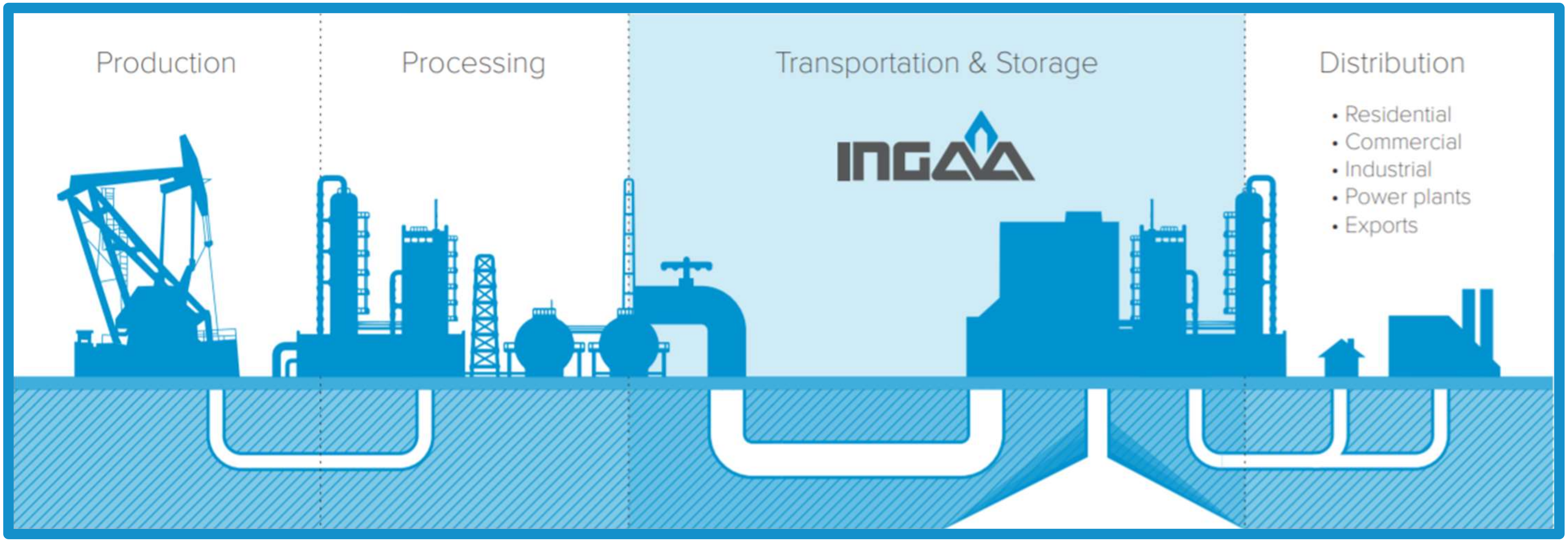
Amy Andryszak

President & CEO

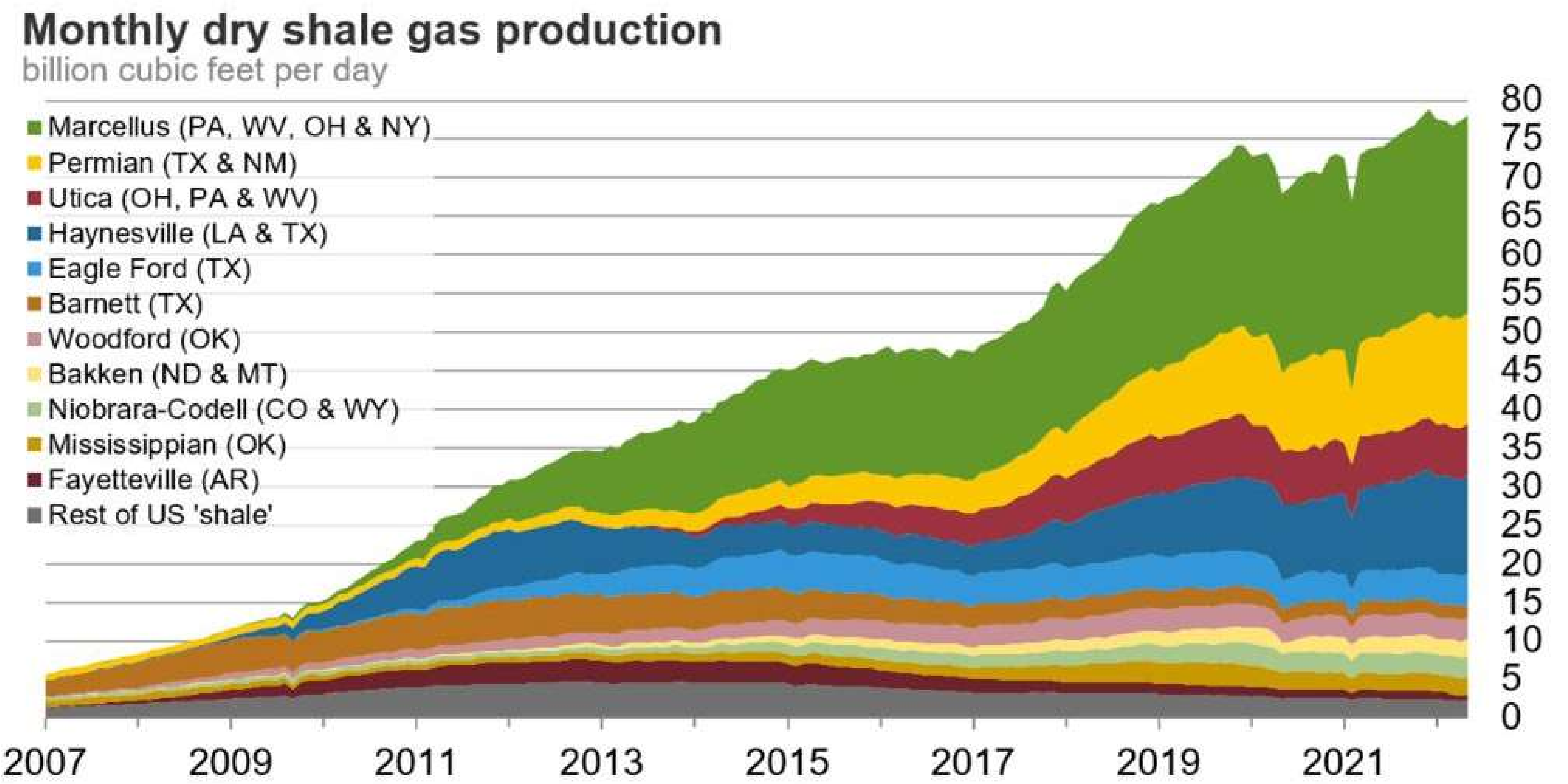
Interstate Natural Gas Association of America

Who is INGAA?

INGAA is the federally focused trade association for the interstate natural gas transmission pipeline industry. INGAA is made up of 26 members representing the vast majority of the interstate natural gas transmission system in the U.S. and Canada, operating almost 200,000 miles of pipeline.



Abundant Natural Gas Supply

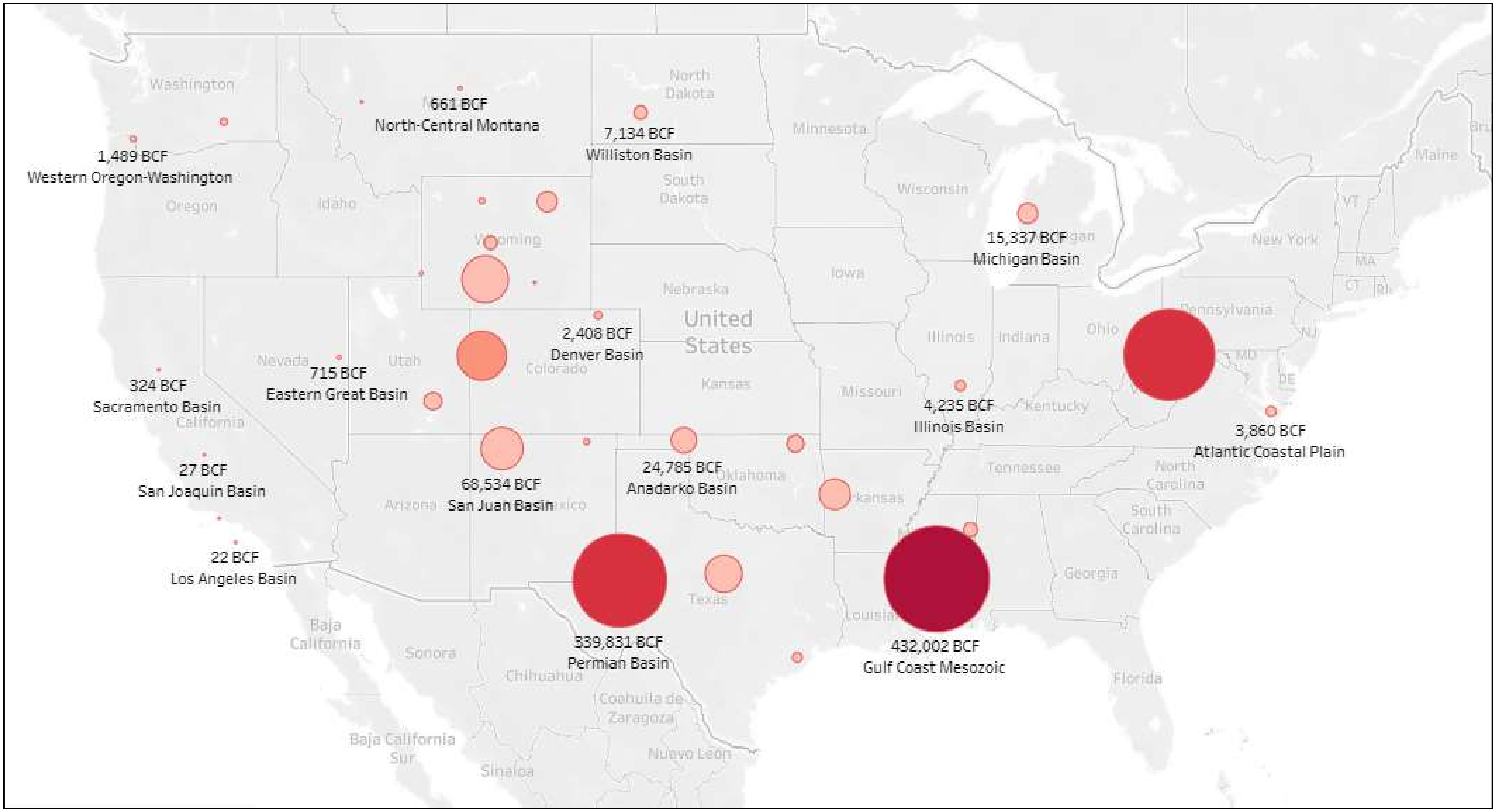


Data source: Graph by the U.S. Energy Information Administration (EIA) based on state administrative data collected by Enverus. Data are through May 2022 and represent EIA's official tight gas estimates, but are not survey data. State abbreviations indicate primary state(s).

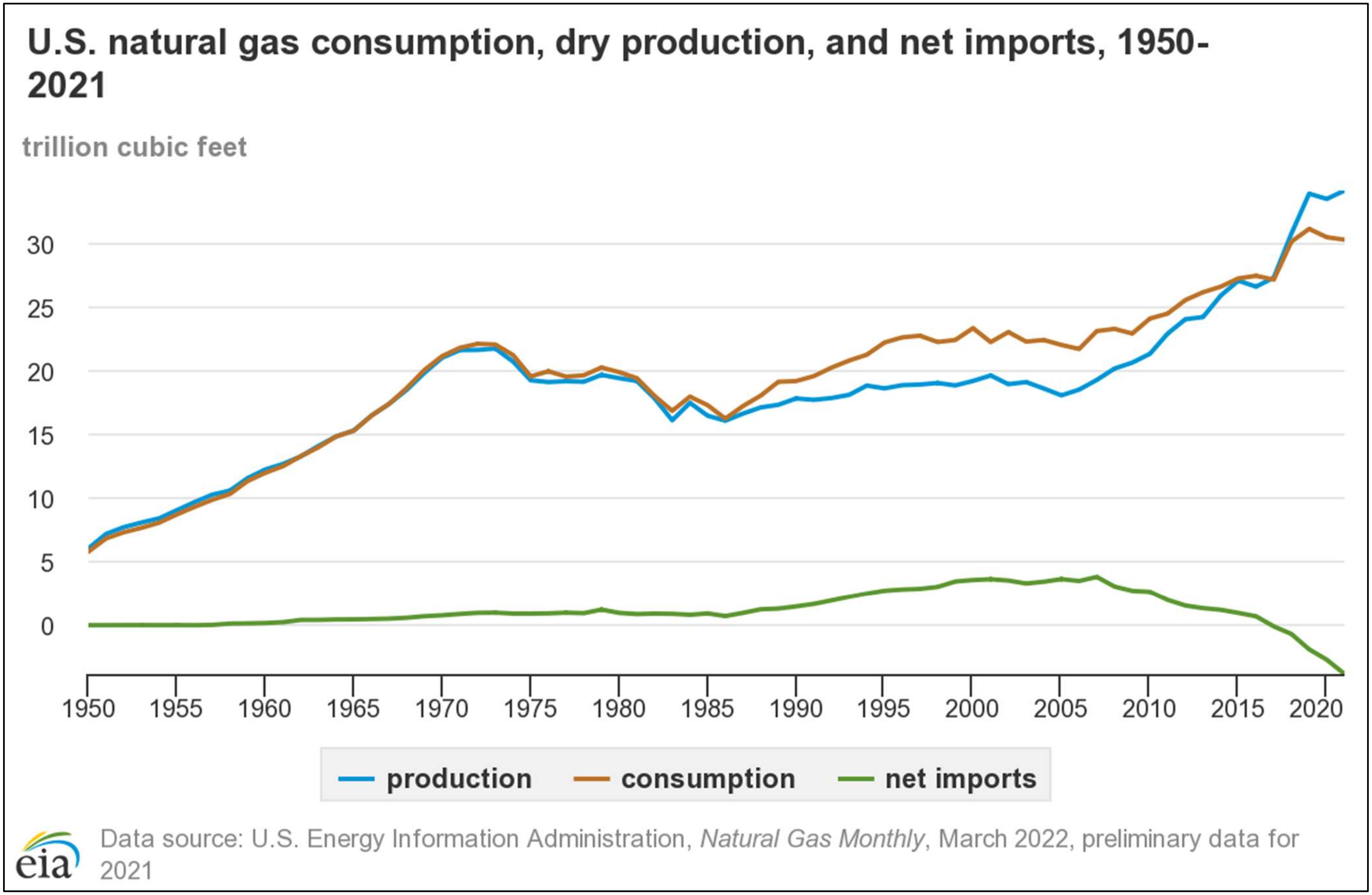
Note: Improvements to play identification methods have altered production volumes of between various plays.

Abundant Natural Gas Supply

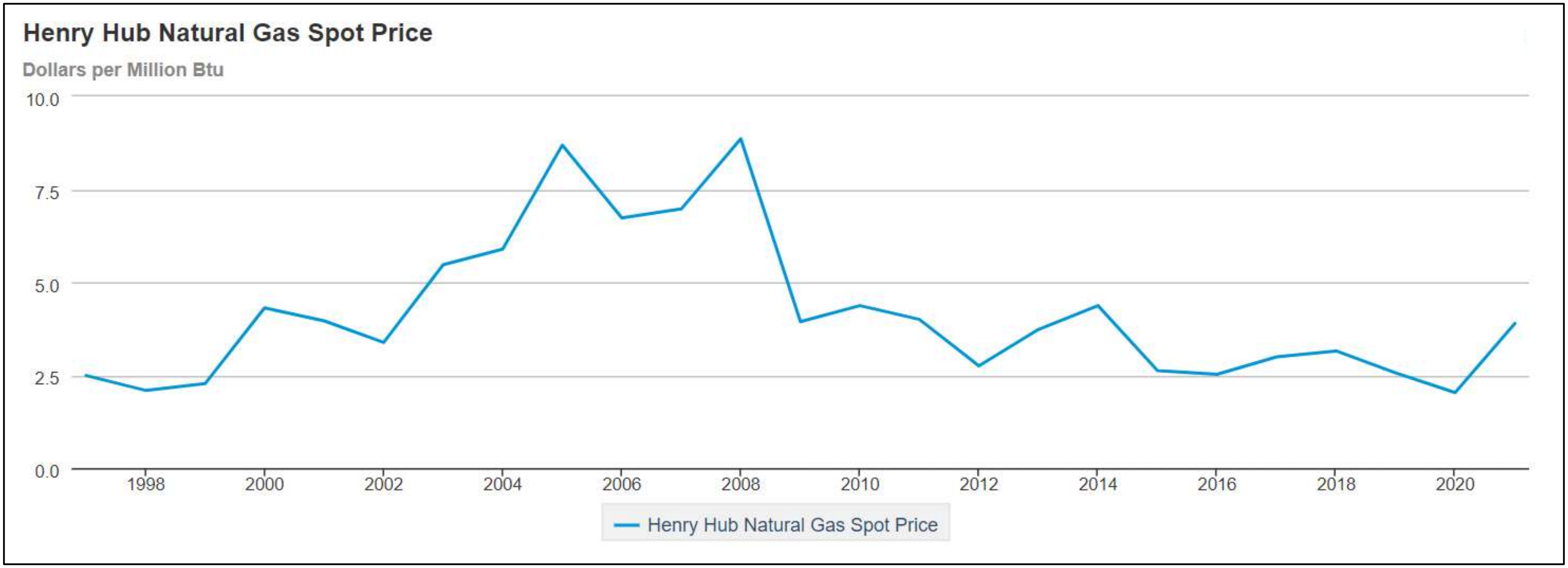
USGS Domestic Continuous Gas Assessments, 2000-Present



Historic Snapshot

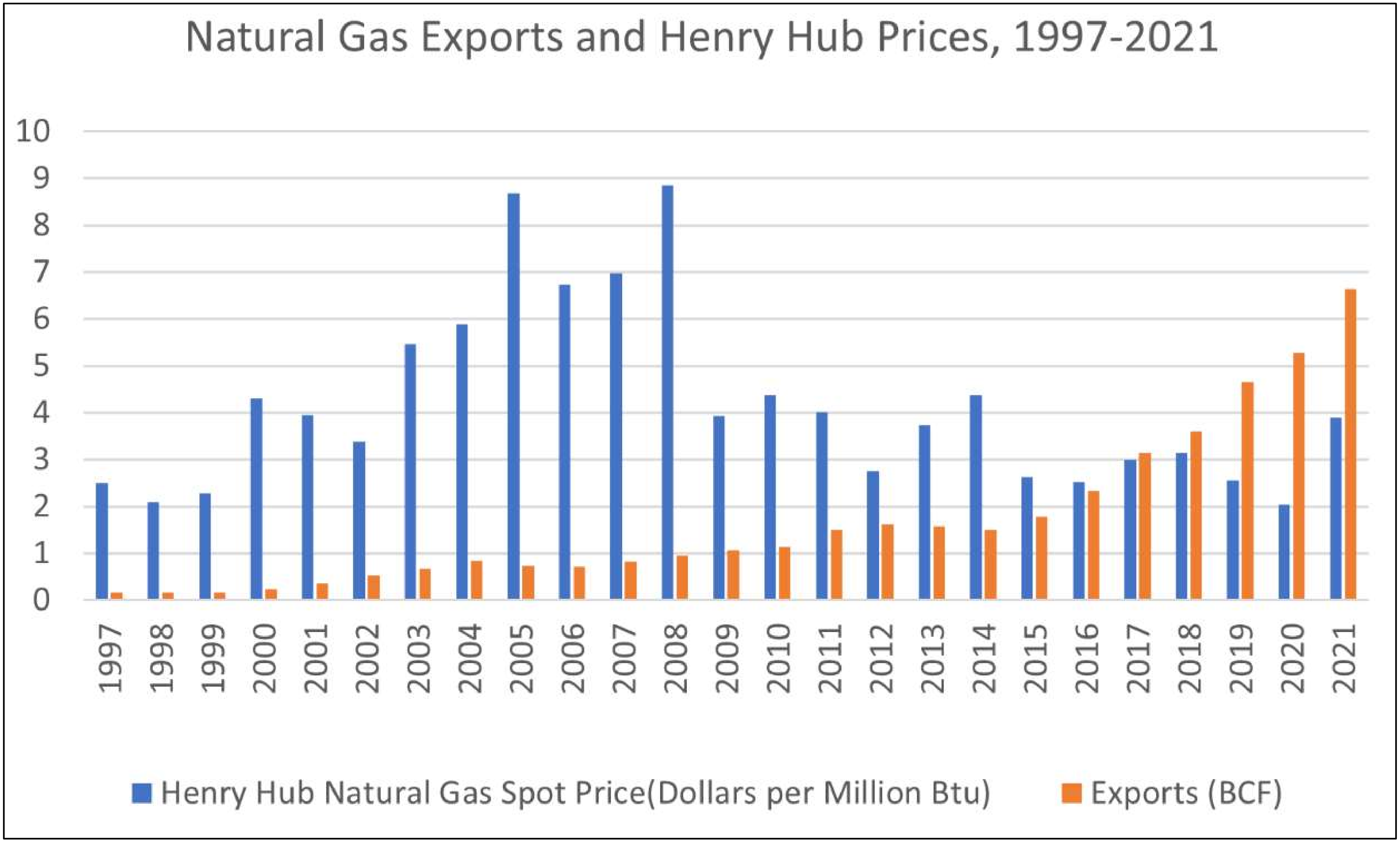


Henry Hub Natural Gas Spot Price (through 2021)



Source: Energy Information Administration

Exports vs. Natural Gas Prices



Source: Energy Information Administration

Planned Capacity that Disappeared (new pipes)

Project Name	State(s)	Cost (millions)	Additional Capacity (MMcf/d)
Atlantic Coast Pipeline	WV,VA,NC	$5,100	1,500
Constitution Pipeline	PA,NY	$683	650
Northeast Energy Direct	PA,NY,MA	$3,300	1,300
Northeast Supply Enhancement Project	PA,NJ,NY	$927	400
PennEast Pipeline	PA,NJ	$1,300	1,107
		$11,310	**4,957**

Planned Capacity that Disappeared (expansion)

Project Name	State(s)	Cost (millions)	Additional Capacity (MMcf/d)
Access Northeast	NY,CT,MA	$3,000	925
Cimarron Expansion Project	OK, KS		631
Sooner Trails Project	OK	$300	1,400
Sweden Valley Project	PA,OH	$50	120
Appalachia to Market Project (A2M Project)	OH,WV,PA,NJ		1,000
Waynoka Gas Supply Lateral Project	OK	$50	225
Wright Interconnect Project	NY	$75	650
Mid-Atlantic Chiller Project	PA,VA		25
Morgantown Connector Project	WV	$191	240
Trail West/N-MAX	OR	$800	450
		$4,466	5,666

Working Together As An Industry

Public messaging
- Continued need for natural gas
- Role of natural gas in manufacturing

FERC Engagement
- Certificate filings
- Draft certificate policy statements

Permitting reform

www.INGAA.org