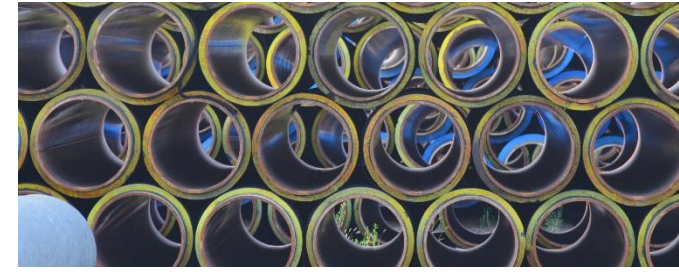




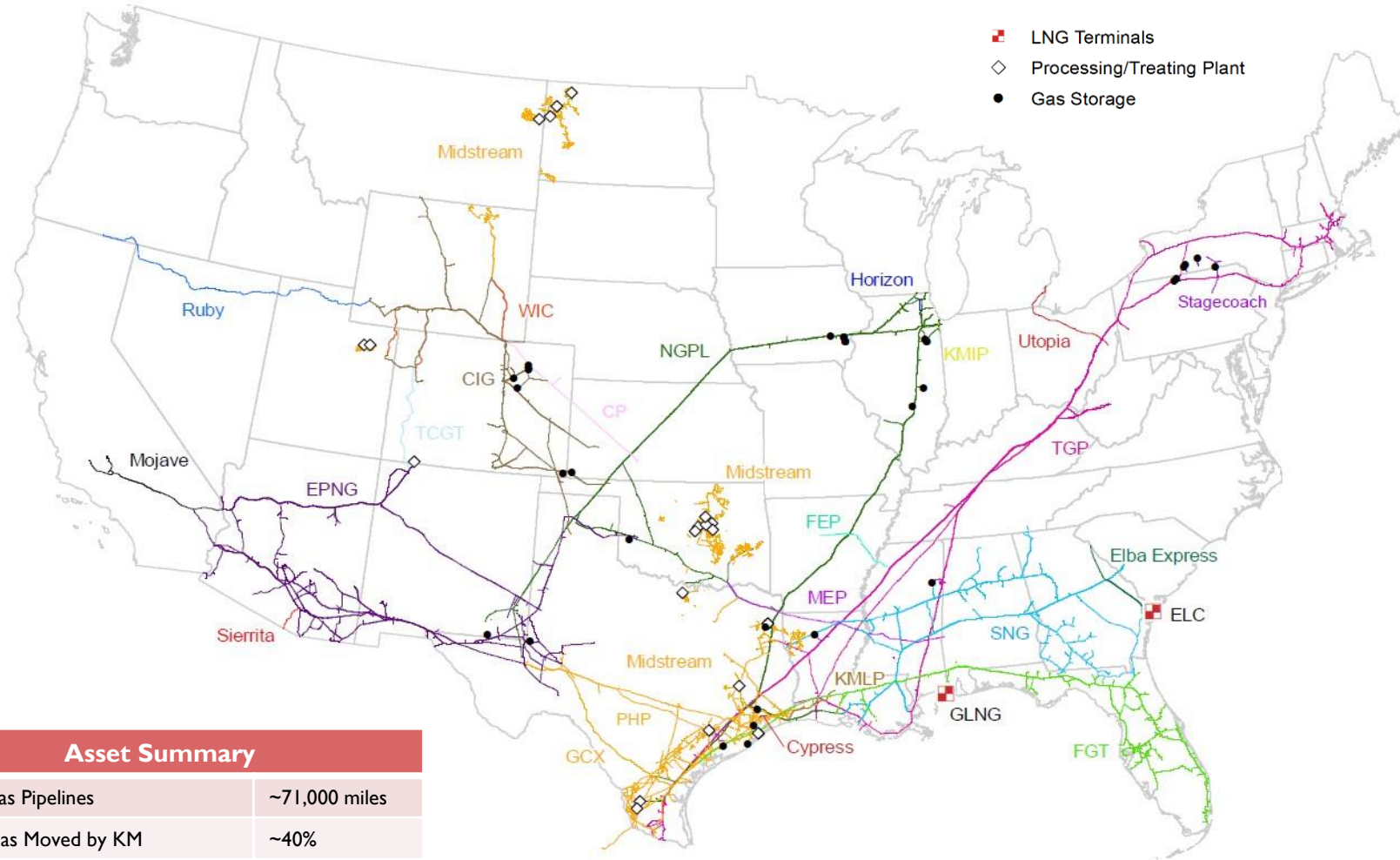
Delivering Energy to Improve Lives

2024 NGA Pre-Winter Briefing Meeting

Jim McCord – Tennessee Gas Pipeline/Kinder Morgan



KINDER MORGAN NATURAL GAS SEGMENT



Asset Summary	
Natural Gas Pipelines	~71,000 miles
US Nat. Gas Moved by KM	~40%
Working Gas Storage Capacity	700 Bcf

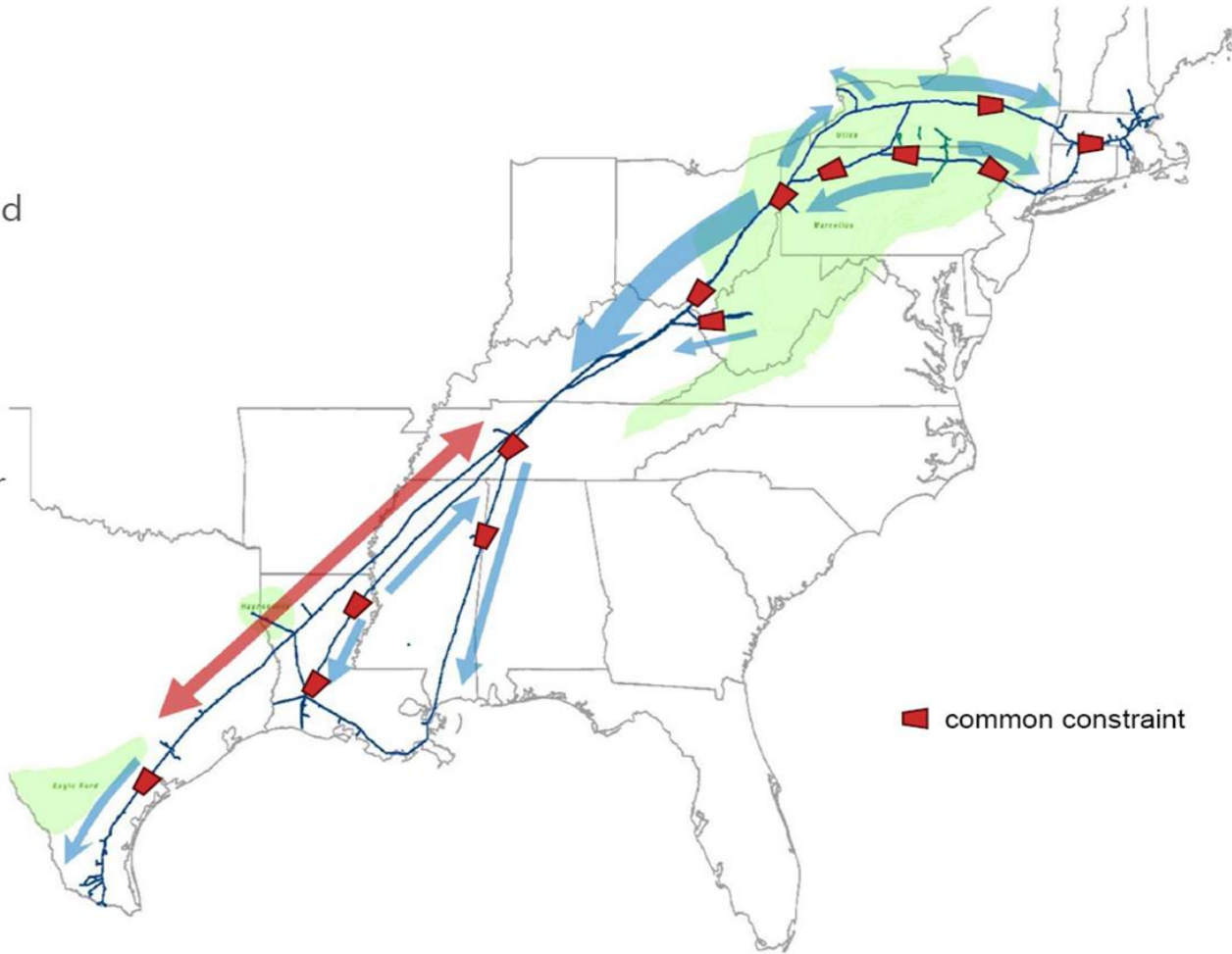
Tennessee Gas Pipeline System Flows

Remains the same

- High utilization moving gas from Marcellus/Utica, both South and East
- Traditional bottleneck into New England remains
- Steady exports to Canada

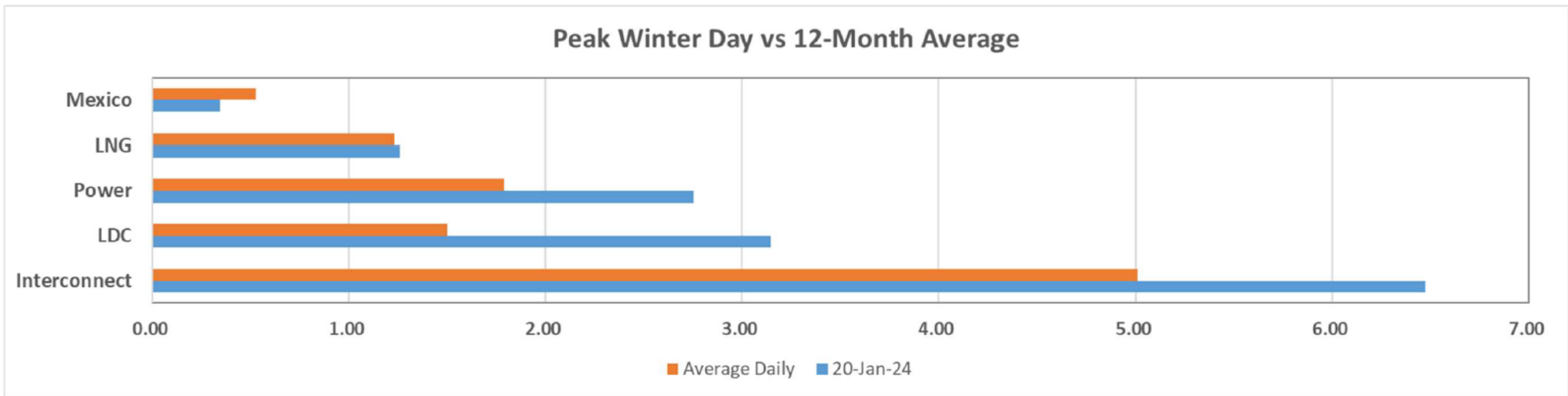
Recent Trends

- Power growth – PJM, SERC in particular
- Growing LNG exports
- Texas becoming a swing market



- System Considerations for Winter
 - More gas moving toward the Northeast
 - OFO East of STA 245 and 325 for over-takes and under-deliveries
 - Scheduled maintenance coming to an end
 - Work with customers as operations allow
 - Storage Utilization
 - Protect firm storage
 - Daily system flexibility to manage *scheduled* payback
 - Gas control and Scheduling evaluate payback each cycle to determine availability
 - TGP encourages customers to nominate payback in an effort to minimize customer cashout exposure

- 2023/2024 was similar to prior winter – overall a mild winter System-wide throughput virtually flat year over year averaging ~11.0 MMDth/d for November – March period
- Winter Peak was ~13.71 MMDth on January 20, 2024; 0.7 MMDth greater than prior winter peak
- Power Demand Peak was ~2.95 MMDth/d on January 17, 2024; 0.1 MMDth higher than prior winter peak
- Storage inventory over 70% full exiting winter (3/31) compared to 59% in 2023



Winter 2023-2024 Northeast Market Flows



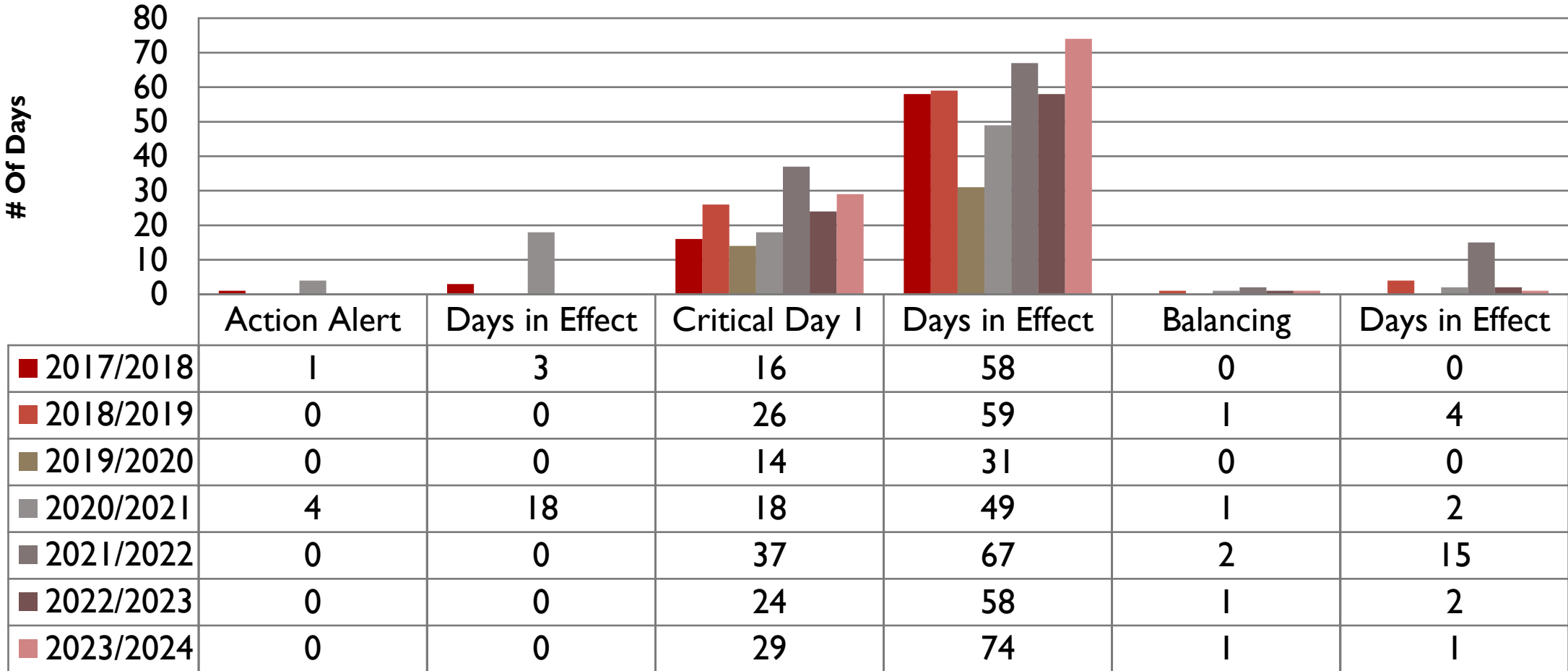
	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>Change</u>
LDC	1,729	1,610	1,666	+3%
Power	829	937	802	-16%
Pipeline Interconnects	3,209	3,152	3,231	+2%
TOTAL	5,767	5,699	5,699	

Zones 4, 5 and 6
Volumes are MDth/d

Winter Notices Requiring Customer Action



WINTER SEASON OFOS – ZONES 4, 5 AND 6



2024/2025 Operational Focus and Winter Readiness

Reliable Service – Continuous Integration of new Asset (Stagecoach), Utilize System Flexibility, Make Further Investments, Refresh Critical Spare Parts Inventory, Monitor & Measure Performance & Take Action to Improve Continuously

Quality Product & Services – Measurement Accuracy (L&U) & Gas Quality Monitoring, Technician Response

Scheduled Maintenance - Maintenance by November 1; Compressor Station protective devices, borescope inspections and water wash, Calibration/Testing, Test run units (as applicable), Pipeline and meter station maintenance, Annual Valve Maintenance, Auto-close checks, Regulator and RV devices

Winter Weather Preparation - Inspect & test emergency equipment (i.e., generators, heaters, snow handling equipment, etc.), Contingency planning, Place personnel at key compressor stations, Communicate & coordinate with local customers.

Gas Control Engagement - Daily Morning Call (area, division, system), Gas control to Gas control, Pre-winter meetings with NE customers

- Segments inspected: 23
- Tools launched and received: 62
- Completed 127 anomaly digs and 10 DA projects
- 60+ Digs scheduled for 2025
- 23 Segment inspections planned for 2025

- We continue to look for innovative ways to reduce customer impact
 - Dent fatigue life analysis
 - Foreign crossing review, etc.
 - Continued development of engineering analysis



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Thank you!

