

Short-Term Energy Outlook

STEO

July 2025



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Short-Term Energy Outlook

Overview

U.S. energy market indicators	2024	2025	2026
Brent crude oil spot price (dollars per barrel)	\$81	\$69	\$58
Retail gasoline price (dollars per gallon)	\$3.30	\$3.10	\$3.00
U.S. crude oil production (million barrels per day)	13.2	13.4	13.4
Natural gas price at Henry Hub (dollars per million British thermal units)	\$2.20	\$3.70	\$4.40
U.S. liquefied natural gas gross exports (billion cubic feet per day)	12	15	16
Shares of U.S. electricity generation			
Natural gas	42%	40%	40%
Coal	16%	17%	15%
Renewables	23%	25%	26%
Nuclear	19%	18%	18%
U.S. GDP (percentage change)	2.8%	1.4%	1.9%
U.S. CO₂ emissions (billion metric tons)	4.8	4.8	4.8

Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025

Note: Values in this table are rounded and may not match values in other tables in this report.

- Global oil prices.** The Brent crude oil price in our forecast averages \$69 per barrel (b) this year, which is \$3/b higher than in last month's STEO, which was released just before the conflict over Iran's nuclear program escalated in mid-June. The increase in the forecast is driven largely by higher near-term prices due to a more significant geopolitical risk premium from the conflict. Despite the risk premium, we expect significant global oil inventories builds will put consistent downward pressure on oil prices over the forecast period, with the Brent price averaging \$58/b in 2026. This forecast was completed before [OPEC+ announced on July 5](#) that it would raise production targets for August. The announced targets are somewhat higher than the target we assumed when compiling this outlook.
- U.S. crude oil production.** Declining oil prices have contributed to U.S. producers slowing their drilling and completion activity this year. As a result, we forecast U.S. crude oil production will decline from an all-time high of just over 13.4 million barrels per day (b/d) in the second quarter of 2025 (2Q25) to less than 13.3 million b/d by 4Q26. On an annual basis, we now forecast crude oil production will average 13.4 million b/d in both 2025 and 2026.
- Ethane production and exports.** On July 2, the U.S. Commerce Department [rescinded](#) export license requirements that had effectively barred U.S. ethane exports to China. As a result, we reversed the [changes](#) to domestic ethane production and exports we were forecasting in the June STEO to align with our expectation for growing trade between U.S. ethane producers and petrochemical crackers in China. U.S. ethane exports will increase to more than 500,000 b/d in 2025 and nearly 650,000 b/d in 2026.

- Natural gas storage and prices.** Compared with our June forecast, we expect more natural gas in storage in the coming months. As a result, we reduced our forecast for natural gas prices. We forecast U.S. natural gas inventories will total 3,910 billion cubic feet at the end of the injection season in October, which is 5% more natural gas in storage than we forecast last month. As a result, we now expect the Henry Hub spot price will average about \$3.40 per million British thermal units (MMBtu) in 3Q25, down 16% from our June forecast. However, we still expect prices will rise in the coming year, with the Henry Hub price averaging almost \$3.70/MMBtu this year and \$4.40/MMBtu next year. The forecast increase largely reflects the expectation that production will fall slightly in 2026, while LNG exports continue to increase.
- Wholesale power prices.** We expect U.S. average wholesale power prices to increase by 12% this summer compared with last summer. Although natural gas prices are down compared with our June forecast, they are still higher than prices last summer. Higher natural gas prices are contributing to higher wholesale power prices. Heat waves in the remaining summer months could cause spikes in wholesale power prices.
- Trade policy assumptions.** The U.S. macroeconomic outlook we use in the *Short-Term Energy Outlook* (STEO) is based on S&P Global's macroeconomic model. S&P Global's most recent model reflects the tariffs announced in April and includes the [90-day temporary suspension of tariffs](#) granted to most countries. S&P Global projects reduced tariffs on imports from China compared with last month, but tariffs on imports from other countries are expected to remain at 10% after the 90-day pause expires in July.

Notable forecast changes

Current forecast: July 8, 2025; previous forecast: June 10, 2025

	2025	2026
Brent crude oil spot price (dollars per barrel)	\$69	\$58
Previous forecast	\$66	\$59
Percentage change	4.4%	-1.3%
U.S. ethane exports (million barrels per day)	0.51	0.64
Previous forecast	0.41	0.31
Percentage change	24.3%	106.9%
Henry Hub spot price (dollars per million British thermal units)	\$3.70	\$4.40
Previous forecast	\$4.00	\$4.90
Percentage change	-8.7%	-9.6%
U.S. natural gas inventories (billion cubic feet)	3,290	2,830
Previous forecast	3,090	2,880
Percentage change	6.6%	-1.9%

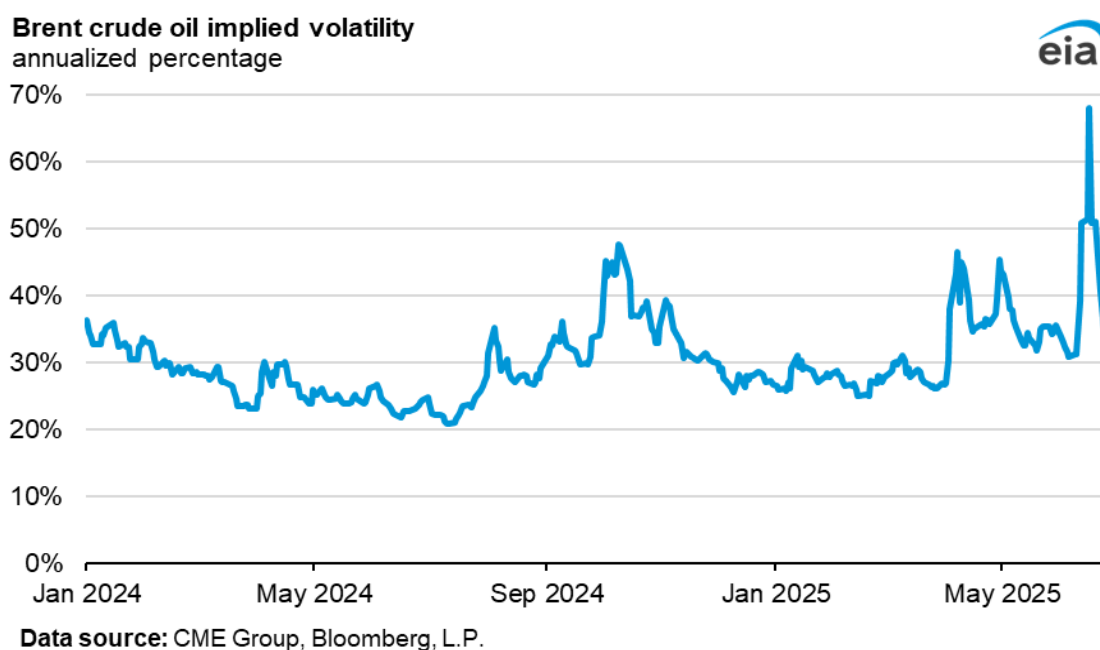
Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*
Note: Percentages and changes are calculated from unrounded values.

Global Oil Markets

Global oil prices

An increase in the geopolitical risk premium over the past month led us to raise our forecast for crude oil prices over the second half of 2025 (2H25). We completed our June forecast just before the conflict over Iran's nuclear program escalated in mid-June. Although we continue to expect rising global oil inventories will cause crude oil prices to fall from current levels, we now forecast the Brent crude oil spot price will average \$66 per barrel (b) in 2H25, almost \$5/b more than last month's forecast. Crude oil prices increased for the first time in five months in June—averaging \$71/b— primarily due to concerns oil supplies could be disrupted by if the conflict over Iran's nuclear program during mid-June escalated.

The potential for higher oil prices over the second half of this year reflects the importance of the Strait of Hormuz to global oil supply. [An estimated 20% of global petroleum consumption is shipped through the Strait of Hormuz](#), and concerns among market participants about its potential closure caused a spike in oil prices and volatility. Brent crude oil spot prices increased sharply from \$71/b on June 12 to \$80/b at the height of the conflict on June 19 as the market responded to [reports that Iran was considering closing the Strait of Hormuz](#). However, prices dropped back below \$70/b in subsequent days as the conflict de-escalated.



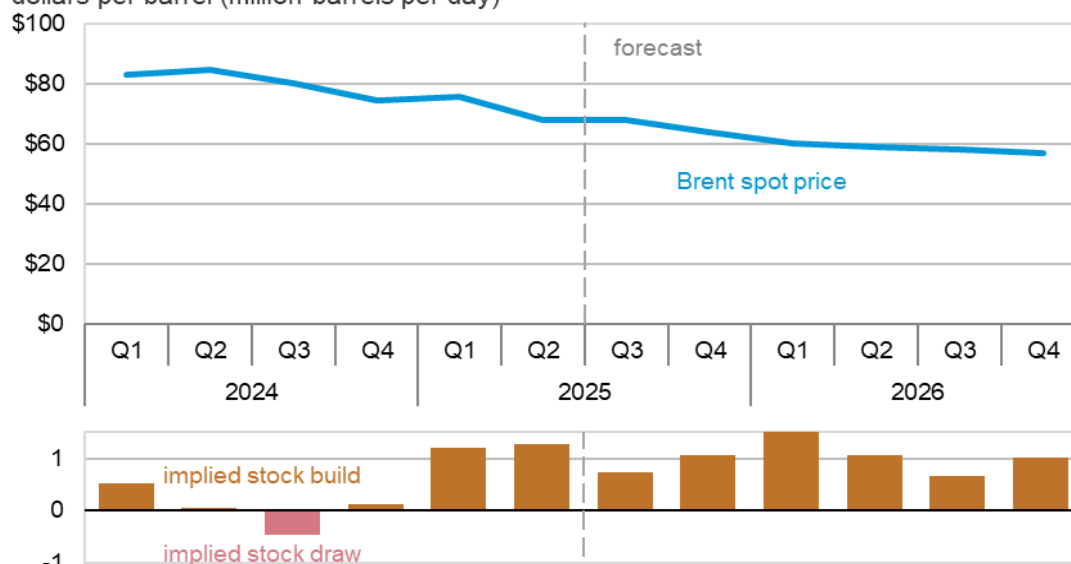
High [implied volatility](#)—a measure of market participants' expectations for the range of crude oil futures price changes—suggests considerable market uncertainty about the potential impacts the conflict could have on oil prices. Before Israel launched strikes on Iran on June 13, crude oil implied volatility averaged 33% in June, based on futures and options contract data from the CME Group. Implied volatility sharply increased with news of the conflict, and daily Brent crude oil implied volatility reached 68% on June 17, which was the highest level since March 2022, the onset of Russia's full-scale invasion of Ukraine.

Just as quickly, implied volatility fell to 35% on June 25 once it appeared a ceasefire announced after the United States bombed key nuclear sites in Iran was holding.

Similarly, crude oil prices have nearly returned to levels before the onset of the conflict, falling to \$68/b on June 25. Although some energy facilities in Iran were damaged, no significant disruptions to regular oil flows in the region have occurred. Despite the announced ceasefire, significant uncertainty remains around the possibility of tensions escalating again. The potential for supply disruptions has increased and is likely still reflected in a small risk premium on oil prices, which has led us to raise our oil price forecast for 2H25.

Brent crude oil spot price and global inventory changes

dollars per barrel (million barrels per day)



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025

Although the geopolitical risk premiums have risen, we still anticipate global oil inventories will grow significantly over the forecast period and put downward pressure on oil prices. Global oil inventories increased by an estimated 1.2 million barrels per day (b/d) in 1H25, and we expect they will increase by an average of 0.9 million b/d for the remainder of the year. We expect global oil inventory builds will average 1.1 million b/d in 2026. We expect Brent crude oil prices will average \$69/b this year, \$3/b higher than in last month's STEO. This increase is largely driven by higher near-term prices due to the existing risk premium from the Israel-Iran conflict. Brent crude oil prices will average \$58/b next year as significant increases in global oil inventories put consistent downward pressure on oil prices.

As noted, significant uncertainty remains in our price forecast. Although we don't currently forecast any major supply disruptions, risks to oil supply remain. A break in the Israel-Iran ceasefire and elevated tensions in the ongoing Russia-Ukraine conflict have the potential to disrupt supply. In addition, uncertainty around the status of ongoing trade negotiations between the United States and its trading partners could weigh heavily on oil prices going forward. Lastly, future OPEC+ decisions and its members' compliance with production targets are still uncertain given the growth in oil supply from sources outside of OPEC+ and the continued weakness in oil prices.

Global oil production and consumption

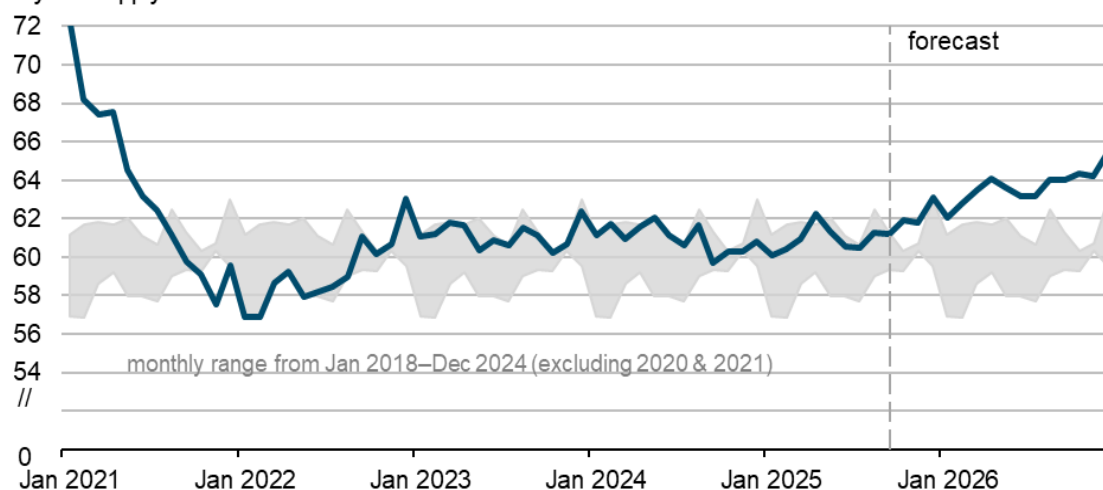
Forecast global liquid fuels consumption increases by 0.8 million b/d in 2025 and 1.1 million b/d in 2026, driven almost entirely by demand from non-OECD countries. Total non-OECD oil consumption grows by 0.9 million b/d in 2025 and 1.0 million b/d in 2026, while OECD oil consumption falls by 0.1 million b/d in 2025 and is largely unchanged in 2026. Most non-OECD growth is concentrated in Asia. We forecast liquid fuels consumption in India increases by 0.5 million b/d over the next two years and in China by 0.4 million b/d through 2026.

The planned increases to OPEC+ production combined with strong supply growth outside of OPEC+ continue to drive strong growth in global liquid fuels production in our forecast. We now forecast global liquids fuels production rises by 1.8 million b/d in 2025, before increasing by another 1.1 million b/d in 2026. We still expect total liquids production growth in our forecast will be led by countries outside of OPEC+. We expect the United States, Brazil, Canada, and Guyana will drive production growth over the forecast period, with production from countries outside of OPEC+ increasing by 1.3 million b/d in 2025 and by 0.5 million b/d in 2026.

Organization for Economic Cooperation and Development (OECD)

commercial inventories of crude oil and other liquids

days of supply



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025



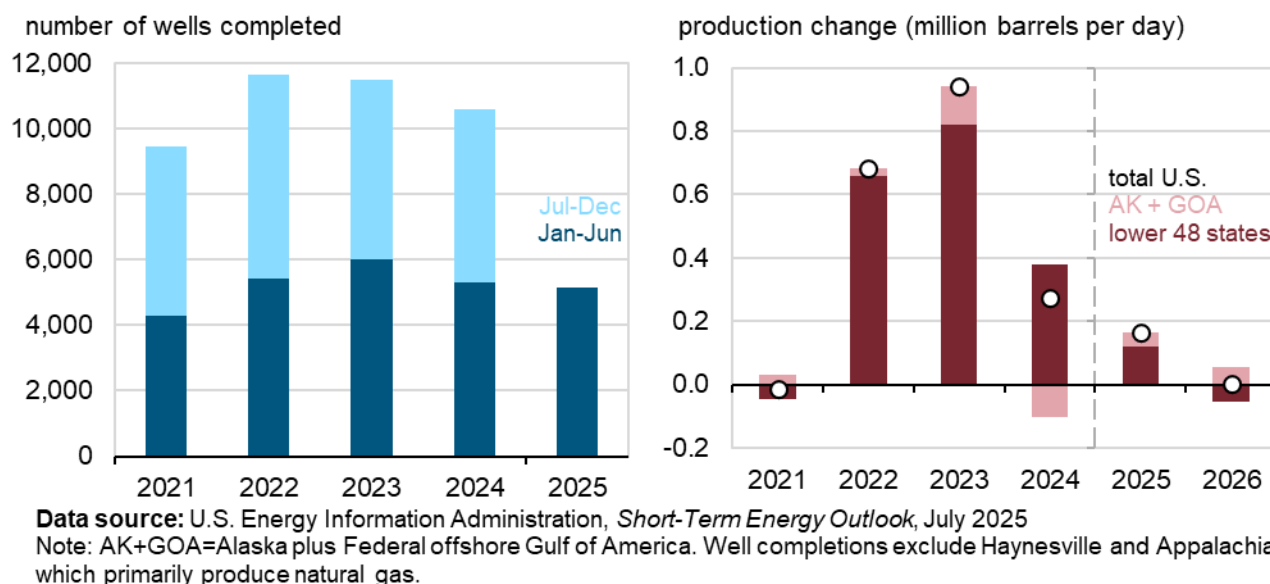
The combination of relatively weak oil demand growth and strong global oil supply growth is reflected in our expectation of increasing OECD commercial inventories on a days-of-supply basis. Days of supply is a measure of how much oil is available in storage to meet forecast oil demand if any short-term disruption to oil supplies occurs. We estimate OECD commercial inventories averaged 61 days of supply in 1H25, and they will increase to an average of 62 days in 2H25 and reach 66 days by the end of 2026, which is well above the range from 2018–2024 (excluding 2020 and 2021 when inventories were high and demand was low because of the COVID-19 pandemic).

U.S. Petroleum Products

U.S. crude oil production

We forecast U.S. crude oil production will generally decline from almost 13.5 million barrels per day (b/d) in April 2025 to 13.3 million b/d by the end of 2026, practically unchanged from our June STEO. The drop in U.S. crude oil production reflects our expectation that the WTI crude oil spot price will fall through 2026, ending the year at \$53 per barrel (b), a decline of about 22% from the June 2025 price. Declining prices mean U.S. oil producers will drill and complete fewer wells.

U.S. crude oil production and well completions



U.S. producers have slowed drilling and completion activity this year. In 1H25, well completions in the oil-producing regions of the Lower 48 states totaled 5,164 wells. This number excludes Alaska and the Gulf of America, which do not produce tight oil and are subject to different investment and production cycles. It also excludes Haynesville and Appalachia, which primarily produce natural gas. This year had the fewest completions in the first six months of any year since 2021.

Last year, higher oil [output per well](#) meant that U.S. crude oil production grew despite relatively low well completions. This year, productivity growth has been mixed; crude oil production from newly completed wells is growing more slowly or declining in the major oil-producing regions. We assess the muted productivity growth will be insufficient to offset the low drilling and completion activity observed in the falling rig count and number of wells completed.

With falling crude oil prices in our forecast, we expect recent downward trends in rig counts and well completions to continue. We estimate that U.S. producers would have to complete more than 5,400 wells in 2H25 to match the number of wells completed in all of 2024. About the same number of wells (5,500) were completed in 2H23 when oil prices were much higher.

U.S. distillate consumption

Lower economic growth in 2025 than we initially expected at the beginning of the year has led to less consumption of distillate fuel both in history and in our forecast. In our current STEO, we expect U.S. distillate consumption will decline 30,000 b/d in 2H25 compared with 2H24. In our January STEO, we forecast distillate consumption to grow by 80,000 b/d in 2H25. Similarly, in our January STEO, we forecast growth of about 190,000 b/d in 1H25 compared with 1H24. However, U.S. distillate consumption declined about 10,000 b/d.

Historically, economic growth and distillate consumption are positively correlated. The decline in distillate consumption this year has been driven by a slowdown in industrial activity and amplified by general economic uncertainty.

The most recent data from the Bureau of Economic Analysis shows U.S. real GDP [decreased](#) at an annual rate of 0.5% in 1Q25, and we estimate it increased by 1.1% in 2Q25, based on forecasts from S&P Global. Our January STEO assumed forecast growth of 1.7% in 1Q25 and 1.8% in 2Q25. Our reduced GDP growth forecast in the July STEO contributes to our forecast that distillate consumption this year will decline compared with 2024. We anticipate distillate consumption will grow by about 30,000 b/d in 2026.

U.S. GDP and distillate consumption

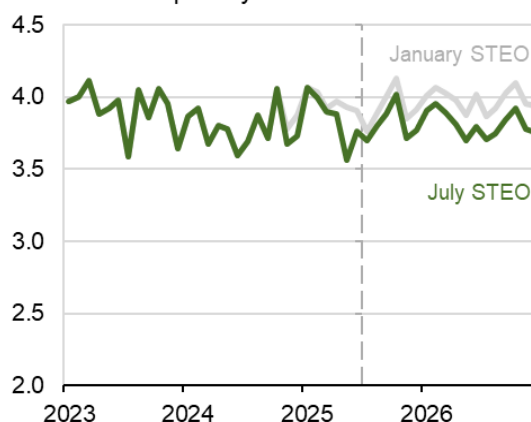
Real GDP

percentage change



Distillate consumption

million barrels per day



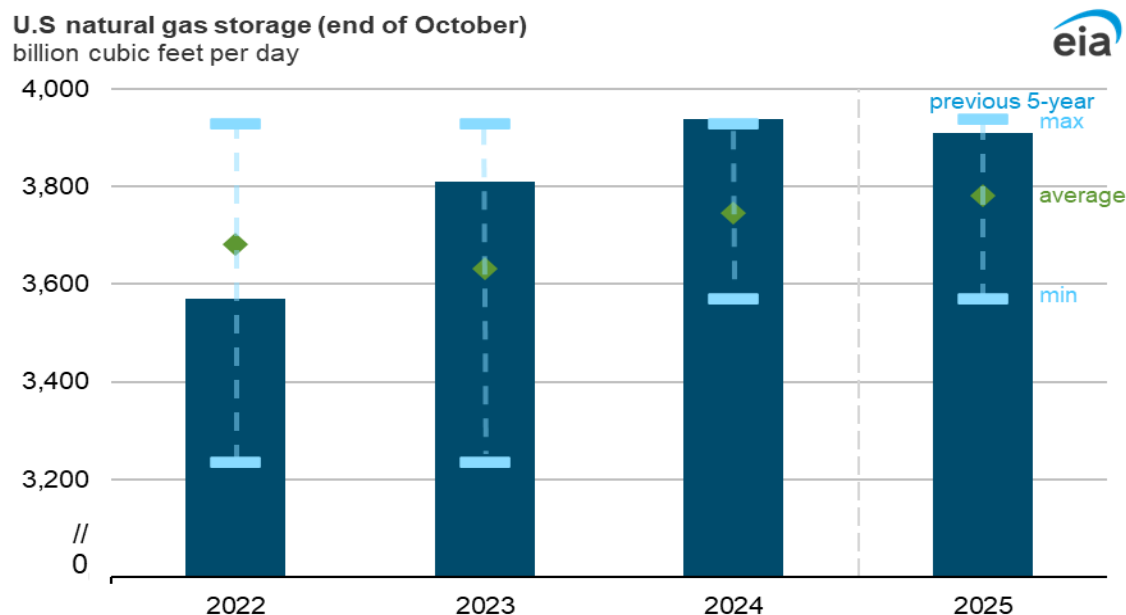
Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook (STEO)*, July 2025

The latest Institute for Supply Management's [Manufacturing Purchasing Managers Index \(PMI\)](#), a survey of U.S. purchasing and supply executives, contracted in May for the third consecutive month. This contraction indicates that economic activity in U.S. manufacturing is slowing down. This slowdown is consistent with trucking activity, measured by the [American Trucking Association For-Hire Truck Tonnage Index](#), which decreased by 1.3% from May last year, the first year-on-year decrease in 2025.

Natural Gas

Natural gas storage

Compared with our June forecast, we expect more natural gas in storage in the coming months because of slightly more natural gas production and less power sector demand. As a result, we reduced our forecast for natural gas prices. Our forecast for more natural gas in storage and lower prices comes after seven consecutive weeks (from late April to early June) of net injections greater than 100 billion cubic feet (Bcf) contributed to a recovery in storage volumes. We estimate that U.S. natural gas inventories were 7% above the five-year average (2020–2024) at the end of June after ending the withdrawal season (November–March) 4% below the five-year average, the [lowest in three years](#). Injections have exceeded the five-year average as U.S. natural gas production has increased in the 2Q25 compared with 1Q25. We expect inventories will end the injection season on October 31 with 3,910 Bcf of natural gas in storage, 5% more than we forecast in last month’s STEO and 3% more than the five-year average.

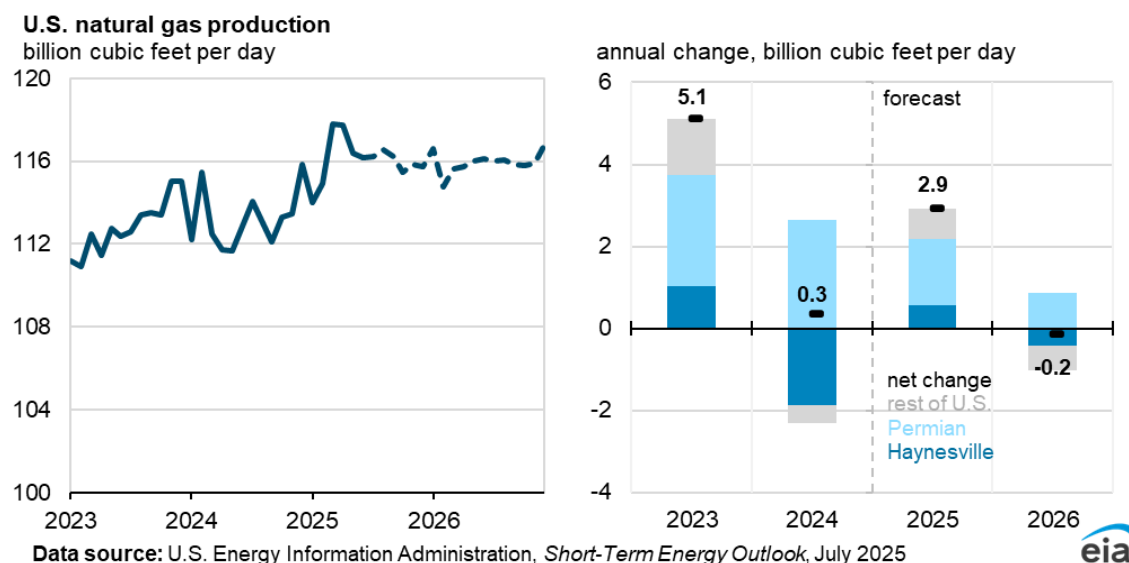


With more natural gas in storage in this forecast, we expect lower natural gas prices. The Henry Hub spot price averaged just over \$3.00 per million British thermal units (MMBtu) in June, and we expect it will average just almost \$3.40/MMBtu in 3Q25, 16% less than last month’s forecast. LNG demand and natural gas production will be two key drivers of price in the coming months. If LNG demand is more or production is less than our forecast, inventories may end the injection season below our forecast and natural gas prices may be higher than forecast. At the same time, with [above-normal hurricane activity](#) expected this summer, LNG exports may be disrupted if storms hit along the Gulf Coast, which could result in more U.S. inventories and lower natural gas prices than expected.

Natural gas production

Marketed natural gas production averaged 116.8 billion cubic feet per day (Bcf/d) in 2Q25, a 4.7 Bcf/d increase compared with the same period in 2024. We expect production to remain near this level

through 2026, averaging around 116 Bcf/d in both 2025 and 2026. Higher natural gas prices throughout 2025 compared with last year have supported this sustained production. The U.S. benchmark Henry Hub spot price averaged \$3.67/MMBtu in 1H25, compared with \$2.11/MMBtu in 1H24.



Although production in our forecast remains relatively flat going forward, we forecast U.S. marketed natural gas production will increase almost 3% this year compared with 2024, largely because of rising production in the first half of the year. This increase is driven mainly by the Permian region, which we expect to produce 27.0 Bcf/d in 2025, or 6% more than in 2024, along with increases in the Appalachia and Haynesville regions. We forecast U.S. marketed natural gas production will remain flat in 2026 as production growth from the Permian and Appalachia regions will offset the overall decline in production from the rest of the United States.

Electricity, Coal, and Renewables

Renewables summer generation

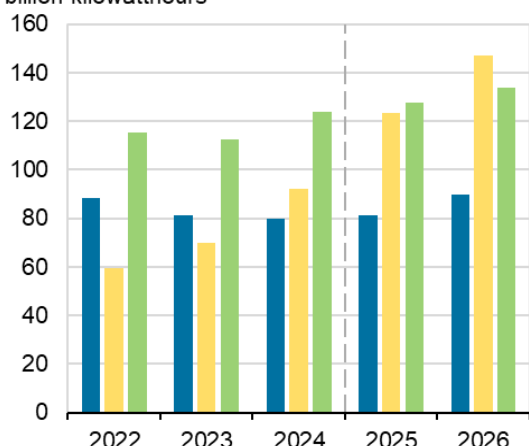
Solar generation has grown quickly in the past few years as more capacity is installed, a trend we expect to continue this summer. We expect the electric power sector will generate 124 billion kilowatthours (BkWh) of electricity from solar this summer (June–September), 34% more than last summer. Among renewable sources, solar would generate the second most electricity behind wind. We forecast solar generation from the electric power sector this summer will exceed hydropower generation by around 50%. Last summer, solar generation exceeded hydropower generation for the first time, by 15%. Hydropower generation has historically contributed about 6% of the generation mix, and we expect it to retain that share through the forecast period. Solar generation in our forecast accounts for 7% of total generation in 2025 and 8% in 2026.

By summer 2026, we forecast solar generation will grow by another 19% to 147 BkWh, which means solar would surpass wind to become the leading source of renewables generation during the summer.

The growing generation from solar has displaced some natural gas generation in some areas. With higher generation from renewables and increased fuel costs, we expect U.S. natural gas generation will fall by 4% in 2025 followed by an increase of 2% in 2026.

U.S. renewables summer generation

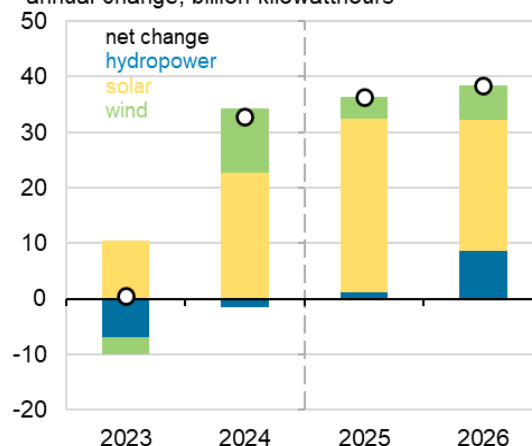
billion kilowatthours



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025

Note: Hydropower excludes pumped storage generation.

annual change, billion kilowatthours



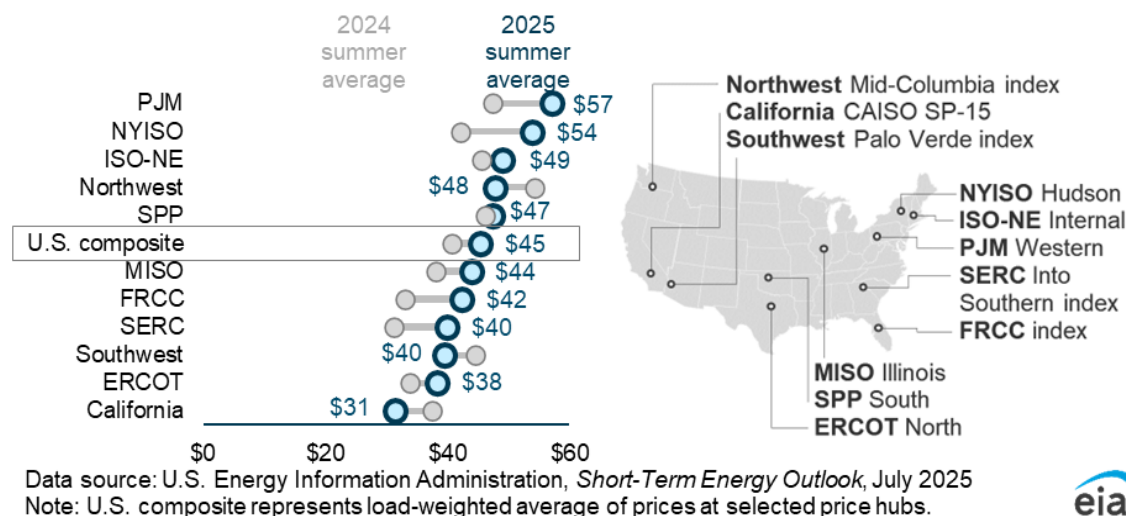
Wholesale power prices

Because U.S. natural gas prices are higher than they were last summer, we expect average wholesale power prices this summer will exceed last summer's prices in most regions. Although we expect temperatures for the rest of the summer to be slightly lower on average compared with last summer, any additional heat waves in the remaining summer months could continue to cause wholesale power prices to spike.

The composite wholesale electricity price for the price hubs reported in the STEO averages \$45 per megawatthour (MWh) for this summer, which is 12% higher than last summer.

We forecast the highest wholesale power prices will be in the PJM, New York-ISO (NYISO), and ISO-New England (ISO-NE) regions. We expect PJM to have the highest wholesale power prices this summer, at \$57/MWh, which is \$10/MWh higher than last summer. We forecast wholesale power prices in NYISO and ISO-NE to reach \$54/MWh and \$49/MWh, respectively. These regions and others in the eastern United States experienced [an early summer heat wave the last week of June](#). Wholesale electricity prices in Electric Reliability Council of Texas (ERCOT) this summer are forecast to be \$38/MWh, a \$4/MWh increase from last summer.

Average summer wholesale electricity prices at selected price hubs (Jun-Sep)

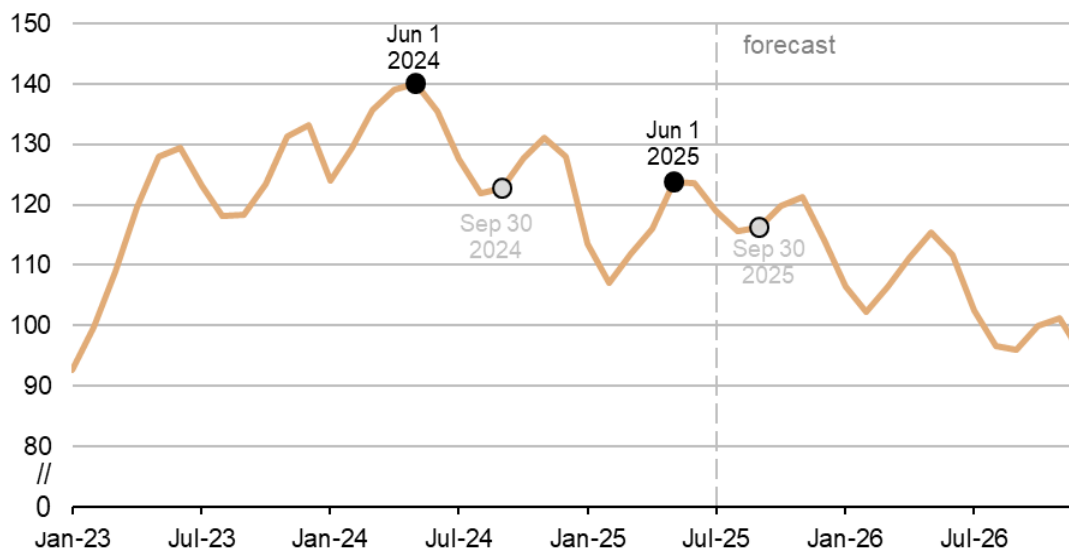


Coal markets

In our forecast, coal consumption in 2025 increases more than coal production, leading to a decline in coal inventories. We estimate that coal inventories held by the U.S. electric power sector totaled 124 million short tons (MMst) at the beginning of this summer (June 1), which is 12% lower than the same time last year. Lower inventories this year were largely the result of a larger-than-average stock drawdown in the first quarter of 2025 (1Q25). The electric power sector consumed 109 MMst of coal in 1Q25, up 20% from 1Q24, while the United States produced just 2% more coal in 1Q25 than in 1Q24.

U.S. monthly electric power sector coal inventories

million short tons



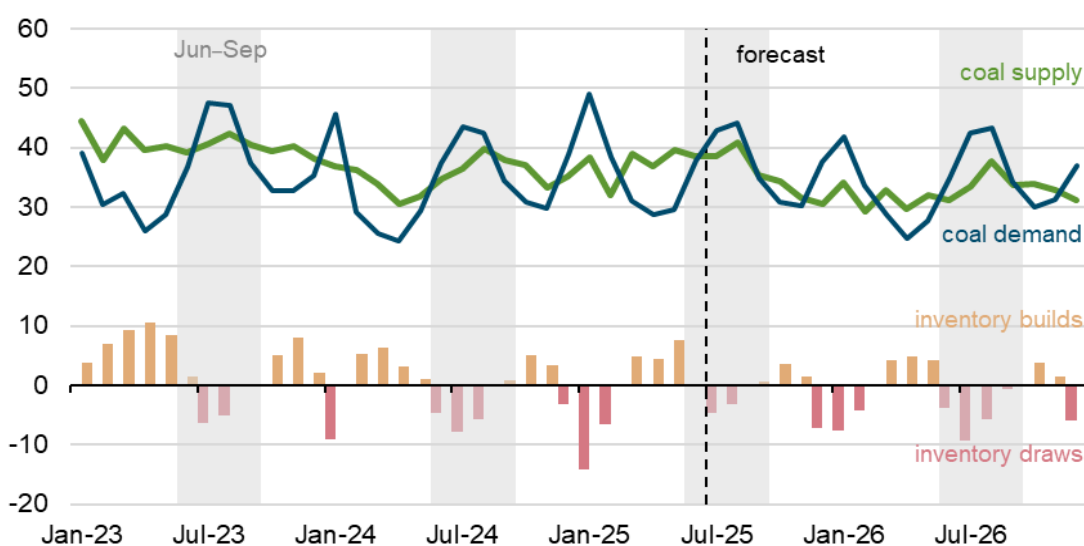
Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025

During the summer months, coal stockpiles typically fall as demand from power generators rises, though we expect inventory declines to decline less this summer compared with last summer's decline.

Hot weather at the end of June increased total U.S. power generation, which led to a slight increase in coal-fired generation compared with June 2024. However, based on forecasts from the National Oceanic and Atmospheric Administration, we expect July 2025 will be a bit milder than July 2024, mostly offsetting the increase in power sector consumption from June. Overall, we forecast U.S. coal production and consumption during the summer months of 2025 (June–September) will be about the same as last summer. Despite relatively little change in production and consumption, we expect fewer U.S. coal exports this summer will moderate stock draws. We forecast power sector coal stockpiles will fall by 8 MMst for summer 2025 (with stocks ending September at 116 MMst) compared with drawdown of 17 MMst last summer.

However, we expect inventory declines to again pick up pace in 2026, when we expect coal production to drop by 9% from this year and coal consumption to drop 6%.

U.S. monthly coal supply, demand, and electric power inventory changes
million short tons



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, July 2025

Economy, CO₂, and Weather

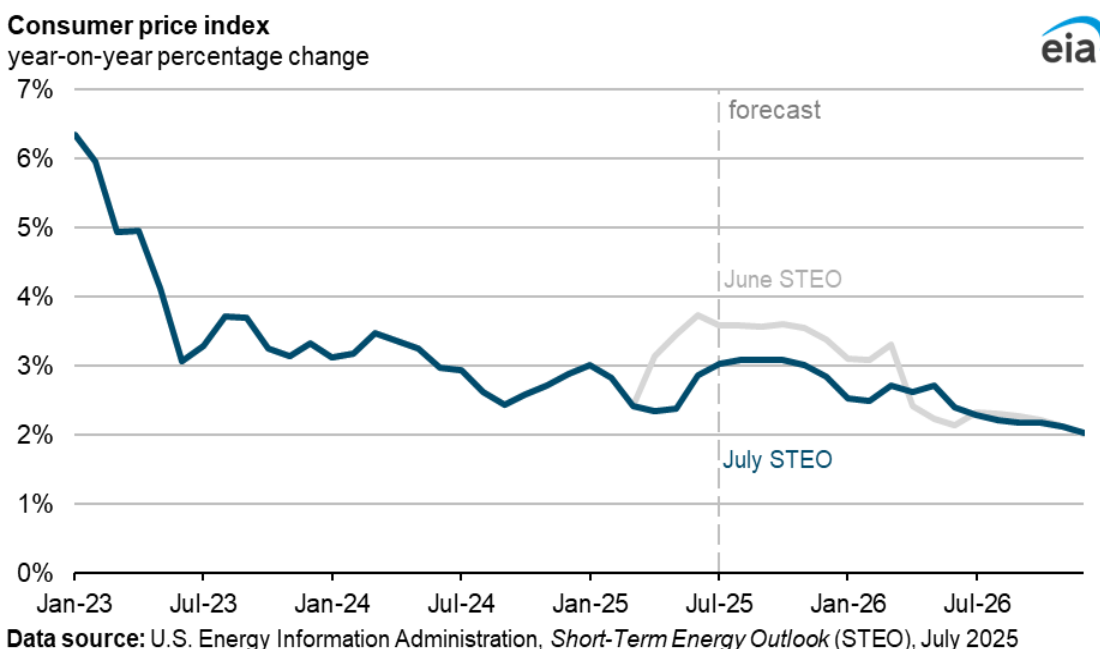
U.S. macroeconomics

This month's forecast assumes real GDP will grow at an annual rate of 1.4% in 2025 and 1.9% in 2026. The 2025 forecast remains unchanged from last month, and the 2026 forecast has been revised upward by 0.2 percentage points.

The macroeconomic assumptions in the STEO are based on S&P Global's macroeconomic model. We incorporate STEO energy price forecasts into the model to obtain the final macroeconomic assumptions.

The current forecast reflects the U.S. Bureau of Economic Analysis's (BEA) [second estimate](#) for 1Q25 GDP growth, which showed a contraction of 0.2%. This estimate represents an upward revision of 0.1 percentage points compared with the 0.3% contraction from the [advance estimate](#). BEA's [third](#)

[estimate](#), which came out after S&P updated its macroeconomic model for the month, showed a contraction of 0.5% in 1Q25.



A downward revision to the inflation forecast, due to easing trade tensions between China and the United States, contributed to the more optimistic macroeconomic outlook compared with last month's forecast. The forecast now assumes that inflation, measured as the year-over-year percentage change in the Consumer Price Index, will peak at 3.1% from August through October 2025, which is lower than the 3.7% peak in June projected in last month's forecast.

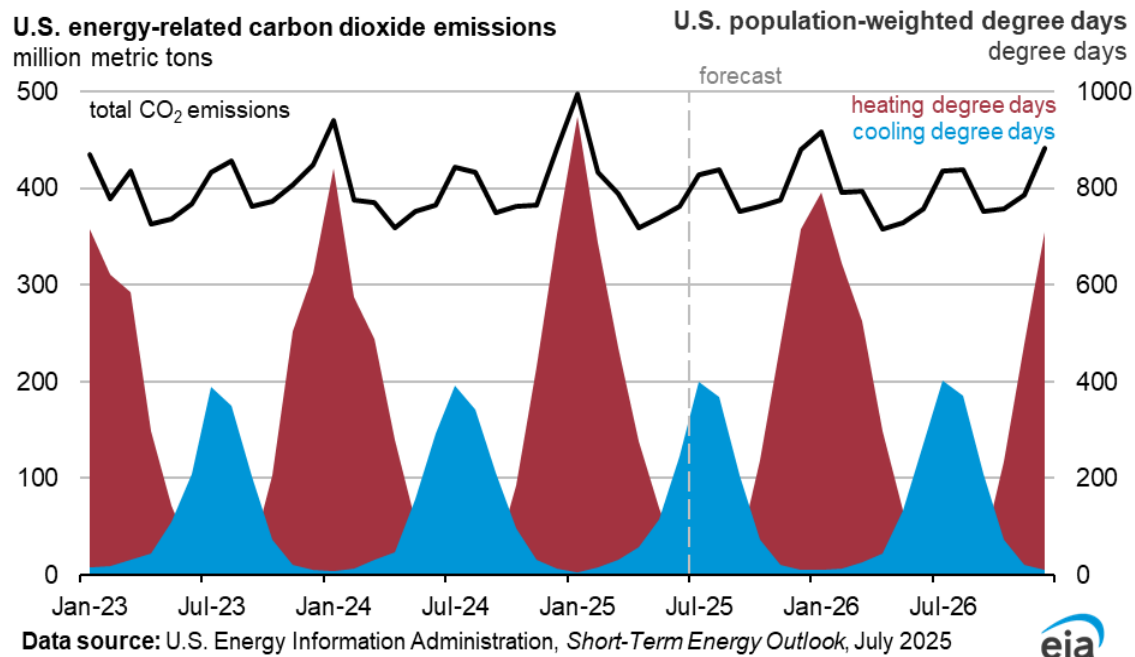
S&P Global expects reduced tariffs on imports from China compared with last month, and tariffs on imports from other countries to remain at 10% after the 90-day pause expires in July. Future trade policy and its potential macroeconomic effects continue to be a source of uncertainty in our outlook.

Emissions

We forecast U.S. energy-related carbon dioxide (CO₂) emissions to increase by 1.3% in 2025, followed by a decrease of 1.3% in 2026. Changes in emissions from coal drive the overall change in emission in both forecast years.

At the monthly level, we expect increased CO₂ emissions—of about 8% between June and July 2025—as we progress into the summer season. We expect August emissions to remain near July levels before declining in September and into the fall season. These trends are consistent with historical emissions data, which exhibit seasonal peaks in both the summer and winter months. Peaks in the summer months are mostly from the electric power sector and are associated with increased electricity use for space cooling. We measure demand for space cooling in [cooling degree days \(CDD\)](#). Peaks in winter months occur mostly in the residential and commercial sectors and are associated with increases in demand for space heating. We measure demand for space heating in [heating degree days \(HDD\)](#).

Although both summer and winter emissions are higher than spring and fall emissions, the winter emissions peak is typically higher than the summer peak. This difference occurs for a variety of reasons, such as total energy consumption for space heating compared with space cooling or differences in the emissions intensity of heating versus cooling, which may vary by state or region.



Weather

Despite heat waves across the country at the end of June, the United States averaged more than 460 CDDs during 2Q25, 7% fewer than in 2Q24. Based on our current forecasts and data from the National Oceanic and Atmospheric Administration, we expect around 360 CDDs in July, 7% fewer than in July 2024 and 3% fewer than the 10-year monthly average. Fewer CDDs mean we are likely to have a slightly cooler summer (June–September) in 2025 than summer 2024. Overall, our forecast assumes the United States will average about 1,560 CDDs in 2025, 5% fewer than in 2024, which had higher-than-average temperatures.

Short-Term Energy Outlook

Chart Gallery

July 8, 2025

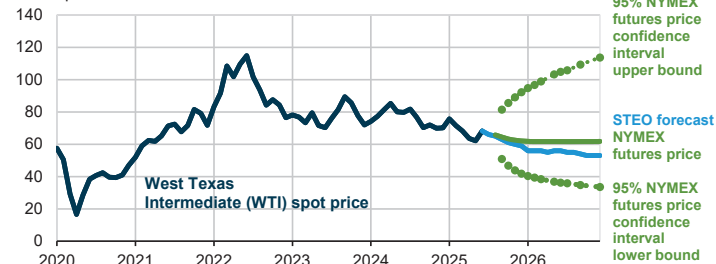


U.S. Energy Information Administration

Independent Statistics and Analysis

www.eia.gov

West Texas Intermediate (WTI) crude oil price and NYMEX confidence intervals
dollars per barrel

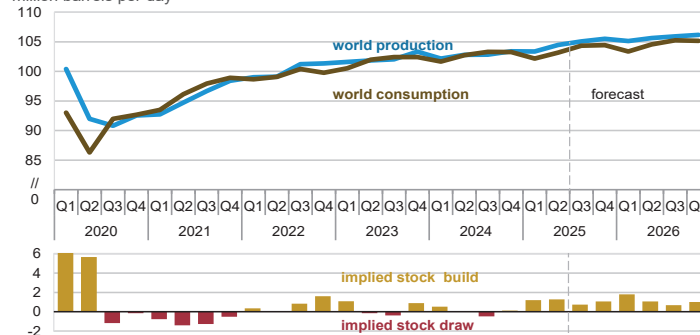


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025, CME Group, Bloomberg, L.P., and Refinitiv an LSEG Business

Note: Confidence interval derived from options market information for the five trading days ending July 2, 2025. Intervals not calculated for months with sparse trading in near-the-money options contracts.



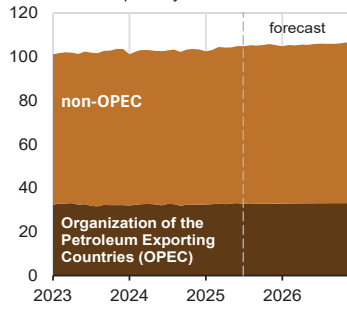
World liquid fuels production and consumption balance
million barrels per day



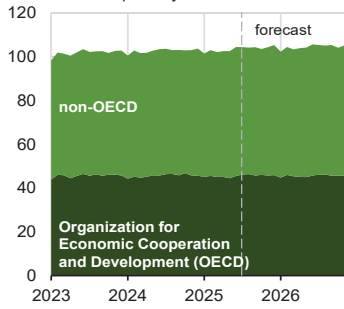
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



World liquid fuels production
million barrels per day



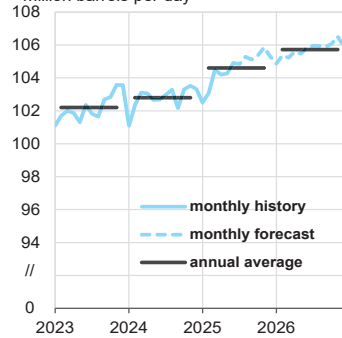
World liquid fuels consumption
million barrels per day



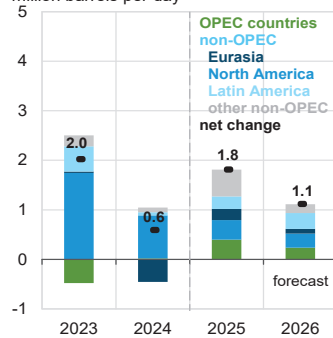
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



World crude oil and liquid fuels production
million barrels per day



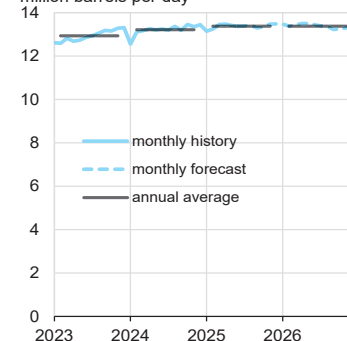
Components of annual change
million barrels per day



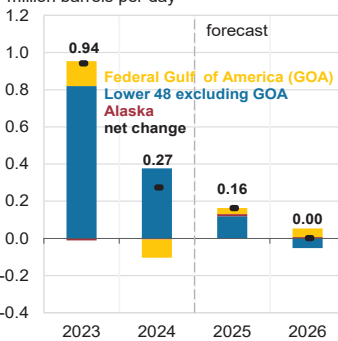
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



U.S. crude oil production
million barrels per day



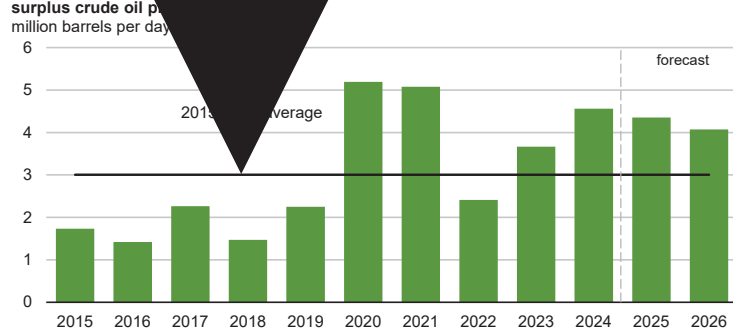
Components of annual change
million barrels per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



Organization of the surplus crude oil production of OPEC Countries (OPEC)

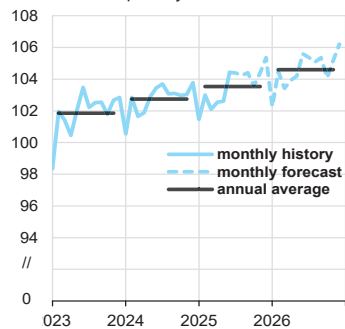


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

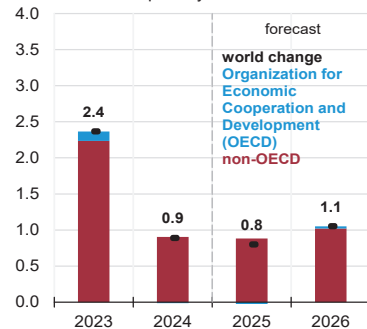
Note: Black line represents 2015-2024 average (3 million barrels per day).



World liquid fuels consumption



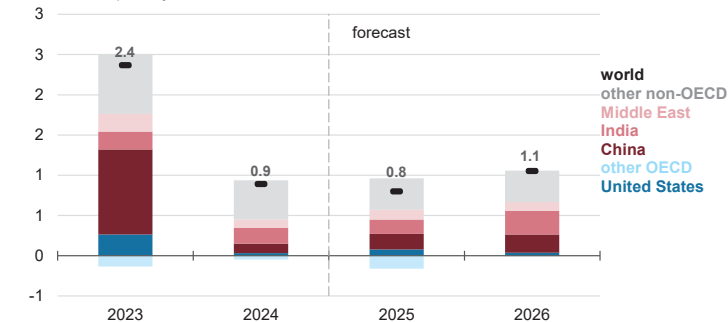
Components of annual change



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



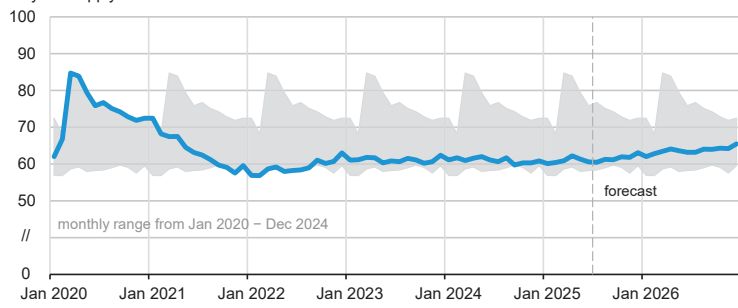
Annual change in world liquid fuels consumption



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



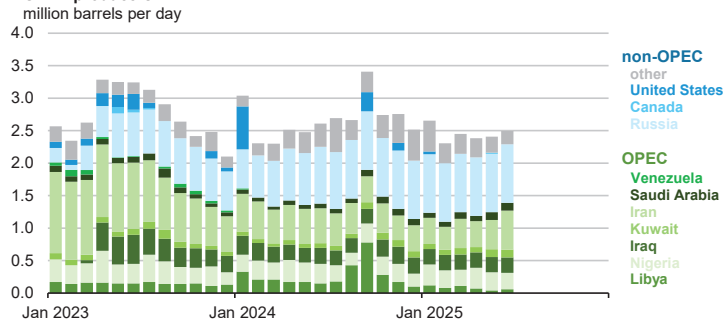
Organization for Economic Cooperation and Development (OECD)
commercial inventories of crude oil and other liquids
 days of supply



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



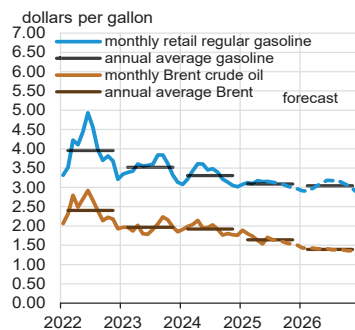
Estimated unplanned liquid fuels production outages among OPEC and non-OPEC producers



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

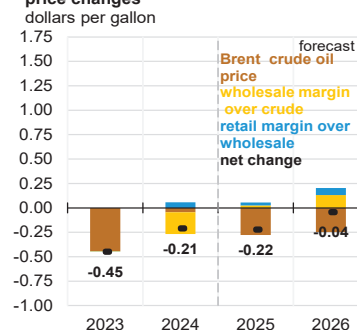


U.S. gasoline and crude oil prices

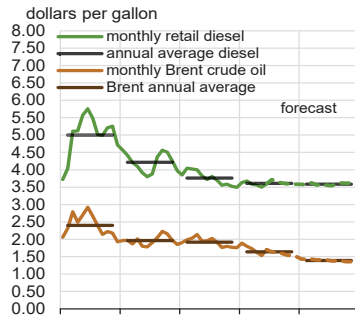


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025, and Refinitiv an LSEG Business

Components of annual gasoline price changes

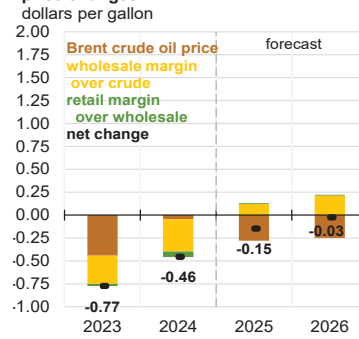


U.S. diesel and crude oil prices



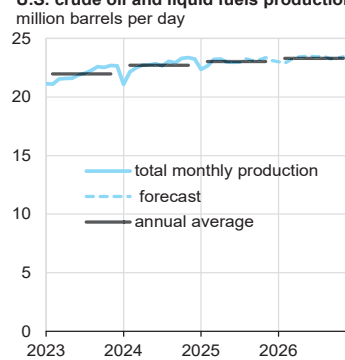
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025, and Refinitiv an LSEG Business

Components of annual diesel price changes



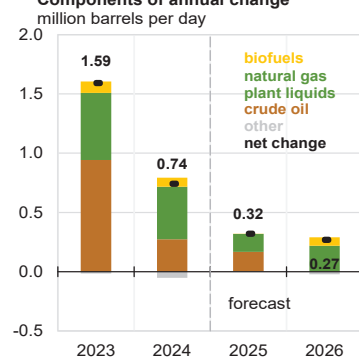
eia

U.S. crude oil and liquid fuels production



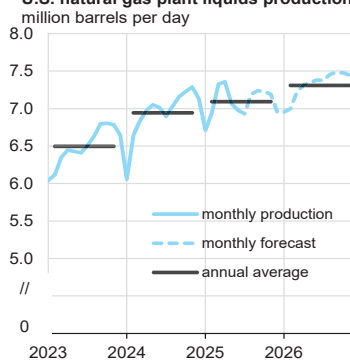
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Components of annual change



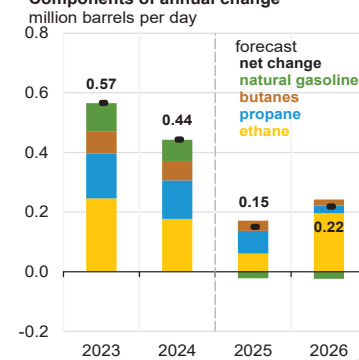
eia

U.S. natural gas plant liquids production



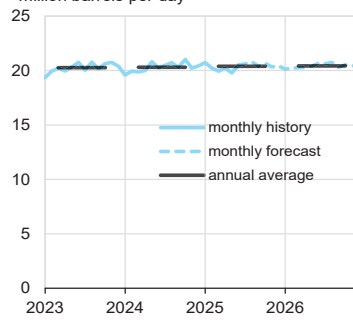
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Components of annual change



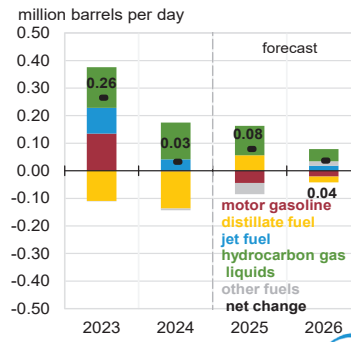
eia

U.S. liquid fuels product supplied (consumption)



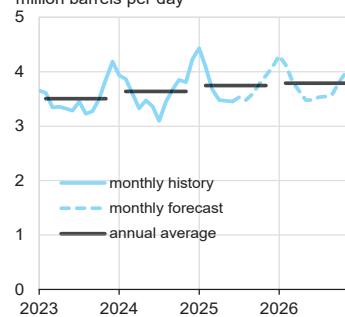
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Components of annual change



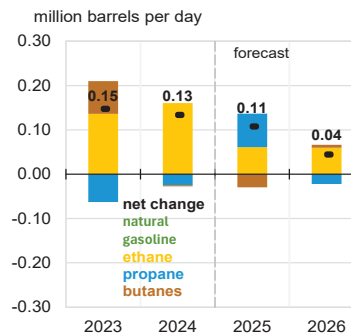
eia

U.S. hydrocarbon gas liquids product supplied (consumption)



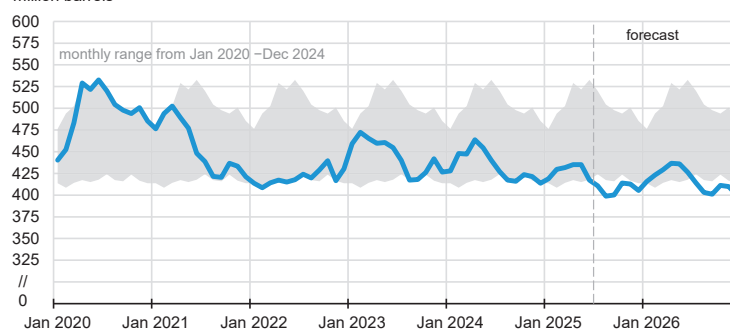
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Components of annual change



eia

U.S. commercial crude oil inventories

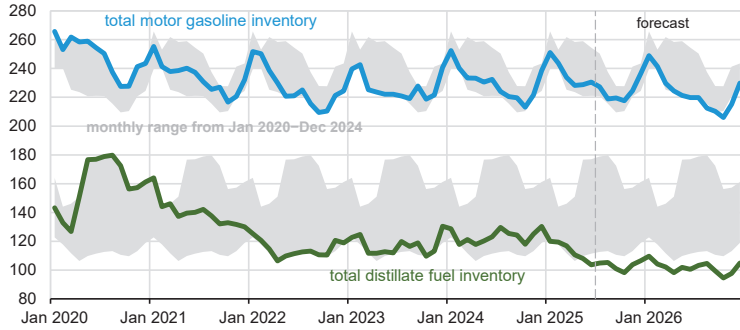


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

eia

U.S. gasoline and distillate inventories

million barrels

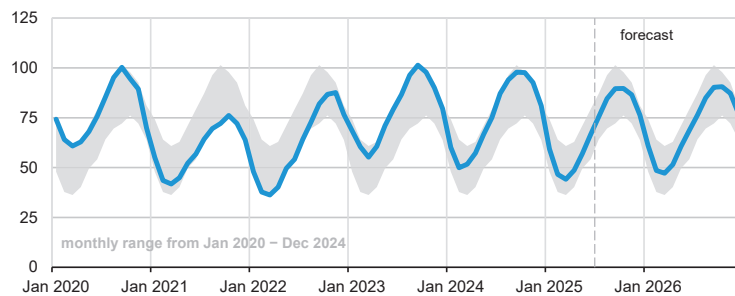


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



U.S. commercial propane inventories

million barrels



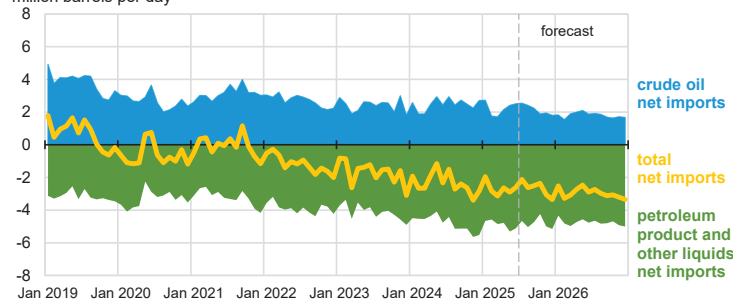
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Note: Excludes propylene.



U.S. net imports of crude oil and liquid fuels

million barrels per day



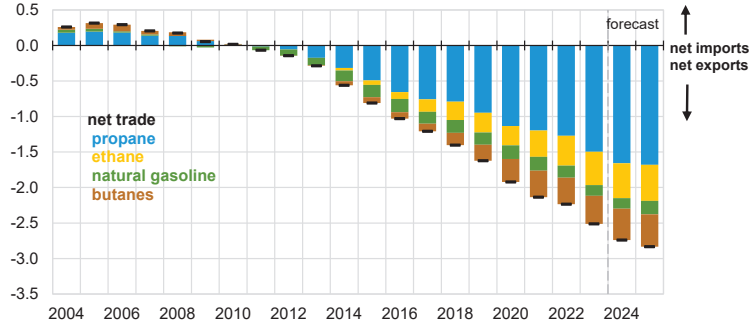
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

Note: Petroleum product and other liquids include: gasoline, distillate fuels, hydrocarbon gas liquids, jet fuel, residual fuel oil, unfinished oils, other hydrocarbons/oxygenates, and other oils.



U.S. net trade of hydrocarbon gas liquids (HGL)

million barrels per day

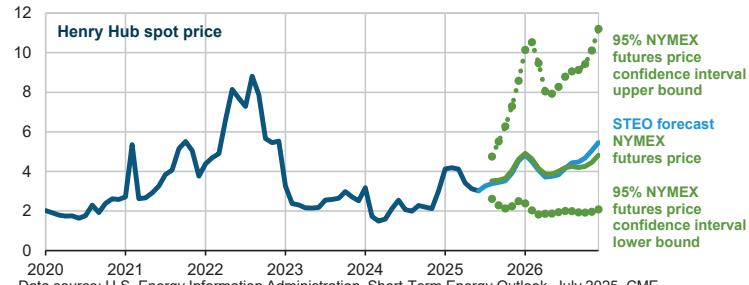


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



Henry Hub natural gas price and NYMEX confidence intervals

dollars per million British thermal units



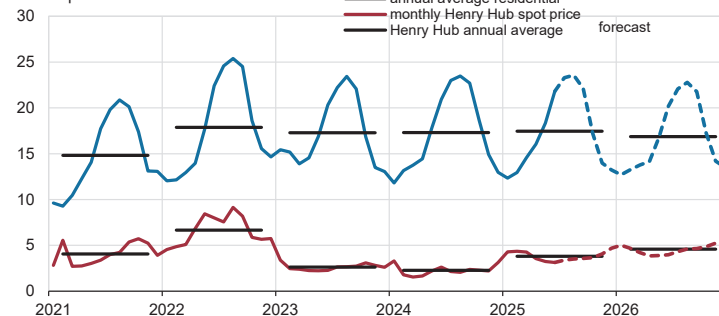
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025, CME Group, and Refinitiv an LSEG Business

Note: Confidence interval derived from options market information for the five trading days ending July 2, 2025. Intervals not calculated for months with sparse trading in near-the-money options contracts.



U.S. natural gas prices

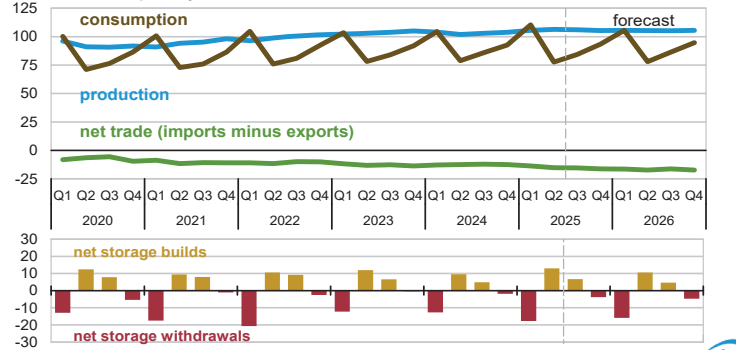
dollars per thousand cubic feet



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025, and Refinitiv an LSEG Business



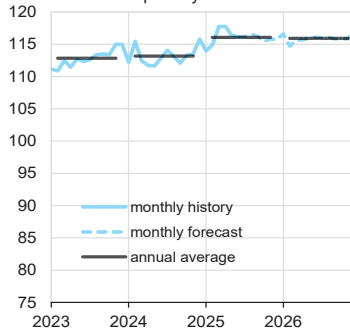
U.S. natural gas production, consumption, and net imports
billion cubic feet per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



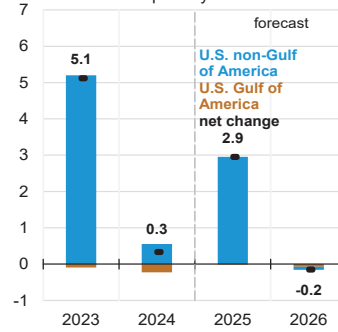
U.S. marketed natural gas production
billion cubic feet per day



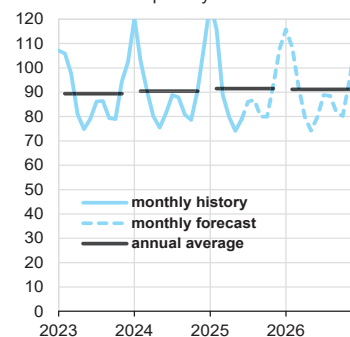
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



Components of annual change
billion cubic feet per day



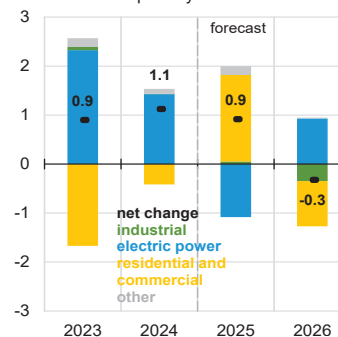
U.S. natural gas consumption
billion cubic feet per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

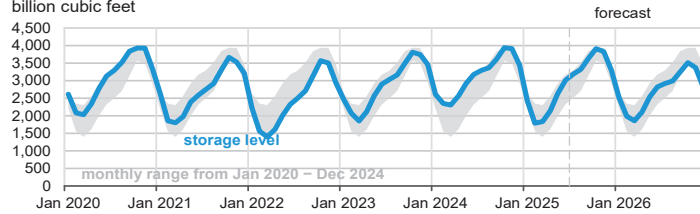


Components of annual change
billion cubic feet per day



U.S. working natural gas in storage

billion cubic feet



Percentage deviation from 2020 – 2024 average

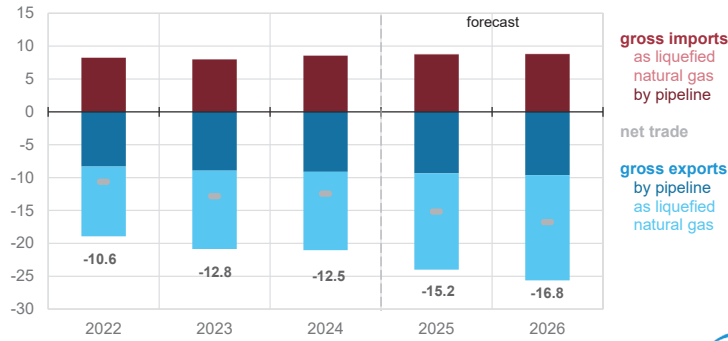


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



U.S. annual natural gas trade

billion cubic feet per day

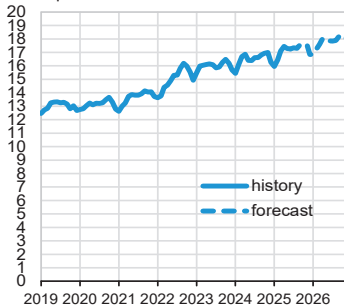


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



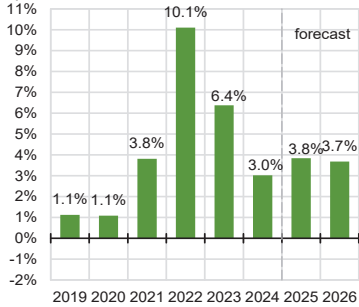
U.S. monthly nominal residential electricity price

cents per kilowatthour



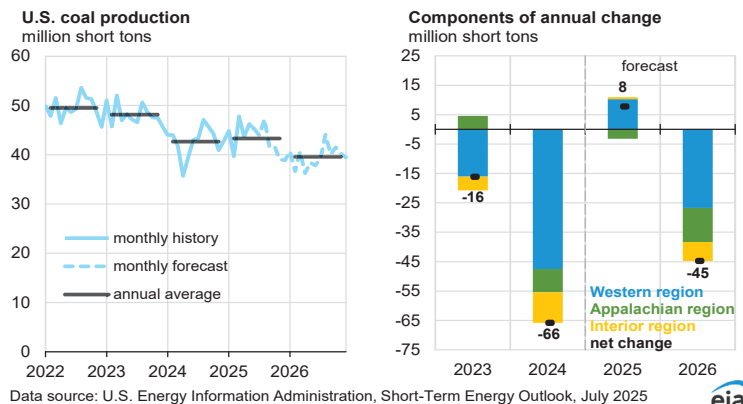
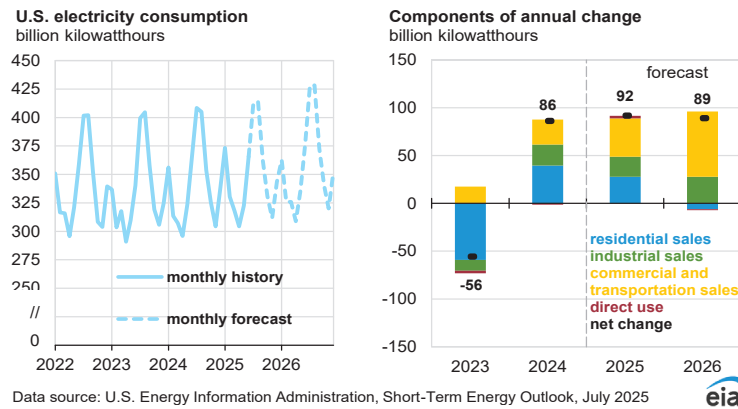
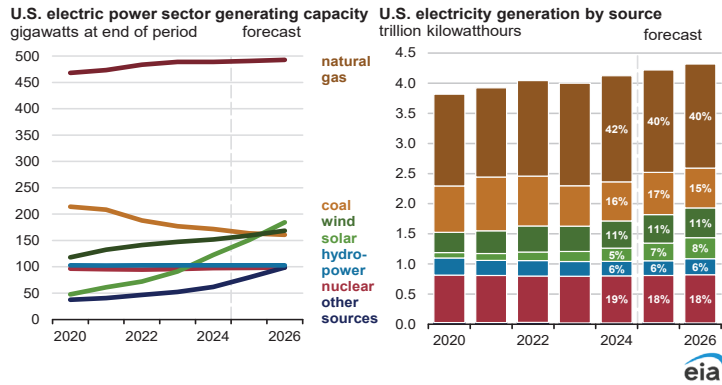
Annual growth in nominal residential electricity prices

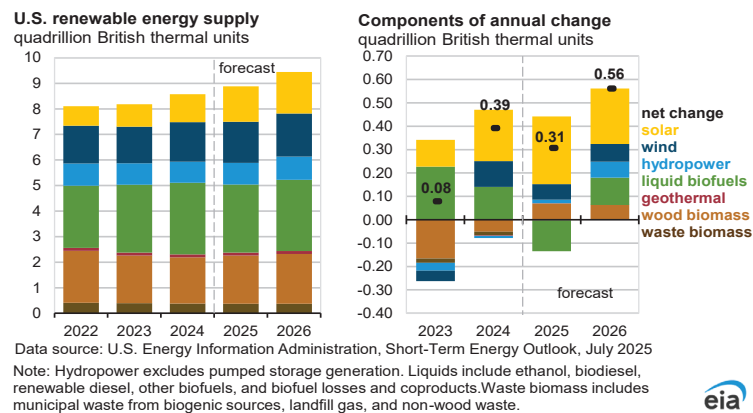
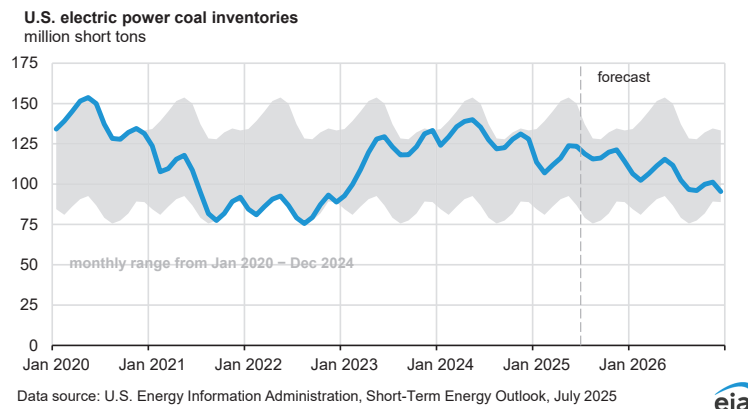
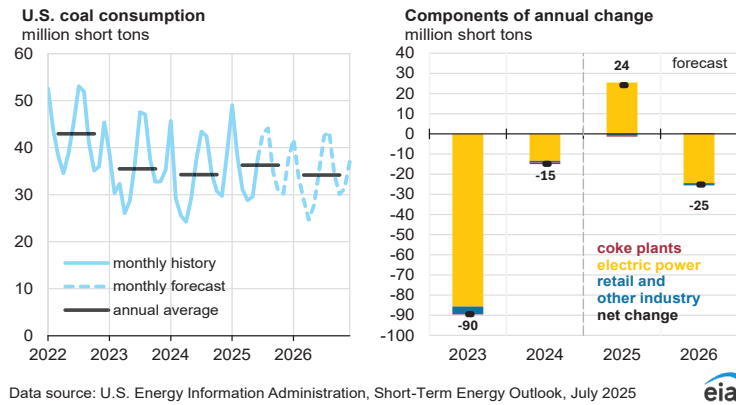
percent



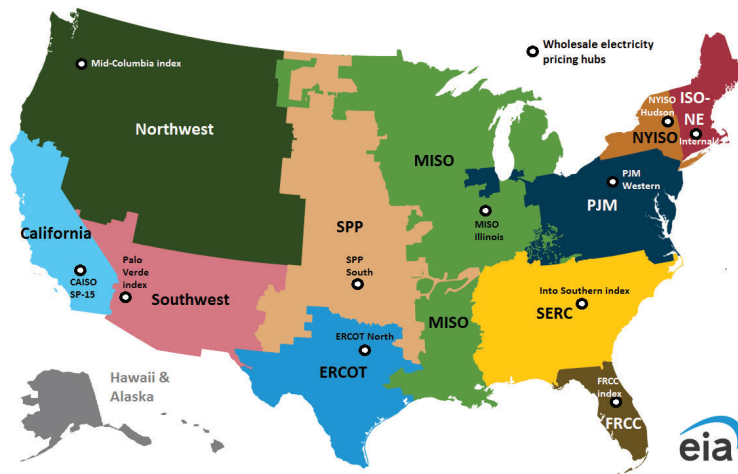
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



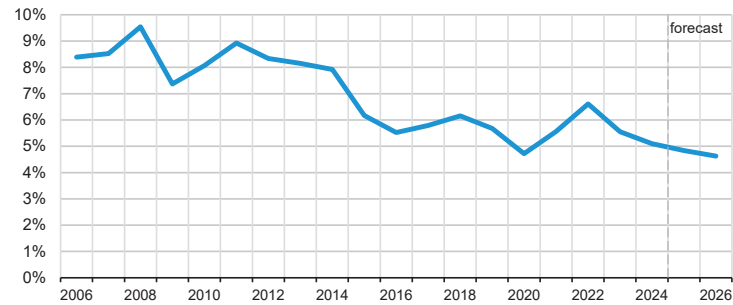




Short-Term Energy Outlook electricity supply regions

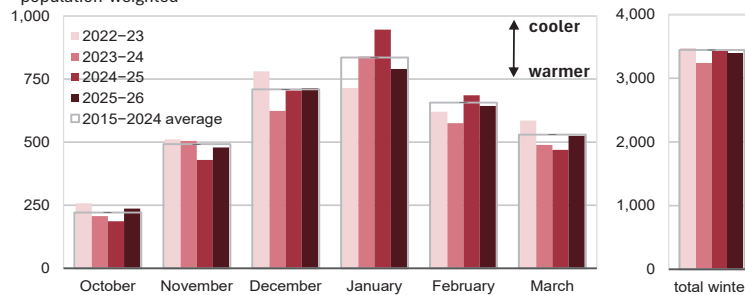


U.S. annual energy expenditures
share of gross domestic product



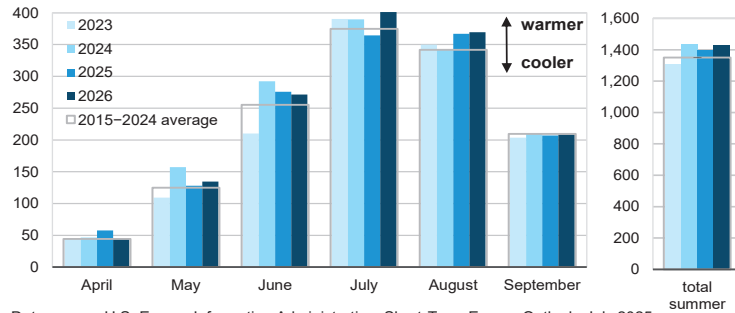
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025

U.S. winter heating degree days
population-weighted



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025
Note: EIA calculations based on National Oceanic and Atmospheric Administration (NOAA) data. Projections reflect NOAA's 14-16 month outlook.

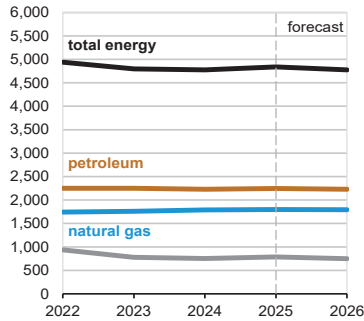
U.S. summer cooling degree days population-weighted



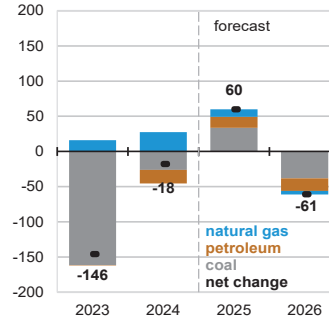
Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025
 Note: EIA calculations based on National Oceanic and Atmospheric Administration (NOAA) data.
 Projections reflect NOAA's 14-16 month outlook.



U.S. annual CO₂ emissions by source million metric tons



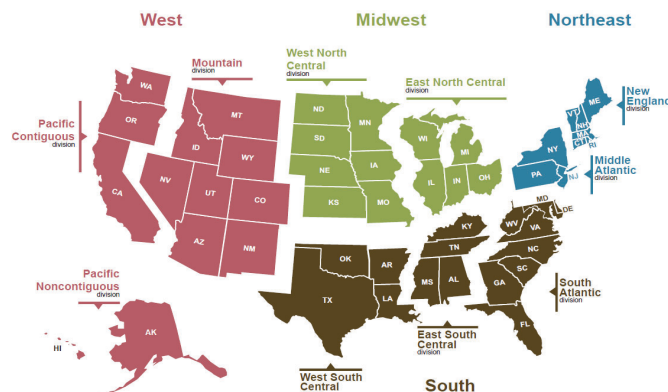
Components of annual change million metric tons



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



U.S. Census regions and divisions

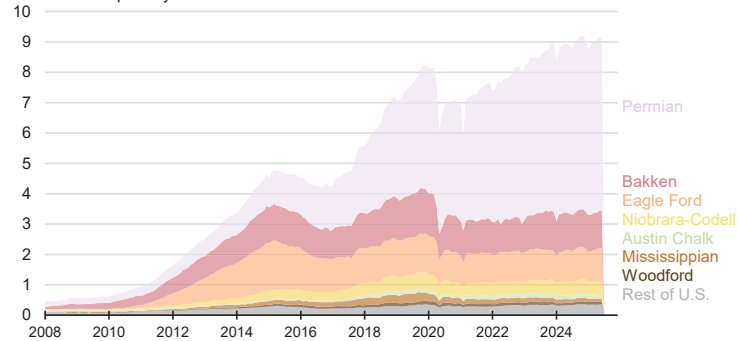


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook



Monthly U.S. tight oil production by formation

million barrels per day

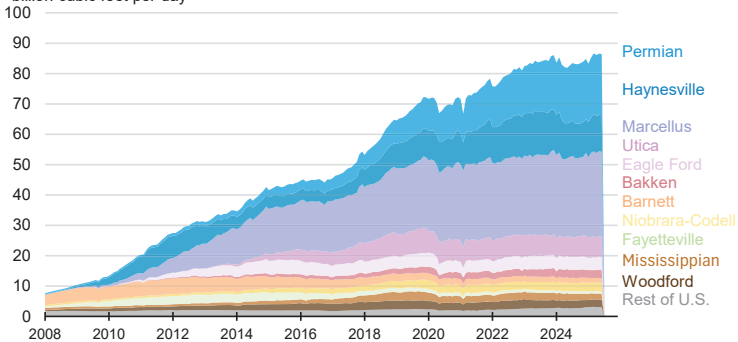


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



Monthly U.S. dry shale natural gas production by formation

billion cubic feet per day

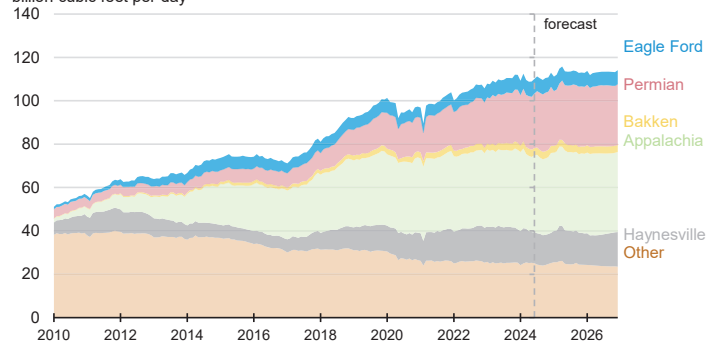


Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



Monthly Lower 48 natural gas production by region

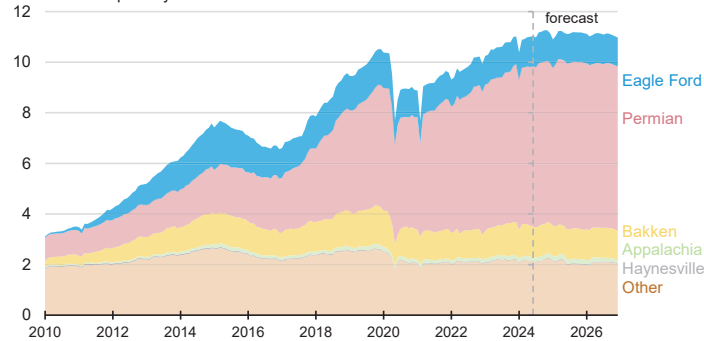
billion cubic feet per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



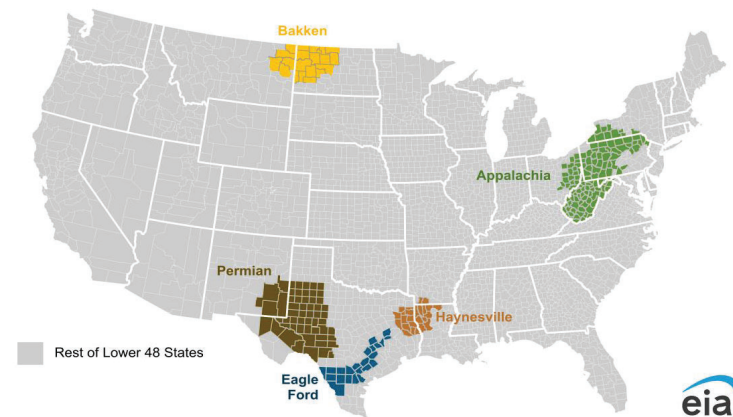
Monthly Lower 48 crude oil production by region
million barrels per day



Data source: U.S. Energy Information Administration, Short-Term Energy Outlook, July 2025



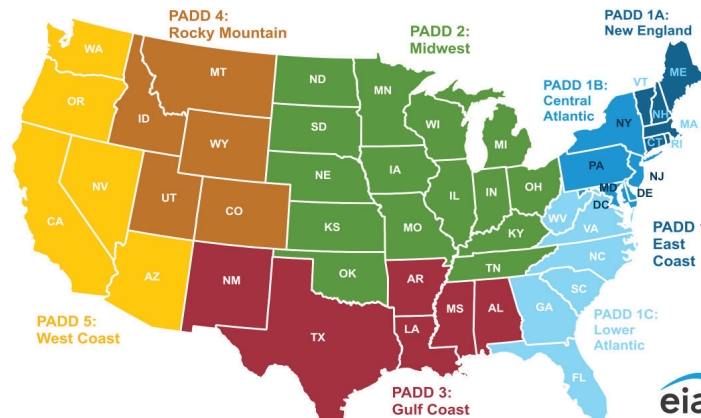
U.S. production regions



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*, and the U.S. Census Bureau



U.S. Petroleum Administration for Defense Districts (PADD) regions



Data source: U.S. Energy Information Administration, *Short-Term Energy Outlook*



Table 1. U.S. Energy Markets Summary

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Energy Production															
Crude Oil Production (a) (million barrels per day)	12.94	13.23	13.25	13.41	13.28	13.41	13.36	13.43	13.42	13.48	13.33	13.26	13.21	13.37	13.37
Dry Natural Gas Production (billion cubic feet per day)	103.9	102.0	103.0	103.8	105.6	106.4	106.1	105.4	105.5	105.4	105.3	105.5	103.2	105.9	105.4
Coal Production (million short tons)	130	118	136	128	132	135	133	120	118	113	123	121	512	520	475
Energy Consumption															
Liquid Fuels (million barrels per day)	19.80	20.36	20.50	20.56	20.31	20.16	20.60	20.48	20.20	20.46	20.55	20.48	20.31	20.39	20.42
Natural Gas (billion cubic feet per day)	104.6	78.9	85.9	92.6	110.4	77.6	84.4	93.5	105.5	78.0	86.4	94.7	90.5	91.4	91.1
Coal (b) (million short tons)	100	91	120	99	119	96	122	99	104	87	120	98	411	435	410
Electricity (billion kilowatt hours per day)	10.73	10.82	12.69	10.53	11.35	10.91	12.92	10.72	11.27	11.22	13.36	11.01	11.20	11.48	11.72
Renewables (c) (quadrillion Btu)	2.09	2.23	2.14	2.13	2.13	2.31	2.23	2.21	2.28	2.51	2.36	2.30	8.58	8.88	9.44
Total Energy Consumption (d) (quadrillion Btu)	24.44	22.24	23.75	23.79	25.42	22.17	23.80	23.94	24.76	22.35	24.03	24.11	94.22	95.32	95.25
Energy Prices															
Crude Oil West Texas Intermediate Spo (dollars per barrel)	77.50	81.77	76.43	70.74	71.85	64.63	64.69	60.02	56.00	55.67	54.68	53.00	76.60	65.22	54.82
Natural Gas Henry Hub Spot (dollars per million Btu)	2.13	2.09	2.11	2.44	4.15	3.19	3.37	3.99	4.46	3.76	4.35	5.06	2.19	3.67	4.41
Coal (dollars per million Btu)	2.50	2.55	2.45	2.44	2.43	2.47	2.45	2.44	2.46	2.47	2.47	2.45	2.48	2.45	2.46
Macroeconomic															
Real Gross Domestic Product (billion chained 2017 dollars - SAAR) ...	23,054	23,224	23,400	23,542	23,528	23,595	23,654	23,765	23,890	24,031	24,157	24,270	23,305	23,636	24,087
Percent change from prior year	2.9	3.0	2.7	2.5	2.1	1.6	1.1	0.9	1.5	1.8	2.1	2.1	2.8	1.4	1.9
GDP Implicit Price Deflator (Index, 2017=100)	124.2	124.9	125.5	126.3	127.4	128.8	130.3	131.4	132.2	132.7	133.3	134.0	125.2	129.5	133.0
Percent change from prior year	2.4	2.6	2.2	2.5	2.6	3.1	3.8	4.0	3.7	3.0	2.3	2.0	2.4	3.4	2.7
Real Disposable Personal Income (billion chained 2017 dollars - SAAR) ...	17,452	17,497	17,506	17,614	17,741	17,924	17,837	17,882	18,239	18,389	18,513	18,652	17,517	17,846	18,448
Percent change from prior year	3.4	2.8	2.5	2.3	1.7	2.4	1.9	1.5	2.8	2.6	3.8	4.3	2.7	1.9	3.4
Manufacturing Production Index (Index, 2017=100)	99.5	99.8	99.6	99.3	100.4	100.7	100.3	100.1	100.0	100.1	100.6	100.9	99.5	100.4	100.4
Percent change from prior year	-0.6	-0.3	-0.4	-0.4	1.0	0.9	0.7	0.9	-0.5	-0.6	0.3	0.8	-0.4	0.9	0.0
Weather															
U.S. Heating Degree-Days	1,904	413	50	1,321	2,102	438	72	1,430	1,960	464	73	1,424	3,689	4,042	3,920
U.S. Cooling Degree-Days	54	496	942	141	53	461	938	106	51	451	979	107	1,633	1,559	1,589

(a) Includes lease condensate.

(b) Total consumption includes Independent Power Producer (IPP) consumption.

(c) Renewable energy includes minor components of non-marketed renewable energy that is neither bought nor sold, either directly or indirectly, as inputs to marketed energy.

EIA does not estimate or project end-use consumption of non-marketed renewable energy.

 (d) The conversion from physical units to Btu is calculated using a subset of conversion factors used in the calculations of gross energy consumption in EIA's *Monthly Energy Review* (MER). Consequently, the historical data may not precisely match those published in the MER.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Prices are not adjusted for inflation.

Sources:

 Historical data: Latest data available from Energy Information Administration databases supporting the following reports: *Petroleum Supply Monthly*;

Petroleum Supply Annual; *Weekly Petroleum Status Report*; *Petroleum Marketing Monthly*; *Natural Gas Monthly*;

Electric Power Monthly; *Quarterly Coal Report*; and *International Petroleum Monthly*.

Minor discrepancies with published historical data are due to independent rounding.

Forecasts: EIA Short-Term Integrated Forecasting System. U.S. macroeconomic forecasts are based on the S&P Global model of the U.S. Economy.

Table 2. Energy Prices
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Crude Oil (dollars per barrel)															
West Texas Intermediate Spot Average	77.50	81.77	76.43	70.74	71.85	64.63	64.69	60.02	56.00	55.67	54.68	53.00	76.60	65.22	54.82
Brent Spot Average	82.96	84.72	80.03	74.65	75.83	68.01	68.02	64.02	60.00	59.00	58.00	57.00	80.56	68.89	58.48
U.S. Imported Average	72.31	79.58	74.83	69.38	70.83	62.53	62.00	57.26	53.25	52.92	51.95	50.25	74.17	63.19	52.13
U.S. Refiner Average Acquisition Cost	76.42	81.76	76.98	71.39	72.63	64.73	63.96	59.23	55.25	54.93	53.93	52.25	76.63	65.07	54.09
U.S. Liquid Fuels (dollars per gallon)															
Wholesale Petroleum Product Prices															
Gasoline	2.46	2.58	2.34	2.11	2.20	2.17	2.12	2.00	1.94	2.08	2.10	1.90	2.37	2.12	2.00
Diesel Fuel	2.70	2.51	2.31	2.23	2.39	2.18	2.27	2.26	2.25	2.20	2.27	2.25	2.44	2.28	2.24
Fuel Oil	2.64	2.42	2.09	2.07	2.31	2.08	2.17	2.21	2.22	2.14	2.19	2.20	2.30	2.19	2.18
Jet Fuel	2.68	2.52	2.27	2.15	2.29	2.07	2.15	2.16	2.18	2.13	2.17	2.17	2.40	2.16	2.16
No. 6 Residual Fuel Oil (a)	1.98	2.06	2.00	1.84	1.87	1.67	1.69	1.58	1.50	1.44	1.44	1.40	1.97	1.71	1.45
Propane Mont Belvieu Spot	0.84	0.75	0.74	0.78	0.90	0.78	0.74	0.71	0.70	0.70	0.70	0.69	0.78	0.78	0.70
Retail Prices Including Taxes															
Gasoline Regular Grade (b)	3.24	3.56	3.37	3.07	3.10	3.16	3.11	2.99	2.93	3.12	3.16	2.96	3.31	3.09	3.04
Gasoline All Grades (b)	3.36	3.68	3.48	3.19	3.22	3.28	3.24	3.12	3.06	3.25	3.29	3.10	3.43	3.22	3.18
On-highway Diesel Fuel	3.97	3.85	3.69	3.54	3.63	3.56	3.67	3.59	3.59	3.56	3.58	3.61	3.76	3.61	3.59
Heating Oil	3.79	3.66	3.54	3.43	3.75	3.50	3.50	3.53	3.46	3.40	3.40	3.45	3.61	3.57	3.43
Propane Residential	2.58	2.48	2.38	2.48	2.71	0.00	0.00	2.02	2.21	0.00	0.00	1.85	2.48	0.00	0.00
Natural Gas															
Henry Hub Spot (dollars per thousand cubic feet)	2.21	2.17	2.19	2.54	4.30	3.31	3.50	4.14	4.63	3.91	4.52	5.26	2.28	3.81	4.58
Henry Hub Spot (dollars per million Btu)	2.13	2.09	2.11	2.44	4.15	3.19	3.37	3.99	4.46	3.76	4.35	5.06	2.19	3.67	4.41
U.S. Retail Prices (dollars per thousand cubic feet)															
Industrial Sector	4.54	3.40	3.33	4.31	5.69	4.37	4.08	4.91	5.68	4.59	5.00	5.96	3.93	4.79	5.34
Commercial Sector	9.84	10.34	10.99	10.13	10.25	11.46	11.35	9.81	9.98	10.56	11.30	10.44	10.14	10.42	10.36
Residential Sector	12.71	16.69	23.05	14.37	13.04	17.83	22.97	14.10	13.17	16.10	22.19	14.33	14.55	14.69	14.61
U.S. Electricity															
Power Generation Fuel Costs (dollars per million Btu)															
Coal	2.50	2.55	2.45	2.44	2.43	2.47	2.45	2.44	2.46	2.47	2.47	2.45	2.48	2.45	2.46
Natural Gas	3.37	2.37	2.37	3.03	4.98	3.26	3.39	4.24	4.98	3.90	4.33	5.29	2.75	3.91	4.60
Residual Fuel Oil (c)	18.84	18.55	17.84	16.16	16.29	14.48	13.23	12.72	12.59	12.78	12.02	11.78	17.79	14.36	12.28
Distillate Fuel Oil	20.14	19.56	18.46	17.67	18.56	17.31	17.54	17.54	17.49	17.14	17.47	17.48	19.01	17.92	17.41
Prices to Ultimate Customers (cents per kilowatthour)															
Industrial Sector	7.87	8.04	8.64	8.01	8.27	8.38	8.79	8.23	8.39	8.44	8.92	8.30	8.15	8.43	8.52
Commercial Sector	12.58	12.65	13.39	12.69	13.08	13.27	13.88	13.11	13.35	13.51	14.07	13.20	12.85	13.36	13.56
Residential Sector	16.01	16.53	16.67	16.70	16.44	17.32	17.40	17.32	17.20	17.92	17.96	17.88	16.48	17.12	17.75

- (a) Average for all sulfur contents.
(b) Average self-service cash price.
(c) Includes fuel oils No. 4, No. 5, No. 6, and topped crude.

Notes:
EIA completed modeling and analysis for this report on July 2, 2025.
- = no data available
The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.
Prices are not adjusted for inflation; prices exclude taxes unless otherwise noted.

Sources:
Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Petroleum Marketing Monthly; *Weekly Petroleum Status Report*; *Natural Gas Monthly*; *Electric Power Monthly*; *Monthly Energy Review*; *Heating Oil and Propane Update*.
WTI and Brent crude oil spot prices, the Mt. Belvieu propane spot price, and the Henry Hub natural gas spot price are from Refinitiv,an LSEG company, via EIA (https://www.eia.gov/dnav/pet/pet_pri_spt_s1_d.htm).
Retail heating oil prices are from the Bureau of Labor Statistics, *Consumer Price Index*.
Minor discrepancies with published historical data are due to independent rounding.
Forecasts: EIA Short-Term Integrated Forecasting System.

Table 3a. World Petroleum and Other Liquid Fuels Production, Consumption, and Inventories
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Production (million barrels per day) (a)															
World total	102.18	102.80	102.82	103.39	103.37	104.46	105.08	105.50	105.15	105.63	105.94	106.16	102.80	104.61	105.72
Crude oil	76.66	76.18	75.84	76.29	77.02	77.45	77.78	78.35	78.36	78.04	78.01	78.34	76.24	77.66	78.19
Other liquids	25.52	26.62	26.98	27.09	26.35	27.00	27.30	27.15	26.79	27.59	27.93	27.82	26.56	26.95	27.54
World total	102.18	102.80	102.82	103.39	103.37	104.46	105.08	105.50	105.15	105.63	105.94	106.16	102.80	104.61	105.72
OPEC total (b)	32.39	32.47	32.47	32.44	32.67	32.96	32.82	32.89	32.98	33.02	33.15	33.14	32.44	32.84	33.08
Crude oil	26.77	26.83	26.68	26.70	26.97	27.26	27.12	27.15	27.19	27.21	27.29	27.25	26.74	27.13	27.24
Other liquids	5.62	5.63	5.78	5.74	5.70	5.70	5.70	5.74	5.79	5.81	5.86	5.89	5.70	5.71	5.84
Non-OPEC total	69.80	70.33	70.35	70.95	70.69	71.50	72.26	72.61	72.16	72.61	72.79	73.02	70.36	71.77	72.65
Crude oil	49.89	49.34	49.16	49.60	50.05	50.19	50.66	51.21	51.17	50.83	50.71	51.10	49.50	50.53	50.95
Other liquids	19.90	20.99	21.19	21.35	20.65	21.31	21.60	21.41	21.00	21.78	22.07	21.93	20.86	21.24	21.70
Consumption (million barrels per day) (c)															
World total	101.66	102.74	103.29	103.26	102.16	103.19	104.34	104.44	103.35	104.56	105.26	105.16	102.74	103.54	104.59
OECD total (d)	44.79	45.59	46.24	46.06	45.25	45.07	46.12	45.90	45.37	45.31	46.00	45.78	45.67	45.59	45.62
Canada	2.37	2.30	2.45	2.38	2.36	2.32	2.45	2.39	2.34	2.31	2.44	2.38	2.38	2.38	2.37
Europe	12.85	13.63	14.04	13.51	13.00	13.52	13.92	13.53	13.14	13.53	13.93	13.49	13.51	13.50	13.52
Japan	3.44	2.95	2.91	3.27	3.38	2.82	2.87	3.18	3.36	2.76	2.81	3.11	3.14	3.06	3.01
United States	19.80	20.36	20.50	20.56	20.31	20.16	20.60	20.48	20.20	20.46	20.55	20.48	20.31	20.39	20.42
U.S. Territories	0.11	0.12	0.13	0.12	0.12	0.12	0.13	0.12	0.11	0.11	0.12	0.12	0.12	0.12	0.12
Other OECD	6.22	6.22	6.20	6.21	6.09	6.13	6.14	6.20	6.21	6.14	6.15	6.21	6.21	6.14	6.18
Non-OECD total	56.87	57.16	57.05	57.19	56.90	58.12	58.22	58.53	57.99	59.25	59.26	59.37	57.07	57.95	58.97
China	16.27	16.47	16.14	16.36	16.34	16.59	16.35	16.71	16.66	16.82	16.57	16.87	16.31	16.50	16.73
Eurasia	4.84	5.00	5.35	5.25	4.83	5.00	5.33	5.21	4.87	5.03	5.37	5.25	5.11	5.09	5.13
Europe	0.76	0.78	0.78	0.78	0.74	0.77	0.79	0.79	0.74	0.77	0.79	0.79	0.77	0.77	0.77
Other Asia	14.99	14.84	14.17	14.59	14.96	15.03	14.68	15.23	15.38	15.58	15.13	15.56	14.65	14.98	15.41
Other non-OECD	20.01	20.07	20.62	20.21	20.03	20.72	21.07	20.59	20.34	21.04	21.40	20.90	20.23	20.61	20.92
Total crude oil and other liquids inventory net withdrawals (million barrels per day)															
World total	-0.53	-0.06	0.47	-0.13	-1.21	-1.27	-0.74	-1.07	-1.79	-1.07	-0.67	-1.00	-0.06	-1.07	-1.13
United States	0.13	-0.64	0.00	0.23	0.33	-0.31	-0.12	0.14	0.08	-0.33	0.08	0.32	-0.07	0.01	0.04
Other OECD	-0.12	-0.31	0.30	0.22	-0.42	-0.29	-0.19	-0.37	-0.56	-0.22	-0.23	-0.40	0.02	-0.32	-0.35
Other inventory draws and balance	-0.53	0.89	0.17	-0.59	-1.12	-0.67	-0.43	-0.84	-1.30	-0.52	-0.52	-0.93	-0.02	-0.76	-0.82
End-of-period commercial crude oil and other liquids inventories (million barrels)															
OECD total	2,757	2,834	2,796	2,744	2,749	2,796	2,815	2,826	2,863	2,913	2,927	2,934	2,744	2,826	2,934
United States	1,230	1,280	1,270	1,237	1,205	1,226	1,227	1,204	1,191	1,221	1,214	1,185	1,237	1,204	1,185
Other OECD	1,526	1,554	1,527	1,506	1,544	1,571	1,588	1,622	1,672	1,692	1,713	1,750	1,506	1,622	1,750

(a) Includes crude oil, lease condensate, natural gas plant liquids, other liquids, refinery processing gain, and other unaccounted-for liquids. Differences in the reported historical production data across countries could result in some inconsistencies in the delineation between crude oil and other liquid fuels.

(b) OPEC = Organization of the Petroleum Exporting Countries: Algeria, Congo (Brazzaville), Equatorial Guinea, Gabon, Iran, Iraq, Kuwait, Libya, Nigeria, Saudi Arabia, United Arab Emirates, and Venezuela.

(c) Consumption of petroleum by the OECD countries is the same as "petroleum product supplied," defined in the glossary of the EIA Petroleum Supply Monthly (DOE/EIA-0109). Consumption of petroleum by the non-OECD countries is "apparent consumption," which includes internal consumption, refinery fuel and loss, and bunkering.

(d) OECD = Organization for Economic Cooperation and Development: Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, Türkiye, United Kingdom, and United States.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Energy Information Administration *International Energy Statistics* (<https://www.eia.gov/international/data/world>).

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 3b. Non-OPEC Petroleum and Other Liquid Fuels Production (million barrels per day)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Petroleum and other liquid fuels production (a)															
Non-OPEC total (b)	69.80	70.33	70.35	70.95	70.69	71.50	72.26	72.61	72.16	72.61	72.79	73.02	70.36	71.77	72.65
North America total	29.90	30.59	30.84	31.54	30.89	30.97	31.18	31.42	31.25	31.32	31.45	31.57	30.72	31.12	31.40
Canada	5.95	5.82	5.92	6.29	6.28	6.06	6.24	6.41	6.40	6.09	6.30	6.51	6.00	6.25	6.33
Mexico	2.05	2.00	2.04	1.95	1.87	1.85	1.83	1.80	1.80	1.78	1.76	1.74	2.01	1.83	1.77
United States	21.91	22.77	22.88	23.30	22.75	23.06	23.11	23.21	23.05	23.45	23.39	23.32	22.71	23.03	23.30
Central and South America total	7.01	7.50	7.74	7.33	7.13	7.74	8.10	7.89	7.79	8.34	8.53	8.29	7.39	7.72	8.24
Argentina	0.86	0.87	0.91	0.94	0.93	0.95	0.98	1.01	1.03	1.04	1.06	1.08	0.89	0.97	1.06
Brazil	3.90	4.39	4.67	4.15	3.99	4.60	4.88	4.46	4.36	4.90	5.03	4.68	4.28	4.49	4.74
Colombia	0.80	0.82	0.80	0.79	0.79	0.77	0.78	0.77	0.77	0.76	0.76	0.76	0.80	0.78	0.76
Guyana	0.64	0.62	0.57	0.64	0.63	0.63	0.67	0.85	0.86	0.85	0.91	1.00	0.62	0.69	0.91
Europe total	3.94	3.86	3.72	3.90	3.92	3.88	3.95	4.11	4.06	3.95	3.86	3.97	3.86	3.96	3.96
Norway	2.06	2.01	1.95	2.01	1.97	2.00	2.13	2.22	2.18	2.11	2.08	2.13	2.01	2.08	2.12
United Kingdom	0.77	0.74	0.68	0.77	0.80	0.78	0.71	0.77	0.76	0.74	0.67	0.73	0.74	0.77	0.72
Eurasia total	13.79	13.40	13.20	13.19	13.54	13.60	13.63	13.76	13.80	13.71	13.64	13.80	13.39	13.63	13.73
Azerbaijan	0.60	0.59	0.59	0.60	0.57	0.57	0.56	0.56	0.55	0.54	0.53	0.53	0.60	0.57	0.54
Kazakhstan	2.00	1.90	1.90	1.82	2.16	2.18	2.21	2.25	2.24	2.20	2.15	2.23	1.90	2.20	2.20
Russia	10.83	10.55	10.34	10.42	10.44	10.47	10.47	10.57	10.62	10.58	10.58	10.66	10.53	10.49	10.61
Middle East total	3.14	3.17	3.15	3.17	3.16	3.22	3.22	3.24	3.25	3.27	3.31	3.38	3.16	3.21	3.30
Oman	1.01	1.00	1.00	1.00	1.00	0.99	1.00	1.02	1.03	1.03	1.03	1.03	1.00	1.00	1.03
Qatar	1.86	1.87	1.88	1.88	1.88	1.88	1.88	1.88	1.88	1.88	1.93	1.99	1.87	1.88	1.92
Africa total	2.63	2.50	2.55	2.58	2.58	2.59	2.73	2.70	2.62	2.61	2.59	2.58	2.57	2.65	2.60
Angola	1.20	1.16	1.17	1.13	1.08	1.04	1.11	1.09	1.07	1.06	1.04	1.03	1.16	1.08	1.05
Egypt	0.66	0.65	0.63	0.62	0.61	0.61	0.62	0.62	0.57	0.57	0.57	0.57	0.64	0.61	0.57
Asia and Oceania total	9.37	9.32	9.15	9.24	9.48	9.50	9.45	9.50	9.40	9.42	9.40	9.44	9.27	9.48	9.41
China	5.39	5.36	5.29	5.30	5.51	5.44	5.38	5.42	5.36	5.39	5.38	5.42	5.33	5.44	5.39
India	0.95	0.95	0.94	0.95	0.97	0.98	0.97	0.98	1.01	1.01	1.01	1.02	0.95	0.98	1.01
Indonesia	0.86	0.88	0.86	0.87	0.88	0.88	0.88	0.87	0.87	0.87	0.86	0.86	0.87	0.88	0.87
Malaysia	0.60	0.58	0.53	0.57	0.58	0.58	0.58	0.59	0.56	0.56	0.55	0.55	0.57	0.58	0.55
Unplanned production outages															
Non-OPEC total	1.08	1.15	1.37	1.36	1.28	1.16	-	-	-	-	-	-	1.24	-	-

(a) Includes crude oil, lease condensate, natural gas plant liquids, other liquids, refinery processing gain, and other unaccounted-for liquids.

(b) OPEC = Organization of the Petroleum Exporting Countries: Algeria, Congo (Brazzaville), Equatorial Guinea, Gabon, Iran, Iraq, Kuwait, Libya, Nigeria, Saudi Arabia, United Arab Emirates, and Venezuela.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

 Historical data: Energy Information Administration *International Energy Statistics* (<https://www.eia.gov/international/data/world>).

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 3c. World Petroleum and Other Liquid Fuels Production (million barrels per day)
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Petroleum and other liquid fuels production (a)															
World total	102.18	102.80	102.82	103.39	103.37	104.46	105.08	105.50	105.15	105.63	105.94	106.16	102.80	104.61	105.72
OPEC+ total (b)	43.34	42.71	42.54	42.20	42.65	43.03	43.44	43.67	43.77	43.72	43.77	43.90	42.69	43.20	43.79
United States	21.91	22.77	22.88	23.30	22.75	23.06	23.11	23.21	23.05	23.45	23.39	23.32	22.71	23.03	23.30
Non-OPEC+ excluding United States	36.94	37.33	37.41	37.89	37.97	38.37	38.52	38.62	38.33	38.47	38.78	38.95	37.39	38.37	38.63
OPEC total (c)	32.39	32.47	32.47	32.44	32.67	32.96	32.82	32.89	32.98	33.02	33.15	33.14	32.44	32.84	33.08
Algeria	1.38	1.37	1.38	1.38	1.38	1.39	-	-	-	-	-	-	1.38	-	-
Congo (Brazzaville)	0.26	0.26	0.25	0.24	0.25	0.24	-	-	-	-	-	-	0.25	-	-
Equatorial Guinea	0.10	0.09	0.10	0.10	0.09	0.09	-	-	-	-	-	-	0.10	-	-
Gabon	0.21	0.22	0.21	0.22	0.23	0.23	-	-	-	-	-	-	0.21	-	-
Iran	4.55	4.58	4.80	4.80	4.74	4.64	-	-	-	-	-	-	4.68	-	-
Iraq	4.54	4.57	4.56	4.35	4.44	4.43	-	-	-	-	-	-	4.51	-	-
Kuwait	2.77	2.81	2.76	2.76	2.73	2.80	-	-	-	-	-	-	2.78	-	-
Libya	1.20	1.28	0.99	1.26	1.34	1.39	-	-	-	-	-	-	1.18	-	-
Nigeria	1.57	1.52	1.59	1.57	1.64	1.67	-	-	-	-	-	-	1.56	-	-
Saudi Arabia	10.79	10.68	10.71	10.66	10.68	10.84	-	-	-	-	-	-	10.71	-	-
United Arab Emirates	4.15	4.18	4.19	4.16	4.18	4.27	-	-	-	-	-	-	4.17	-	-
Venezuela	0.86	0.90	0.93	0.92	0.97	0.97	-	-	-	-	-	-	0.90	-	-
OPEC+ total (b)	43.34	42.71	42.54	42.20	42.65	43.03	43.44	43.67	43.77	43.72	43.77	43.90	42.69	43.20	43.79
OPEC members subject to OPEC+ agreements (d)	25.78	25.71	25.75	25.45	25.62	25.96	26.30	26.42	26.51	26.57	26.71	26.71	25.67	26.08	26.62
OPEC+ other participants total	17.56	17.00	16.79	16.75	17.03	17.07	17.14	17.25	17.26	17.15	17.06	17.19	17.02	17.12	17.16
Azerbaijan	0.60	0.59	0.59	0.60	0.57	0.57	0.56	0.56	0.55	0.54	0.53	0.53	0.60	0.57	0.54
Bahrain	0.18	0.20	0.17	0.19	0.20	0.19	0.19	0.18	0.17	0.18	0.18	0.18	0.19	0.19	0.18
Brunei	0.10	0.08	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.10	0.11	0.11
Kazakhstan	2.00	1.90	1.90	1.82	2.16	2.18	2.21	2.25	2.24	2.20	2.15	2.23	1.90	2.20	2.20
Malaysia	0.60	0.58	0.53	0.57	0.58	0.58	0.58	0.59	0.56	0.56	0.55	0.55	0.57	0.58	0.55
Mexico	2.05	2.00	2.04	1.95	1.87	1.85	1.83	1.80	1.80	1.78	1.76	1.74	2.01	1.83	1.77
Oman	1.01	1.00	1.00	1.00	1.00	0.99	1.00	1.02	1.03	1.03	1.03	1.03	1.00	1.00	1.03
Russia	10.83	10.55	10.34	10.42	10.44	10.47	10.47	10.57	10.62	10.58	10.58	10.66	10.53	10.49	10.61
South Sudan	0.13	0.06	0.06	0.06	0.07	0.09	0.14	0.14	0.13	0.13	0.13	0.13	0.08	0.11	0.13
Sudan	0.06	0.04	0.03	0.03	0.03	0.03	0.05	0.04	0.05	0.04	0.04	0.04	0.04	0.04	0.04

(a) Includes crude oil, lease condensate, natural gas plant liquids, other liquids, refinery processing gain, and other unaccounted-for liquids.
(b) OPEC+ total = OPEC members subject to OPEC+ agreements plus Azerbaijan, Bahrain, Brunei, Kazakhstan, Malaysia, Mexico, Oman, Russia, South Sudan, and Sudan.
(c) OPEC = Organization of the Petroleum Exporting Countries: Algeria, Congo (Brazzaville), Equatorial Guinea, Gabon, Iran, Iraq, Kuwait, Libya, Nigeria, Saudi Arabia, United Arab Emirates, and Venezuela.
(d) Iran, Libya, and Venezuela are not sbject to the OPEC+ agreements.

Notes:
EIA completed modeling and analysis for this report on July 2, 2025.
- = no data available
The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.
Minor discrepancies with published historical data are due to independent rounding.

Sources:
Historical data: Energy Information Administration *International Energy Statistics* (<https://www.eia.gov/international/data/world>).
Forecasts: EIA Short-Term Integrated Forecasting System.

Table 3d. World Crude Oil Production (million barrels per day)
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Crude oil production (a)															
World total	76.66	76.18	75.84	76.29	77.02	77.45	77.78	78.35	78.36	78.04	78.01	78.34	76.24	77.66	78.19
OPEC+ total (b)	36.30	35.77	35.61	35.06	35.48	35.94	36.42	36.51	36.57	36.57	36.62	36.61	35.68	36.09	36.59
United States	12.94	13.23	13.25	13.41	13.28	13.41	13.36	13.43	13.42	13.48	13.33	13.26	13.21	13.37	13.37
Non-OPEC+ excluding United States	27.42	27.18	26.98	27.82	28.26	28.10	28.00	28.41	28.37	27.99	28.06	28.47	27.35	28.19	28.22
OPEC total (c)															
Algeria	0.91	0.90	0.91	0.91	0.91	0.92	-	-	-	-	-	-	0.91	-	-
Congo (Brazzaville)	0.25	0.25	0.24	0.23	0.24	0.23	-	-	-	-	-	-	0.24	-	-
Equatorial Guinea	0.06	0.05	0.06	0.06	0.06	0.05	-	-	-	-	-	-	0.06	-	-
Gabon	0.21	0.22	0.21	0.22	0.23	0.23	-	-	-	-	-	-	0.22	-	-
Iran	3.24	3.26	3.34	3.39	3.40	3.32	-	-	-	-	-	-	3.31	-	-
Iraq	4.43	4.46	4.45	4.25	4.31	4.32	-	-	-	-	-	-	4.40	-	-
Kuwait	2.46	2.49	2.44	2.44	2.43	2.48	-	-	-	-	-	-	2.46	-	-
Libya	1.10	1.19	0.89	1.17	1.25	1.29	-	-	-	-	-	-	1.09	-	-
Nigeria	1.28	1.24	1.31	1.30	1.37	1.41	-	-	-	-	-	-	1.28	-	-
Saudi Arabia	9.12	9.00	9.02	8.95	8.94	9.08	-	-	-	-	-	-	9.02	-	-
United Arab Emirates	2.91	2.94	2.95	2.92	2.94	3.03	-	-	-	-	-	-	2.93	-	-
Venezuela	0.79	0.83	0.86	0.85	0.90	0.90	-	-	-	-	-	-	0.83	-	-
OPEC+ total (b)	36.30	35.77	35.61	35.06	35.48	35.94	36.42	36.51	36.57	36.57	36.62	36.61	35.68	36.09	36.59
OPEC members subject to OPEC+ agreements (d)	21.63	21.56	21.59	21.29	21.42	21.76	22.10	22.18	22.24	22.27	22.37	22.34	21.52	21.87	22.31
OPEC+ other participants total	14.66	14.22	14.02	13.78	14.06	14.19	14.31	14.33	14.33	14.30	14.24	14.27	14.17	14.22	14.28
Azerbaijan	0.47	0.47	0.48	0.48	0.47	0.45	-	-	-	-	-	-	0.48	-	-
Bahrain	0.17	0.18	0.16	0.18	0.19	0.18	-	-	-	-	-	-	0.17	-	-
Brunei	0.08	0.06	0.09	0.08	0.09	0.09	-	-	-	-	-	-	0.08	-	-
Kazakhstan	1.58	1.52	1.53	1.39	1.73	1.78	-	-	-	-	-	-	1.50	-	-
Malaysia	0.37	0.36	0.31	0.34	0.35	0.34	-	-	-	-	-	-	0.34	-	-
Mexico	1.60	1.56	1.57	1.49	1.42	1.42	-	-	-	-	-	-	1.55	-	-
Oman	0.76	0.76	0.76	0.76	0.75	0.76	-	-	-	-	-	-	0.76	-	-
Russia	9.44	9.19	9.03	8.97	8.97	9.05	-	-	-	-	-	-	9.16	-	-
South Sudan	0.13	0.06	0.06	0.06	0.07	0.09	-	-	-	-	-	-	0.08	-	-
Sudan	0.06	0.03	0.03	0.03	0.03	0.03	-	-	-	-	-	-	0.04	-	-
Crude oil production capacity															
OPEC total	31.19	31.33	31.21	31.49	31.76	31.75	31.23	31.17	31.21	31.33	31.36	31.33	31.31	31.48	31.31
Middle East	26.48	26.53	26.63	26.64	26.70	26.62	26.40	26.40	26.46	26.61	26.66	26.66	26.57	26.53	26.60
Other	4.71	4.80	4.59	4.85	5.07	5.14	4.83	4.77	4.75	4.72	4.70	4.67	4.74	4.95	4.71
Surplus crude oil production capacity															
OPEC total	4.42	4.50	4.53	4.79	4.79	4.49	4.11	4.02	4.02	4.12	4.06	4.09	4.56	4.35	4.07
Middle East	4.32	4.38	4.42	4.68	4.69	4.39	4.02	3.94	3.94	4.05	3.98	4.00	4.45	4.26	3.99
Other	0.11	0.12	0.11	0.11	0.11	0.11	0.09	0.08	0.08	0.08	0.08	0.08	0.11	0.10	0.08
Unplanned production outages															
OPEC total	1.47	1.39	1.55	1.31	1.20	1.27	-	-	-	-	-	-	1.43	-	-

(a) Differences in the reported historical production data across countries could result in some inconsistencies in the delineation between crude oil and other liquid fuels.
(b) OPEC+ total = OPEC members subject to OPEC+ agreements plus Azerbaijan, Bahrain, Brunei, Kazakhstan, Malaysia, Mexico, Oman, Russia, South Sudan, and Sudan.
(c) OPEC = Organization of the Petroleum Exporting Countries: Algeria, Congo (Brazzaville), Equatorial Guinea, Gabon, Iran, Iraq, Kuwait, Libya, Nigeria, Saudi Arabia, United Arab Emirates, and Venezuela.
(d) Iran, Libya, and Venezuela are not sbject to the OPEC+ agreements.

Notes:
EIA completed modeling and analysis for this report on July 2, 2025.
- = no data available
The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.
Minor discrepancies with published historical data are due to independent rounding.

Sources:
Historical data: Energy Information Administration *International Energy Statistics* (<https://www.eia.gov/international/data/world>).
Forecasts: EIA Short-Term Integrated Forecasting System.

Table 3e. World Petroleum and Other Liquid Fuels Consumption (million barrels per day)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026						
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Petroleum and other liquid fuels consumption (a)															
World total	101.66	102.74	103.29	103.26	102.16	103.19	104.34	104.44	103.35	104.56	105.26	105.16	102.74	103.54	104.59
OECD total (b)	44.79	45.59	46.24	46.06	45.25	45.07	46.12	45.90	45.37	45.31	46.00	45.78	45.67	45.59	45.62
Non-OECD total	56.87	57.16	57.05	57.19	56.90	58.12	58.22	58.53	57.99	59.25	59.26	59.37	57.07	57.95	58.97
World total															
World total	101.66	102.74	103.29	103.26	102.16	103.19	104.34	104.44	103.35	104.56	105.26	105.16	102.74	103.54	104.59
North America total	23.90	24.45	24.74	24.64	24.35	24.25	24.81	24.57	24.25	24.54	24.74	24.56	24.43	24.49	24.52
Canada	2.37	2.30	2.45	2.38	2.36	2.32	2.45	2.39	2.34	2.31	2.44	2.38	2.38	2.38	2.37
Mexico	1.72	1.78	1.78	1.68	1.67	1.76	1.75	1.69	1.71	1.76	1.74	1.69	1.74	1.72	1.73
United States	19.80	20.36	20.50	20.56	20.31	20.16	20.60	20.48	20.20	20.46	20.55	20.48	20.31	20.39	20.42
Central and South America total															
Central and South America total	6.61	6.78	6.90	6.83	6.73	6.89	7.01	6.97	6.81	6.97	7.09	7.05	6.78	6.90	6.98
Brazil	3.17	3.23	3.32	3.30	3.25	3.32	3.41	3.40	3.31	3.37	3.46	3.46	3.26	3.34	3.40
Europe total															
Europe total	13.61	14.41	14.82	14.29	13.74	14.29	14.71	14.32	13.88	14.30	14.72	14.28	14.28	14.27	14.30
Eurasia total															
Eurasia total	4.84	5.00	5.35	5.25	4.83	5.00	5.33	5.21	4.87	5.03	5.37	5.25	5.11	5.09	5.13
Russia	3.70	3.79	4.11	3.95	3.64	3.76	4.07	3.91	3.66	3.78	4.10	3.93	3.89	3.85	3.87
Middle East total															
Middle East total	9.48	9.38	9.91	9.39	9.24	9.77	10.13	9.52	9.33	9.88	10.25	9.62	9.54	9.67	9.77
Africa total															
Africa total	4.61	4.62	4.54	4.70	4.77	4.77	4.65	4.80	4.90	4.89	4.77	4.93	4.62	4.75	4.87
Asia and Oceania total															
Asia and Oceania total	38.60	38.10	37.03	38.16	38.49	38.22	37.71	39.05	39.30	38.95	38.32	39.47	37.97	38.37	39.01
China	16.27	16.47	16.14	16.36	16.34	16.59	16.35	16.71	16.66	16.82	16.57	16.87	16.31	16.50	16.73
India	5.62	5.56	5.12	5.57	5.60	5.72	5.44	5.82	5.88	6.09	5.71	6.08	5.47	5.65	5.94
Japan	3.44	2.95	2.91	3.27	3.38	2.82	2.87	3.18	3.36	2.76	2.81	3.11	3.14	3.06	3.01
Real gross domestic product (c)															
World index, 2015 Q1 = 100	130.4	132.1	133.1	134.6	135.4	136.1	136.7	137.6	138.5	139.7	141.0	142.2	132.6	136.5	140.4
Percent change from prior year	3.3	3.5	3.5	3.8	3.8	3.0	2.7	2.3	2.2	2.7	3.1	3.3	3.5	2.9	2.9
OECD index, 2015 = 100	-	-	-	-	-	-	-	-	-	-	-	-	118.8	120.3	122.1
Percent change from prior year	-	-	-	-	-	-	-	-	-	-	-	-	1.8	1.3	1.4
Non-OECD index, 2015 = 100	-	-	-	-	-	-	-	-	-	-	-	-	141.7	147.3	153.1
Percent change from prior year	-	-	-	-	-	-	-	-	-	-	-	-	4.5	4.0	3.9
Nominal U.S. Dollar index (d)															
Index, 2015 Q1 = 100	114.8	116.6	116.6	119.6	121.3	118.2	116.8	117.7	118.1	118.2	117.9	117.7	116.9	118.5	118.0
Percent change from prior year	0.6	2.8	2.3	3.5	5.7	1.3	0.2	-1.6	-2.6	0.0	1.0	0.0	2.3	1.4	-0.4

(a) Consumption of petroleum by the OECD countries is the same as "petroleum product supplied," defined in the glossary of the EIA Petroleum Supply Monthly (DOE/EIA-0109). Consumption of petroleum by the non-OECD countries is "apparent consumption," which includes internal consumption, refinery fuel and loss, and bunkering.

(b) OECD = Organization for Economic Cooperation and Development: Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, Türkiye, United Kingdom, and United States.

(c) GDP values for the individual countries in the indexes are converted to U.S. dollars at purchasing power parity and then summed to create values for the world, OECD, and non-OECD. Historical and forecast data are from Oxford Economics, and quarterly values are reindexed to 2015 Q1 by EIA.

(d) An increase in the index indicates an appreciation of the U.S. dollar against a basket of currencies, and a decrease in the index indicates a depreciation of the U.S. dollar against a basket of currencies. Historical data source is the Board of Governors of the U.S. Federal Reserve System Nominal Broad Trade-Weighted Dollar Index accessed via Oxford Economics. Forecast data are from Oxford Economics, and quarterly values are reindexed to 2015 Q1 by EIA.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:Historical data: Energy Information Administration *International Energy Statistics* (<https://www.eia.gov/international/data/world>) and Oxford Economics.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 4a. U.S. Petroleum and Other Liquids Supply, Consumption, and Inventories

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Supply (million barrels per day)															
U.S. total crude oil production (a)	12.94	13.23	13.25	13.41	13.28	13.41	13.36	13.43	13.42	13.48	13.33	13.26	13.21	13.37	13.37
Alaska	0.43	0.42	0.40	0.43	0.44	0.43	0.42	0.44	0.44	0.43	0.42	0.47	0.42	0.43	0.44
Federal Gulf of America (b)	1.78	1.80	1.72	1.76	1.79	1.81	1.77	1.83	1.91	1.91	1.80	1.77	1.77	1.80	1.84
Lower 48 States (excl GOA) (c)	10.73	11.01	11.12	11.22	11.05	11.17	11.17	11.17	11.07	11.14	11.12	11.03	11.02	11.14	11.09
Appalachia region	0.15	0.16	0.16	0.17	0.18	0.19	0.18	0.17	0.17	0.17	0.15	0.14	0.16	0.18	0.16
Bakken region	1.22	1.23	1.22	1.22	1.20	1.15	1.19	1.19	1.19	1.17	1.19	1.17	1.22	1.18	1.18
Eagle Ford region	1.09	1.18	1.20	1.20	1.11	1.13	1.17	1.17	1.15	1.18	1.17	1.15	1.17	1.15	1.16
Haynesville region	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03
Permian region	6.12	6.29	6.40	6.38	6.41	6.55	6.58	6.59	6.51	6.50	6.49	6.49	6.30	6.53	6.50
Rest of Lower 48 States	2.12	2.12	2.11	2.21	2.13	2.12	2.02	2.01	2.01	2.09	2.09	2.05	2.14	2.07	2.06
Total Supply	19.79	20.36	20.50	20.56	20.31	20.16	20.60	20.48	20.20	20.46	20.55	20.48	20.30	20.39	20.42
Crude oil input to refineries	15.39	16.47	16.54	16.48	15.65	16.54	16.45	15.75	15.44	16.11	16.04	15.56	16.22	16.10	15.79
U.S. total crude oil production (a)	12.94	13.23	13.25	13.41	13.28	13.41	13.36	13.43	13.42	13.48	13.33	13.26	13.21	13.37	13.37
Transfers to crude oil supply	0.50	0.64	0.61	0.70	0.67	0.56	0.58	0.57	0.58	0.58	0.59	0.57	0.61	0.59	0.58
Crude oil net imports (d)	2.12	2.62	2.69	2.48	2.07	2.35	2.40	1.87	1.75	1.99	1.82	1.67	2.48	2.17	1.81
SPR net withdrawals (e)	-0.10	-0.10	-0.11	-0.12	-0.03	-0.07	-0.11	-0.11	-0.07	0.00	0.00	0.00	-0.11	-0.08	-0.02
Commercial inventory net withdrawals	-0.23	0.08	0.26	0.02	-0.20	0.16	0.19	-0.06	-0.27	0.03	0.27	0.01	0.03	0.02	0.01
Crude oil adjustment (f)	0.16	0.01	-0.17	-0.02	-0.13	0.12	0.03	0.05	0.03	0.04	0.02	0.05	-0.01	0.02	0.04
Refinery processing gain	0.91	0.97	0.98	1.02	0.94	0.96	1.03	1.01	0.94	0.97	0.97	0.98	0.97	0.98	0.96
Natural Gas Plant Liquids Production	6.51	7.01	7.03	7.22	6.99	7.13	7.12	7.12	7.06	7.35	7.44	7.39	6.94	7.09	7.31
Renewables and oxygenate production (g)	1.34	1.33	1.40	1.43	1.33	1.34	1.39	1.44	1.42	1.44	1.44	1.48	1.38	1.38	1.44
Fuel ethanol production	1.04	1.01	1.07	1.10	1.07	1.05	1.05	1.07	1.06	1.05	1.04	1.08	1.06	1.06	1.06
Petroleum products adjustment (h)	0.21	0.22	0.22	0.22	0.21	0.21	0.21	0.22	0.21	0.21	0.21	0.21	0.22	0.21	0.21
Petroleum products transfers to crude oil supply	-0.50	-0.64	-0.61	-0.70	-0.67	-0.56	-0.58	-0.57	-0.58	-0.58	-0.59	-0.57	-0.61	-0.59	-0.58
Petroleum product net imports (d)	-4.53	-4.40	-4.90	-5.43	-4.71	-5.07	-4.81	-4.79	-4.70	-4.69	-4.76	-4.88	-4.82	-4.85	-4.76
Hydrocarbon gas liquids	-2.59	-2.68	-2.76	-2.92	-2.84	-2.85	-2.80	-2.85	-2.92	-3.10	-3.11	-3.10	-2.74	-2.83	-3.06
Unfinished oils	0.09	0.21	0.12	0.13	0.14	0.08	0.20	0.10	0.14	0.14	0.16	0.07	0.14	0.13	0.13
Other hydrocarbons and oxygenates	-0.06	-0.08	-0.07	-0.10	-0.15	-0.16	-0.14	-0.13	-0.17	-0.16	-0.13	-0.14	-0.08	-0.14	-0.15
Total motor gasoline	-0.36	0.00	-0.09	-0.46	-0.31	-0.06	0.05	-0.15	-0.23	0.24	0.09	-0.10	-0.23	-0.12	0.00
Jet fuel	-0.09	-0.08	-0.11	-0.13	-0.11	-0.12	-0.19	-0.14	-0.11	-0.04	-0.04	-0.05	-0.10	-0.14	-0.06
Distillate fuel oil	-0.86	-1.20	-1.31	-1.25	-0.87	-1.28	-1.20	-0.99	-0.81	-1.11	-1.05	-0.93	-1.15	-1.09	-0.98
Residual fuel oil	-0.03	-0.04	-0.06	0.00	0.03	-0.04	-0.04	0.03	0.04	0.03	0.00	0.05	-0.03	-0.01	0.03
Other oils (i)	-0.64	-0.54	-0.61	-0.70	-0.59	-0.64	-0.69	-0.66	-0.65	-0.69	-0.68	-0.67	-0.62	-0.65	-0.67
Petroleum product inventory net withdrawals	0.46	-0.62	-0.15	0.33	0.56	-0.39	-0.20	0.30	0.42	-0.36	-0.20	0.31	0.00	0.07	0.04
Consumption (million barrels per day)															
U.S. total petroleum products consumption	19.80	20.36	20.50	20.56	20.31	20.16	20.60	20.48	20.20	20.46	20.55	20.48	20.31	20.39	20.42
Hydrocarbon gas liquids	3.80	3.39	3.40	3.96	4.06	3.47	3.53	3.92	4.08	3.53	3.55	3.99	3.64	3.74	3.79
Other hydrocarbons and oxygenates	0.30	0.33	0.34	0.33	0.22	0.23	0.27	0.30	0.28	0.32	0.33	0.32	0.32	0.26	0.31
Motor gasoline	8.57	9.12	9.18	8.89	8.64	8.99	9.13	8.83	8.58	9.11	9.03	8.78	8.94	8.90	8.88
Jet fuel	1.58	1.73	1.76	1.70	1.60	1.75	1.75	1.69	1.61	1.77	1.77	1.71	1.70	1.70	1.71
Distillate fuel oil	3.82	3.73	3.76	3.82	3.98	3.73	3.80	3.83	3.91	3.77	3.77	3.82	3.78	3.84	3.82
Residual fuel oil	0.28	0.30	0.27	0.30	0.32	0.25	0.27	0.29	0.28	0.27	0.27	0.28	0.29	0.28	0.28
Other oils (i)	1.44	1.77	1.78	1.55	1.48	1.73	1.86	1.61	1.46	1.68	1.83	1.57	1.64	1.67	1.64
Total petroleum and other liquid fuels net imports (d)	-2.41	-1.78	-2.20	-2.95	-2.64	-2.72	-2.42	-2.92	-2.95	-2.70	-2.94	-3.21	-2.34	-2.67	-2.95
End-of-period inventories (million barrels)															
Total commercial inventory	1230.3	1279.6	1269.5	1237.3	1204.7	1225.8	1227.3	1204.7	1191.3	1221.1	1214.3	1185.1	1237.3	1204.7	1185.1
Crude oil (excluding SPR)	447.2	440.2	415.9	413.7	431.7	417.3	400.1	405.2	429.3	426.3	401.1	400.1	413.7	405.2	400.1
Hydrocarbon gas liquids	169.2	235.1	277.4	226.0	173.5	236.3	280.8	234.5	184.0	235.0	278.0	228.6	226.0	234.5	228.6
Unfinished oils	91.7	87.8	80.7	76.6	87.5	85.1	83.8	79.3	88.7	87.2	84.7	79.4	76.6	79.3	79.4
Other hydrocarbons and oxygenates	38.2	33.4	33.3	34.8	37.2	32.7	32.2	34.6	37.8	34.7	33.8	36.3	34.8	34.6	36.3
Total motor gasoline	233.4	232.4	219.7	238.6	233.8	230.5	219.5	236.5	229.7	219.8	210.2	229.9	238.6	236.5	229.9
Jet fuel	42.2	45.3	45.6	43.9	41.7	44.9	45.4	41.6	41.8	41.3	41.7	39.0	43.9	41.6	39.0
Distillate fuel oil	121.2	123.1	124.3	130.3	116.8	103.6	100.9	106.6	102.2	100.5	99.4	104.9	130.3	106.6	104.9
Residual fuel oil	29.9	27.5	24.2	22.9	24.8	22.1	20.2	20.2	22.2	22.5	20.6	20.4	22.9	20.2	20.4
Other oils (i)	57.3	54.9	48.2	50.5	57.6	53.3	44.4	46.2	55.7	53.9	44.8	46.4	50.5	46.2	46.4
Crude oil in SPR (e)	363.9	373.1	382.9	393.6	396.7	403.5	413.5	423.5	430.2	430.2	430.2	430.2	393.6	423.5	430.2

(a) Includes lease condensate.

(b) Crude oil production from U.S. Federal leases in the Gulf of America (GOA).

(c) Regional production in this table is based on geographic regions and not geologic formations.

(d) Net imports equal gross imports minus gross exports.

(e) SPR: Strategic Petroleum Reserve

(f) The crude oil adjustment equals the sum of disposition items (e.g. refinery inputs) minus the sum of supply items (e.g. production).

(g) Renewables and oxygenate production includes pentanes plus, oxygenates (excluding fuel ethanol), and renewable fuels. Beginning in January 2021, renewable fuels includes biodiesel, renewable diesel, renewable jet fuel, renewable heating oil, renewable naphtha and gasoline, and other renewable fuels. For December 2020 and prior, renewable fuels includes only biodiesel.

(h) Petroleum products adjustment includes hydrogen/oxygenates/renewables/other hydrocarbons, motor gasoline blending components, and finished motor gasoline.

(i) Other oils includes aviation gasoline blending components, finished aviation gasoline, kerosene, petrochemical feedstocks, special naphthas, lubricants, waxes, petroleum coke, asphalt and road oil, still gas, and miscellaneous products.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Petroleum Supply Monthly; Petroleum Supply Annual; and Weekly Petroleum Status Report.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 4b. U.S. Hydrocarbon Gas Liquids (HGL) and Petroleum Refinery Balances (million barrels per day, except inventories and utilization factor)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
HGL production, consumption, and inventories															
Total HGL production	6.95	7.81	7.73	7.53	7.41	7.92	7.81	7.43	7.48	8.12	8.13	7.70	7.51	7.64	7.86
Natural gas processing plant production	6.51	7.01	7.03	7.22	6.99	7.13	7.12	7.12	7.06	7.35	7.44	7.39	6.94	7.09	7.31
Ethane	2.63	2.92	2.80	2.97	2.87	2.90	2.85	2.94	2.89	3.11	3.16	3.18	2.83	2.89	3.09
Propane	2.05	2.14	2.18	2.23	2.19	2.24	2.25	2.23	2.23	2.26	2.26	2.26	2.15	2.23	2.25
Butanes	1.07	1.12	1.15	1.16	1.13	1.16	1.18	1.18	1.18	1.19	1.19	1.18	1.13	1.16	1.18
Natural gasoline (pentanes plus)	0.75	0.84	0.89	0.85	0.80	0.83	0.83	0.78	0.76	0.80	0.83	0.78	0.83	0.81	0.79
Refinery and blender net production	0.46	0.82	0.73	0.34	0.44	0.80	0.72	0.33	0.44	0.80	0.72	0.33	0.59	0.57	0.57
Ethane/ethylene	0.01	-0.01	-0.01	-0.01	-0.02	-0.02	-0.02	-0.01	-0.01	-0.02	-0.02	-0.01	-0.01	-0.02	-0.01
Propane	0.27	0.28	0.28	0.27	0.27	0.30	0.28	0.27	0.27	0.29	0.28	0.28	0.27	0.28	0.28
Propylene (refinery-grade)	0.24	0.27	0.26	0.28	0.25	0.26	0.27	0.27	0.27	0.27	0.26	0.27	0.26	0.26	0.27
Butanes/butylenes	-0.05	0.28	0.21	-0.21	-0.06	0.26	0.19	-0.19	-0.08	0.26	0.19	-0.19	0.06	0.05	0.04
Renewable/oxygenate plant net production of natural gasoli	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Total HGL consumption	3.80	3.39	3.40	3.96	4.06	3.47	3.53	3.92	4.08	3.53	3.55	3.99	3.64	3.74	3.79
Ethane/Ethylene	2.24	2.26	2.27	2.48	2.37	2.35	2.41	2.38	2.38	2.45	2.45	2.47	2.32	2.38	2.44
Propane	1.02	0.53	0.52	0.91	1.21	0.56	0.58	0.95	1.17	0.51	0.56	0.94	0.75	0.82	0.79
Propylene (refinery-grade)	0.26	0.28	0.27	0.29	0.26	0.28	0.28	0.28	0.29	0.29	0.28	0.28	0.28	0.28	0.28
Butanes/butylenes	0.28	0.31	0.33	0.28	0.23	0.28	0.26	0.31	0.24	0.29	0.27	0.31	0.30	0.27	0.28
HGL net imports	-2.59	-2.68	-2.76	-2.92	-2.84	-2.85	-2.80	-2.85	-2.92	-3.10	-3.11	-3.10	-2.74	-2.83	-3.06
Ethane	-0.48	-0.46	-0.49	-0.54	-0.57	-0.46	-0.45	-0.55	-0.58	-0.61	-0.68	-0.70	-0.49	-0.51	-0.64
Propane/propylene	-1.60	-1.61	-1.67	-1.76	-1.66	-1.71	-1.68	-1.68	-1.63	-1.78	-1.73	-1.73	-1.66	-1.68	-1.72
Butanes/butylenes	-0.41	-0.47	-0.46	-0.43	-0.44	-0.48	-0.49	-0.42	-0.48	-0.54	-0.53	-0.48	-0.44	-0.46	-0.51
Natural gasoline (pentanes plus)	-0.11	-0.13	-0.14	-0.20	-0.18	-0.20	-0.18	-0.20	-0.22	-0.17	-0.17	-0.19	-0.15	-0.19	-0.19
HGL inventories (million barrels)	169.2	235.1	277.4	226.0	173.5	236.3	280.8	234.5	184.0	235.0	278.0	228.6	226.0	234.5	228.6
Ethane	58.3	75.3	77.2	71.6	63.9	70.0	68.4	67.4	59.7	62.3	63.8	63.8	71.6	67.4	63.8
Propane	51.75	75.1	97.9	81.1	44.1	66.5	89.6	76.3	47.2	68.6	90.3	76.9	81.1	76.3	76.9
Propylene (at refineries only)	0.89	1.3	1.3	1.4	1.1	1.2	1.5	1.4	1.3	1.5	1.7	1.5	1.4	1.4	1.5
Butanes/butylenes	35.1	59.2	76.4	49.1	42.8	73.9	95.3	64.7	53.7	78.6	96.9	62.4	49.1	64.7	62.4
Natural gasoline (pentanes plus)	23.2	24.2	24.6	22.9	21.6	24.7	26.0	24.7	22.1	24.0	25.4	24.1	22.9	24.7	24.1
Refining															
Total refinery and blender net inputs	17.61	19.03	19.06	18.52	17.52	18.80	18.81	17.85	17.37	18.54	18.45	17.70	18.55	18.25	18.02
Crude oil	15.39	16.47	16.54	16.48	15.65	16.54	16.45	15.75	15.44	16.11	16.04	15.56	16.22	16.10	15.79
HGL	0.69	0.56	0.60	0.77	0.60	0.48	0.54	0.74	0.65	0.49	0.54	0.73	0.65	0.59	0.60
Other hydrocarbons/oxygenates	1.12	1.20	1.20	1.18	1.11	1.19	1.18	1.16	1.12	1.18	1.17	1.16	1.18	1.16	1.16
Unfinished oils	-0.03	0.09	0.08	-0.10	-0.16	-0.03	0.09	0.00	-0.15	0.01	0.06	-0.02	0.01	-0.02	-0.02
Motor gasoline blending components	0.43	0.71	0.64	0.19	0.31	0.63	0.56	0.20	0.30	0.74	0.64	0.28	0.49	0.42	0.49
Refinery Processing Gain	0.91	0.97	0.98	1.02	0.94	0.96	1.03	1.01	0.94	0.97	0.97	0.98	0.97	0.98	0.96
Total refinery and blender net production	18.52	20.00	20.03	19.53	18.46	19.76	19.84	18.86	18.31	19.51	19.42	18.68	19.52	19.23	18.98
HGL	0.46	0.82	0.73	0.34	0.44	0.80	0.72	0.33	0.44	0.80	0.72	0.33	0.59	0.57	0.57
Finished motor gasoline	9.24	9.80	9.73	9.69	9.16	9.60	9.47	9.31	9.00	9.45	9.43	9.31	9.61	9.39	9.30
Jet fuel	1.70	1.84	1.87	1.81	1.69	1.90	1.95	1.79	1.71	1.81	1.82	1.73	1.81	1.83	1.77
Distillate fuel oil	4.57	4.95	5.08	5.14	4.70	4.87	4.97	4.89	4.68	4.85	4.80	4.81	4.94	4.86	4.79
Residual fuel oil	0.37	0.31	0.29	0.29	0.32	0.27	0.29	0.26	0.26	0.24	0.25	0.23	0.32	0.28	0.24
Other oils (a)	2.17	2.28	2.33	2.28	2.15	2.33	2.45	2.28	2.22	2.35	2.41	2.26	2.26	2.30	2.31
Refinery distillation inputs	15.80	16.96	16.95	16.80	15.94	16.80	16.92	16.21	15.90	16.56	16.53	16.02	16.63	16.47	16.25
Refinery operable distillation capacity	18.39	18.33	18.33	18.35	18.32	18.08	18.05	17.94	17.94	17.82	17.79	17.79	18.35	18.10	17.83
Refinery distillation utilization factor	0.86	0.93	0.92	0.92	0.87	0.93	0.94	0.90	0.89	0.93	0.93	0.90	0.91	0.91	0.91

(a) Other oils include aviation gasoline blending components, finished aviation gasoline, kerosene, petrochemical feedstocks, special naphthas, lubricants, waxes, petroleum coke, asphalt and road oil, still gas, and miscellaneous products.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Table 4c. U.S. Regional Motor Gasoline Prices and Inventories
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Wholesale price (dollars per gallon)															
United States average	2.46	2.58	2.34	2.11	2.20	2.17	2.12	2.00	1.94	2.08	2.10	1.90	2.37	2.12	2.00
Retail prices (dollars per gallon) (a)															
All grades United States average	3.36	3.68	3.48	3.19	3.22	3.28	3.24	3.12	3.06	3.25	3.29	3.10	3.43	3.22	3.18
Regular grade United States average	3.24	3.56	3.37	3.07	3.10	3.16	3.11	2.99	2.93	3.12	3.16	2.96	3.31	3.09	3.04
PADD 1	3.19	3.45	3.29	3.01	3.01	3.00	2.95	2.89	2.81	2.94	3.00	2.84	3.23	2.96	2.90
PADD 2	3.07	3.39	3.28	2.93	2.95	3.02	2.97	2.83	2.78	2.91	2.94	2.70	3.17	2.94	2.83
PADD 3	2.86	3.12	2.94	2.65	2.69	2.74	2.71	2.55	2.47	2.64	2.63	2.42	2.89	2.67	2.54
PADD 4	2.92	3.38	3.40	3.03	2.98	3.13	3.06	2.90	2.73	2.99	3.10	2.90	3.19	3.02	2.93
PADD 5	4.13	4.59	4.11	3.91	4.01	4.21	4.03	3.91	3.89	4.29	4.37	4.18	4.19	4.04	4.19
End-of-period inventories (million barrels) (b)															
Total U.S. gasoline inventories	233.4	232.4	219.7	238.6	233.8	230.5	219.5	236.5	229.7	219.8	210.2	229.9	238.6	236.5	229.9
PADD 1	54.9	56.8	61.2	61.2	59.5	61.1	62.1	63.1	61.1	56.2	56.7	60.1	61.2	63.1	60.1
PADD 2	54.6	48.5	45.2	52.0	56.1	47.2	45.3	51.1	52.7	46.4	43.5	50.3	52.0	51.1	50.3
PADD 3	85.4	86.4	79.2	87.3	81.8	85.2	77.4	85.7	80.4	82.6	76.8	84.2	87.3	85.7	84.2
PADD 4	8.6	8.0	6.8	8.4	8.7	6.9	7.0	7.7	8.0	7.2	6.9	7.5	8.4	7.7	7.5
PADD 5	29.9	32.7	27.2	29.7	27.6	30.0	27.7	28.8	27.5	27.3	26.4	27.8	29.7	28.8	27.8

(a) Retail prices include all federal, state, and local taxes.
(b) Inventories include both finished motor gasoline and motor gasoline blending components

Notes:
EIA completed modeling and analysis for this report on July 2, 2025.
- = no data available
The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.
Minor discrepancies with published historical data are due to independent rounding.
Prices are not adjusted for inflation.
PADD = Petroleum Administration for Defense District (PADD).
See "Petroleum for Administration Defense District" in EIA's Energy Glossary (<http://www.eia.gov/glossary/index.html>) for a list of States in each region.

Sources:
Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Petroleum Marketing Monthly; Petroleum Supply Monthly; Petroleum Supply Annual; and Weekly Petroleum Status Report.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 4d. U.S. Biofuel Supply, Consumption, and Inventories

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Supply (million barrels per day)															
Total biofuels supply	1.24	1.32	1.36	1.33	1.17	1.25	1.28	1.30	1.23	1.34	1.34	1.33	1.31	1.25	1.31
Fuel ethanol production	1.04	1.01	1.07	1.10	1.07	1.05	1.05	1.07	1.06	1.05	1.04	1.08	1.06	1.06	1.06
Biodiesel production	0.10	0.11	0.11	0.11	0.07	0.09	0.10	0.10	0.09	0.11	0.11	0.11	0.11	0.09	0.10
Renewable diesel production	0.19	0.21	0.22	0.22	0.17	0.19	0.22	0.24	0.24	0.26	0.26	0.26	0.21	0.21	0.25
Other biofuel production (a)	0.02	0.02	0.02	0.02	0.04	0.03	0.04	0.04	0.05	0.05	0.05	0.05	0.02	0.04	0.05
Fuel ethanol net imports	-0.12	-0.13	-0.11	-0.14	-0.14	-0.13	-0.12	-0.13	-0.15	-0.14	-0.11	-0.13	-0.13	-0.13	-0.13
Biodiesel net imports	0.03	0.02	0.00	0.01	0.00	0.00	0.00	0.00	0.00	-0.01	0.00	0.00	0.02	0.00	0.00
Renewable diesel net imports (b)	0.03	0.03	0.04	0.03	-0.01	-0.03	-0.02	-0.01	-0.02	-0.02	-0.02	-0.02	0.03	-0.02	-0.02
Other biofuel net imports (b)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Biofuel stock draw	-0.06	0.05	0.00	-0.02	-0.03	0.05	0.01	-0.03	-0.04	0.03	0.01	-0.03	0.00	0.00	0.00
Total distillate fuel oil supply (c)	4.10	4.04	4.09	4.13	4.18	3.95	4.05	4.11	4.16	4.06	4.06	4.11	4.09	4.07	4.10
Distillate fuel production	4.57	4.95	5.08	5.14	4.70	4.87	4.97	4.89	4.68	4.85	4.80	4.81	4.94	4.86	4.79
Biodiesel production	0.10	0.11	0.11	0.11	0.07	0.09	0.10	0.10	0.09	0.11	0.11	0.11	0.11	0.09	0.10
Renewable diesel production	0.19	0.21	0.22	0.22	0.17	0.19	0.22	0.24	0.24	0.26	0.26	0.26	0.21	0.21	0.25
Distillate fuel oil net imports	-0.86	-1.20	-1.31	-1.25	-0.87	-1.28	-1.20	-0.99	-0.81	-1.11	-1.05	-0.93	-1.15	-1.09	-0.98
Biodiesel net imports	0.03	0.02	0.00	0.01	0.00	0.00	0.00	0.00	0.00	-0.01	0.00	0.00	0.02	0.00	0.00
Renewable diesel net imports	0.03	0.03	0.04	0.03	-0.01	-0.03	-0.02	-0.01	-0.02	-0.02	-0.02	-0.02	0.03	-0.02	-0.02
Total distillate fuel stock draw	0.09	-0.02	0.00	-0.07	0.16	0.16	0.03	-0.07	0.04	0.02	0.01	-0.07	0.00	0.07	0.00
Consumption (million barrels per day)															
Total biofuels consumption	1.24	1.32	1.36	1.33	1.17	1.25	1.28	1.30	1.23	1.34	1.34	1.33	1.31	1.25	1.31
Fuel ethanol blended into motor gasoline	0.88	0.93	0.95	0.95	0.90	0.95	0.93	0.93	0.89	0.95	0.94	0.93	0.93	0.93	0.93
Biodiesel consumption	0.13	0.13	0.12	0.12	0.07	0.09	0.10	0.10	0.08	0.11	0.11	0.10	0.12	0.09	0.10
Biodiesel product supplied (d)	0.08	0.08	0.08	0.08	0.04	0.05	0.06	0.07	0.04	0.07	0.07	0.06	0.08	0.06	0.06
Biodiesel net inputs (e)	0.04	0.05	0.04	0.04	0.03	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04
Renewable diesel consumption	0.21	0.24	0.27	0.24	0.16	0.17	0.20	0.22	0.22	0.24	0.24	0.24	0.24	0.19	0.23
Renewable diesel product supplied	0.21	0.23	0.25	0.23	0.15	0.16	0.19	0.21	0.21	0.23	0.23	0.23	0.23	0.18	0.22
Renewable diesel net inputs	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Other biofuel consumption	0.02	0.02	0.02	0.02	0.03	0.04	0.04	0.04	0.05	0.05	0.05	0.05	0.02	0.04	0.05
Total motor gasoline consumption	8.57	9.12	9.18	8.89	8.64	8.99	9.13	8.83	8.58	9.11	9.03	8.78	8.94	8.90	8.88
Petroleum-based gasoline	7.69	8.19	8.23	7.94	7.74	8.04	8.19	7.90	7.70	8.16	8.10	7.85	8.02	7.97	7.95
Fuel ethanol blended into motor gasoline	0.88	0.93	0.95	0.95	0.90	0.95	0.93	0.93	0.89	0.95	0.94	0.93	0.93	0.93	0.93
Total distillate fuel oil consumption (f)	4.11	4.04	4.09	4.13	4.18	3.95	4.05	4.11	4.16	4.06	4.06	4.11	4.09	4.07	4.10
Distillate fuel oil	3.82	3.73	3.76	3.82	3.98	3.73	3.80	3.83	3.91	3.77	3.77	3.82	3.78	3.84	3.82
Petroleum-based distillate	3.77	3.66	3.70	3.77	3.94	3.69	3.74	3.79	3.87	3.71	3.71	3.77	3.73	3.79	3.76
Biodiesel net inputs (g)	0.04	0.05	0.04	0.04	0.03	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04
Renewable diesel net inputs	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Biodiesel product supplied (h)	0.08	0.08	0.08	0.08	0.04	0.05	0.06	0.07	0.04	0.07	0.07	0.06	0.08	0.06	0.06
Renewable diesel product supplied (h)	0.21	0.23	0.25	0.23	0.15	0.16	0.19	0.21	0.21	0.23	0.23	0.23	0.23	0.18	0.22
End-of-period inventories (million barrels)															
Total biofuels inventories	38.23	33.36	33.28	34.76	37.20	32.72	32.20	34.57	37.80	34.71	33.80	36.27	34.76	34.57	36.27
Fuel ethanol	27.19	22.61	23.47	24.36	27.38	24.33	23.76	24.84	26.97	24.45	23.79	24.97	24.36	24.84	24.97
Biodiesel	4.40	3.73	3.16	3.55	3.03	2.84	2.55	3.10	3.80	3.08	2.61	3.31	3.55	3.10	3.31
Renewable diesel	6.32	6.38	6.12	5.95	6.30	4.67	4.96	5.44	6.11	6.27	6.52	6.86	6.19	5.34	6.44
Other biofuels	0.30	0.40	0.53	0.48	0.85	0.85	0.85	0.85	0.85	0.85	0.85	0.85	0.43	0.85	0.85
Total distillate fuel oil inventories	131.86	133.41	133.46	140.29	125.71	111.17	108.54	115.43	112.13	109.90	108.55	115.36	140.29	115.43	115.36
Distillate fuel oil	121.16	123.12	124.30	130.34	116.83	103.64	100.94	106.55	102.16	100.50	99.39	104.90	130.34	106.55	104.90
Biodiesel	4.40	3.73	3.16	3.55	3.03	2.84	2.55	3.10	3.80	3.08	2.61	3.31	3.55	3.10	3.31
Renewable diesel	6.32	6.38	6.12	5.95	6.30	4.67	4.96	5.44	6.11	6.27	6.52	6.86	6.19	5.34	6.44

(a) Includes renewable heating oil, renewable jet fuel (sustainable aviation fuel, alternative jet fuel, and biojet), renewable naphtha, renewable gasoline, and other emerging biofuels that are in various stages of development and commercialization

(b) Renewable diesel net imports and other biofuel net imports equal imports because we do not collect or receive export data for those fuels.

(c) Total distillate fuel oil supply equals the sum of the seven components shown minus refiner and blender net inputs of biodiesel and renewable diesel, which are listed in rows 44 and 45 of this table.

(d) The volumes of renewable fuels that are not reported as blended with petroleum fuels.

(e) The volumes of renewable fuels that are reported as blended with petroleum fuels.

(f) Equals the sum of distillate fuel oil, biodiesel product supplied, and renewable diesel product supplied.

(g) Prior to 2021, we did not publish biodiesel product supplied and instead included it as part of distillate fuel oil product supplied.

(h) Prior to 2021, we did not publish renewable diesel product supplied, and STEO values for that period are taken from the U.S. Environmental Protection Agency's Moderated Transaction System.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Petroleum Supply Monthly; Petroleum Supply Annual; and Weekly Petroleum Status Report.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 5a. U.S. Natural Gas Supply, Consumption, and Inventories
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Supply (billion cubic feet per day)															
U.S. total marketed natural gas production	113.3	112.1	113.1	114.2	115.6	116.8	116.3	115.7	115.7	115.9	116.0	116.2	113.2	116.1	115.9
Alaska	1.1	1.0	0.9	1.0	1.1	1.0	0.9	1.0	1.0	1.0	0.9	1.0	1.0	1.0	1.0
Federal Gulf of America (a)	1.8	1.8	1.8	1.8	1.8	1.8	1.7	1.7	1.8	1.8	1.6	1.6	1.8	1.8	1.7
Lower 48 States (excl GOA) (b)	110.4	109.3	110.4	111.4	112.7	114.0	113.7	112.9	112.9	113.2	113.4	113.5	110.4	113.3	113.2
Appalachia region	35.9	34.9	35.5	35.9	36.4	36.5	36.4	36.5	37.4	37.7	37.0	36.8	35.6	36.4	37.2
Bakken region	3.2	3.4	3.4	3.3	3.2	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3
Eagle Ford region	6.8	6.8	6.7	6.6	6.8	6.4	6.4	6.4	6.2	6.3	6.3	6.3	6.7	6.5	6.3
Haynesville region	15.8	14.3	14.3	13.9	15.2	15.7	15.1	14.6	14.1	14.2	14.9	15.7	14.6	15.1	14.7
Permian region	23.8	24.5	26.3	27.0	25.5	27.1	27.7	27.7	27.6	27.9	28.1	27.9	25.4	27.0	27.9
Rest of Lower 48 States	24.9	25.2	24.2	24.7	25.7	25.2	24.8	24.4	24.2	23.9	23.7	23.6	24.8	25.0	23.9
Total primary supply	104.6	78.9	85.9	92.6	110.4	77.6	84.4	93.5	105.5	78.0	86.4	94.7	90.5	91.4	91.1
Balancing item (c)	0.4	-1.3	-0.4	-1.0	0.4	-0.9	0.0	0.3	0.1	0.2	1.7	1.4	-0.6	0.0	0.8
Total supply	104.2	80.2	86.3	93.6	110.0	78.5	84.3	93.2	105.4	77.8	84.7	93.3	91.1	91.4	90.2
U.S. total dry natural gas production	103.9	102.0	103.0	103.8	105.6	106.4	106.1	105.4	105.5	105.4	105.3	105.5	103.2	105.9	105.4
Net inventory withdrawals	12.7	-9.6	-4.9	1.9	17.7	-12.9	-6.8	3.8	15.9	-10.6	-4.7	4.7	0.0	0.4	1.3
Supplemental gaseous fuels	0.4	0.3	0.3	0.3	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	0.3
Net imports	-12.8	-12.5	-12.2	-12.5	-13.7	-15.3	-15.4	-16.3	-16.4	-17.3	-16.2	-17.3	-12.5	-15.2	-16.8
LNG gross imports (d)	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.0	0.0	0.1
LNG gross exports (d)	12.4	11.3	11.4	12.6	14.2	14.1	14.3	15.8	16.2	15.8	15.2	16.8	11.9	14.6	16.0
Pipeline gross imports	8.9	7.8	8.4	9.0	9.9	7.9	8.5	8.8	9.5	8.1	8.8	8.9	8.5	8.8	8.8
Pipeline gross exports	9.4	8.9	9.2	8.9	9.4	9.1	9.6	9.3	9.8	9.6	9.7	9.4	9.1	9.4	9.6
Consumption (billion cubic feet per day)															
Total consumption	104.6	78.9	85.9	92.6	110.4	77.6	84.4	93.5	105.5	78.0	86.4	94.7	90.5	91.4	91.1
Residential	23.0	6.7	3.6	14.8	26.2	7.1	3.6	15.9	23.8	7.2	3.6	15.8	12.0	13.1	12.5
Commercial	14.4	6.4	4.9	10.8	16.3	6.7	4.8	11.3	14.9	6.6	4.9	11.3	9.1	9.8	9.4
Industrial	24.9	22.5	22.3	24.1	25.7	22.3	21.9	24.0	24.9	22.0	21.7	23.9	23.4	23.5	23.1
Electric power (e)	32.7	34.8	46.3	33.7	32.2	32.7	45.1	33.1	32.0	33.4	47.1	34.2	36.9	35.8	36.7
Lease and plant fuel	5.4	5.4	5.4	5.5	5.5	5.6	5.6	5.5	5.5	5.5	5.5	5.5	5.4	5.5	5.5
Pipeline and distribution	4.0	3.0	3.3	3.5	4.2	2.9	3.2	3.6	4.1	3.0	3.3	3.6	3.4	3.5	3.5
Vehicle	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
End-of-period working natural gas inventories (billion cubic feet) (f)															
United States total	2,306	3,175	3,615	3,438	1,836	3,015	3,638	3,290	1,857	2,825	3,257	2,826	3,438	3,290	2,826
East region	369	670	862	747	294	619	885	772	311	586	763	648	747	772	648
Midwest region	507	781	1,022	893	365	699	1,008	891	396	678	925	789	893	891	789
South Central region	1,007	1,172	1,121	1,216	778	1,150	1,192	1,192	863	1,141	1,089	1,011	1,216	1,192	1,011
Mountain region	168	238	282	259	170	230	239	197	108	155	200	157	259	197	157
Pacific region	231	286	296	295	205	288	281	209	155	237	246	193	295	209	193
Alaska	24	28	33	28	25	28	32	28	24	28	32	28	28	28	28

(a) Marketed production from U.S. Federal leases in the Gulf of America.

(b) Regional production in this table is based on geographic regions and not geologic formations.

(c) The balancing item is the difference between total natural gas consumption (NGTCPUS) and total natural gas supply (NGPSUPP).

(d) LNG: liquefied natural gas

(e) Natural gas used for electricity generation and (a limited amount of) useful thermal output by electric utilities and independent power producers.

(f) For a list of states in each inventory region refer to *Weekly Natural Gas Storage Report, Notes and Definitions* (<http://ir.eia.gov/ngs/notes.html>) .

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Natural Gas Monthly; and Electric Power Monthly.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 5b. U.S. Regional Natural Gas Prices (dollars per thousand cubic feet)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Wholesale price															
Henry Hub spot price	2.21	2.17	2.19	2.54	4.30	3.31	3.50	4.14	4.63	3.91	4.52	5.26	2.28	3.81	4.58
Residential retail (a)															
United States average	12.71	16.69	23.05	14.37	13.04	17.83	22.97	14.10	13.17	16.10	22.19	14.33	14.55	14.69	14.61
New England	19.13	20.47	23.85	20.88	21.48	20.00	22.97	18.77	19.07	19.99	23.34	19.41	20.19	20.57	19.63
Middle Atlantic	13.38	15.90	21.47	15.41	13.96	17.74	22.33	15.15	14.16	15.81	21.21	15.18	14.91	15.43	15.22
East North Central	9.24	14.56	23.30	10.83	9.59	15.23	23.61	11.41	10.17	14.28	23.58	11.83	11.27	11.70	12.08
West North Central	10.72	14.49	22.84	11.98	11.01	15.58	22.48	11.63	11.10	14.21	21.69	11.68	12.32	12.37	12.31
South Atlantic	14.59	21.83	31.84	17.02	14.57	23.26	29.43	16.03	15.30	21.06	29.16	16.55	17.55	17.03	17.54
East South Central	11.29	16.31	24.90	14.12	11.46	18.80	23.46	13.19	11.76	16.13	22.76	13.49	13.51	13.37	13.49
West South Central	12.55	22.10	28.89	20.36	13.54	24.28	28.92	16.11	12.46	19.17	25.65	15.57	17.25	16.71	15.43
Mountain	12.56	13.84	17.53	10.75	10.37	12.51	17.24	11.56	11.33	13.27	18.32	12.47	12.56	11.57	12.51
Pacific	17.71	17.23	19.09	18.51	19.98	20.15	19.69	17.85	18.28	16.95	18.23	17.56	18.02	19.32	17.81
Commercial retail (a)															
United States average	9.84	10.34	10.99	10.13	10.25	11.46	11.35	9.81	9.98	10.56	11.30	10.44	10.14	10.42	10.36
New England	12.89	12.95	12.33	12.86	13.62	12.57	12.60	11.91	12.48	13.04	13.35	12.93	12.83	12.86	12.80
Middle Atlantic	10.63	10.33	9.30	10.85	11.82	12.05	10.14	9.93	10.53	9.74	9.29	10.04	10.49	11.12	10.10
East North Central	7.42	8.94	11.09	8.26	8.00	9.90	10.75	7.95	8.18	9.41	11.31	8.89	8.19	8.43	8.81
West North Central	8.55	8.99	11.25	8.65	9.15	10.08	10.94	8.65	9.17	10.06	11.48	9.65	8.86	9.27	9.62
South Atlantic	10.38	10.33	10.65	10.44	10.58	12.04	11.73	10.83	10.78	11.32	11.71	11.30	10.42	11.01	11.15
East South Central	9.80	10.02	11.55	10.73	10.10	12.25	11.99	10.45	10.31	11.26	12.23	11.30	10.32	10.73	10.98
West South Central	9.27	9.80	10.37	10.76	9.79	11.29	11.15	9.88	9.48	10.26	11.09	10.53	9.92	10.28	10.16
Mountain	10.26	10.21	10.39	8.18	8.06	8.42	9.49	8.34	8.55	9.26	10.41	9.46	9.64	8.36	9.14
Pacific	14.00	12.48	13.95	13.83	15.17	14.73	14.31	13.54	14.18	13.27	13.67	13.52	13.63	14.47	13.73
Industrial retail (a)															
United States average	4.54	3.40	3.33	4.31	5.69	4.37	4.08	4.91	5.68	4.59	5.00	5.96	3.93	4.79	5.34
New England	11.14	9.59	7.03	9.43	11.69	11.42	9.14	9.91	11.22	10.37	9.14	10.50	9.59	10.98	10.44
Middle Atlantic	9.92	9.01	8.17	9.59	11.18	11.00	9.77	9.96	10.46	9.57	9.41	10.31	9.50	10.82	10.15
East North Central	6.34	6.16	5.95	6.25	6.88	7.70	7.07	6.90	7.45	7.46	7.58	7.85	6.24	7.04	7.59
West North Central	5.36	3.50	3.58	4.88	6.46	5.18	4.86	5.55	6.71	5.60	5.68	6.65	4.38	5.57	6.21
South Atlantic	5.22	4.54	4.66	5.19	6.37	5.74	5.47	6.00	6.94	6.05	6.39	7.19	4.93	5.91	6.67
East South Central	4.55	3.76	3.89	4.64	5.99	5.21	4.80	5.45	6.31	5.35	5.72	6.59	4.24	5.43	6.02
West South Central	2.52	2.05	2.23	2.87	4.01	3.37	3.53	4.28	4.86	3.94	4.51	5.36	2.42	3.79	4.67
Mountain	7.96	6.83	6.26	5.98	6.25	6.11	6.48	6.46	6.86	6.95	7.44	7.58	6.85	6.32	7.18
Pacific	8.82	7.26	7.56	8.50	9.05	8.39	7.89	8.08	8.85	7.78	7.84	8.31	8.13	8.62	8.27

 (a) For a list of states in each region see "Census division" in EIA's Energy Glossary (<http://www.eia.gov/glossary/index.html>).

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Prices are not adjusted for inflation.

Regions refer to U.S. Census divisions.

Sources:

 Historical data: Latest data available from Energy Information Administration databases supporting the Natural Gas Monthly. Henry Hub spot price is from Refinitiv, an LSEG company, via EIA (https://www.eia.gov/dnav/pet/pet_pri_spt_s1_d.htm).

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 6. U.S. Coal Supply, Consumption, and Inventories (million short tons)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Supply															
Total supply	104.6	96.9	126.8	100.2	126.6	103.0	121.9	98.6	104.2	87.1	120.1	98.4	428.5	450.0	409.8
Secondary inventory withdrawals	-2.2	-0.1	12.5	-5.2	17.2	-11.9	7.0	2.2	8.3	-5.4	15.3	0.7	5.0	14.4	18.9
Waste coal (a)	2.3	2.1	2.1	1.8	1.5	1.6	1.6	1.6	1.6	1.6	1.6	1.6	8.3	6.2	6.3
Total primary supply	104.5	94.9	112.2	103.6	107.9	113.4	113.3	94.9	94.3	91.0	103.2	96.2	415.2	429.4	384.7
U.S. total coal production	129.9	118.1	136.2	128.0	132.3	135.2	132.8	119.6	118.0	112.5	123.4	121.2	512.1	519.9	475.1
Appalachia	39.6	39.8	39.7	38.6	39.7	44.5	36.2	34.0	37.2	36.2	34.2	35.3	157.7	154.5	142.9
Interior	22.2	20.3	21.7	19.0	22.9	22.5	20.6	17.8	20.0	19.2	19.4	18.9	83.3	83.9	77.4
Western	68.1	58.0	74.7	70.4	69.7	68.1	75.9	67.8	60.9	57.2	69.8	66.9	271.2	281.5	254.8
Net imports	-26.5	-25.3	-26.6	-27.3	-23.8	-21.5	-21.4	-24.6	-23.1	-21.4	-22.1	-24.8	-105.6	-91.4	-91.4
Gross imports	0.3	0.5	0.7	0.4	0.6	1.2	1.4	1.1	0.8	1.3	1.3	1.1	2.0	4.3	4.5
Gross exports	26.8	25.8	27.3	27.7	24.4	22.7	22.8	25.7	24.0	22.6	23.3	25.9	107.6	95.7	95.8
Metallurgical coal	14.3	13.8	13.5	15.3	12.7	11.2	11.9	12.4	11.7	12.8	12.6	12.9	56.9	48.3	50.0
Steam coal	12.5	12.0	13.8	12.4	11.7	11.5	10.9	13.3	12.2	9.8	10.8	13.0	50.7	47.4	45.8
Primary inventory withdrawals	1.1	2.0	2.6	2.9	-0.7	-0.3	1.9	-0.1	-0.6	-0.2	1.9	-0.2	8.7	0.9	0.9
Consumption															
U.S. total coal consumption	100.3	91.0	120.4	99.3	118.5	96.1	121.9	98.6	104.2	87.1	120.1	98.4	411.0	435.0	409.8
Coke plants	3.9	3.8	3.5	4.0	3.7	3.5	3.6	3.7	3.6	3.7	3.8	3.8	15.1	14.5	14.8
Electric power sector (b)	90.8	82.0	111.6	89.4	109.0	87.6	113.3	89.3	95.0	78.8	111.7	89.2	373.8	399.2	374.8
Retail and other industry	5.7	5.2	5.2	5.9	5.8	5.0	4.9	5.6	5.6	4.6	4.6	5.4	22.0	21.3	20.2
Residential and commercial	0.2	0.1	0.1	0.2	0.3	0.1	0.1	0.2	0.3	0.1	0.1	0.2	0.6	0.8	0.8
Other industrial	5.4	5.2	5.1	5.8	5.5	4.8	4.8	5.4	5.3	4.5	4.5	5.2	21.4	20.6	19.4
Discrepancy (c)	4.3	5.9	6.4	0.9	8.0	6.9	0.0	0.0	0.0	0.0	0.0	0.0	17.6	14.9	0.0
End-of-period inventories															
Primary inventories (d)	23.7	21.7	19.1	16.2	16.9	17.1	15.2	15.3	15.9	16.1	14.2	14.4	16.2	15.3	14.4
Secondary inventories	140.0	140.1	127.6	132.8	115.6	127.6	120.6	118.4	110.1	115.5	100.2	99.5	132.8	118.4	99.5
Electric power sector	135.7	135.4	122.7	127.9	111.8	123.5	116.3	114.1	106.5	111.7	96.1	95.4	127.9	114.1	95.4
Retail and general industry	2.8	3.1	3.3	3.1	2.4	2.6	2.8	2.9	2.4	2.5	2.8	2.8	3.1	2.9	2.8
Coke plants	1.4	1.5	1.6	1.7	1.3	1.4	1.3	1.3	1.1	1.2	1.2	1.2	1.7	1.3	1.2
Commercial & institutional	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.2	0.1
Coal market indicators															
Coal miner productivity (tons per hour)	6.56	6.56	6.56	6.56	6.27	6.27	6.27	6.27	5.76	5.76	5.76	5.76	6.56	6.27	5.76
Total raw steel production (million short tons)	22.22	22.36	22.72	21.62	21.34	22.59	23.91	23.13	22.46	22.87	23.93	23.48	88.91	90.97	92.74
Cost of coal to electric utilities (dollars per million Btu) ..	2.50	2.55	2.45	2.44	2.43	2.47	2.45	2.44	2.46	2.47	2.47	2.45	2.48	2.45	2.46

(a) Waste coal includes waste coal and coal slurry reprocessed into briquettes.

(b) Coal used for electricity generation and (a limited amount of) useful thermal output by electric utilities and independent power producers.

(c) The discrepancy reflects an unaccounted-for shipper and receiver reporting difference, assumed to be zero in the forecast period.

(d) Primary stocks are held at the mines and distribution points.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Sources:

Historical data: Latest data available from Energy Information Administration databases supporting the following reports: Quarterly Coal Report; and Electric Power Monthly.

Table 7a. U.S. Electricity Industry Overview
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Electricity supply (billion kilowatthours)															
Total utility-scale power supply	1,027	1,046	1,220	1,024	1,080	1,057	1,239	1,041	1,067	1,087	1,284	1,070	4,318	4,418	4,508
Electricity generation (a)	1,026	1,045	1,214	1,020	1,074	1,054	1,233	1,039	1,065	1,084	1,277	1,068	4,304	4,400	4,495
Electric power sector	987	1,008	1,174	982	1,036	1,016	1,192	1,000	1,027	1,047	1,237	1,030	4,151	4,244	4,340
Industrial sector	35	33	35	33	35	34	36	35	34	33	36	34	137	139	137
Commercial sector	4	4	4	4	4	4	5	4	4	4	5	4	16	17	18
Net imports	2	1	7	5	6	3	6	2	3	3	6	2	14	17	13
Small-scale solar generation (c)															
Residential sector	17	25	25	17	19	28	28	19	21	32	31	21	85	95	106
Commercial sector	12	17	17	12	13	19	19	13	14	21	21	14	58	64	71
Industrial sector	5	7	7	4	5	8	8	5	6	9	9	6	22	25	29
Industrial sector	1	1	1	1	1	2	2	1	1	2	2	1	5	5	6
Losses and Unaccounted for (b)	50	61	53	56	58	64	51	55	53	66	54	57	220	229	230
Electricity consumption (billion kilowatthours)															
Total consumption	977	985	1,167	968	1,022	993	1,188	986	1,015	1,021	1,229	1,013	4,097	4,189	4,278
Sales to ultimate customers	942	952	1,132	935	988	959	1,152	952	981	987	1,194	979	3,962	4,051	4,141
Residential sector	362	342	454	332	390	338	453	337	371	339	464	337	1,490	1,517	1,511
Commercial sector	336	350	403	346	349	357	415	354	357	376	437	372	1,434	1,474	1,543
Industrial sector	243	258	274	256	247	263	282	260	251	271	291	268	1,031	1,052	1,080
Transportation sector	2	2	2	2	2	2	2	2	2	2	2	2	7	7	6
Direct use (d)	35	33	35	33	34	33	36	34	34	33	36	34	136	138	137
Average residential electricity usage per customer (kWh)	2,539	2,401	3,184	2,333	2,710	2,351	3,152	2,343	2,562	2,345	3,205	2,328	10,457	10,557	10,439
End-of-period fuel inventories held by electric power sector															
Coal (million short tons)	135.7	135.4	122.7	127.9	111.8	123.5	116.3	114.1	106.5	111.7	96.1	95.4	127.9	114.1	95.4
Residual fuel (million barrels)	6.0	5.8	5.3	5.1	4.8	4.7	4.0	4.1	4.0	3.9	3.2	3.3	5.1	4.1	3.3
Distillate fuel (million barrels)	17.0	16.8	16.5	16.0	18.2	16.0	16.0	16.3	16.2	16.1	16.0	16.3	16.0	16.3	16.3
Prices															
Power generation fuel costs (dollars per million Btu)															
Coal	2.50	2.55	2.45	2.44	2.43	2.47	2.45	2.44	2.46	2.47	2.47	2.45	2.48	2.45	2.46
Natural gas	3.37	2.37	2.37	3.03	4.98	3.26	3.39	4.24	4.98	3.90	4.33	5.29	2.75	3.91	4.60
Residual fuel oil	18.84	18.55	17.84	16.16	16.29	14.48	13.23	12.72	12.59	12.78	12.02	11.78	17.79	14.36	12.28
Distillate fuel oil	20.14	19.56	18.46	17.67	18.56	17.31	17.54	17.54	17.49	17.14	17.47	17.48	19.01	17.92	17.41
Prices to ultimate customers (cents per kilowatthour)															
Residential sector	16.01	16.53	16.67	16.70	16.44	17.32	17.40	17.32	17.20	17.92	17.96	17.88	16.48	17.12	17.75
Commercial sector	12.58	12.65	13.39	12.69	13.08	13.27	13.88	13.11	13.35	13.51	14.07	13.20	12.85	13.36	13.56
Industrial sector	7.87	8.04	8.64	8.01	8.27	8.38	8.79	8.23	8.39	8.44	8.92	8.30	8.15	8.43	8.52
Wholesale electricity prices (dollars per megawatthour)															
ERCOT North hub	32.53	39.94	33.54	28.54	35.72	37.33	39.98	33.62	37.76	48.55	88.54	47.43	33.64	36.66	55.57
CAISO SP15 zone	33.41	7.97	43.12	35.32	26.46	16.85	34.33	37.07	38.04	29.02	37.99	39.93	29.96	28.68	36.25
ISO-NE Internal hub	47.50	34.50	45.87	58.50	108.83	45.85	47.02	45.30	56.93	36.76	45.85	46.90	46.59	61.75	46.61
NYISO Hudson Valley zone	43.48	33.82	42.06	50.80	99.75	48.08	51.96	56.70	67.83	48.30	56.40	58.61	42.54	64.12	57.79
PJM Western hub	35.76	37.75	49.70	39.81	60.16	52.75	54.77	51.15	62.75	52.47	60.93	59.18	40.75	54.71	58.83
Midcontinent ISO Illinois hub	32.52	30.38	37.95	31.57	45.87	41.64	40.00	37.64	41.57	37.35	42.52	40.59	33.11	41.29	40.51
SPP ISO South hub	31.66	33.95	47.92	46.52	38.41	36.01	50.50	43.31	43.68	41.67	52.02	45.80	40.01	42.06	45.79
SERC index, Into Southern	27.96	29.20	31.53	29.85	43.28	40.13	39.30	38.27	41.46	38.26	42.08	40.79	29.64	40.25	40.65
FRCC index, Florida Reliability	30.01	31.81	33.26	30.89	46.10	42.43	41.41	41.19	42.12	41.25	45.81	44.08	31.49	42.78	43.31
Northwest index, Mid-Columbia	99.74	32.91	60.98	45.09	53.72	35.11	49.57	54.96	58.25	40.66	55.00	60.41	59.68	48.34	53.58
Southwest index, Palo Verde	29.62	11.22	50.17	34.98	27.88	23.45	41.22	39.97	40.90	32.89	43.97	42.63	31.50	33.13	40.10

(a) Generation supplied by utility-scale power plants with capacity of at least one megawatt.
(b) Includes transmission and distribution losses, data collection time-frame differences, and estimation error.
(c) Solar photovoltaic systems smaller than one megawatt such as those installed on rooftops.
(d) Direct use represents commercial and industrial facility use of onsite net electricity generation; and electrical sales or transfers to adjacent or colocated facilities for which revenue information is not available. See Table 7.6 of the EIA Monthly Energy Review.

Notes:
EIA completed modeling and analysis for this report on July 2, 2025.
The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.
kWh = kilowatthours. Btu = British thermal units.
Prices are not adjusted for inflation.

Sources:
Historical data: Latest data available from EIA databases supporting the following reports: Electric Power Monthly and Electric Power Annual (electricity supply and consumption, fuel inventories and costs, and retail electricity prices); S&P Global Market Intelligence (wholesale electricity prices).

Table 7b. U.S. Regional Electricity Sales to Ultimate Customers (billion kilowatthours)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
All sectors (a)	942.3	951.9	1,132.3	935.3	987.5	959.3	1,152.1	951.9	980.7	987.5	1,193.6	978.9	3,961.9	4,050.8	4,140.7
New England	28.6	26.3	30.3	26.4	29.3	26.4	30.5	26.3	28.6	26.0	30.6	26.3	111.6	112.5	111.4
Middle Atlantic	87.2	83.6	101.7	83.0	91.9	82.1	103.5	84.8	91.2	84.6	105.6	86.3	355.5	362.4	367.7
E. N. Central	136.1	134.1	153.2	131.2	141.6	133.1	157.3	134.0	141.4	136.8	160.4	137.1	554.6	565.9	575.7
W. N. Central	79.2	75.6	86.9	76.6	83.3	77.0	90.2	78.6	82.8	78.2	91.9	79.7	318.4	329.2	332.7
S. Atlantic	203.9	214.2	250.6	203.2	215.9	215.0	252.7	206.3	208.6	217.0	258.8	209.4	871.8	889.9	893.8
E. S. Central	76.8	74.8	89.8	72.4	80.2	75.5	90.2	73.3	77.0	75.7	90.9	73.3	313.8	319.3	317.0
W. S. Central	161.3	174.2	211.4	169.1	172.9	178.1	222.8	174.9	178.9	195.2	246.8	192.7	716.0	748.6	813.7
Mountain	69.8	76.0	94.2	71.8	71.1	77.0	92.9	72.3	71.4	78.6	95.3	72.9	311.7	313.3	318.1
Pacific contiguous	95.8	89.6	110.5	97.7	97.6	91.4	108.1	97.5	97.0	91.6	109.5	97.4	393.5	394.5	395.5
AK and HI	3.7	3.6	3.8	3.9	3.7	3.6	3.8	3.9	3.7	3.6	3.8	3.9	15.0	15.1	15.0
Residential sector	361.7	342.1	453.6	332.3	389.6	337.9	453.1	336.8	370.9	339.4	464.0	337.0	1,489.6	1,517.5	1,511.3
New England	12.7	10.9	13.4	11.1	13.4	10.9	13.7	11.2	13.0	10.9	13.9	11.2	48.2	49.2	48.9
Middle Atlantic	33.7	30.6	41.2	29.8	36.9	30.0	41.5	30.0	35.4	29.8	42.3	30.1	135.3	138.5	137.6
E. N. Central	46.9	43.4	54.5	41.6	50.8	42.2	56.3	42.4	49.0	41.7	56.1	42.3	186.4	191.7	189.1
W. N. Central	28.6	23.9	30.3	24.5	31.1	23.8	32.0	25.5	30.1	24.3	32.7	25.7	107.2	112.3	112.8
S. Atlantic	91.1	91.5	115.8	86.2	99.9	91.8	115.4	87.0	91.8	91.2	117.8	86.7	384.6	394.1	387.5
E. S. Central	31.5	27.0	36.9	26.0	34.0	26.7	36.9	27.1	31.5	27.1	37.7	27.1	121.6	124.7	123.4
W. S. Central	53.7	57.0	80.5	52.0	58.8	54.9	80.2	52.7	55.7	55.8	83.5	52.6	243.2	246.6	247.6
Mountain	24.4	26.8	38.1	24.2	24.8	26.2	36.4	24.2	24.6	27.1	37.8	24.4	113.6	111.6	114.0
Pacific contiguous	37.8	29.8	41.7	35.5	38.8	30.1	39.7	35.5	38.5	30.5	41.1	35.6	144.8	144.1	145.6
AK and HI	1.2	1.1	1.2	1.3	1.2	1.1	1.2	1.3	1.2	1.1	1.2	1.2	4.7	4.7	4.7
Commercial sector	335.6	350.1	402.7	345.6	348.6	356.9	415.1	353.8	357.1	375.8	437.4	372.4	1,434.0	1,474.4	1,542.8
New England	12.2	11.8	12.9	11.6	12.3	11.8	12.9	11.5	12.1	11.6	12.9	11.5	48.5	48.5	48.1
Middle Atlantic	35.2	34.2	41.0	35.1	37.2	34.1	42.4	36.6	38.1	36.2	43.4	37.7	145.5	150.3	155.4
E. N. Central	43.4	43.7	49.8	43.2	45.2	44.2	51.6	44.9	46.8	47.5	54.5	47.4	180.1	186.0	196.2
W. N. Central	26.4	26.6	29.8	26.8	27.8	27.1	30.6	27.3	28.0	27.6	31.1	27.6	109.5	112.8	114.3
S. Atlantic	79.7	87.9	98.9	83.0	83.0	88.4	100.7	84.8	83.6	90.3	103.7	87.4	349.5	356.9	365.0
E. S. Central	21.5	23.1	27.1	21.8	21.8	23.2	27.0	21.7	21.4	23.2	27.1	21.7	93.4	93.6	93.4
W. S. Central	50.5	54.4	63.8	53.8	52.8	57.7	70.8	56.7	58.8	68.4	84.7	68.6	222.5	238.0	280.5
Mountain	25.1	27.0	32.0	26.3	26.4	28.1	32.1	26.6	26.6	28.7	32.9	26.9	110.4	113.2	115.2
Pacific contiguous	40.3	40.2	46.1	42.5	40.7	41.0	45.5	42.4	40.4	41.0	45.6	42.2	169.1	169.6	169.3
AK and HI	1.3	1.3	1.4	1.4	1.3	1.3	1.4	1.4	1.3	1.3	1.4	1.4	5.4	5.5	5.4
Industrial sector	243.3	258.1	274.2	255.7	247.5	262.9	282.2	259.6	251.0	270.7	290.5	267.9	1,031.3	1,052.3	1,080.2
New England	3.5	3.6	3.8	3.6	3.5	3.6	3.8	3.5	3.4	3.5	3.7	3.4	14.4	14.3	14.0
Middle Atlantic	17.4	17.9	18.6	17.1	16.7	17.2	18.9	17.4	16.9	17.9	19.1	17.7	71.0	70.1	71.5
E. N. Central	45.8	46.8	48.7	46.3	45.5	46.5	49.2	46.6	45.5	47.5	49.7	47.2	187.6	187.8	189.9
W. N. Central	24.2	25.1	26.9	25.3	24.5	26.1	27.7	25.8	24.7	26.3	28.1	26.4	101.5	104.1	105.5
S. Atlantic	32.8	34.5	35.6	33.7	32.7	34.6	36.3	34.2	33.0	35.3	37.0	35.0	136.5	137.8	140.2
E. S. Central	23.8	24.7	25.8	24.5	24.4	25.7	26.3	24.6	24.1	25.5	26.1	24.5	98.8	101.0	100.2
W. S. Central	57.2	62.7	67.1	63.2	61.3	65.4	71.7	65.5	64.4	71.0	78.5	71.5	250.3	263.8	285.4
Mountain	20.2	22.2	24.0	21.2	20.0	22.6	24.4	21.4	20.1	22.7	24.5	21.5	87.6	88.4	88.8
Pacific contiguous	17.4	19.4	22.5	19.5	17.9	20.1	22.7	19.4	17.8	19.9	22.6	19.4	78.8	80.1	79.8
AK and HI	1.2	1.2	1.3	1.3	1.2	1.2	1.3	1.3	1.2	1.2	1.3	1.3	4.9	4.9	4.9

(a) Total includes sales of electricity to ultimate customers in transportation sector (not shown), as well as residential, commercial, and industrial sectors.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Electricity sales to ultimate customers are sold by electric utilities and power marketers for direct consumption by the customer and not available for resale. Includes electric sales to end users by third-party owners of behind-the-meter solar photovoltaic systems.

 Regions refer to U.S. Census divisions (https://www.eia.gov/tools/glossary/index.php?id=C#census_division).

Sources:

Historical data: Latest data available from EIA databases supporting the following reports: Electric Power Monthly and Electric Power Annual.

Table 7c. U.S. Regional Electricity Prices to Ultimate Customers (Cents per Kilowatthour)

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
All sectors (a)															
United States average ...	12.68	12.80	13.55	12.84	13.20	13.35	14.02	13.27	13.53	13.64	14.32	13.47	13.00	13.48	13.77
New England	23.18	22.01	23.26	23.74	25.38	24.27	25.14	25.30	26.69	25.17	25.81	25.95	23.06	25.04	25.92
Middle Atlantic	15.57	15.76	17.05	16.00	17.27	17.02	18.10	16.79	17.77	17.36	18.45	17.10	16.14	17.34	17.72
E. N. Central	12.04	12.30	12.55	12.15	12.77	12.97	13.08	12.67	13.19	13.29	13.45	12.97	12.27	12.88	13.23
W. N. Central	9.97	10.66	11.57	10.04	10.13	10.75	11.80	10.24	10.32	10.92	11.97	10.39	10.59	10.76	10.93
S. Atlantic	11.98	11.86	12.06	11.96	12.33	12.33	12.58	12.53	12.80	12.81	13.09	12.87	11.97	12.45	12.90
E. S. Central	10.95	10.88	11.10	11.09	11.50	11.58	11.66	11.60	11.86	11.82	11.91	11.86	11.01	11.58	11.87
W. S. Central	9.43	9.57	10.18	9.60	9.67	10.11	10.61	9.81	9.69	10.15	10.75	9.80	9.73	10.09	10.15
Mountain	10.71	11.29	11.81	10.76	10.87	11.50	12.10	11.22	11.33	11.99	12.54	11.49	11.20	11.47	11.90
Pacific	19.14	20.53	23.32	19.84	19.51	20.71	23.60	20.09	19.91	21.39	24.36	20.72	20.80	21.05	21.69
Residential sector															
United States average ...	16.01	16.53	16.67	16.70	16.44	17.32	17.40	17.32	17.20	17.92	17.96	17.88	16.48	17.12	17.75
New England	27.63	26.57	27.77	28.43	29.27	28.85	29.87	30.00	30.56	29.72	30.77	31.28	27.61	29.51	30.60
Middle Atlantic	19.91	20.47	21.18	20.83	21.15	22.03	22.44	21.80	21.94	22.50	22.85	22.40	20.62	21.86	22.44
E. N. Central	16.04	16.89	16.52	16.71	16.60	17.73	17.20	17.44	17.37	18.50	17.92	18.03	16.53	17.21	17.93
W. N. Central	12.28	13.97	14.72	13.04	12.41	14.31	14.88	13.23	12.77	14.51	15.08	13.42	13.52	13.70	13.96
S. Atlantic	14.43	14.58	14.44	14.71	14.69	15.21	15.11	15.42	15.55	16.01	15.85	15.98	14.53	15.10	15.85
E. S. Central	13.19	13.57	13.26	13.90	13.67	14.58	13.90	14.39	14.33	14.84	14.19	14.78	13.45	14.09	14.50
W. S. Central	13.53	13.95	14.11	14.53	13.86	14.87	14.93	15.12	14.50	15.32	15.39	15.90	14.03	14.70	15.28
Mountain	13.56	14.36	14.29	14.01	13.77	14.74	14.93	14.94	14.66	15.56	15.68	15.43	14.09	14.63	15.37
Pacific	22.03	25.17	26.02	23.33	22.48	25.20	26.78	23.56	22.87	25.94	27.31	23.90	24.14	24.50	25.02
Commercial sector															
United States average ...	12.58	12.65	13.39	12.69	13.08	13.27	13.88	13.11	13.35	13.51	14.07	13.20	12.85	13.36	13.56
New England	20.54	19.84	20.67	21.42	23.20	22.40	22.47	23.07	24.69	23.39	22.91	23.22	20.62	22.78	23.55
Middle Atlantic	14.98	15.54	16.74	15.59	16.83	16.62	17.85	16.50	17.49	17.24	18.28	16.79	15.75	16.99	17.48
E. N. Central	12.02	12.28	12.34	12.03	12.57	12.86	12.78	12.49	12.99	13.16	13.02	12.69	12.17	12.68	12.97
W. N. Central	9.80	10.37	11.30	9.80	9.85	10.47	11.63	10.05	9.97	10.58	11.77	10.19	10.35	10.53	10.66
S. Atlantic	11.00	10.70	10.67	10.89	11.23	11.05	11.19	11.47	11.69	11.48	11.58	11.75	10.81	11.23	11.62
E. S. Central	12.39	12.26	12.26	12.58	13.08	13.14	13.08	13.27	13.57	13.49	13.32	13.51	12.36	13.14	13.47
W. S. Central	8.90	8.95	9.31	9.05	9.02	9.73	9.90	9.07	8.84	9.78	10.03	8.96	9.07	9.47	9.46
Mountain	10.53	11.21	11.53	10.67	10.65	11.43	11.94	11.04	10.97	11.75	12.15	11.24	11.02	11.30	11.56
Pacific	19.03	19.89	23.79	19.29	19.41	20.69	24.00	19.49	19.76	21.25	24.86	20.34	20.60	20.97	21.64
Industrial sector															
United States average ...	7.87	8.04	8.64	8.01	8.27	8.38	8.79	8.23	8.39	8.44	8.92	8.30	8.15	8.43	8.52
New England	16.56	15.49	16.38	17.01	18.50	16.78	17.57	18.11	19.57	17.38	17.75	18.13	16.36	17.73	18.19
Middle Atlantic	8.43	8.22	8.74	8.56	9.86	9.14	9.20	8.84	9.81	9.14	9.24	8.86	8.49	9.25	9.26
E. N. Central	7.97	8.05	8.33	8.18	8.72	8.77	8.71	8.54	8.90	8.87	8.90	8.72	8.13	8.68	8.85
W. N. Central	7.42	7.80	8.31	7.38	7.57	7.80	8.42	7.51	7.74	7.96	8.58	7.65	7.74	7.84	7.99
S. Atlantic	7.55	7.59	8.15	7.57	7.98	7.96	8.40	7.86	8.02	7.97	8.55	7.97	7.72	8.06	8.13
E. S. Central	6.68	6.62	6.76	6.78	7.06	7.05	7.04	7.05	7.12	7.09	7.16	7.17	6.71	7.05	7.14
W. S. Central	6.04	6.10	6.30	6.02	6.20	6.46	6.46	6.17	6.29	6.44	6.59	6.14	6.12	6.33	6.37
Mountain	7.47	7.67	8.25	7.16	7.56	7.84	8.11	7.23	7.74	8.04	8.25	7.36	7.66	7.71	7.86
Pacific	13.12	14.76	17.45	14.70	13.35	14.11	17.32	15.13	13.98	14.83	18.11	15.83	15.15	15.10	15.81

(a) Average price to all sectors is weighted by sales of electricity to ultimate customers in the residential, commercial, industrial and transportation (not shown) sectors.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray. consumers by the corresponding sales of electricity.

Prices are not adjusted for inflation.

 Regions refer to U.S. Census divisions (https://www.eia.gov/tools/glossary/index.php?id=C#census_division).

Sources:

Historical data: Latest data available from EIA databases supporting the following reports: Electric Power Monthly and Electric Power Annual.

Table 7d part 1. U.S. Regional Electricity Generation, Electric Power Sector (billion kilowatthours), continues on Table 7d part 2
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
United States															
Total generation	986.6	1,008.0	1,174.0	982.2	1,035.7	1,015.9	1,192.4	1,000.2	1,026.6	1,046.6	1,236.9	1,029.9	4,150.9	4,244.2	4,340.0
Natural gas	394.7	408.9	552.6	402.9	380.9	384.5	535.8	395.7	375.8	387.4	555.7	407.2	1,759.2	1,696.9	1,726.0
Coal	156.9	143.6	194.0	153.7	193.3	154.9	198.5	155.9	167.5	139.2	195.6	155.6	648.2	702.6	657.9
Nuclear	197.0	190.8	202.3	191.9	196.0	185.2	207.1	195.5	198.2	194.4	209.6	197.9	782.0	783.8	800.2
Renewable energy sources:	234.1	261.2	222.1	230.3	259.7	288.3	249.0	249.7	281.2	323.4	274.5	267.0	947.7	1,046.7	1,146.1
Conventional hydropower ...	65.0	62.9	58.9	54.2	62.3	67.3	59.4	57.0	67.7	76.9	63.4	57.5	241.0	246.0	265.5
Wind	122.1	124.2	85.7	121.3	133.7	124.2	89.1	125.8	138.0	132.3	93.2	131.6	453.2	472.8	495.1
Solar (a)	37.8	65.2	68.1	46.1	54.5	88.2	90.9	57.8	66.4	105.7	108.4	68.9	217.3	291.5	349.4
Biomass	5.2	5.1	5.4	4.9	5.1	4.9	5.5	5.0	5.1	4.9	5.4	4.9	20.5	20.5	20.3
Geothermal	4.0	3.9	3.9	3.9	4.1	3.8	4.1	4.0	4.1	3.5	4.1	4.1	15.7	15.9	15.9
Pumped storage hydropower ..	-1.2	-1.2	-2.1	-1.4	-1.3	-1.6	-3.1	-1.7	-1.2	-1.8	-3.1	-1.8	-5.9	-7.6	-7.9
Petroleum (b)	3.6	3.5	3.9	3.5	5.9	3.5	4.0	4.1	4.1	3.1	3.8	3.4	14.5	17.4	14.4
Other fossil gases	0.7	0.7	0.7	0.7	0.7	0.7	0.9	0.8	0.7	0.7	0.8	0.8	2.8	3.0	3.1
Other nonrenewable fuels (c) ..	0.7	0.6	0.6	0.6	0.5	0.4	0.2	0.3	0.2	0.2	-0.1	-0.1	2.5	1.4	0.2
New England (ISO-NE)															
Total generation	26.0	24.8	29.2	24.8	26.1	24.8	29.2	24.5	25.6	24.1	29.8	24.7	104.8	104.6	104.2
Natural gas	13.2	12.0	17.1	14.0	12.7	13.0	17.3	11.6	12.2	12.6	17.3	12.3	56.3	54.7	54.4
Coal	0.0	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.3	0.3	0.3
Nuclear	7.0	7.3	6.9	5.4	7.2	6.1	7.1	7.1	7.0	5.3	7.1	6.1	26.5	27.7	25.6
Conventional hydropower	2.5	2.1	1.9	2.0	2.1	1.8	1.2	1.7	2.0	2.2	1.2	1.8	8.5	6.8	7.2
Nonhydro renewables (d)	3.0	3.3	3.0	3.0	3.3	3.6	3.3	3.4	3.8	3.8	3.8	4.1	12.2	13.6	15.5
Other energy sources (e)	0.3	0.2	0.2	0.3	0.7	0.2	0.2	0.4	0.4	0.2	0.2	0.3	1.0	1.5	1.1
Net energy for load (f)	29.6	27.0	32.0	28.1	30.6	26.9	32.3	28.2	30.1	27.5	33.5	29.0	116.8	118.1	120.0
New York (NYISO)															
Total generation	32.7	32.4	36.7	32.6	33.3	32.4	37.0	31.5	31.3	31.0	37.7	32.2	134.4	134.1	132.2
Natural gas	15.9	15.5	21.3	16.1	15.9	15.4	20.5	14.4	14.3	14.0	21.2	14.6	68.8	66.2	63.9
Coal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nuclear	6.5	7.2	6.4	7.0	6.8	7.1	7.2	7.2	6.2	6.9	6.8	7.2	27.1	28.3	27.1
Conventional hydropower	7.7	7.1	6.8	6.7	6.6	6.7	6.8	7.0	6.9	6.9	6.9	7.1	28.4	27.0	27.7
Nonhydro renewables (d)	2.4	2.6	2.2	2.7	3.3	3.1	2.5	2.7	3.6	3.3	2.8	3.4	9.9	11.6	13.0
Other energy sources (e)	0.1	0.0	0.0	0.1	0.8	0.0	0.0	0.2	0.3	0.0	0.1	0.1	0.3	1.0	0.5
Net energy for load (f)	37.0	35.7	42.4	35.9	38.2	35.7	43.6	36.0	38.0	36.4	45.1	37.1	150.9	153.6	156.5
Mid-Atlantic (PJM)															
Total generation	217.8	207.8	241.5	205.5	230.9	208.8	253.2	218.0	232.0	217.1	260.0	227.8	872.6	910.9	936.8
Natural gas	95.5	90.9	117.3	89.4	96.0	87.3	120.5	94.7	97.8	90.1	124.2	98.7	393.0	398.5	410.8
Coal	36.2	34.9	40.0	31.0	46.5	36.5	46.3	37.8	44.7	38.1	47.5	40.9	142.1	167.1	171.3
Nuclear	68.9	64.4	70.4	68.8	68.2	65.0	71.1	67.5	67.7	66.7	71.3	68.7	272.4	271.7	274.4
Conventional hydropower	3.0	2.1	1.9	1.8	2.3	2.2	1.7	2.1	2.7	2.6	1.7	2.1	8.8	8.2	9.2
Nonhydro renewables (d)	14.0	15.3	12.0	14.4	17.1	17.7	14.0	15.5	18.8	19.5	15.7	17.3	55.7	64.4	71.2
Other energy sources (e)	0.2	0.2	0.0	0.2	0.9	0.1	-0.4	0.3	0.3	0.0	-0.4	0.0	0.6	0.9	-0.1
Net energy for load (f)	207.2	199.4	227.5	197.7	219.9	198.7	239.0	208.5	223.3	209.9	249.0	219.6	831.7	866.1	901.8
Southeast (SERC)															
Total generation	153.0	158.4	180.3	148.0	158.4	156.9	178.3	145.2	149.4	154.2	180.8	146.0	639.6	638.8	630.5
Natural gas	58.8	63.2	82.7	60.7	64.4	62.6	77.3	55.5	58.1	59.7	77.6	55.1	265.4	259.8	250.5
Coal	23.3	24.4	28.7	22.1	27.6	25.5	26.1	19.0	19.0	20.4	27.0	18.8	98.6	98.2	85.2
Nuclear	55.9	56.8	55.6	53.5	52.2	52.9	60.4	56.8	55.1	56.0	60.1	57.1	221.8	222.3	228.3
Conventional hydropower	9.6	6.2	6.2	6.4	7.7	7.1	7.2	8.1	10.7	8.3	7.6	8.3	28.5	30.1	34.9
Nonhydro renewables (d)	5.4	8.0	7.5	5.6	6.5	9.4	8.5	6.1	6.7	10.6	9.7	7.1	26.5	30.6	34.0
Other energy sources (e)	0.0	-0.3	-0.5	-0.3	0.0	-0.7	-1.1	-0.3	-0.1	-0.8	-1.2	-0.4	-1.2	-2.2	-2.5
Net energy for load (f)	140.3	142.6	162.2	135.1	147.1	142.7	161.7	132.8	136.0	138.2	162.1	133.0	580.3	584.3	569.3
Florida (FRCC)															
Total generation	54.7	68.4	79.0	58.5	55.6	69.2	76.8	59.6	55.7	66.8	76.5	59.8	260.6	261.2	258.8
Natural gas	41.5	51.9	62.9	46.0	40.1	50.6	59.2	45.1	40.5	48.4	58.0	43.9	202.2	195.0	190.9
Coal	1.4	2.3	3.0	1.1	1.7	2.7	3.1	1.4	1.3	2.6	3.4	1.9	7.8	8.8	9.2
Nuclear	7.5	7.5	7.3	6.8	7.5	7.9	7.5	7.7	7.2	7.0	7.5	8.1	29.1	30.6	29.7
Conventional hydropower	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.2	0.2
Nonhydro renewables (d)	4.0	6.2	5.2	4.3	5.7	7.6	6.3	5.0	6.1	8.3	7.0	5.6	19.7	24.6	27.0
Other energy sources (e)	0.3	0.5	0.5	0.3	0.6	0.4	0.6	0.4	0.5	0.5	0.6	0.4	1.6	2.0	1.9
Net energy for load (f)	53.9	70.2	80.2	59.7	55.5	70.8	78.8	60.7	56.1	69.3	79.6	60.9	263.9	265.7	265.9

(a) Generation from utility-scale (larger than 1 megawatt) solar photovoltaic and solar thermal power plants. Excludes generation from small-scale solar photovoltaic systems (see Table 7a).

(b) Residual fuel oil, distillate fuel oil, petroleum coke, and other petroleum liquids.

(c) Batteries, chemicals, hydrogen, pitch, purchased steam, sulfur, nonrenewable waste, and miscellaneous technologies.

(d) Wind, large-scale solar, biomass, and geothermal

(e) Pumped storage hydroelectric, petroleum, other fossil gases, batteries, and other nonrenewable fuels. See notes (b) and (c).

(f) Includes regional generation from generating units operated by electric power sector, plus energy receipts from neighboring U.S. balancing authorities outside region minus energy deliveries to neighboring balancing authorities.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

The electric power sector includes utility-scale generating power plants (total capacity is larger than 1 megawatt) operated by electric utilities and independent power producers whose primary business is to sell electricity over the transmission grid for consumption by the public.

Sources:

Table 7d part 2. U.S. Regional Electricity Generation, Electric Power Sector (billion kilowatthours), continued from Table 7d part 1

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Midwest (MISO)															
Total generation	146.4	149.2	170.6	149.2	159.8	149.3	171.2	148.5	154.8	149.0	173.9	150.4	615.4	628.7	628.1
Natural gas	48.1	54.0	69.0	49.0	41.4	47.2	66.3	47.6	42.2	47.4	67.7	48.5	220.1	202.4	205.7
Coal	42.8	38.1	51.3	42.1	53.3	42.6	51.6	40.6	45.0	33.9	47.8	39.6	174.4	188.1	166.3
Nuclear	20.9	21.8	25.1	22.7	23.3	20.2	23.2	22.3	24.6	25.0	25.9	23.4	90.5	88.9	98.9
Conventional hydropower	2.3	2.1	2.0	2.0	2.2	2.3	1.9	2.0	2.3	2.7	2.2	2.1	8.5	8.4	9.2
Nonhydro renewables (d)	31.7	32.7	22.7	32.8	39.0	36.4	27.3	35.0	40.0	39.4	29.6	36.3	119.9	137.7	145.3
Other energy sources (e)	0.7	0.5	0.4	0.5	0.7	0.7	0.8	0.9	0.7	0.5	0.7	0.7	2.1	3.2	2.7
Net energy for load (f)	159.9	160.1	182.5	158.1	166.3	162.0	187.0	160.4	165.1	162.0	189.1	162.3	660.6	675.8	678.5
Central (Southwest Power Pool)															
Total generation	75.8	75.9	88.5	74.3	81.4	76.5	86.9	72.1	74.4	74.6	87.6	71.9	314.5	316.8	308.5
Natural gas	20.1	22.7	31.6	19.4	18.4	20.3	30.0	18.4	15.7	19.1	30.4	18.3	93.7	87.2	83.6
Coal	17.7	15.5	25.7	18.1	23.4	17.6	24.2	16.5	18.2	12.9	22.7	14.6	77.0	81.7	68.4
Nuclear	4.3	3.2	4.1	3.8	4.4	4.3	4.2	3.1	4.2	4.2	4.2	3.6	15.3	15.9	16.1
Conventional hydropower	3.3	2.9	2.8	2.8	3.1	3.7	3.5	3.0	3.4	4.1	3.7	3.0	11.7	13.3	14.2
Nonhydro renewables (d)	30.2	31.2	24.1	30.2	31.8	30.3	24.8	30.9	32.7	33.9	26.5	32.2	115.7	117.8	125.3
Other energy sources (e)	0.3	0.4	0.2	0.2	0.3	0.3	0.1	0.1	0.3	0.3	0.1	0.1	1.1	0.9	0.8
Net energy for load (f)	75.6	75.9	89.5	73.9	80.1	77.2	90.1	72.6	74.5	73.5	88.0	71.1	314.8	320.0	307.1
Texas (ERCOT)															
Total generation	102.3	115.7	133.1	107.8	110.9	120.4	144.6	117.1	119.1	140.1	165.2	129.9	459.0	493.0	554.3
Natural gas	42.9	51.5	69.1	45.1	42.3	46.3	68.0	44.6	43.7	55.4	79.6	52.0	208.6	201.2	230.8
Coal	12.0	12.4	18.2	14.9	15.4	13.3	21.4	18.0	16.8	16.8	23.0	19.0	57.6	68.2	75.7
Nuclear	10.0	9.1	10.6	9.0	10.8	10.2	10.7	10.1	10.7	8.8	10.9	10.2	38.6	41.8	40.6
Conventional hydropower	0.2	0.1	0.1	0.1	0.2	0.2	0.1	0.1	0.1	0.2	0.1	0.1	0.5	0.5	0.6
Nonhydro renewables (d)	36.9	42.3	34.8	38.5	41.9	50.2	44.2	44.0	47.6	58.6	51.4	48.6	152.5	180.3	206.2
Other energy sources (e)	0.3	0.3	0.3	0.3	0.4	0.3	0.2	0.1	0.2	0.3	0.1	0.0	1.2	1.0	0.5
Net energy for load (f)	101.0	117.8	134.8	107.9	109.9	120.8	144.6	117.1	119.1	140.1	165.2	129.9	461.5	492.3	554.3
Northwest															
Total generation	93.2	86.8	99.8	93.1	96.9	87.1	100.6	93.8	99.2	94.2	106.1	95.1	372.9	378.4	394.6
Natural gas	27.2	20.7	31.7	25.4	23.5	17.3	29.6	24.5	22.9	15.2	31.3	24.8	105.0	94.8	94.1
Coal	17.4	11.1	19.1	18.2	19.5	12.5	19.4	18.1	17.8	10.1	17.9	16.4	65.9	69.6	62.2
Nuclear	2.5	2.5	2.5	2.5	2.4	0.3	2.4	2.4	2.4	2.4	2.4	2.4	10.0	7.6	9.7
Conventional hydropower	26.8	27.8	25.9	26.5	29.1	31.9	27.0	27.1	32.1	38.4	29.8	27.3	107.0	115.2	127.6
Nonhydro renewables (d)	19.0	24.6	20.5	20.3	22.2	24.8	22.0	21.6	23.8	28.0	24.5	24.0	84.4	90.6	100.3
Other energy sources (e)	0.3	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.2	0.1	0.2	0.2	0.6	0.6	0.7
Net energy for load (f)	93.4	86.2	97.1	90.2	95.5	86.1	95.6	91.0	94.3	88.7	99.9	92.6	366.9	368.3	375.5
Southwest															
Total generation	34.6	37.1	46.5	36.8	33.8	36.5	47.3	37.7	36.1	40.3	50.5	39.1	155.0	155.3	166.1
Natural gas	12.4	15.3	23.1	16.7	11.4	12.8	21.1	15.8	11.3	13.2	22.0	15.6	67.4	61.1	62.2
Coal	5.1	4.0	5.6	3.7	3.7	3.5	5.4	3.8	4.1	4.0	5.7	3.8	18.2	16.5	17.6
Nuclear	8.7	7.4	8.7	7.5	8.5	7.3	8.6	7.5	8.4	7.5	8.6	7.5	32.4	31.9	32.0
Conventional hydropower	1.7	2.2	1.6	1.5	1.8	2.1	1.8	1.3	1.6	2.1	1.9	1.4	7.0	7.0	7.1
Nonhydro renewables (d)	6.8	8.3	7.4	7.4	8.3	10.9	10.3	9.3	10.6	13.6	12.2	10.7	29.9	38.7	47.1
Other energy sources (e)	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	-0.1	0.1	0.0	0.1	0.1	0.0
Net energy for load (f)	23.5	29.7	38.9	25.3	24.6	29.3	37.5	25.7	24.9	31.2	39.2	26.0	117.4	117.1	121.3
California															
Total generation	46.5	48.0	64.8	47.8	45.2	50.6	63.7	48.5	45.2	51.7	65.1	49.1	207.2	207.9	211.1
Natural gas	18.6	10.7	26.0	20.6	14.3	11.2	25.4	22.8	16.4	11.6	25.8	22.5	75.8	73.6	76.3
Coal	0.7	0.6	2.0	2.3	1.9	0.5	0.4	0.0	0.0	0.0	0.0	0.0	5.7	2.9	0.0
Nuclear	4.9	3.6	4.9	4.9	4.8	3.9	4.7	3.6	4.6	4.7	4.7	3.6	18.4	17.1	17.6
Conventional hydropower	7.2	9.8	9.3	4.0	6.7	8.8	7.8	4.2	5.3	8.9	7.8	4.0	30.3	27.6	26.1
Nonhydro renewables (d)	15.4	23.3	23.1	16.5	17.9	26.4	25.8	18.5	19.5	27.0	27.3	19.7	78.3	88.7	93.4
Other energy sources (e)	-0.3	-0.1	-0.3	-0.5	-0.5	-0.3	-0.5	-0.6	-0.6	-0.4	-0.5	-0.8	-1.2	-1.9	-2.3
Net energy for load (f)	57.7	60.7	79.1	63.4	58.3	62.5	78.5	63.4	61.4	66.4	82.6	64.6	261.0	262.6	275.0

(a) Generation from utility-scale (larger than 1 megawatt) solar photovoltaic and solar thermal power plants. Excludes generation from small-scale solar photovoltaic systems (see Table 7a).

(b) Residual fuel oil, distillate fuel oil, petroleum coke, and other petroleum liquids.

(c) Batteries, chemicals, hydrogen, pitch, purchased steam, sulfur, nonrenewable waste, and miscellaneous technologies.

(d) Wind, large-scale solar, biomass, and geothermal

(e) Pumped storage hydroelectric, petroleum, other fossil gases, batteries, and other nonrenewable fuels. See notes (b) and (c).

(f) Includes regional generation from generating units operated by electric power sector, plus energy receipts from neighboring U.S. balancing authorities outside region minus energy deliveries to neighboring balancing authorities.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

The electric power sector includes utility-scale generating power plants (total capacity is larger than 1 megawatt) operated by electric utilities and independent power producers whose primary business is to sell electricity over the transmission grid for consumption by the public.

Sources:

Table 7e. U.S. Electricity Generating Capacity (gigawatts at end of period)
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Electric power sector (power plants larger than one megawatt)															
Fossil fuel energy sources															
Natural gas	489.7	488.0	488.7	489.1	489.1	489.6	490.9	490.7	491.7	493.1	493.3	493.0	489.1	490.7	493.0
Coal	175.0	173.7	173.4	171.8	171.1	168.4	166.6	163.7	163.7	163.3	163.3	160.9	171.8	163.7	160.9
Petroleum	27.2	27.1	27.1	27.1	27.1	26.1	26.2	25.7	25.7	25.7	25.7	25.7	27.1	25.7	25.7
Other fossil gases	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Renewable energy sources															
Wind	148.1	149.3	150.5	152.0	153.7	155.2	156.3	159.4	160.0	163.9	164.6	168.5	152.0	159.4	168.5
Solar photovoltaic	96.5	103.1	107.7	121.2	127.9	135.5	140.7	149.6	155.5	162.8	168.5	183.0	121.2	149.6	183.0
Solar thermal	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Geothermal	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7
Waste biomass	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7	2.7
Wood biomass	2.3	2.3	2.3	2.2	2.2	2.2	2.2	2.2	2.2	2.2	2.2	2.2	2.2	2.2	2.2
Conventional hydroelectric	79.6	79.6	79.6	79.6	79.6	79.6	79.6	79.7	79.7	79.7	79.7	79.7	79.6	79.7	79.7
Pumped storage hydroelectric	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2	23.2
Nuclear	96.5	97.6	97.6	97.7	97.7	97.7	97.7	97.7	98.5	98.5	98.5	98.5	97.7	97.7	98.5
Battery storage	17.0	20.1	22.9	26.7	28.4	35.1	40.4	46.1	49.1	55.2	57.8	64.9	26.7	46.1	64.9
Other nonrenewable sources (a)	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Industrial and commercial sectors (combined heat and power plants larger than one megawatt)															
Fossil fuel energy sources															
Natural gas	18.7	18.6	18.6	18.4	18.4	18.4	18.4	18.5	18.5	18.5	18.5	18.5	18.4	18.5	18.5
Coal	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Petroleum	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
Other fossil gases	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Renewable energy sources															
Wood biomass	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3
Waste biomass	1.4	1.4	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3
Solar	0.7	0.7	0.7	0.7	0.7	0.8	0.8	1.0	1.0	1.0	1.0	1.0	0.7	1.0	1.0
Wind	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Geothermal	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Conventional hydroelectric	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Battery storage	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.3	0.3	0.3	0.3	0.1	0.2	0.3
Other nonrenewable sources (a)	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3
Small-scale solar photovoltaic capacity (systems smaller than one megawatt)															
All sectors total	49.2	50.5	52.1	53.3	55.7	57.0	58.7	60.5	62.2	64.0	65.8	67.6	53.3	60.5	67.6
Residential sector	33.6	34.4	35.5	36.5	37.9	38.9	40.1	41.3	42.5	43.7	44.9	46.1	36.5	41.3	46.1
Commercial sector	13.0	13.5	13.9	14.1	14.9	15.2	15.7	16.2	16.7	17.2	17.7	18.2	14.1	16.2	18.2
Industrial sector	2.6	2.6	2.7	2.7	2.9	2.9	3.0	3.1	3.1	3.2	3.2	3.3	2.7	3.1	3.3

(a) Other sources include hydrogen, pitch, chemicals, sulfur, purchased steam, nonrenewable waste, and miscellaneous technologies.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Capacity values represent the amount of generating capacity that is operating (or expected to be operating) at the end of each period.
factors.

Sources:

Historical data: Utility-scale capacity (power plants larger than one megawatt): EIA-860 Annual Survey and EIA-860M Preliminary Monthly Electric Generator Inventory, April 2025.

Small-scale solar capacity (systems smaller than one megawatt): Form EIA-861M Monthly Electric Power Industry Report.

Historical capacity data may differ from other EIA publications due to frequent updates to the Preliminary Monthly Electric Generator Inventory.

Table 8. U.S. Renewable Energy Consumption (quadrillion Btu)
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
All Sectors	2.085	2.229	2.138	2.125	2.131	2.309	2.231	2.213	2.278	2.506	2.364	2.297	8.577	8.884	9.445
Biodiesel, renewable diesel, and other (g)	0.177	0.193	0.203	0.192	0.132	0.147	0.172	0.184	0.168	0.195	0.201	0.196	0.765	0.634	0.759
Biofuel losses and co-products (d)	0.209	0.204	0.218	0.223	0.213	0.213	0.213	0.218	0.212	0.212	0.212	0.219	0.854	0.857	0.855
Ethanol (f)	0.279	0.294	0.304	0.303	0.281	0.301	0.298	0.296	0.276	0.298	0.298	0.297	1.180	1.175	1.169
Geothermal	0.030	0.029	0.029	0.029	0.030	0.029	0.030	0.029	0.030	0.028	0.030	0.030	0.117	0.117	0.117
Hydroelectric power (a)	0.223	0.216	0.202	0.186	0.213	0.229	0.204	0.195	0.232	0.264	0.217	0.197	0.826	0.842	0.910
Solar (b)(f)	0.202	0.329	0.338	0.230	0.265	0.418	0.427	0.277	0.314	0.489	0.498	0.323	1.098	1.387	1.624
Waste biomass (c)	0.098	0.093	0.093	0.095	0.094	0.093	0.094	0.095	0.093	0.093	0.095	0.095	0.379	0.376	0.377
Wood biomass	0.451	0.448	0.459	0.454	0.447	0.455	0.490	0.490	0.482	0.476	0.496	0.491	1.811	1.882	1.945
Wind	0.416	0.424	0.292	0.414	0.456	0.424	0.304	0.429	0.471	0.451	0.318	0.449	1.546	1.613	1.689
Electric power sector	0.863	0.952	0.822	0.846	0.948	1.042	0.917	0.913	1.021	1.163	1.003	0.971	3.482	3.819	4.157
Geothermal	0.014	0.013	0.013	0.013	0.014	0.013	0.014	0.014	0.014	0.012	0.014	0.014	0.053	0.054	0.054
Hydroelectric power (a)	0.222	0.214	0.201	0.185	0.212	0.228	0.203	0.195	0.231	0.262	0.216	0.196	0.822	0.838	0.906
Solar (b)	0.129	0.223	0.233	0.157	0.186	0.301	0.310	0.197	0.226	0.361	0.370	0.235	0.741	0.995	1.192
Waste biomass (c)	0.040	0.038	0.040	0.038	0.038	0.038	0.040	0.039	0.038	0.038	0.040	0.039	0.156	0.154	0.154
Wood biomass	0.041	0.040	0.043	0.039	0.042	0.038	0.046	0.039	0.041	0.038	0.044	0.038	0.162	0.165	0.161
Wind	0.416	0.424	0.292	0.414	0.456	0.424	0.304	0.429	0.471	0.451	0.318	0.449	1.546	1.613	1.689
Industrial sector (e)	0.563	0.555	0.573	0.579	0.560	0.574	0.599	0.610	0.595	0.594	0.605	0.615	2.271	2.343	2.409
Biofuel losses and co-products (d)	0.209	0.204	0.218	0.223	0.213	0.213	0.213	0.218	0.212	0.212	0.212	0.219	0.854	0.857	0.855
Geothermal	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.004	0.004	0.004
Hydroelectric power (a)	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.003	0.003	0.003
Solar (b)	0.004	0.005	0.005	0.004	0.004	0.006	0.006	0.004	0.004	0.006	0.006	0.004	0.018	0.020	0.021
Waste biomass (c)	0.040	0.038	0.036	0.039	0.039	0.038	0.037	0.039	0.039	0.038	0.038	0.039	0.153	0.154	0.154
Wood biomass	0.304	0.301	0.308	0.307	0.298	0.310	0.335	0.343	0.333	0.331	0.343	0.345	1.219	1.286	1.352
Commercial sector (e)	0.063	0.070	0.071	0.063	0.064	0.073	0.075	0.066	0.067	0.077	0.078	0.068	0.268	0.278	0.292
Geothermal	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.005	0.020	0.020	0.020
Solar (b)	0.016	0.023	0.024	0.016	0.018	0.026	0.027	0.019	0.021	0.030	0.031	0.021	0.079	0.089	0.103
Waste biomass (c)	0.018	0.017	0.017	0.017	0.017	0.017	0.017	0.017	0.017	0.017	0.017	0.017	0.069	0.068	0.068
Wood biomass	0.018	0.018	0.018	0.018	0.018	0.017	0.018	0.018	0.018	0.018	0.018	0.018	0.072	0.072	0.072
Residential sector	0.152	0.176	0.176	0.153	0.158	0.184	0.184	0.157	0.162	0.191	0.191	0.162	0.658	0.682	0.706
Geothermal	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.010	0.040	0.039	0.039
Solar (f)	0.053	0.077	0.076	0.053	0.058	0.085	0.084	0.057	0.062	0.092	0.091	0.062	0.260	0.283	0.307
Wood biomass	0.089	0.089	0.090	0.090	0.090	0.089	0.090	0.090	0.090	0.089	0.090	0.090	0.358	0.359	0.359
Transportation sector	0.445	0.476	0.495	0.483	0.401	0.436	0.457	0.467	0.433	0.481	0.487	0.481	1.898	1.762	1.881
Biodiesel, renewable diesel, and other (g)	0.177	0.193	0.203	0.192	0.132	0.147	0.172	0.184	0.168	0.195	0.201	0.196	0.765	0.634	0.759
Ethanol (g)	0.267	0.282	0.292	0.291	0.269	0.289	0.286	0.284	0.265	0.286	0.286	0.285	1.133	1.128	1.122

(a) Energy consumption for conventional hydroelectric power only. Hydroelectricity generated by pumped storage is not included in renewable energy.

(b) Solar energy consumption by utility-scale power plants (capacity greater than or equal to 1 megawatt) in the electric power, commercial, and industrial sectors and energy consumption by small-scale solar photovoltaic systems (less than 1 megawatts in size).

(c) Municipal solid waste from biogenic sources, landfill gas, sludge waste, agricultural byproducts, and other biomass.

(d) Losses and co-products from the production of fuel ethanol and biomass-based diesel

(e) Subtotals for the industrial and commercial sectors might not equal the sum of the components. The subtotal for the industrial sector includes ethanol consumption that is not shown separately. The subtotal for the commercial sector includes ethanol and hydroelectric consumption that are not shown separately.

(f) Solar consumption in the residential sector includes energy from small-scale solar photovoltaic systems (<1 megawatt), and it includes solar heating consumption in all sectors.

(g) Fuel ethanol and biodiesel, renewable diesel, and other biofuels consumption in the transportation sector includes production, stock change, and imports less exports.

Some biomass-based diesel may be consumed in the residential sector in heating oil.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Sources:

Monthly Energy Review, and Petroleum Supply Monthly.

Minor discrepancies with published historical data are due to independent rounding and possible revisions not yet reflected in the STEO.

Forecasts: EIA Short-Term Integrated Forecasting System.

Table 9a. U.S. Macroeconomic Indicators and CO₂ Emissions

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Macroeconomic															
Real Gross Domestic Product (billion chained 2017 dollars - SAAR)	23,054	23,224	23,400	23,542	23,528	23,595	23,654	23,765	23,890	24,031	24,157	24,270	23,305	23,636	24,087
Real Personal Consumption Expend. (billion chained 2017 dollars - SAAR)	15,857	15,967	16,113	16,273	16,321	16,421	16,433	16,482	16,549	16,623	16,701	16,778	16,053	16,414	16,662
Real Private Fixed Investment (billion chained 2017 dollars - SAAR)	4,231	4,256	4,278	4,266	4,346	4,320	4,270	4,270	4,264	4,275	4,285	4,298	4,258	4,301	4,281
Business Inventory Change (billion chained 2017 dollars - SAAR)	21	97	76	14	210	-108	34	80	100	133	151	163	52	54	137
Real Government Expenditures (billion chained 2017 dollars - SAAR)	3,888	3,917	3,966	3,996	3,989	3,983	3,977	3,970	3,972	3,974	3,974	3,972	3,942	3,980	3,973
Real Exports of Goods & Services (billion chained 2017 dollars - SAAR)	2,572	2,578	2,638	2,637	2,653	2,623	2,593	2,598	2,627	2,667	2,713	2,751	2,606	2,617	2,689
Real Imports of Goods & Services (billion chained 2017 dollars - SAAR)	3,549	3,614	3,707	3,690	4,032	3,663	3,642	3,594	3,559	3,560	3,572	3,590	3,640	3,733	3,570
Real Disposable Personal Income (billion chained 2017 dollars - SAAR)	17,452	17,497	17,506	17,614	17,741	17,924	17,837	17,882	18,239	18,389	18,513	18,652	17,517	17,846	18,448
Non-Farm Employment (millions)	157.3	157.8	158.1	158.6	159.2	159.6	159.8	159.9	159.9	160.0	160.2	160.4	158.0	159.6	160.1
Civilian Unemployment Rate (percent)	3.8	4.0	4.2	4.1	4.1	4.2	4.4	4.5	4.6	4.6	4.6	4.6	4.0	4.3	4.6
Housing Starts (millions - SAAR)	1.42	1.34	1.34	1.39	1.40	1.37	1.40	1.39	1.36	1.35	1.34	1.34	1.37	1.39	1.35
Industrial Production Indices (Index, 2017=100)															
Total Industrial Production	102.2	102.9	102.7	102.4	103.7	103.7	103.3	103.0	102.8	102.8	103.1	103.4	102.6	103.5	103.0
Manufacturing	99.5	99.8	99.6	99.3	100.4	100.7	100.3	100.1	100.0	100.1	100.6	100.9	99.5	100.4	100.4
Food	101.8	102.2	101.9	102.3	103.2	102.5	103.2	103.6	103.9	104.2	104.5	104.9	102.0	103.1	104.4
Paper	86.6	86.7	87.1	87.3	86.0	85.4	85.9	86.0	86.1	86.3	86.6	86.8	86.9	85.8	86.5
Petroleum and coal products	93.0	92.4	93.3	94.8	93.2	92.1	92.3	91.9	91.4	91.1	90.8	90.6	93.4	92.4	91.0
Chemicals	103.0	104.9	106.6	108.4	109.7	110.0	110.5	110.5	110.5	110.7	111.1	111.5	105.7	110.2	110.9
Nonmetallic mineral products	100.7	99.8	100.4	101.5	103.2	102.4	102.1	101.4	100.6	99.8	99.4	99.2	100.6	102.3	99.8
Primary metals	93.7	93.5	93.7	92.4	94.1	93.9	94.3	93.6	93.1	93.4	94.2	95.1	93.3	94.0	93.9
Coal-weighted manufacturing (a)	94.4	94.3	94.6	95.4	96.0	95.5	95.5	94.9	94.2	94.0	94.1	94.3	94.7	95.5	94.2
Distillate-weighted manufacturing (a)	96.7	96.6	96.7	97.3	98.3	98.1	98.0	97.6	97.1	97.0	97.0	97.2	96.8	98.0	97.1
Electricity-weighted manufacturing (a)	96.3	96.7	96.4	96.8	97.6	97.6	97.4	96.9	96.5	96.5	96.8	97.1	96.5	97.4	96.7
Natural Gas-weighted manufacturing (a)	93.9	94.7	94.6	96.1	96.5	96.1	96.0	95.3	94.7	94.5	94.5	94.7	94.8	96.0	94.6
Price Indexes															
Consumer Price Index (all urban consumers) (index, 1982-1984=1.00)	3.11	3.13	3.14	3.17	3.19	3.21	3.24	3.26	3.28	3.29	3.31	3.33	3.14	3.23	3.30
Producer Price Index: All Commodities (index, 1982=1.00)	2.55	2.54	2.54	2.55	2.60	2.55	2.56	2.59	2.59	2.59	2.60	2.60	2.55	2.57	2.59
Producer Price Index: Petroleum (index, 1982=1.00)	2.79	2.84	2.67	2.43	2.47	2.38	2.22	2.13	2.08	2.11	2.14	2.04	2.68	2.30	2.09
GDP Implicit Price Deflator (index, 2017=100)	124.2	124.9	125.5	126.3	127.4	128.8	130.3	131.4	132.2	132.7	133.3	134.0	125.2	129.5	133.0
Miscellaneous															
Vehicle Miles Traveled (a) (million miles/day)	8,374	9,327	9,305	8,829	8,514	9,373	9,398	8,814	8,476	9,425	9,411	8,852	8,959	9,026	9,043
Raw Steel Production (million short tons per day)	22.216	22.362	22.716	21.620	21.341	22.586	23.912	23.127	22.465	22.870	23.928	23.481	88.913	90.967	92.744
Carbon Dioxide (CO₂) Emissions (million metric tons)															
Total Energy (c)	1,243	1,116	1,212	1,205	1,309	1,110	1,209	1,209	1,251	1,101	1,212	1,211	4,777	4,836	4,775
Petroleum	543	561	565	562	554	562	568	563	546	559	564	560	2,231	2,247	2,229
Natural gas	514	387	426	460	536	379	418	464	513	382	428	470	1,787	1,798	1,793
Coal	184	166	219	182	217	168	221	179	190	159	218	179	751	785	746

 (a) Fuel share weights of individual sector indices based on EIA *Manufacturing Energy Consumption Survey*.

(b) Total highway travel includes gasoline and diesel fuel vehicles.

(c) Includes electric power sector use of geothermal energy and non-biomass waste.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

SAAR = Seasonally-adjusted annual rate

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Sources:

Historical data: Latest data available from U.S. Department of Commerce, Bureau of Economic Analysis; Federal Reserve System, Statistical release G17; Federal Highway Administration; and Federal Aviation Administration.

Table 9b. U.S. Regional Macroeconomic Data

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Real Gross State Product (billion \$2017)															
New England	1,191	1,198	1,206	1,212	1,210	1,212	1,214	1,219	1,225	1,231	1,236	1,241	1,202	1,214	1,233
Middle Atlantic	3,292	3,319	3,341	3,364	3,368	3,380	3,388	3,404	3,420	3,437	3,453	3,468	3,329	3,385	3,444
E. N. Central	2,927	2,952	2,972	2,987	2,981	2,991	2,996	3,010	3,024	3,042	3,057	3,071	2,959	2,995	3,048
W. N. Central	1,389	1,399	1,404	1,412	1,409	1,414	1,418	1,425	1,434	1,443	1,451	1,458	1,401	1,417	1,446
S. Atlantic	4,281	4,315	4,349	4,379	4,379	4,382	4,387	4,400	4,422	4,448	4,472	4,494	4,331	4,387	4,459
E. S. Central	1,022	1,030	1,042	1,050	1,050	1,054	1,056	1,061	1,066	1,073	1,079	1,084	1,036	1,055	1,075
W. S. Central	2,753	2,772	2,800	2,824	2,825	2,838	2,850	2,867	2,884	2,902	2,919	2,935	2,787	2,845	2,910
Mountain	1,607	1,619	1,632	1,643	1,642	1,650	1,656	1,666	1,677	1,689	1,699	1,709	1,625	1,654	1,694
Pacific	4,431	4,459	4,493	4,509	4,501	4,513	4,526	4,548	4,573	4,601	4,624	4,643	4,473	4,522	4,610
Industrial Output, Manufacturing (index, year 2017=100)															
New England	94.2	94.2	93.9	93.6	94.6	94.8	94.5	94.3	94.1	94.3	94.7	95.1	94.0	94.5	94.5
Middle Atlantic	94.6	94.9	94.9	94.6	95.8	95.9	95.6	95.4	95.2	95.2	95.5	95.7	94.7	95.7	95.4
E. N. Central	95.7	95.9	95.5	95.3	96.4	96.7	96.1	95.8	95.5	95.8	96.1	96.3	95.6	96.3	95.9
W. N. Central	100.9	101.2	100.6	100.3	101.2	101.5	101.0	100.7	100.5	100.6	101.1	101.5	100.8	101.1	100.9
S. Atlantic	102.9	103.5	103.5	103.0	104.4	104.7	104.3	104.3	104.2	104.4	105.0	105.4	103.2	104.4	104.7
E. S. Central	100.3	100.8	100.7	100.9	102.4	102.7	102.1	101.9	101.7	102.1	102.6	102.9	100.7	102.3	102.3
W. S. Central	106.4	107.1	107.5	107.5	108.6	109.0	108.8	108.7	108.6	108.7	109.1	109.6	107.1	108.8	109.0
Mountain	111.0	111.6	111.2	111.7	113.5	113.8	113.6	113.4	113.3	113.6	114.2	114.7	111.4	113.6	113.9
Pacific	94.2	94.2	93.8	92.6	93.5	93.5	93.2	93.0	92.9	93.0	93.4	93.8	93.7	93.3	93.3
Real Personal Income (billion \$2017)															
New England	1,045	1,046	1,046	1,053	1,058	1,068	1,063	1,064	1,072	1,080	1,085	1,092	1,048	1,063	1,082
Middle Atlantic	2,626	2,639	2,646	2,666	2,700	2,716	2,706	2,712	2,734	2,753	2,770	2,790	2,644	2,708	2,762
E. N. Central	2,730	2,736	2,733	2,751	2,774	2,805	2,791	2,797	2,820	2,841	2,858	2,878	2,738	2,792	2,849
W. N. Central	1,321	1,319	1,322	1,332	1,343	1,361	1,353	1,357	1,369	1,381	1,390	1,401	1,324	1,353	1,385
S. Atlantic	3,885	3,895	3,909	3,941	3,972	4,011	3,994	4,001	4,036	4,070	4,099	4,133	3,907	3,994	4,084
E. S. Central	1,044	1,049	1,052	1,061	1,069	1,082	1,078	1,081	1,092	1,100	1,107	1,116	1,051	1,078	1,104
W. S. Central	2,431	2,434	2,441	2,453	2,471	2,500	2,489	2,496	2,521	2,541	2,558	2,579	2,440	2,489	2,550
Mountain	1,501	1,506	1,505	1,516	1,528	1,546	1,540	1,545	1,560	1,575	1,587	1,601	1,507	1,540	1,581
Pacific	3,259	3,279	3,288	3,314	3,333	3,365	3,350	3,354	3,381	3,408	3,430	3,453	3,285	3,350	3,418
Households (thousands)															
New England	6,139	6,155	6,168	6,179	6,189	6,198	6,202	6,209	6,216	6,223	6,228	6,235	6,179	6,209	6,235
Middle Atlantic	16,247	16,293	16,326	16,358	16,389	16,410	16,418	16,434	16,451	16,462	16,471	16,480	16,358	16,434	16,480
E. N. Central	19,112	19,152	19,181	19,210	19,240	19,269	19,282	19,305	19,330	19,350	19,370	19,389	19,210	19,305	19,389
W. N. Central	8,778	8,800	8,817	8,836	8,856	8,875	8,886	8,902	8,920	8,936	8,951	8,966	8,836	8,902	8,966
S. Atlantic	27,665	27,770	27,854	27,943	28,028	28,104	28,153	28,218	28,287	28,352	28,417	28,489	27,943	28,218	28,489
E. S. Central	7,993	8,017	8,036	8,055	8,075	8,096	8,109	8,128	8,147	8,165	8,181	8,198	8,055	8,128	8,198
W. S. Central	16,167	16,223	16,274	16,325	16,374	16,420	16,451	16,491	16,536	16,576	16,618	16,660	16,325	16,491	16,660
Mountain	9,983	10,019	10,049	10,081	10,113	10,146	10,169	10,198	10,231	10,263	10,294	10,326	10,081	10,198	10,326
Pacific	19,230	19,278	19,315	19,349	19,384	19,417	19,432	19,459	19,488	19,510	19,535	19,557	19,349	19,459	19,557
Total Non-farm Employment (millions)															
New England	7.6	7.6	7.6	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.6	7.7	7.7
Middle Atlantic	20.3	20.4	20.5	20.5	20.6	20.7	20.7	20.7	20.7	20.7	20.7	20.7	20.4	20.7	20.7
E. N. Central	22.6	22.6	22.7	22.7	22.8	22.8	22.9	22.9	22.8	22.9	22.9	22.9	22.6	22.8	22.9
W. N. Central	11.0	11.1	11.1	11.1	11.1	11.1	11.2	11.2	11.2	11.2	11.2	11.2	11.1	11.2	11.2
S. Atlantic	31.2	31.4	31.5	31.5	31.7	31.8	31.8	31.8	31.8	31.8	31.9	31.9	31.4	31.8	31.8
E. S. Central	8.8	8.8	8.8	8.9	8.9	8.9	8.9	8.9	8.9	8.9	8.9	8.9	8.8	8.9	8.9
W. S. Central	19.2	19.3	19.3	19.4	19.5	19.6	19.6	19.6	19.7	19.7	19.7	19.8	19.3	19.6	19.7
Mountain	12.1	12.1	12.1	12.2	12.2	12.3	12.3	12.3	12.3	12.3	12.4	12.4	12.1	12.3	12.4
Pacific	24.6	24.6	24.6	24.7	24.8	24.8	24.9	24.9	24.9	24.9	24.9	25.0	24.6	24.8	24.9

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Regions refer to U.S. Census divisions.

 See "Census division" in EIA's Energy Glossary (<http://www.eia.gov/glossary/index.html>) for a list of States in each region.

Sources:

Historical data: Latest data available from U.S. Department of Commerce, Bureau of Economic Analysis; Federal Reserve System, Statistical release G17.

Table 9c. U.S. Regional Weather Data

U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Heating Degree Days															
United States average	1,904	413	50	1,321	2,102	438	72	1,430	1,960	464	73	1,424	3,689	4,042	3,920
New England	2,770	754	113	2,053	3,116	806	126	2,021	2,921	812	129	2,013	5,689	6,070	5,874
Middle Atlantic	2,520	566	71	1,860	2,864	643	83	1,848	2,698	648	85	1,841	5,017	5,438	5,271
E. N. Central	2,656	546	67	1,916	3,109	737	115	2,094	2,943	688	118	2,088	5,186	6,055	5,836
W. N. Central	2,839	598	88	2,050	3,274	672	148	2,312	3,112	693	151	2,307	5,576	6,406	6,263
South Atlantic	1,243	135	10	843	1,399	135	12	866	1,247	175	12	860	2,232	2,412	2,294
E. S. Central	1,662	169	11	1,043	1,836	178	19	1,205	1,653	228	19	1,199	2,884	3,239	3,099
W. S. Central	1,075	50	2	508	1,190	55	5	745	1,061	82	5	741	1,635	1,995	1,890
Mountain	2,243	694	101	1,637	2,228	632	148	1,829	2,152	704	152	1,826	4,675	4,836	4,833
Pacific	1,562	607	67	1,086	1,530	518	92	1,161	1,444	584	94	1,159	3,323	3,301	3,281
Heating Degree Days, Prior 10-year average															
United States average	2,103	483	58	1,444	2,048	476	55	1,422	2,023	475	58	1,440	4,088	4,001	3,996
New England	3,111	856	98	2,057	3,031	843	95	2,054	2,958	842	102	2,077	6,122	6,023	5,978
Middle Atlantic	2,889	685	63	1,878	2,798	672	61	1,868	2,727	675	65	1,899	5,516	5,399	5,366
E. N. Central	3,159	735	91	2,113	3,031	717	81	2,068	2,973	725	85	2,103	6,098	5,897	5,886
W. N. Central	3,295	729	120	2,303	3,193	714	111	2,256	3,182	716	116	2,291	6,447	6,274	6,305
South Atlantic	1,357	188	9	895	1,309	182	9	875	1,282	180	9	896	2,448	2,375	2,367
E. S. Central	1,756	248	14	1,205	1,695	242	13	1,168	1,665	241	14	1,201	3,224	3,119	3,120
W. S. Central	1,164	90	3	730	1,123	86	2	697	1,103	85	3	710	1,987	1,909	1,900
Mountain	2,210	697	128	1,801	2,222	696	123	1,789	2,255	689	126	1,785	4,837	4,830	4,854
Pacific	1,471	539	77	1,129	1,501	552	78	1,139	1,545	551	79	1,135	3,215	3,270	3,310
Cooling Degree Days															
United States average	54	496	942	141	53	461	938	106	51	451	979	107	1,633	1,559	1,589
New England	0	144	469	0	0	143	496	1	0	102	522	1	613	640	625
Middle Atlantic	0	241	613	7	0	218	628	5	0	186	668	5	861	851	858
E. N. Central	3	311	572	16	3	256	598	7	1	247	603	7	901	864	857
W. N. Central	11	331	673	31	11	293	713	11	5	298	734	11	1,046	1,028	1,048
South Atlantic	149	763	1,248	269	133	762	1,248	261	141	722	1,299	262	2,429	2,404	2,425
E. S. Central	40	620	1,104	107	39	575	1,096	68	34	548	1,133	68	1,871	1,777	1,783
W. S. Central	126	1,049	1,583	383	130	946	1,600	216	107	949	1,672	217	3,141	2,892	2,945
Mountain	9	487	1,081	128	23	435	999	84	21	461	1,041	85	1,705	1,541	1,608
Pacific	20	200	737	101	27	183	676	78	28	204	719	78	1,059	964	1,029
Cooling Degree Days, Prior 10-year average															
United States average	53	414	909	111	55	424	926	116	56	427	933	113	1,488	1,522	1,529
New England	0	83	482	2	0	90	495	2	0	97	496	2	567	587	595
Middle Atlantic	0	154	623	9	0	162	641	9	0	165	641	9	785	811	815
E. N. Central	1	231	566	10	1	239	586	11	2	242	596	11	808	837	851
W. N. Central	4	301	680	12	5	308	693	14	6	310	699	14	997	1,021	1,029
South Atlantic	153	674	1,212	271	157	686	1,231	278	157	686	1,240	271	2,310	2,353	2,354
E. S. Central	41	519	1,077	85	44	531	1,095	89	46	530	1,103	86	1,721	1,759	1,765
W. S. Central	109	872	1,585	228	118	899	1,599	244	126	909	1,602	239	2,793	2,860	2,875
Mountain	22	447	971	88	19	452	992	91	17	452	999	91	1,527	1,554	1,560
Pacific	32	202	678	88	30	199	682	87	27	195	683	83	1,000	999	989

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Regional degree days for each period are calculated by EIA as contemporaneous period population-weighted averages of state degree day data published by the National Oceanic and Atmospheric Administration (NOAA).

See *Change in Regional and U.S. Degree-Day Calculations* (http://www.eia.gov/forecasts/steo/special/pdf/2012_sp_04.pdf) for more information.

The approximate break between historical and forecast values is shown with historical data printed in bold; estimates and forecasts in italics.

Regions refer to U.S. Census divisions. See "Census division" in EIA's Energy Glossary (<http://www.eia.gov/tools/glossary/>) for a list of states in each region.**Sources:**

Table 10a. Drilling Productivity Metrics
U.S. Energy Information Administration | Short-Term Energy Outlook - July 2025

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Active rigs															
Appalachia region	42	39	35	34	35	-	-	-	-	-	-	-	37	-	-
Bakken region	34	34	35	35	34	-	-	-	-	-	-	-	34	-	-
Eagle Ford region	57	56	52	52	52	-	-	-	-	-	-	-	54	-	-
Haynesville region	43	36	35	33	31	-	-	-	-	-	-	-	37	-	-
Permian region	312	313	305	304	302	-	-	-	-	-	-	-	308	-	-
Rest of Lower 48 States, excluding GOA	104	96	96	105	112	-	-	-	-	-	-	-	100	-	-
New wells drilled															
Appalachia region	238	219	197	191	195	-	-	-	-	-	-	-	845	-	-
Bakken region	206	208	211	213	204	-	-	-	-	-	-	-	838	-	-
Eagle Ford region	294	300	294	308	313	-	-	-	-	-	-	-	1,196	-	-
Haynesville region	124	103	99	93	91	-	-	-	-	-	-	-	419	-	-
Permian region	1,397	1,402	1,380	1,390	1,403	-	-	-	-	-	-	-	5,569	-	-
Rest of Lower 48 States, excluding GOA	613	562	566	597	613	-	-	-	-	-	-	-	2,338	-	-
New wells drilled per rig															
Appalachia region	5.6	5.7	5.7	5.7	5.7	-	-	-	-	-	-	-	22.6	-	-
Bakken region	6.1	6.1	6.1	6.1	6.0	-	-	-	-	-	-	-	24.3	-	-
Eagle Ford region	5.1	5.4	5.7	6.0	6.1	-	-	-	-	-	-	-	22.1	-	-
Haynesville region	2.9	2.9	2.9	2.9	2.9	-	-	-	-	-	-	-	11.5	-	-
Permian region	4.5	4.5	4.5	4.6	4.6	-	-	-	-	-	-	-	18.1	-	-
Rest of Lower 48 States, excluding GOA	5.9	5.9	5.9	5.7	5.5	-	-	-	-	-	-	-	23.3	-	-
New wells completed															
Appalachia region	210	188	192	208	233	-	-	-	-	-	-	-	798	-	-
Bakken region	164	231	232	226	250	-	-	-	-	-	-	-	853	-	-
Eagle Ford region	398	378	373	297	395	-	-	-	-	-	-	-	1,446	-	-
Haynesville region	110	105	100	95	96	-	-	-	-	-	-	-	410	-	-
Permian region	1,493	1,515	1,530	1,461	1,420	-	-	-	-	-	-	-	5,999	-	-
Rest of Lower 48 States, excluding GOA	557	550	623	564	611	-	-	-	-	-	-	-	2,294	-	-
Cumulative drilled but uncompleted wells															
Appalachia region	764	794	799	781	742	-	-	-	-	-	-	-	781	-	-
Bakken region	413	389	367	354	306	-	-	-	-	-	-	-	354	-	-
Eagle Ford region	514	436	357	368	286	-	-	-	-	-	-	-	368	-	-
Haynesville region	737	734	733	729	723	-	-	-	-	-	-	-	729	-	-
Permian region	1,325	1,212	1,061	990	973	-	-	-	-	-	-	-	990	-	-
Rest of Lower 48 States, excluding GOA	2,282	2,293	2,235	2,269	2,273	-	-	-	-	-	-	-	2,269	-	-
Crude oil production from newly completed wells, one-year trend (thousand barrels per day) (a) (c)															
Appalachia region	12	13	15	15	15	-	-	-	-	-	-	-	14	-	-
Bakken region	54	56	63	64	61	-	-	-	-	-	-	-	59	-	-
Eagle Ford region	70	83	84	78	76	-	-	-	-	-	-	-	79	-	-
Haynesville region	0	0	0	0	0	-	-	-	-	-	-	-	0	-	-
Permian region	448	459	453	430	431	-	-	-	-	-	-	-	448	-	-
Rest of Lower 48 States, excluding GOA	79	78	85	84	80	-	-	-	-	-	-	-	82	-	-
Crude oil production from newly completed wells per rig, one-year trend (thousand barrels per day) (a)															
Appalachia region	0.3	0.3	0.4	0.4	0.4	-	-	-	-	-	-	-	0.4	-	-
Bakken region	1.6	1.6	1.8	1.9	1.7	-	-	-	-	-	-	-	1.7	-	-
Eagle Ford region	1.3	1.4	1.6	1.5	1.5	-	-	-	-	-	-	-	1.4	-	-
Haynesville region	0.0	0.0	0.0	0.0	0.0	-	-	-	-	-	-	-	0.0	-	-
Permian region	1.4	1.5	1.5	1.4	1.4	-	-	-	-	-	-	-	1.4	-	-
Rest of Lower 48 States, excluding GOA	0.7	0.8	0.9	0.8	0.8	-	-	-	-	-	-	-	0.8	-	-
Existing crude oil production change, one-year trend (thousand barrels per day) (a) (c)															
Appalachia region	-13.8	-14.2	-15.4	-15.3	-15.2	-	-	-	-	-	-	-	-14.7	-	-
Bakken region	-60.0	-59.4	-69.9	-69.1	-65.0	-	-	-	-	-	-	-	-64.6	-	-
Eagle Ford region	-66.7	-67.0	-77.0	-76.8	-76.0	-	-	-	-	-	-	-	-71.9	-	-
Haynesville region	-0.7	-0.6	-0.5	-0.4	-0.5	-	-	-	-	-	-	-	-0.5	-	-
Permian region	-419.4	-428.5	-414.2	-416.3	-431.1	-	-	-	-	-	-	-	-419.6	-	-
Rest of Lower 48 States, excluding GOA	-87.0	-82.3	-83.9	-84.6	-86.3	-	-	-	-	-	-	-	-84.4	-	-
Natural gas production from newly completed wells, one-year trend (million cubic feet per day) (a) (d)															
Appalachia region	1,043.3	926.9	928.5	913.3	907.2	-	-	-	-	-	-	-	952.8	-	-
Bakken region	59.1	62.3	70.5	69.4	64.1	-	-	-	-	-	-	-	65.1	-	-
Eagle Ford region	337.7	306.7	291.0	282.8	283.2	-	-	-	-	-	-	-	304.9	-	-
Haynesville region	576.3	458.8	400.4	393.7	392.9	-	-	-	-	-	-	-	457.0	-	-
Permian region	875.6	955.0	931.4	843.0	841.2	-	-	-	-	-	-	-	901.2	-	-
Rest of Lower 48 States, excluding GOA	329.7	281.9	303.2	356.9	367.9	-	-	-	-	-	-	-	318.0	-	-
Natural gas production from newly completed wells per rig, one-year trend (million cubic feet per day) (a) (d)															
Appalachia region	25.7	21.9	24.9	27.1	26.7	-	-	-	-	-	-	-	24.9	-	-
Bakken region	1.8	1.8	2.0	2.0	1.8	-	-	-	-	-	-	-	1.9	-	-
Eagle Ford region	6.1	5.4	5.4	5.4	5.6	-	-	-	-	-	-	-	5.6	-	-
Haynesville region	12.6	11.5	10.9	11.7	12.4	-	-	-	-	-	-	-	11.7	-	-
Permian region	2.8	3.0	3.0	2.8	2.8	-	-	-	-	-	-	-	2.9	-	-
Rest of Lower 48 States, excluding GOA	3.1	2.8	3.3	3.6	3.5	-	-	-	-	-	-	-	3.2	-	-
Existing natural gas production change, one-year trend (million cubic feet per day) (a) (c) (d)															
Appalachia region	-1,135.3	-1,047.2	-897.5	-971.2	-949.2	-	-	-	-	-	-	-	-1,012.4	-	-
Bakken region	-56.1	-32.0	-63.7	-72.9	-64.7	-	-	-	-	-	-	-	-56.3	-	-
Eagle Ford region	-339.5	-311.3	-276.2	-276.6	-289.1	-	-	-	-	-	-	-	-300.8	-	-
Haynesville region	-885.7	-763.7	-529.6	-483.3	-546.2	-	-	-	-	-	-	-	-664.7	-	-
Permian region	-698.4	-674.5	-613.7	-621.0	-669.5	-	-	-	-	-	-	-	-648.7	-	-
Rest of Lower 48 States, excluding GOA	-433.4	-371.2	-363.4	-374.8	-341.7	-	-	-	-	-	-	-	-385.6	-	-

(a) The Production From Newly Completed Wells and the Existing Production Change data series are reported as smoothed monthly data over a twelve-month period. The smoothing is done using the Locally Weighted Scatterplot Smoothing (LOWESS) function. LOWESS calculates a locally weighted average for each point, giving more weight to nearby monthly data and less weights to distant data. The smoothed data may change each month according to updated data.

(b) The most recent six months of well-level data is incomplete due to known lags in reporting. For these months, the values are imputed based on historical reporting patterns and other relevant factors.

(c) The sum of "Production from Newly Completed Wells" and "Existing Production Change" may not equal the month-over-month crude oil or natural gas production changes reported in tables 4a and 5a, respectively. This discrepancy arises from the statistical smoothing techniques applied to aggregated basin level data, variations in data imputation methodologies, and utilizing different data sources.

(d) Natural gas production in this table is marketed natural gas production.

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Latest data available from Baker Hughes, Enervus, FracFocus.org.

Table 10b. Crude Oil and Natural Gas Production from Shale and Tight Formations
U.S. Energy Information Administration | Short-Term Energy Outlook

	2024				2025				2026				Year		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2024	2025	2026
Total U.S. tight oil production (million barrels per day) (a)	8.67	8.91	8.98	9.14	8.89	9.12	-	-	-	-	-	-	8.93	-	-
Austin Chalk formation	0.12	0.13	0.13	0.13	0.11	0.12	-	-	-	-	-	-	0.13	-	-
Bakken formation	1.21	1.23	1.21	1.23	1.21	1.22	-	-	-	-	-	-	1.22	-	-
Eagle Ford formation	0.94	1.03	1.04	1.04	1.00	1.08	-	-	-	-	-	-	1.01	-	-
Mississippian formation	0.13	0.12	0.11	0.12	0.11	0.11	-	-	-	-	-	-	0.12	-	-
Niobrara Codell formation	0.46	0.45	0.45	0.50	0.46	0.47	-	-	-	-	-	-	0.47	-	-
Permian formations	5.42	5.54	5.60	5.68	5.57	5.69	-	-	-	-	-	-	5.56	-	-
Woodford formation	0.08	0.08	0.08	0.09	0.08	0.08	-	-	-	-	-	-	0.08	-	-
Other U.S. formations	0.31	0.33	0.35	0.35	0.34	0.35	-	-	-	-	-	-	0.33	-	-
Total U.S. shale dry natural gas production (billion cubic feet per day) (a)	83.9	82.2	83.2	84.0	85.0	86.4	-	-	-	-	-	-	83.4	-	-
Bakken formation	2.5	2.7	2.7	2.6	2.6	2.7	-	-	-	-	-	-	2.6	-	-
Barnett formation	1.7	1.6	1.6	1.7	1.6	1.6	-	-	-	-	-	-	1.7	-	-
Eagle Ford formation	4.3	4.4	4.3	4.3	4.1	4.2	-	-	-	-	-	-	4.3	-	-
Fayetteville formation	0.8	0.8	0.8	0.8	0.8	0.8	-	-	-	-	-	-	0.8	-	-
Haynesville formation	13.2	11.7	11.5	11.3	11.9	12.1	-	-	-	-	-	-	11.9	-	-
Marcellus formation	26.8	25.8	26.2	26.3	27.4	28.0	-	-	-	-	-	-	26.3	-	-
Mississippian formation	2.3	2.3	2.2	2.2	2.0	1.9	-	-	-	-	-	-	2.2	-	-
Niobrara Codell formation	2.7	2.7	2.8	2.8	2.8	2.8	-	-	-	-	-	-	2.8	-	-
Permian formations	17.7	18.5	19.3	19.8	19.6	20.1	-	-	-	-	-	-	18.8	-	-
Utica formation	6.5	6.6	6.5	6.8	6.8	6.6	-	-	-	-	-	-	6.6	-	-
Woodford formation	2.5	2.6	2.5	2.4	2.4	2.5	-	-	-	-	-	-	2.5	-	-
Other U.S. formations	2.8	2.7	2.7	2.9	3.1	3.1	-	-	-	-	-	-	2.8	-	-

(a) These production estimates are based on geologic formations, not geographic regions

Notes:

EIA completed modeling and analysis for this report on July 2, 2025.

- = no data available

The approximate break between historical and forecast values is shown with historical data with no shading; estimates and forecasts are shaded gray.

Minor discrepancies with published historical data are due to independent rounding.

Sources:

Historical data: Latest data available from Enverus state administrative data.