The technological renaissance that unlocked gas and oil from shale has gifted North America with a vast energy resource. (See Figures S1-S3 for current North American shale plays, production growth since 2000 and projected long-term supply through 2040.)

The Pacific Northwest is located adjacent to two prolific producing regions: The Western Canada Sedimentary Basin spanning Alberta and British Columbia, and the U.S. Rocky Mountain states. (See Figure S4.) More than two-thirds of the natural gas consumed in the region is sourced from Canada.

Projected growth in production in both regions is shown in Figures S5 and S6. The supply optionality resulting from Pacific Northwest consumers’ connection to these basins is shown in Figure S7.
Figure S2. U.S. Shale Propels 41% North American Production Increase from 2005-2017


Figure S3. North American Production Projected to Increase 47% from 2016-2040

Source: EIA, 2018 Annual Energy Outlook Table 13 – Natural Gas Supply, Disposition & Prices NEB, Canada’s Energy Future 2018, Reference Case Appendix – Natural Gas Supply
FIGURE S4. Source of Natural Gas for the Pacific Northwest

Source: NWGA

FIGURE S5. BC Drives Projected 38% WCSB Production Growth from 2016-2040

Source: NEB, Canada’s Energy Future 2018
* For purposes of this chart, the Alberta and British Columbia portions of the WCSB are depicted separately, hence "three" basins instead of two.

**Does not include volumes of Alberta-sourced gas shipped to the region via FortisBC’s Southern Crossing pipeline or served directly from TransCanada’s GTN pipeline.

Source: Wood Mackenzie 2018 H2, published with permission

Source: Northwest Pipeline through 12/31/2018