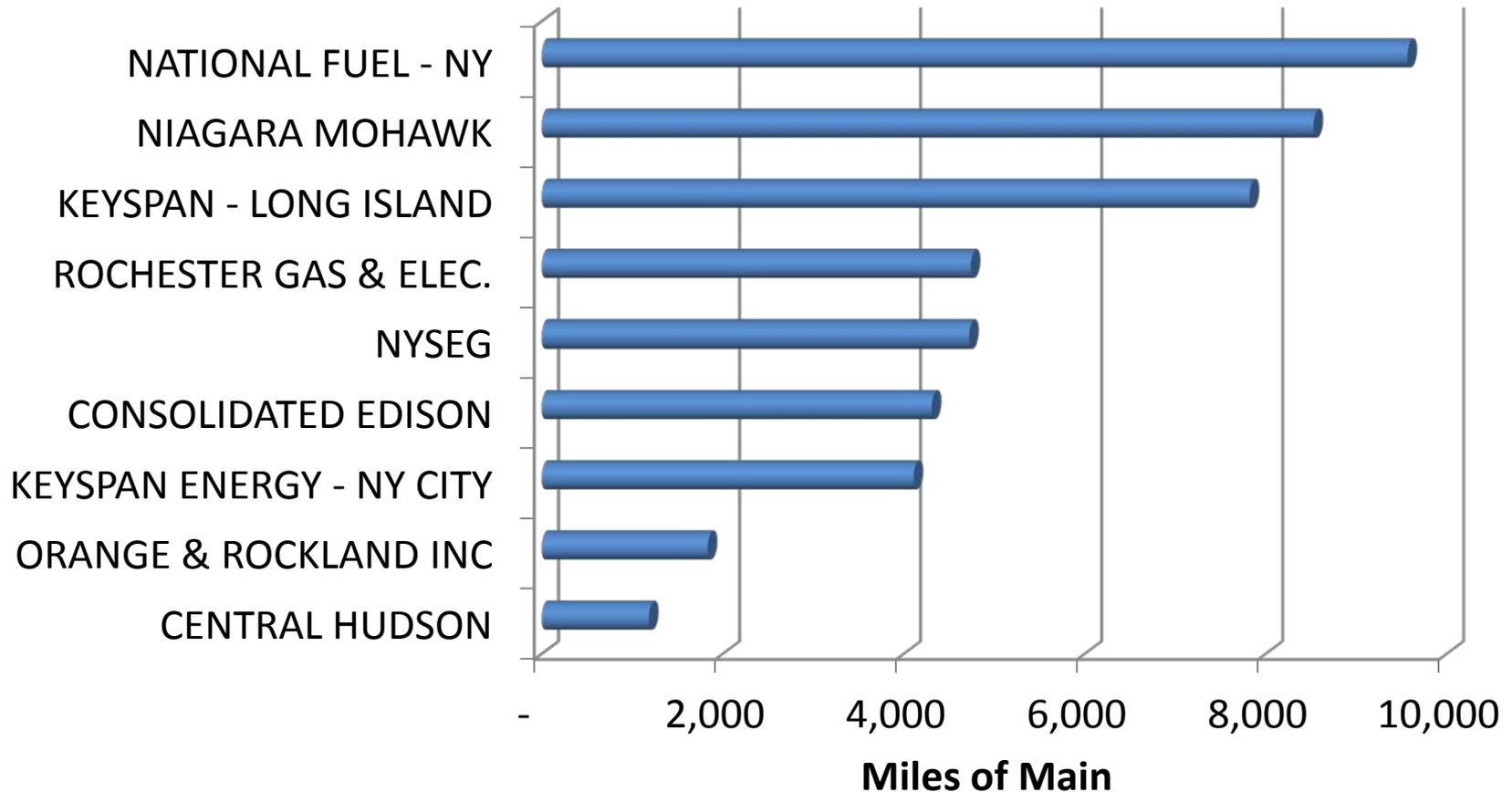
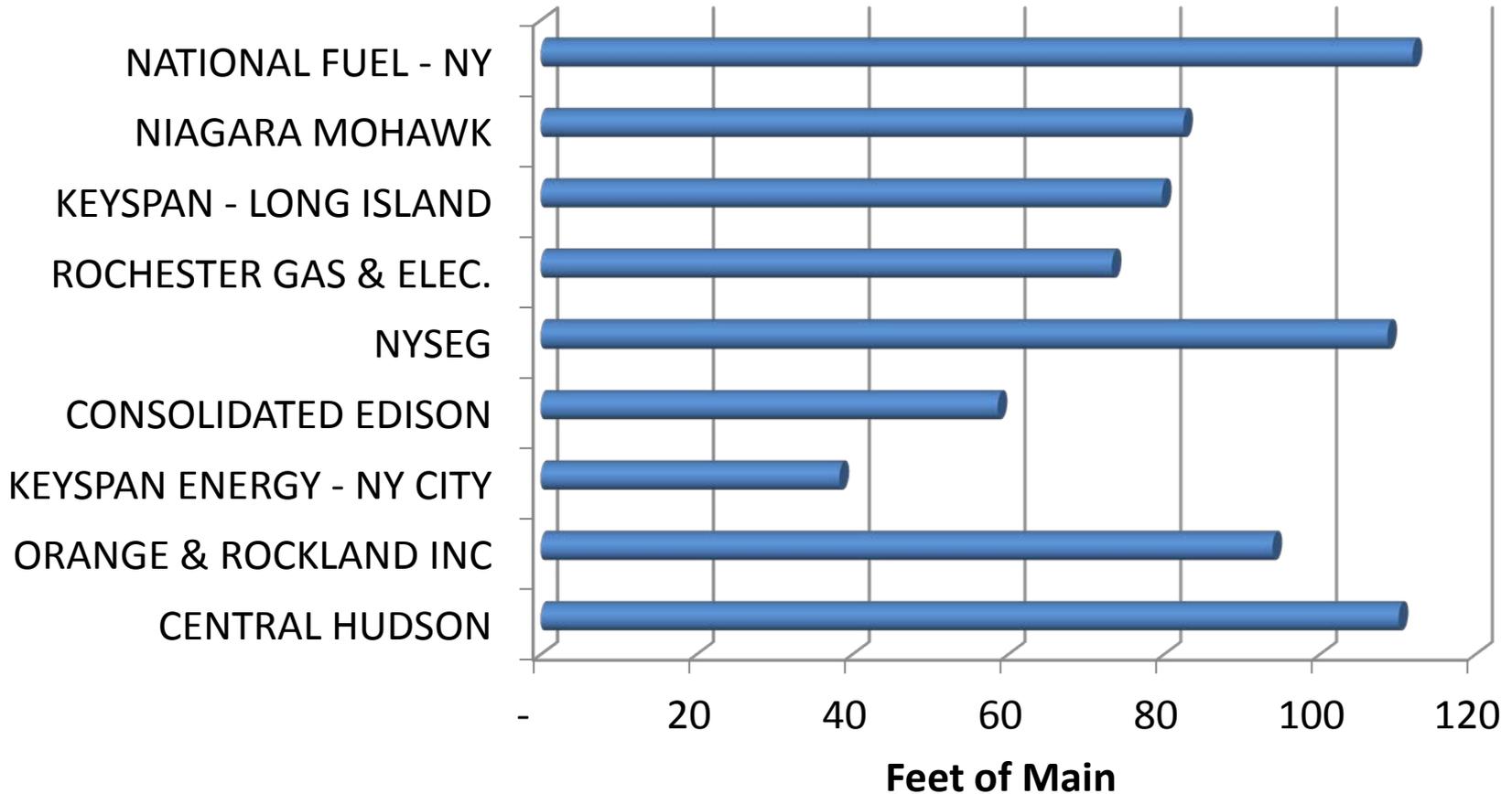


National Fuel Gas Distribution Corporation

Miles of Distribution Main PHMSA

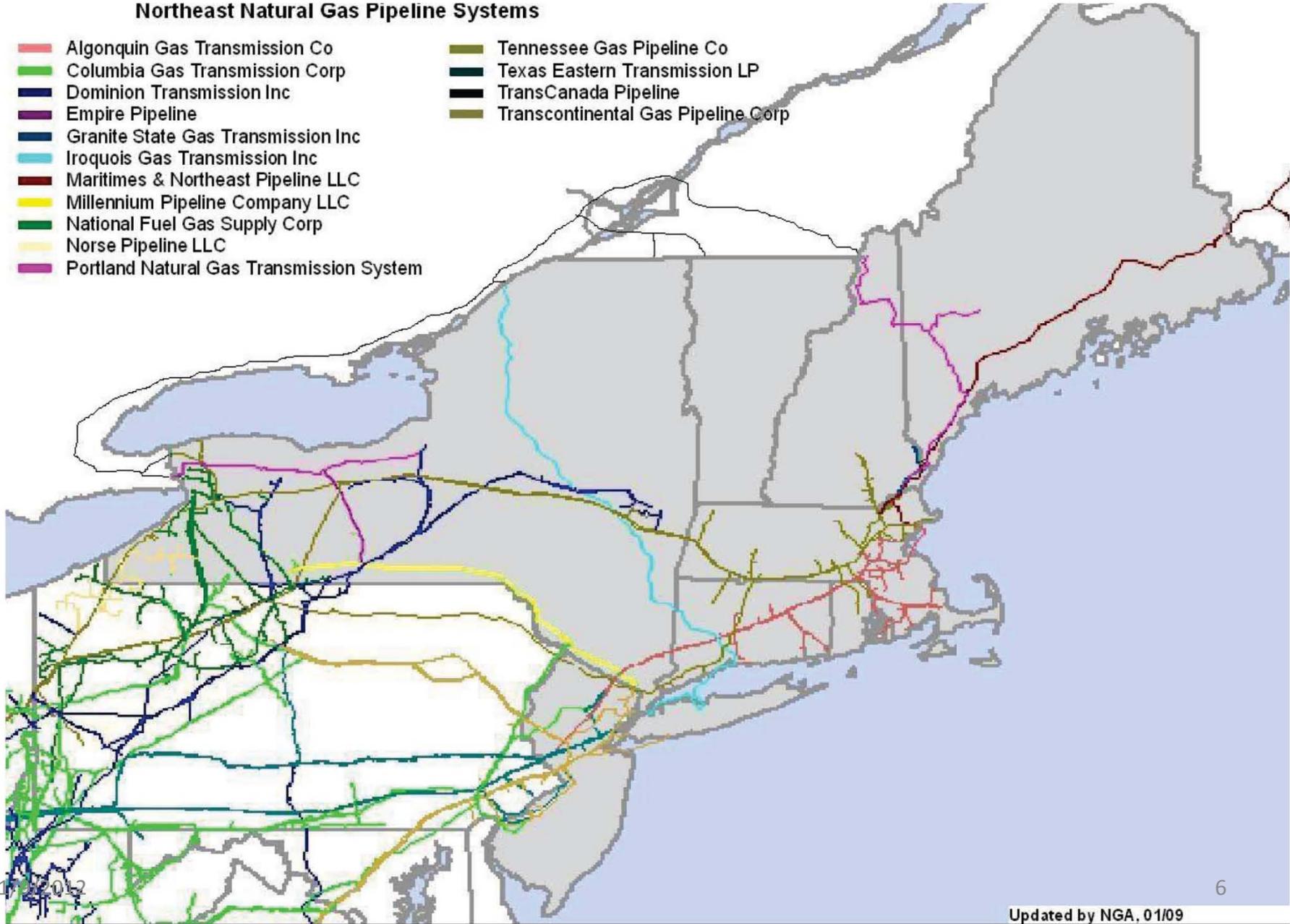


Feet of Main Per Service Line

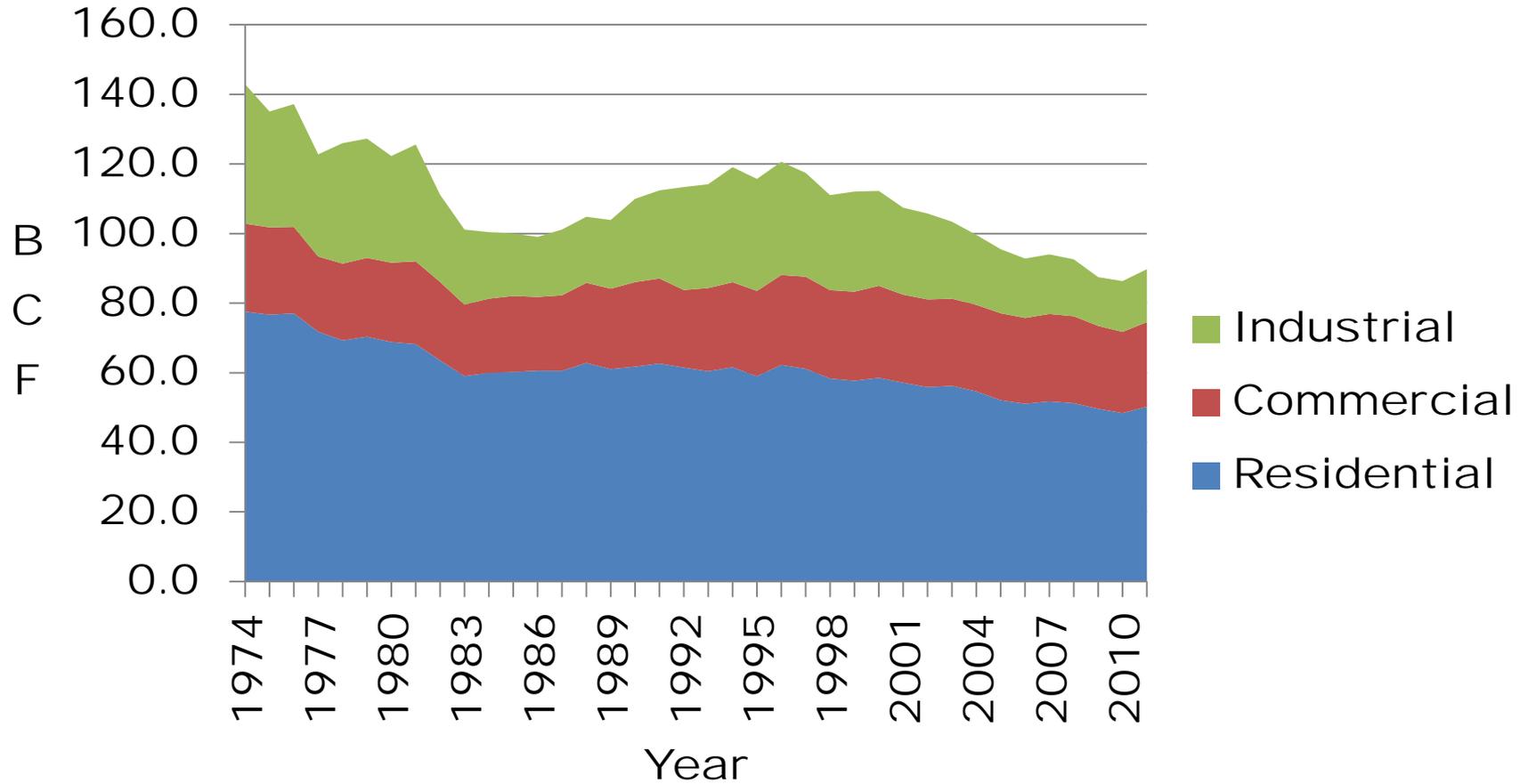


Northeast Natural Gas Pipeline Systems

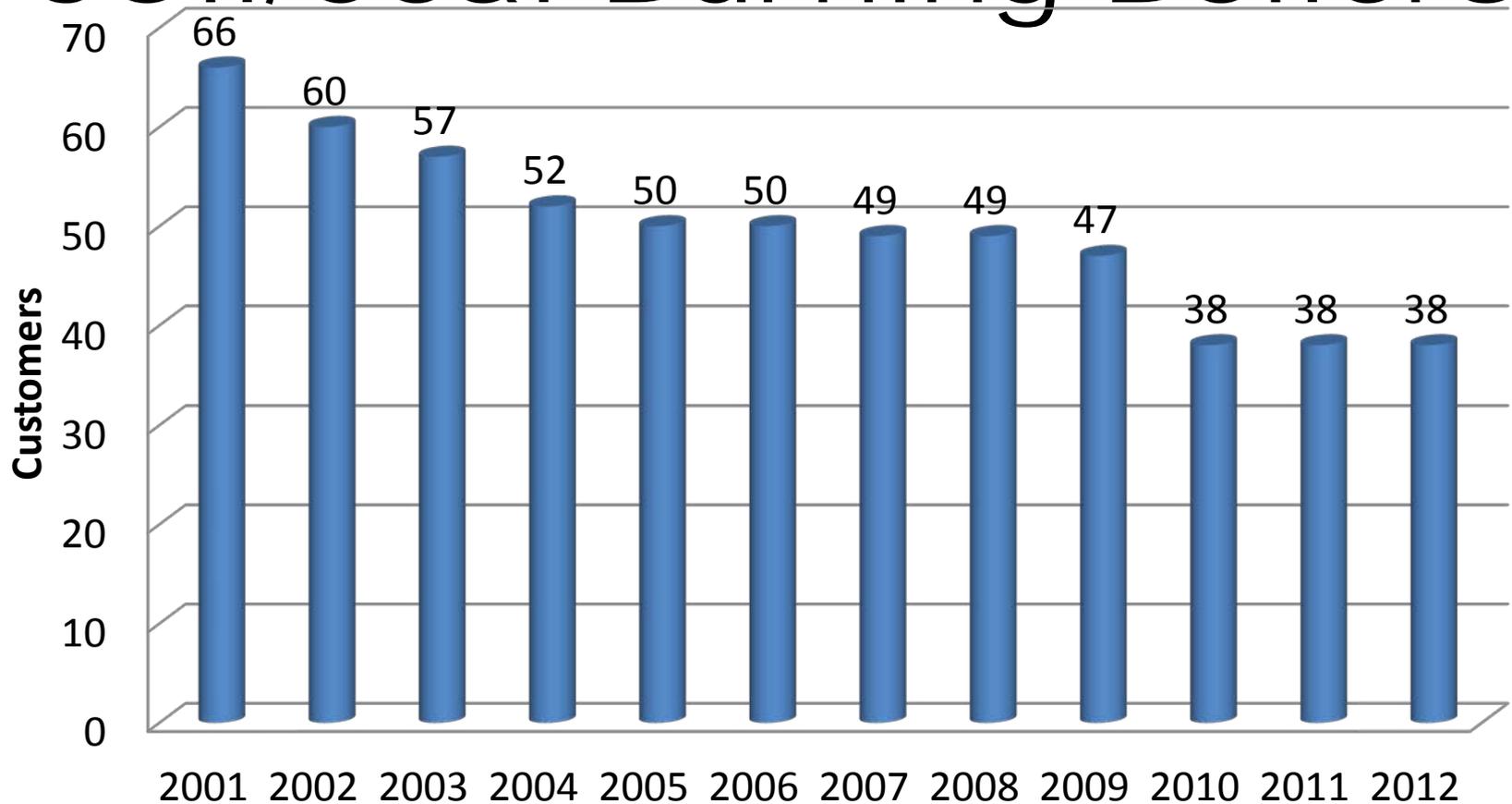
- | | |
|--|--|
|  Algonquin Gas Transmission Co |  Tennessee Gas Pipeline Co |
|  Columbia Gas Transmission Corp |  Texas Eastern Transmission LP |
|  Dominion Transmission Inc |  TransCanada Pipeline |
|  Empire Pipeline |  Transcontinental Gas Pipeline Corp |
|  Granite State Gas Transmission Inc | |
|  Iroquois Gas Transmission Inc | |
|  Maritimes & Northeast Pipeline LLC | |
|  Millennium Pipeline Company LLC | |
|  National Fuel Gas Supply Corp | |
|  Norse Pipeline LLC | |
|  Portland Natural Gas Transmission System | |



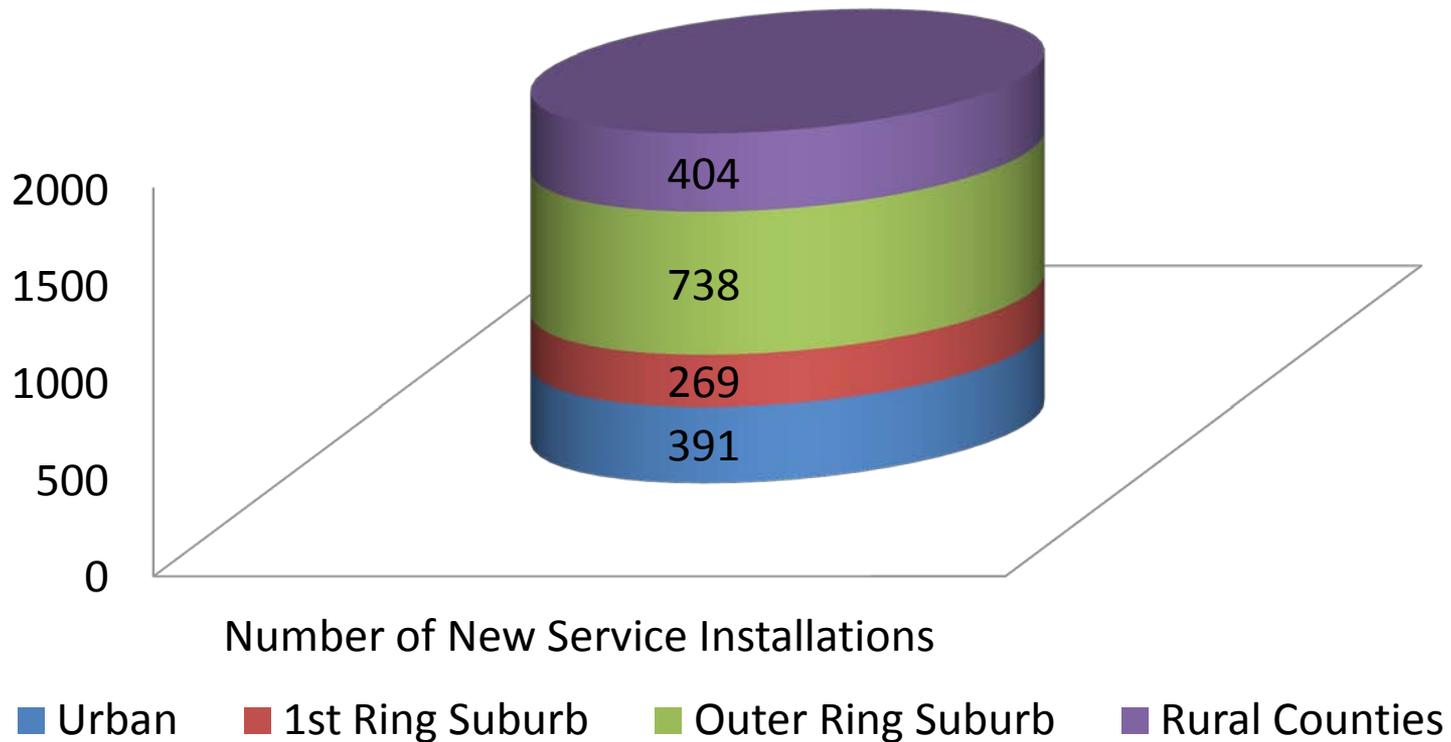
Annual Throughput - New York Division



Number of Large Customers with #6 Oil/Coal Burning Boilers

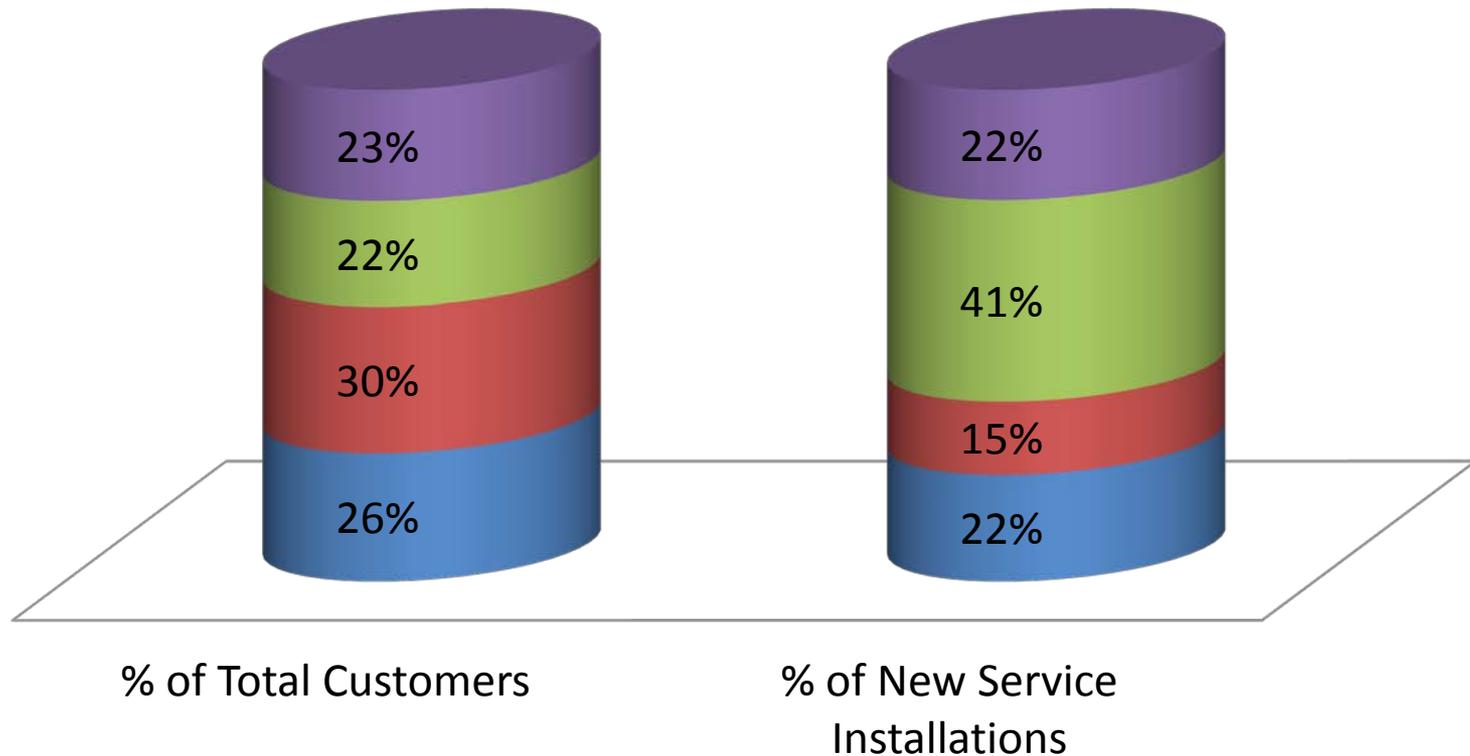


Location and Number of New Service Line Installations - 2012

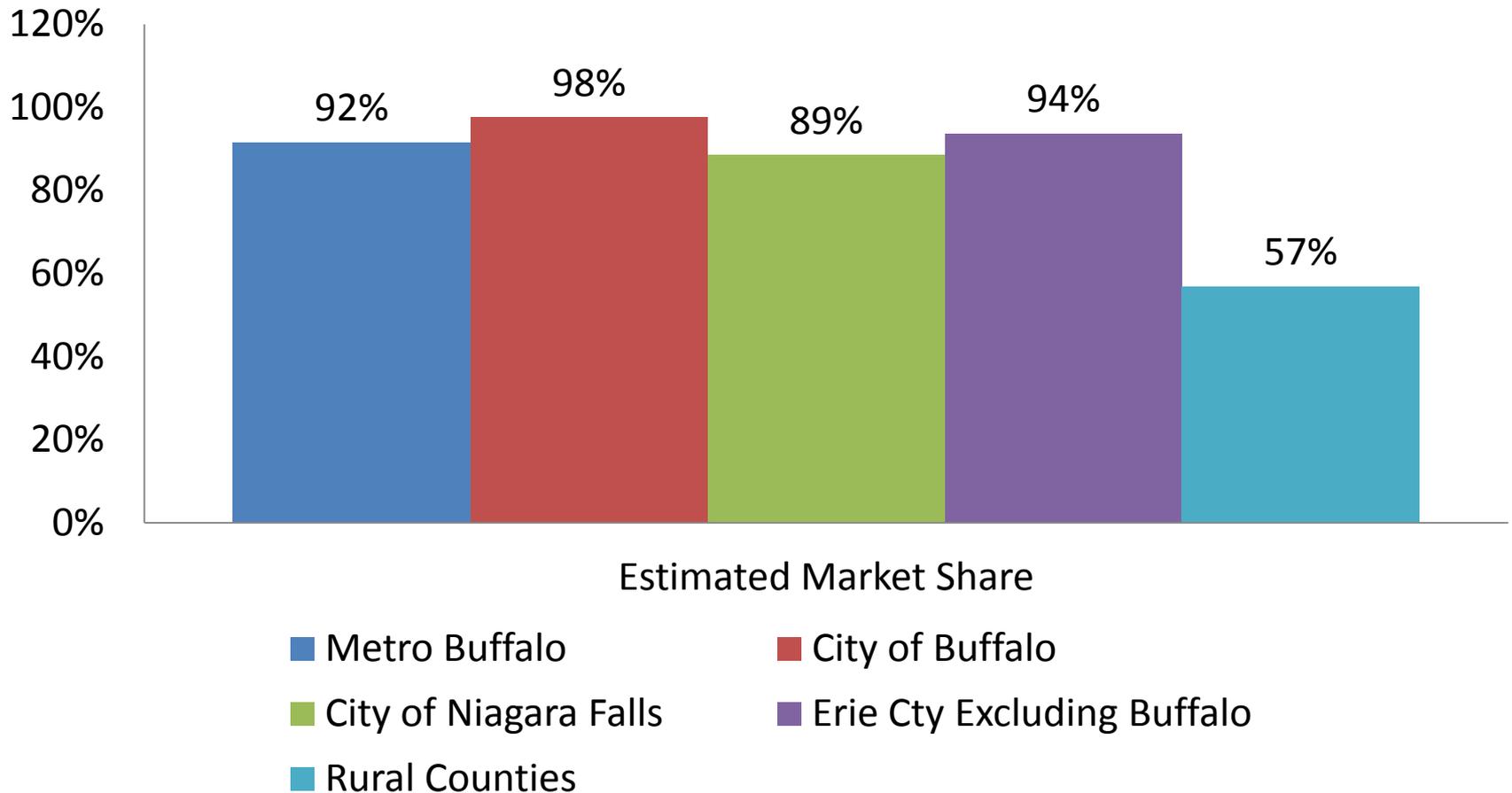


Location of: NFG Customers & New Service Installations

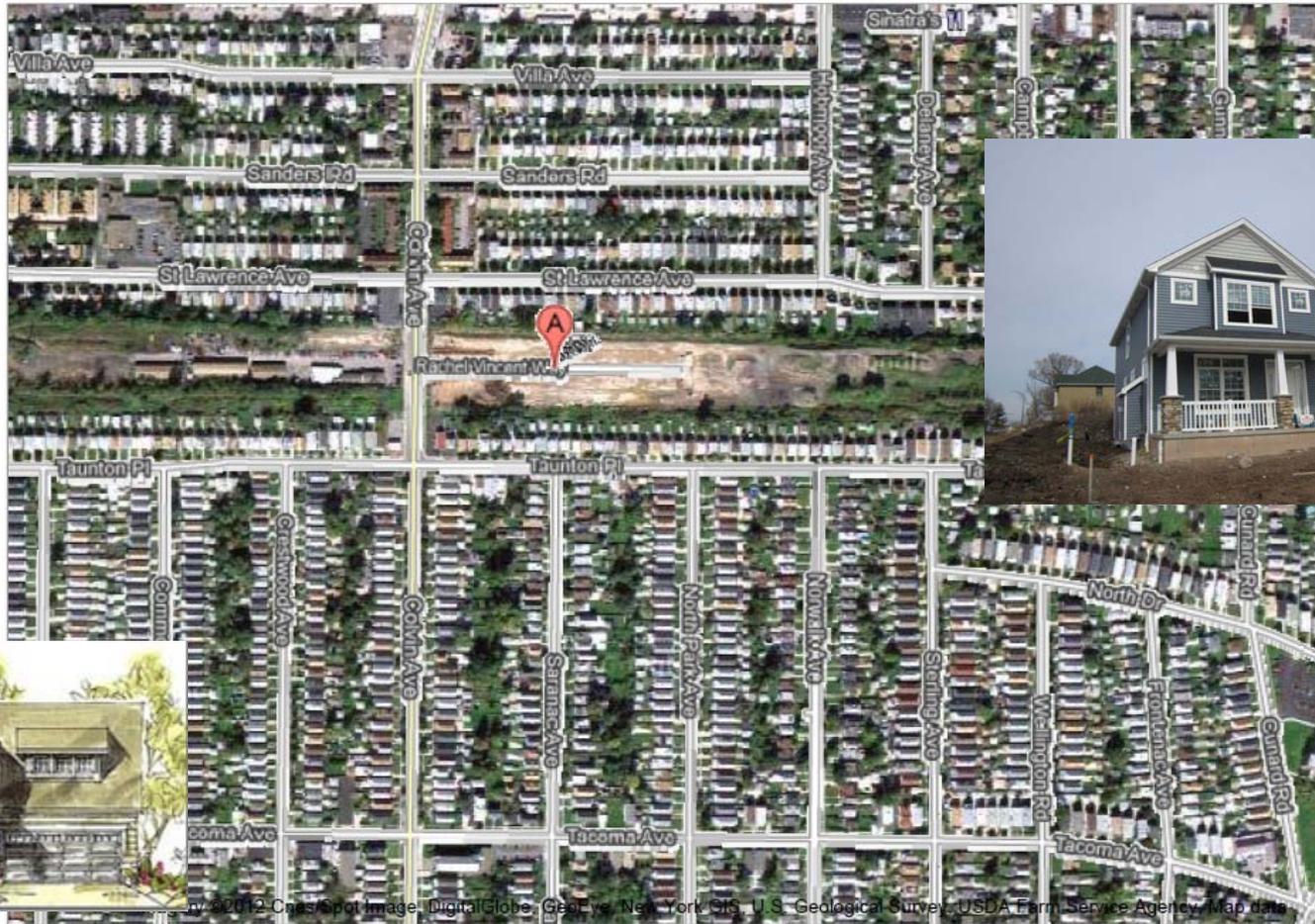
■ Urban ■ 1st Ring Suburb ■ Outer Ring Suburb ■ Rural Counties



Residential Heating Market Share

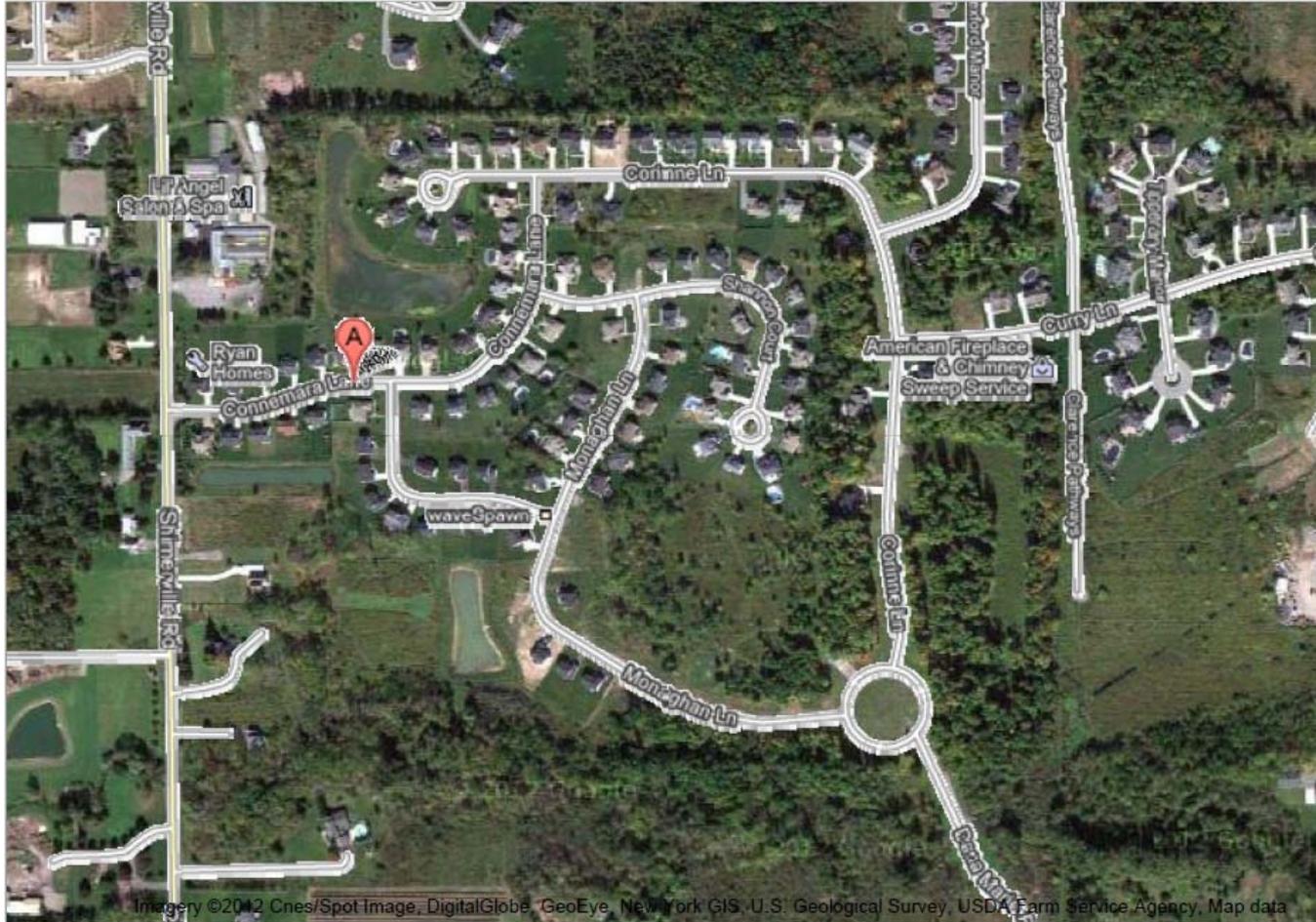


Urban New Service Opportunity

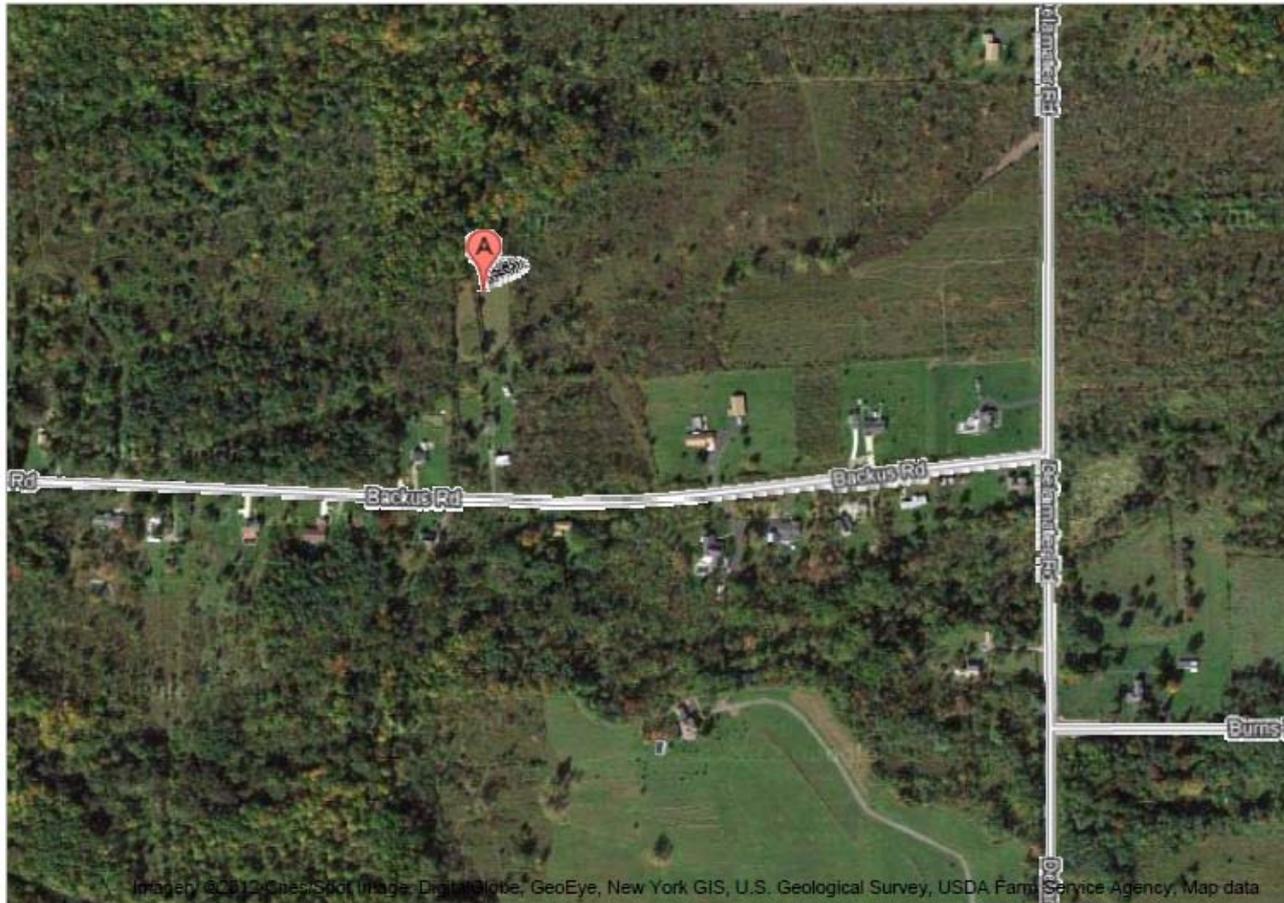


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Suburban New Service Opportunity



Rural New Service Opportunity



Strengths of Existing Procedures

- 100 ft rule in metro area.
- Developer Agreements
- Area Development Program

Challenges of Current Procedures Rural Areas

- Expansion rules add complexity.
- No single developer to work with.

Opportunities to Explore

- Rates for higher investment needs of rural/suburban areas.
- Entity to step into developer role.
- Bundle Projects.