



North American Pipeline

A Five Year Review

Prepared for:

**North American
Gas Strategies Retainer Service**

*Ed Porter, P.Eng.
Cameron Gingrich*

Calgary, Alberta

April 2004

ziff

**ENERGY
GROUP**

Global Energy Advisors

1117 Macleod Trail S.E. Calgary, Alberta T2G 2M8
Tel: (403) 234-4299 Fax: (403) 261-4631
E-mail: bill.gwozd@ziffenergy.com
Toll Free 1-800-853-6252 ext. 299

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

04GC-5001-19

North American Pipeline Overview

TABLE OF CONTENTS

Section	Page
EXECUTIVE SUMMARY	1
INTRODUCTION	1
PIPELINE PROJECTS	2
NORTH AMERICAN GAS PRODUCTION	3
U.S. GULF COAST PIPELINES	4
WESTERN CANADA PIPELINES	5
U.S. ROCKIES PIPELINES	6
INTER-BASIN COMPETITION	7
AVERAGE PIPELINE FLOWS	8
PIPELINE COSTS	9