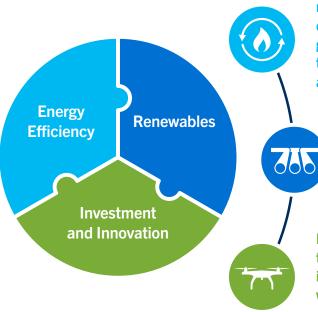


America's Natural Gas Industry Will be Essential to Achieve a Net-Zero Emissions Future

Climate change is a defining challenge across the globe, and America's natural gas, natural gas utilities and delivery infrastructure are essential to meeting our nation's greenhouse gas emissions reduction goals which will achieve a cleaner energy future.

By including natural gas, advanced fuels and our world class infrastructure, we can expand our opportunities to slash emissions, unleash greater innovation and enhance energy reliability.

The natural gas industry is committed to reducing greenhouse gas emissions through smart innovation, new and modernized infrastructure and affordable energy choices for customers. Building successful pathways to net-zero emissions will require a combination of tools and strategies.

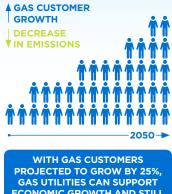


Significant emissions reductions will be realized through expanded utility energy efficiency programs, high-efficiency natural gas appliances and equipment, smart thermostats, improved building envelopes and combined heat and power.

Expanding supply of renewable gas and hydrogen are critical to decarbonizing energy pipelines while maintaining the reliability and resiliency of our integrated natural gas system.

Meeting net-zero emissions requires more than just reducing emissions. Investment and innovation in negative emission technologies will remove carbon from the atmosphere and expedite emission reductions.





GAS UTILITIES CAN SUPPORT ECONOMIC GROWTH AND STILL MEET NET-ZERO EMISSIONS TARGETS BY 2050. The American Gas Association worked with ICF to conduct the first comprehensive analysis exploring natural gas utility pathways to achieve net-zero emissions.

Net-Zero Emissions Opportunities for Gas Utilities presents a national-level approach that leverages the unique advantages of gas technologies and distribution infrastructure. The study underscores the range of scenarios and technology opportunities available as the nation, regions, states and communities develop and implement ambitious emissions reductions plans.

Various pathways to net-zero exist to meet both unique energy demand and emissions targets.

| COMBINED WITH | ACHIEVES | |
|---|---------------------------|--------|
| Emissions Reduction Options | Utility Specific Factors: | |
| ADVANCED PIPELINE REPAIR, REPLACEMENT AND METHANE LEAK DETECTION | GEOGRAPHY | |
| EXPANDED GAS UTILITY EFFICIENCY PROGRAMS | | |
| BUILDING UPGRADES | | |
| CARBON CAPTURE & SEQUESTRATION | | |
| DIFFERENTIATED NATURAL GAS | | ° 👝 |
| GAS HEAT PUMPS | | III oj |
| DISTRICT HEATING, COMBINED HEAT AND POWER | WEATHER | Bo |
| EMISSIONS OFFSETS | *** | |
| HIGH-EFFICIENCY EQUIPMENT | | |
| DEDICATED HYDROGEN INFRASTRUCTURE | ENERGY DEMANDS | n t |
| RENEWABLE NATURAL GAS | | S |
| HYDROGEN BLENDED INTO GAS SUPPLY | | |

Policy support is essential to incentivize demand, fund innovation and deploy technology.