

North American Power

## Harvard Electricity Policy Group

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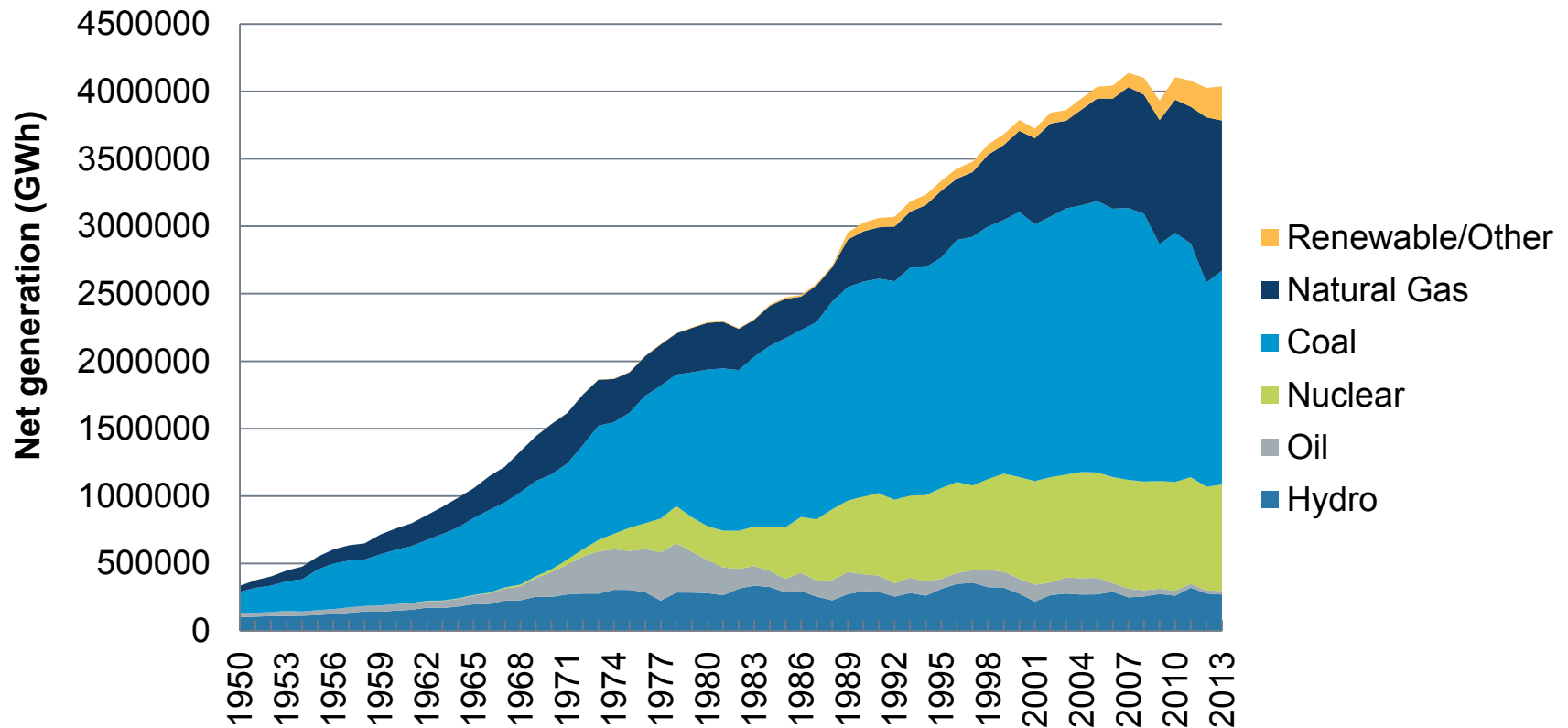


# The Value of US Power Supply Diversity

- The IHS special report “The Value of US Power Supply Diversity” was posted on IHS Connect and made available publically in July 2014.
- The value of fuel diversity is taken for granted and is a key missing piece in current strategic discussions and policy formulation.
- Current trends indicate a loss of one-third of the value of fuel diversity by 2030, and this pace may accelerate due to unresolved power market flaws and environmental market interventions.
- The current value of fuel diversity in the US power sector is around \$93 billion per year – compared to annual revenues of \$370 billion.

# US power generation: Net generation, 1950-2013

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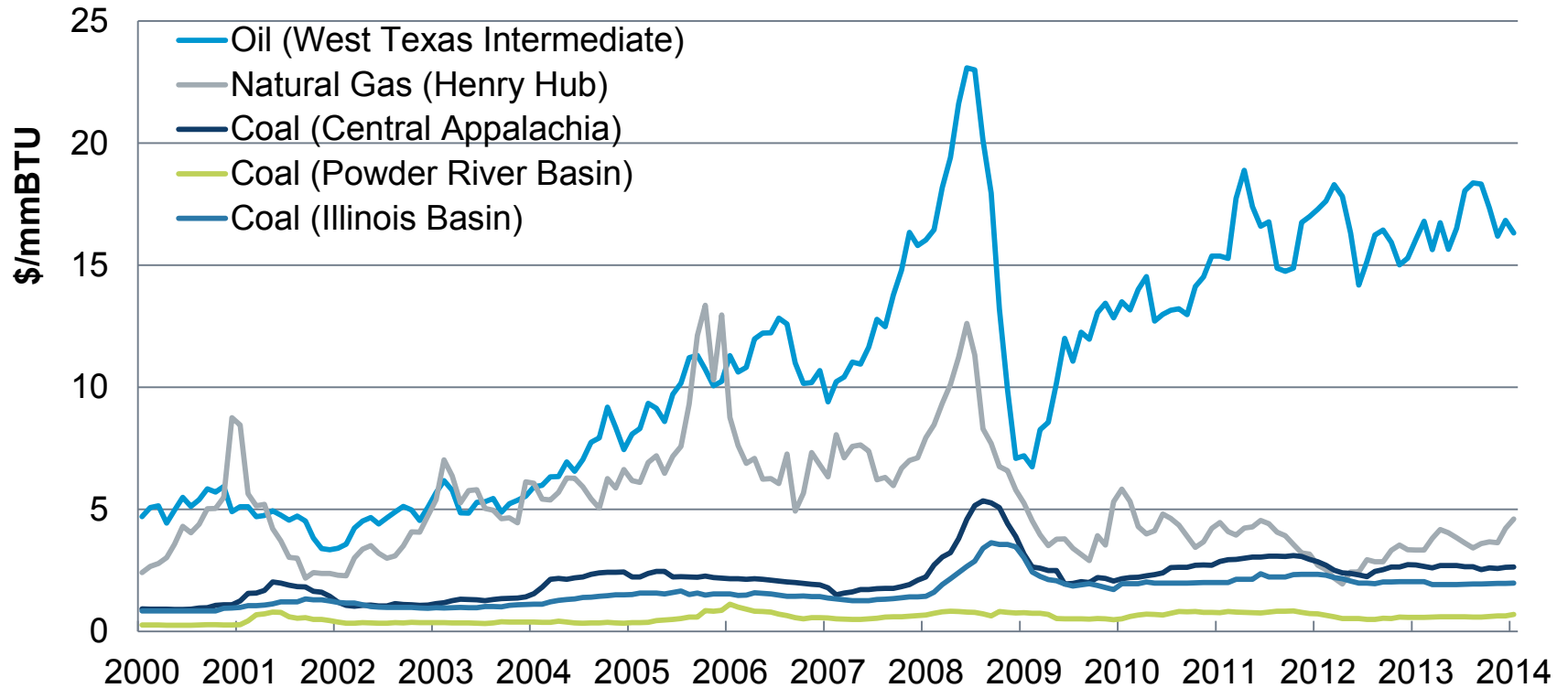
Source: IHS, US Energy Information Administration

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# Monthly spot oil, natural gas and coal prices, 2000-14 YTD

Monthly spot oil, natural gas and coal prices, 2000-14 YTD

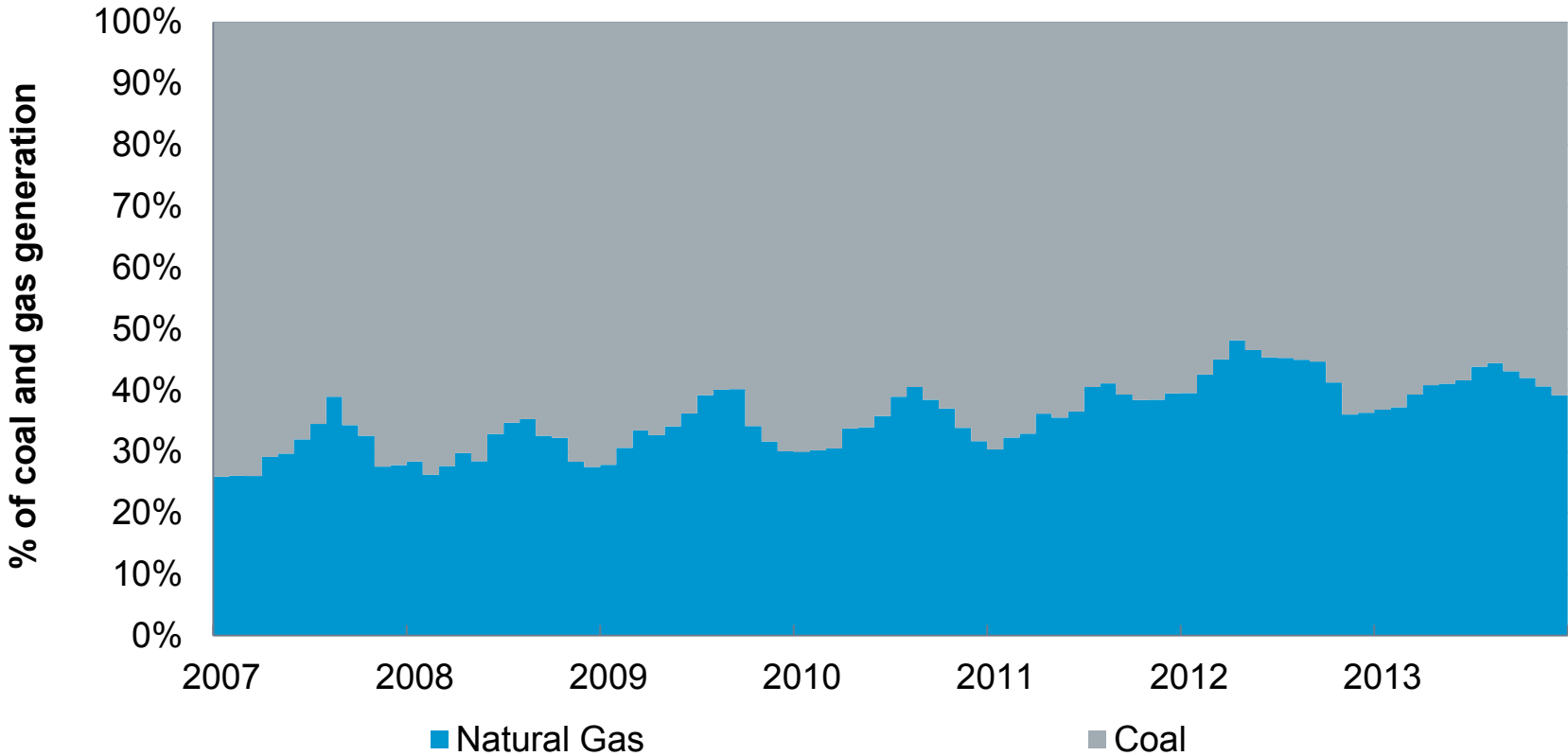


Source: IHS, Energy Information Administration, Platt's and Natural Gas Intelligence, Platts Coal Outlook, SNL Energy Coal Report © 2014 IHS



# Coal and natural gas generation, 2007-2013

Coal and natural gas generation, 2007-2013



Source: IHS

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# ISO New England generation, January 2014

