

NGL Markets in North America
an ongoing forecast service provided by

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knowledge to bridge the gap



NGL Markets in North America

❖ **Published continuously since 1988**

❖ **Subscribers include:**

- » domestic & international oil companies
- » domestic & international petrochemical companies
- » mid-stream companies
- » NGL service companies
- » propane retailers & wholesalers
- » NGL trading companies
- » government agencies
- » financial services companies

Availability & Fees

- ❖ **NGL Markets in North America** is available on an annual subscription basis
- ❖ the annual fee for 2008 is \$8,700.00 (U.S.)
- ❖ formal supply/demand & price forecasts and informal telephone discussion of current or future trends
- ❖ contact Petral Consulting Company for additional details regarding subscription to this service
- ❖ phone: 713.977.0114
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NGL MARKETS IN NORTH AMERICA

scope & content

❖ Continuing Price Forecasts

- » short-term Horizon: 18-24 Months
- » long-term Horizon: 10-15 years
- » price forecasts based on detailed supply/demand analysis & forecasts

❖ Supply/Demand Forecasts

- » regional NGL supply/demand forecasts for U.S. & Canada
- » international LPG supply tracking

NGL MARKETS IN NORTH AMERICA

scope & content

❖ Short Term Forecasts

- » provided by email to the subscribing company's distribution list
- » price and supply/demand tables provided in Excel spreadsheet format
- » market commentary provided quarterly
- » summary of **Ethylene Feedstock Survey** updated monthly via Excel spreadsheet & PDF document.

NGL MARKETS IN NORTH AMERICA

❖ Long Term Forecasts

- » regional price & supply/demand forecasts in Excel spreadsheet format
- » overview of forecasts provided in PowerPoint format

NGL SUPPLY/DEMAND FORECASTS

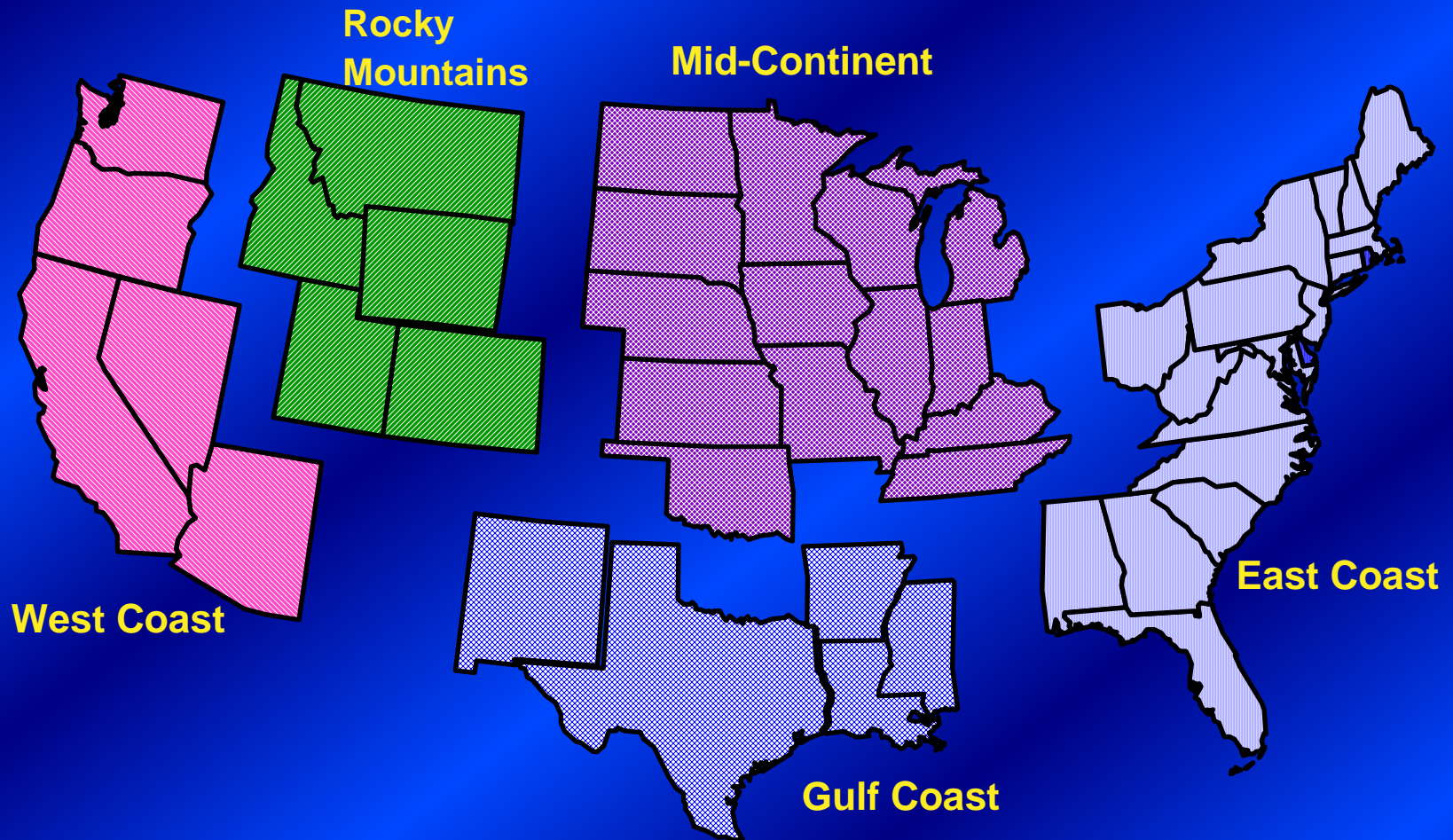
❖ Regional NGL Markets

- » East Coast
- » Mid-Continent
- » Gulf Coast
- » Rocky Mountains
- » West Coast

❖ Canadian LPG Markets

- » Western Canada
- » Eastern Canada

Regional NGL Markets



Regional NGL Markets in Canada



Regional NGL Supply/Demand & Pricing

❖ **U.S. & Canadian Supply/Demand:**

- » ethane
- » propane
- » field grade butanes (Canada only)
- » normal butane
- » isobutane (U.S. only)
- » natural gasoline (U.S. only)

Regional NGL Price Forecasts for

❖ **Mont Belvieu**

- » purity ethane & e/p mix
- » propane
- » LDH & non-LDH normal butane
- » isobutane
- » natural gasoline

❖ **Conway**

- » E/P mix
- » propane
- » normal butane
- » isobutane
- » natural gasoline

Regional NGL Price Forecasts for

❖ Sarnia

- » propane
- » normal butane
- » isobutane

❖ Edmonton

- » propane
- » field grade butanes

International LPG Price Forecasts for

❖ Middle East

- » Saudi CP for propane & butane
- » Middle East spot for propane & butane

❖ Mediterranean & Europe

- » Sonotrach postings
- » Med spot FOB & CIF
- » North Sea propane & butane postings & spot prices

❖ Asia

- » Japanese Cif spot for propane & butane

Supply/Demand Forecasts: NGL Basis Markets

- ❖ **Supply/Demand Forecasts for U.S. Crude Oil & Refined Products**
- ❖ **Overview Forecasts for Global Crude Oil**
- ❖ **Detailed Supply/Demand Forecasts for U.S. Natural Gas**
- ❖ **Ethylene Production**

Crude Oil Price Forecasts

- ❖ **West Texas Intermediate** (cash @ Cushing)
- ❖ **West Texas Sour**
- ❖ **ANS in California**
- ❖ **Kern River in California**
- ❖ **Brent**
- ❖ **Dubai/Oman**

Refined Products Price Forecasts

❖ Motor Gasoline

- » conventional unleaded regular & premium
- » reformulated regular & premium

❖ Distillate Fuel Oil

- » low sulfur & high sulfur

❖ Jet Fuel

❖ Residual Fuel Oil

- » 0.3%S, 1%S, 3%S

Natural Gas Price Forecasts

❖ Regional Wellhead Prices:

- » Henry Hub
- » Louisiana Onshore
- » Texas Gulf Coast Onshore
- » West Texas
- » New Mexico
- » Oklahoma/Kansas
- » Rocky Mountains
- » Alberta

Natural Gas Price Forecasts

❖ Regional End User/LDC Prices:

- » New England
- » Texas Gulf Coast
- » Mid-Continent
- » California

❖ City Gate Pricing:

- » Houston Ship Channel
- » Chicago
- » New York City

Petrochemicals

❖ Ethylene Production Forecasts

❖ Price Forecasts

- » ethylene (contract & spot)
- » propylene (spot & contract prices for refinery, chemical, & polymer grade)
- » butadiene
- » benzene, toluene, & mixed xylenes