

**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 30th Edition Natural Gas Pipeline Report.

MASTIO is pleased to announce the publication of the 2026, 30th Edition of the industry-wide Natural Gas Pipeline Customer Value & Loyalty Benchmarking Study. The study, released to subscribers in early March, provides comprehensive insights into interstate, intrastate, and Canadian pipelines.

Based on 662 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 performance metrics, the study incorporates qualitative feedback gathered through open-ended questions. These responses provide additional insight into customer priorities and operational challenges faced by shippers. Respondents were asked questions such as:

- “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. Communicates in an honest and forthright manner.
3. Scheduled gas volumes are accurate.
4. Representatives are accessible when needed.
5. Accuracy of invoices.

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.	Columbia Gas Transmission Corp. Eastern Gas Trans. & Storage Northern Natural Gas 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. Columbia Gas Transmission Corp. Eastern Gas Trans. & Storage Northern Natural Gas Co. Southern Star Central Williams Gas Pipeline-Northwest

REGIONAL PIPELINE GROUP

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

Algonquin Gas Transmission Co.	MountainWest Overthrust Pipeline
Bridgeline Gas Distribution Co.	MountainWest Pipeline
California Gas Transmission	National Fuel Gas Supply Corp.
Carolina Gas Transmission	Northern Border Pipeline Co.
East Tennessee Natural Gas Co.	ONEOK Gas Transportation Co.
Enbridge Gas Ontario	Rockies Express Pipeline
Gas Transmission Northwest	Southern California Gas Co.
Great Lakes Gas Transmission, Inc.	Transwestern Pipeline Co.
Guardian Pipeline	Vector Pipeline
Iroquois Gas Transmission System L.P.	Viking Gas Transmission Co.
Kern River Gas Transmission Co.	WBI Energy Transmission
Midwestern Gas Transmission Co.	Westcoast 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.	94.52
2	Eastern Gas Trans. & Storage	92.71
3	Williams Gas Pipeline-Northwest	86.17
4	Southern Natural Gas Co.	83.90
5	Columbia Gas Transmission Corp.	83.64
6	Panhandle Eastern Pipe Line Co.	83.38
7	El Paso Natural Gas Co.	82.41
8	Tennessee Gas Pipeline Co.	81.99
9	Texas Eastern Transmission Corp.	81.56
10	Natural Gas Pipeline Co. of America	80.18
11	ANR Pipeline Co.	79.92
12	Tallgrass Interstate Gas Trans.	79.62
13	Williams Gas Pipeline-Transco	78.33

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.	84.58
Canadian Mainline	80.23
Texas Gas Transmission	79.88

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 30th Edition Natural Gas Transportation Customer Value Study – 2026

Legacy Indexes

Customer Satisfaction Index Major Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	94.52
2	Eastern Gas Trans. & Storage	92.71
3	Southern Star Central	89.74
4	Williams Gas Pipeline-Northwest	86.17
5	Colorado Interstate Gas Co.	85.92
6	Southern Natural Gas Co.	83.90
7	Columbia Gas Transmission Corp.	83.64
8	Panhandle Eastern Pipe Line Co.	83.38
9	El Paso Natural Gas Co.	82.41
10	Tennessee Gas Pipeline Co.	81.99
11	Texas Eastern Transmission Corp.	81.56
12	Natural Gas Pipeline Co. of America	80.18
13	ANR Pipeline Co.	79.92
14	Tallgrass Interstate Gas Trans.	79.62
15	Williams Gas Pipeline-Transco	78.33

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.	89.33
Gulf South Pipeline Co.	84.58
Canadian Mainline	80.23
Columbia Gulf Transmission Co.	79.94
Texas Gas Transmission	79.88
Enable Gas Transmission	79.53
Nova Gas Transmission Line	72.16

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

Source: MASTIO 30th Edition Natural Gas Transportation Customer Value Study – 2026

Legacy Indexes

Customer Satisfaction Index Regional Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.81
2	Carolina Gas Transmission	92.59
3	MountainWest Pipeline	91.91
4	Northern Border Pipeline Co.	79.32
5	Viking Gas Transmission Co.	74.52

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.	
MountainWest Overthrust Pipeline	93.51
California Gas Transmission	90.95
Iroquois Gas Transmission System L.P.	85.09
WBI Energy Transmission	81.30
Transwestern Pipeline Co.	80.76
Enbridge Gas Ontario	80.49
National Fuel Gas Supply Corp.	80.40
Vector Pipeline	80.26
Rockies Express Pipeline	77.94
Guardian Pipeline	77.44
East Tennessee Natural Gas Co.	77.13
Great Lakes Gas Transmission, Inc.	76.58
Westcoast Pipeline	75.92
Bridgeline Gas Distribution Co.	74.50
Midwestern Gas Transmission Co.	73.04
Algonquin Gas Transmission Co.	72.54
Southern California Gas Co.	72.54
Gas Transmission Northwest	72.27
ONEOK Gas Transportation Co.	72.21

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

Source: MASTIO 30th Edition Natural Gas Transportation Customer Value Study – 2026

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.81
2	Northern Natural Gas Co.	94.52
3	Eastern Gas Trans. & Storage	92.71
4	Carolina Gas Transmission	92.59
5	MountainWest Pipeline	91.91
6	Southern Star Central	89.74
7	Williams Gas Pipeline-Northwest	86.17
8	Colorado Interstate Gas Co.	85.92
9	Southern Natural Gas Co.	83.90
10	Columbia Gas Transmission Corp.	83.64
11	Panhandle Eastern Pipe Line Co.	83.38
12	El Paso Natural Gas Co.	82.41
13	Tennessee Gas Pipeline Co.	81.99
14	Texas Eastern Transmission Corp.	81.56
15	Natural Gas Pipeline Co. of America	80.18
16	ANR Pipeline Co.	79.92
17	Tallgrass Interstate Gas Trans.	79.62
18	Northern Border Pipeline Co.	79.32
19	Williams Gas Pipeline-Transco	78.33
20	Viking Gas Transmission Co.	74.52

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.	
MountainWest Overthrust Pipeline	93.51
Florida Gas Transmission Co.	89.33
Iroquois Gas Transmission System L.P.	85.09
Gulf South Pipeline Co.	84.58
WBI Energy Transmission	81.30
Transwestern Pipeline Co.	80.76
National Fuel Gas Supply Corp.	80.40
Vector Pipeline	80.26
Columbia Gulf Transmission Co.	79.94
Texas Gas Transmission	79.88
Enable Gas Transmission	79.53
Rockies Express Pipeline	77.94
Guardian Pipeline	77.44
East Tennessee Natural Gas Co.	77.13
Great Lakes Gas Transmission, Inc.	76.58
Midwestern Gas Transmission Co.	73.04
Algonquin Gas Transmission Co.	72.54
Gas Transmission Northwest	72.27

Source: MASTIO 30th Edition Natural Gas Transportation Customer Value Study – 2026

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas Ontario	80.49
2	Canadian Mainline	80.23
3	Westcoast Pipeline	75.92
4	Nova Gas Transmission Line	72.16

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	90.95
2	Bridgeline Gas Distribution Co.	74.50
3	Southern California Gas Co.	72.54
4	ONEOK Gas Transportation Co.	72.21

Source: MASTIO 30th Edition Natural Gas Transportation Customer Value Study – 2026

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	BHE Pipeline Group	94.71
2	Williams Group	85.08
3	Energy Transfer Group	83.15
4	Kinder Morgan Group	82.65
5	Boardwalk Pipeline Group	81.81
6	Enbridge Group	79.21
7	TC Energy Group	78.83
8	Tallgrass Energy Group	78.64
9	DT Midstream Group	74.81
10	ONEOK Partners Group	73.76

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 Group	Guardian Pipeline	Midwestern Gas Transmission	Viking Gas Transmission
Enbridge Group	Algonquin Gas Transmission	East Tennessee Natural Gas	Enbridge Gas
	Nexus Gas Transmission	Texas Eastern Transmission	Westcoast Pipeline
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.
	Trunkline Gas Co.		
Kinder Morgan Group	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
	Wyoming Interstate Co.		
ONEOK Partners Group	Bridgeline Gas Distribution Co.	Louisiana River Market	Louisiana Intrastate Gas (LIG)
	ONEOK Gas Transportation	ONEOK Westex	Sabine Pipe Line Co.
Tallgrass Energy Group	Rockies Express Pipeline	Ruby Pipeline	Tallgrass Interstate Gas Trans.
	Trailblazer Pipeline Co.		
TC Energy Group	ANR Pipeline Co.	Columbia Gas Transmission	Columbia Gulf Transmission
	Gas Transmission Northwest	Great Lakes Gas Transmission	Northern Border Pipeline
	Nova Gas Transmission Line	Foothills System	Canadian Mainline
Williams Group	MountainWest Pipeline	MountainWest Overthrust Pipeline	Williams Gas Pipeline-Northwest
	Williams Gas Pipeline-Transco		

Source: MASTIO 30th Edition Natural Gas Transportation Customer Value Study – 2026

Mastio has accumulated over 36 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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