### Together for Tomorrow



Serving energy demand by traditional and non-traditional methods at Enbridge Gas Hilary Thompson, Director S&T Business Development



### Introduction to Enbridge Gas Inc.

Critical infrastructure serving 5th largest population centre in North America





Largest Natural Gas Utility in North America by Volume<sup>1</sup> Total Annual Volumes (Bcf)



Enbridge Gas also serves the Great Lakes Region in Canada and the U.S. in storage and transportation services

(1) American Gas Association Statistics Database: Utility Rankings, excluding pipeline-only companies

ENBRIDGE

Life Takes Energy

#### Serving energy demand

### What does it mean for us now?





Serving energy demand in Canada and the U.S.

### Natural gas outlook to 2050



Natural gas continues to have an important role in North America as we move towards net-zero targets

Source: (left) Canada Energy Regulator, Canada's Energy Future, Dec.2, 2020; (right) U.S. Energy Information Administration, Annual Energy Outlook 2021 (AEO 2021) Natural Gas, Feb.3, 2021



#### Serving energy demand in Ontario

# Unassailable natural gas fundamentals





#### Most cost-effective, reliable means of space heating and industrial feedstock

(1) Source: Natural Resources Canada

Serving energy demand in Ontario and the Great Lakes Region

# The Dawn Hub and growing our assets



High deliverability storage and reliable transportation connections to major pipelines underpin security of supply

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### The future of energy

	Traditional Core Growth			Low-Carbon Growth				
	Optimize / Expand	Exports	Modernize Assets	Sol Wi	lar/ nd	RNG	H2	CCUS
Gas Transmission	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\sim$		$\bigcirc$	$\bigcirc$	$\bigcirc$
Gas Distribution	$\bigcirc$		$\bigcirc$			$\bigcirc$	$\bigcirc$	$\bigcirc$

Embedded traditional and low-carbon growth opportunities across our businesses

(1) Solar self-power program

Serving energy demand though new and innovative methods

# Our traditional infrastructure





Pathways to emissions reduction are already part of our business

Serving energy demand though new and innovative methods

### Our non-traditional infrastructure



	Renewable natural gas	Compressed natural gas	Behind the meter	Hydrogen power to gas & blending		
				radice Mices		
Description	From organic landfill waste or anaerobic digesters	For transport market and remote customers	Technology in development including gas heat pumps, hybrid heating and mCHP	Hydrogen blending in utility gas distribution system		
Projects	<ul> <li>3 – operational</li> <li>3 – in construction</li> </ul>	<ul> <li>12 – fuelling stations</li> </ul>	<ul> <li>&gt;40 projects in development</li> </ul>	<ul> <li>1 – operational (P2G)</li> <li>2 – in development (2 – 5% hydrogen blending)</li> </ul>		

Gradually increasing our ability to serve customers through RNG, CNG, hydrogen, and other investments

Serving energy demand though combined methods

## Forecasted growth in the near term

- Customer growth and community expansion
  - ~45K new customer additions annually
  - Over 200 expansion projects
- System reinforcements
  - Execution of a long-term asset plan
  - Continued investment for safe and reliable operations
- Anticipate continuation of growth post-2024
- Advancing hydrogen blending and RNG development strategy



Gradually increasing our ability to serve customers through renewable natural gas, CNG, and hydrogen investments



<sup>(1)</sup> Gatineau Hydrogen Blending project is being jointly developed through Enbridge's subsidiary Gazifère and Evolugen, the Canadian operating business of Brookfield Renewable.



# Bridge to the Energy Future

