










PJM Gas Electric Coordination General Update

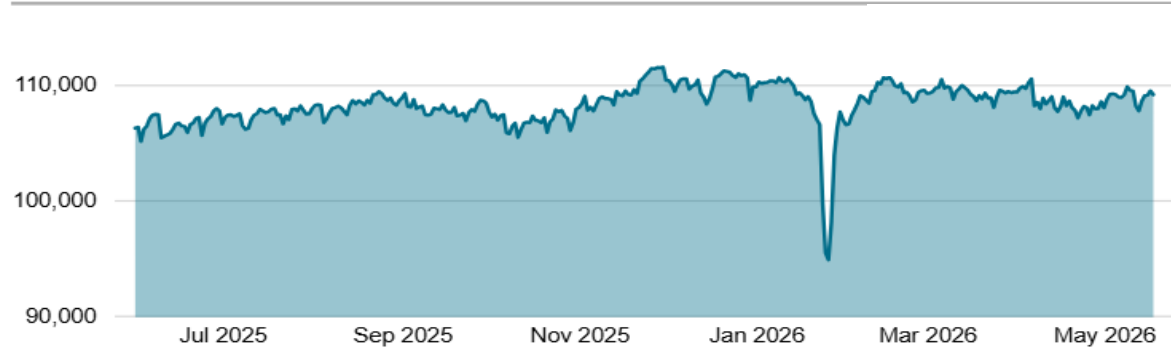
PJM Electric Gas Coordination
Subcommittee

May 26, 2026

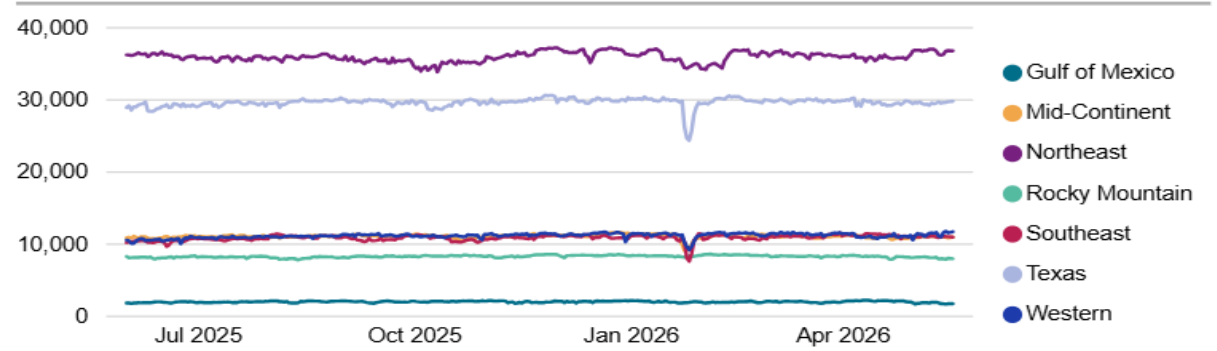
- 1** Natural Gas Market Fundamentals
- 2** Natural Gas Expansion Projects in PJM
- 3** Day Ahead Market Timing Survey
- 4** Gas Electric Coordination Issue Tracking

Fundamentals	Compared to Last Year
Gas Price	
Gas Production	
Gas Storage	
Coal Price	
Coal Production	
Oil Price	
Oil Production	

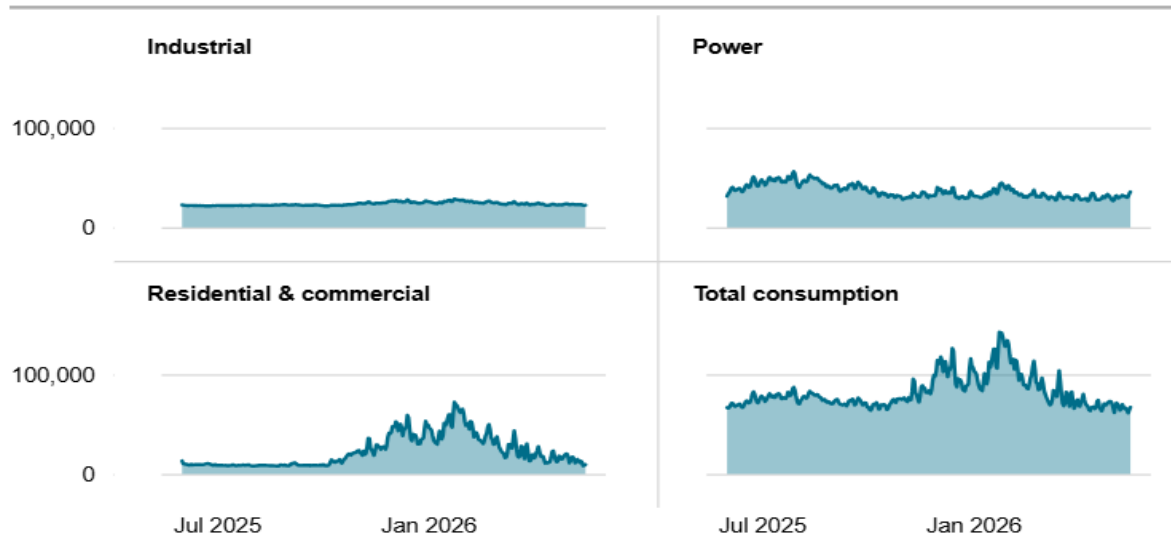
Dry gas production (MMcf/d)



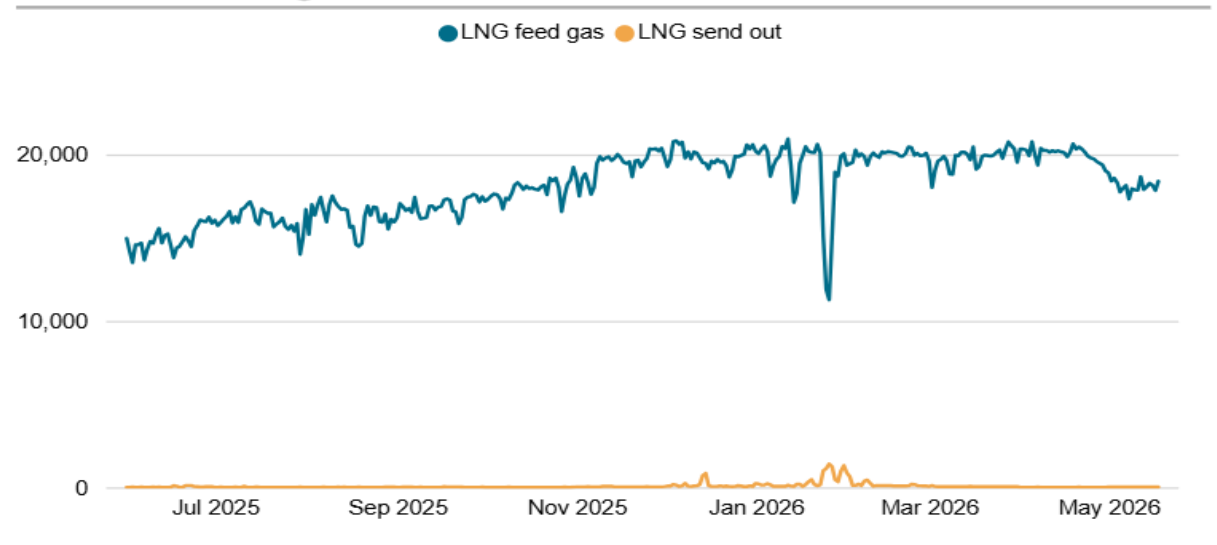
Production by region (MMcf/d)



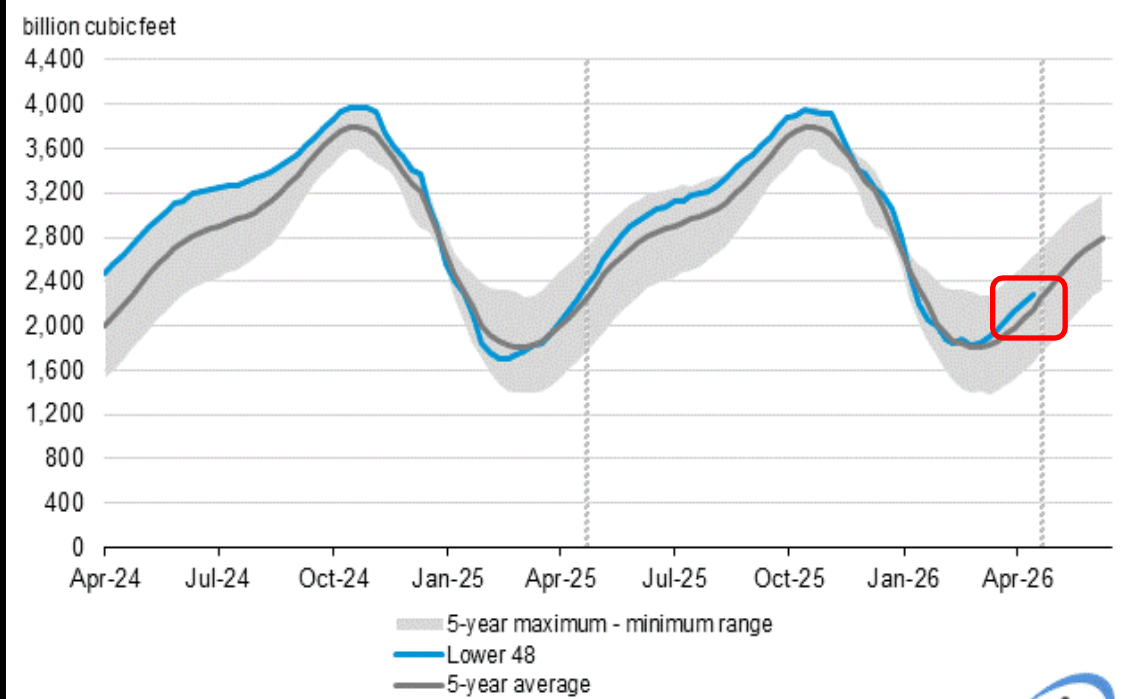
Consumption by sector (MMcf/d)



LNG activity (MMcf/d) ⓘ



Working gas in underground storage compared with the 5-year maximum and minimum



Data source: U.S. Energy Information Administration
 Note: The shaded area indicates the range between the historical minimum and maximum values for the weekly series from 2021 through 2025. The dashed vertical lines indicate current and year-ago weekly periods.

Inventory levels as of 5/8/26

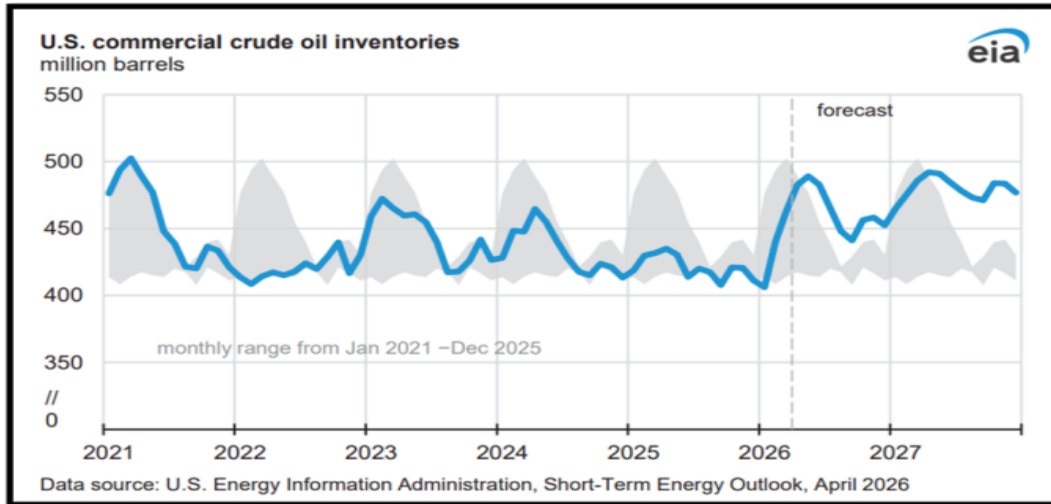
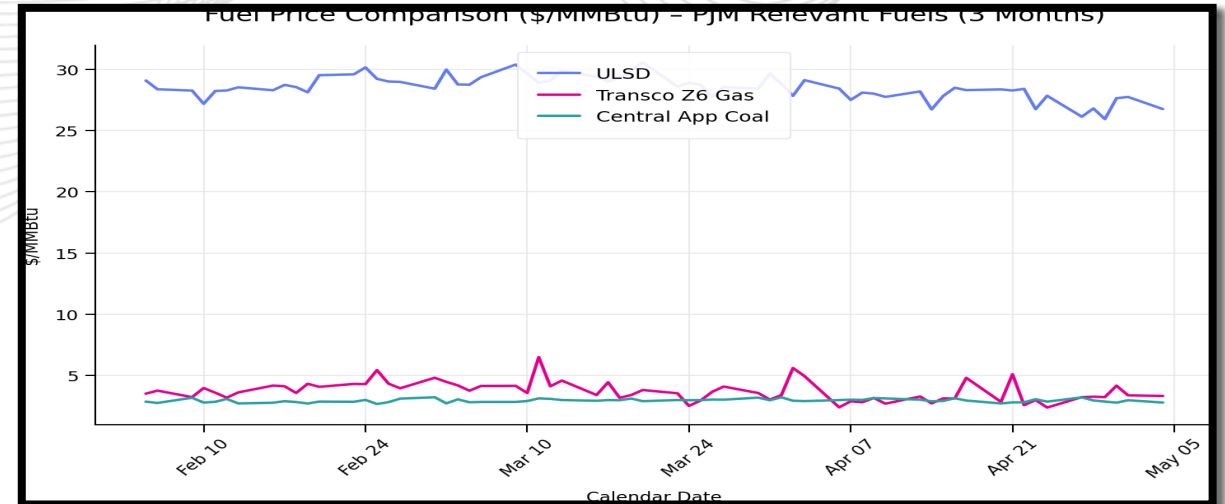
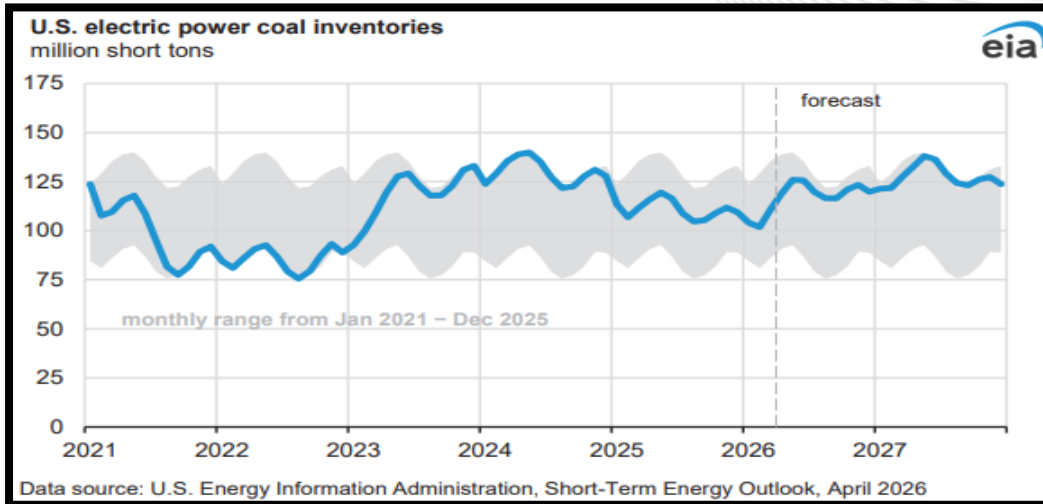
Working gas in underground storage, Lower 48 states

[Summary text](#) [CSV](#) [JSON](#)

Region	Stocks billion cubic feet (Bcf)				Historical Comparisons			
	05/08/26		05/01/26		Year ago (05/08/25)		5-year average (2021-25)	
	Bcf	% change	Bcf	% change	Bcf	% change	Bcf	% change
East	388	-0.8	361	27	391	0.5	386	0.5
Midwest	476	0.0	452	24	476	-0.8	480	-0.8
Mountain	206	12.0	203	3	184	44.1	143	44.1
Pacific	279	18.2	275	4	236	36.1	205	36.1
South Central	941	-1.1	914	27	951	0.6	935	0.6
Salt	285	-6.9	273	12	306	0.4	284	0.4
Nonsalt	656	1.7	641	15	645	0.8	651	0.8
Total	2,290	2.3	2,205	85	2,239	6.5	2,150	6.5

Totals may not equal sum of components because of independent rounding

- Total U.S. storage is 6.5% above the 5-yr average
- Total U.S. storage is 2.3% above last year's level
- Eastern storage fields are 0.5% above the 5-yr average
- Midwest storage fields are 0.8% below the 5-yr average



- Regional coal and oil inventories remain strong
- Fuel oil prices driven by international volatility, running about 6x natural gas and coal price
- We will be going out with a fuels data request in early June to assess summer inventory

U.S. natural gas prices continue to remain insulated from Middle East conflict, as opposed to diesel prices which are more closely tied to world market.

NY Harbor ultra low sulfur diesel running 6x natural gas and coal price

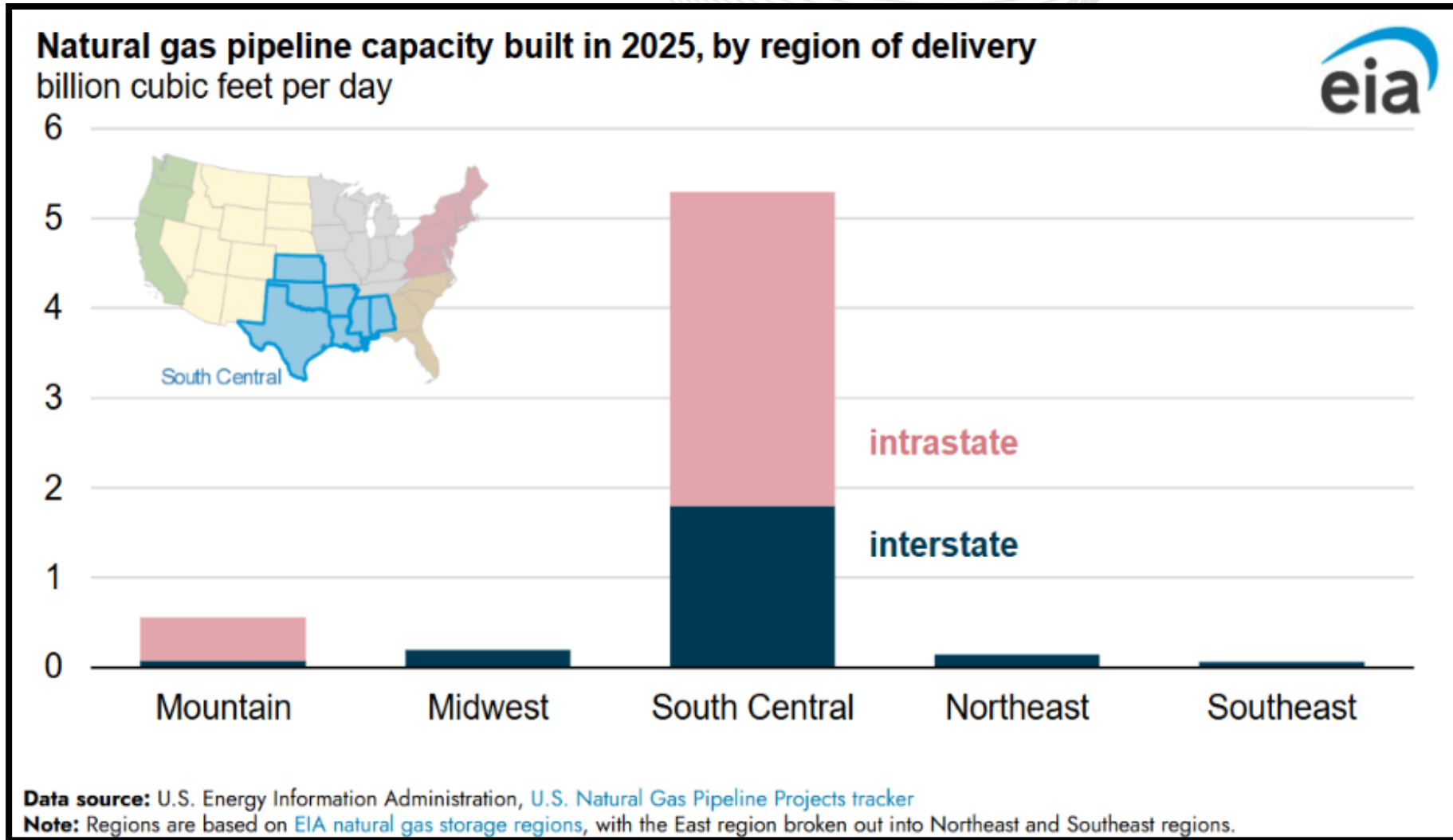
Gas storage inventory has recovered above the 5-year average and last year's level.

Eastern and Midcontinent storage has seen the most significant build since the large deficits at the end of winter

Gas production and LNG exports have retreated slightly as pipeline maintenance season takes hold

PJM Gas Electric team conducting monthly outage coordination calls with pipelines.

Most impacts from maintenance/pigging have been localized with minimal generation impacts



The vast majority of pipelines built in 2025 were focused on deliveries from production regions to the South Central area feeding the rapidly growing LNG export market.



Proposed Pipeline Expansion Projects In PJM

Project	Type	Primary PJM Zones Impacted	Flow Direction / Mechanism	Market Impact Summary	Estimated In Service
Appalachia Supply Project (TC Energy)	Greenfield / large-scale expansion (0.8 bcf/day)	DOM, APS, ATSI, AEP	Moves large volumes out of Appalachia into load centers	Directly supports PJM thermal demand growth ; key for DOM tightening	2030
Appalachian Reliability Project (EQT / EGT)	Compression + debottlenecking (0.55 bcf/day)	APS, ATSI, AEP	Improves intra-basin deliverability (SW PA / WV)	Reduces in-basin constraints , flattens PJM West basis	Q22028
MVP Boost (MVP)	Expansion (incremental capacity) (0.6 bcf/day)	DOM	Southbound gas from WV → VA	Critical supply relief for Dominion zone growth	Q32028
Columbia Gas Expansions (NKY Gate, etc.)	System upgrades (looping/compression) (0.3 bcf/day)	AEP, DAY, DEOK, ATSI	Enhances OH Valley → Midwest / PJM flows	Improves liquidity + convergence in PJM West	2028
Texas Gas – Carnation (OH)	Compression-led expansion (0.2 bcf/day)	ATSI, AEP, DAY	Moves gas westward into Midwest markets	Supports Appalachia takeaway , stabilizes PJM West pricing	2028

- PJM is **NOT** proposing to move the current timing of the Day Ahead market
- Survey is designed to gauge interest level from stakeholders and identify any potential reliability benefits
- Premise is based on the timing of daily gas spot trading occurring generally between 0900 and 1200 eastern time
- Is there a benefit to generators, especially during extreme cold conditions, of knowing their commitment prior to spot market trading for next day gas?



Mapping of Gas-Electric Coordination Issues

Topic	Current PJM Stakeholder Process	Other Industry Initiatives
Advanced Scheduling of Generating Resources	MIC Issue Charge/Problem Statement: Resource Scheduling Prior to the Day Ahead Energy Market	
Gas procurement and compensation to meet reserve requirement	RCSTF: PJM Reserve Market enhancements including investigating the alignment of offer structure with fuel procurement practices	
Lack of adequate gas infrastructure capacity to meet demand and flexibility requirements		NARUC GEAR and NPC Report Recommendations
Weekend Gas Market and Dispatchability Challenges	Tied to “Advanced Scheduling of Resources”	NARUC GEAR Report Recommendations
Extending Generating Unit Runs Beyond Original Commitment	Monitoring Analytics proposal from Electric Gas Coordination Senior Task Force	
Electric and Gas Day Misalignment		
Emergency Communications Between Electric and Gas Industries		IRC Electric Gas Coordination Task Force
Electric and Gas System Planning Collaborative		EIPC Electric Gas Task Force

Facilitator:

Andrew Gledhill,
Andrew.Gledhill@pjm.com

Secretary:

Nicolae Dumitriu,
Nicolae.Dumitriu@pjm.com

SME/Presenter:

Brian Fitzpatrick,
Brian.Fitzpatrick@pjm.com

EGC Subcommittee



Member Hotline

(610) 666-8980

(866) 400-8980

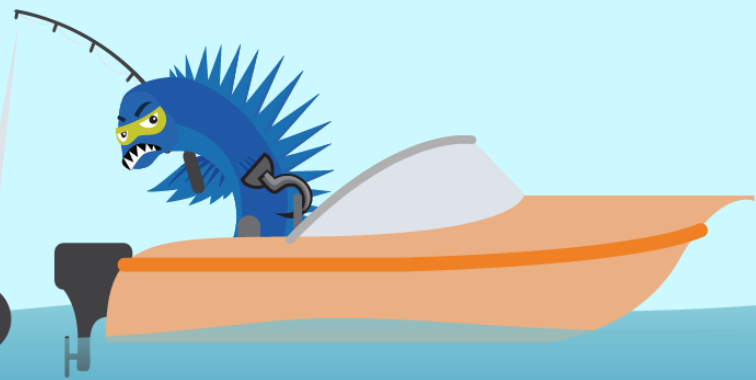
custsvc@pjm.com

**PROTECT THE
POWER GRID**

**THINK BEFORE
YOU CLICK!**



**BE ALERT TO
MALICIOUS PHISHING
EMAILS**



**Report suspicious email activity to PJM.
Call (610) 666-2244 or email it_ops_ctr_shift@pjm.com**