

# Winter 2006/07 outlook and outturn so far

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Gas Customer Forum - 27 November 2006

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Gas Code Development Manager

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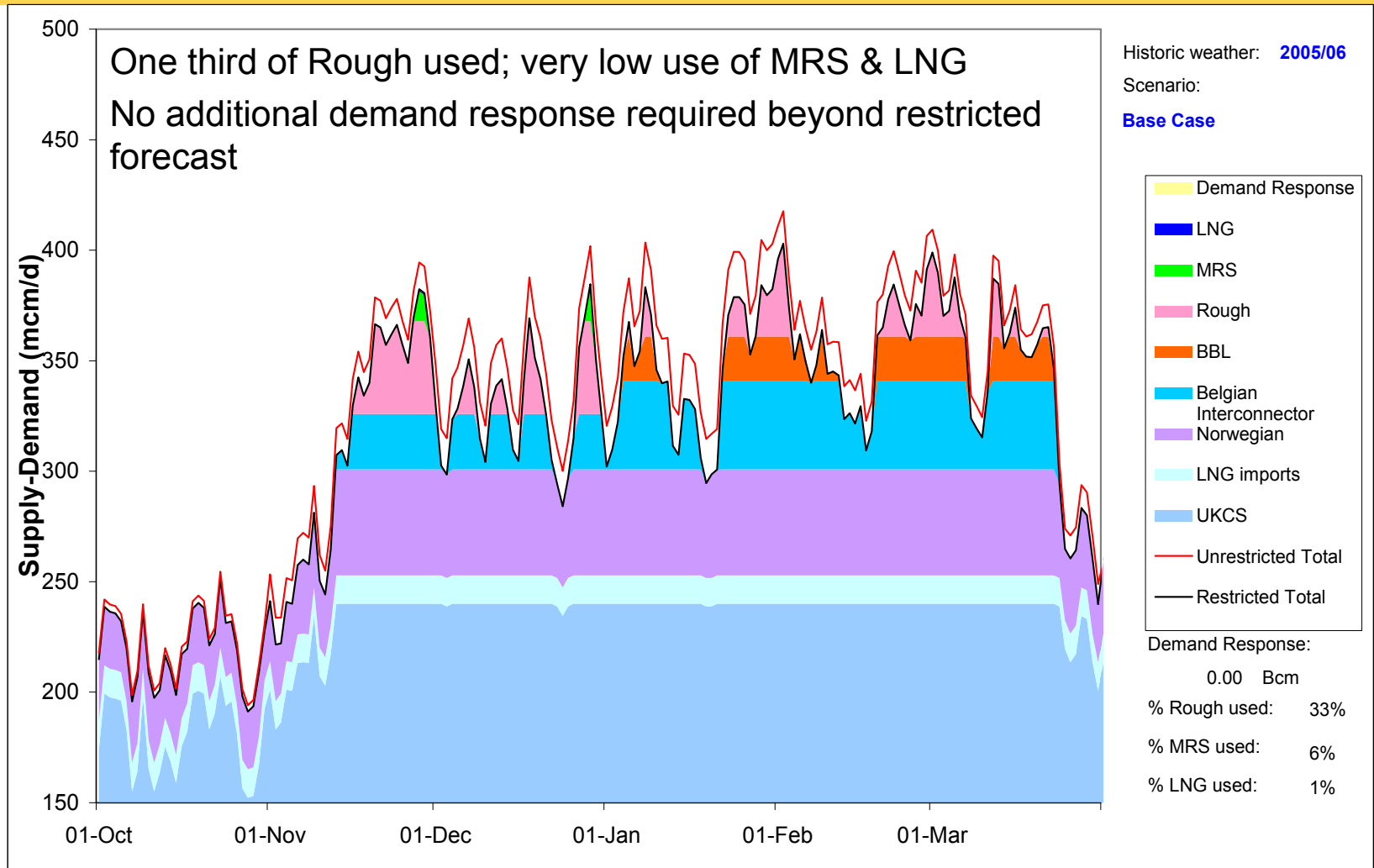
# Winter 2006/07 outlook: quick summary

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- ◆ Gas demand; forecasts materially lower than those produced in 2005
- ◆ Gas supply; positive developments have been reported in relation to new infrastructure projects, however, uncertainty remains regarding utilisation rates
- ◆ Electricity market; less uncertain. Coal generation expected to operate at baseload with gas providing marginal capacity
- ◆ Weather remains key determinant
  - ◆ Little / no demand-side response required in an average / mild winter
  - ◆ Sufficient gas to maintain supplies to Non-Daily Metered market in a 1 in 50 cold winter

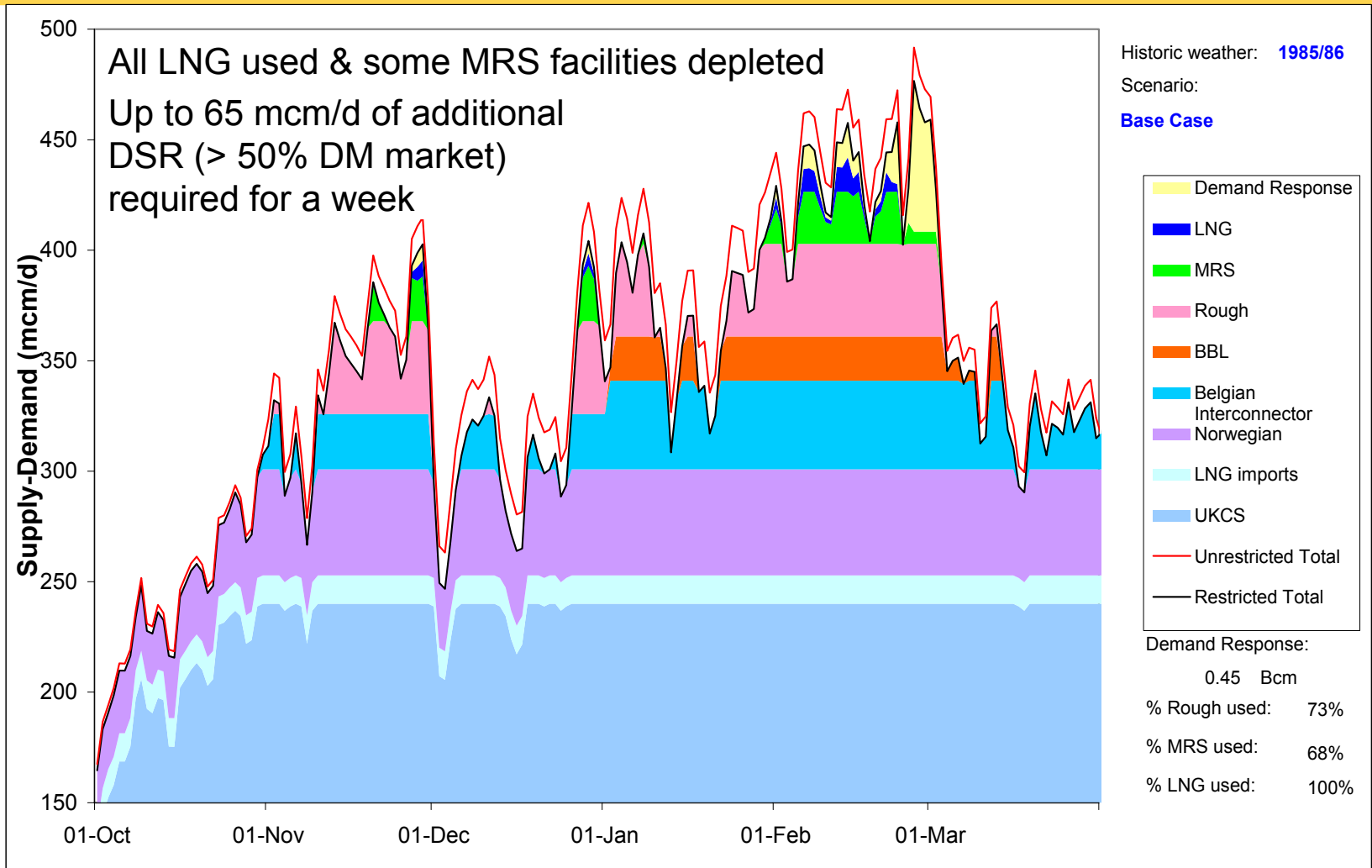
# Winter 2006/07 outlook: simulation analysis

## If the weather is like it was in 2005/06

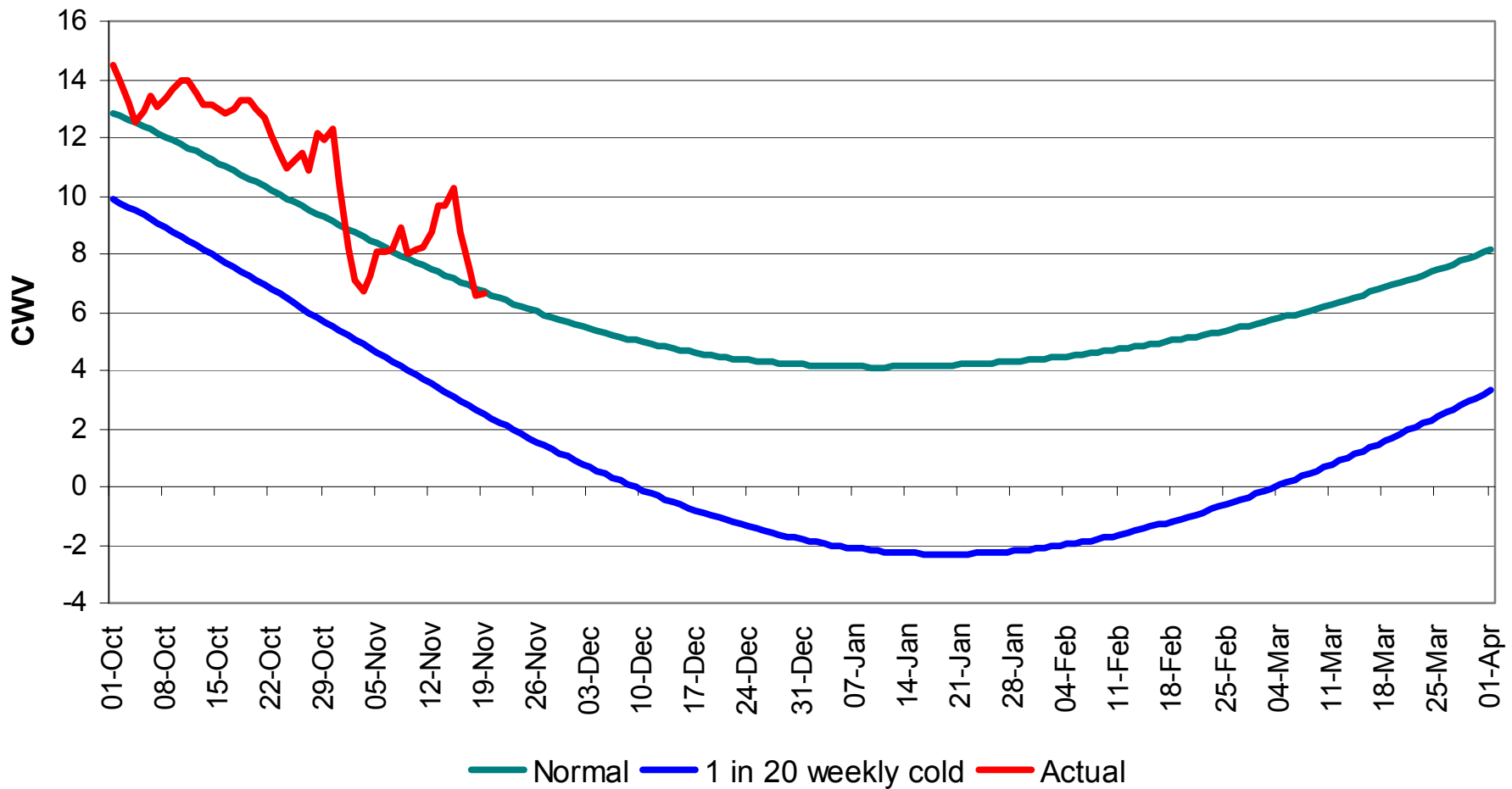


# Winter 2006/07 outlook: simulation analysis

## If it is very cold; 1985/86 (1 in 10)

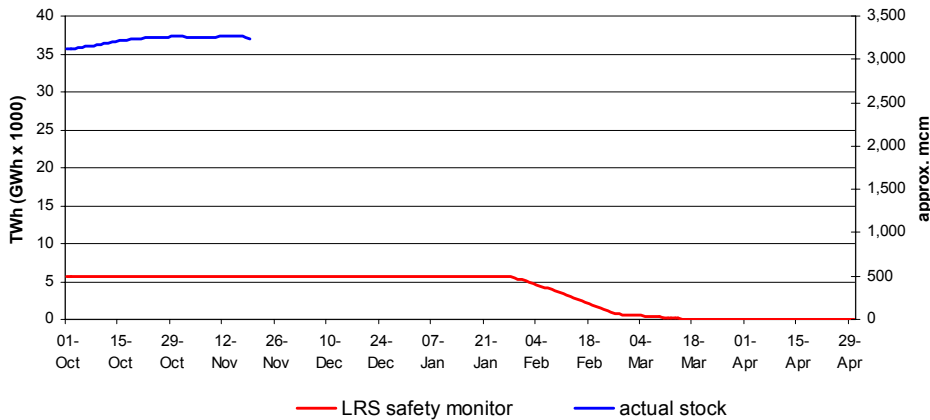


# Winter 2006/07 to date: weather

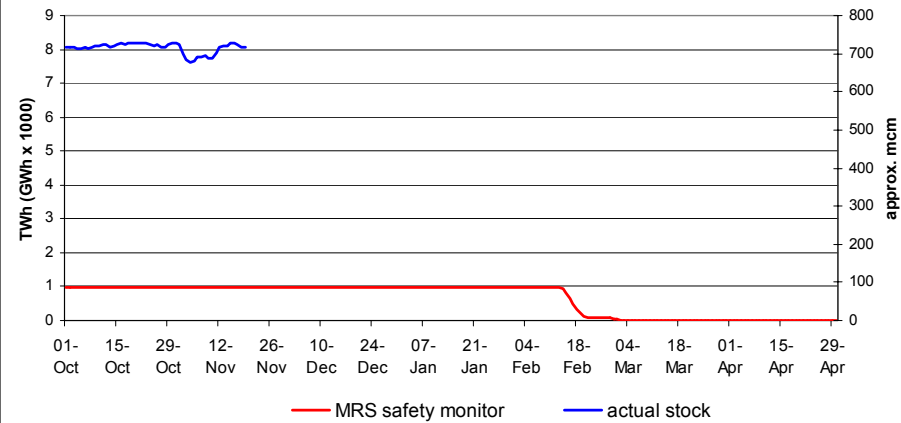


# Winter 2006/07 to date: storage position

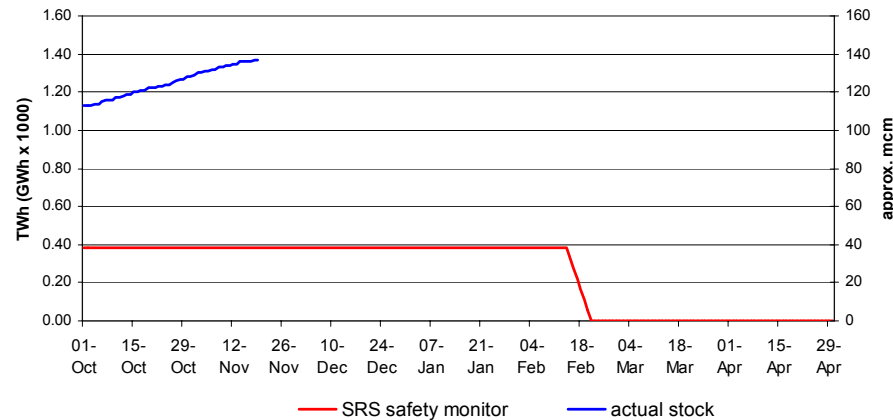
## Long Range Storage



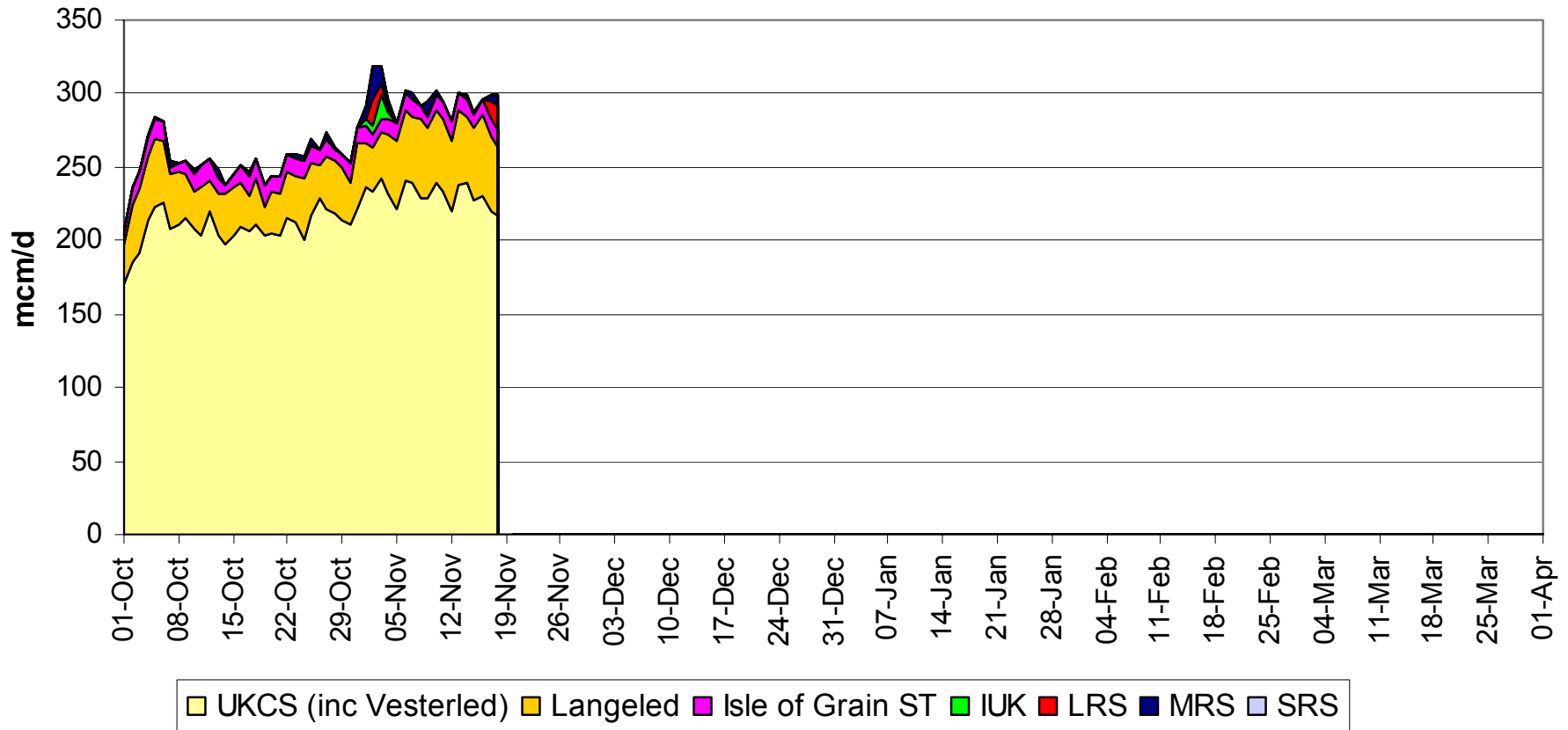
## Medium Range Storage



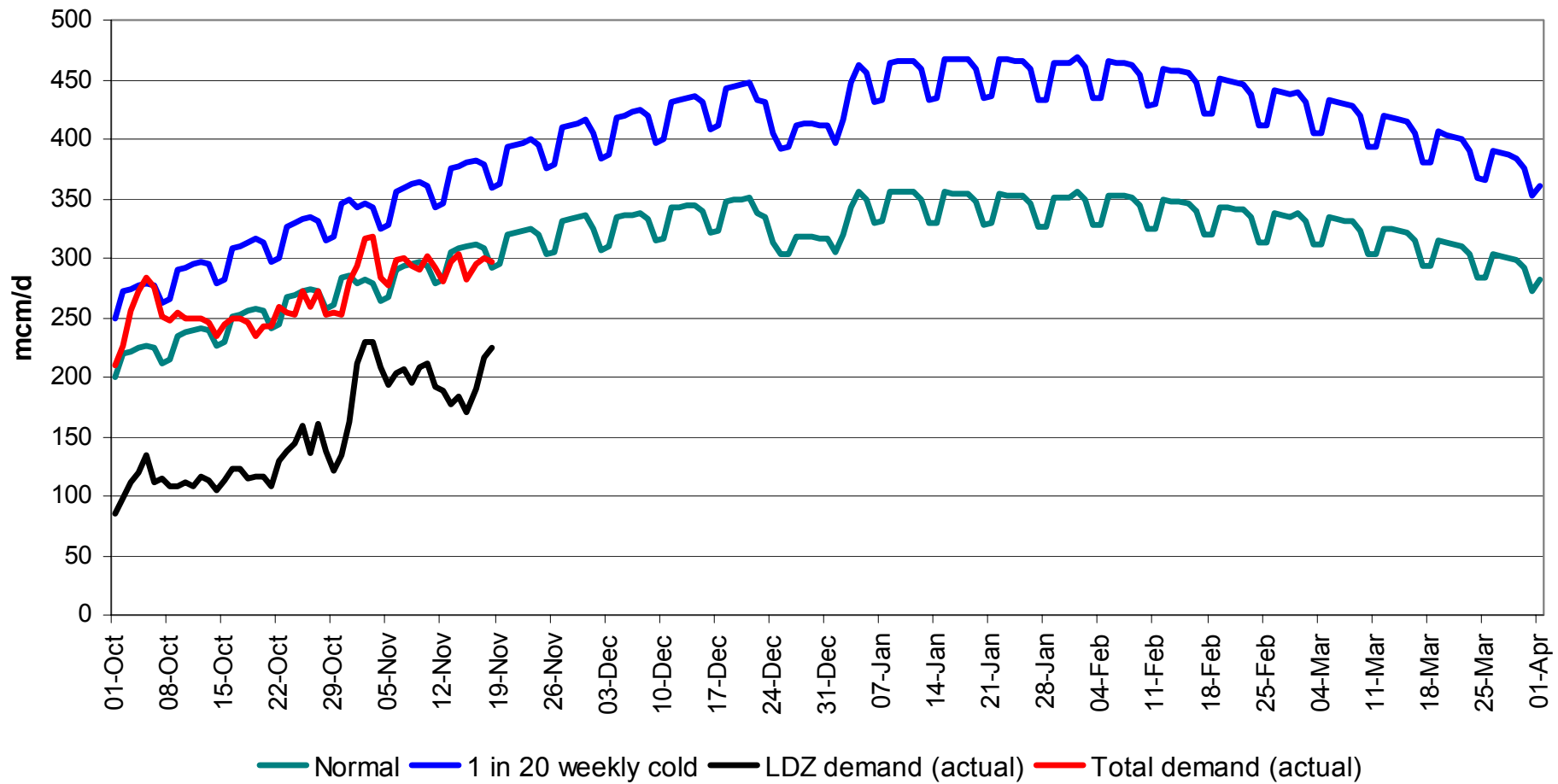
## Short Range Storage



# Winter 2006/07 to date: supply build-up



# Winter 2006/07 to date: demand



# Keeping up to date

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- ◆ Information available throughout the winter via our website [www.nationalgrid.com/uk/](http://www.nationalgrid.com/uk/)