



Enbridge and global gas demand:

A world of opportunity

The International Energy Agency (IEA) predicts global gas demand could grow by as much as 45% by 2040. In short, the world needs more gas, North America is expected to be a major player in supplying global markets—and Enbridge is very well positioned to facilitate that growth.

Enbridge is North America's premier energy infrastructure company, with about 23,850 miles of natural gas pipelines across the continent and in the Gulf of Mexico.

Enbridge has been meeting gas transportation customers' needs for decades with safe, reliable, transparent and flexible service. Our NEXUS, Sabal Trail and Valley Crossing pipelines all entered service within 18 months, demonstrating Enbridge's ability to execute multiple large-scale gas projects simultaneously.

Our connectivity, scale and scope allow us to offer a first- and last-mile advantage for our customers. Enbridge's network is very well positioned for growth and expansion—for both supply push from areas like the Permian, Marcellus and Western Canada, and demand pull from growing markets in the U.S. Northeast, Southeast and Gulf Coast.

We work diligently with our customers in developing cost-effective projects that access new sources of supply and new markets. Our stable business model and our strong balance sheet provide reliable access to capital to fund this new infrastructure.

From a global perspective, we are keenly interested in the Liquefied Natural Gas (LNG) market. With new U.S. LNG export plants already changing global gas dynamics, our pipelines are strategically located to meet growing demand—internationally, as well as domestically.

Pipeline	Length ¹	Peak capacity ²	Receipt and delivery points ³
SE Supply Header	287	1100	36
Gulf Midstream	745	1300	43
Sabal Trail	515	1000	11
Valley Crossing	176	2600	10
Algonquin Gas Transmission	1140	3120	220
Maritimes and NE	889	830	50
East Tennessee	1525	1860	225
Vector	350	1300	67
Nexus	256	1500	68
Texas Eastern	9096	1169	700
BC Pipeline	1751	2900	92
Alliance	2391	1600	66

¹miles

²MMcf/d

³Approximate at time of publication

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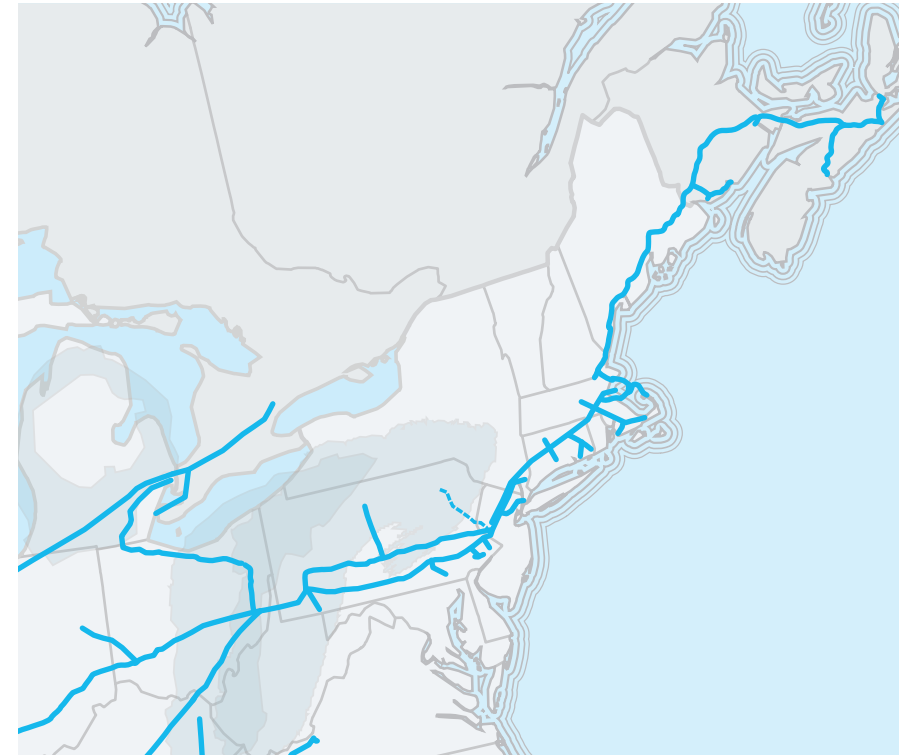
U.S. Gulf Coast



North America's center of gas growth is in the U.S. Gulf Coast, where the LNG export market is driving demand—as are increasing exports to Mexico and robust industrial development.

Enbridge is well-positioned to serve these transportation needs. Our Texas Eastern Transmission and Valley Crossing pipelines draw from multiple basins, including the Permian, East Texas and Marcellus. Our pipeline network spans the entire Gulf Coast, with connectivity to all major market centers. Our pipelines provide gas delivery to several of the major LNG export facilities along the Gulf Coast and are well situated to serve additional export facilities as they come on line. Our connectivity to multiple supply basins, storage facilities, most major market hubs and numerous end users gives our customers substantial flexibility to manage their gas transmission needs.

East Coast



Enbridge's extensive gas pipeline network connects to the Marcellus and Utica supply basins, as well as all coastal markets in the region—from Philadelphia to Halifax.

The backbone of our system is the bi-directional Texas Eastern Transmission pipeline, which spans more than 9,000 miles from Texas to New Jersey and moves more than 11 billion cubic feet of gas a day (Bcf/d). Our Algonquin Gas Transmission and Maritimes & Northeast pipelines extend our reach into New York, New England and Canada's Atlantic provinces.

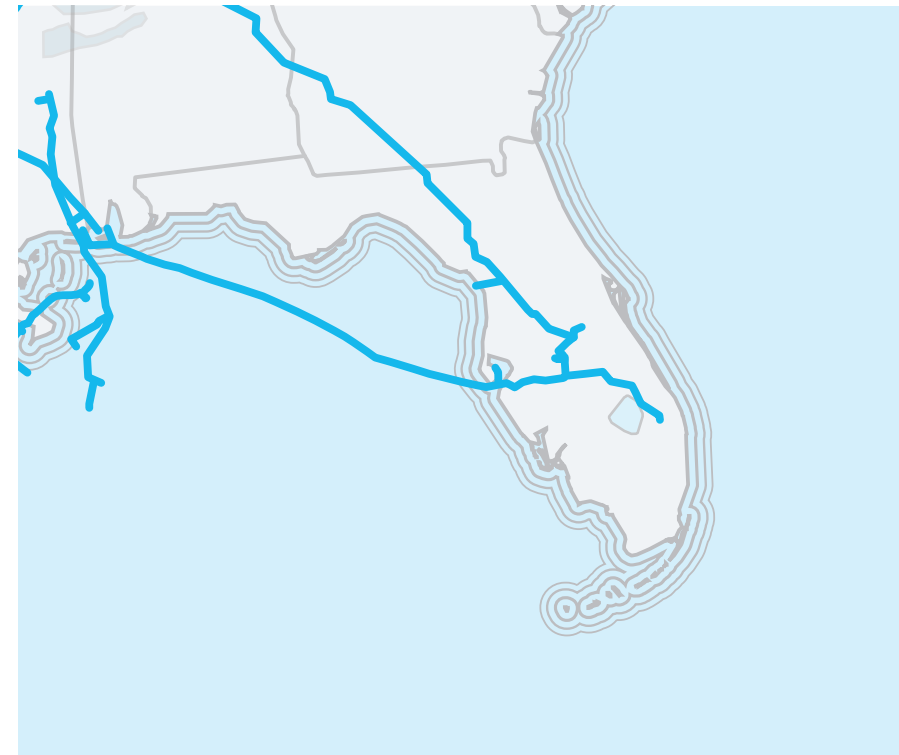
Western Canada



We see opportunity on Canada's West Coast, where Royal Dutch Shell and partners are moving forward with the LNG Canada project—what could be the first of several new projects vaulting Canada into the position of large-scale LNG exporter.

With pipeline assets in Western Canada that include the BC Pipeline (T-North and T-South) and the Alliance Pipeline, Enbridge is well positioned to deliver growing supply from the Western Canadian Sedimentary Basin (WCSB) for both new LNG projects on Canada's West Coast, as well as to existing markets to the south and east.

Southeast



Florida, Alabama and Georgia have a growing appetite for natural gas particularly from a power perspective due to increasing electricity demand and continued fuel switching from coal. Enbridge is well positioned to meet that demand.

The Gulfstream pipeline moves 1.3 Bcf/d of gas from Mobile County, AL, across the Gulf of Mexico to demand centers like Tampa and Palm Beach. The Sabal Trail Transmission line, originating in Alabama, delivers 1 Bcf/d more to a hub in central Florida. This affordable, clean-burning fuel is used in the Sunshine State by local distribution companies, industrial users and natural gas-fired power generators.