

First Annual North American Energy Forum: Energy Infrastructure Futures



For

Woodrow Wilson Center

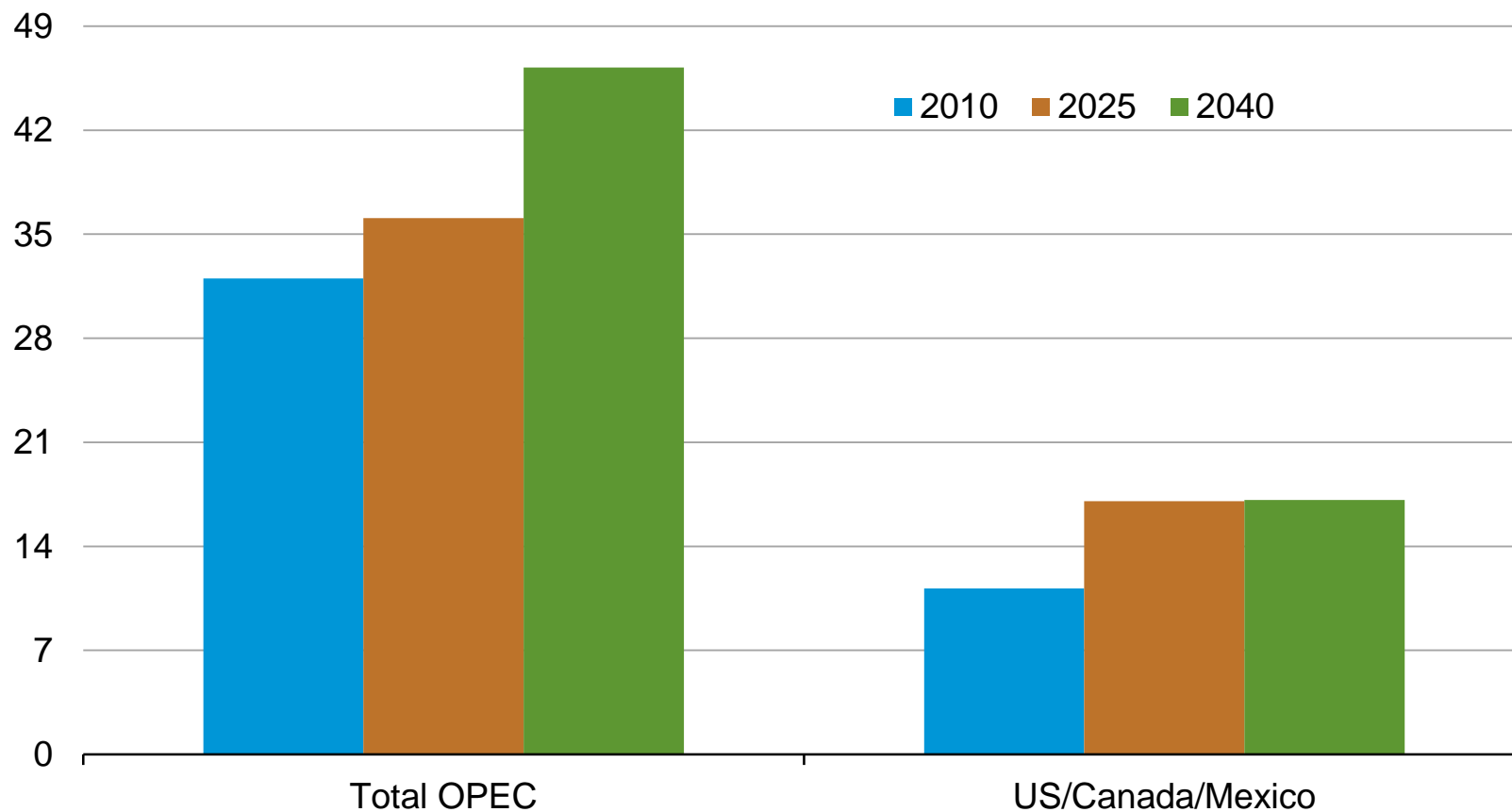
November 19, 2014 / Washington, D.C.

By Shirley Neff

Energy Information Administration

Near-term growth of crude and condensate production in North America is greater than growth for all OPEC countries by 2025

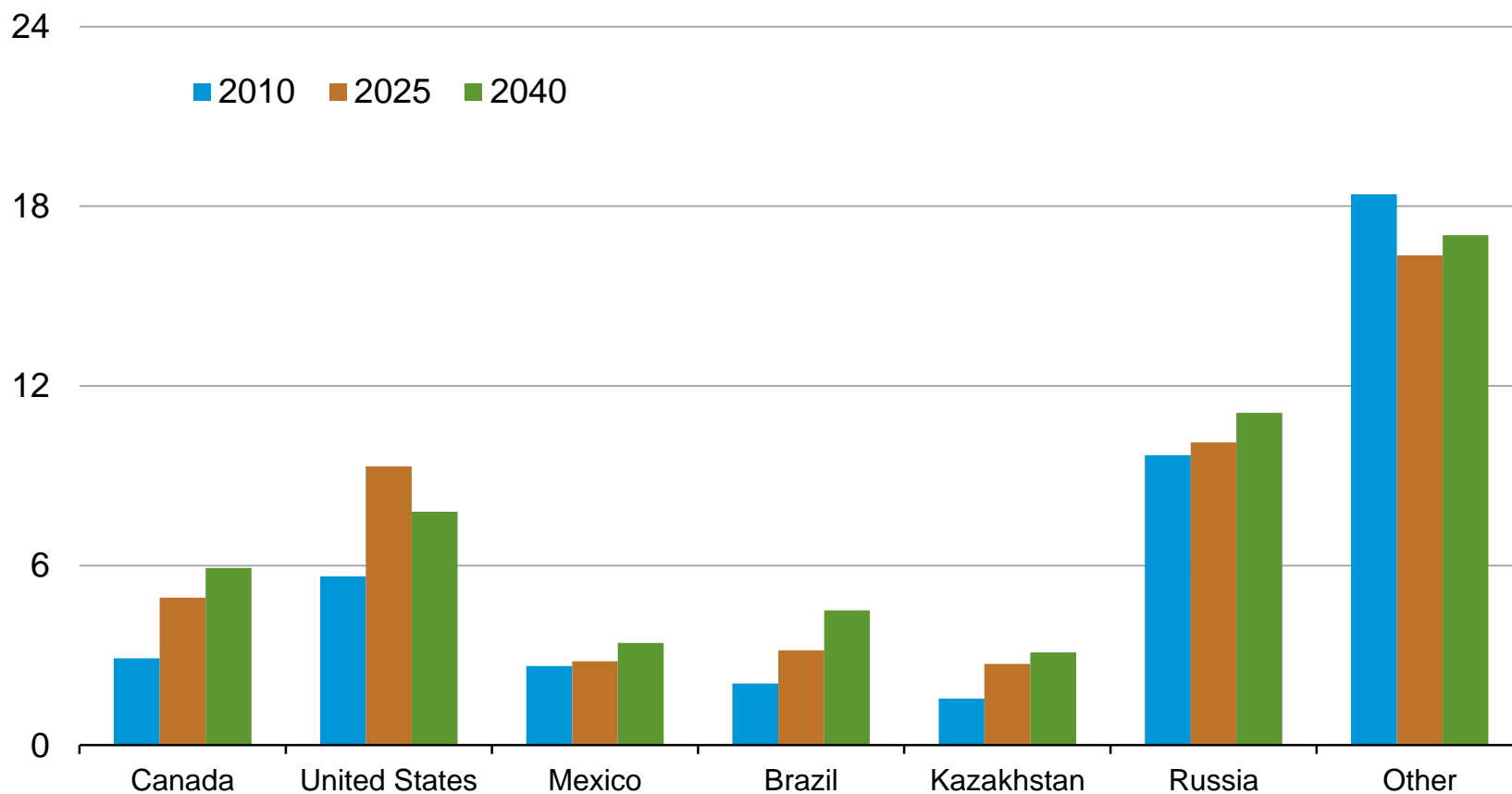
OPEC crude and lease condensate production by region, Reference case
million barrels per day



Source: EIA, International Energy Outlook 2014

Most significant contributors to non-OPEC crude and lease condensate production

non-OPEC crude and lease condensate production, Reference case
million barrels per day

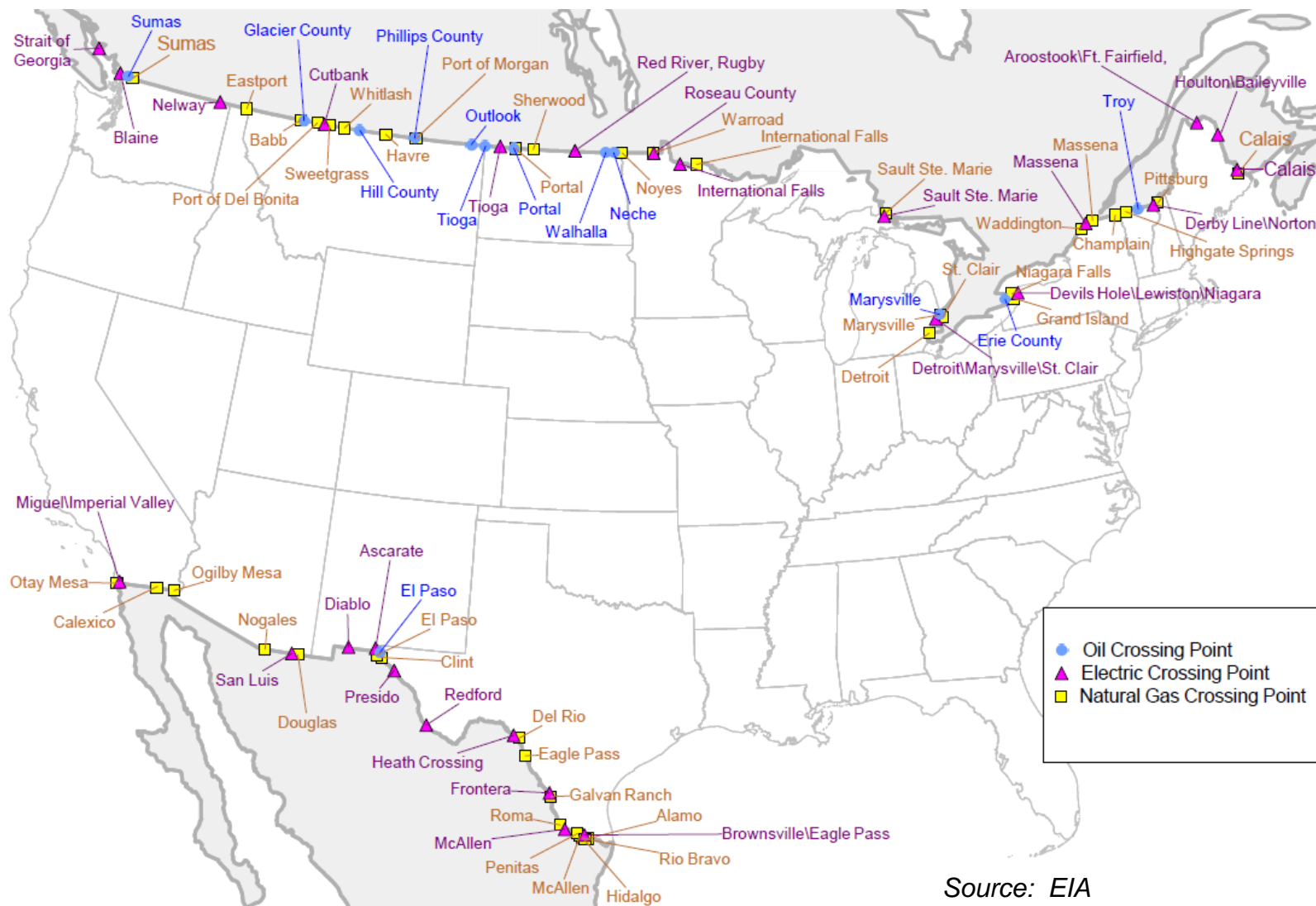


Source: EIA, International Energy Outlook 2014

North American shale plays (as of May 2011)



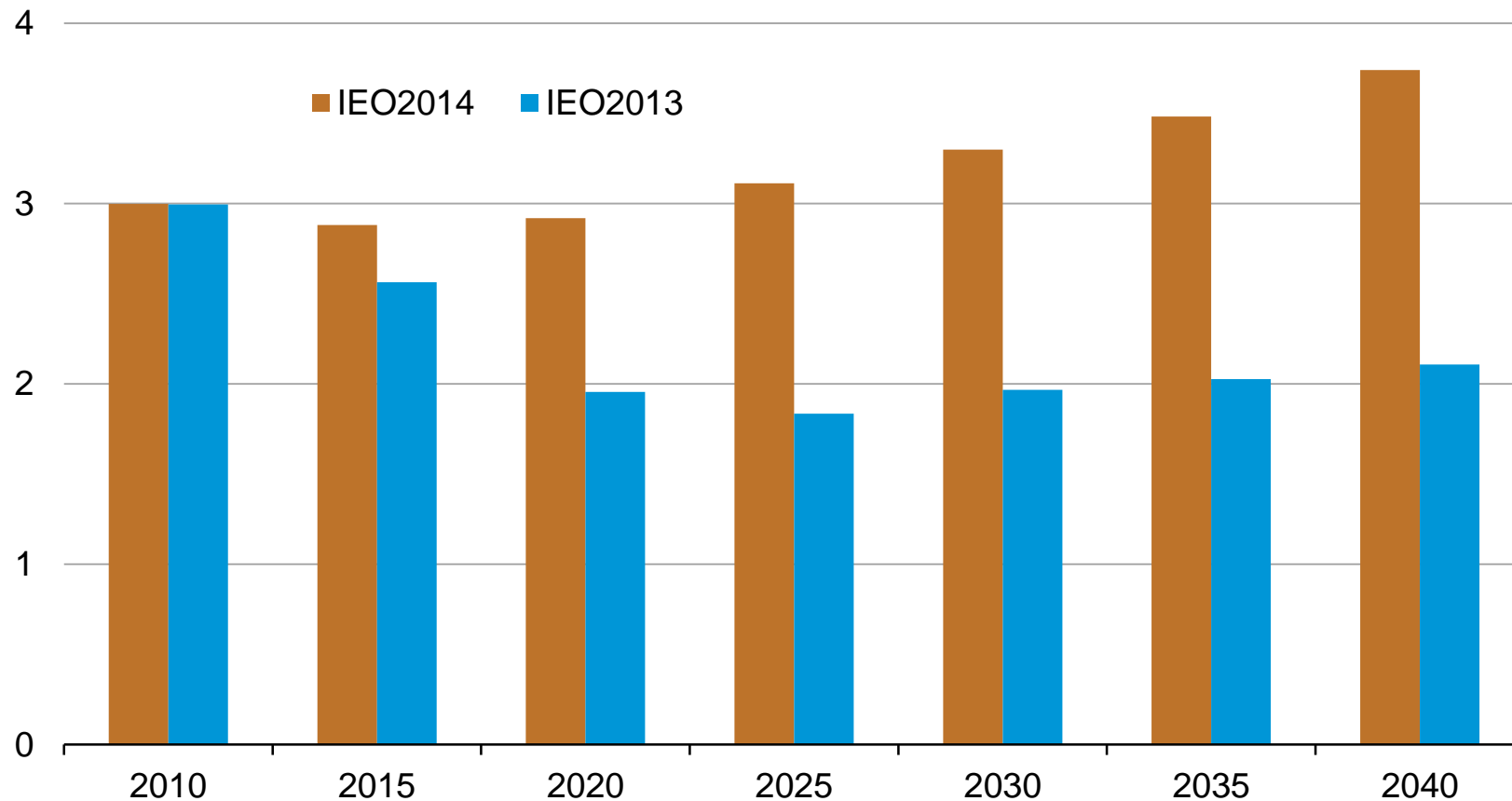
North American border crossing points for oil, natural gas, and electricity



Source: EIA

EIA is cautiously optimistic in our revised Mexican liquids production outlook given the legislative changes underway

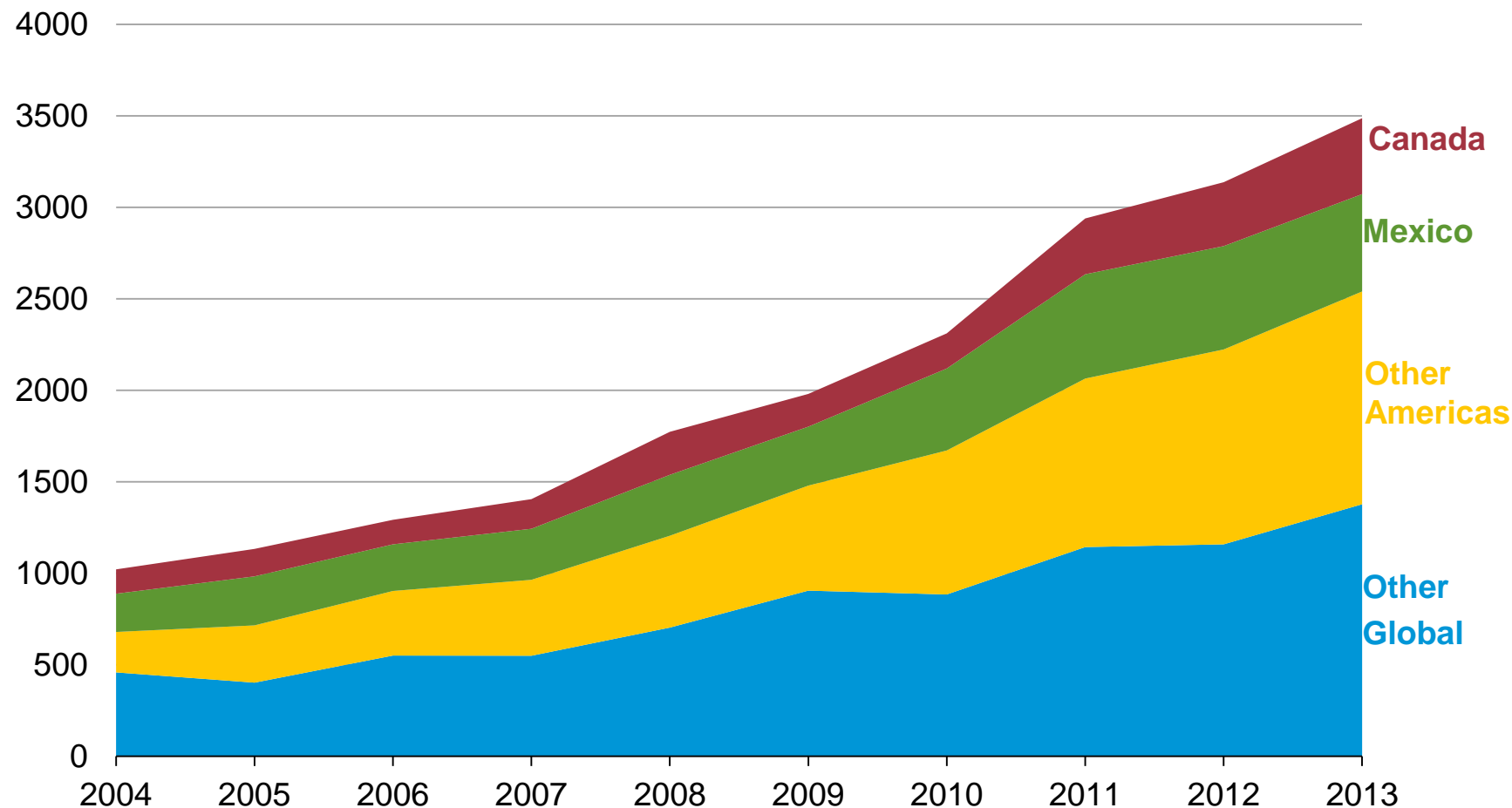
Mexican liquid fuels production, IEO2014 and IEO2013
million barrels per day



Source: EIA, IEO2014 and IEO2013

Over 60% of U.S. petroleum product exports go to the Americas, with Mexico and Canada as its largest global trading partners

U.S. petroleum product gross exports
million barrels per day

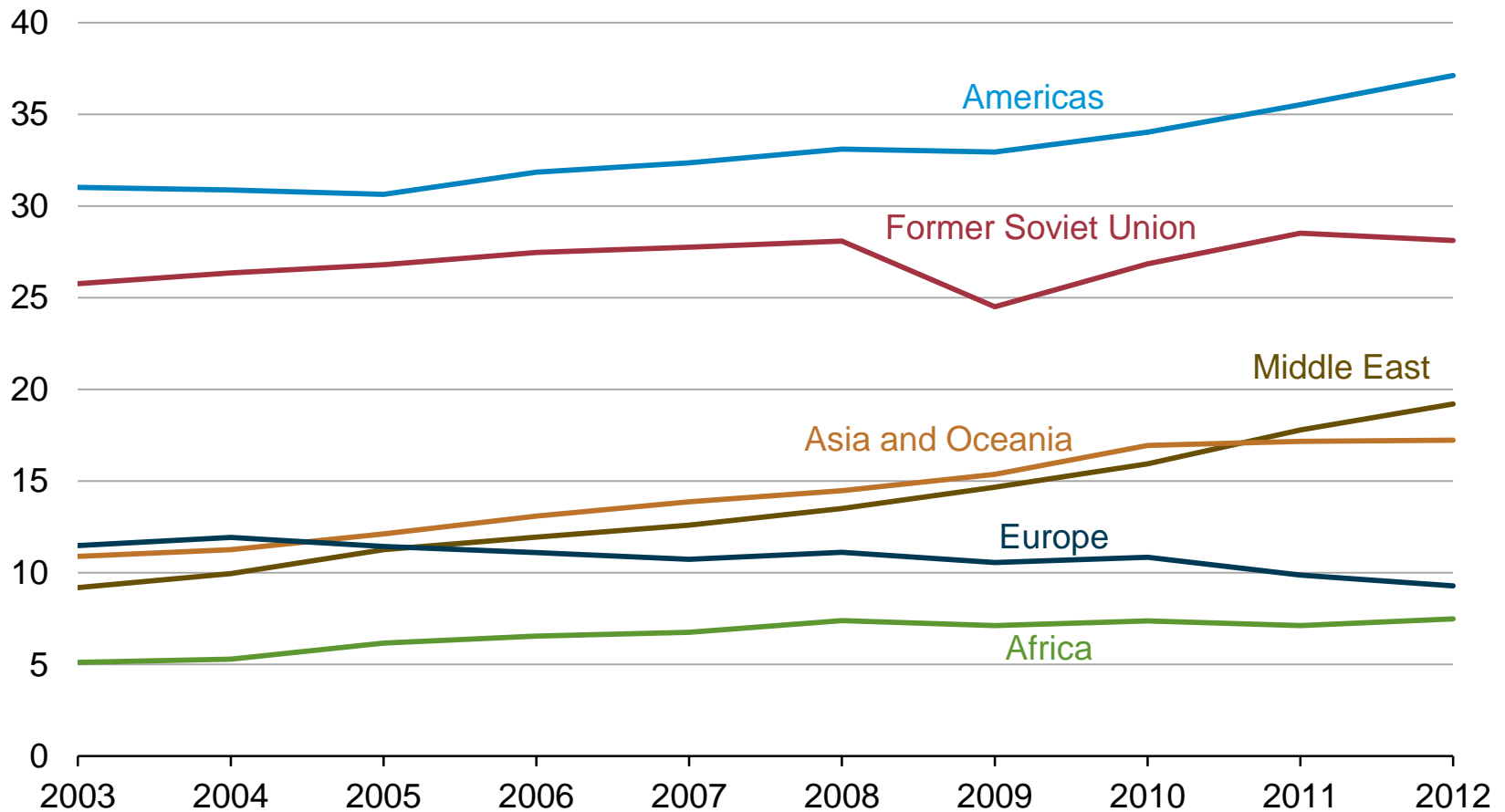


Source: EIA Americas Report

Americas natural gas production is pulling away from other regions

dry natural gas production by region

trillion cubic feet



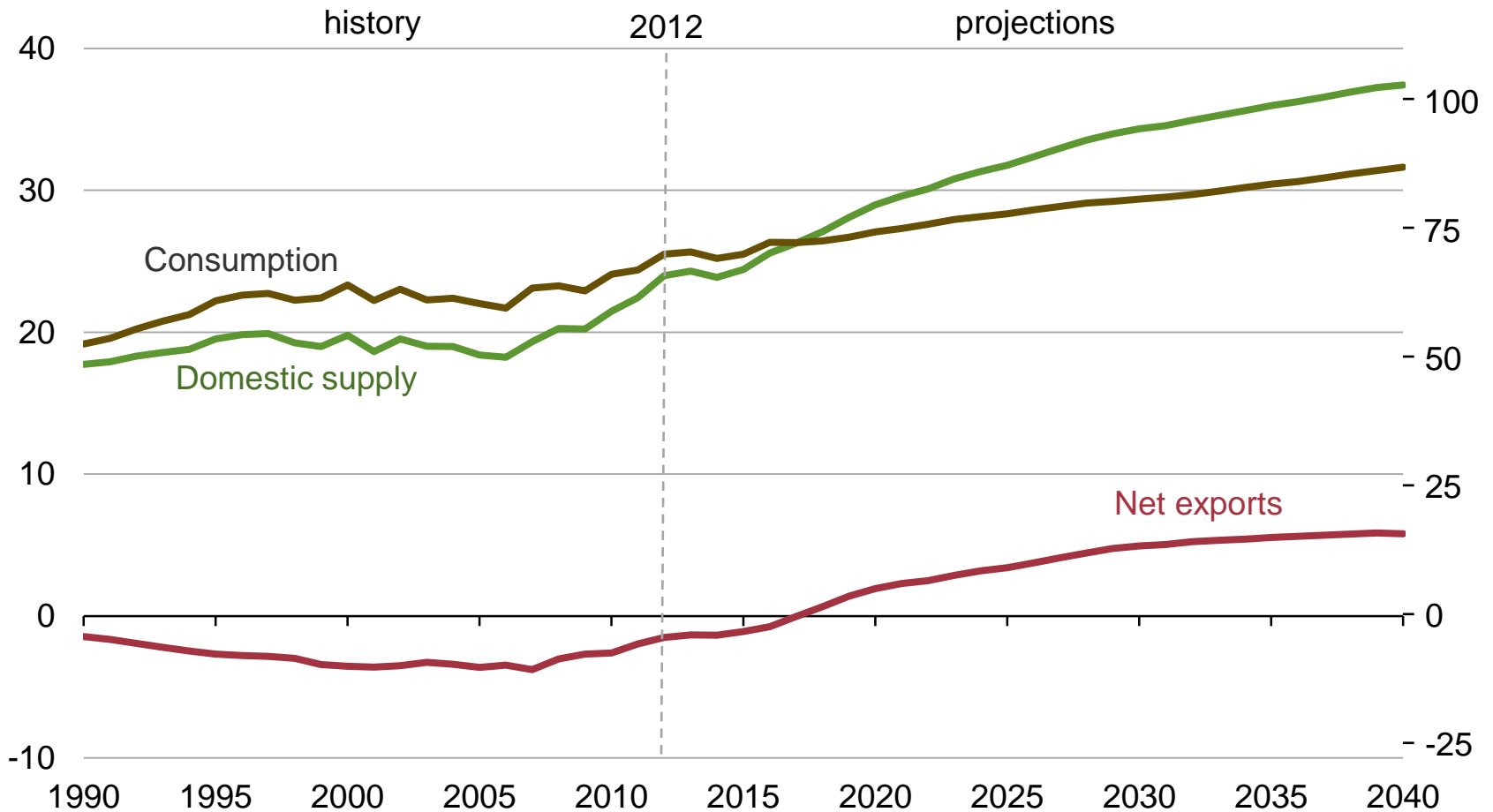
Source: EIA, International Energy Statistics

U.S. becomes a net exporter of natural gas in the near future

U.S. dry natural gas

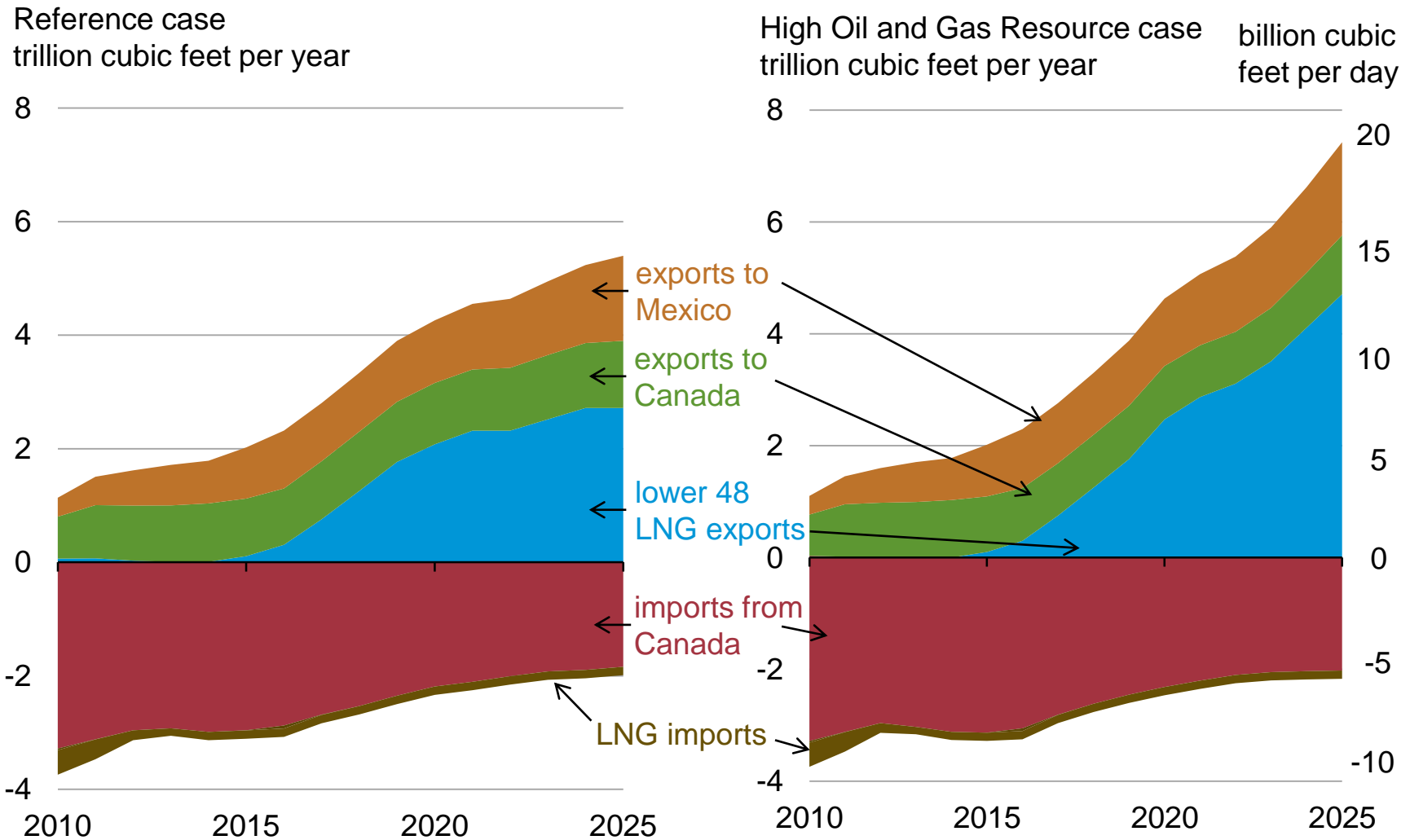
trillion cubic feet per year

billion cubic feet per day



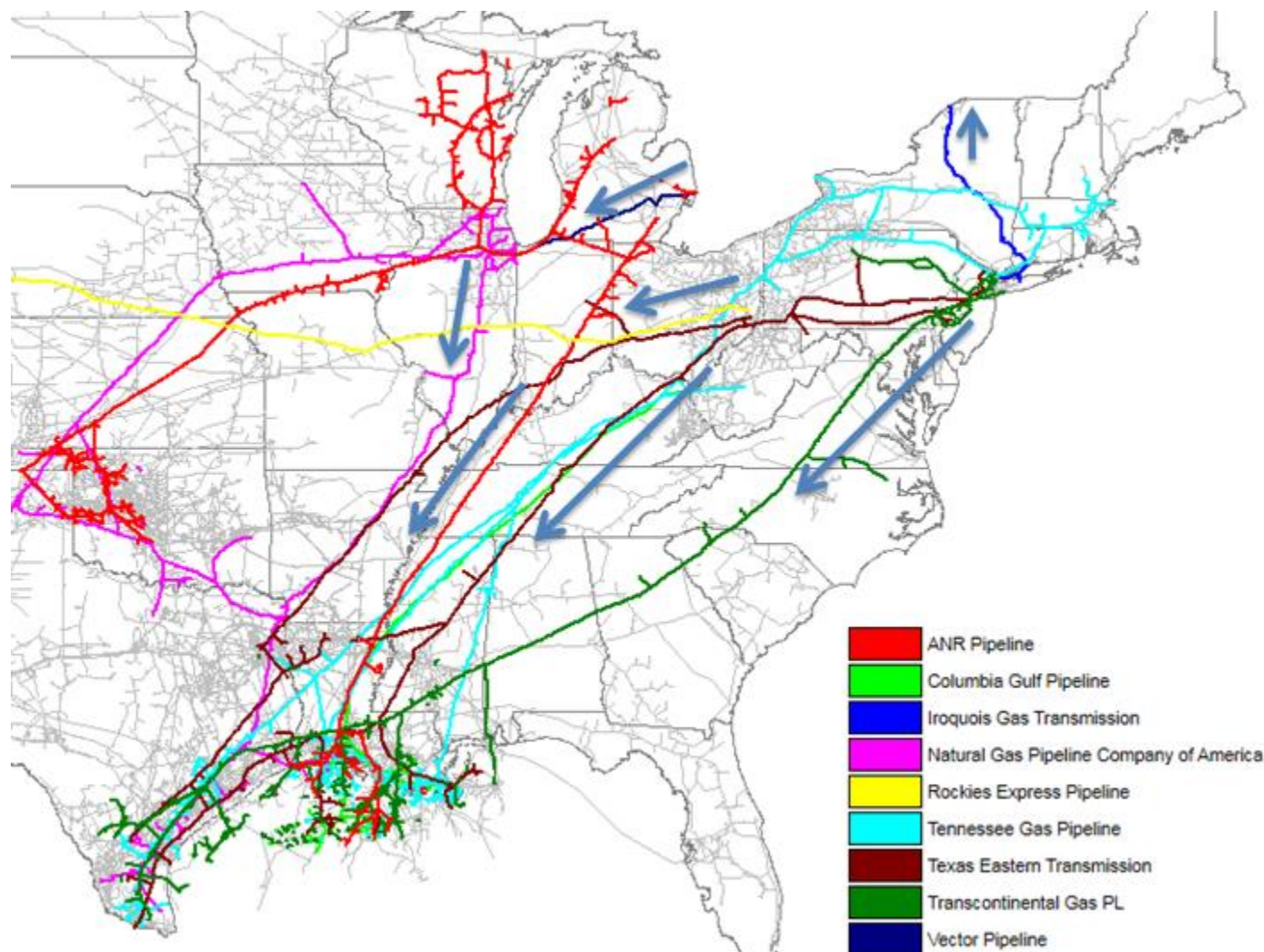
Source: EIA, Annual Energy Outlook 2014 Reference case

Projected U.S. natural gas trade depends on assumptions regarding resources and future technology advances



Source: EIA, Annual Energy Outlook 2014, Reference case and High Oil and Gas Resource case

Recent and planned pipeline reversals reflect high levels of natural gas production in the Northeast



Most liquefaction projects are in North America and will increase the region's total capacity 8-fold by 2019



- Liquefaction, operating
- Liquefaction, construction
- Liquefaction, engineering
- Regasification, operating
- Regasification, construction

Source: IHS EDIN

Note: Displays larger import/export facilities only

Liquefaction (bcf/d)

Country	Operating	Construction	Engineering
Peru	0.6		
Trinidad and Tobago	2.0		
Colombia		0.1	
United States		1.2	13.1
Brazil			0.4
Canada			3.3
Total	2.6	1.3	16.8

Regasification (bcf/d)

Country	Operating	Construction	Engineering
Argentina	0.9		
Brazil	1.2	0.8	
Canada	1.0		
Chile	0.6		
Dominican Republic	0.2		
Mexico	2.3		
Puerto Rico	0.4		
United States	10.2		
Total	16.8	0.8	0

By 2016, the Panama Canal will be open to most LNG carriers

- The Panama Canal and the Trans-Panama Pipeline are not currently used for significant volumes of petroleum trade and no LNG trade
- The Panama Canal expansion project will open the canal route to Aframax tankers and 80% of the current global LNG carrier fleet,
- By 2019, liquefaction capacity in the Americas is expected to increase eight-fold, with most of the projects in the United States
- EIA anticipates increased LNG trade between countries in the Americas, but traffic from the Americas to Asia (the largest LNG import market) through the Panama Canal will also increase

For more information

U.S. Energy Information Administration home page | www.eia.gov

Annual Energy Outlook | www.eia.gov/aeo

Short-Term Energy Outlook | www.eia.gov/steo

International Energy Outlook | www.eia.gov/ieo

Monthly Energy Review | www.eia.gov/mer

Today in Energy | www.eia.gov/todayinenergy

State Energy Portal | www.eia.gov/state

Drilling Productivity Report | www.eia.gov/petroleum/drilling/