



INGAA Foundation Spring Meeting
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MidWest and South Gas Pipeline Projects
2008 and Beyond

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MidWest and South Pipeline Projects 2008 and Beyond

Drivers

- **Growth of the various supply basins**
 - Barnett Shale
 - Fayetteville Shale
 - Granite Wash
 - Woodford Shale
 - Rockies Production
- **Growth of LNG Receipt Facilities**
- **Clean/Efficient Energy Demand**

Estimated Project Workload - MidSouth

Developer	Project	States	Size (NPS)	Length (miles)	Projected Construction	Comments
MidSouth						
MidContinent Express Kinder Morgan - 50% Energy Transfer- 50%	MidContinent Express	OK, TX, LA, MS, AL	30,36,42	504	2008, 2009	Initially 3 compressor stations totaling 79,000 hp 13 pipeline interconnects
Kinder Morgan Louisiana Pipeline	KMLP	LA	42	137	2008, 2009	13 interconnects
Cheniere	Creole Trail	LA	42	153	2007, 2008, 2009	
Sempra Pipeline and Storage	Cameron Project	LA	42	36	2008	
	Port Arthur Pipeline	TX, LA	42	70	2008	
ExxonMobil	Golden Pass	LA	42	70	2008, 2009	
Enterprise	Sherman Extension 1	TX	36	56	2008	
	Sherman Extension 2	TX	30 & 36	122	2008	
Southeast Supply Header Spectra Energy Centerpoint Energy		LA, MS,AL	36 & 42	270		3 compressor stations & 2 ooster stations
Enbridge		TX, LA, MS	36	330	2009	
Boardwalk						
Gulf Crossing Pipeline	Sherman to Perryville	TX, LA	42	355	2008	
South East Expansion		MS, AL	42	111	2007, 2008	2 new compressor stations apprx 50,000 hp
Texas Gas Transmission	Fayetteville Lateral	AK, MS	36	167	2008, 2009	
	Greenville Lateral	MS	36	98	2008, 2009	
Centerpoint	Arkansas to Mississippi	AK, MS	36	160	2010	
Denbury Resources	CO2	LA, TX	24	300	2010	

2,939

Estimated Project Workload – Upper Midwest

<i>Developer</i>	<i>Project</i>	<i>States</i>	<i>Size (NPS)</i>	<i>Length (miles)</i>	<i>Projected Construction</i>	<i>Comments</i>
Upper Midwest						
<i>Rockies Express Pipeline</i>	REX West	CO, NB, KS, MO	42	713	2007, 2008	8 compressor stations totaling 250,000 hp
Kinder Morgan- 50%						5 Interconnects
Sempra Pipeline and Storage- 25%	REX East	MO, IL, IN, OH	42		2008, 2009	7 compressor stations totaling 210,000 hp
Conoco Phillips-25%						15 Interconnects
<i>REX/NGPL Chicago Project</i>	Meeker to Wamsutter	CO, WY	30 or 36	135	?20102011	
	Opal to Wamsutter	WY	30 or 36	138	?20102011	
	Wamsutter to Arlington	WY	36	102	?20102011	
	Arlington to NGPL	WY, NB, IA	36	735	2010. 2011	
<i>Guardian Pipeline</i>		WI	30	101	2008	
<i>MichCon</i>		MI	30	7	2008	

1,931

Estimated Project Workload – Southeast and TX

<i>Developer</i>	<i>Project</i>	<i>States</i>	<i>Size (NPS)</i>	<i>Length (miles)</i>	<i>Projected Construction</i>	<i>Comments</i>
SouthEast						
<i>Florida Gas Transmission</i>	Phase VIII	AL,MS, FL	Large Diameter	580	2009,2010, 2011	217,000 hp
Southern Union						
El Paso						
<i>Southern Natural Gas</i>	Cypress Pipeline- P3	GA	30	10	2009, 2010	3 compressor stations totaling 31,050 hp
<i>Southern Natural Gas</i>	Elba Express	GA, SC	36 & 42	190	?	
Texas Intrastate						
Energy Transfer	Southeast Bossier	TX	42	150	2008	
	Paris Loop	TX	36	145	2008	
	Maypearl to Malone	TX	36	25	2008	
	Carthage Loop	TX	42	33	2008	
	Katy Loop	TX	36	55	2008	
	Southern Shale	TX	36	32	2008	
	Cleburne Loop to Tolar	TX	36	25	2008	

1,245

Summary

- **Plenty of gas pipeline project work in the near future; ~ 6,000 miles in the next 2-3 years**
- **Insufficient number of experienced resources continues to be an issue.**
- **Costs continue to escalate beyond reason forcing project returns toward unacceptable hurdle rates.**

Questions?