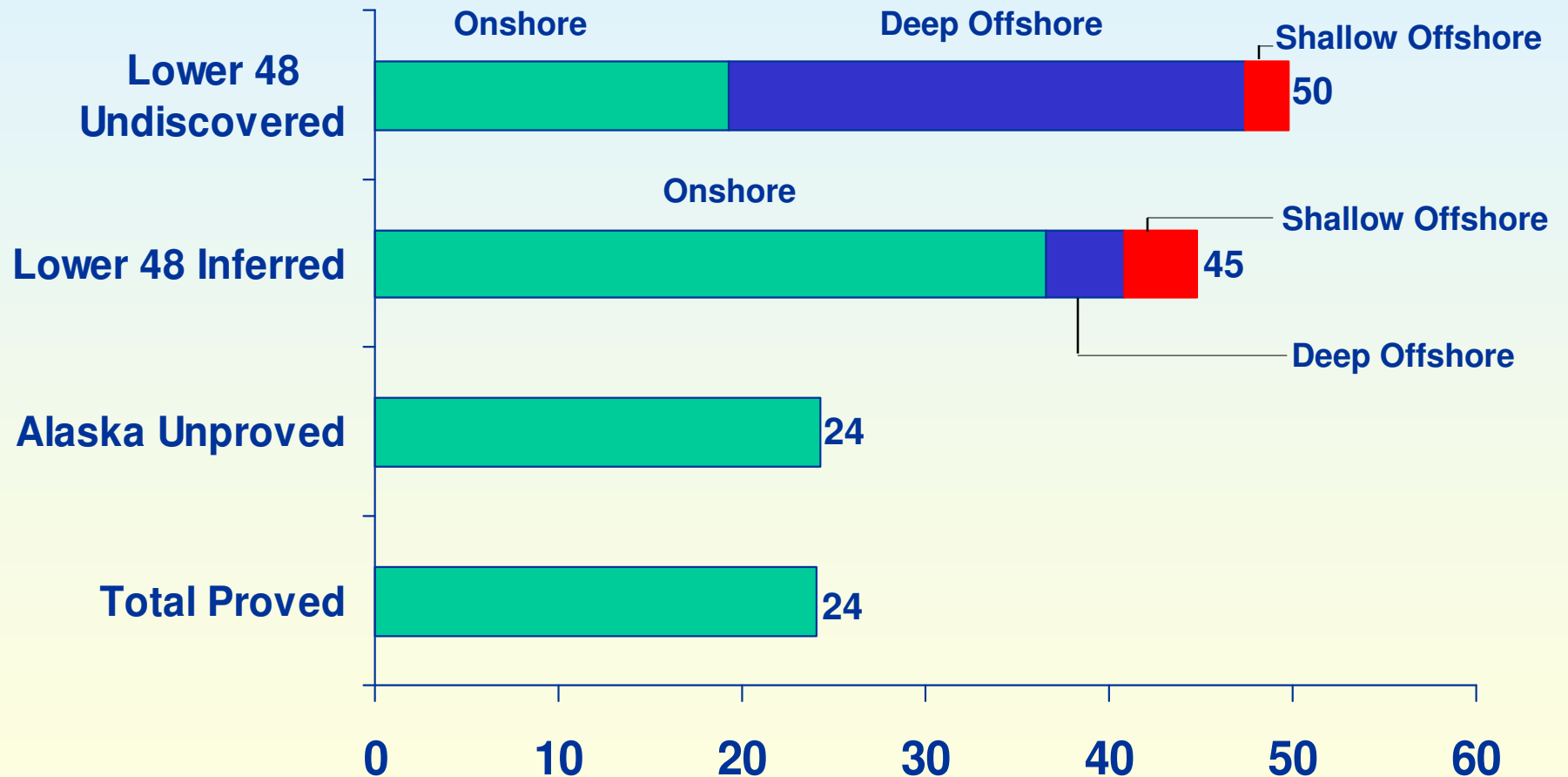
Source: *Annual Energy Outlook 2005*

Petroleum Imports into the U.S. by Source, 2003 and 2025 (million barrels per day)



Source: *Annual Energy Outlook 2005*

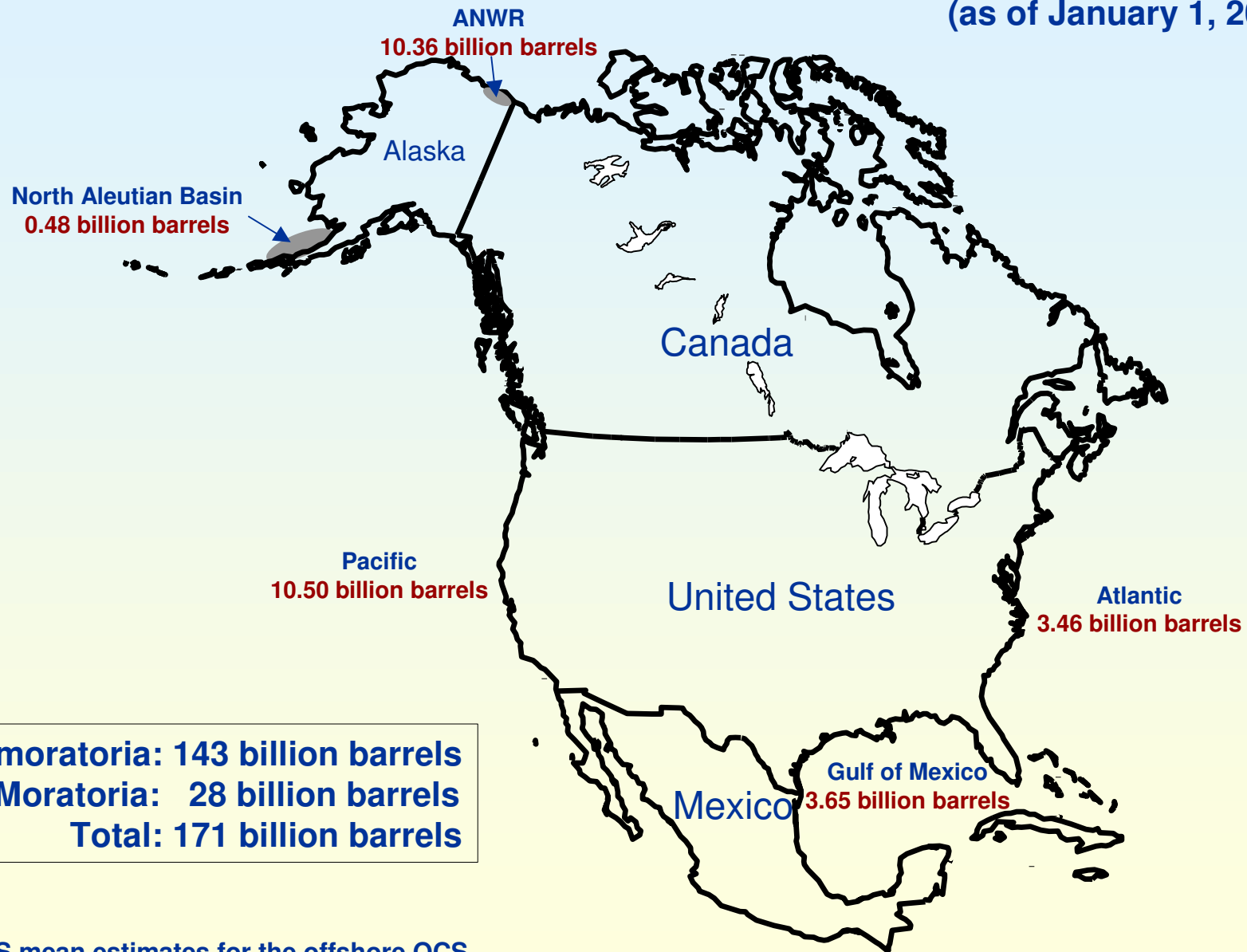
Technically Recoverable U.S. Crude Oil Resources as of January 1, 2003 (billion barrels)



Total: 143 billion barrels

Technically Recoverable U.S. Crude Oil Resources under Moratoria*

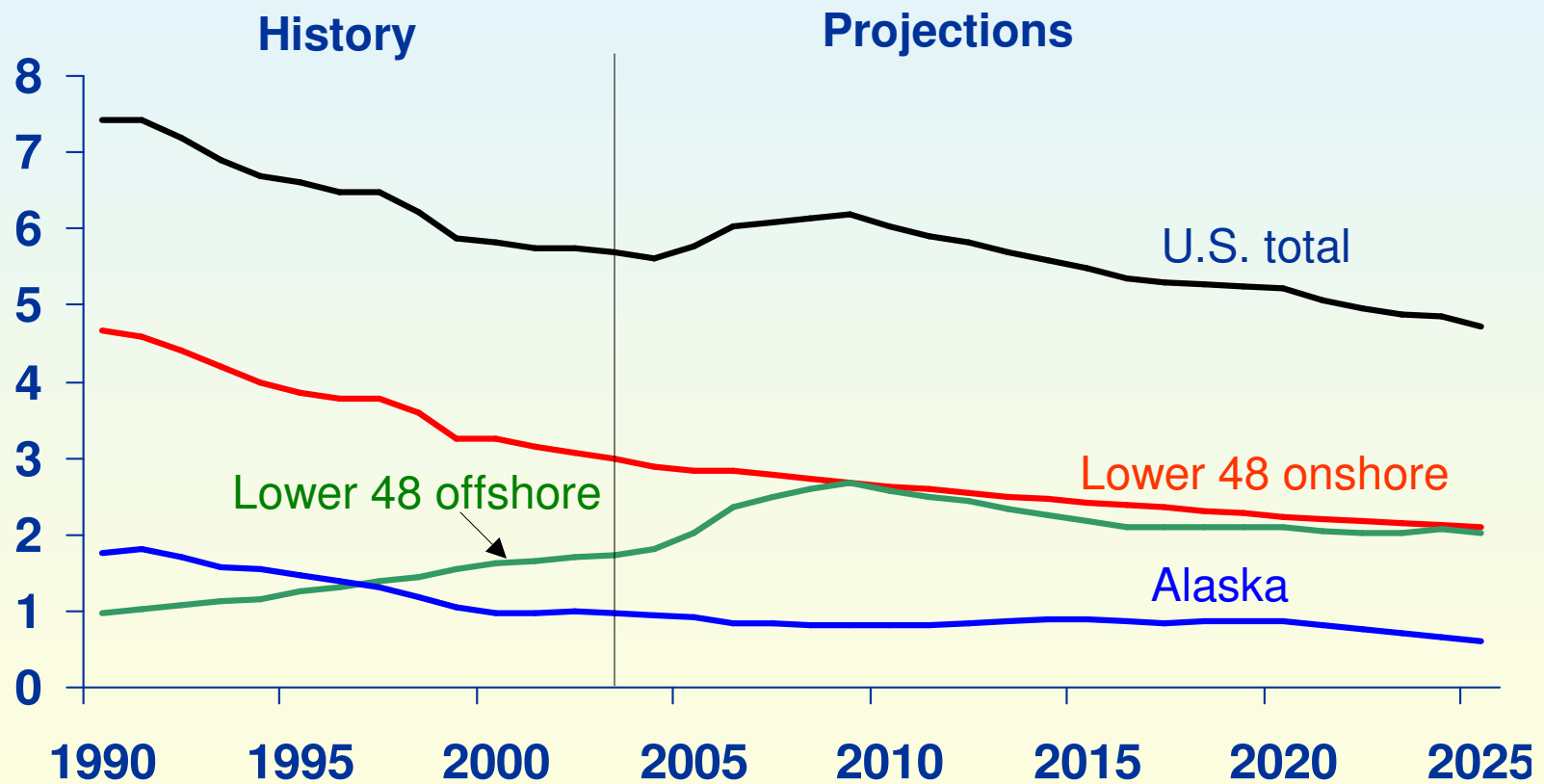
(as of January 1, 2003)



Non-moratoria: 143 billion barrels
Moratoria: 28 billion barrels
Total: 171 billion barrels

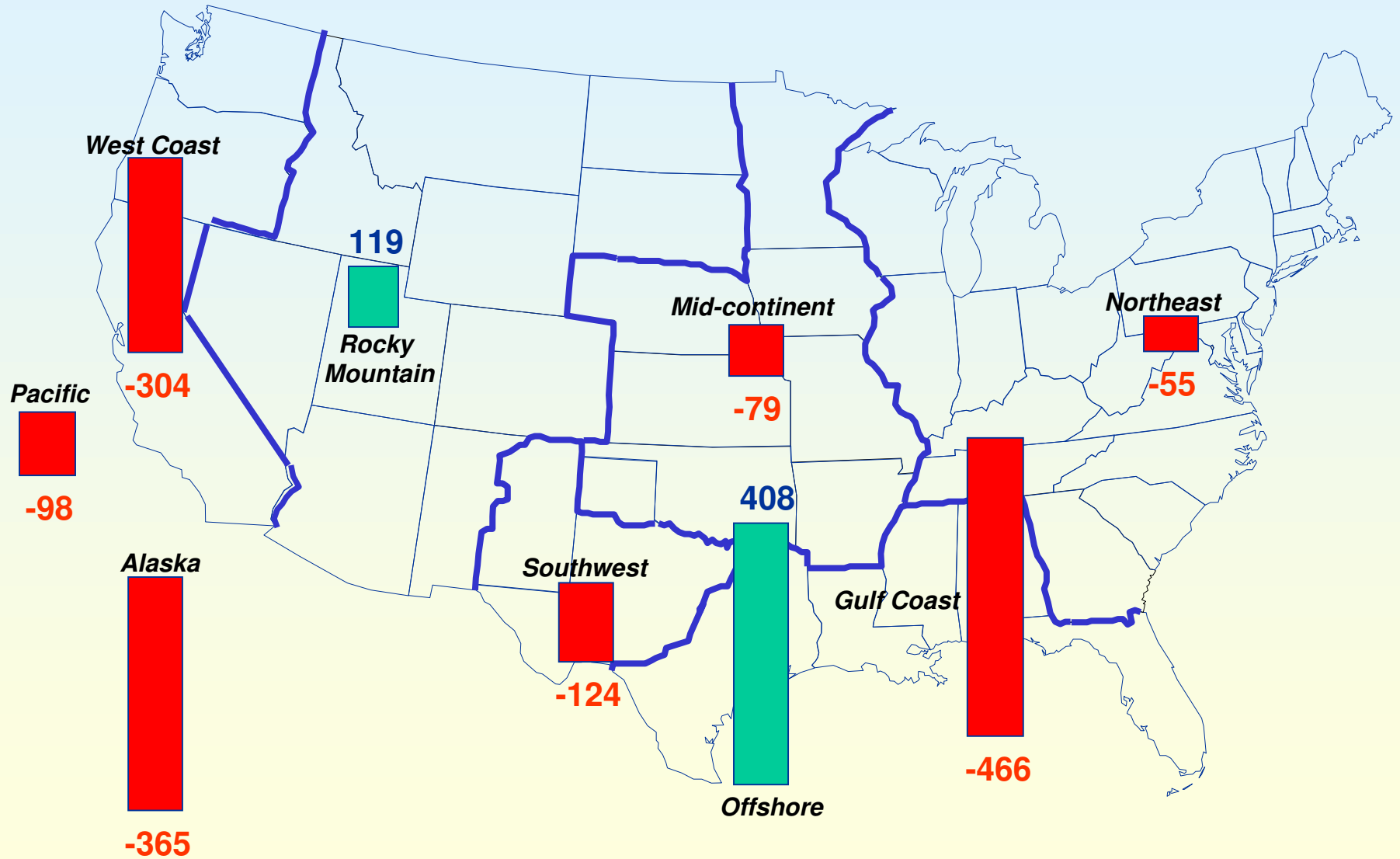
*MMS mean estimates for the offshore OCS
As of January 1, 2003

Domestic Crude Oil Production, 1990-2025 (million barrels per day)



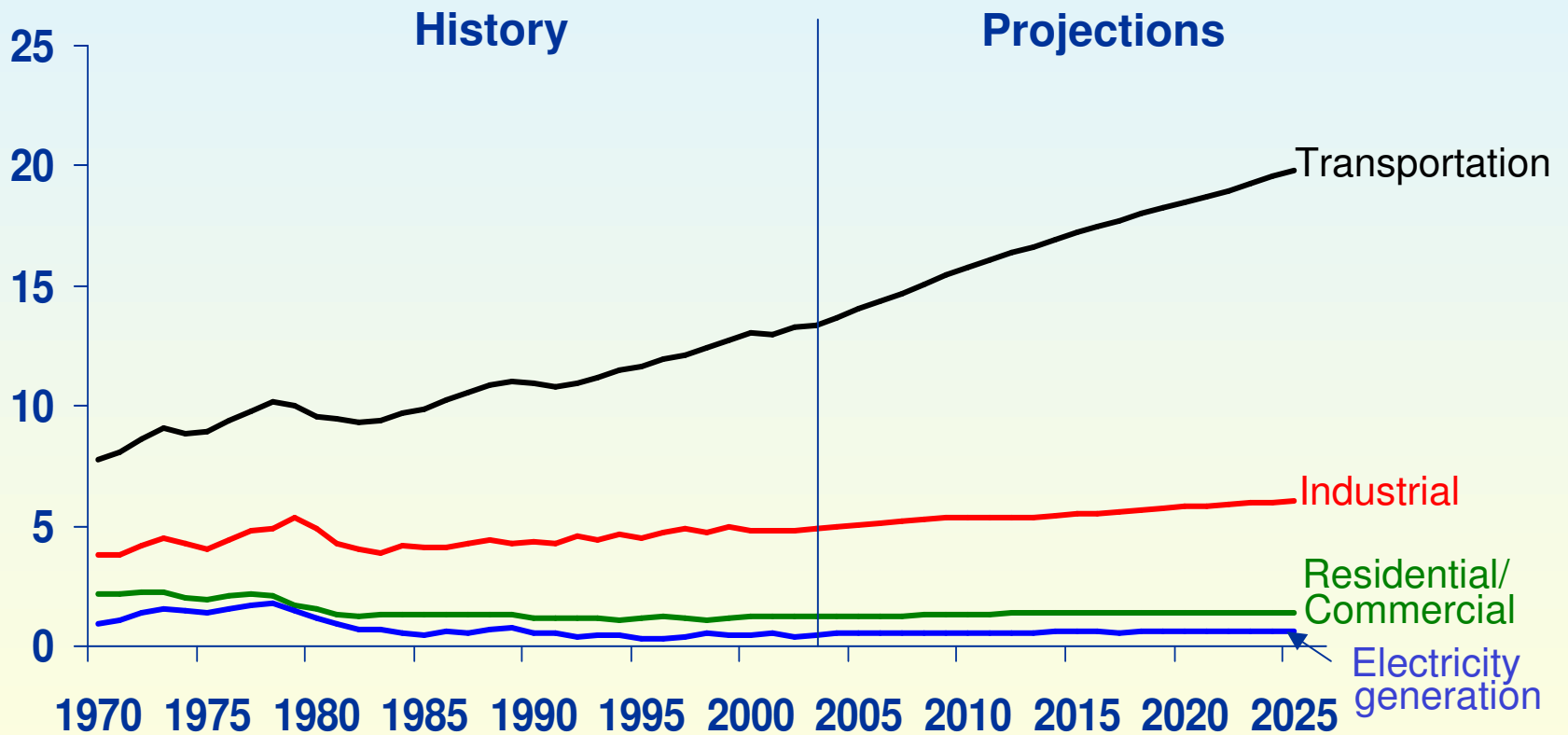
Source: *Annual Energy Outlook 2005*

Incremental Crude Oil Production, 2003-2025 (thousand barrels per day)



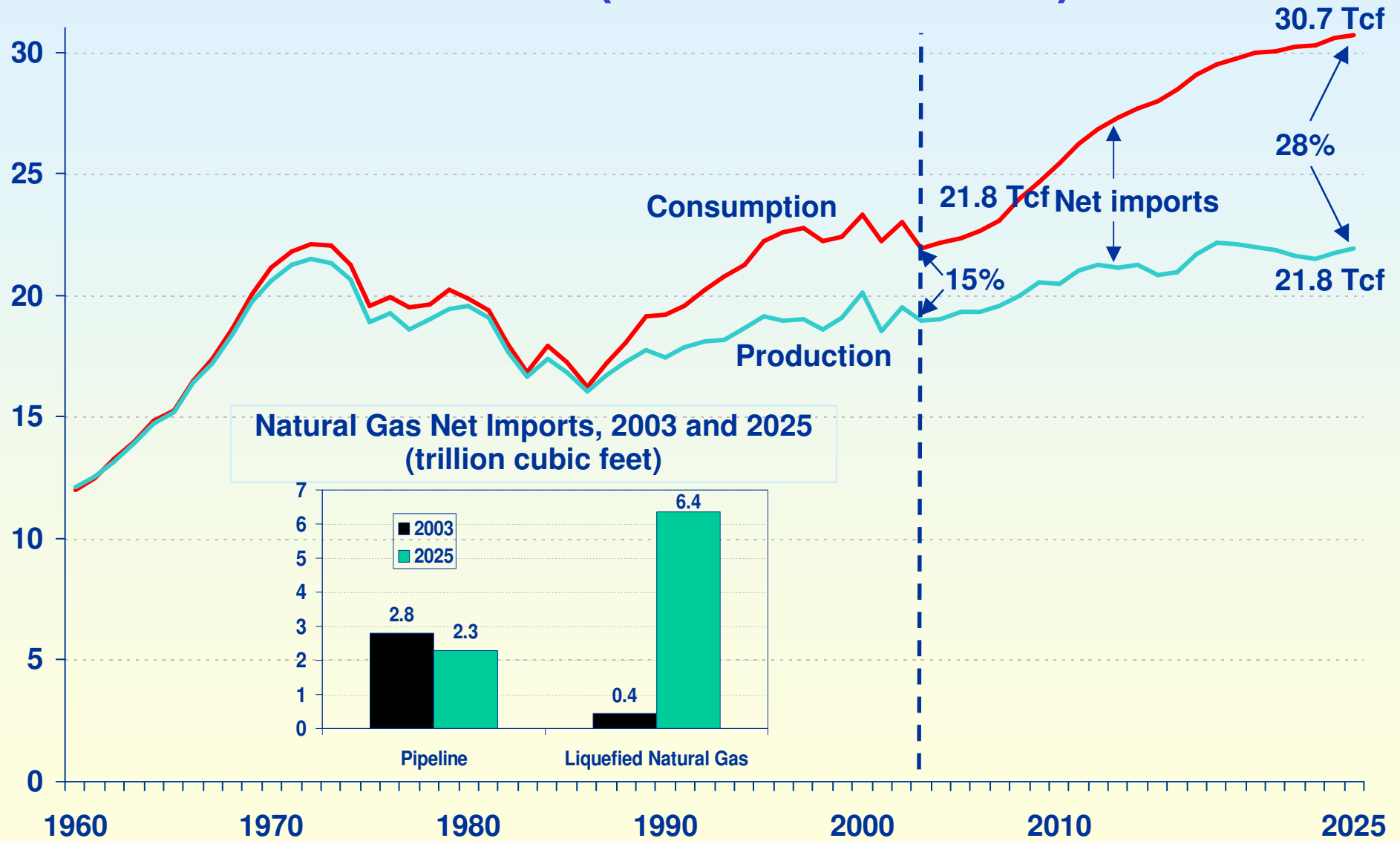
Source: Annual Energy Outlook 2005

U.S. Petroleum Consumption by Sector, 1970-2025 (million barrels per day)

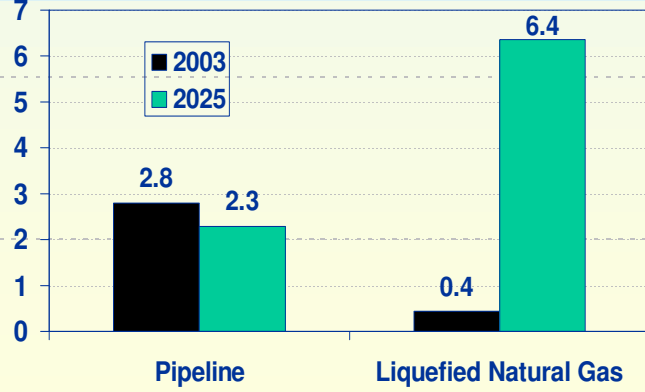


Source: *Annual Energy Outlook 2005*

Natural Gas Production, Consumption, and Imports, 1970-2025 (trillion cubic feet)

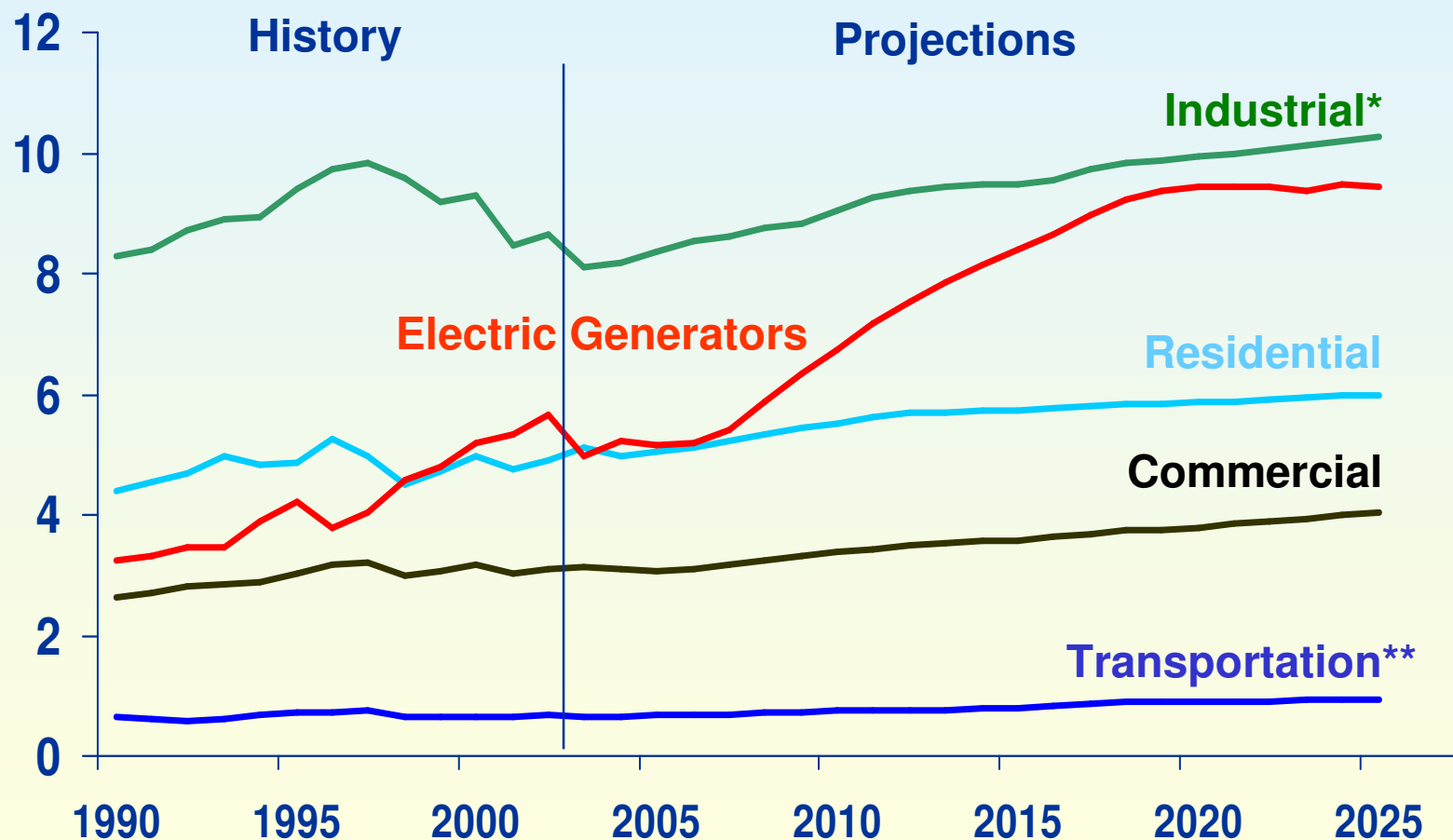


Natural Gas Net Imports, 2003 and 2025 (trillion cubic feet)



Source: Annual Energy Outlook 2005

U.S. Natural Gas Consumption by Sector, 1990-2025 (trillion cubic feet)

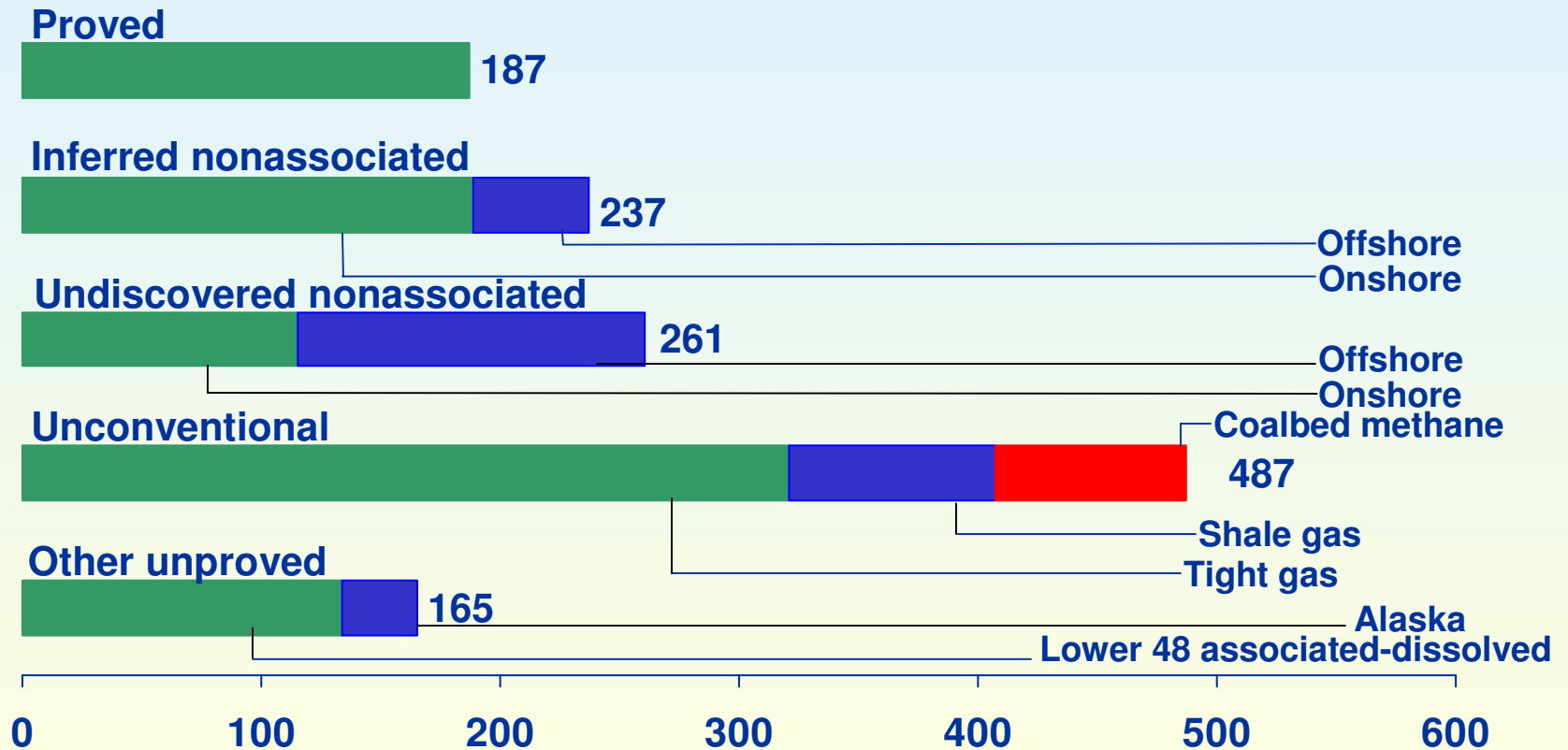


* Includes lease and plant fuel

** Includes pipeline fuel

Source: *Annual Energy Outlook 2005*

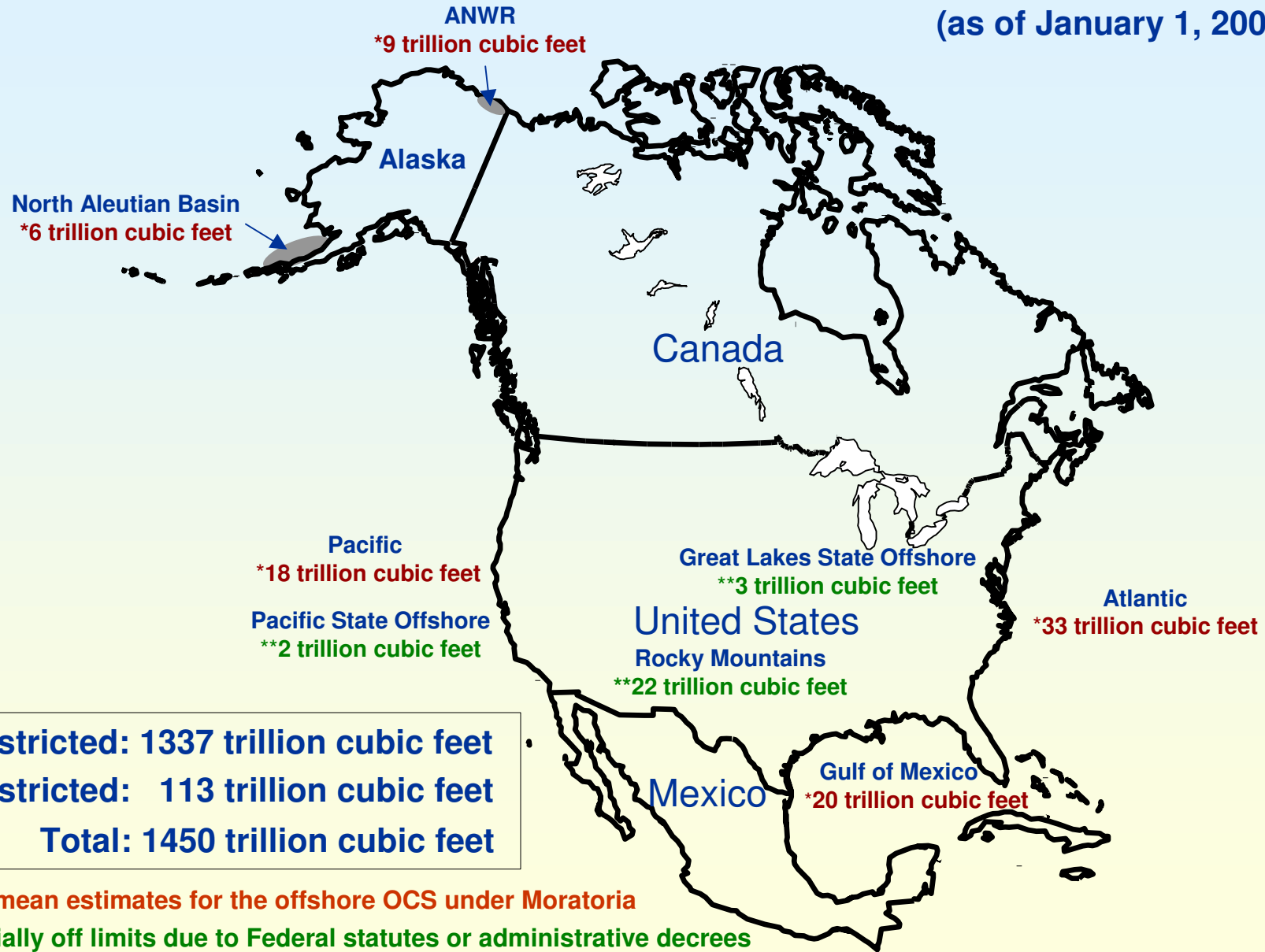
Technically Recoverable U.S. Natural Gas Resources as of January 1, 2003 (trillion cubic feet)



Total: 1,337 trillion cubic feet

Technically Recoverable Restricted Access U.S. Natural Gas Resources

(as of January 1, 2003)

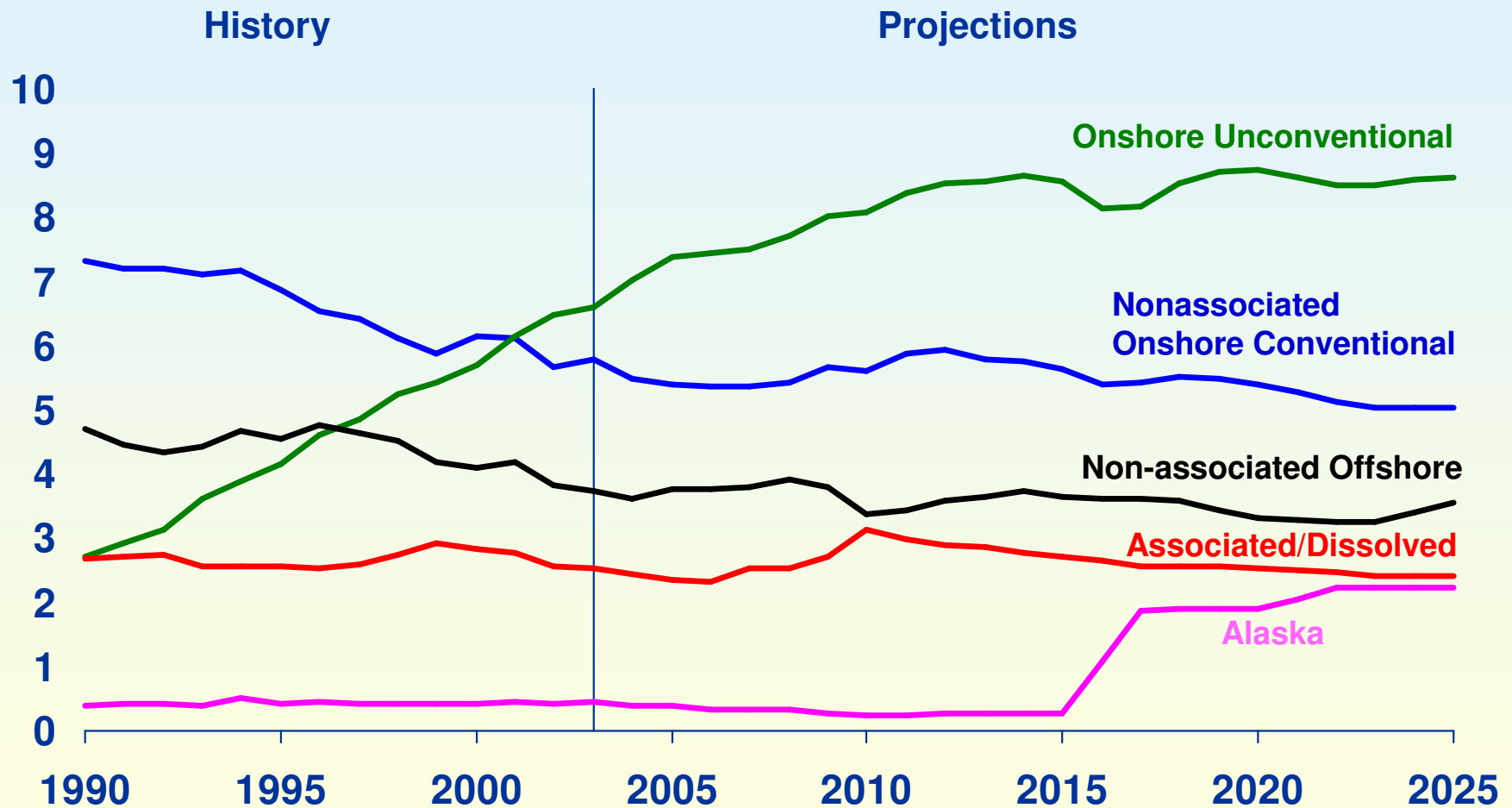


Non-restricted: 1337 trillion cubic feet
Restricted: 113 trillion cubic feet
Total: 1450 trillion cubic feet

*MMS mean estimates for the offshore OCS under Moratoria

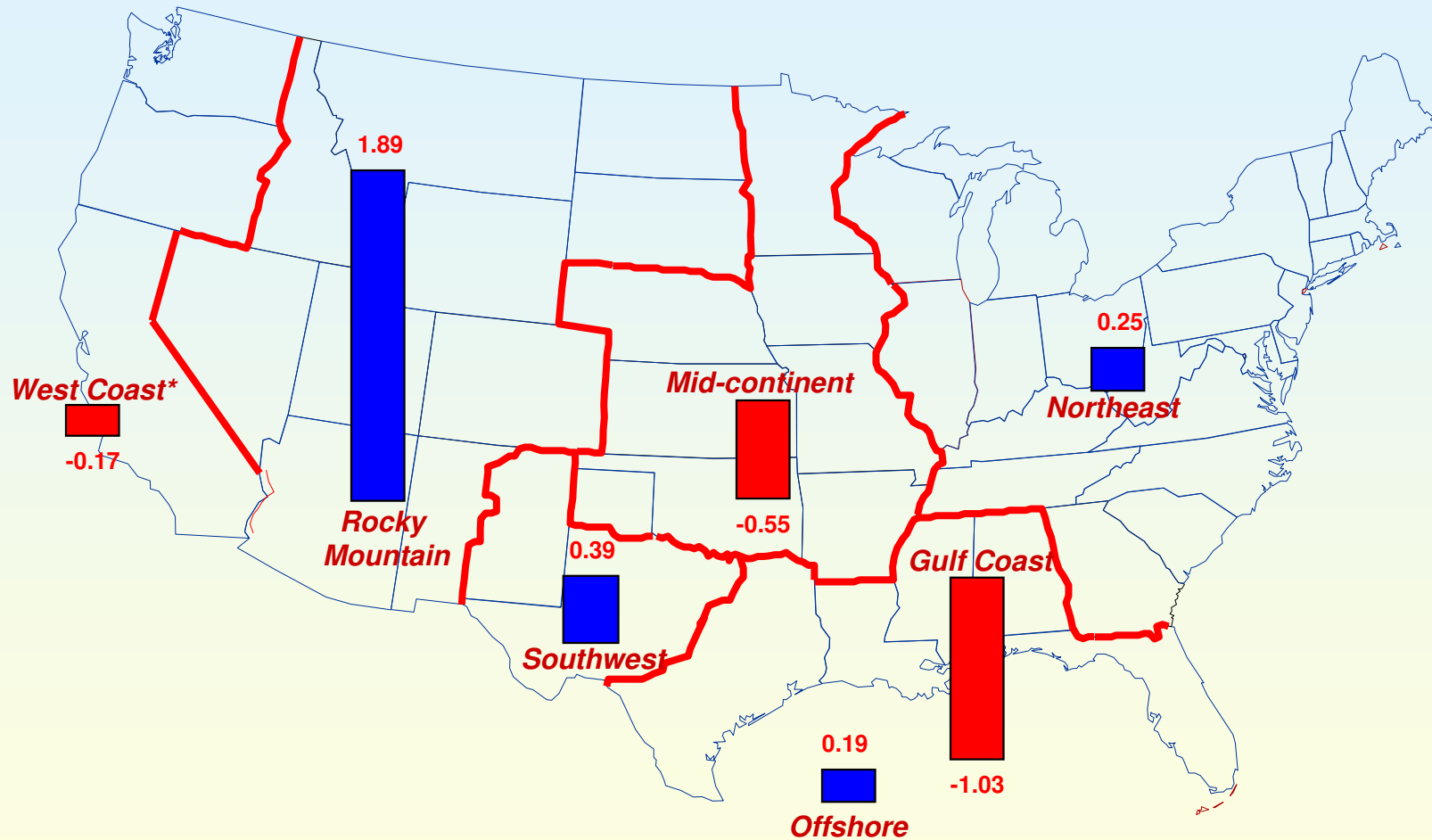
**Officially off limits due to Federal statutes or administrative decrees

U.S. Dry Natural Gas Production, 1990 - 2025 (trillion cubic feet)



Source: *Annual Energy Outlook 2005*

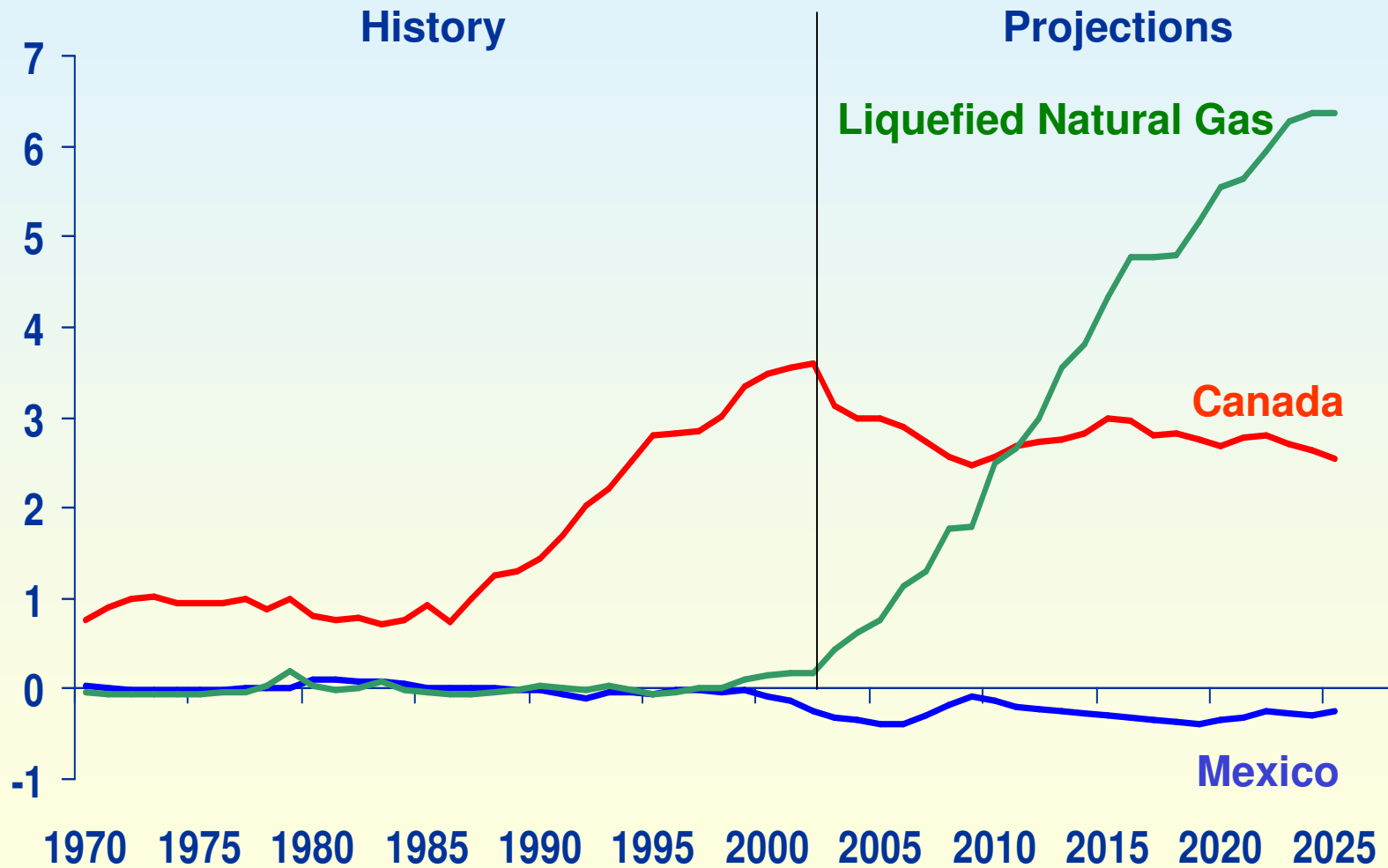
Incremental Natural Gas Production by Region, 2003-2025 (trillion cubic feet)



* Includes Offshore

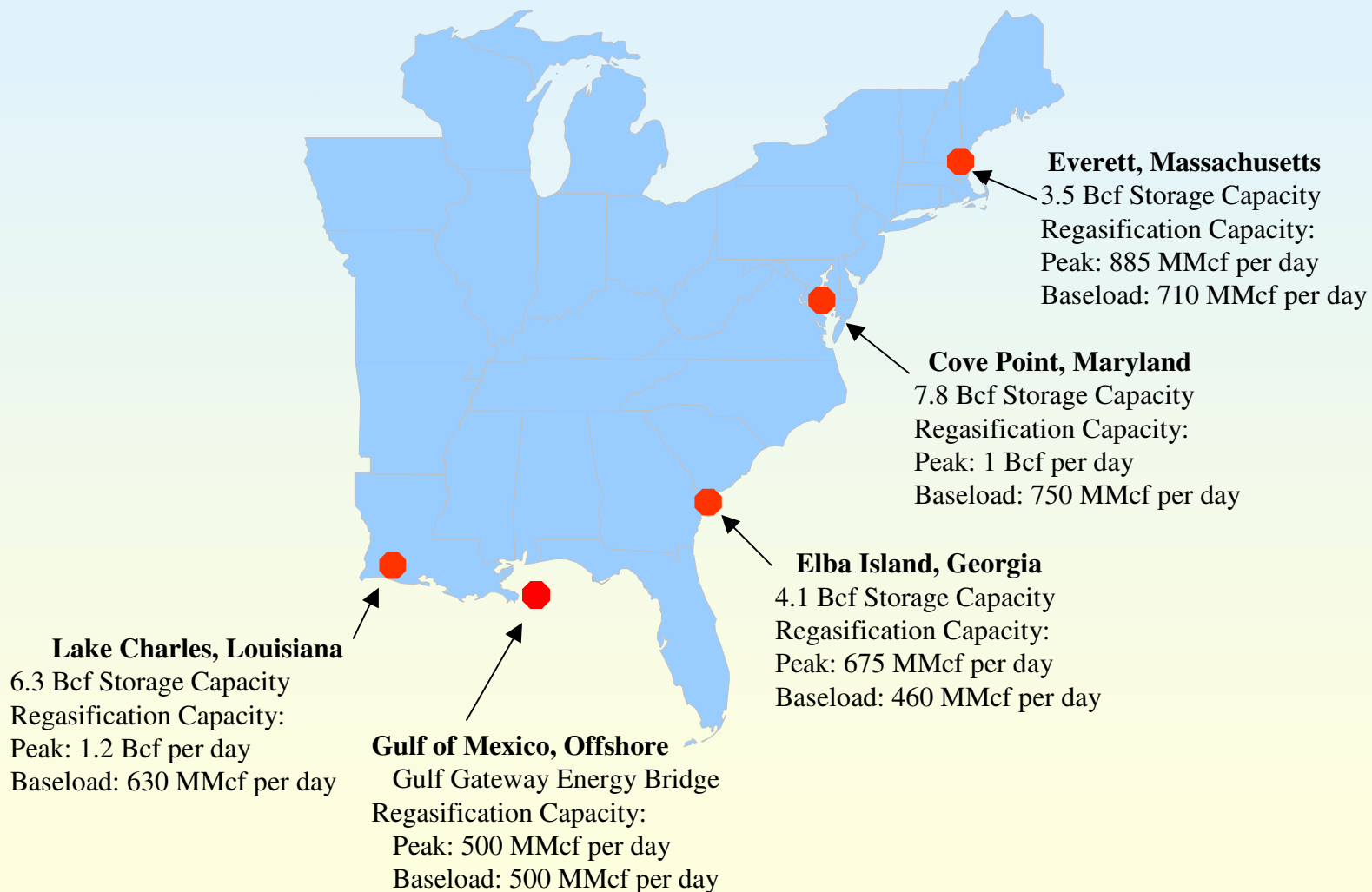
Source: Annual Energy Outlook 2005

Net U.S. Imports of Natural Gas, 1970-2025 (trillion cubic feet)



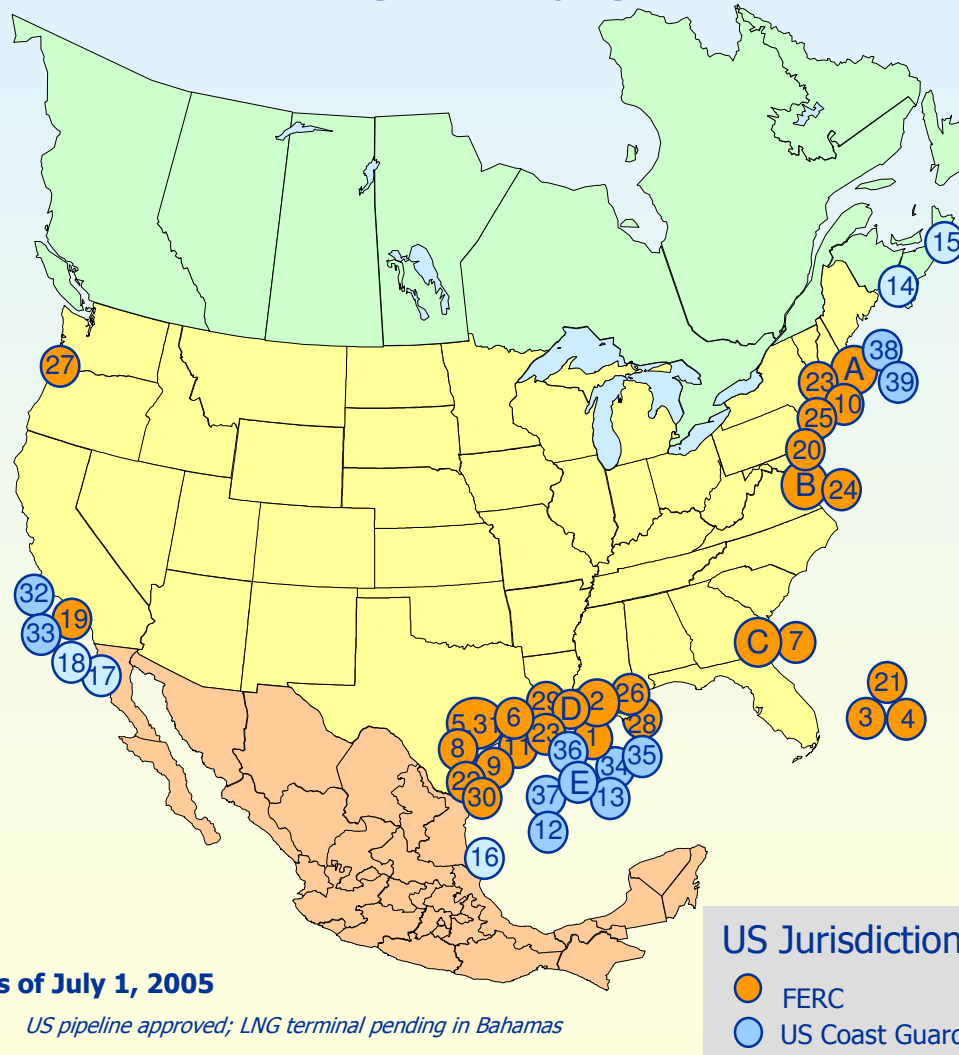
Source: *Annual Energy Outlook 2005*

Current U.S. LNG Import Terminals



Source: Energy Information Administration

Existing and Proposed North American LNG Terminals



As of July 1, 2005

* US pipeline approved; LNG terminal pending in Bahamas

CONSTRUCTED

- A. Everett, MA : 1.035 Bcfd (Tractebel - DOMAC)
- B. Cove Point, MD : 1.0 Bcfd (Dominion - Cove Point LNG)
- C. Elba Island, GA : 0.68 Bcfd (El Paso - Southern LNG)
- D. Lake Charles, LA : 1.0 Bcfd (Southern Union - Trunkline LNG)
- E. Gulf of Mexico: 0.5 Bcfd, (Gulf Gateway Energy Bridge - Excelerate Energy)

APPROVED BY FERC

- 1. Lake Charles, LA: 1.1 Bcfd (Southern Union - Trunkline LNG)
- 2. Hackberry, LA : 1.5 Bcfd, (Sempra Energy)
- 3. Bahamas : 0.84 Bcfd, (AES Ocean Express)*
- 4. Bahamas : 0.83 Bcfd, (Calypto Tractebel)*
- 5. Freeport, TX : 1.5 Bcfd, (Cheniere/Freeport LNG Dev.)
- 6. Sabine, LA : 2.6 Bcfd (Cheniere LNG)
- 7. Elba Island, GA: 0.54 Bcfd (El Paso - Southern LNG)
- 8. Corpus Christi, TX: 2.6 Bcfd, (Cheniere LNG)
- 9. Corpus Christi, TX : 1.0 Bcfd (Vista Del Sol - ExxonMobil)
- 10. Fall River, MA : 0.8 Bcfd, (Weaver's Cove Energy/Hess LNG)
- 11. Sabine, TX : 1.0 Bcfd (Golden Pass - ExxonMobil)

APPROVED BY MARAD/COAST GUARD

- 12. Port Pelican: 1.6 Bcfd, (Chevron Texaco)
 - 13. Louisiana Offshore : 1.0 Bcfd (Gulf Landing - Shell)
- CANADIAN APPROVED TERMINALS**
- 14. St. John, NB : 1.0 Bcfd, (Canaport - Irving Oil)
 - 15. Point Tupper, NS 1.0 Bcfd (Bear Head LNG - Anadarko)

MEXICAN APPROVED TERMINALS

- 16. Altamira, Tamulipas : 0.7 Bcfd, (Shell/Total/Mitsui)
- 17. Baja California, MX : 1.0 Bcfd, (Sempra & Shell)
- 18. Baja California - Offshore : 1.4 Bcfd, (Chevron Texaco)

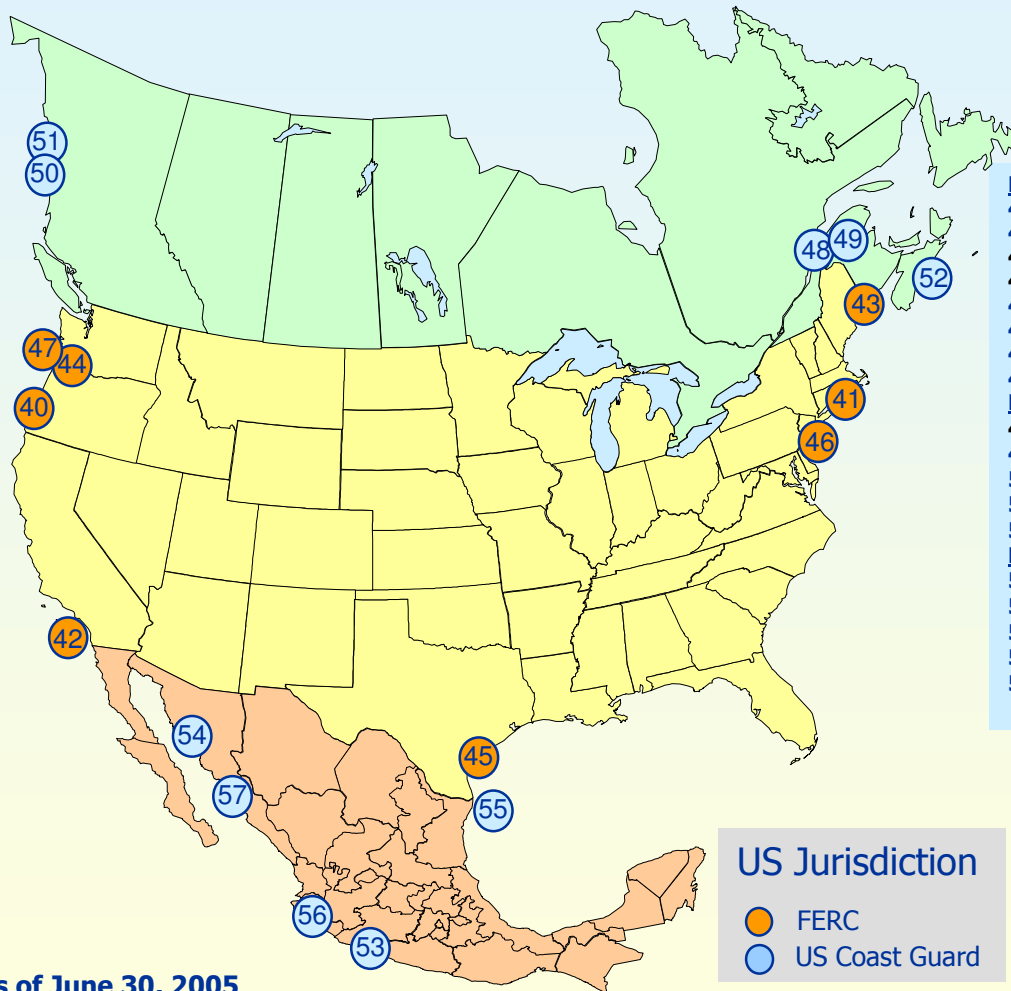
PROPOSED TO FERC

- 19. Long Beach, CA : 0.7 Bcfd, (Mitsubishi/ConocoPhillips - Sound Energy Solutions)
- 20. Logan Township, NJ : 1.2 Bcfd (Crown Landing LNG - BP)
- 21. Bahamas : 0.5 Bcfd, (Seafarer - El Paso/FPL)
- 22. Corpus Christi, TX: 1.0 Bcfd (Ingleside Energy - Occidental Energy Ventures)
- 23. Port Arthur, TX: 1.5 Bcfd (Sempra)
- 24. Cove Point, MD : 0.8 Bcfd (Dominion)
- 25. LI Sound, NY: 1.0 Bcfd (Broadwater Energy - TransCanada/Shell)
- 26. Pascagoula, MS: 1.0 Bcfd (Gulf LNG Energy LLC)
- 27. Bradwood, OR: 1.0 Bcfd (Northern Star LNG - Northern Star Natural Gas LLC)
- 28. Pascagoula, MS: 1.3 Bcfd (Casotte Landing - ChevronTexaco)
- 29. Cameron, LA: 3.3 Bcfd (Creole Trail LNG - Cheniere LNG)
- 30. Port Lavaca, TX: 1.0 Bcfd (Calhoun LNG - Gulf Coast LNG Partners)
- 31. Freeport, TX: 2.5 Bcfd, (Cheniere/Freeport LNG Dev. - Expansion)

PROPOSED TO MARAD/COAST GUARD

- 32. California Offshore: 1.5 Bcfd (Cabrillo Port - BHP Billiton)
- 33. So. California Offshore : 0.5 Bcfd, (Crystal Energy)
- 34. Louisiana Offshore : 1.0 Bcfd (Main Pass McMoRan Exp.)
- 35. Gulf of Mexico: 1.0 Bcfd (Compass Port - ConocoPhillips)
- 36. Gulf of Mexico: 2.8 Bcfd (Pearl Crossing - ExxonMobil)
- 37. Gulf of Mexico: 1.5 Bcfd (Beacon Port Clean Energy Terminal - ConocoPhillips)
- 38. Offshore Boston, MA: 0.4 Bcfd (Neptune LNG - Tractebel)
- 39. Offshore Boston, MA: 0.8 Bcfd (Northeast Gateway - Excelerate Energy)

Potential North American LNG Terminals



As of June 30, 2005

US Jurisdiction

- FERC
- US Coast Guard

POTENTIAL U.S. SITES IDENTIFIED BY PROJECT SPONSORS

- 40. Coos Bay, OR: 0.13 Bcfd, (Energy Projects Development)
- 41. Somerset, MA: 0.65 Bcfd (Somerset LNG)
- 42. California - Offshore: 0.75 Bcfd, (Chevron Texaco)
- 43. Pleasant Point, ME : 0.5 Bcf/d (Quoddy Bay, LLC)
- 44. St. Helens, OR: 0.7 Bcfd (Port Westward LNG LLC)
- 45. Galveston, TX: 1.2 Bcfd (Pelican Island - BP)
- 46. Philadelphia, PA: 0.6 Bcfd (Freedom Energy Center - PGW)
- 47. Astoria, OR: 1.0 Bcfd (Skipanon LNG - Calpine)

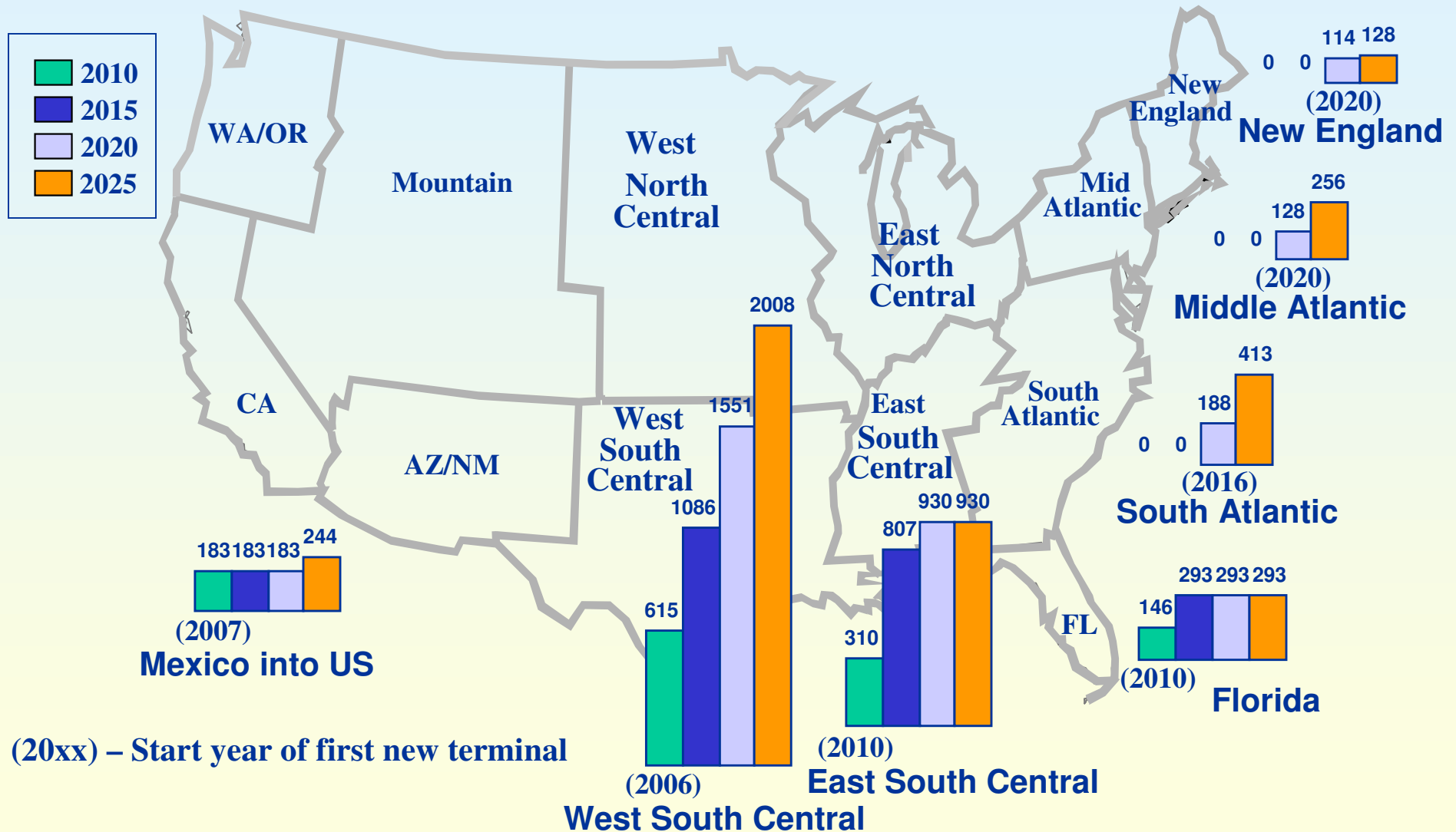
POTENTIAL CANADIAN SITES IDENTIFIED BY PROJECT SPONSORS

- 48. Quebec City, QC : 0.5 Bcfd (Project Rabaska - Enbridge/Gaz Met/Gaz de France)
- 49. Rivière-du- Loup, QC: 0.5 Bcfd (Cacouna Energy - TransCanada/PetroCanada)
- 50. Kitimat, BC: 0.61 Bcfd (Galveston LNG)
- 51. Prince Rupert, BC: 0.30 Bcfd (WestPac Terminals)
- 52. Goldboro, NS 1.0 Bcfd (Keltic Petrochemicals)

POTENTIAL MEXICAN SITES IDENTIFIED BY PROJECT SPONSORS

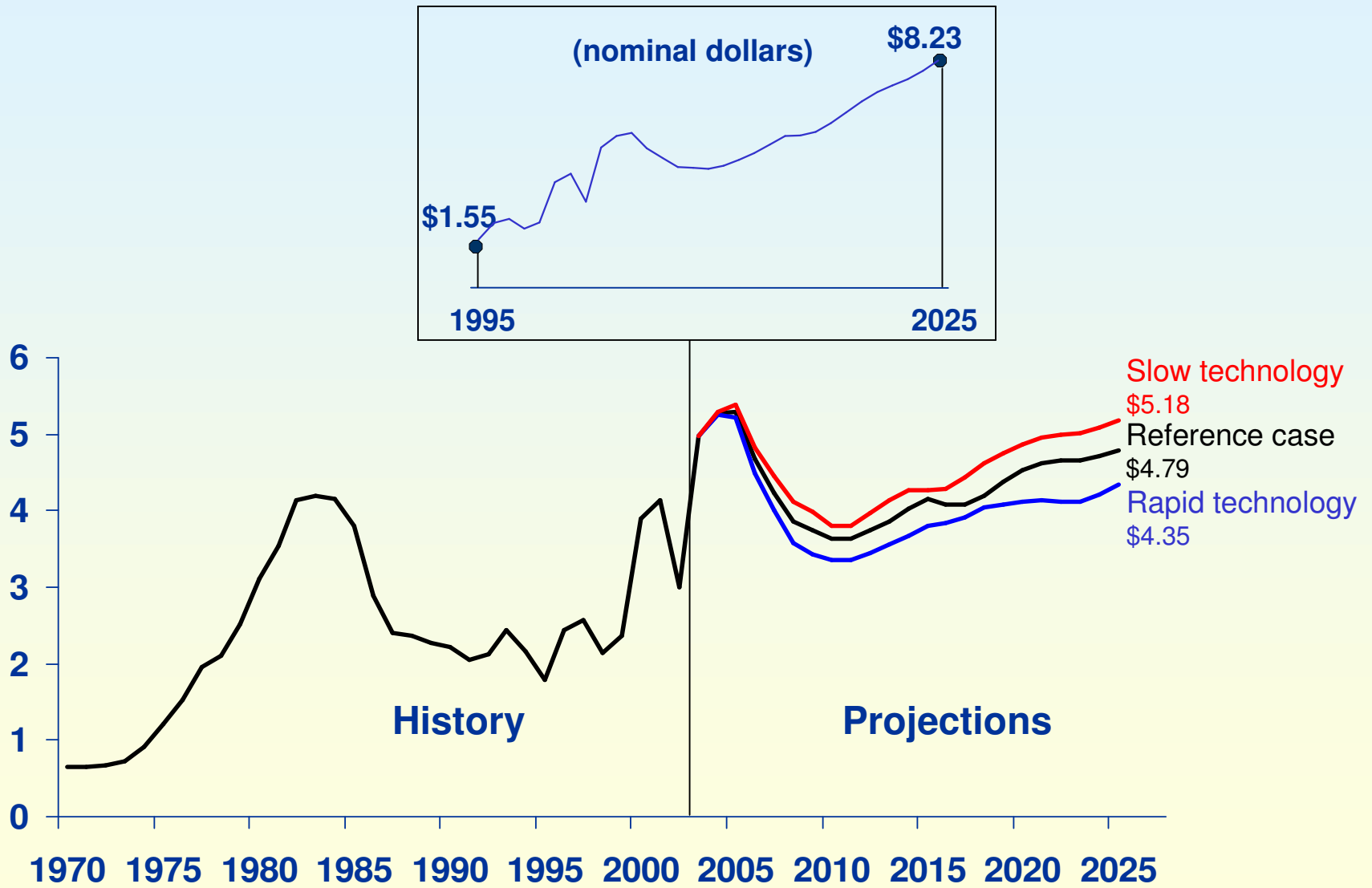
- 53. Lázaro Cárdenas, MX : 0.5 Bcfd (Tractebel/Repsol)
- 54. Puerto Libertad, MX: 1.3 Bcfd (Sonora Pacific LNG)
- 55. Offshore Gulf, MX: 1.0 Bcfd (Dorado - Tidelands)
- 56. Manzanillo, MX: 0.5 Bcfd
- 57. Topolobampo, MX: 0.5 Bcfd

Regional LNG Imports at New Terminals, 2010, 2015, 2020, and 2025 (billion cubic feet)



Source: EIA Annual Energy Outlook 2005

Lower 48 Natural Gas Wellhead Prices, 1970-2025 (2003 dollars per thousand cubic feet)



Source: Annual Energy Outlook 2005

Annual Energy Outlook 2005, December 9, 2004

Short-term Energy Outlook, monthly

International Energy Outlook 2005, July 26, 2005

Special Reports:

***The Global Liquefied Natural Gas Market: Status and Outlook,
December 2003***

“World Oil Price Cases,” Annual Energy Outlook 2005

“Restricted Natural Gas Supply Case,” Annual Energy Outlook 2005

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