

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:
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Kevin R. Huntsman
MASTIO
3300 Dale Ave., Suite 109
St. Joseph, MO 64506
Phone: (816) 364-6200
khuntsman@mastio.com

Press Release: MASTIO publishes the 29th Edition Natural Gas Pipeline Report.

MASTIO is pleased to announce the publication of the 2025, 29th Edition of the industry-wide Natural Gas Pipeline Customer Value & Loyalty Benchmarking Study. The study, released to subscribers in late February, provides comprehensive insights into interstate, intrastate, and Canadian pipelines.

Based on 745 in-depth interviews with industrial customers, local distribution companies (LDCs), independent power producers, producers, and marketers, this study evaluates pipeline performance across 29 key attributes. These include responsiveness, after-hours support, reliability of firm gas transportation, problem resolution, overall company performance, and likelihood of recommending a pipeline.

In addition to quantitative metrics, the study captures qualitative insights through open-ended questions. Respondents share their perspectives on critical decision-making factors, including:

- “Besides price, what is the most important factor you consider when selecting a transportation provider?”
- “What has been your biggest disappointment with each of your pipelines over the past 12 months?”

This comprehensive analysis helps pipeline operators understand customer expectations, identify areas for improvement, and enhance overall service quality.

The most crucial issue to transporters of natural gas in the latest study is firm gas transportation is highly reliable.

Top 5 Customer Needs

1. Firm gas transportation is highly reliable.
2. Scheduled gas volumes are accurate.
3. Accuracy of invoices.
4. Communicates in an honest and forthright manner.
5. Representatives are accessible when needed.

Source: MASTIO 2025 Natural Gas Transportation Customer Value Study4

The study findings are divided into the following four groups located on the proceeding pages:

- **Mega Pipelines**
- **Major Pipelines**
- **Regional Pipelines**
- **Major Organizational Groups**

MASTIO QUALITY AWARDS

The criterion MASTIO uses to recognize the best pipelines are:

- 1) Determined by the pipelines with the highest overall Customer Value Weighted Quality (Benefit) Score that have also met a minimum of 30 ratings.

Please note that companies need to meet the above criteria to be considered for the Mastio Quality Award.

MEGA PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Mega Pipeline Group.

ANR Pipeline Co.	Panhandle Eastern Pipe Line Co.
Canadian Mainline	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Tallgrass Interstate Gas Trans.
Eastern Gas Trans. & Storage	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Gulf South Pipeline Co.	Texas Gas Transmission
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Northwest
Northern Natural Gas Co.	Williams Gas Pipeline-Transco

Mega Pipeline Group – The Mega Pipeline Group consists of pipelines with at least 3,500 miles of transportation pipe and deliveries of at least 1 trillion CF (TCF).

The following Mega pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Mega Pipeline Group	Northern Natural Gas Co.	E Eastern Gas Trans. & Storage El Paso Natural Gas Co. Northern Natural Gas Co. Tennessee Gas Pipeline Co. Williams Gas Pipeline-Northwest

MAJOR PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Major Pipeline Group.

ANR Pipeline Co.	Northern Natural Gas Co.
Canadian Mainline	Nova Gas Transmission Line
Colorado Interstate Gas Co.	Panhandle Eastern Pipe Line Co.
Columbia Gas Transmission Corp.	Southern Natural Gas Co.
Columbia Gulf Transmission Co.	Southern Star Central
Eastern Gas Trans. & Storage	Tallgrass Interstate Gas Trans.
El Paso Natural Gas Co.	Tennessee Gas Pipeline Co.
Enable Gas Transmission	Texas Eastern Transmission Corp.
Florida Gas Transmission Co.	Texas Gas Transmission
Gulf South Pipeline Co.	Williams Gas Pipeline-Northwest
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Transco

Major Pipeline Index - The Major Pipeline Index consists of pipelines with at least 3,500 miles of transportation pipe and serves at least 3 states.

The following Major pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Pipeline Group	Northern Natural Gas Co.	Colorado Interstate Gas Co. Eastern Gas Trans. & Storage El Paso Natural Gas Co. Northern Natural Gas Co. Southern Star Central Tennessee Gas Pipeline Co. Williams Gas Pipeline-Northwest

REGIONAL PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Regional Pipeline Group.

BC Pipeline	National Fuel Gas Supply Corp.
California Gas Transmission	Northern Border Pipeline Co.
Carolina Gas Transmission	ONEOK Gas Transportation Co.
East Tennessee Natural Gas Co.	Rockies Express Pipeline
Enbridge Gas	Southern California Gas Co.
Gas Transmission Northwest	Trailblazer Pipeline Co.
Great Lakes Gas Transmission, Inc.	Transwestern Pipeline Co.
Iroquois Gas Transmission System L.P.	Vector Pipeline
Kern River Gas Transmission Co.	Viking Gas Transmission Co.
Midwestern Gas Transmission Co.	WBI Energy Transmission
MountainWest Overthrust Pipeline	Wyoming Interstate Co. Ltd.
MountainWest Pipeline	

Regional Pipeline Index - The Regional Pipeline Index consists of pipelines with less than 3,500 miles of transportation pipe and/or serves less than 3 states.

The following Regional pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Regional Pipeline Group	Kern River Gas Transmission Co.	Carolina Gas Transmission Kern River Gas Transmission Co. MountainWest Pipeline

MAJOR ORGANIZATIONAL PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Major Organization Group.

BHE Pipeline Group
Boardwalk Pipeline Group
DT Midstream Group
Enbridge Group
Energy Transfer Group
Kinder Morgan Group
ONEOK Partners Group
Tallgrass Energy Group
TC Energy Group
Williams Group

Major Pipeline Group Index – Includes the pipelines the parent company owns and operates.

The following Major Organizational pipeline groups met the Mastio Quality Award requirements.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Organizational Groups	BHE Pipeline Group	BHE Pipeline Group Williams Group

Legacy Indexes

The following MASTIO Customer Satisfaction Indexes are included for legacy purposes. MASTIO realizes many companies have relied on these indexes to benchmark their performance over the years. In light of the migration to Customer Value Analysis from traditional Customer Satisfaction, we feel the Customer Value Indexes provide a clearer picture of a company's performance relative to other companies. The Customer Value Index places a higher importance on price than the legacy Customer Satisfaction Index. Also, please note that awards are presented based on a company's performance on the CV Index.

Customer Satisfaction Index Mega Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.96
2	Eastern Gas Trans. & Storage	92.91
3	Williams Gas Pipeline-Northwest	89.62
4	El Paso Natural Gas Co.	88.02
5	Tennessee Gas Pipeline Co.	86.86
6	Southern Natural Gas Co.	85.31
7	Texas Eastern Transmission Corp.	84.27
8	ANR Pipeline Co.	82.19
9	Natural Gas Pipeline Co. of America	80.27
10	Columbia Gas Transmission Corp.	80.25
11	Williams Gas Pipeline-Transco	79.92
12	Tallgrass Interstate Gas Trans.	76.19

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Gulf South Pipeline Co.	83.62
Canadian Mainline	83.55
Panhandle Eastern Pipe Line Co.	82.88
Texas Gas Transmission	81.17

The *Mega Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe, serves at least 3 states, and deliveries of at least 1 trillion CF (TCF).

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Legacy Indexes

Customer Satisfaction Index Major Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.96
2	Eastern Gas Trans. & Storage	92.91
3	Williams Gas Pipeline-Northwest	89.62
4	El Paso Natural Gas Co.	88.02
5	Southern Star Central	87.01
6	Tennessee Gas Pipeline Co.	86.86
7	Colorado Interstate Gas Co.	86.26
8	Southern Natural Gas Co.	85.31
9	Texas Eastern Transmission Corp.	84.27
10	ANR Pipeline Co.	82.19
11	Natural Gas Pipeline Co. of America	80.27
12	Columbia Gas Transmission Corp.	80.25
13	Williams Gas Pipeline-Transco	79.92
14	Tallgrass Interstate Gas Trans.	76.19

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Florida Gas Transmission Co.	91.92
Columbia Gulf Transmission Co.	86.82
Gulf South Pipeline Co.	83.62
Canadian Mainline	83.55
Panhandle Eastern Pipe Line Co.	82.88
Texas Gas Transmission	81.17
Enable Gas Transmission	79.17
Nova Gas Transmission Line	73.54

The *Major Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe and serves at least three states.

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Legacy Indexes

Customer Satisfaction Index Regional Pipe

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	98.12
2	Carolina Gas Transmission	93.57
3	MountainWest Pipeline	89.26
4	Rockies Express Pipeline	84.68
5	Northern Border Pipeline Co.	83.90

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
National Fuel Gas Supply Corp.	92.72
California Gas Transmission	90.92
MountainWest Overthrust Pipeline	90.05
WBI Energy Transmission	87.81
Enbridge Gas	87.63
Vector Pipeline	86.87
East Tennessee Natural Gas Co.	86.71
Iroquois Gas Transmission System L.P.	86.43
Wyoming Interstate Co. Ltd.	85.73
Midwestern Gas Transmission Co.	84.83
Great Lakes Gas Transmission, Inc.	81.41
Viking Gas Transmission Co.	81.40
Transwestern Pipeline Co.	80.92
Southern California Gas Co.	80.52
ONEOK Gas Transportation Co.	80.32
Trailblazer Pipeline Co.	79.91
BC Pipeline	79.30
Gas Transmission Northwest	69.04

The *Regional Pipeline Index* consists of pipelines with less than 3,500 miles of transportation pipe or serves less than three states.

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	98.12
2	Northern Natural Gas Co.	93.96
3	Carolina Gas Transmission	93.57
4	Eastern Gas Trans. & Storage	92.91
5	Williams Gas Pipeline-Northwest	89.62
6	MountainWest Pipeline	89.26
7	El Paso Natural Gas Co.	88.02
8	Southern Star Central	87.01
9	Tennessee Gas Pipeline Co.	86.86
10	Colorado Interstate Gas Co.	86.26
11	Southern Natural Gas Co.	85.31
12	Rockies Express Pipeline	84.68
13	Texas Eastern Transmission Corp.	84.27
14	Northern Border Pipeline Co.	83.90
15	ANR Pipeline Co.	82.19
16	Natural Gas Pipeline Co. of America	80.27
17	Columbia Gas Transmission Corp.	80.25
18	Williams Gas Pipeline-Transco	79.92
19	Tallgrass Interstate Gas Trans.	76.19

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
National Fuel Gas Supply Corp.	92.72
Florida Gas Transmission Co.	91.92
MountainWest Overthrust Pipeline	90.05
WBI Energy Transmission	87.81
Vector Pipeline	86.87
Columbia Gulf Transmission Co.	86.82
East Tennessee Natural Gas Co.	86.71
Iroquois Gas Transmission System L.P.	86.43
Wyoming Interstate Co. Ltd.	85.73
Midwestern Gas Transmission Co.	84.83
Gulf South Pipeline Co.	83.62
Panhandle Eastern Pipe Line Co.	82.88
Great Lakes Gas Transmission, Inc.	81.41
Viking Gas Transmission Co.	81.40
Texas Gas Transmission	81.17
Transwestern Pipeline Co.	80.92
Trailblazer Pipeline Co.	79.91
Enable Gas Transmission	79.17
Gas Transmission Northwest	69.04

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas	87.63
2	Canadian Mainline	83.55
3	BC Pipeline	79.30
4	Nova Gas Transmission Line	73.54

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	90.92
2	Southern California Gas Co.	80.52
3	ONEOK Gas Transportation Co.	80.32

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	BHE Pipeline Group	94.68
2	Williams Group	86.43
3	Kinder Morgan Group	85.52
4	Enbridge Group	84.30
5	Energy Transfer Group	83.62
6	DT Midstream Group	82.62
7	Boardwalk Pipeline Group	82.15
8	Tallgrass Energy Group	80.05
9	TC Energy Group	79.05

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
ONEOK Partners Group	81.24

The *Major Organizational Groups Index* consists of organizational scores compiled from the combined scores of their transportation subsidiaries.

The following table lists the entities that comprise the *Major Organizational Groups Index*.

	Subsidiaries		
BHE Pipeline Group	Carolina Gas Transmission	Eastern Gas Transmission & Storage	Kern River Gas Transmission.
	Northern Natural Gas Co.		
Boardwalk Pipeline Group	Gulf South Pipeline	Texas Gas Transmission	
DT Midstream	Guardian Pipeline	Midwestern Gas Transmission	Viking Gas Transmission
Enbridge Group	Algonquin Gas Transmission	BC Pipeline	East Tennessee Natural Gas
	Enbridge Gas	Nexus Gas Transmission	Texas Eastern Transmission
Energy Transfer Group	Enable Gas Transmission Co.	Enable Mississippi River Trans.	Enable Oklahoma Intrastate Trans.
	Enable Midstream Partners	Energy Transfer Fuel Co.	ETC Tiger Pipeline
	Florida Gas Transmission	Houston Pipe Line Co.	Oasis Pipeline Co.
	Panhandle Eastern Pipe Line	Sea Robin Pipeline Co.	Transwestern Pipeline Co.
Kinder Morgan Group	Trunkline Gas Co.		
	Cheyenne Plains Gas Pipeline	Colorado Interstate Gas Co.	El Paso Natural Gas Co.
	Kinder Morgan Texas Pipeline	Midcontinent Express Pipeline	Natural Gas Pipeline Co. of America
	Southern Natural Gas Co.	Tennessee Gas Pipeline Co.	TransColorado Gas Transmission
ONEOK Partners Group	Wyoming Interstate Co.		
ONEOK Partners Group	ONEOK Gas Transportation	ONEOK Westex	
	Rockies Express Pipeline	Ruby Pipeline	Tallgrass Interstate Gas Trans.
Tallgrass Energy Group	Trailblazer Pipeline Co.		
	ANR Pipeline Co.	Columbia Gas Transmission	Columbia Gulf Transmission
TC Energy Group	Gas Transmission Northwest	Great Lakes Gas Transmission	Northern Border Pipeline
	Nova Gas Transmission Line	Foothills System	Canadian Mainline
	MountainWest Pipeline	MountainWest Overthrust Pipeline	Williams Gas Pipeline-Northwest
Williams Group	Williams Gas Pipeline-Transco		

Source: MASTIO 29th Edition Natural Gas Transportation Customer Value Study – 2025

Mastio has accumulated over 35 years of experience in delivering actionable insights and impartial data, having successfully executed more than 900 projects and served over 350 clients across a spectrum of commodity-centric sectors. These include but are not limited to energy, utilities, transportation, logistics, plastics, chemicals, manufacturing, and service industries. Notably, Mastio maintains collaborative partnerships with numerous Fortune 100 and Fortune 500 enterprises.

For more information, contact Kevin Huntsman at 816-279-5200 or at khuntsman@mastio.com.

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