Meeting the Challenges of the Nation's Growing Natural Gas Demand

PRESENTATION FOR
THE VICE PRESIDENT'S ENERGY POLICY TASK FORCE

U.S. DEPARTMENT OF ENERGY
NATIONAL PETROLEUM COUNCIL

MARCH 27, 2001

Obtained and made public by the Natural Resources Defense Council, March/April 2002
U.S. DEPARTMENT OF ENERGY
NATIONAL PETROLEUM COUNCIL

NATURAL GAS BRIEFING PARTICIPANTS
March 27, 2001

U.S. DEPARTMENT OF ENERGY
Robert S. Kripowicz, Acting Assistant Secretary, Fossil Energy, U.S. Department of Energy

NATIONAL PETROLEUM COUNCIL
Edward J. Gilliard, Senior Advisor, Planning and Acquisitions, Burlington Resources, Inc.
John S. Hull, Director, Energy Market Analysis, Texaco Natural Gas
Paul L. Kelly, Senior Vice President, Rowan Companies, Inc.
Marshall W. Nichols, Executive Director, National Petroleum Council
Thomas B. Nusz, Vice President, Acquisitions, Burlington Resources, Inc.
Blaise N. Poole, Manager, Marketing and Strategy, El Paso Gas Services Company
Bryon S. Wright, Vice President, Strategy, El Paso Corporation
BACKGROUND INFORMATION ON THE NATIONAL PETROLEUM COUNCIL

In May 1946, the President stated in a letter to the Secretary of the Interior that he had been impressed by the contribution made through government/industry cooperation to the success of the World War II petroleum program. He felt that it would be beneficial if this close relationship were to be continued and suggested that the Secretary of the Interior establish an industry organization to advise the Secretary on oil and natural gas matters.

Pursuant to this request, Interior Secretary J. A. Krug established the National Petroleum Council (NPC) on June 18, 1946. In October 1977, the Department of Energy was established and the Council was transferred to the new department.

The purpose of the NPC is solely to advise, inform, and make recommendations to the Secretary of Energy on any matter requested by the Secretary, relating to oil and natural gas or the oil and gas industries. Matters that the Secretary would like to have considered by the Council are submitted in the form of a letter outlining the nature and scope of the study. The Council reserves the right to decide whether it will consider any matter referred to it.

Examples of recent studies undertaken by the NPC at the request of the Secretary include:

- U.S. Arctic Oil & Gas (1981)
- Environmental Conservation - The Oil & Gas Industries (1982)
- Petroleum Inventories and Storage Capacity (1983, 1984)
- The Strategic Petroleum Reserve (1984)
- U.S. Petroleum Refining (1986)
- Factors Affecting U.S. Oil & Gas Outlook (1987)
- Integrating R&D Efforts (1988)
- Petroleum Storage & Transportation (1989)
- Short-Term Petroleum Outlook – An Examination of Issues and Projections (1991)
- Petroleum Refining in the 1990s – Meeting the Challenges of the Clean Air Act (1991)
- The Potential for Natural Gas in the United States (1992)
- U.S. Petroleum Refining – Meeting Requirements for Cleaner Fuels and Refineries (1993)
- The Oil Pollution Act of 1990: Issues and Solutions (1994)
- Marginal Wells (1994)
- Research, Development, and Demonstration Needs of the Oil and Gas Industry (1995)
- Meeting the Challenges of the Nation’s Growing Natural Gas Demand (1999)
- U.S. Petroleum Refining—Assuring the Adequacy and Affordability of Cleaner Fuels (2000).

The NPC does not concern itself with trade practices, nor does it engage in any of the usual trade association activities. The Council is subject to the provisions of the Federal Advisory Committee Act of 1972.

Members of the National Petroleum Council are appointed by the Secretary of Energy and represent all segments of the oil and gas industries and related interests. The NPC is headed by a Chair and a Vice Chair, who are elected by the Council. The Council is supported entirely by voluntary contributions from its members.

2873

DOE006-0230

Obtained and made public by the Natural Resources Defense Council, March/April 2002
NATIONAL PETROLEUM COUNCIL

MEMBERSHIP

2000/2001

Jacob Adams
President
Arctic Slope Regional Corporation

O. Truman Arnold
Chairman of the Board, President
and Chief Executive Officer
Truman Arnold Companies

Robert O. Agbede
President and
Chief Executive Officer
Advanced Technology Systems, Inc.

Ralph E. Bailey
Chairman and
Chief Executive Officer
Xpronet Inc.

George A. Alcorn
President
Alcorn Exploration, Inc.
2000 Post Oak Boulevard

D. Euan Baird
Chairman, President and
Chief Executive Officer
Schlumberger Limited

Benjamin B. Alexander
President
Dasco Energy Corporation

William W. Ballard
President
Ballard Petroleum, L.L.C.

Conrad K. Allen
Vice President
National Association of Black Geologists
and Geophysicists

William J. Barrett
Chairman and
Chief Executive Officer
Barrett Resources Corporation

Robert J. Allison, Jr.
Chairman and
Chief Executive Officer
Anadarko Petroleum Corporation

Gonzalo Barrientos
State Senator
The Senate of
The State of Texas

Robert O. Anderson
Roswell, New Mexico

Michael L. Beatty
Michael L. Beatty & Associates

Philip F. Anschutz
President
The Anschutz Corporation

Riley P. Bechtel
Chairman and
Chief Executive Officer
Bechtel Group, Inc.

Gregory L. Armstrong
President and
Chief Executive Officer
Plains Resources Inc.

David W. Biegler
President and
Chief Operating Officer
TXU

Robert G. Armstrong
President
Armstrong Energy Corporation

Peter I. Bijur
Retired Chairman of the Board
Texaco Inc.

2874

DOE006-0231

Obtained and made public by the Natural Resources Defense Council, March/April 2002
NATIONAL PETROLEUM COUNCIL

M. Frank Bishop
Executive Director
National Association of
State Energy Officials

Carl E. Bolch, Jr.
Chairman and
Chief Executive Officer
Racetrac Petroleum, Inc.

John F. Bookout
Chairman, President and
Chief Executive Officer
Contour Energy Co.

Charles T. Bryan
President and
Chief Executive Officer
DeGolyer and MacNaughton Inc.

Carl Burhanan
President
Oasis Aviation, Inc.

Victor A. Burk
Managing Partner
Global Energy & Utilities
Arthur Andersen, L.L.P.

Frank M. Burke, Jr.
Chairman and
Chief Executive Officer
Burke, Mayborn Company, Ltd.

Charles William Burton
Partner
Jones, Day, Reavis & Pogue

Karl R. Butler
President and
Chief Executive Officer
ICC Energy Corporation

George Campbell, Jr.
President
The Cooper Union for the
Advancement of Science and Art

Philip J. Carroll
Chairman and
Chief Executive Officer
Fluor Corporation

R. D. Cash
Chairman and
Chief Executive Officer
Questar Corporation

Robert B. Catell
Chairman and
Chief Executive Officer
KeySpan Energy

Clarence P. Cazalot, Jr.
President
Marathon Oil Company

Paul W. Chellgren
Chairman of the Board and
Chief Executive Officer
Ashland Inc.

Danny H. Conklin
Partner
Philcon Development Co.

Luke R. Corbett
Chairman and
Chief Executive Officer
Kerr-McGee Corporation

Michael B. Coulson
President
Coulson Oil Co.

Gregory L. Craig
President
Cook Inlet Energy Supply

Hector J. Cuellar
Managing Director
Area/Industries Manager
Bank of America

William A. Custard
President and
Chief Executive Officer
Dallas Production, Inc.

Robert Darbelnet
President and
Chief Executive Officer
AAA

George A. Davidson, Jr.
Retired Chairman
Dominion Resources, Inc.
NATIONAL PETROLEUM COUNCIL

Bruce C. Gottwald
Chairman and
Chief Executive Officer
Ethyl Corporation

S. Diane Graham
Chairman and
Chief Executive Officer
STRATCO, Inc.

Frederic C. Hamilton
Chairman
The Hamilton Companies

Christine Hansen
Executive Director
Interstate Oil and Gas
Compact Commission

Michael F. Harness
President
Osyka Corporation

Angela E. Harrison
Chairman and
Chief Executive Officer
WELSCO, Inc.

Timothy C. Headington
President/Owner
Headington Oil Company

John B. Hess
Chairman of the Board and
Chief Executive Officer
Amerada Hess Corporation

Jack D. Hightower
Chairman of the Board, President
and Chief Executive Officer
Pure Resources, Inc.

Jerry V. Hoffman
Chairman, President and
Chief Executive Officer
Berry Petroleum Company

R. Earl Holding
President and
Chief Executive Officer
Sinclair Oil Corporation

Roy M. Huffington
Chairman of the Board and
Chief Executive Officer
Roy M. Huffington, Inc.

Ray L. Hunt
Chairman of the Board
Hunt Oil Company

James M. Hutchison
President
HUTCO Inc.

Frank J. Jarossi
Chairman and
Chief Executive Officer
American Bureau of Shipping &
Affiliated Companies

Eugene M. Isenberg
Chairman and
Chief Executive Officer
Nabors Industries, Inc.

A. V. Jones, Jr.
Chairman
Van Operating, Ltd.

Jon Rex Jones
Chairman
EnerVest Management Company, L. C.

Jerry D. Jordan
President
Jordan Energy Inc.

Fred C. Julander
President
Julander Energy Company

Robert Kelley
Chairman
Noble Affiliates, Incorporated

Bernard J. Kennedy
Chairman and
Chief Executive Officer
National Fuel Gas Company

Richard D. Kinder
Chairman and
Chief Executive Officer
Kinder Morgan Energy Partners, L.P.
<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Company/Corporation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark E. Monroe</td>
<td>President and Chief Executive Officer</td>
<td>Louis Dreyfus Natural Gas</td>
</tr>
<tr>
<td>Herman Morris, Jr.</td>
<td>President and Chief Executive Officer</td>
<td>Memphis Light, Gas &amp; Water Division</td>
</tr>
<tr>
<td>James J. Mulva</td>
<td>Chairman of the Board and Chief Executive Officer</td>
<td>Phillips Petroleum Company</td>
</tr>
<tr>
<td>John Thomas Munro</td>
<td>President</td>
<td>Munro Petroleum &amp; Terminal Corporation</td>
</tr>
<tr>
<td>Mark B. Murphy</td>
<td>President</td>
<td>Strata Production Company</td>
</tr>
<tr>
<td>Gary L. Neale</td>
<td>Chairman, President and Chief Executive Officer</td>
<td>NiSource Inc.</td>
</tr>
<tr>
<td>J. Larry Nichols</td>
<td>President and Chief Executive Officer</td>
<td>Devon Energy Corporation</td>
</tr>
<tr>
<td>René O. Oliveira</td>
<td>State Representative</td>
<td>The House of Representatives of The State of Texas</td>
</tr>
<tr>
<td>David J. O'Reilly</td>
<td>Chairman of the Board and Chief Executive Officer</td>
<td>Chevron Corporation</td>
</tr>
<tr>
<td>C. R. Palmer</td>
<td>Chairman of the Board, President and Chief Executive Officer</td>
<td>Rowan Companies, Inc.</td>
</tr>
<tr>
<td>Mark G. Papa</td>
<td>Chairman and Chief Executive Officer</td>
<td>EOG Resources, Inc.</td>
</tr>
<tr>
<td>Paul H. Parker</td>
<td>Vice President</td>
<td>Center for Resource Management</td>
</tr>
<tr>
<td>Robert L. Parker, Sr.</td>
<td>Chairman of the Board</td>
<td>Parker Drilling Company</td>
</tr>
<tr>
<td>Howard Paver</td>
<td>President and General Manager</td>
<td>BHP Petroleum (Americas) Inc.</td>
</tr>
<tr>
<td>L. Frank Pitts</td>
<td>Owner</td>
<td>Pitts Energy Group</td>
</tr>
<tr>
<td>Richard B. Priory</td>
<td>Chairman and Chief Executive Officer</td>
<td>Duke Energy Corporation</td>
</tr>
<tr>
<td>Caroline Quinn</td>
<td>President</td>
<td>Farrar Oil Company</td>
</tr>
<tr>
<td>Daniel Rappaport</td>
<td>Chairman of the Board</td>
<td>New York Mercantile Exchange</td>
</tr>
<tr>
<td>Edward B. Rasmuson</td>
<td>Chairman of the Board and Chief Executive Officer</td>
<td>National Bank of Alaska</td>
</tr>
<tr>
<td>Lee R. Raymond</td>
<td>Chairman, President and Chief Executive Officer</td>
<td>Exxon Mobil Corporation</td>
</tr>
<tr>
<td>John G. Rice</td>
<td>President and Chief Executive Officer</td>
<td>GE Power Systems</td>
</tr>
<tr>
<td>Corbin J. Robertson, Jr.</td>
<td>President</td>
<td>Quintana Minerals Corporation</td>
</tr>
<tr>
<td>Robert E. Rose</td>
<td>Chairman, President and Chief Executive Officer</td>
<td>Global Marine Inc.</td>
</tr>
</tbody>
</table>

Obtained and made public by the Natural Resources Defense Council, March/April 2002
NA
ATIONAL
PETROLEUM
COUNCIL

Henry A. Rosenberg, Jr.
Chairman of the Board and
Chief Executive Officer
Crown Central Petroleum Corporation

A. R. Sanchez, Jr.
Chairman of the Board and
Chief Executive Officer
Sanchez-O’Brien Oil and Gas Corporation

Robert Santistevan
Director
Southern Ute Indian Tribe
Growth Fund

S. Scott Sewell
President
Delta Energy Management, Inc.

Bobby S. Shackouls
Chairman, President and
Chief Executive Officer
Burlington Resources

Donald M. Simmons
President
Simmons Royalty Company

Matthew R. Simmons
President
Simmons and Company International

Arlie M. Skov
President
Arlie M. Skov, Inc.

Arthur L. Smith
Chairman
John S. Herold, Inc.

Bruce A. Smith
Chairman, President and
Chief Executive Officer
Tesor Oil Corporation

Joel V. Staff
Chairman and
Chief Executive Officer
National-Oilwell, Inc.

Charles C. Stephenson, Jr.
Chairman of the Board
Vintage Petroleum, Inc.

James H. Stone
Chairman of the Board
Stone Energy Corporation

Carroll W. Suggs
Chairman of the Board, President
and Chief Executive Officer
Petroleum Helicopters, Inc.

Patrick F. Taylor
Chairman and
Chief Executive Officer
Taylor Energy Company

Richard E. Terry
Chairman and
Chief Executive Officer
Peoples Energy Corporation

Gerald Torres
Associate Dean for Academic Affairs
University of Texas School of Law and
Vice Provost
University of Texas at Austin

H. A. True, III
Partner
True Oil Company

Randy E. Velarde
President
The Plaza Group

Thurman Velarde
Administrator
Oil and Gas Administration
Jicarilla Apache Tribe

Philip K. Verleger, Jr.
PK Verleger, L.L.C.

Joseph C. Walter, III
President
Walter Oil & Gas Corporation

L. O. Ward
Owner-President
Ward Petroleum Corporation

C. L. Watson
Chairman of the Board and
Chief Executive Officer
Dyneugy Inc.
NATIONAL PETROLEUM COUNCIL

Michael E. Wiley
Chairman, President and
Chief Executive Officer
Baker Hughes Incorporated

Bruce W. Wilkinson
Chairman of the Board and
Chief Executive Officer
McDermott International, Inc.

Mary Jane Wilson
President and
Chief Executive Officer
WZI Inc.

Irene S. Wischer
President and
Chief Executive Officer
Panhandle Producing Company

Brion G. Wise
Chairman and
Chief Executive Officer
Western Gas Resources, Inc.

William A. Wise
Chairman, President and
Chief Executive Officer
El Paso Energy Corporation

George M. Yates
President and
Chief Executive Officer
Harvey E. Yates Company

John A. Yates
President
Yates Petroleum Corporation

Daniel H. Yergin
President
Cambridge Energy Research Associates

Henry Zarrow
Vice Chairman
Sooner Pipe & Supply Corporation
Meeting the Challenges of the Nation's Growing Natural Gas Demand

PRESENTATION FOR
THE VICE PRESIDENT'S ENERGY POLICY TASK FORCE
U.S. DEPARTMENT OF ENERGY
NATIONAL PETROLEUM COUNCIL

MARCH 27, 2001
OVERVIEW

- Introductions
- NPC Background
  - 1992 NPC Report
  - 1999 NPC Report
- 2001 DOE Workshop
  - 23+ TCF in 2000
  - 1999 NPC Report still valid
  - Short-term trends confirm urgency of addressing critical factors and recommendations
U.S. Natural Gas Demand: Comparison of 1992 and 1999 NPC Reports

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Growth in Reference Case Demand (1998-2010)

Distribution of 7 TCF Increase by Sector

1999 NPC Report

Electricity Generation 47%
Industrial 23%
Commercial 11%
Residential 19%

- Natural gas can make an important contribution to the Nation's energy portfolio
- Reliability is key -- 14 million new customers by 2015
- Conservation and energy efficiency still needed

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Factors Behind Increased Gas Demand

2001 DOE Workshop

Faster GDP Growth

(2000)

Increased Gas/Oil-Fired Electric Power Capacity

(1998-2000)

Annual GDP Growth

Actual

NPC 1999 Study

+5.0%

+2.5%

Installed Capacity (GW)

Actual

NPC 1999 Study

38 GW

30 GW

Natural gas for electricity -- 4 years ahead of NPC projection

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Actual vs. Expected Sources of Natural Gas Supply (2000)

2001 DOE Workshop

Domestic Supply (Tcf)

<table>
<thead>
<tr>
<th></th>
<th>Actual</th>
<th>NPC 1999 Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Production</td>
<td>19.1</td>
<td></td>
</tr>
<tr>
<td>Net Imports</td>
<td>3.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Withdrawals From Storage</td>
<td>0.8</td>
<td>0.1</td>
</tr>
</tbody>
</table>

Source: EIA

Obtained and made public by the Natural Resources Defense Council, March/April 2002
U.S. Lower-48 Natural Gas Resource Base Estimates

1999 NPC Report

<table>
<thead>
<tr>
<th>Total Resource Base (TCF)</th>
<th>1,465</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proven Reserves</td>
<td>157</td>
</tr>
<tr>
<td><strong>Total Unproven Resource Base</strong></td>
<td></td>
</tr>
<tr>
<td>Exploitation of Existing Fields</td>
<td>305</td>
</tr>
<tr>
<td>New Fields to be Discovered</td>
<td>633</td>
</tr>
<tr>
<td>Nonconventional Sources (Coalbed Methane, Tight Gas, Shale)</td>
<td>371</td>
</tr>
</tbody>
</table>

Known with some level of certainty.

Requires:
- Additional drilling
- Technology evolution
- Accessibility

Entails a higher degree of risk.
Growth in Reference Case Supply (1998-2010)

Distribution of 7 TCF Increase by Source

1999 NPC Report

- Gulf of Mexico: 33%
- Rockies: 14%
- S.Ark./N.La./E.Texas: 13%
- Net imports from Canada: 11%
- LNG imports: 6%
- All other areas: 23%

Obtained and made public by the Natural Resources Defense Council, March/April 2002
CRITICAL FACTORS

1999 NPC Report

- Access
- Technology
- Financial Requirements
- Skilled Workers
- Rigs
- Lead Times
- Requirements of New Customers
UPDATE ON CRITICAL FACTORS +/-
2001 DOE Workshop

Access
- Forest Service Roadless Policy (- 7 TCF)
- Sale 181 (- 9 TCF)
- Destin Dome (- 2 or more TCF)
- OCS Bright Spots
- Transmission and Distribution (siting constraints)

Technology
- Smaller Footprint, More Efficient -- recent downward trend (+/-)
- Reduced R&D Expenditures by Producers
- Unique Needs of Independent Producers -- 73% of U.S. production

Capital / Infrastructure
- Rigs and Skilled Workers in Short Supply
- $1.5 Trillion Through 2015 -- includes $781B for capital investments
UPDATE ON CRITICAL FACTORS +/-

2001 DOE Workshop

Lead Times / Regulatory Climate
- Expedited Permitting -- further progress needed, onshore and offshore
- Transmission and Distribution Pipelines -- 300,000 new miles still needed by 2015 with related permits/approvals

Changing Customer Needs
- New Pipelines to Reach Supplies in Frontier Areas
- Expansion of Existing Pipelines to Meet Regional Demand
- New Laterals to Serve Electricity Plants
- Unique Service Requirements
Government Lands
Natural Gas Demand will Increase in All Regions
(1999 NPC Reference Case)

2015 Percent increase
1999 Gas Demand

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Impact of Size of Resource Base and Access on U.S. Natural Gas Production

1909 NPC Report

Increased access and a larger resource base are closely linked.
Increased access and a larger resource base are closely linked.
ACCESS ISSUES FOR TRANSMISSION AND DISTRIBUTION

1999 NPC Report

- Acquisition of Right-of-Way on Public Lands
- Encroachment on Existing Right-of-Way
- Increasing Community Awareness and Resistance to New Infrastructure
- More Restrictive Permitting Driven by Environmental Concerns

Obtained and made public by the Natural Resources Defense Council, March/April 2002
GAS PRODUCER PROFILE
1998 U.S. Natural Gas Production

- Small independents: 54%
- Majors: 27%
- Large independents: 19%

Burden for Natural Gas Production Falls Primarily on Independents

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Capital Required for Expansion
1999 NPC Report

OIL & GAS E&P
GAS TRANSMISSION
GAS DISTRIBUTION

Because "associated" natural gas is produced with oil, expenditures for oil and gas have not been separated.

Obtained and made public by the Natural Resources Defense Council, March/April 2002
RECOMMENDATIONS
1999 NPC Report

Establish a Strategy — at the Highest Level — for Natural Gas in the Nation's Energy Portfolio

Form a White House Interagency Work Group

Establish a Balanced, Long-Term Approach for Responsibly Developing the Nation's Resource Base

Assess Impact of Existing Restrictions
Prioritize Restricted Areas
Develop Supply in Selected Areas
Plan for Long-Term Sustainability
OTHER RECOMMENDATIONS
1999 NPC Report

- Drive Research and Technology Development at a Rapid Rate
- Plan for Capital, Infrastructure, and Human Resource Needs
- Streamline Processes that Impact Gas Development
- Assess the Impact of Environmental Regulation on Natural Gas Demand and Supply
- Design New Services to Meet Changing Customer Needs
POTENTIAL ENERGY POLICY ACTIONS

- Institutionalize interagency coordination (building on work of Vice President's Energy Task Force)
- Establish a Strategic Plan for Natural Gas
- Review existing and proposed regulations and policies that may impact natural gas supply (Energy Policy Directive)
- Increase access to resources and rights-of-way (Federal Lands Inventory, Sale 191, Destin Dome, OCS Bright Spots)
  (Regional Supply for Regional Demand)
- Streamline permitting and approval processes for supply and transmission and distribution (including NEPA decisions, applications for permits to drill on Federal lands, and Coastal Zone Management Act reviews)
- Consult with States (maintaining a national perspective)
- Maintain view of North American gas market and international sources of supply
- Encourage technology development
- Evaluate royalty relief and other financial incentives (onshore, offshore, and infrastructure)
- Monitor progress on the 7 critical factors
Historical Lease Activity - GOM

- 600' Water Depth
- Number of High Bids/Central
- Number of High Bids/Western
- Oil Price

- $40
- $35
- $30
- $25
- $20
- $15
- $10
- $5
- $0

Number of bids:
- 750
- 700
- 660
- 650
- 600
- 550
- 500
- 450
- 400
- 350
- 300
- 250
- 200
- 150
- 100
- 50
- 5
- 0

Events:
- 1974 Oil Embargo
- 1979 Cognac
- 1984 Bullwinkle Mars
- 1989 $25 miniacre (Auger)
- 1994 Mahogany
- 1999 Neptune
- 1999 Deepwater Royalty Relief

Obtained and made public by the Natural Resources Defense Council, March/April 2002
Domestic Natural Gas Production for 2000 is Below Expectations, Except Unconventional Gas

<table>
<thead>
<tr>
<th></th>
<th>Actual</th>
<th>NPC 1999 Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Domestic Production</td>
<td>19.1</td>
<td>19.9</td>
</tr>
<tr>
<td>Onshore Conventional/Other</td>
<td>8.7</td>
<td>9.4</td>
</tr>
<tr>
<td>GOM Offshore</td>
<td>5.3</td>
<td>5.7</td>
</tr>
<tr>
<td>Unconventional Gas</td>
<td>5.1</td>
<td>4.8</td>
</tr>
</tbody>
</table>

Obtained and made public by the Natural Resources Defense Council, March/April 2002
GROWING U.S. NATURAL GAS DEMAND

1992 Report
- 19 TCF (1990)

1999 Report
- 22 TCF (1998)
- 23+ TCF (2000)
- 29 TCF (2010)
- 31 TCF (2015)

2001 Department of Energy Workshop
- 1999 NPC Report still valid
- Short-term trends confirm urgency of addressing critical factors and recommendations