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North American Oil Consumption

- Source: EIA Annual Energy Outlook 2010 (Dec 2009)
- EIA International Energy Outlook 2010 (July 2010)
North American Oil Production

Source: EIA International Energy Outlook 2010 (July 2010)
United States Crude Oil Production and Supply

Source: EIA Annual Energy Outlook 2010 (Dec 2009)
Canadian Oil Production

- Source: CAPP 2010-2025 Canadian Crude Oil Forecast and Market Outlook (June 2010)
- Growth (Expected) Case
Canada, U.S. and Mexico Demand

2009-2025 Growth 1.3% pa

Bcf/d

History

Forecast

Electric Generation 2.3% pa
Industrial 1.4% pa
Residential 0.4% pa
Commercial 0.6% pa
Other

Electric Generation
Industrial
Residential
Commercial
Other
United States Electricity Generation
Enduring Coal Scenario

Source: EIA International Energy Outlook 2010 (July 2010)
United States Electricity Generation

Switch to Gas Scenario

Canada Electricity Generation

Mexico Electricity Generation

Source: EIA International Energy Outlook 2010 (July 2010)
TransCanada

North America’s Largest Natural Gas Pipeline Network

60,000 km (37,000 mi) wholly-owned
8,800 km (5,500 mi) partially-owned
Average volume of 14 Bcf/d

North America’s 2nd Largest Natural Gas Storage Operator

380 Bcf of capacity

Canada’s Largest Private Sector Power Generator

19 power plants, 10,800 MW

Premier North American Oil Pipeline Under Construction

1.1 million B/d

4,000 Talented Employees

In 7 provinces and 34 states
Thank you

Hal Kvisle
Former President and CEO
TransCanada Corporation