



# Industrial Demand Destruction

Prepared for:

**North American  
Gas Strategies Retainer Service**

*Ed Porter, P.Eng.  
Cameron Gingrich*

*Calgary, Alberta*

**September 2003**

**ziff**

**ENERGY  
GROUP**

Global Energy Advisors

1117 Macleod Trail S.E. Calgary, Alberta T2G 2M8  
Tel: (403) 265-0600 Fax: (403) 261-4631  
E-mail: [bill.gwozd@ziffenergy.com](mailto:bill.gwozd@ziffenergy.com)  
Toll Free 1-800-853-6252

5151 San Felipe, Suite 550 Houston, Texas 77056  
Tel: (713) 627-8282 Fax: (713) 627-9034  
E-mail: [paul.ziff@ziffenergy.com](mailto:paul.ziff@ziffenergy.com)  
Toll Free 1-888-736-5780

**03GC-5001-11**

# INDUSTRIAL DEMAND DESTRUCTION

## TABLE OF CONTENTS

---

Section	Page
EXECUTIVE SUMMARY .....	1
INTRODUCTION .....	1
INDUSTRIAL DEMAND SECTORS.....	2
NORTH AMERICAN INDUSTRIAL DEMAND BY REGION .....	4
INDUSTRIAL DEMAND SECTOR ANALYSIS .....	5
Other Manufacturing .....	5
Chemicals .....	6
Metals .....	9
Petroleum Refining .....	10
Pulp and Paper .....	11

