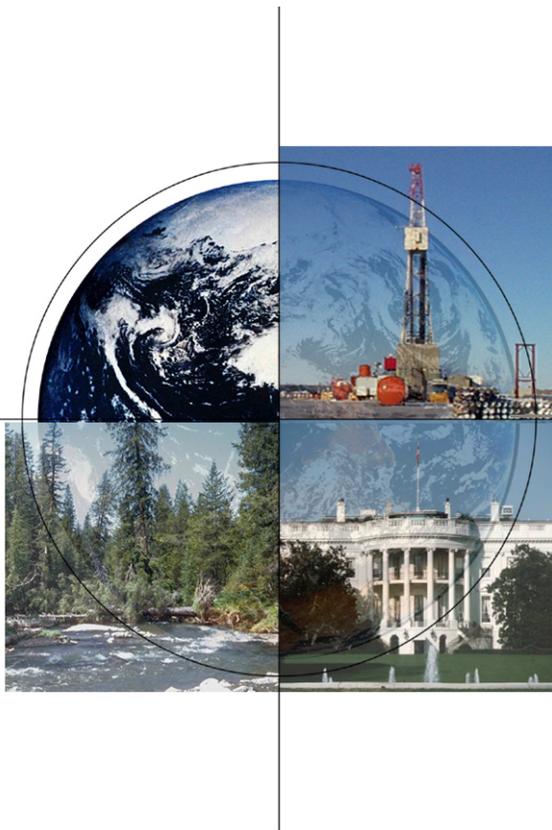


# Gas Industry Forum

## Perspectives on Natural Gas Demand



*Natural Gas Technologies II  
Conference*

*Ingenuity and Innovation*

*February 8-11, 2004  
Phoenix, AZ*

### Moderators

John R. Duda, Office of Fossil Energy, NETL  
Melanie Kenderdine, Washington Operations Office, GTI



**...Do We Have Your Attention...**

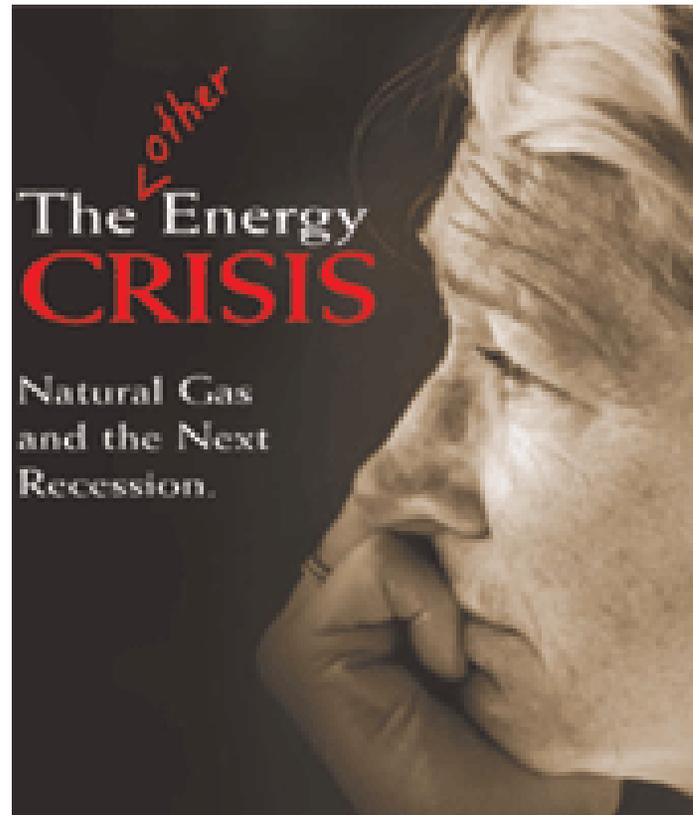
**“Heating Bills Shock Consumers”**

**January Gas Bill**

**\$559.35!**

*Richmond, VA family*

*USA Today, 2/10/04*



# Prices

## Perspectives on Natural Gas Demand

### Four price levels

- \$1.60, 2.35, 3.84, 5+
- Stay “high”?

Impact of LNG imports?

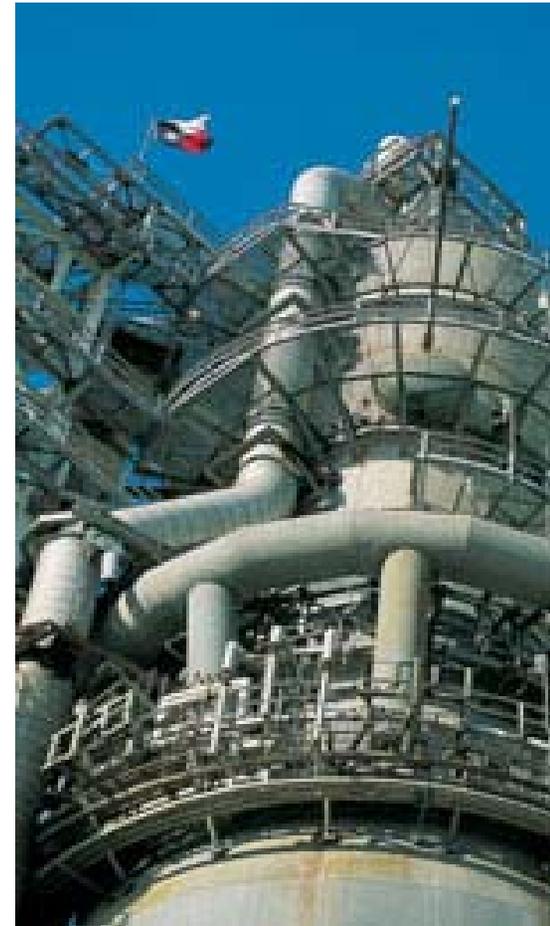


# Industrial Sector

## Perspectives on Natural Gas Demand

### Impacts on the sector

- Margins
- Loss of jobs
- Shift to offshore ops
- Gas acquisition strategies
- Product prices and the economy in general



# Efficiency and Conservation

## Perspectives on Natural Gas Demand

How big an impact?

- Actions taken
- Dampened demand
- Sector effects
- Plans for Efficiency/Conservation as we move forward



# Pipelines, Storage, and Imports

## Perspectives on Natural Gas Demand

### Energy Cos. and Utilities

- Business strategies
- Interaction with regulators
- More storage? Where?
- Gas fired generation
- Growth – where and when?



# Downstream Trends and Investment

## Perspectives on Natural Gas Demand

### Capital and risk

- Investment
- Orders
- New Models
- Timing



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# **Natural Gas Forum**

## **Perspectives on Natural Gas Demand**

**Enough already...**

**Let's hear from our guests...**