



Delivering Energy to Improve Lives

2025 NGA Pre-Winter Briefing Meeting

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2025/2026 Operational Focus and Winter Readiness

Reliable Service – Continuous Integration of new Assets and Capacities, 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 (e.g., generators, heaters, snow handling equipment), Conduct Contingency planning, Place personnel at key compressor stations, and communicate and coordinate with local customers.

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

Inspection Metrics

- Segments Inspected: 31
- Tools Launched and Received: 82
- Completed 92 Anomaly Digs
- 8 Direct Assessment Projects
- 34+ Digs Scheduled for 2026
- 33 Segment Inspections Planned for 2026

Minimizing Customer Impact

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



- **Enhanced Winter Preparedness Measures**

Building on lessons from Winter 2024–2025, TGP is implementing targeted upgrades to compressor stations, valve automation, and cold-weather protocols to ensure uninterrupted service.

- **System Reliability and Capacity Optimization**

Continued investment in pipeline integrity and flow assurance tools will support peak-day delivery needs across constrained Northeast corridors.

- **Collaborative Meter Station Improvements**

Our commitment to customer satisfaction is evident in our collaborative approach. We are committed to modernizing metering infrastructure, improving data accuracy, and response times during high-demand periods.

- **Outage Planning and Real-Time Communication Enhancements**

Strengthening outage coordination protocols and expanding digital communication platforms to ensure timely updates and transparency with our transportation customers and point operators.

Weather Overview

- Winter 2024/2025 cooler than the prior year, especially December – February
- Overall, winter was mild vs. the 30-year average, but core months were near normal

Throughput & Demand

- System-wide throughput up ~0.4 MMDth/d year over year
- Average 11.4 MMDth/d (Nov-Mar)
- Peak Day 13.8 MMDth on January 21, 2025 (new record, +0.1 MMDth year over year)
 - LDC Demand: 3.4 MMDth/d
 - Power Demand: 3.3 MMDth/d

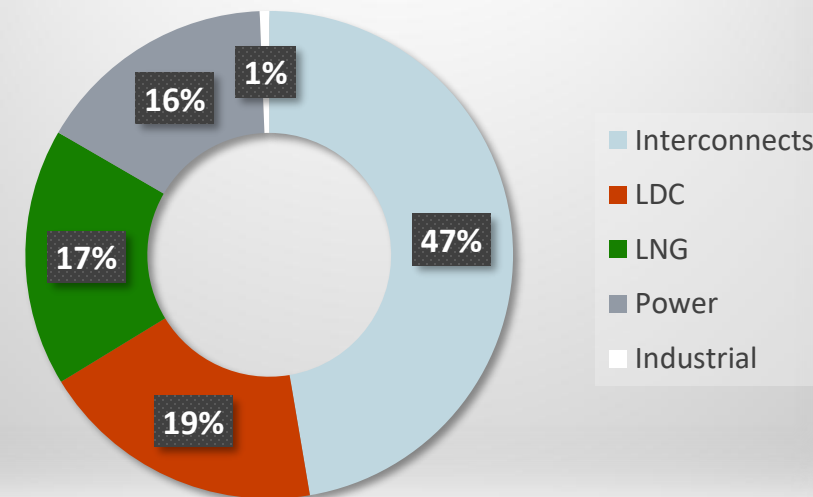
Storage Inventory

- ~40% full exiting winter (as of 3/31/25)
- Down from >70% same time in 2024

Winter Demand Breakdown (Avg Daily – 11.24 MMDth/d)

- Interconnects: 5.32
- LDC: 2.13
- LNG: 1.92
- Power: 1.80
- Industrial: 0.07

Winter Demand



Northeast winter demand last winter

The Northeast experienced **sharply higher-than-expected heating demand** due to prolonged cold spells, which pushed regional gas burn and spot prices above national averages despite ample national storage levels¹.

Outlook for this winter

Supply fundamentals look stronger with **record U.S. production and higher Canadian imports** expected to increase overall winter supply. However, Northeast-specific risks remain - pipeline constraints and regional storage deficits could still cause localized tightness and price volatility if temperatures are colder than normal^{2/3}.

¹Winter 2024 - Natural Gas Recap: How Did Prices Compare to the Past <https://www.competitive-energy.com/blog/winter-2024-natural-gas-recap-how-did-prices-compare-to-the-past-decade>

²Winter 2025/2026 Natural Gas Market Outlook. <https://www.ngsa.org/wp-content/uploads/sites/3/2025/09/NGSA-Winter-2025-2026-Natural-Gas-Market-Outlook-Executive-Summary.pdf>

³Winter Strip in Focus as Natural Gas Demand Seen Surging in Second Half <https://www.naturalgasintel.com/news/winter-strip-in-focus-as-natural-gas-demand-seen-surging-in-second-half-of-2025/>



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Thank you!

Questions??

