Winter to date

Chris Train, Network Operations Director, 16th March 2010

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Agenda

- Weather
- Gas
- Electricity
- Gas Power Interaction
- Summary

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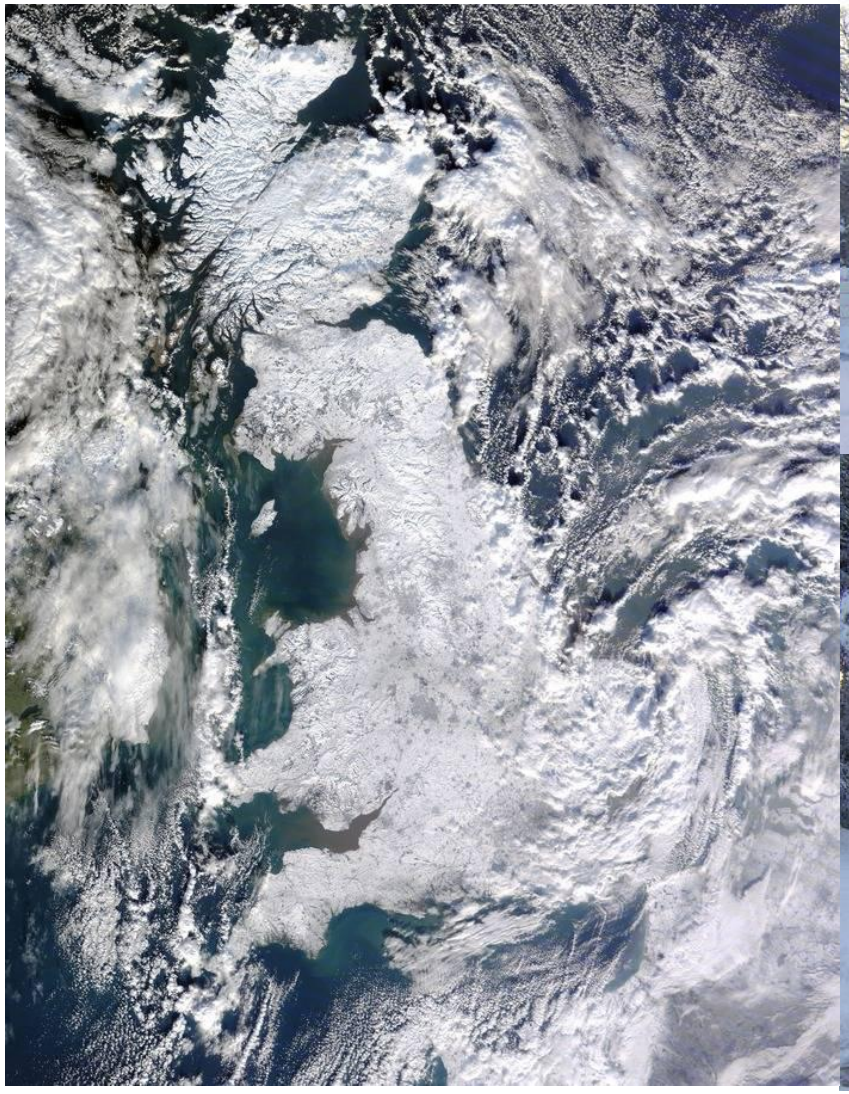
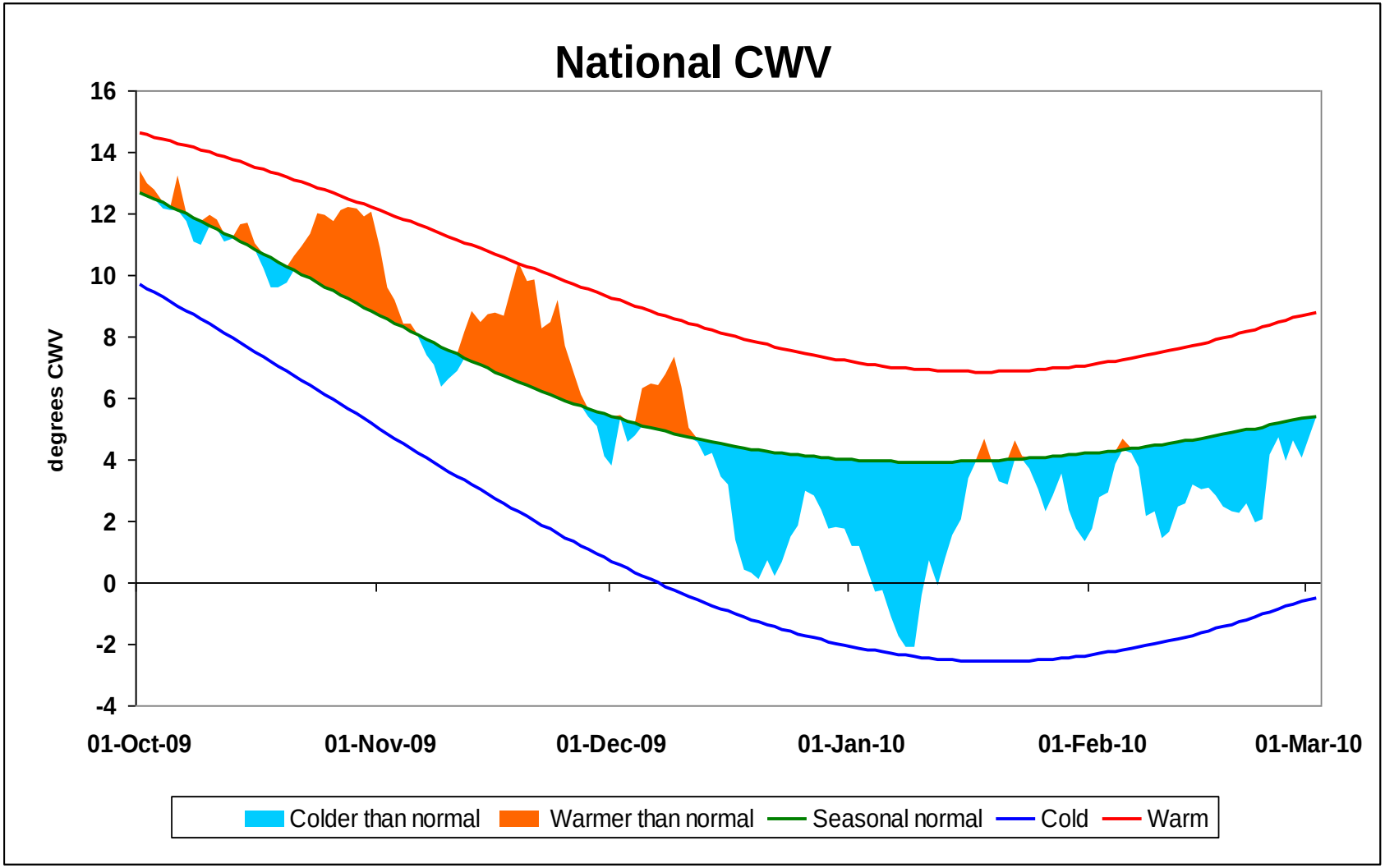
Weather



December to February CWV



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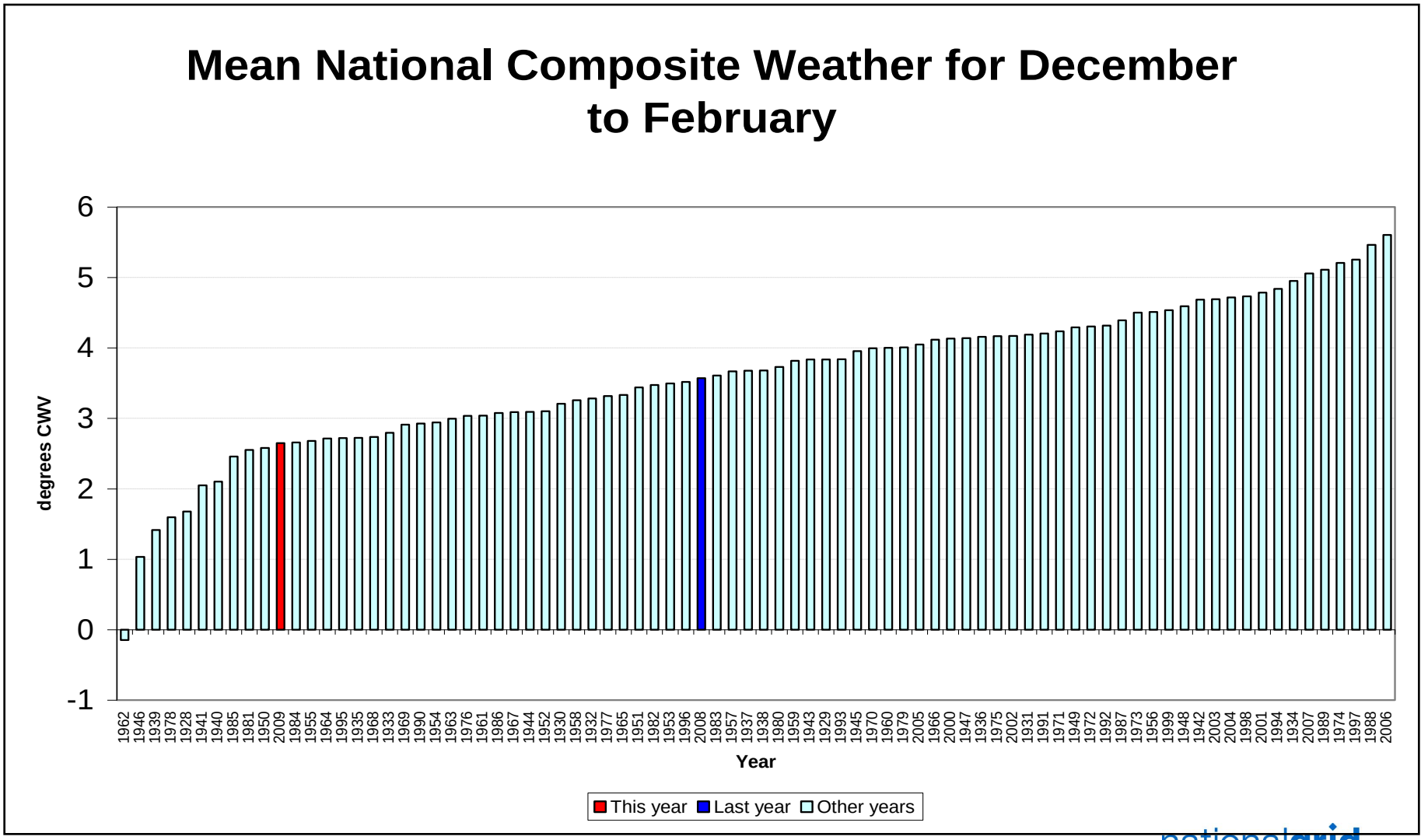
2009/10 winter severity CWV



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Gas

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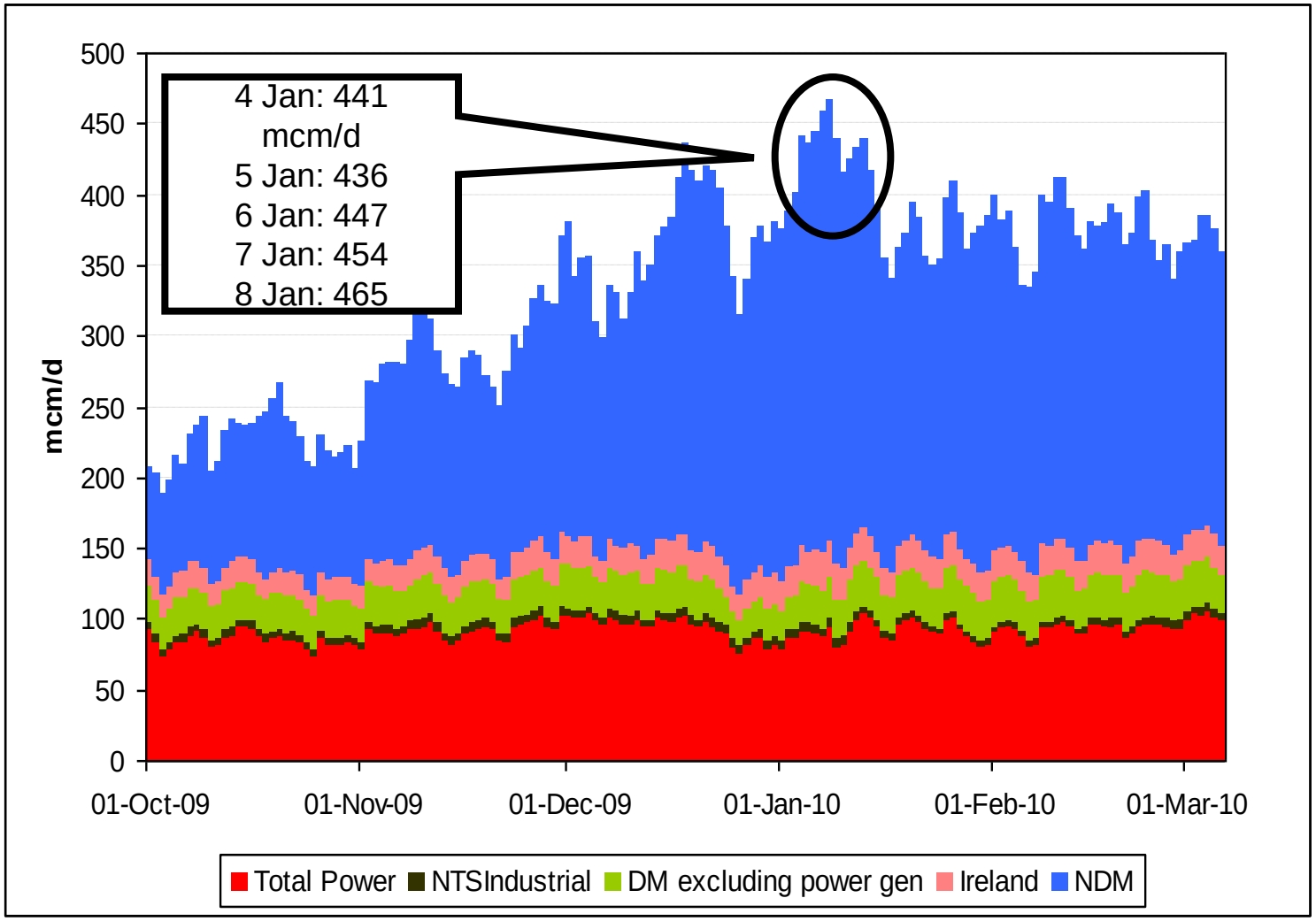
2009/10 Total demand



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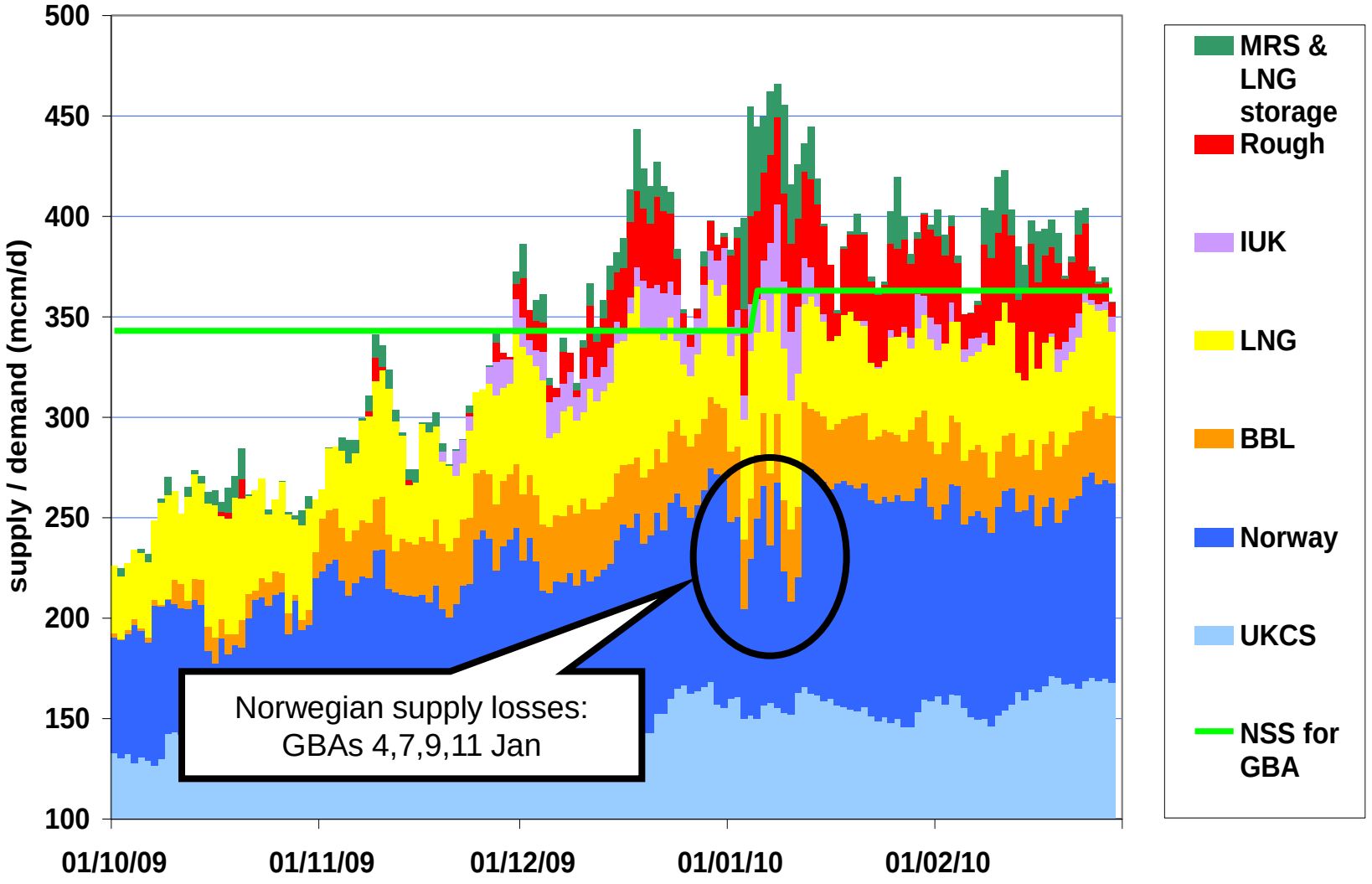
Winter 2009/10 supplies



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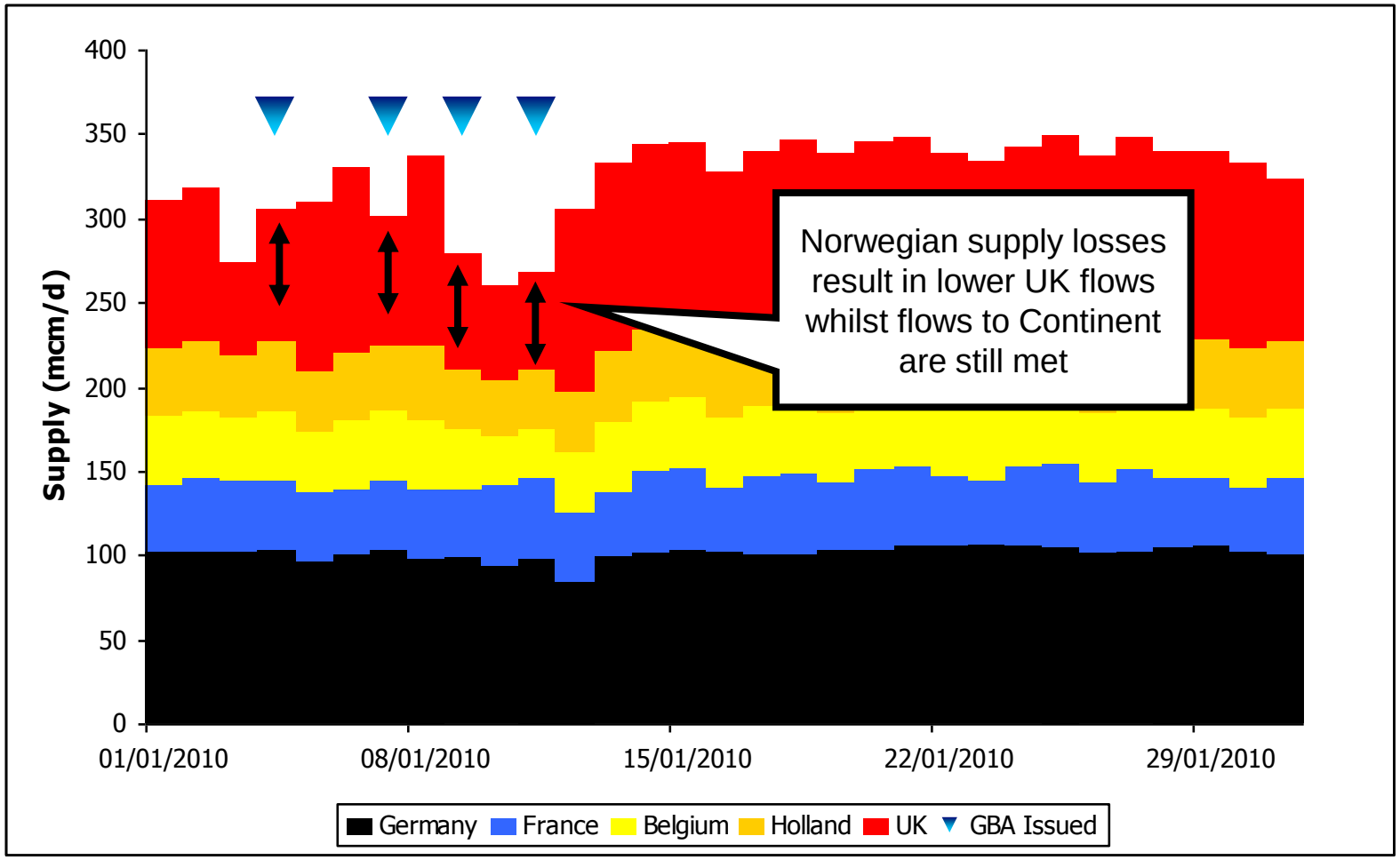
Norwegian flows to UK & Continent



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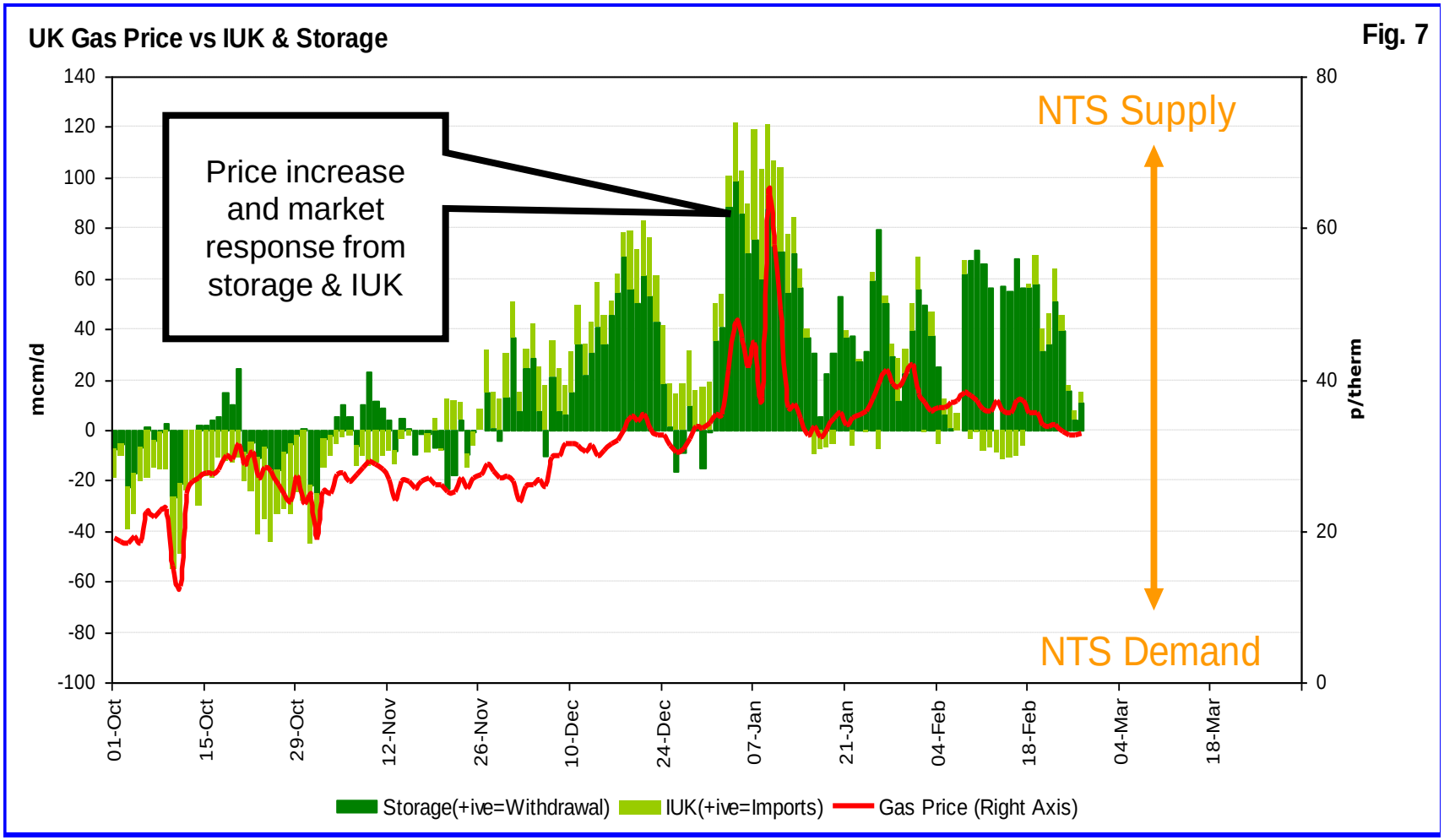
Storage & IUK flows



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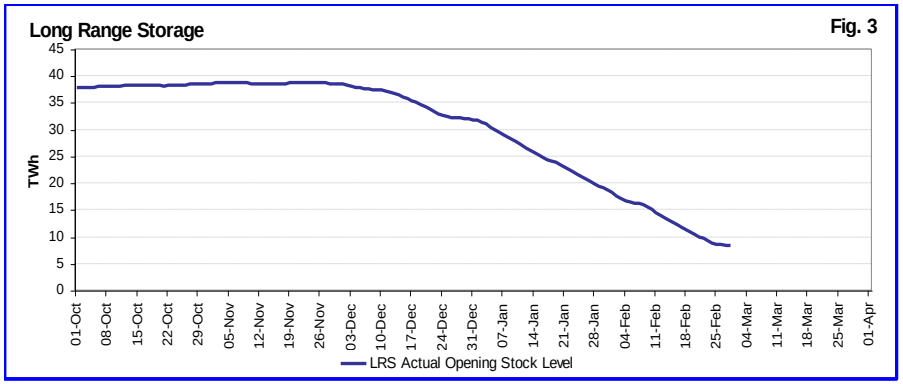
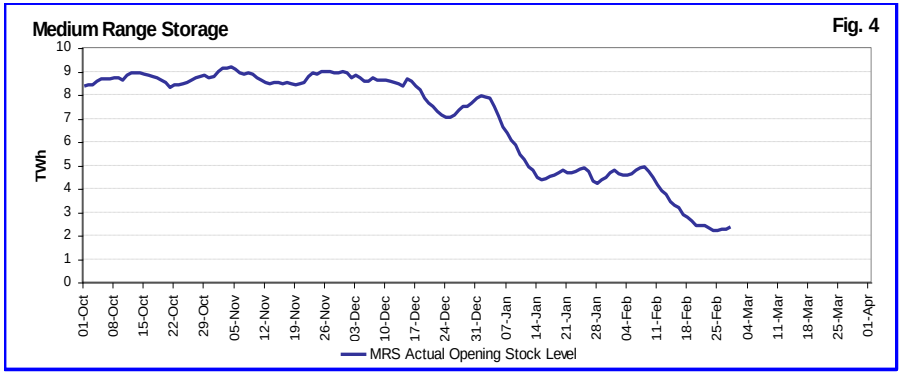
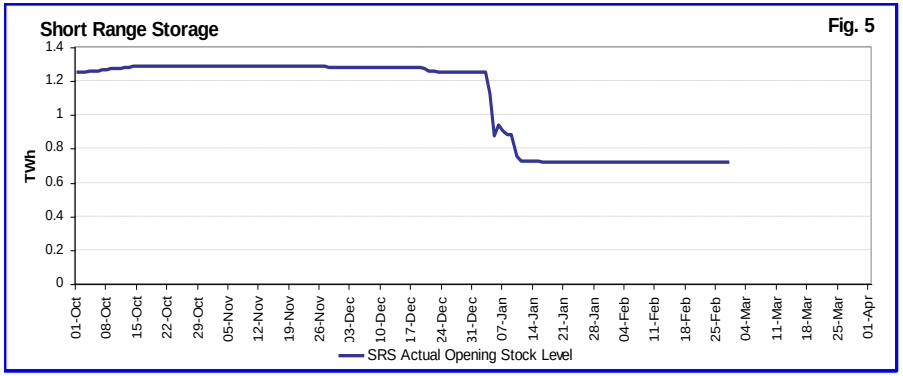
Storage use







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Electricity

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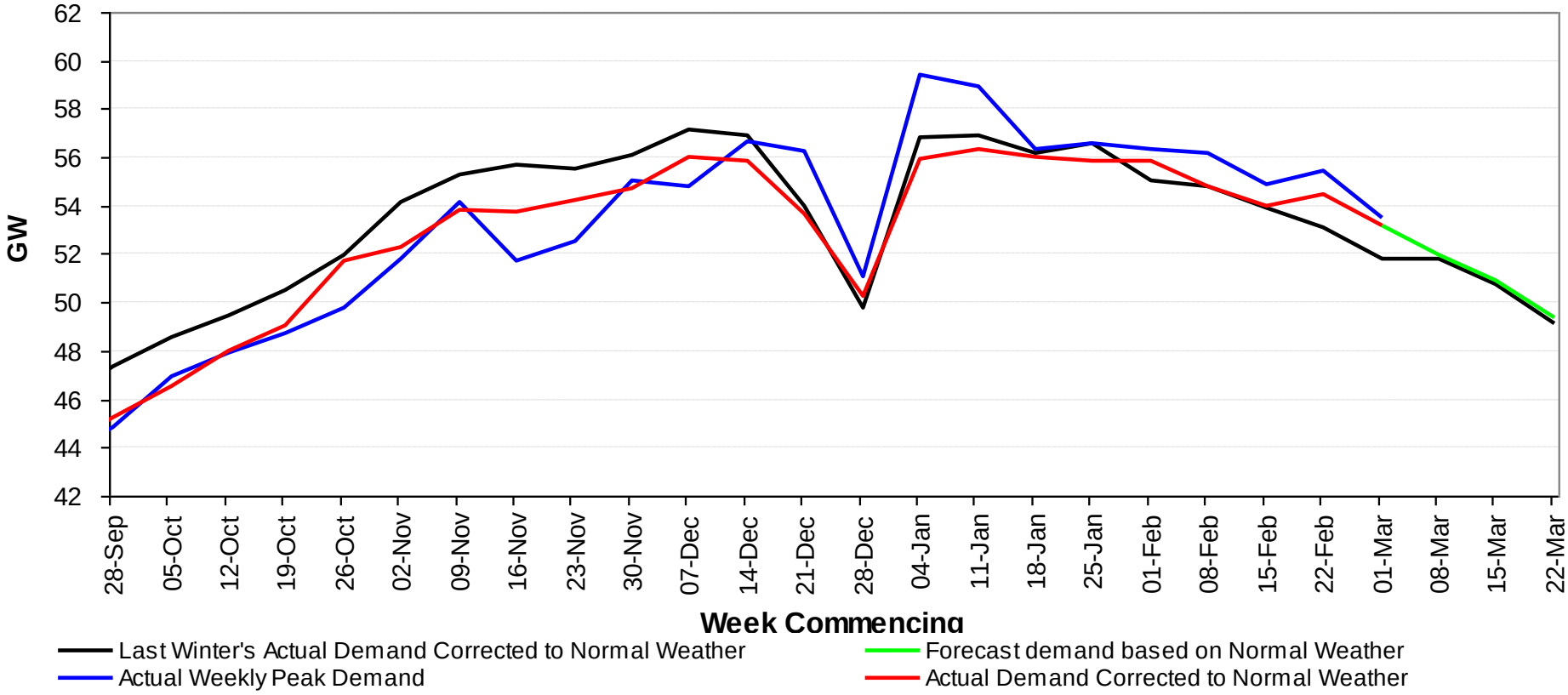
Weekly peak demand



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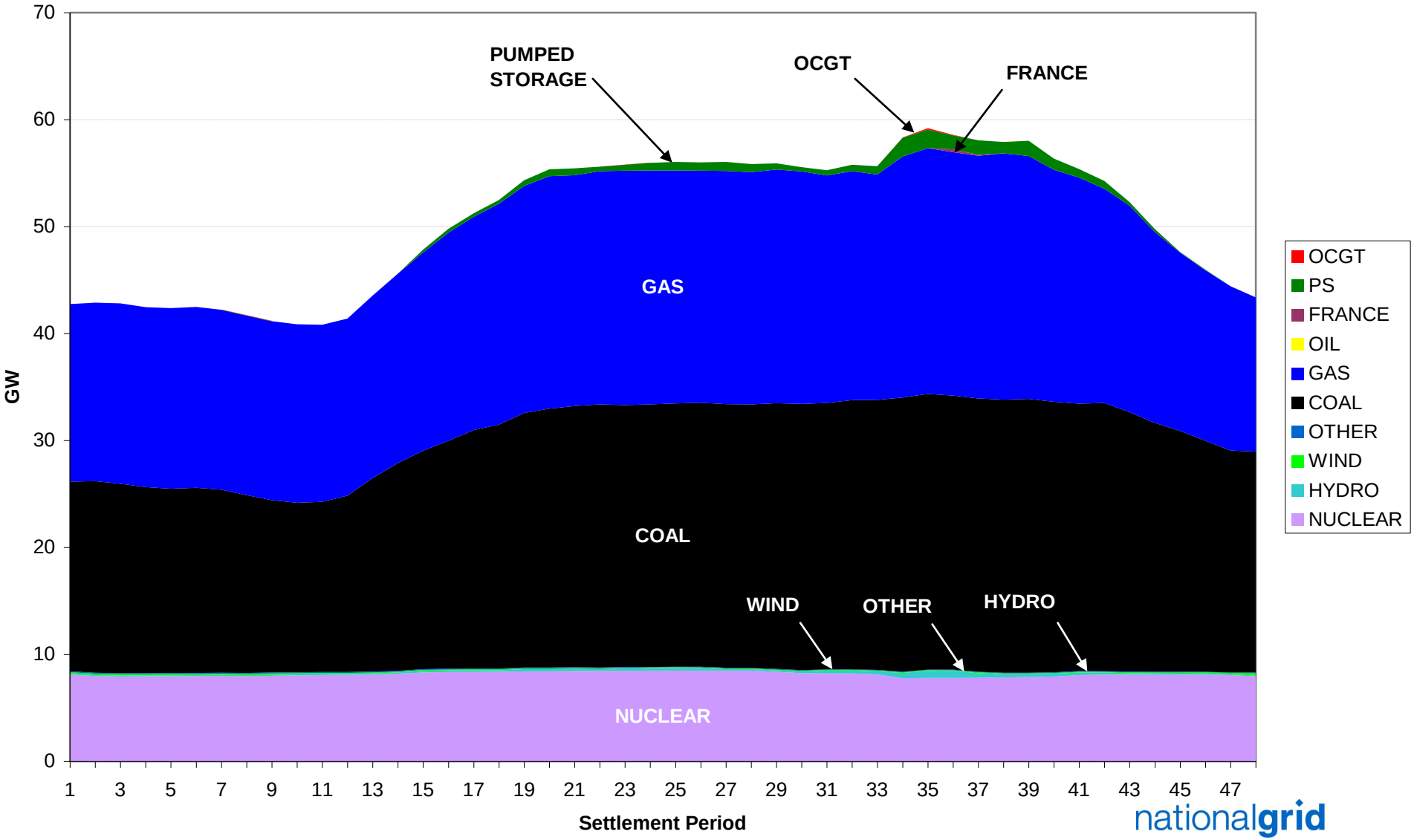
Peak day generation mix



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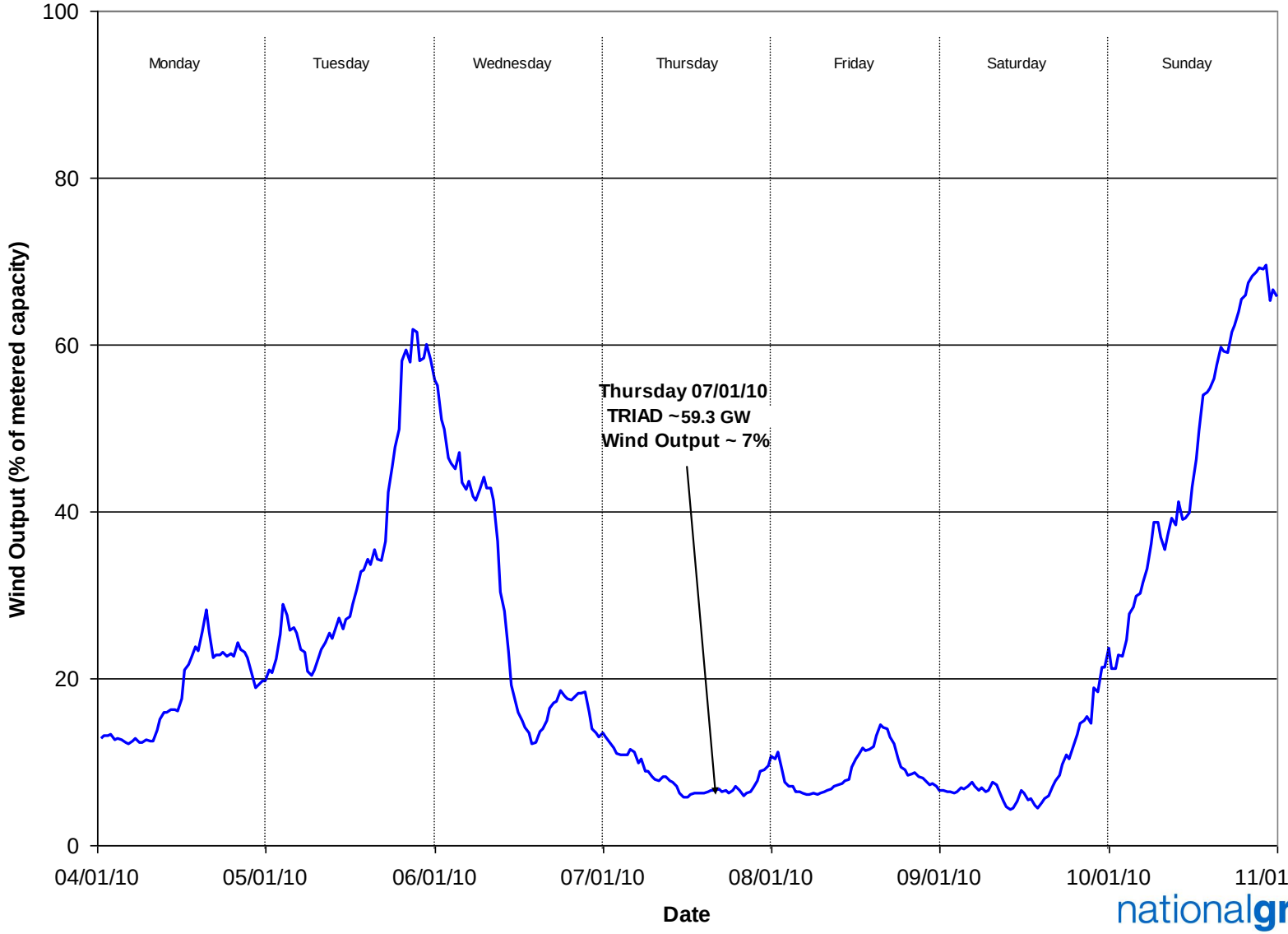
Wind power output during the high demand



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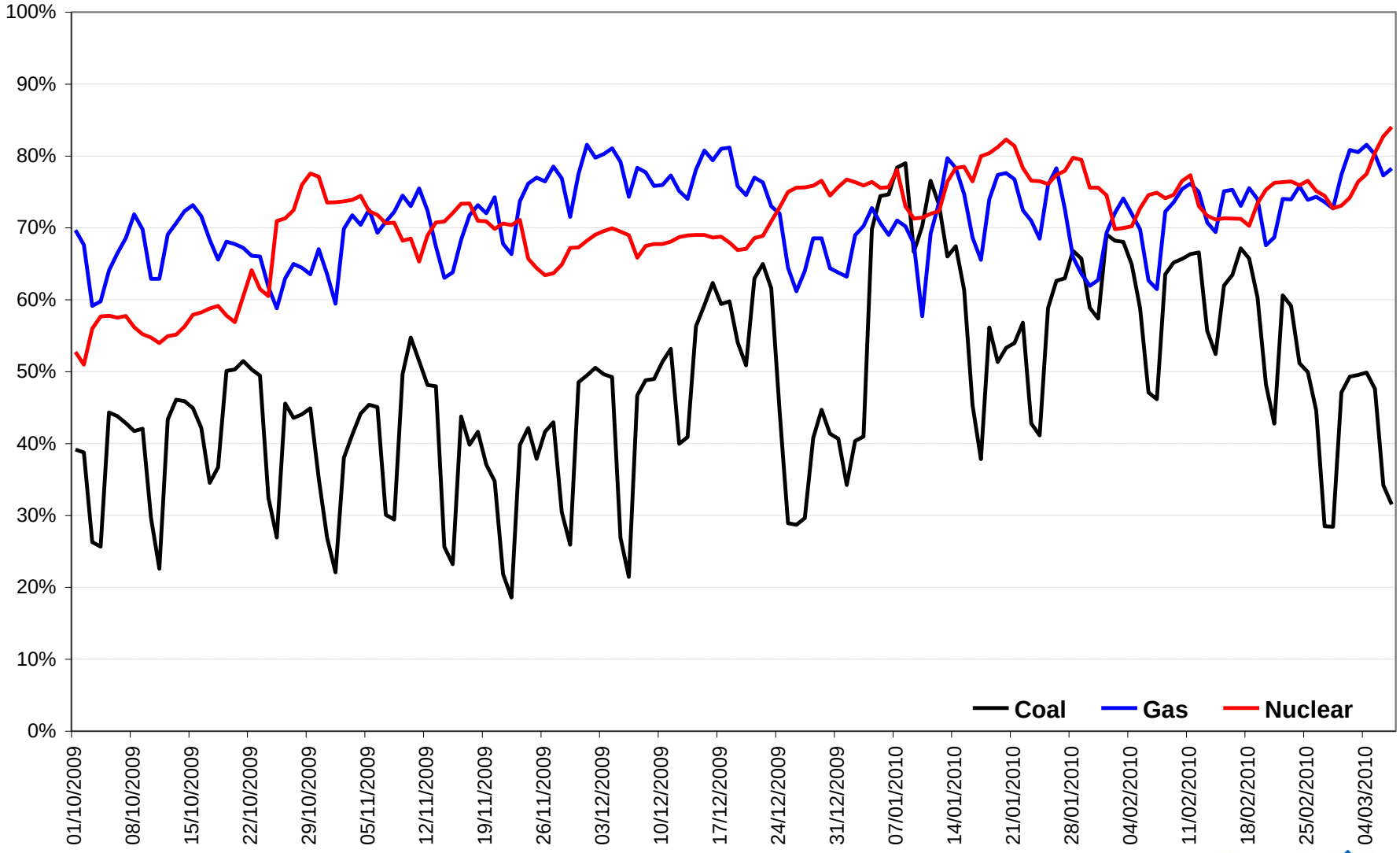
Generation load factor



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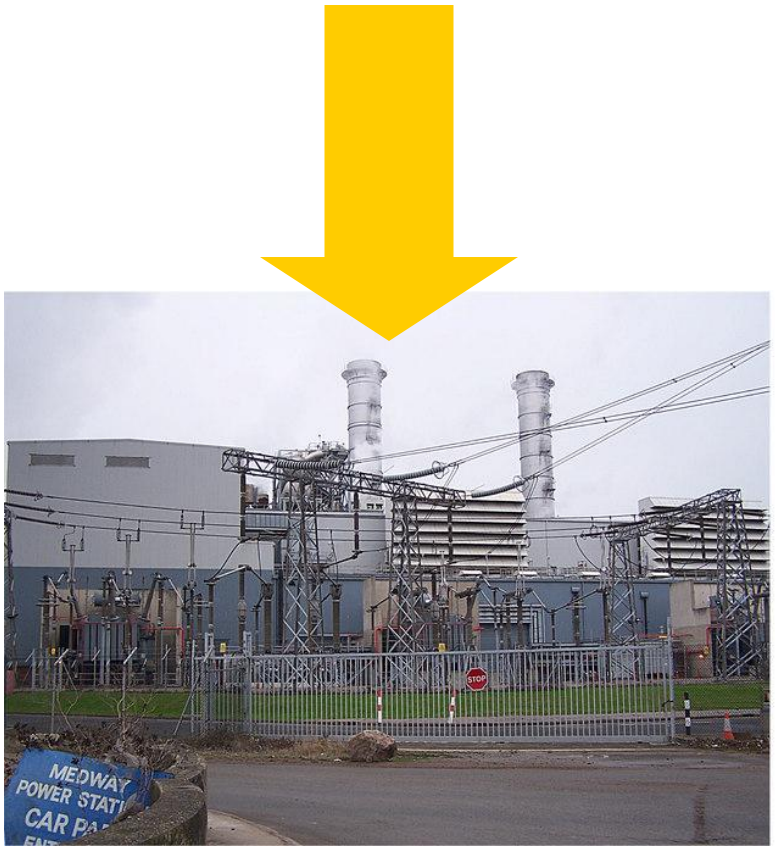
This winter and historic generation load factors

Winter Load Factor	2007/08	2008/09	2009/10*
Coal - LCPD opted out	52%	45%	22%
Coal - LCPD opted in	65%	68%	58%
Gas	69%	61%	71%
Hydro	50%	46%	33%
Imports from France	44%	38%	14%
Exports to France	17%	16%	48%
Nuclear	61%	65%	71%
OCGT	1%	1%	0%
Oil	2%	6%	0%
Wind	25%	35%	28%
Pumped Storage	16%	18%	15%

* up to 7 March 2010

Gas and power interaction in January 2010



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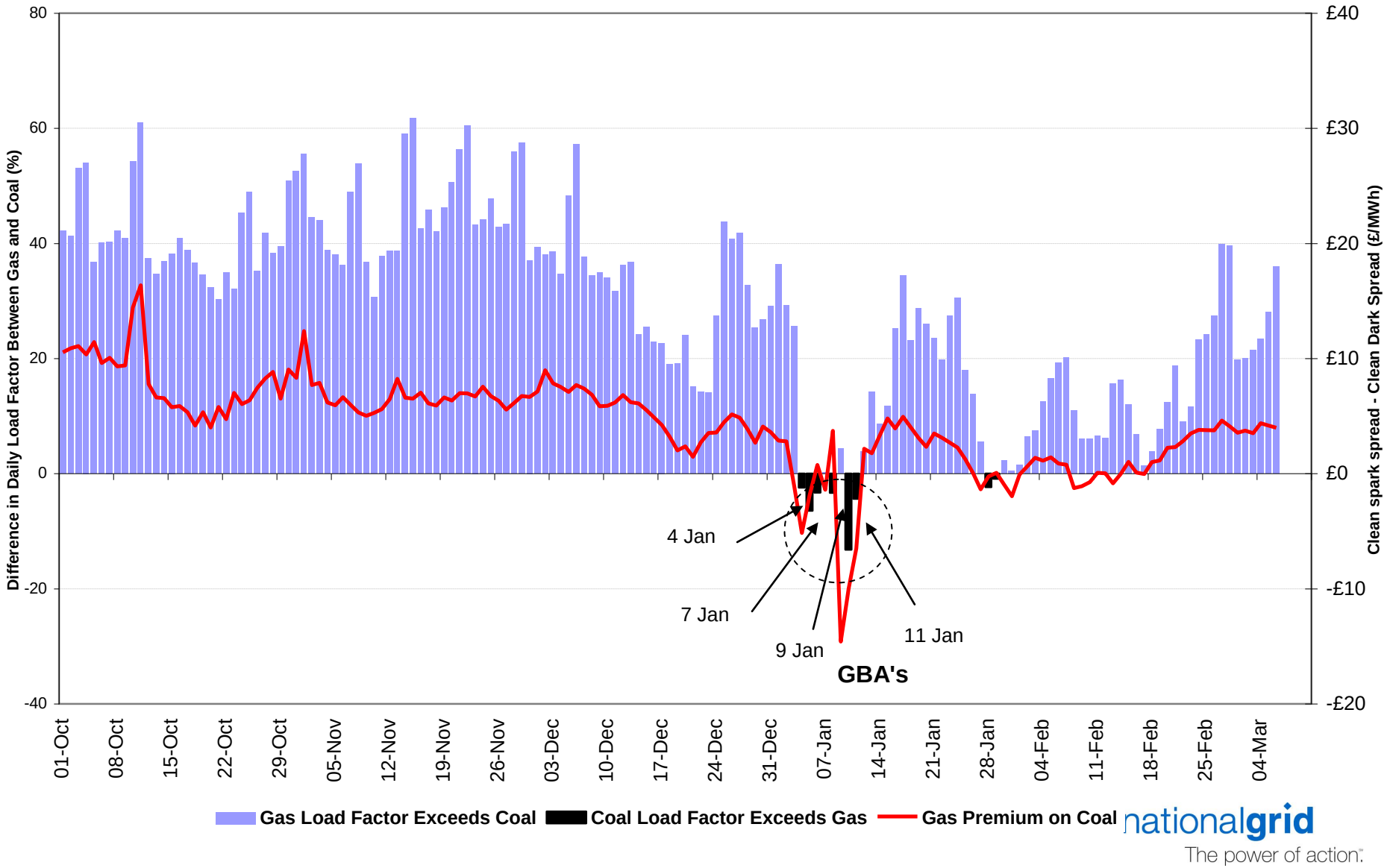
Gas vs coal generation levels



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2009/10 Winter Summary

- Gas experienced its highest demand day ever at 465 mcm/d plus 9 of 20 highest demand days on record;
  - But high demands were partly due to high power station demands – not just cold weather;
- Peak electricity demand of 59.3 GW (incl exports) occurred on 7th January 2010;
  - Peak demand this winter was similar to the peak of winter 2009/10 of 6th Jan 2009 (59.2 GW);
- "Snow Disruption" effect of low demand on Wed 6th January suppressed about 2 GW of demand as schools were closed and people stayed at home.

- Diversity of gas supply has ensured that demand has been met:-
  - Imports > UKCS on high demand days
  - Any supply losses made up by additional imports and/or storage
  - High Norwegian imports throughout winter
  - Highest ever LNG imports
  - High BBL and IUK on highest demand days
  - Significant storage recycling of Medium Range Storage sites
- Electricity demand was met with comfortable surpluses prevailing over most of winter;
  - No electricity system warnings were issued over winter;
  - On the peak demand day, we had about 3GW's of additional generation available as well as a number of pumped storage units;

- The gas and power market has responded to supply/demand/price.

Useful Links

Contact us : -

Energy.operations@uk.ngrid.com

Regular Winter Summary Information : -

http://www.nationalgrid.com/uk/Electricity/Info/winterupdates/

http://www.nationalgrid.com/uk/Gas/OperationalInfo/monthlyupdates/

Look out for our: -

Summer Outlook Report during 1st half of April

Initial Winter 2010/11 Consultation around late June

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