



# Energy Summit 2004

**Louisiana State University  
Baton Rouge**

***North American Gas Dynamics***

**October 21, 2004**

**Paul Ziff, CEO  
Ziff Energy Group**

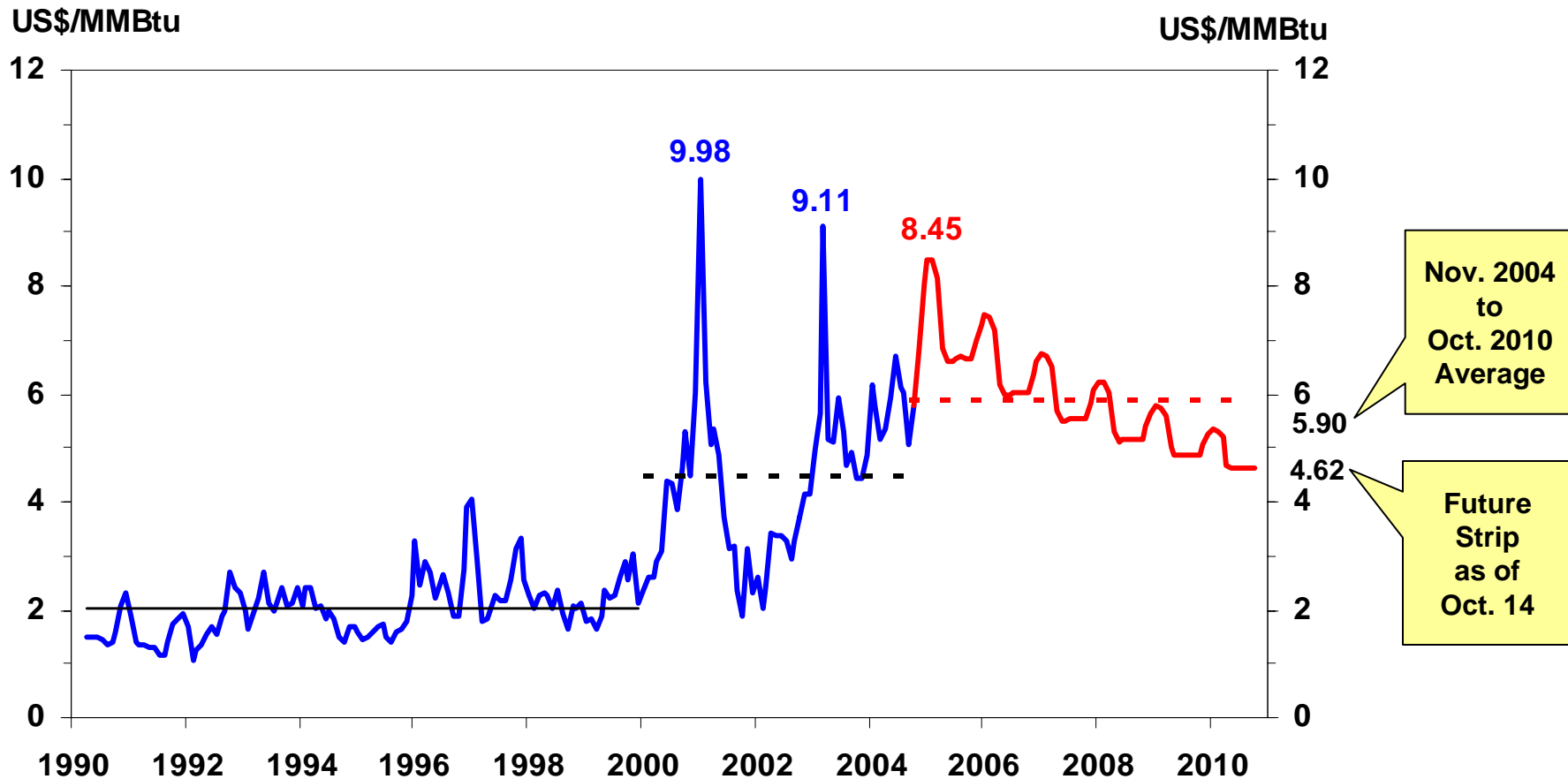
**Houston**

**Calgary**

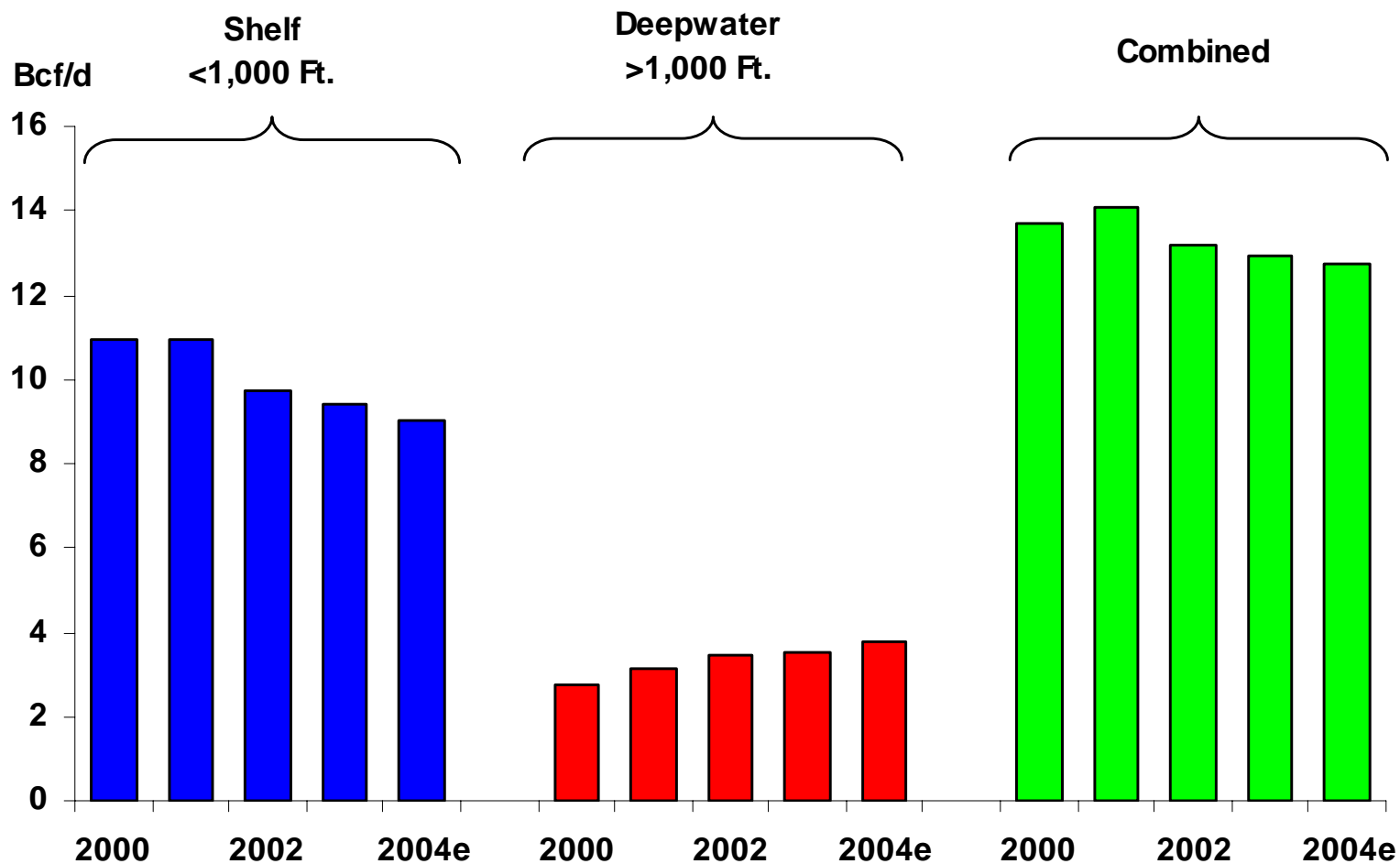
# North American Gas Supply



# Natural Gas Price Outlook

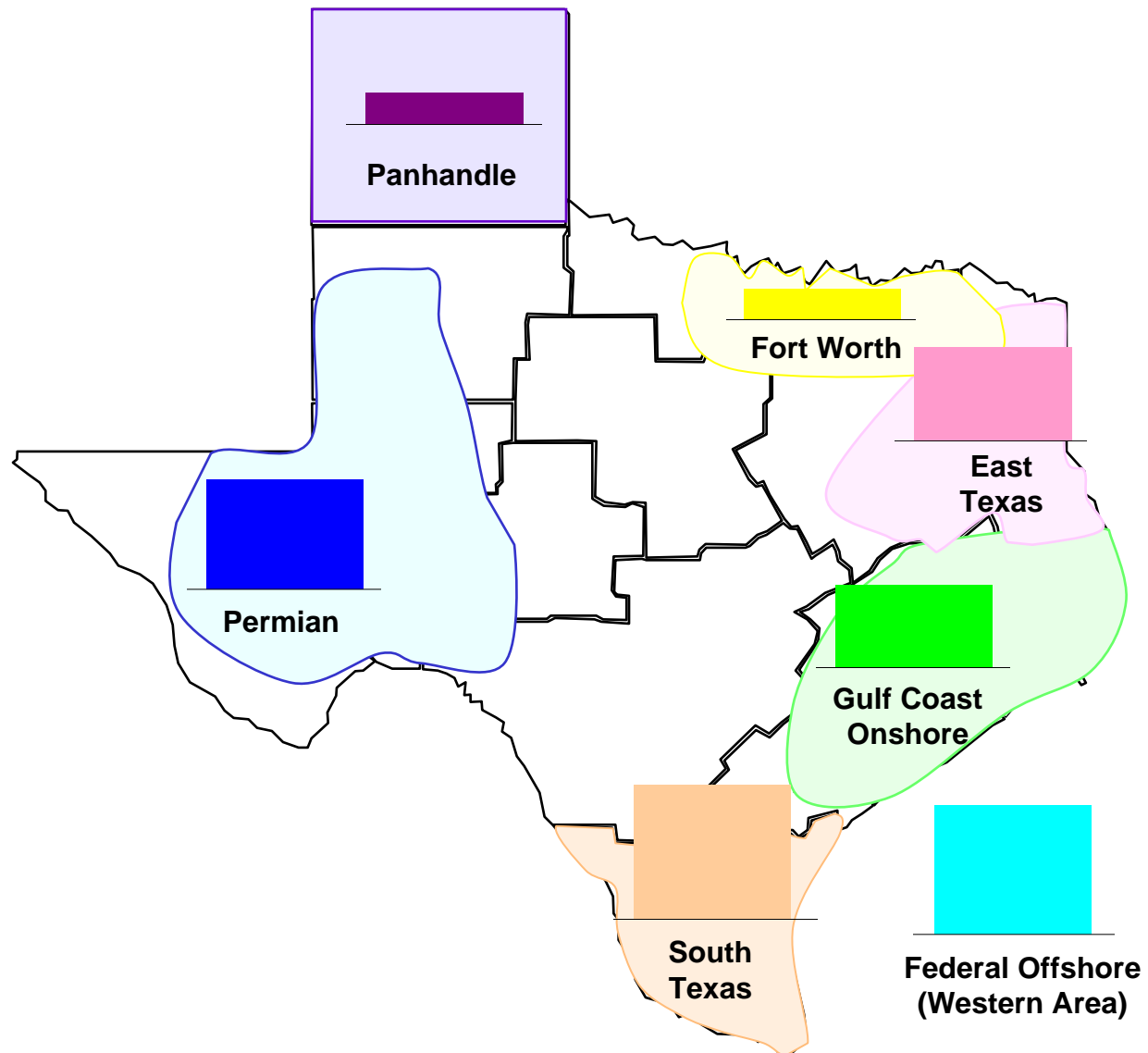


# Gulf of Mexico Gas Production

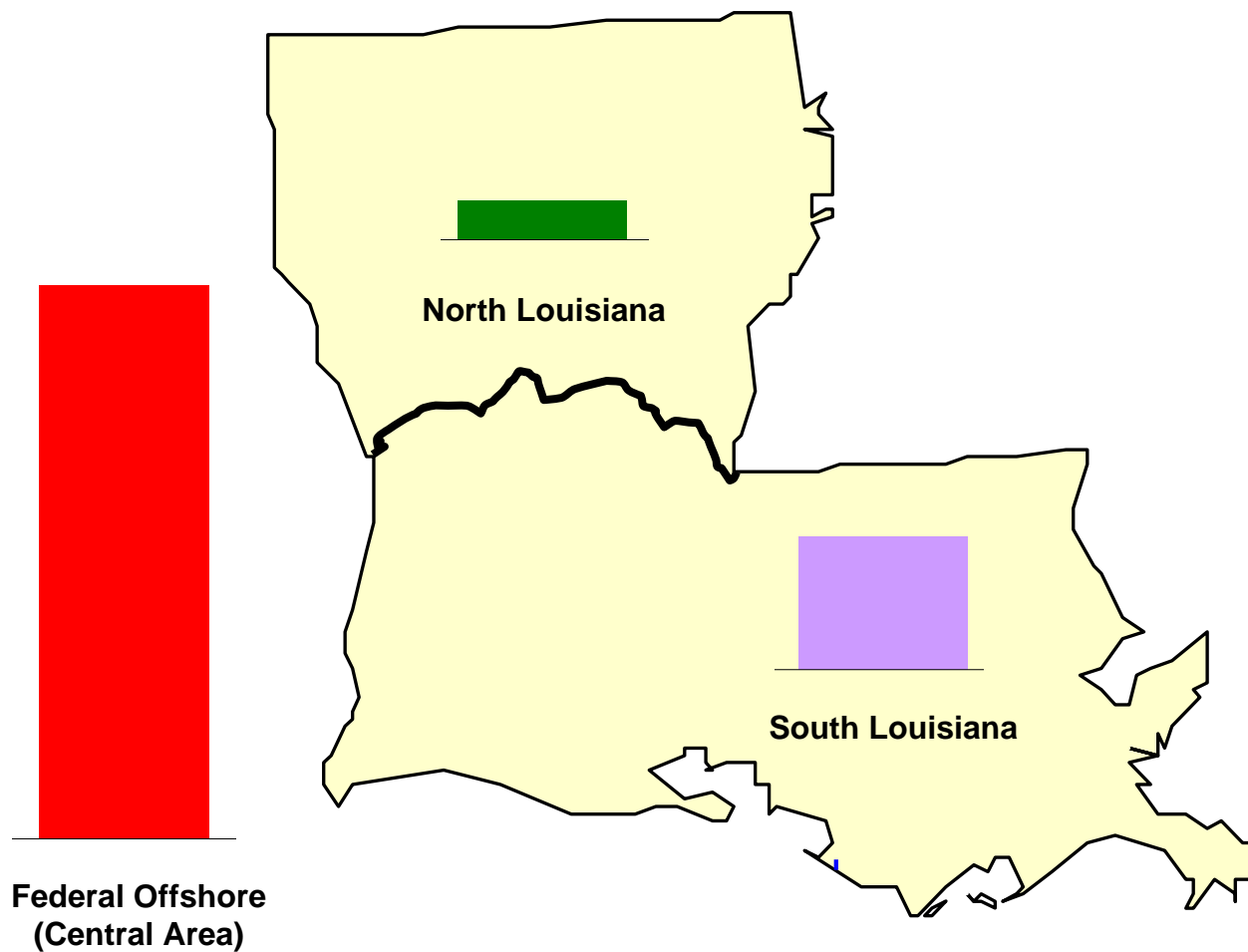


Source: EIA, MMS, Ziff Energy

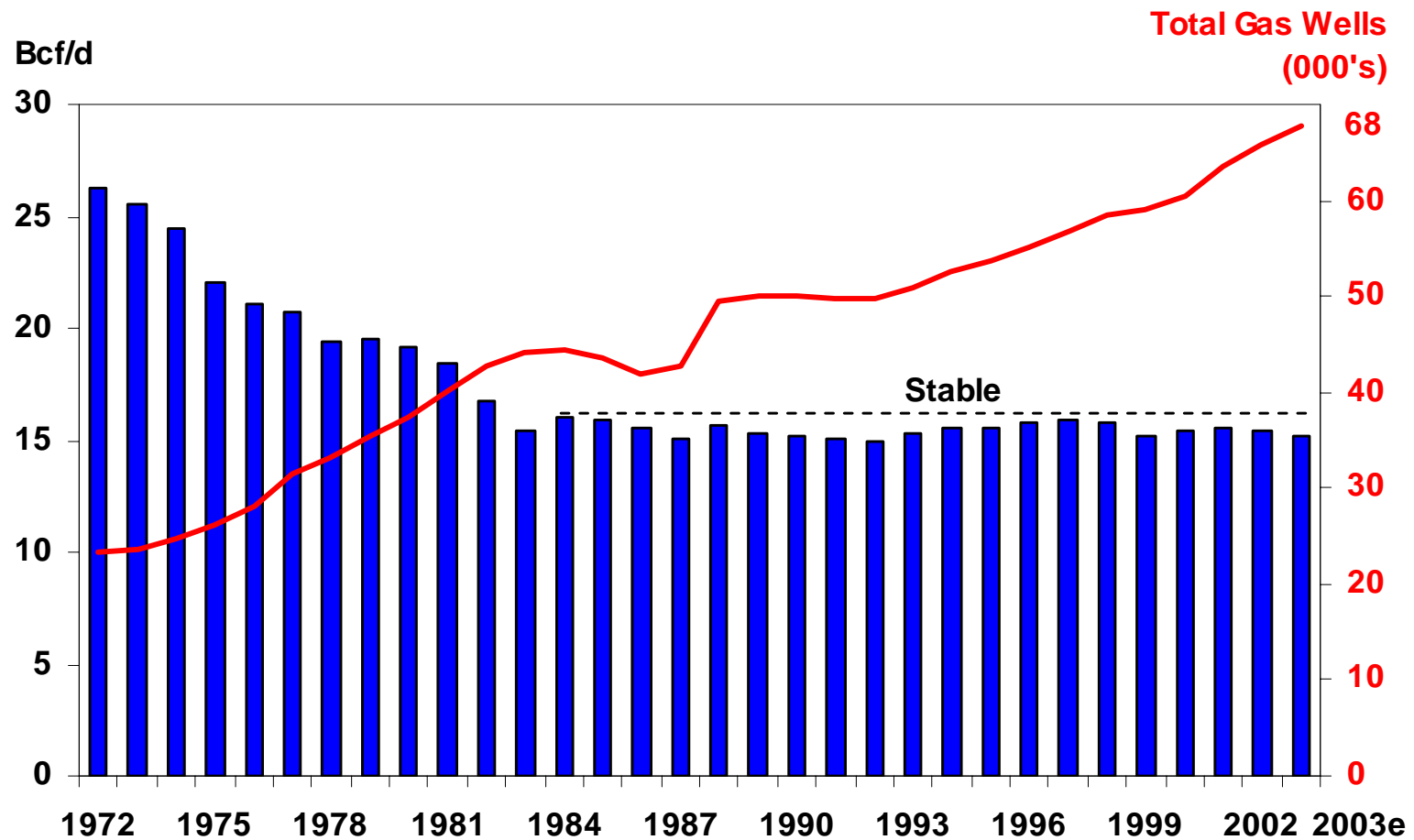
# Texas Onshore Gas Supply



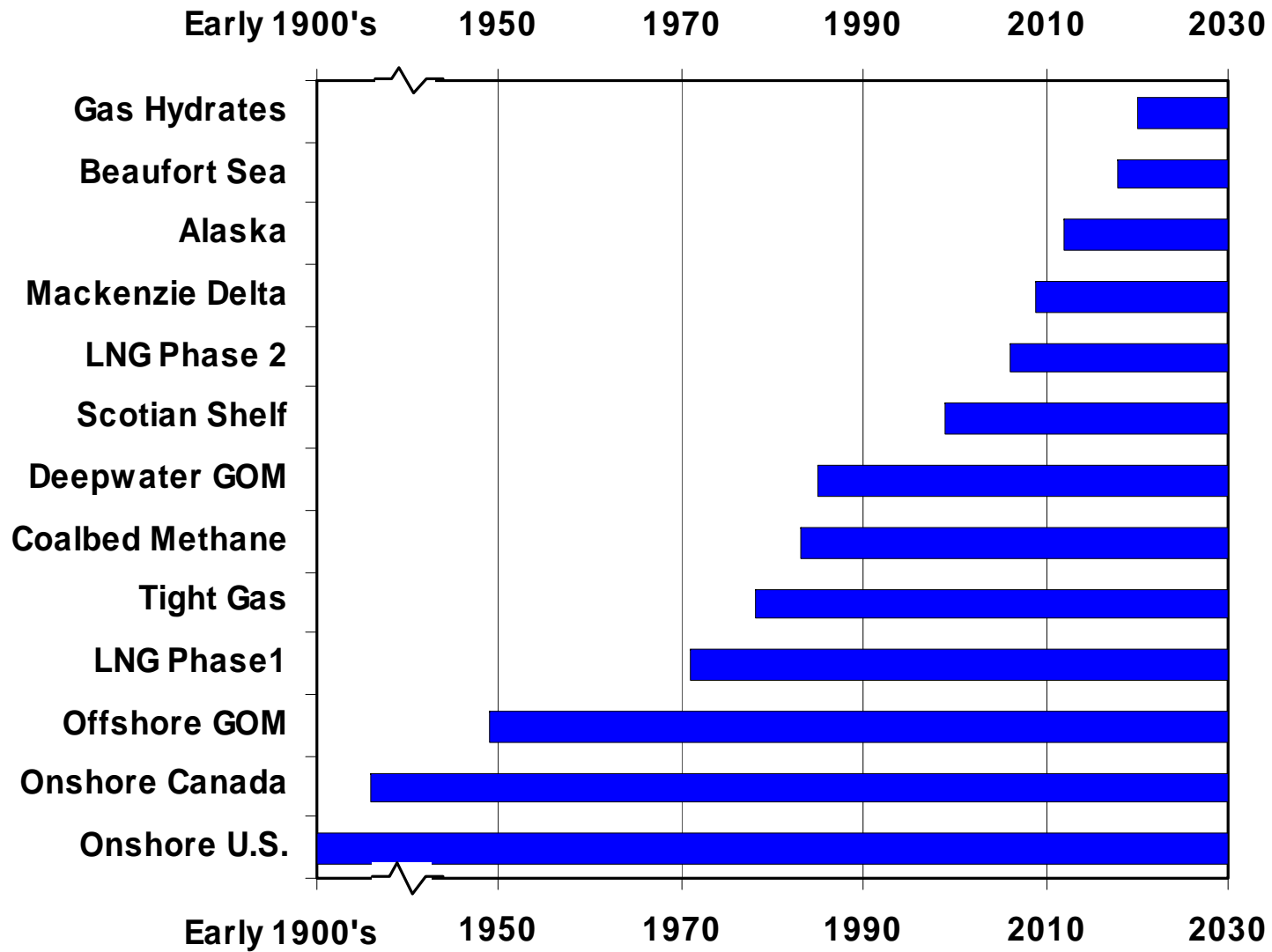
# Louisiana Gas Supply



# Texas Onshore Gas Supply Trend

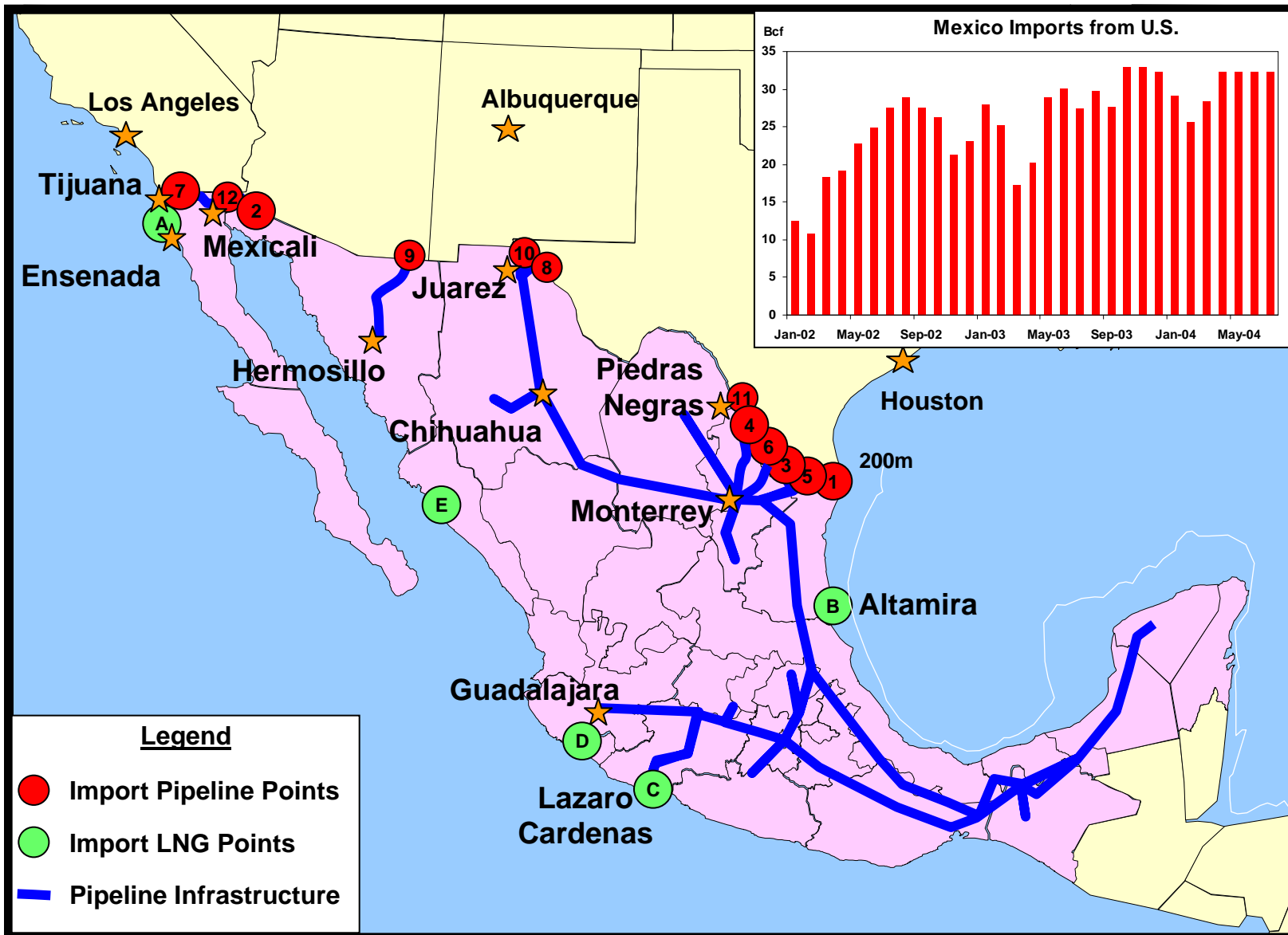


# Gas Supply Timeline

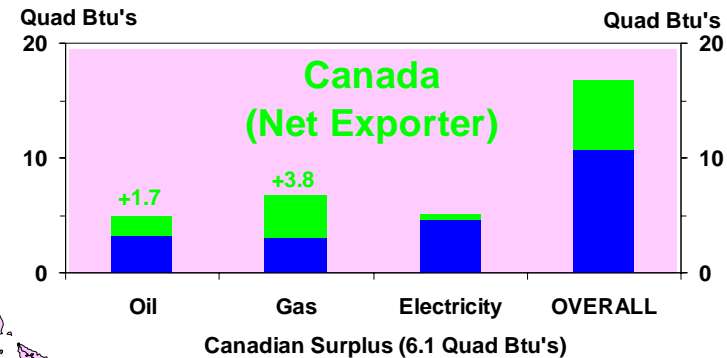
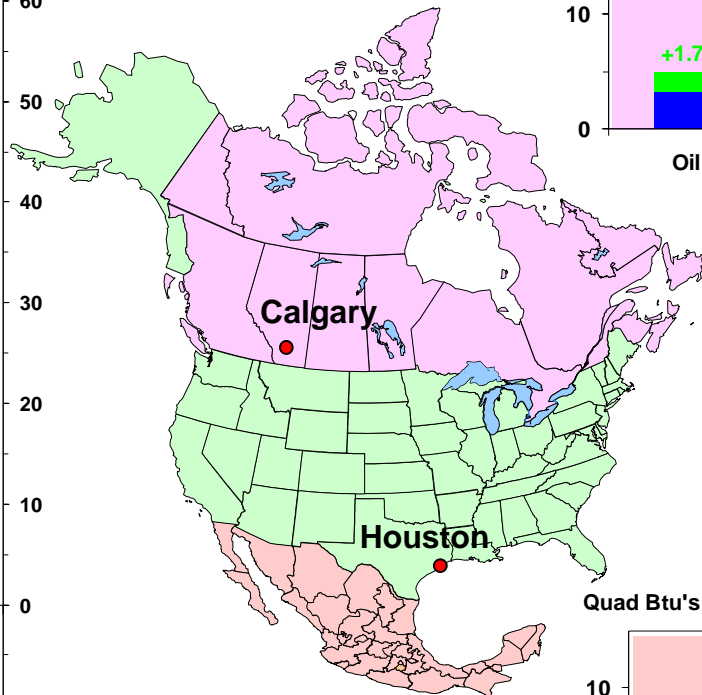
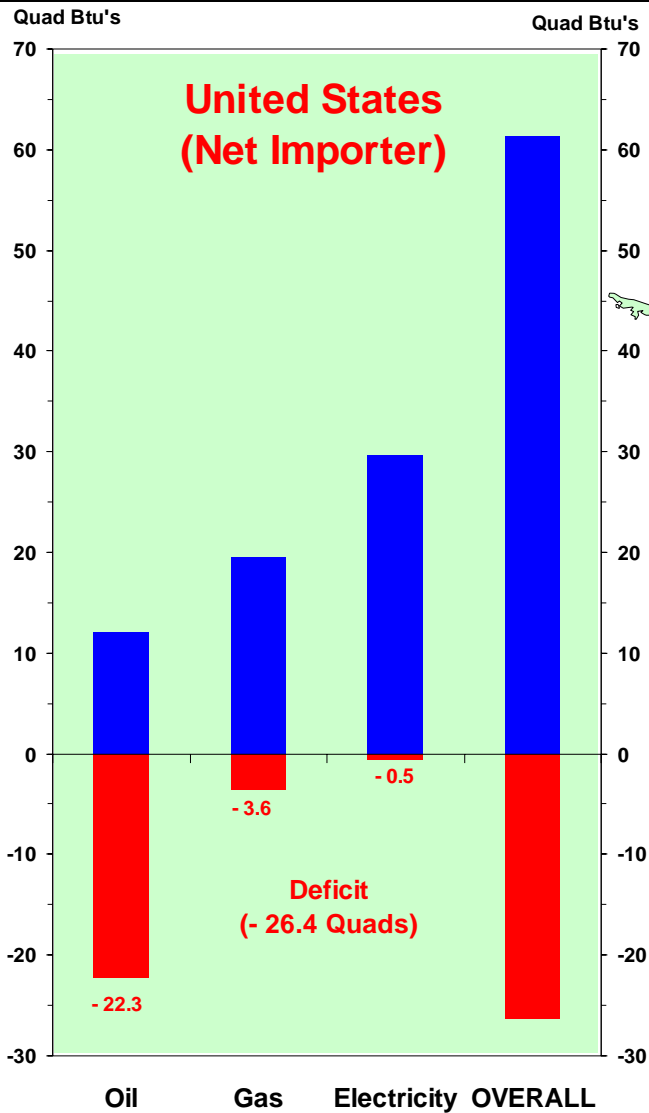




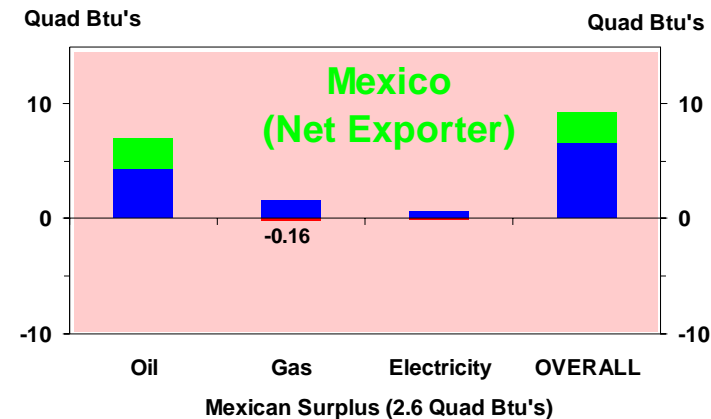
# Mexico Natural Gas Imports



# U.S. Shortfall of Energy



- Produced + Consumed
- Exported (Net)
- Imported (Net)



**North American  
Gas Strategies**  
**November 8 & 9**  
*“Living with Higher Prices”*  
**Calgary**

**Sessions:**

*Natural Gas Policies  
Reaction to High Prices  
Supply Roundtable*

*Northern Gas  
Gas Transportation Issues  
Emerging Supplies*

**Contact:**

**1-800-853-6252 ext. 279**

***Including  
Notable Speakers:***



**Victor Carrillo, Chairman**  
*Texas Railroad Commission*



**J. Michael Yeager**  
*Senior VP & Director - Imperial Oil Ltd.  
President & CEO - Imperial Oil Resources*



**John Somerhalder, President**  
*El Paso Corporation*

**Houston 2005**

**Gas Storage 2005**  
**February 2**

**Sessions:**

*New Storage Developments  
Regional Operator Views  
Storage User Roundtable*

**North American  
Gas Strategies**  
**April 4 & 5**

**Sessions:**

*Policy Roadmap  
Supply Diversity  
Building for Tomorrow*

*Managing Volatility  
Solutions to High Prices  
Roundtable: The End Users*

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