

The American Gas Association (AGA), founded in 1918, represents more than 200 local natural gas utilities that deliver natural gas to 177 million Americans nationwide. In addition, AGA's broader membership includes natural gas pipelines, Canadian local distribution companies, natural gas gatherers, marketers and storage companies and more than 350 associate members who provide critical products and services to the natural gas industry.



***Pipeline Safety &
Infrastructure Replacement***

Infrastructure Investments

For Economic Renewal

America's natural gas utilities invest billions in our nation's natural gas **2.4 million miles of pipeline infrastructure** — the most extensive, integrated, safe and reliable in the world — which provides access to homes and businesses across the nation.

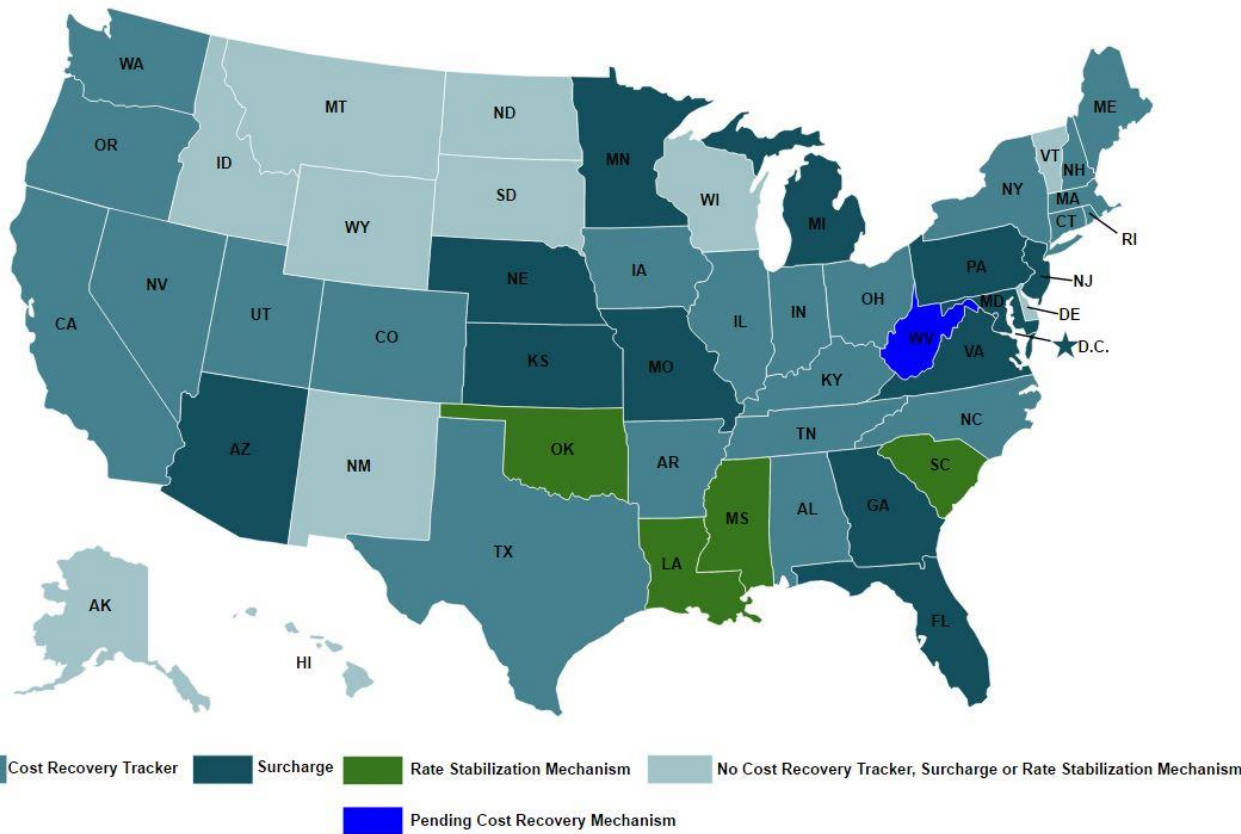
Working with governors, legislators and state regulators around the country, utilities are developing **innovative models for making these capital investments possible**.

Natural gas utilities **spend more than \$19 billion annually to help enhance the safety** of natural gas distribution and transmission systems and to upgrade systems and expand service so more Americans can access this foundation fuel.

Bringing
natural
gas to

177
MILLION
AMERICANS

States with Accelerated Infrastructure Replacement Programs



- *The overall trend is positive*
- *Nine states moved to adopt programs in 2013, alone*
- *NJ, MA, PA & DC adopted pipeline safety measures in 2014*
- *West Virginia is presently considering legislation*
- *States address this issue differently*
- *The basis for these decisions is always just and reasonable rates for consumers*



***Natural Gas Distribution
Infrastructure Expansion***

“Smart Modernization”

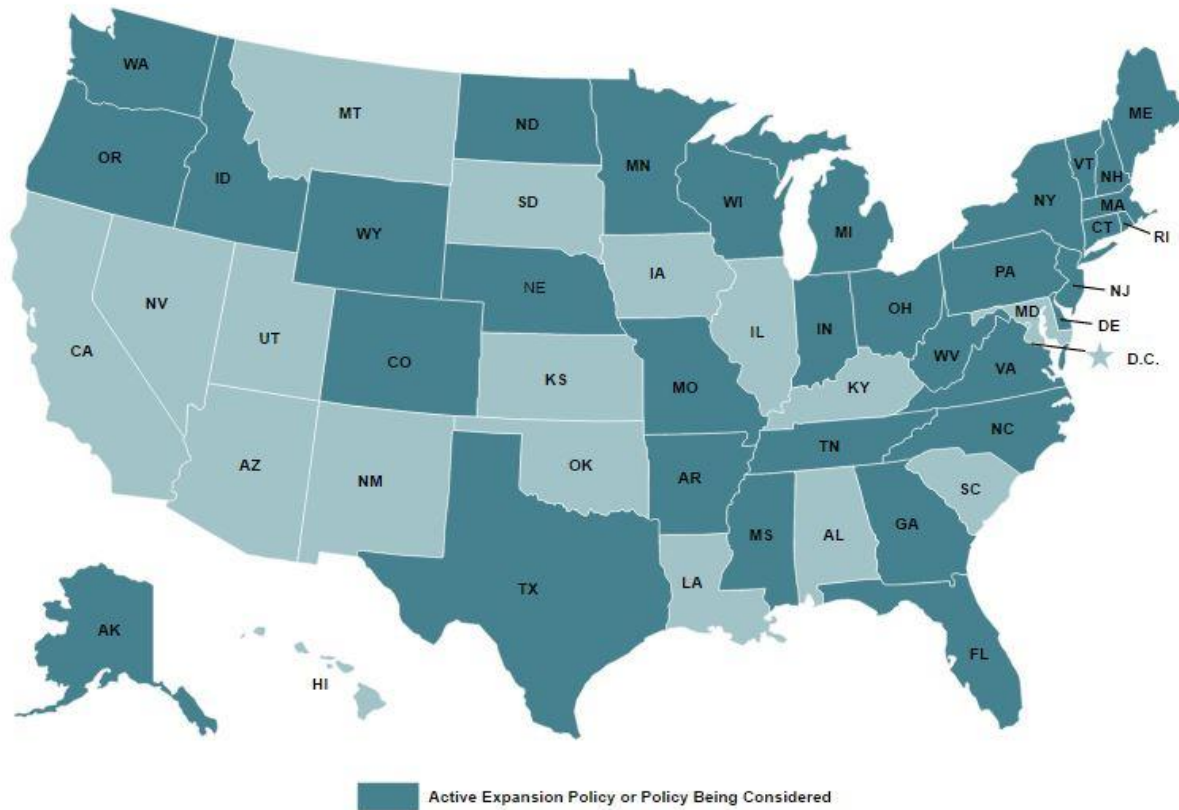
The concept that infrastructure replacement programs, if designed and coupled properly, provide the opportunity to put new technology in the ground which could allow for greater pipeline capacity and pressure in a given area.

With greater capacity, utilities are better positioned to expand to serve more customers.

States with Infrastructure Expansion Programs

33

states presently have or are considering an innovative infrastructure expansion program or policy





***The Declining Trend of Natural
Gas Emissions***



Natural Gas Distribution

Shrinking Emissions by the Numbers

- **65,100** – miles of cast iron & bare steel pipe replaced with PE plastic pipe
- **300,000** – added miles of distribution mains
- **17 million** – number of new customers served (**30% increase**)
- **22%** - emissions shrinkage since 1990
- **0.24%** - EPA estimated emissions of produced natural gas from distribution systems in 2012

Additional Issues

- Implications for States: Federal Regulations
 - 111(d), WOTUS, Furnace Rule
- New technologies
 - NGVs, CHP/Distributed Generation
- Energy Efficiency
- Cybersecurity



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