

Natural Gas in the Evolving Energy Landscape

Fall Operations Conference
October 2025

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Northeast Gas Association



The image features a red background with a series of concentric circles in varying shades of red, creating a tunnel-like effect. In the center, the words "The End" are written in a white, elegant script font. A small blue square is visible in the top-left corner, and a thin horizontal line is in the top-right corner.

The End

The Plan for Today's Presentation

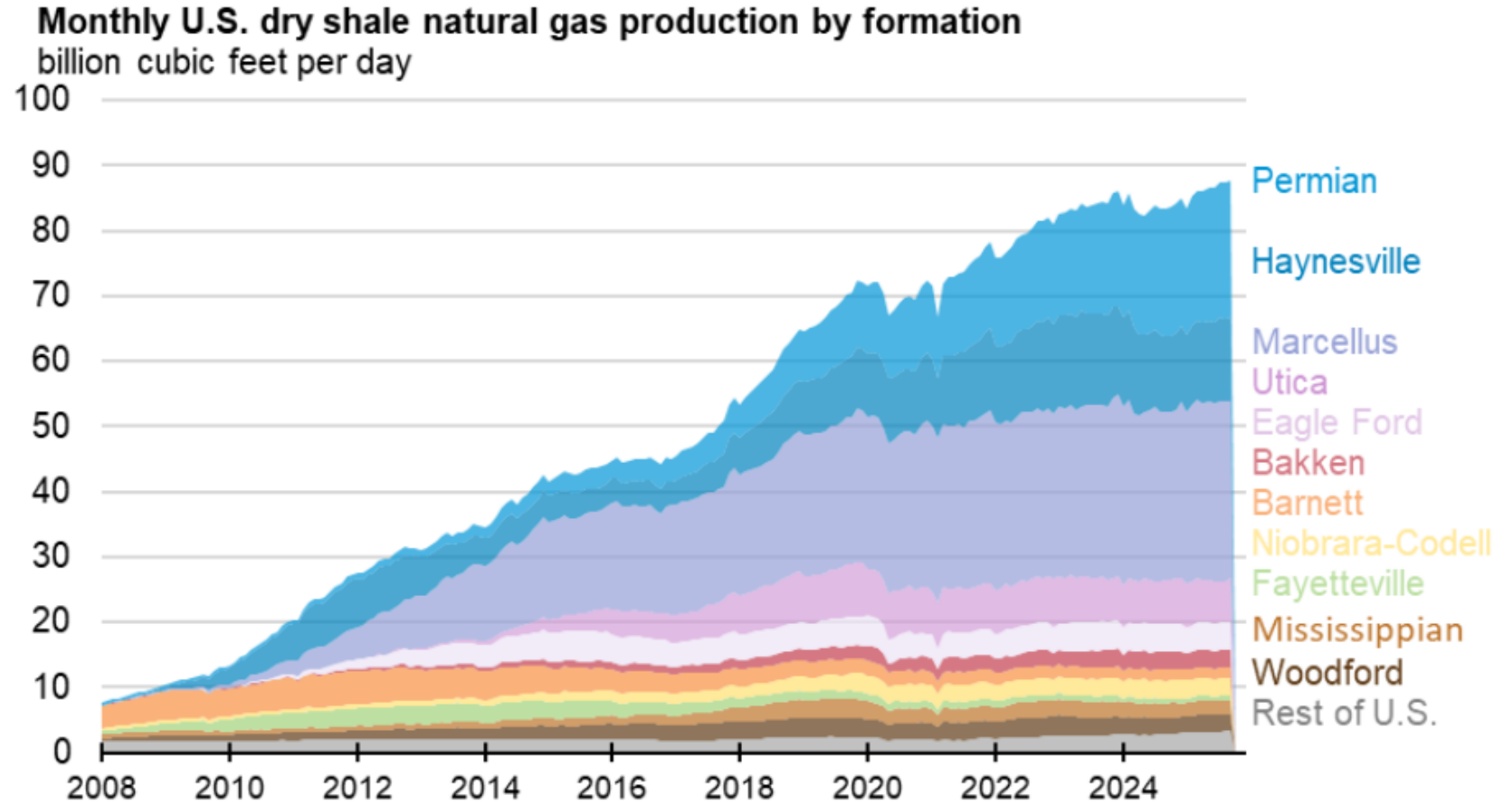
1. What role does natural gas play in the Northeast today?
2. What is the policy landscape?
3. What does the future realistically look like?

Supply Dynamics

Northeast Nature Gas
Infrastructure,
Supply, and Demand



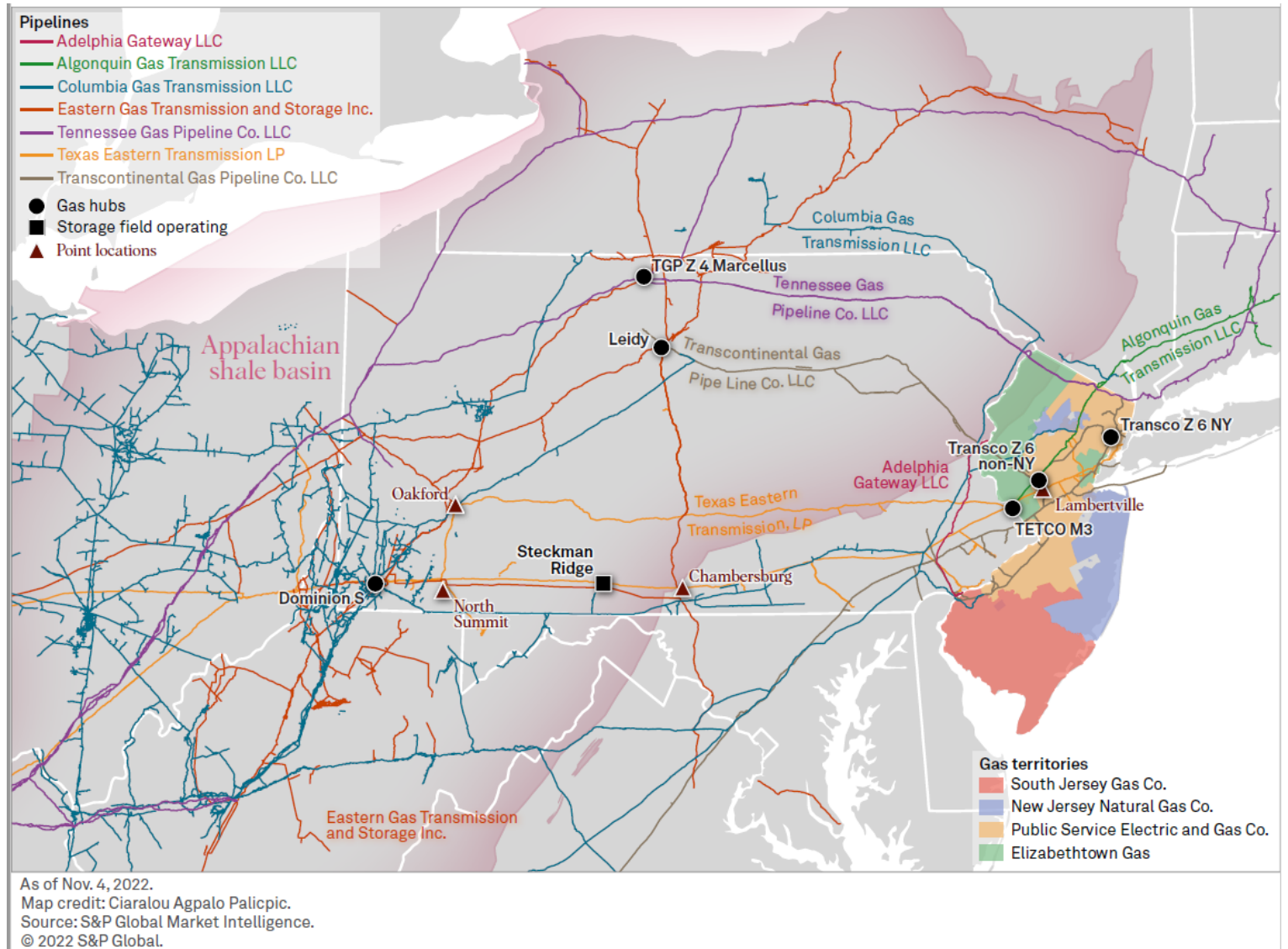
Shale Production Growth



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

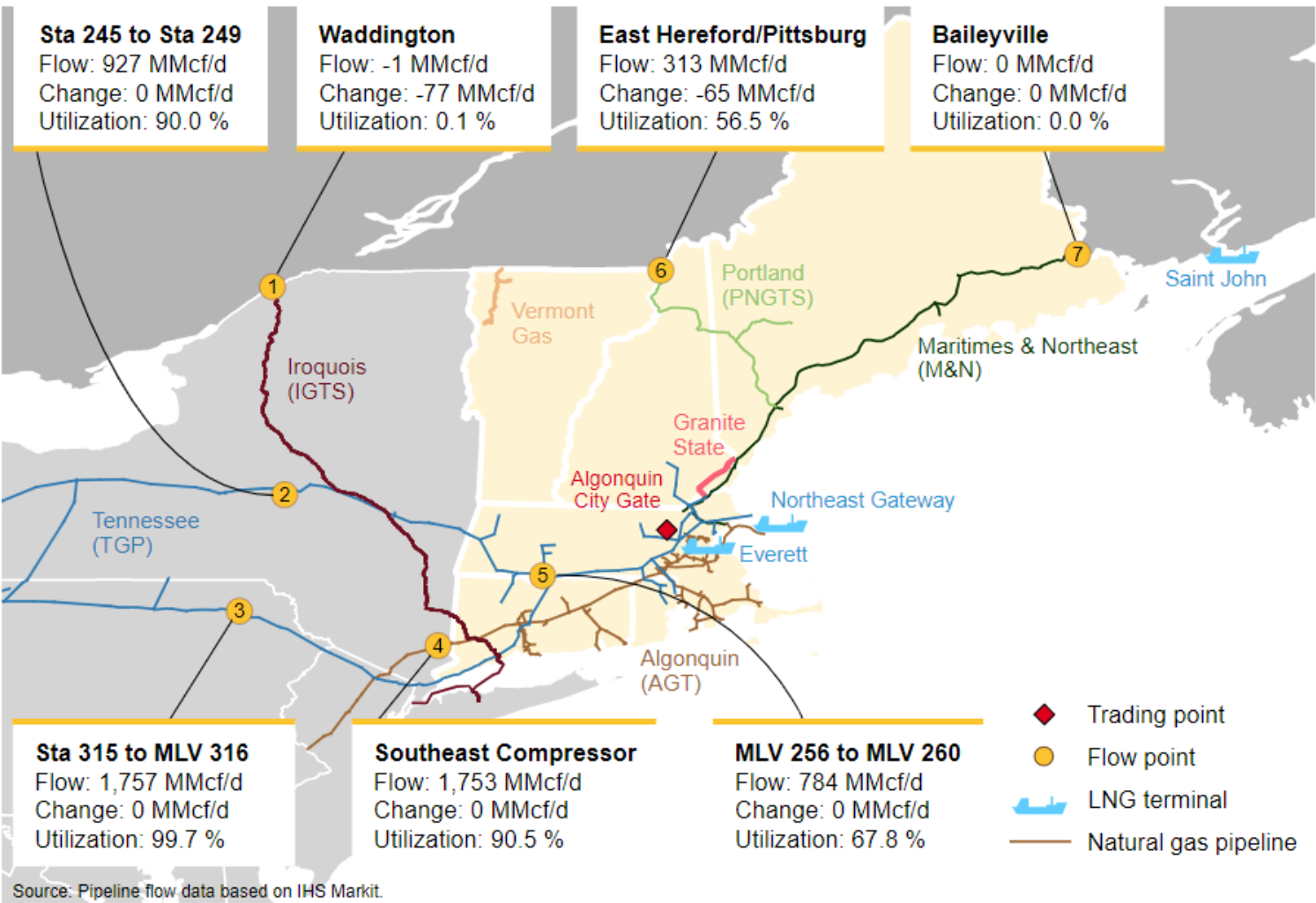


New Jersey, Pennsylvania & New York Regional Map



New York & New England Regional Map

New England natural gas infrastructure map



U.S. LNG Imports

LNG imports can be a key marginal source of supply during times of high demand. On peak demand days, imported LNG can contribute up to 35% of New England's natural gas supply.





News • Media Release

NPCC Northeast Gas/Electric System Study

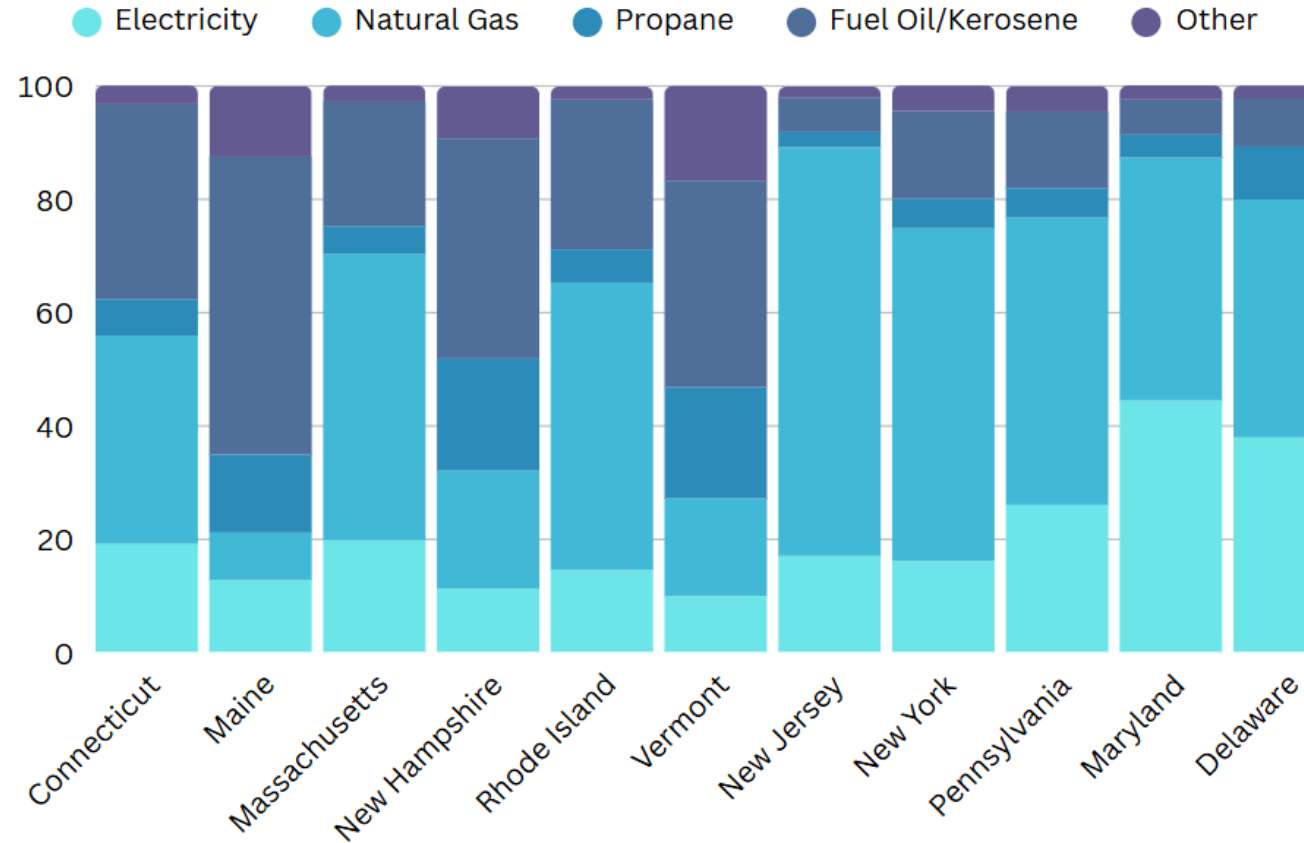
“..For high frequency and/or long duration constraints, one of the most economic mitigation measures, in lieu of adding backup fuel capability, may be the installation of additional pipeline capability...”

So, what is the end use of all this infrastructure?



The Northeast Gas Heating Market

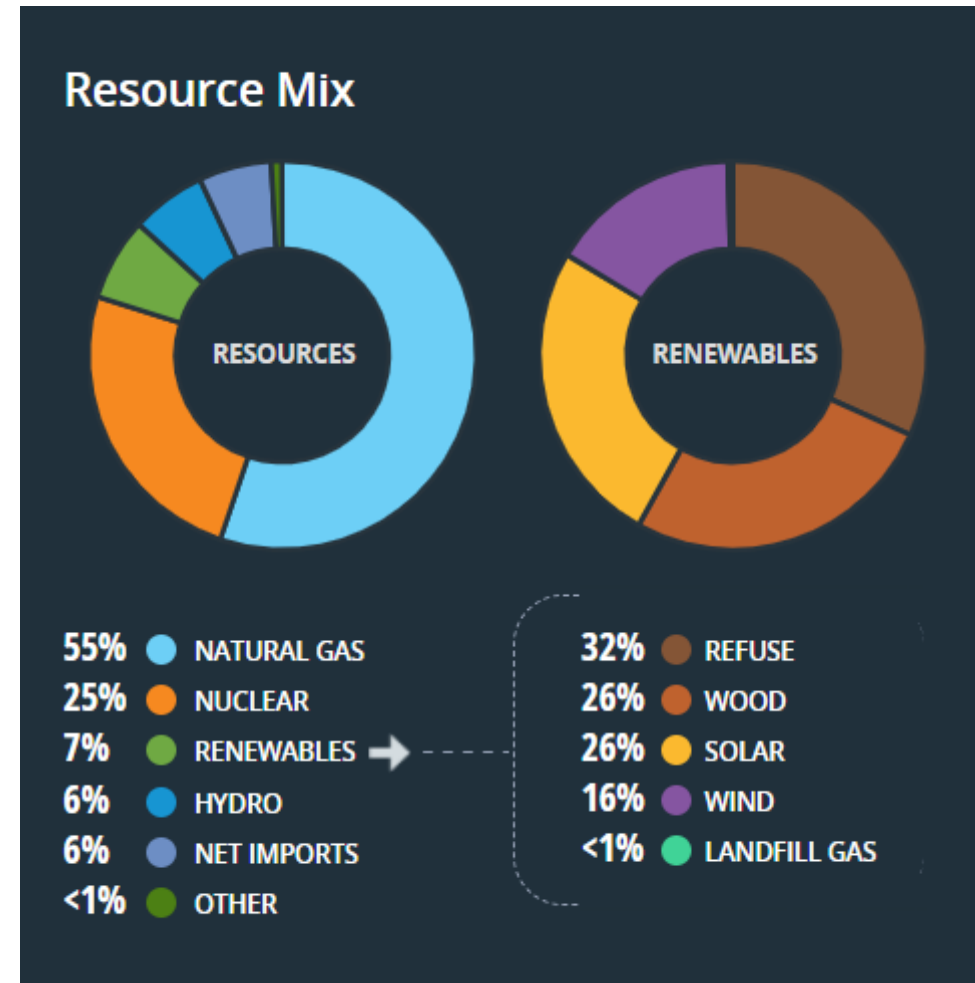
Heating Fuel Source By State (2023, EIA)



The Northeast Electric Market

New England Electric Generation by Fuel Source, 2023

- Natural Gas: 55%
- Nuclear: 23%
- Renewables: 12%
 - Wind: 4%
 - Refuse: 3%
 - Wood: 2%
 - Solar 4%
 - Landfill Gas: 0.45%
- Hydro: 10%
- Other: 5%
- Oil: 0.32%
- Coal: 0.2%



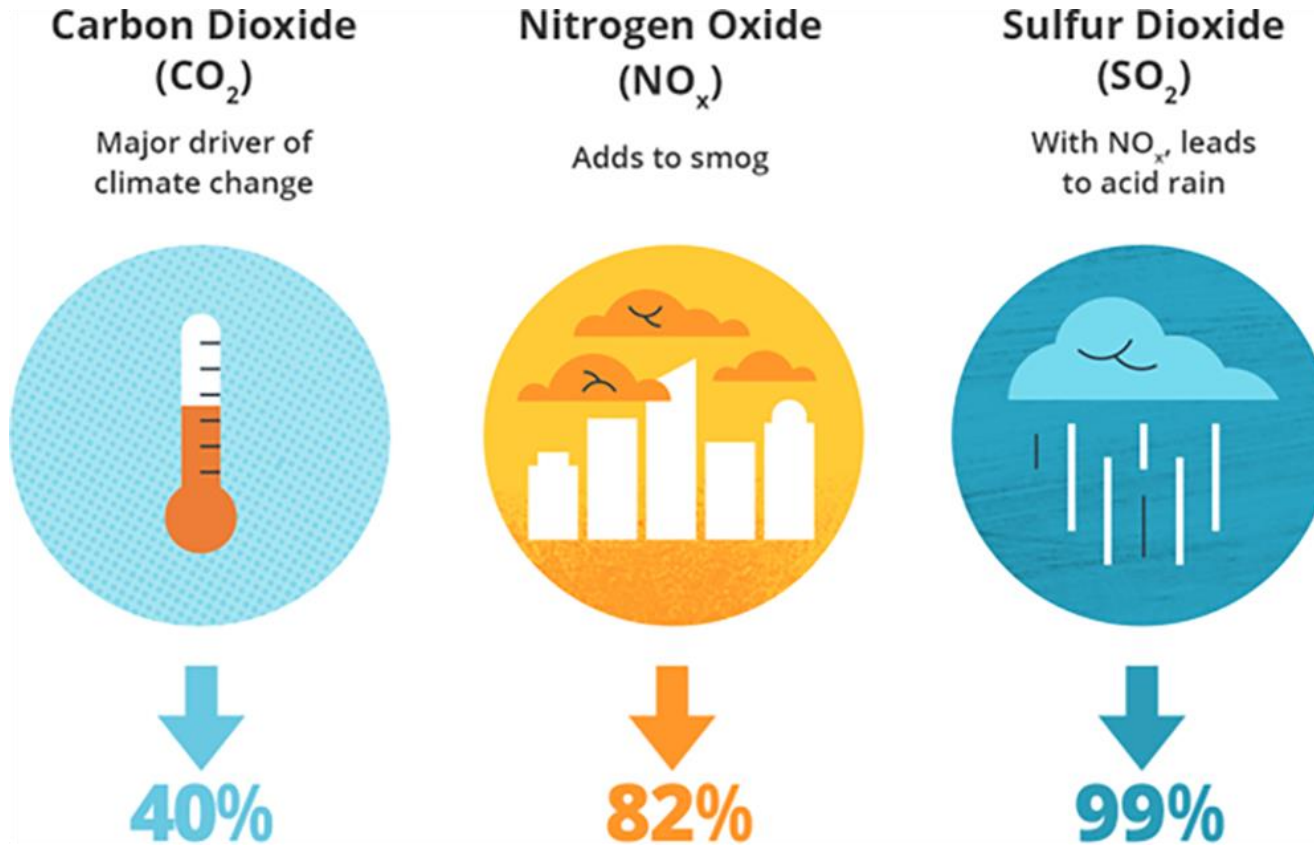
ISO-NE Resource Mix, Sept 8, 2025, 6:00PM

The Success Story

Emissions, Affordability,
Reliability



New England Generator Emissions – 2001 vs 2023



“The biggest contributor has been the region’s shift to lower-emitting, highly efficient natural-gas-fired generation.”

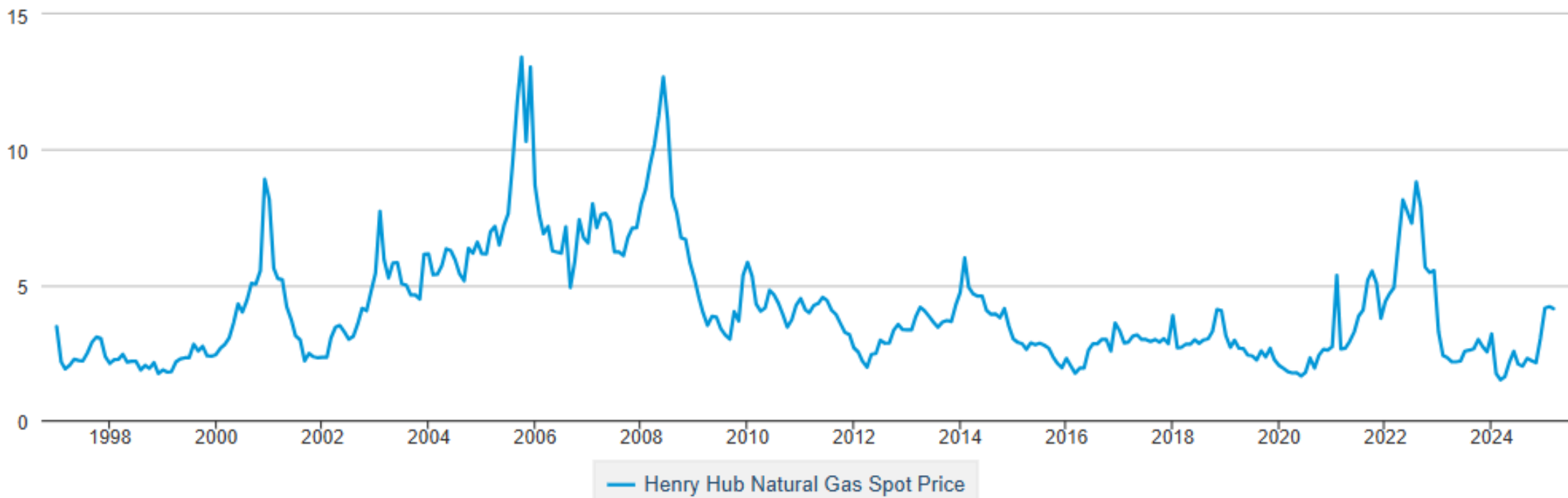
-ISO-New England

Natural Gas Prices

Henry Hub Natural Gas Spot Price

DOWNLOAD

Dollars per Million Btu

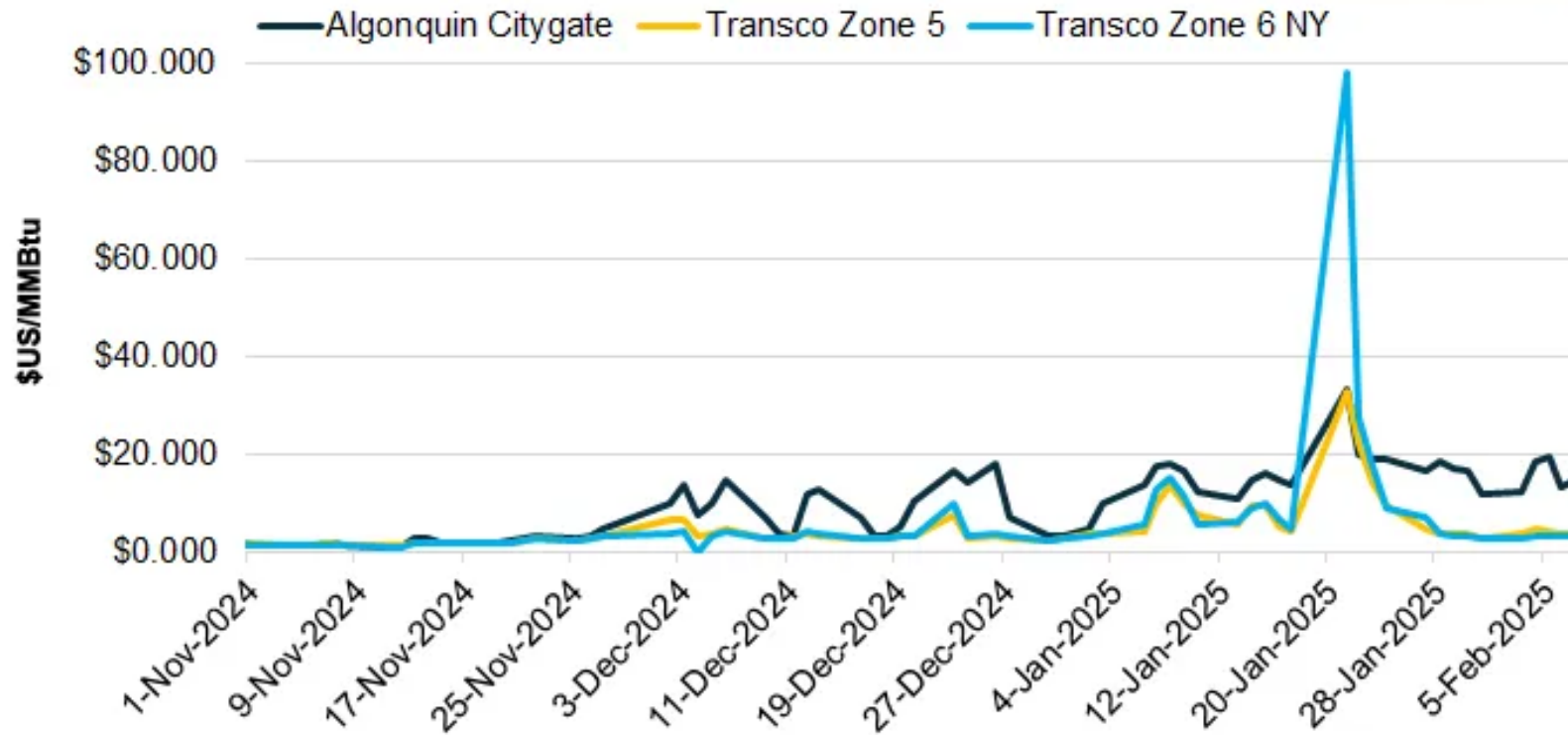


Data Source: Thomson Reuters <https://www.eia.gov/dnav/ng/hist/mgwhhdm.htm>

Natural Gas Prices (Northeast)

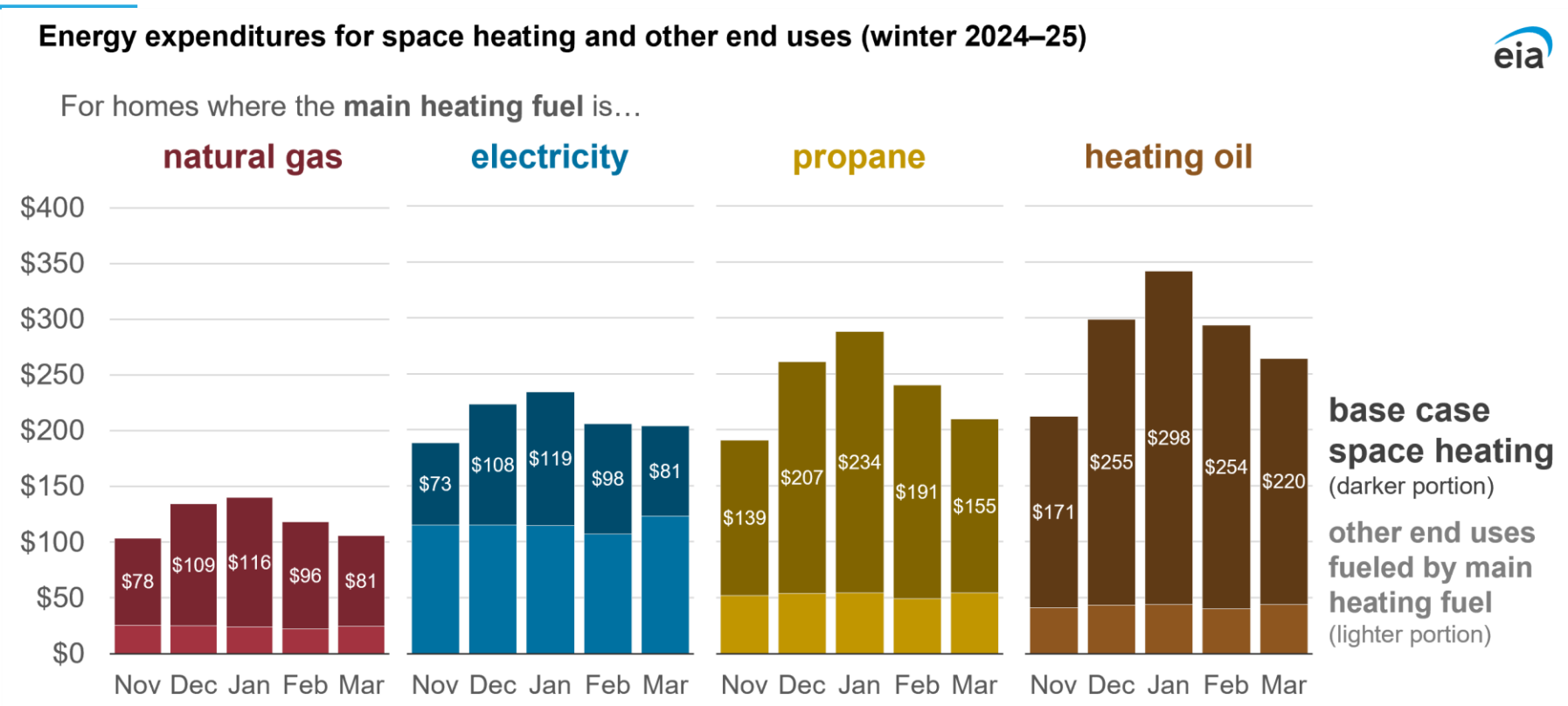
NGI's Algonquin Citygate, Transco Zone 5 & Transco Zone 6 NY Daily Natural Gas Prices

NGI



Source: NGI's Daily Gas Price Index

Natural Gas: Affordable Home Heating

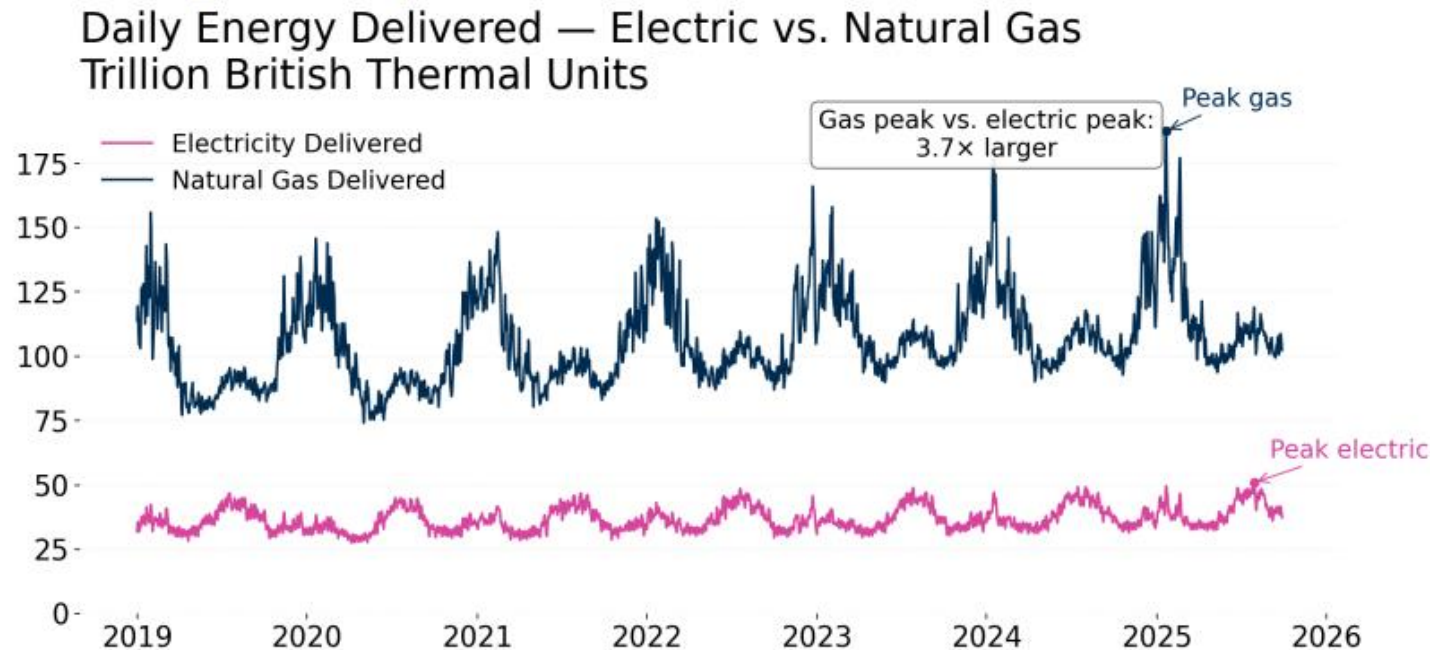


Economic Impacts

State	% customers save heating with natural gas (vs electric)	# of jobs supported by natural gas industry
Connecticut	48%	7,371
Maine	50%	570
Massachusetts	67%	14,932
New Hampshire	58%	873
Rhode Island	59%	2,126
Vermont	64%	267
New Jersey	62%	25,831
New York	65%	36,647
Pennsylvania	45%	53,553
Maryland	32%	7,718
Delaware	40%	449

Reliability - Meeting Peak Demand

Natural gas delivers nearly 4x more energy than the electric system on peak days



Source: AGA Winter Heating Outlook

Reliability

“NERC has long stated that natural gas is essential to the reliability of the grid during the electricity industry’s unprecedented transformation.”

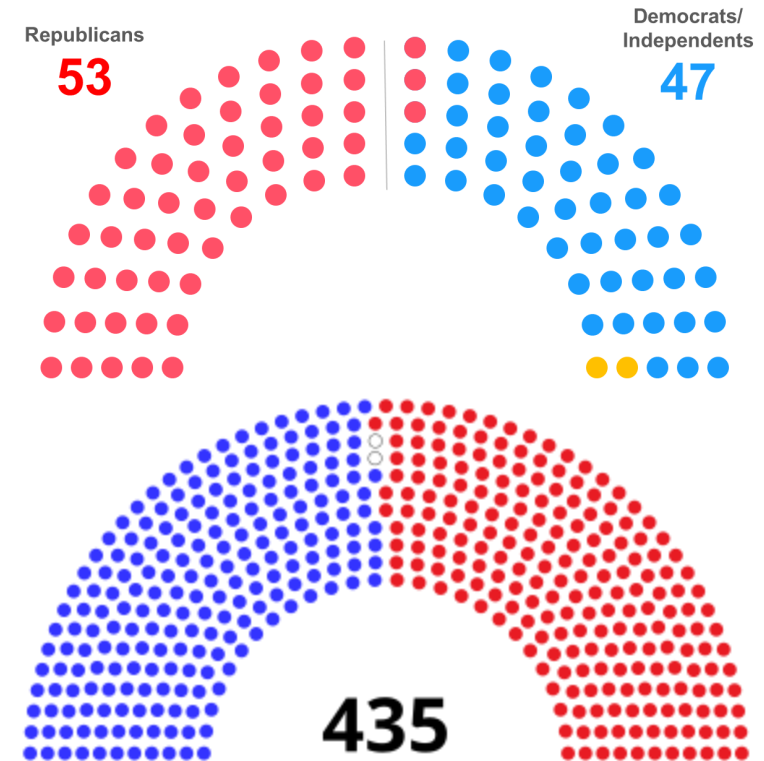
-North American Electric Reliability Council
9/6/2024

What is the policy landscape today

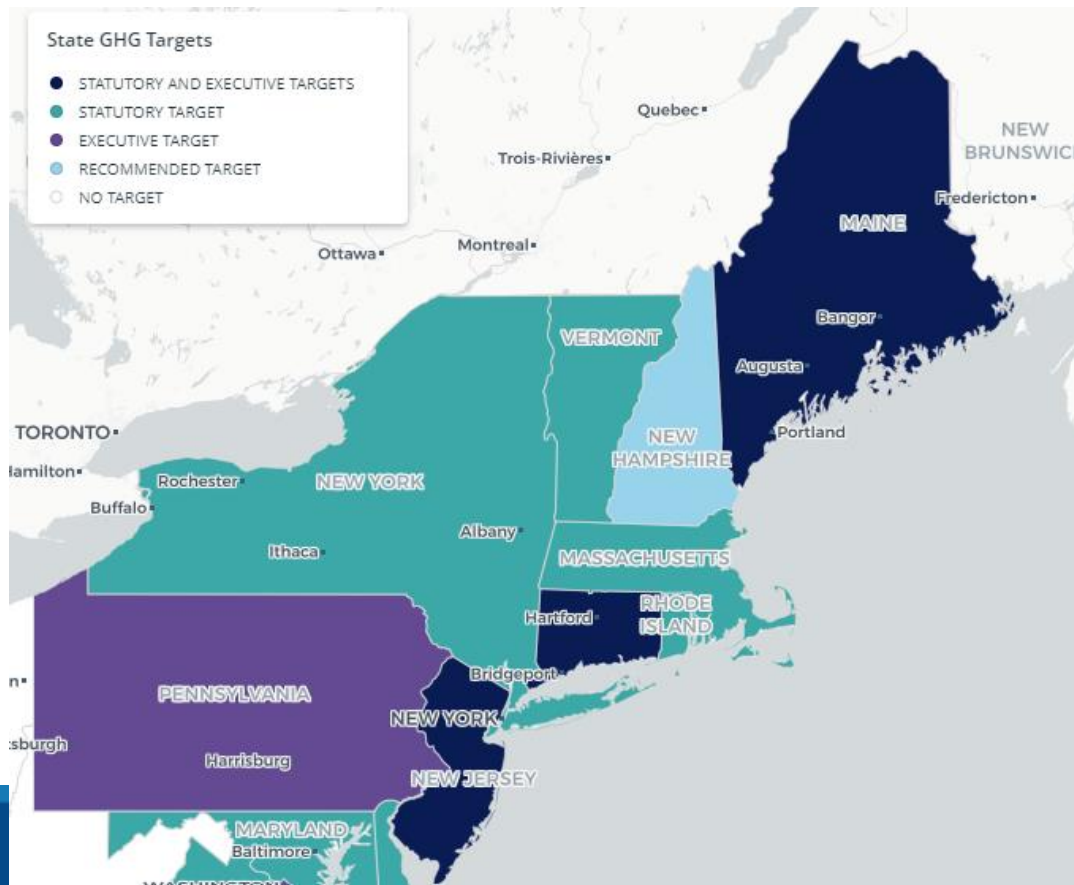
Federal and State Divide



What's Going on in Washington, DC?

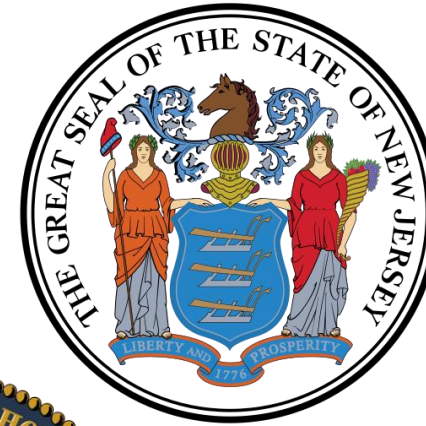
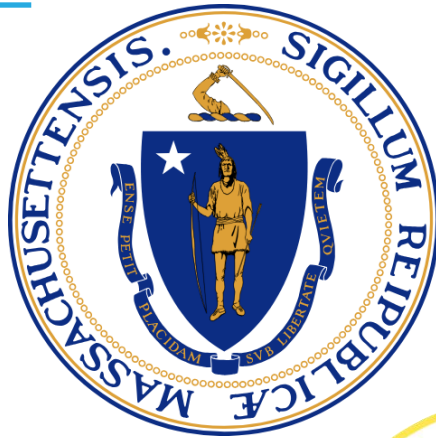


Climate Goals



All states in the region, **except for New Hampshire**, have announced economy-wide Net Zero targets that were established through legislation or executive declaration.

Future of Gas Proceedings



Other Regulatory Proceedings

LDCs must navigate myriad other regulatory requirements and structures, including:

- Pipeline Safety Rules
- OQ Rules
- Permitting rules
- Ratemakings
- Building Codes
- Clean Heat Standards
- “Affordability” actions



Legislative Action

NY CAPITOL NEWS

**NY HEAT Act reintroduced
in the NYS Senate**

NEWS & INSIGHTS

**State Climate Superfund
Laws Head to Court**



What does the future *realistically* look like?

Innovation, Infrastructure,
and Growth



What Are Utilities Doing on Emerging Fuels

Energy Efficiency

Geothermal

Renewable Natural Gas

Hydrogen

Hybrid Heating

Other Emerging Technologies



What is the Future for New Infrastructure?



Yet at the same time...

Trump pushes for pipeline approval as Hochul visits Washington for high-stakes meeting

by JESSICA A. BOTELHO | The National News Desk | Thu, March 13th 2025 at 8:18 PM



FILE - New York Gov. Kathy Hochul speaks during the Democratic National Convention in Chicago, Aug. 19, 2024. (AP Photo/Paul Sancya, File)

LATEST / NEWS • SEP 03, 2025

Healey backs natural gas transmission project

Sam Drysdale, State House News

Lamont doubles down on natural gas after signing two climate-related bills

Gov. hinted he'd been engaged in talks with Trump administration, NY state leaders about building or expanding pipelines

Gas Customer Growth

Residential Customer Additions by State in 2022 (Thousands)		
Rank	State	Additions
1	Texas	82.6
2	Ohio	51.8
3	California	47.8
4	Florida	35.9
5	New York	29.5
6	Arizona	28.0
7	Utah	27.3
8	New Jersey	26.2
9	South Carolina	25.5
10	Colorado	24.5
11	North Carolina	22.2
12	Minnesota	21.5
13	Washington	19.3
14	Indiana	18.7
15	Pennsylvania	16.8
16	Wisconsin	16.4
17	Nevada	13.7
18	Idaho	12.9
19	Virginia	11.9
20	Maryland	11.8

Residential Gas Customer Growth Change in Residential End Users

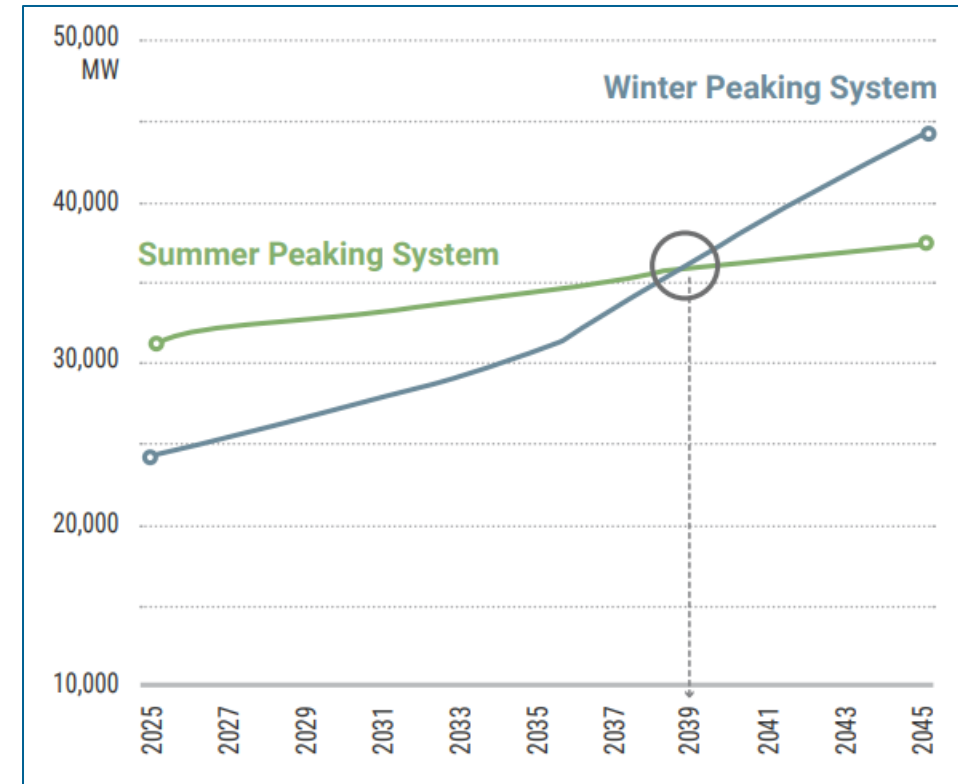
State	1 Year 2022-23	10 Year Average 2012-23
Connecticut	3,866	7,909
Delaware	2,663	4,356
Maine	385	1,121
Maryland	5,666	10,653
Massachusetts	12,118	13,564
New Hampshire	2,294	1,789
New Jersey	29,192	27,297
New York	12,016	21,414
Pennsylvania	4,497	19,305
Rhode Island	1,946	1,769
Vermont	590	823
Total U.S.	618,043	643,333

Source: EIA- 176 Survey

Energy Growth

“Demand Growth is now higher than at any point in the past two decades.”

NERC 2024 Long-Term Reliability Assessment



NY-ISO 2025 Power Trends –
Summer and Winter Peak Demand Forecasts

Energy Reliability

“New and expanded natural gas infrastructure is essential to help America avoid a grid reliability crisis.”

-Former FERC Chairman Mark Christie
June 18, 2025

“I think we need to build, build, build. America needs every electron and every molecule of every type we can get, and we need more infrastructure to move it.”

-FERC Chairman David Rosner
September 18, 2025



The End

The Pipeline

Welcome to The Pipeline, the New Home of NGA's Statistical Guide.

The Pipeline serves as NGA's digital repository of facts, figures, and trends that tell the story of the Northeast natural gas industry.



Connecticut



Delaware



Maine



Maryland



Massachusetts



New Hampshire



New Jersey



New York



Pennsylvania



Rhode Island



Vermont

