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# Energy Sector Economic Forecast

2016 Pipeline and Gas Distribution  
Conference

## Industry Trends

- Shift in electricity generation from coal to natural gas
- Continued growth of generation from renewable sources
- Abundant natural gas supply will continue to drive pipeline infrastructure investments

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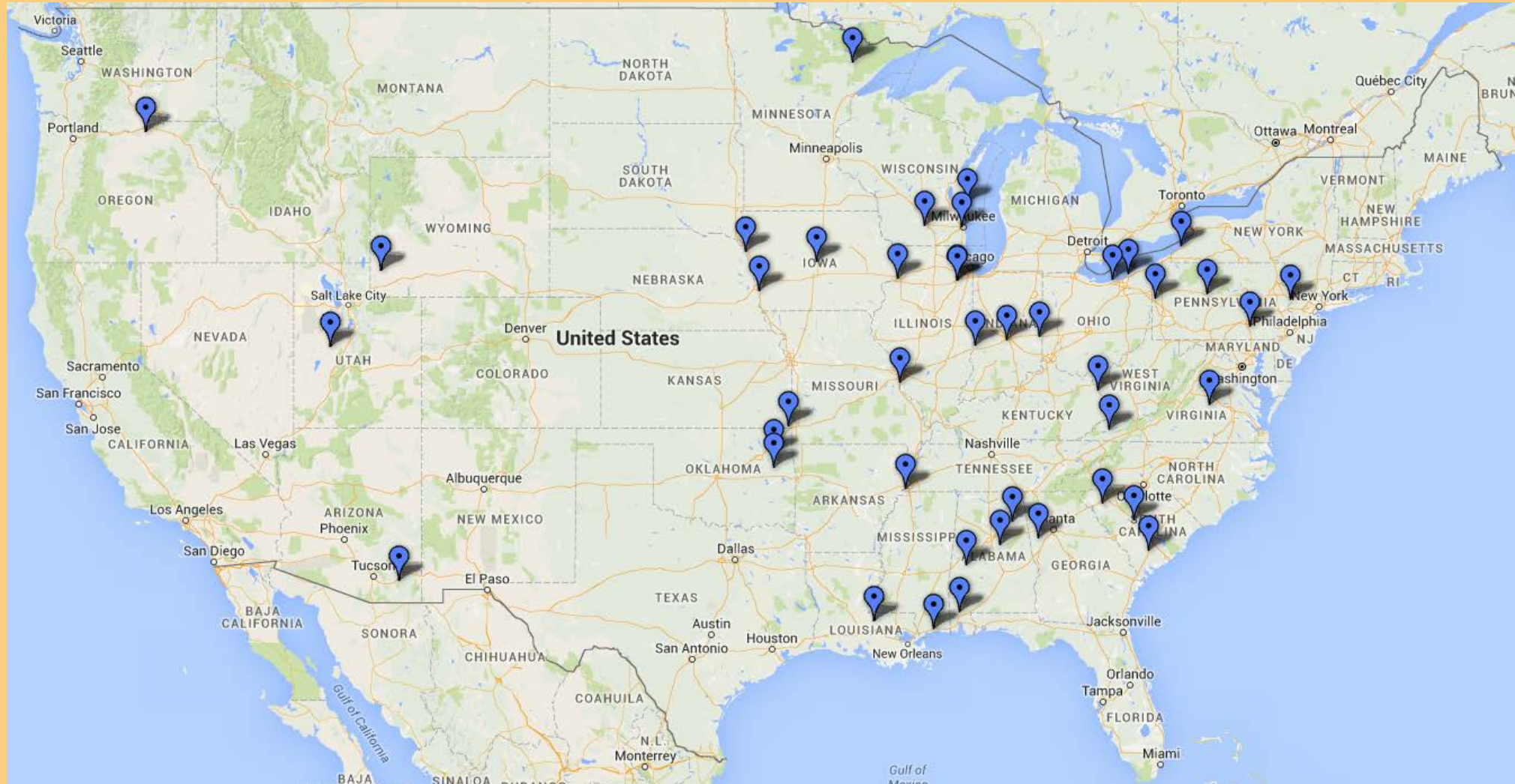
# Retiring Coal Units





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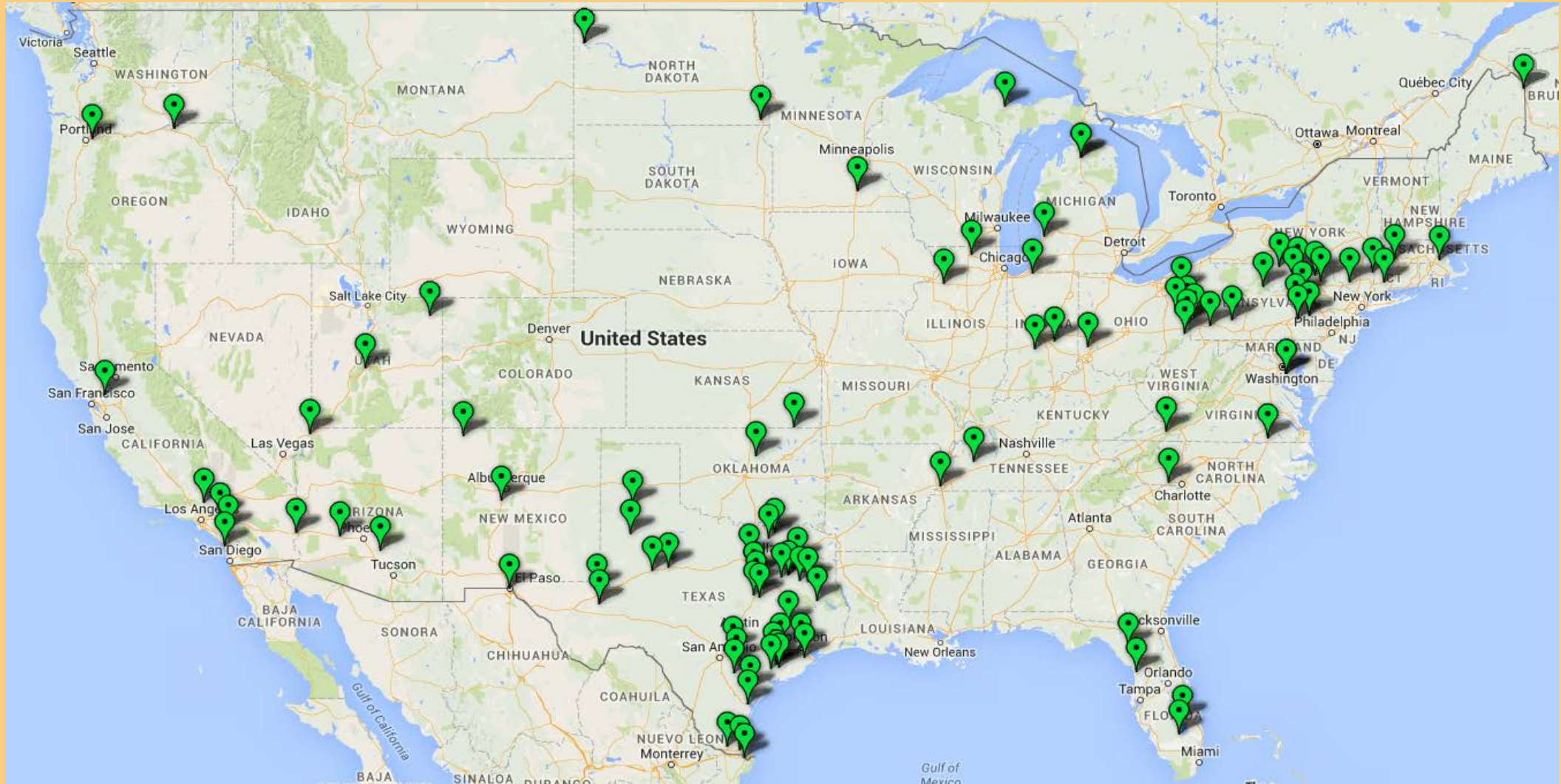
# Coal to Natural Gas Conversions





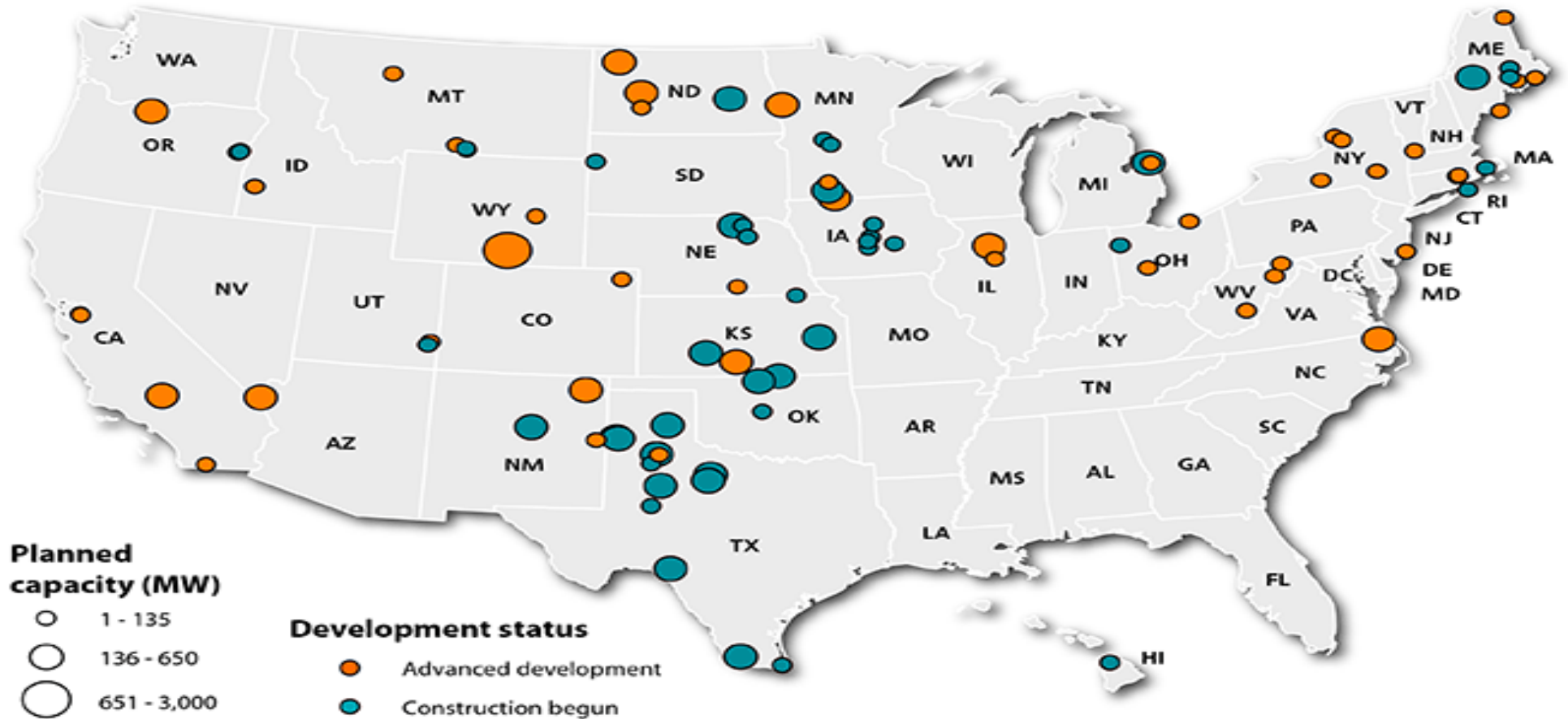
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## Planned Natural Gas Plants



## Wind Projects 2016-2017

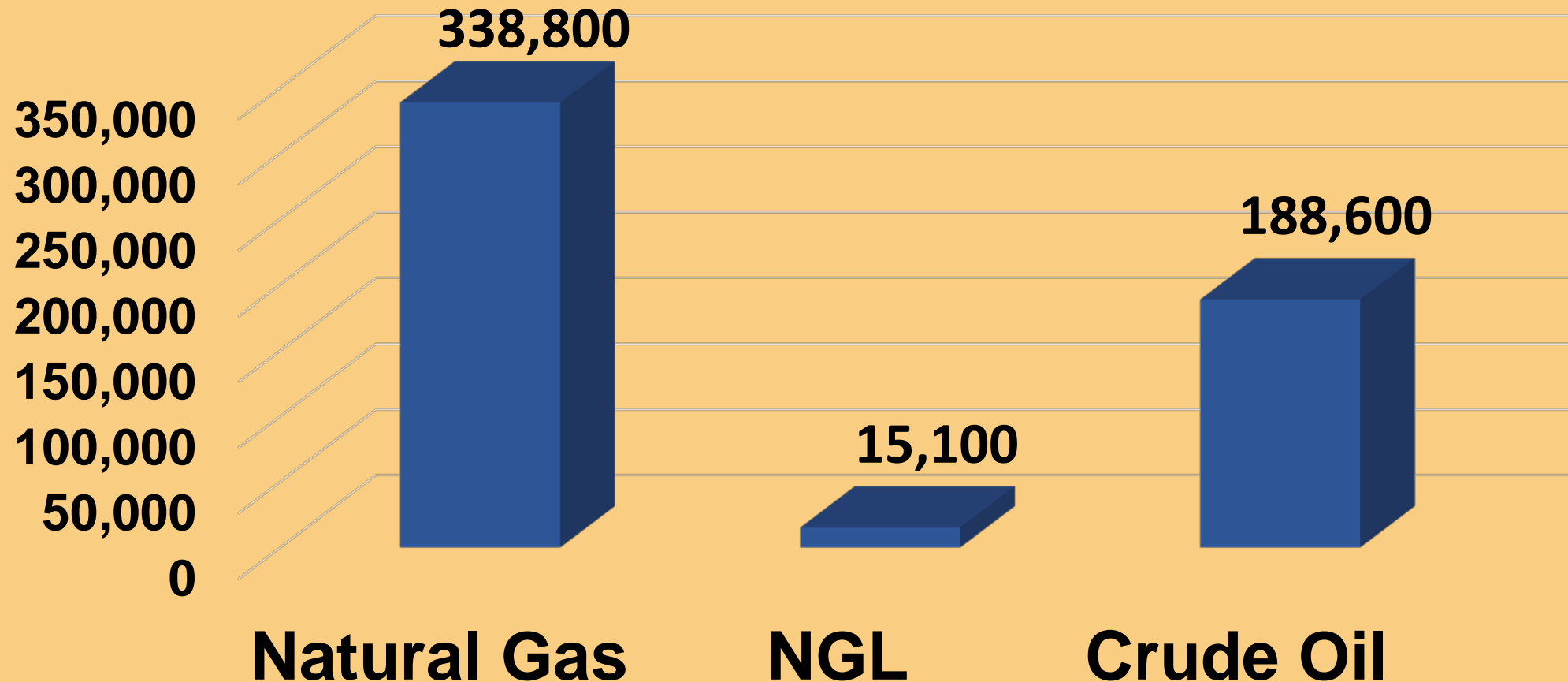
US planned wind projects in advanced development or under construction



As of Feb. 2, 2016.  
Source: S&P Global Market Intelligence  
Map credit: Alip Artates

## Oil and Gas Pipelines

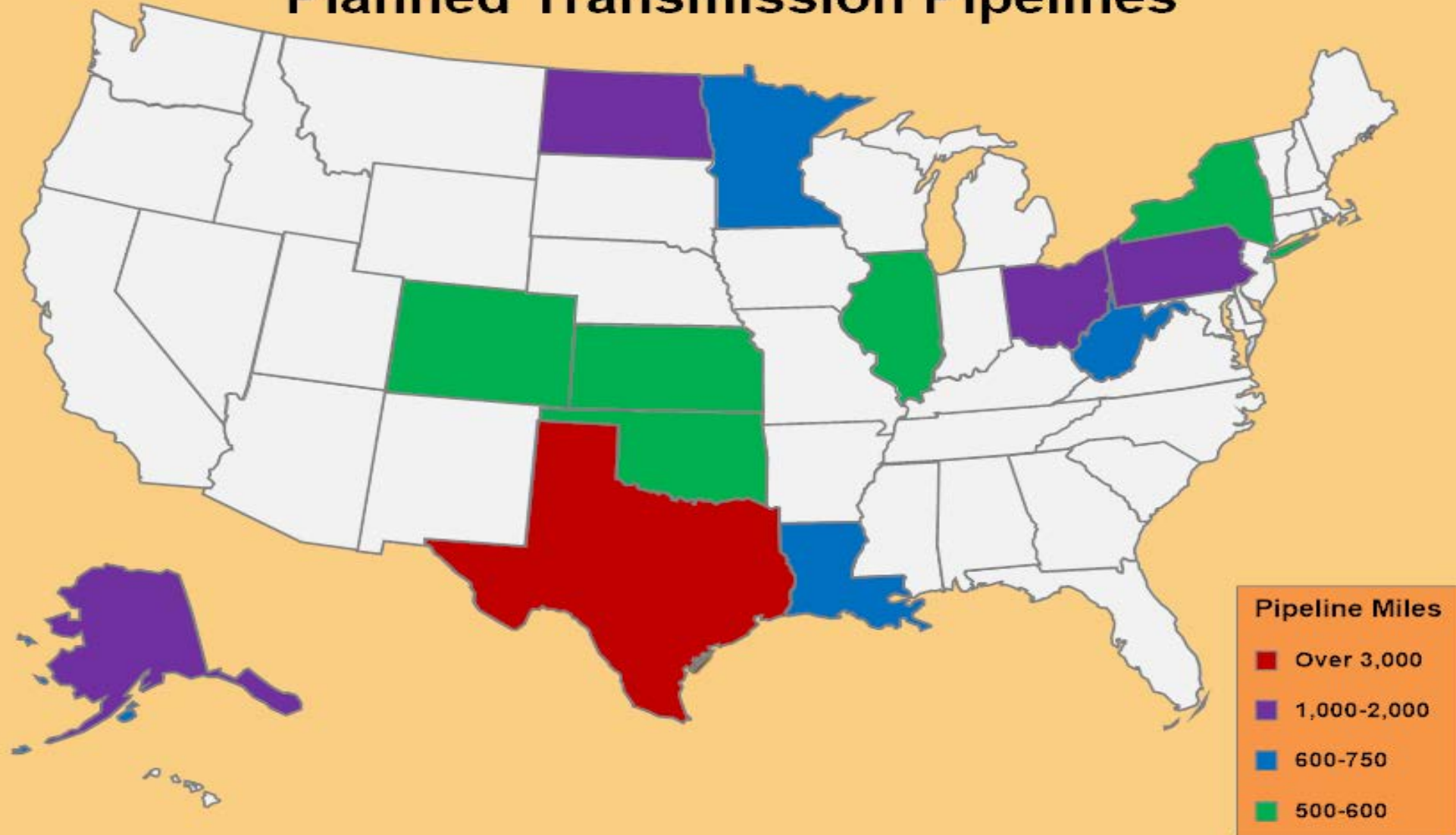
2014-2035: Planned Miles by Sector





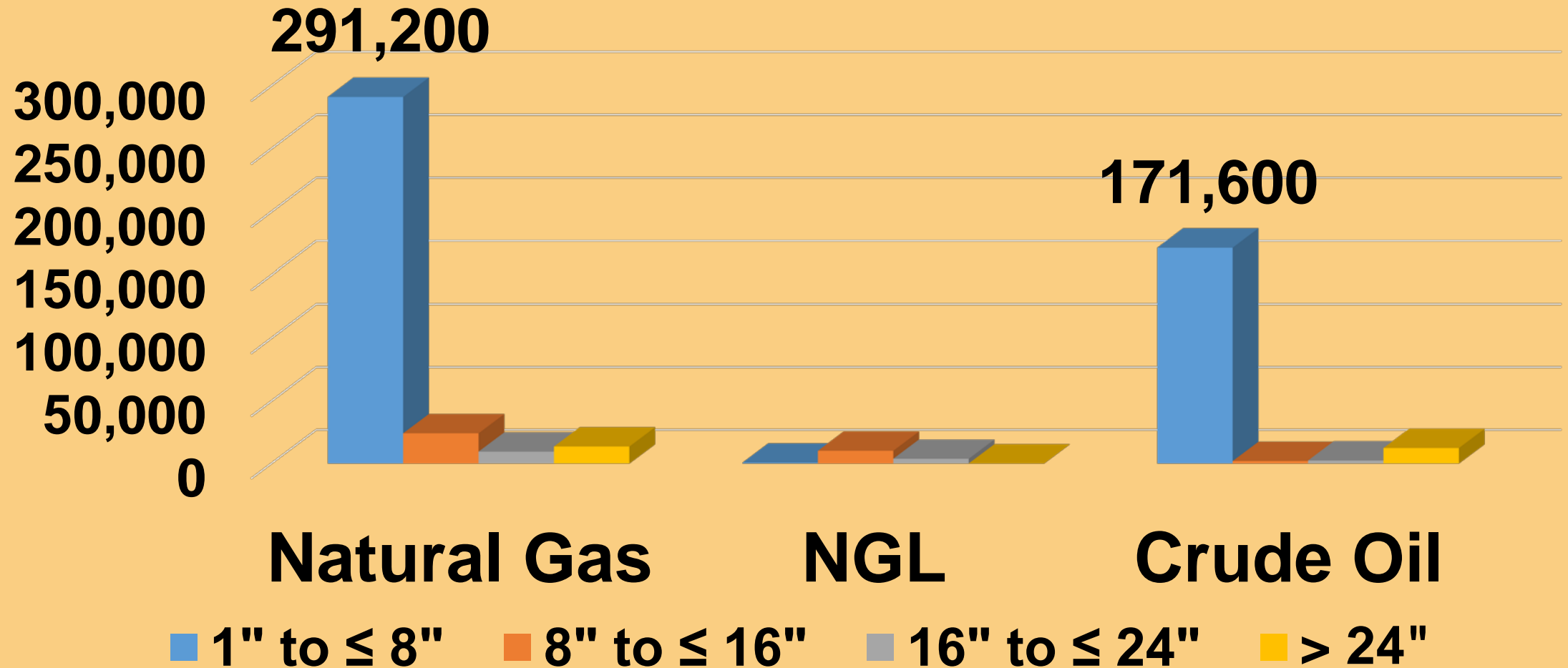
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## Top Locations Planned Transmission Pipelines





## Pipeline Construction, 2014-2035: Miles by Diameter



## Gas Distribution

- The Pipeline and Hazardous Materials Safety Administration established new regulations in 2011 requiring every Gas Company to replace ‘highest-risk pipeline infrastructure.’
- PHMSA estimates that 48,000 miles of gas distribution mains and 2.6 million miles of gas distribution service lines are in need of replacement.
- Gas Distribution companies plan Capital Expenditures totaling \$91 billion on gas infrastructure through 2019.

## EPA Clean Power Plan

- Final Rule with carbon emission reduction goals released August 3, 2015.
- On February 9, 2016, the Supreme Court stayed implementation of the Clean Power Plan pending judicial review
- States are key players moving forward