



IN THE PIPELINE

TEXAS PIPELINE ASSOCIATION NEWSLETTER

SPRING 2025



FROM THE CHAIRMAN

It is no secret that Texas has grown exponentially during the past 30 years. In fact, the population has nearly doubled since 1989. According to the Electric Reliability Council of Texas (ERCOT), this growth is expected to continue as we near the end of the decade. As our population has grown, so has the demand for electric generation.

Year	TX Population (million)	Total Generation Capacity	Peak Load
1989	16.9	64 MW	NA
2025	30.5	103 MW	86.7
2029	32.1	92 MW	137.1

A focus on reducing greenhouse gas emissions has resulted in a greater share of the state's electric generation sources changing from fossil fuels to renewables. According to ERCOT, the renewable sources of wind and solar last year accounted for approximately 34 percent of Texas' electric generation.

Fuel Source	1989	2024
Gas-fired Generation	69%	44%
Coal	24.7%	13%
Nuclear	4.3%	8%
Wind	0%	24%
Solar	0%	10%

Now, why did I pick 1989 as an important reference point? For four reasons:

1. It demonstrates the significant population growth within the state;
2. It clearly shows the transition trend from a fossil fuel-based generation fleet to a more renewable/variable fleet;

3. During this period, the state moved from a regulated electric market to a deregulated electric market; and
4. Texas experienced a similar cold weather event in December 1989 as it did in February 2021. It is clear that population growth alone will drive the electric demand higher within the state over the next five years. Adding to that is the expected data center demand, which will only exacerbate the problem of our constrained grid. Texas must build new reliable electric generation quickly to meet this growing demand.

Natural gas is a critical fuel to support this rising electric demand because it is abundant, reliable and cleaner-burning. We also have a robust natural gas pipeline infrastructure network within Texas designed to extract and transport the natural gas needed to fuel the electric generation required to support this massive growth.

As some of you may remember, Texas had an extreme cold weather event in December 1989 similar to Winter Storm Uri in 2021. During the earlier event, ERCOT instituted firm load shedding only for a few hours on Dec. 23, 1989. As can be seen in the chart above, natural gas was the primary fuel source for the generation facilities within the state at that time. The state also didn't experience rolling blackouts like it did during Uri. Coincidence?

Well, you can probably guess what I think about that. We need reliable, dispatchable and affordable energy sources to power our state, as well as an adequate pipeline infrastructure to move these vital hydrocarbons to where they need to go.

Our Association and its members will be critical to meeting this demand growth. I look forward to helping lead this effort in the coming years.

Larry Bell,
Kinder Morgan Intrastate Pipelines
Chairman, Texas Pipeline Association

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PRESIDENT'S MESSAGE



Friends,

We are officially past the halfway point of the 89th Legislative Regular Session and the pace continues to accelerate. The Texas Senate passed its version of the state budget, along with a myriad of bills deemed Senate priorities. House committees have been rapidly hearing bills and have their first floor calendar to consider bills on April 1. There are a little less than 50 days for the Texas House to consider legislation and just a little over 60 days until the Regular Session adjourns sine die. TPA has been working diligently during this time to analyze, assess and testify on legislation relating to our industry and have been continuing to educate legislative offices on key industry priorities.

While the workload will remain heavy over the next few months, our industry is well positioned because of the hard work of our extended team. It is a real testament to TPA member companies for hiring the best people in the business, from in-house and contract advocates to the employees who dedicate their talents for the benefit of the pipeline industry. Thank you to all who are engaging in this process and know that your efforts make a tremendous positive difference!

TPA testified in opposition in Senate State Affairs on two eminent domain related bills. James Freeman of the Zabel/Freeman law firm

testified on behalf of TPA as to how the bills created a legal conflict in statute that will lead to increased litigation for pipeline projects and therefore put them in jeopardy. A big thank you to James for his excellent testimony. TPA also visited with Senate offices regarding other bills that could hinder industry; our message of not slowing down the need for critical infrastructure was well received. These actions pay big dividends as legislation makes its way through, or stalls in the process. We will continue to provide updates as session moves along.

The weeks ahead will be inundated with hearings, Senate and House Floor actions and meetings. If there are issues that we do not have on our bill tracking list that you or your member company deem important, please reach out to us so we can add them to our overall legislative strategy. In the meantime, we look forward to continuing to advocate for one of the most vital industries in the state.

In closing, I want to share the wonderful news that our V.P. and General Counsel Jennifer Coffee O'Neill welcomed the newest addition to her family, her daughter Margaret Katherine Elizabeth O'Neill! Jennifer, Maggie and dad Patrick are all doing great. We could not be more happy for them!

My best to you and yours,
Thure Cannon

TRUMP ADMINISTRATION ENVIRONMENTAL DEVELOPMENTS

By Don Lewis, Duggins Wren Mann & Romero, LLP

The election of Donald Trump to a second term was widely expected to usher in a significantly different approach to federal environmental policy and regulation than we had seen under the Biden Administration. Those expectations are proving to be well-founded.

Immediately upon taking office, President Trump announced a host of Executive Orders and related actions affecting federal environmental law and policy. Among the most important of those were the following:

- An order declaring that the integrity and expansion of the country's energy infrastructure is an immediate and pressing priority for the protection of U.S. national and economic security.
- An order declaring that it is U.S. policy to encourage energy exploration and production and to ensure that all regulatory requirements related to energy are grounded in clearly applicable law, and requiring agency heads to identify existing rules and policies that impose an undue burden on the energy industry so that they can potentially be suspended, revised or rescinded; the

order also revoked numerous Biden Administration Executive Orders pertaining to climate change, environmental justice and related initiatives and requires agencies to undertake all available efforts to eliminate permitting delays.

- The President also ordered the Director of the National Economic Council and the Director of the Office of Legislative Affairs to prepare recommendations to Congress, which shall "facilitate the permitting and construction of interstate energy transportation and other critical energy infrastructure, including, but not limited to, pipelines, particularly in regions of the nation that have lacked such development in recent years" and "provide greater certainty in the federal permitting process, including, but not limited to, streamlining the judicial review of the application of NEPA" (the National Environmental Policy Act).
- In addition, the President directed the U.S. Environmental Protection Agency (EPA) to address current inadequacies in the calculation of the "social cost of carbon," which figures into

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the cost-benefit analysis used to justify new regulations, and to review the legality and continuing applicability of the greenhouse gas endangerment finding, which forms the legal basis for numerous current rules curbing greenhouse gas emissions.

More recently, President Trump signed an Executive Order requiring the elimination of 10 existing rules or guidance documents whenever an agency promulgates a new rule or guidance document.

On March 14, EPA Administrator Lee Zeldin announced a suite of important deregulatory initiatives, including the following relevant to the pipeline and oil and gas industry:

- Reconsideration of oil and gas rules contained in Subparts 0000b and 0000c;
- Reconsideration of the Greenhouse Gas Reporting Program;
- Reconsideration of Biden Administration amendments to the Risk Management Program rules;
- Reconsideration of the 2009 greenhouse gas Endangerment Finding and regulations and actions that rely on that finding;
- Reconsideration of the PM2.5 PM NAAQS;
- Reconsideration of various NESHAP rules related to the energy industry;
- Restructuring the Regional Haze Program;
- Revising the social cost of carbon used to assess regulatory costs;
- Redirecting enforcement resources to EPA's core mission to relieve the economy of unnecessary bureaucratic burdens;
- Terminating the Biden Administration's Environmental Justice and DEI initiatives;
- Ending the "Good Neighbor Plan" regarding emissions affecting downwind states;

“IT IS CLEAR THAT WE ARE INTO A NEW PHASE OF FEDERAL ENVIRONMENTAL REGULATION AND POLICY, WITH A DEREGULATORY FOCUS AND AN EMPHASIS ON FREEING COMPANIES FROM RESTRICTIONS AND REGULATORY REQUIREMENTS DEEMED TO BE UNDULY BURDENSOME.”

- Working with states to resolve pending issues related to state implementation plans; and
- Reconstituting the Science Advisory Board and Clean Air Scientific Advisory Committee.

President Trump also recently signed into law two Congressional Review Act resolutions, nullifying a late-term Biden Administration rule implementing a “waste emission charge” imposed by EPA on “excess” methane emissions and a rule requiring oil and gas leaseholders on the outer continental shelf to submit an archaeological report before drilling or laying pipelines. More Congressional Review Act revocation of Biden era rules is expected to occur.

It is clear that we are into a new phase of federal environmental regulation and policy, with a deregulatory focus and an emphasis on freeing companies from restrictions and regulatory requirements deemed to be unduly burdensome. A significant amount of notice and comment rulemaking to implement a number of the above initiatives should be expected, as well as the inevitable court cases and attendant delay. As always, we will monitor and report these changes to you so you can stay advised of new developments.

89TH TEXAS STATE LEGISLATURE WELL UNDERWAY

By Anne T. Billingsley, ONEOK, Inc.



Although Texas' 89th Regular Legislative Session may have gotten off to a slow start – with opening day on Jan. 14 – it is now well underway. The session began with no real idea who was going to be elected Speaker of the House. On a second-round ballot, Rep. Dustin Burrows (R-Lubbock) was elected, with 36 Republicans and 49 Democrats casting their vote. The

Senate elected Brandon Creighton (R-Conroe) as President Pro Tempore for the session and welcomed two new members: Sens. Adam Hinojosa (R-Corpus Christi) and Brent Hagenbuch (R-Denton).

On March 14, the 60-day marker and bill filing deadline occurred with more than 8,800 bills filed in the House and Senate. Several committees in the Senate have been meeting regularly since mid-

February, while House committees are beginning to get through their organizational hearings and on to more substantive bills in the coming weeks. Committees will begin to run later into the day and evening and the state budget will need to be passed by the House (the Senate has already done so).

TPA is following several bills on state grid and electricity issues, ERCOT, market monitoring, critical infrastructure and eminent domain.

- SB 6 by Phil King (R-Weatherford) relates to electricity planning and infrastructure costs for large loads.
- SB 291 by Charles Schwertner (R-Georgetown) relates to the failure to disclose certain appraisal reports by an entity with eminent domain authority in connection with an offer to acquire real property.

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- SB 1009 by Mayes Middleton (R-Galveston) relates to the adoption of the Uniform Easement Relocation Act.
- SB 2434 by Tan Parker (R-Flower Mound) relates to the prioritization of natural gas deliveries to certain electric power generation units.
- HB 206 by Tom Craddick (R-Midland) relates to limitations on a county's authority to require a cash bond before approving the construction of a pipeline.

TPA will continue to monitor these developments and let you know when you need to get involved to help us ensure that this is a successful session for our industry.

89th Texas Regular Legislative Session

- **Session Start:** The 89th Regular Legislative Session began on Jan. 14, 2025, and will continue until June 2.
- **House Speaker Election:** Dustin Burrows (R-Lubbock) was elected as the new House Speaker, defeating David Cook (R-Mansfield).
- **Session Length:** The regular session runs for 140 calendar days.
- **Bill Filing Deadline:** The deadline for filing new bills was March 14, with some exceptions for emergency matters.
- **Governor's Action Deadline:** The Governor has until June 22 to sign or veto any bills passed during the session.
- **Laws Going Into Effect:** Most new laws go into effect on Sept. 1, though some emergency legislation may go into effect earlier.

INDUSTRY NEWS



TRUMP'S EPA REGION 6 PICK

President Trump has selected W. Scott Mason IV of Oklahoma as the new EPA Regional Administrator for Region 6, which covers Texas, Oklahoma, Louisiana, New Mexico and Arkansas. You can find more information on the [EPA website](#).

TEXAS ENERGY DAY AT THE CAPITOL

In a show of great strength, thousands of oil and gas industry members convened on the Capitol on Feb. 4 to help educate the legislature on the tremendous contributions of the industry to the state. Kinder Morgan was one of several TPA member companies who joined the entire Texas oil and gas industry on that day. Many speakers addressed the crowd in the morning, including Railroad Commission of Texas Chairman Christi Craddick.



LEFT: Feb. 4 was a big day at the Capitol for the Texas energy industry. CENTER: TPA Chairman Larry Bell with TPA President Thure Cannon. TOP RIGHT: RRC Commissioner Christi Craddick addressed the crowd. BOTTOM RIGHT: Kinder Morgan brought a big group to the Capitol.

TIPRO REPORT OUTLINES TREMENDOUS OIL AND GAS CONTRIBUTIONS TO TEXAS AND NATION



The Texas Independent Producers & Royalty Owners Association's (TIPRO) latest State of Energy report, which was released in March, found that the U.S. oil and gas industry employed 2,055,516 professionals in 2024.

That figure represented a net increase of 10,694 direct jobs compared to 2023, subject to revisions. When incorporating direct, indirect, and induced multipliers for employment at the national level the industry supported 22,625,187 million jobs last year.

There were 384,187 direct U.S. upstream sector jobs in 2024, which was a net increase of 1,259 jobs compared to 2023.

The largest sector by employment in the U.S. oil and gas industry was Gasoline Stations with Convenience Stores with 886,041 workers in 2024. This was followed by Support Activities for Oil

and Gas Operations, with 218,029 workers, Oil and Gas Pipeline and Related Structures Construction, with 142,722 workers, and Natural Gas Distribution, with 116,473 workers.

The largest increase in jobs in 2024 occurred in Natural Gas Extraction, "with a net increase of 5,830 compared to 2023". This was followed by Oil and Gas Pipeline and Related Structures Construction, with an increase of 5,167, Gasoline Stations with Convenience Stores, with an increase of 3,800 and Pipeline Transportation of Natural Gas, with an increase of 2,449.

The oil and gas industry paid a national average wage of \$81,808 last year. Workers in Crude Oil Extraction earned the highest annual average wage of all oil and gas industry sectors at \$227,080. This was followed by Natural Gas Extraction, with an annual average of \$176,800 and Petroleum Refineries, with an annual average of \$172,191.

The report can be accessed [on the TIPRO website](#).

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HELP SPREAD THE WORD. IF YOU'RE ON X (FORMERLY TWITTER), PLEASE TAKE A FEW MINUTES TO SHARE THESE PRO-INDUSTRY TWEETS.

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More Pipelines, More Gas, Lower Prices? #pipelines #natgas #naturalgas #energy #fuel #Texas #txlege #prices #lowerprices | OilPrice.com oilprice.com/Energy/Natural... #oilprice

oilprice.com
More Pipelines, More Gas, Lower Prices? | OilPrice.com
This year, more gas pipelines could be announced or revived, with the support of the Trump Administration

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Natural gas pipeline project completions increase takeaway capacity in producing regions #pipelines #fuel #energy #Texas #infrastructure #natgas #naturalgas #LNG

bicmagazine.com
Natural gas pipeline project completions increase takeaw...
Natural gas pipeline projects completed in 2024 increased takeaway capacity by approximately 6.5 Bcf/d in the U.S. ...

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Natural gas-fired electricity generation during Texas cold snap just shy of record high @EIAgov #pipelines #natgas #naturalgas #energy #winter #fuel #txlege #electricity #coldsnap #Texas bit.ly/4bYDhOI

ERCOT hourly natural gas-fired electricity generation (Feb 18-22, 2025)
gigawatts (GW) Feb 18 Feb 19 Feb 20 Feb 21 Feb 22
cold snap begins Feb 20, 9 a.m. CT 43.8 GW

eia

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EIA: Pipeline companies deliver most of the US electric power sector's natural gas @WorldPipelines @EIAgov #Texas #txlege #energy #LNG #natgas #naturalgas #fuel #economy #jobs #electric

Natural gas deliveries to each sector by distributor type (2023)
billion cubic feet per day

pipeline companies
local distribution companies (LDCs) with interstate pipelines
municipal companies
other

EIA: Pipeline companies deliver most of the US electric power sector's natural gas

From worldpipelines.com

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@TexasPipelines

Natural gas pipeline project completions increase takeaway capacity in producing regions @EIAgov #pipelines #Texas #infrastructure #energy #natgas #fuel #naturalgas #LNG bit.ly/3FyqUHT

Select natural gas pipeline projects and infrastructure (March 2024)

eia

- Production region
- Natural gas market hub
- LNG export terminal

Pipelines

- ADCC Pipeline
- Galler Express
- Gillis Access
- LEAP Phase 3
- Mattarhorn Express Pipeline
- Mountain Valley Pipeline
- Regional Energy Access Project
- Venice Extension Project
- Venice Pipeline
- Other natural gas pipeline

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Why energy executives believe natural gas is no longer "just a bridge fuel" @pipelines #permitting #natgas #naturalgas #Texas #energy #fuel #LNG #txlege

Why energy executives believe natural gas is no longer "just a bridge fuel"

From upstreamonline.com

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TPA NEWS BRIEFS

TPA LUNCH & LEARN



As part of its educational outreach activities, TPA held a Lunch & Learn at the Capitol on March 5 to educate legislators and their staff about issues vital to the midstream industry. The Association's primers on pipelines were very helpful in sharing important industry information and insight.

TPA TESTIFIES TO ENERGY COMMITTEE



TPA President Thure Cannon testified on March 3 to the House Committee on Energy Resources to discuss the vital importance of the midstream industry to the state of Texas and the nation. "Pipelines continue to be the safest and most reliable way to transport hydrocarbons," Cannon told the Committee. "We are also proud of our economic impact to the state, including sustaining 234,000 well-paying jobs." His testimony is [at the 01:54 mark](#).

TPA 2025/26 BOARD MEETINGS

Thursday, April 10, 2025

Austin, AT&T Conference Center

Friday, July 11, 2025

Hyatt Regency Lost Pines Resort and Spa

October 2025

TBD

Friday, Jan. 23, 2026

C. Baldwin in Houston

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