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Capacity Center is a data services company that tracks and stores natural gas capacity release and related information on over 100 U.S. interstate pipelines. We deliver data and analytics to users daily, and customize our subscriptions to fit your individual needs.

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## FREE TRIAL

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# U.S. PIPELINE CAPACITY TRADING BULLETIN

November 2024

## OCTOBER RECAP

- M/m rise in deals and traded capacity were fairly normal for this seasonal shoulder month; however, there was a sharp rise in annualized equivalent.
- Without Columbia's push last year for long-term deals in advance of GIP's purchase of a 40% equity interest, long-term deals have dropped closer to the prior two years.
- Natural gas demand for generation remained high due to hot weather reaching into October in the west and far south.
- Matterhorn Express Pipeline began service October 1, carrying Permian shale gas toward the Gulf Coast, easing bottlenecks.
- Net injections into storage are still low compared to 5 year average, but will most likely carry on into November\*

\*US EIA Natural Gas Weekly Update

## TRENDS FOR TOP 10 PIPELINES

|                        | October 2024 | % change m/m | % change y/y |
|------------------------|--------------|--------------|--------------|
| Number of Deals        | 6,170        | 87%          | -1%          |
| Traded Capacity Dth/d  | 30,757,816   | 75%          | 7%           |
| Annualized Equiv Dth/d | 14,746,064   | 267%         | 22%          |
| Spot Deals             | 2,201        | -331%        | -2%          |
| Mo. to Yr. Deals       | 3,900        | 41%          | 6%           |
| Yr.+ Deals             | 69           | 590%         | -76%         |

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## CAPACITY RELEASE DETAILS FOR TOP 10 PIPELINES

| Sept Rank | Oct Rank | Pipeline                 | Annualized Equiv Dth/d | No of Deals | Traded Capacity Dth/d | Spot Deals | Month to Year Deals | Year+ Deals |
|-----------|----------|--------------------------|------------------------|-------------|-----------------------|------------|---------------------|-------------|
| 2         | 1        | TRANSCO                  | 3,318,300              | 1,407       | 8,207,748             | 633        | 767                 | 7           |
| 1         | 2        | TENNESSEE GAS PIPELINE   | 2,825,754              | 1,032       | 3,625,404             | 321        | 682                 | 29          |
| 4         | 3        | TETCO                    | 2,735,540              | 1,104       | 3,927,613             | 426        | 671                 | 7           |
| 7         | 4        | EASTERN GAS TRANSMISSION | 1,110,746              | 796         | 4,179,892             | 544        | 248                 | 4           |
| 3         | 5        | GULF SOUTH PIPELINE      | 1,030,807              | 45          | 1,484,200             | 9          | 35                  | 1           |
| 6         | 6        | COLUMBIA                 | 1,029,820              | 1,022       | 3,593,082             | 40         | 974                 | 8           |
| 5         | 7        | ALGONQUIN                | 932,441                | 459         | 2,913,481             | 151        | 307                 | 1           |
| 11        | 8        | ANR PIPELINE             | 737,442                | 222         | 1,456,354             | 68         | 143                 | 11          |
| 13        | 9        | NATURAL GAS PIPELINE CO  | 537,858                | 66          | 785,042               | 7          | 58                  | 1           |
| 37        | 10       | ROVER PIPELINE           | 487,356                | 17          | 585,000               | 2          | 15                  | 0           |