

Gas Supply Outlook to 2020



GPAC/PJVA

17th Annual Joint Conference

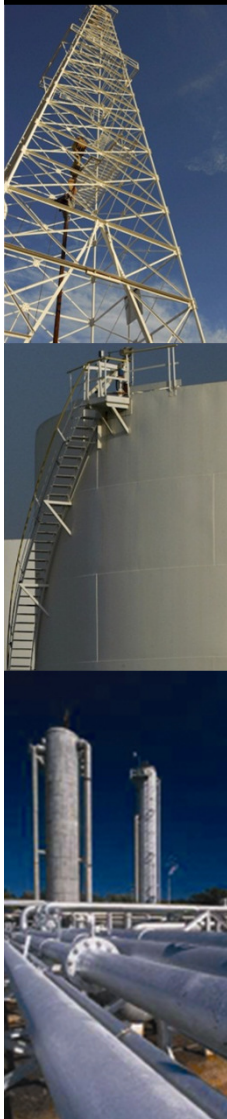
Natural Gas: Staying Competitive in Changing Times

Agenda

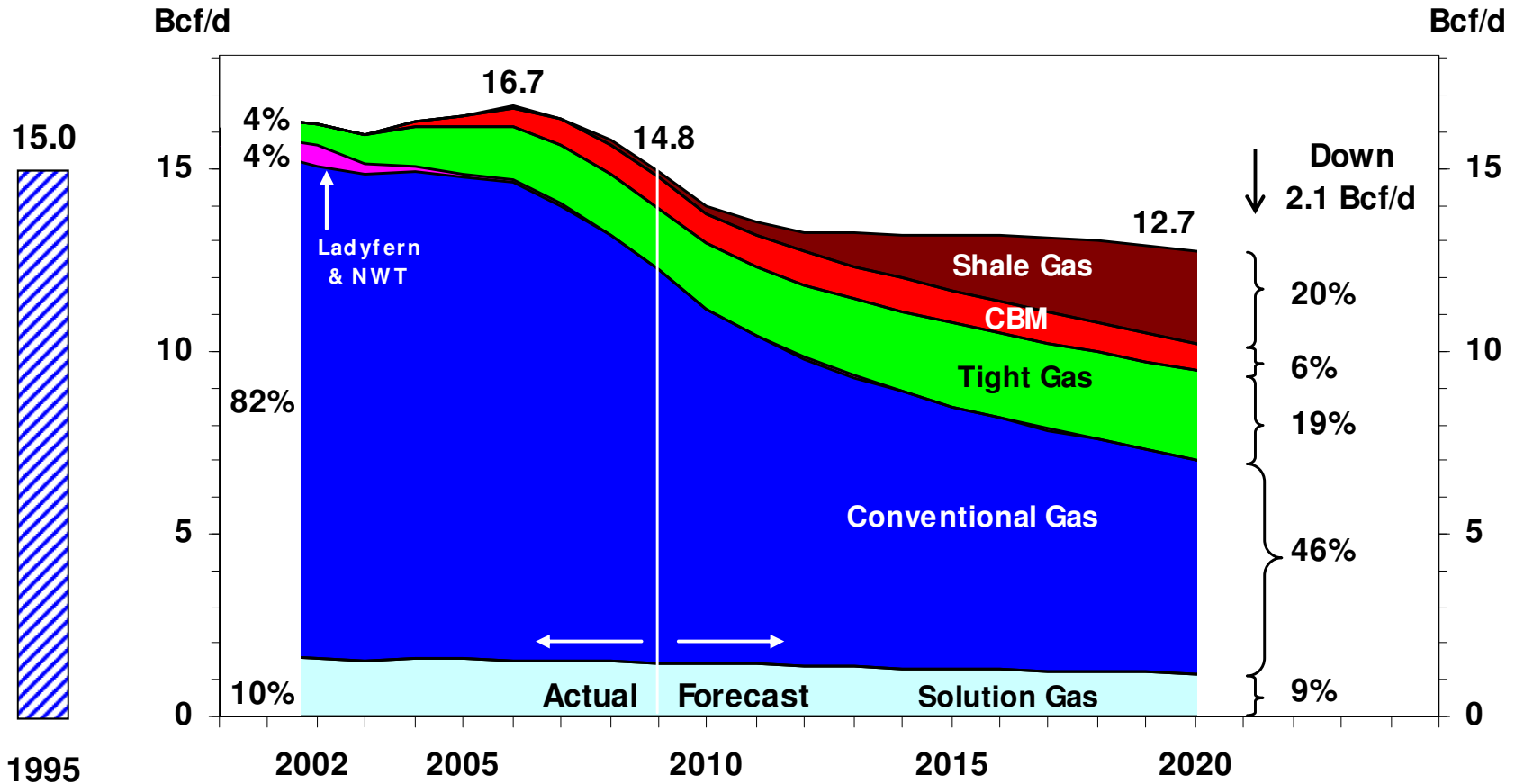
- Western Canada: Less Processing
- CBM: No Processing
- Oil Sands: Removes Supply for Processing
- Thinking and Acting in New Ways

W.P. (Bill) Gwozd, P.Eng., VP Gas Services
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November 3, 2010



Western Canada Gas: Less Processing



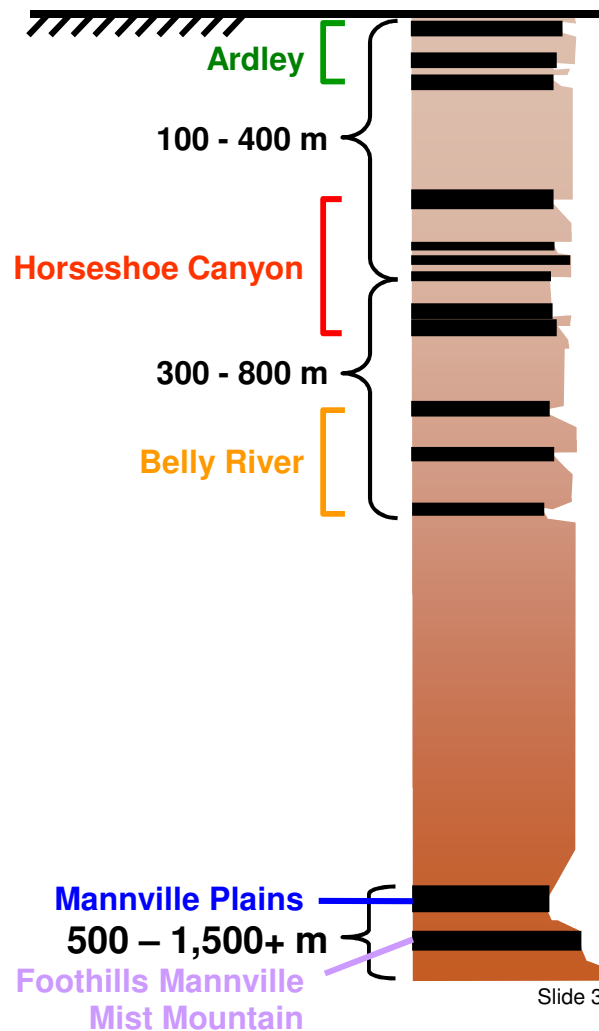
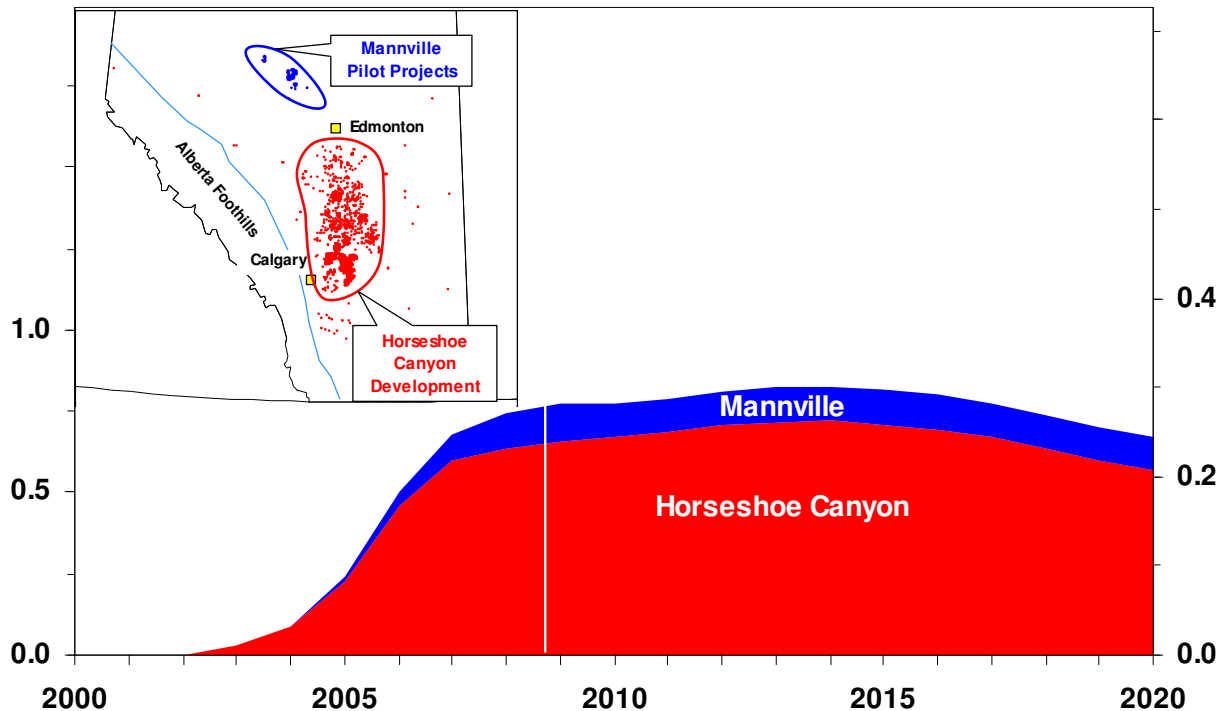
Will need to consolidate/optimize gas processing plants

CBM: No Gas Processing

Bcf/d

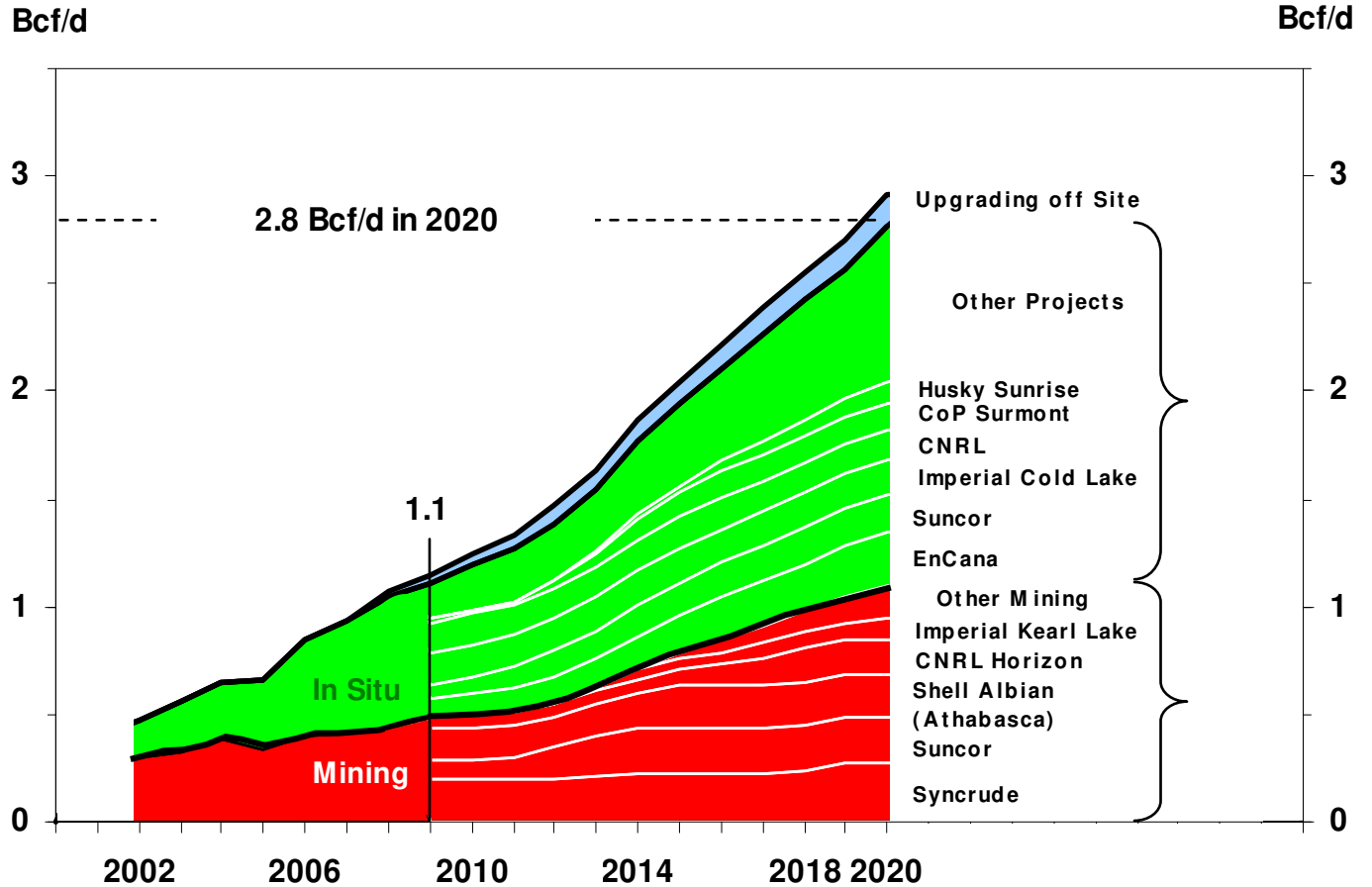
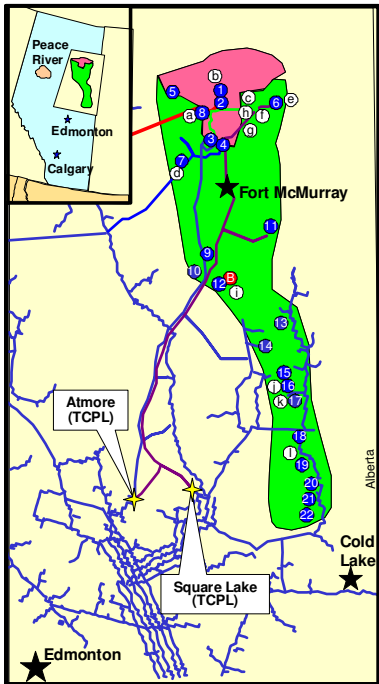
Tcf/yr

Depth of Western Canada Coal Beds



Supply growth, though no processing

Oil Sands: Removes Supply for Processing



- Paul Ziff White Paper – 20 pages
 - Industry solutions
 1. Government – did its part – good work!
 2. Producer Behaviour
 3. Service Companies
 4. Midstream / Pipeline
 5. June 2010, posted on website:

http://www.ziffenergy.com/download/papers/cdn_gas_crossroads.pdf

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