

Fuelling the future

The Canadian Gas Association's 2026 natural gas playbook

CANADIAN GAS ASSOCIATION
ASSOCIATION CANADIENNE DU GAZ

October 2026



About

The Canadian Gas Association

The Canadian Gas Association (CGA) is the voice of Canada's gas energy delivery industry, providing homes and businesses with essential fuels including natural gas, renewable natural gas (RNG) and hydrogen.

CGA membership includes energy distribution and transmission companies, equipment manufacturers and suppliers of goods and services to the industry. CGA's utility members are Canadian-owned and active in eight provinces and one territory. The Canadian natural gas delivery industry meets almost 40 per cent of Canada's energy needs through



a network of approximately 600,000 kilometres of underground infrastructure. The versatility and resiliency of this infrastructure allow it to deliver an ever-changing gas supply mix to over 7.8 million customer locations serving approximately two-thirds of Canadians. CGA members ensure Canadians get the affordable, reliable and safe gas energy they want and need.

* Sources for all data and statements throughout the document can be found on page 64-65.

A message from the

CGA Board Chair & President and CEO

Welcome to the Canadian Gas Association's *2026 natural gas playbook*.

Canada's energy needs are growing. New homes, businesses, industry, data centres and electricity generation are all increasing demand for reliable and affordable energy. Meeting that demand will require all of Canada's energy resources — with natural gas continuing to play an outsized role.

Every day, Canada's natural gas delivery industry provides energy to millions of Canadians, supporting homes, businesses, essential services and industries across the country. We do this work with safety as our top priority because it is a responsibility we take seriously, and one Canadians count on us to deliver each and every day.

As Canada makes choices about its energy future, we aim to better inform consumers and decision

makers about the importance of our energy infrastructure and the people who build and operate it.

The *2026 natural gas playbook* helps tell that story. It provides a clear picture of Canada's natural gas system and the role it plays in meeting Canada's energy needs by delivering the affordable, reliable and safe energy Canadians rely on.

We invite you to explore the *Playbook* and learn more about how natural gas keeps Canadians warm, businesses competitive and communities moving.

For questions or feedback, contact us at info@cga.ca.



Michele Harradence

Executive Vice President and President, Gas Distribution and Storage, Enbridge Gas Inc.

Chair, Canadian Gas Association Board of Directors



Susanna Zagar

President and CEO, Canadian Gas Association

Natural gas at a glance

Gas energy (natural gas, renewable natural gas,[1] hydrogen) is the fastest-growing energy choice among Canadians, a choice backed by a robust production, delivery and end-use value chain. The natural gas industry is constantly improving its safety and environmental performance to meet customer needs. Our efforts allow us to keep natural gas affordable, reliable and safe for Canadians.



Natural gas meets approximately **40%** of Canada's energy needs



Canada is the **5th largest** producer of natural gas globally

Canadians are connected by approximately **600,000 km of pipeline** across **8** provinces and **1** territory

Canada's natural gas resource base is **1,325 Tcf** (trillion cubic feet) equal to over **200 years** of supply

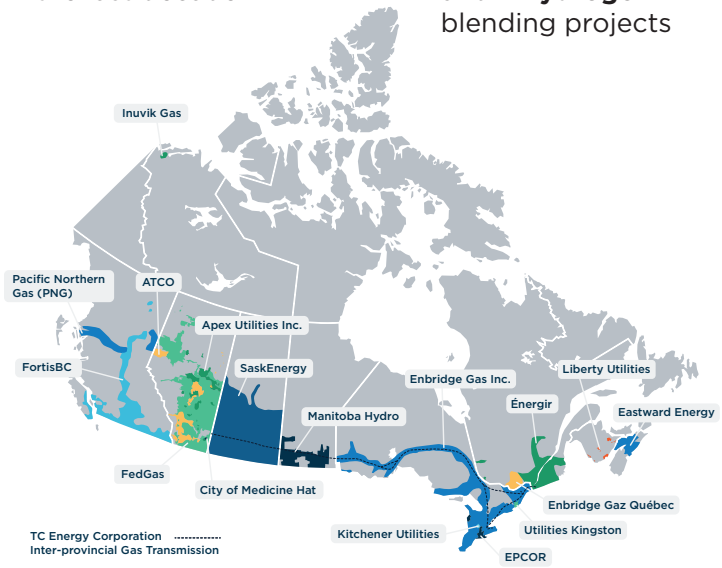
Over **800,000** customers joined the gas system in the last decade



Canadian natural gas distribution companies

Natural gas use has increased by **32%** in the last decade

Canada has **34 RNG** facilities and **2 hydrogen** blending projects



The energy storage capacity of Canada's natural gas system alone is **100,000 times** greater than all of Canada's electric storage capacity, ensuring energy systems are resilient and reliable.



CANADA'S ADVANTAGE

Canadian natural gas is a foundation of North American energy security. In 2025, Canada exported 3.3 trillion cubic feet, primarily via pipeline to the United States, ensuring an affordable, reliable and safe energy supply across the continent.

Fuelling Canadian communities

Natural gas touches nearly every segment of Canadian life. It is the dominant source of energy for Canadian homes, buildings and industries and is a growing energy source for power generation and transportation markets.



Natural gas is used as a feedstock to produce fertilizers, which help feed the world, and plastics, which are in everyday household products, like cell phones and credit cards.

Natural gas contribution to each sector's energy needs in Canada

46%
Industrial

46%
Commercial

46%
Residential

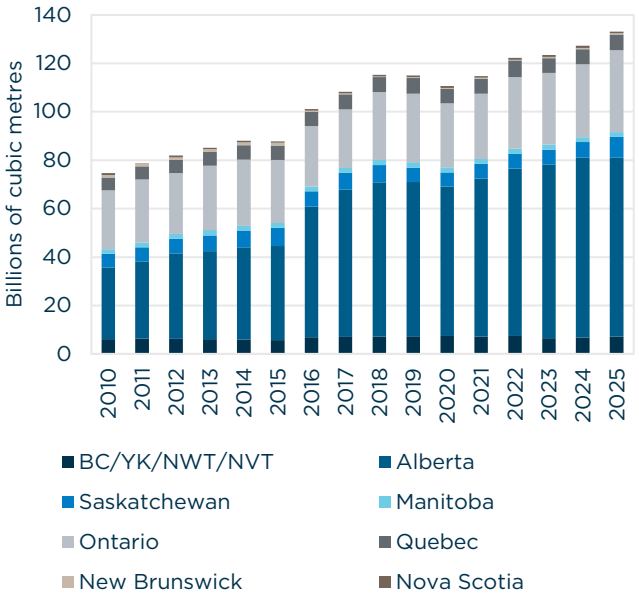


Canada is also a key contributor to U.S. energy supply, providing enough natural gas to meet the needs of 67 per cent of American households. Canada-U.S. gas energy infrastructure is comprised of pipelines extending nearly 600,000 km in Canada and 4.25 million km in the U.S., which transport natural gas, renewable natural gas (RNG), and hydrogen to fuel homes, businesses, and industries throughout North America.

Strategic imports at select locations help keep regional markets functioning reliably and affordably on both sides of the border. Moreover, by meeting a significant share of U.S. natural gas demand, Canadian exports enable the U.S. to redirect its domestic supply toward Liquefied Natural Gas (LNG) exports, strengthening energy security not just for North America but for allies around the world.

Currently, natural gas meets approximately **40%** of Canada's energy needs, up from 35% a decade ago, and the market share is growing.

Natural gas sales - by province



Source: Statistics Canada 25-10-0059, 25-10-0058-01, CGA



$950.23/year

Average among typical annual bills across Canada in 2025.

Natural gas

A growing customer base

over 800,000

new customers have joined the system over the past decade.

over 75,000

new customers joined the natural gas system in 2025.



The customer base for natural gas has been growing at a 2.3% annual rate since 1980. By comparison, Canada's population has exhibited an annual growth rate of 1.2% over the same period.

Driving the Canadian economy

Direct and indirect JOB CREATION

Canada's gas delivery companies employ over 13,000 Canadians on a full-time basis. A further 40,000 people are directly employed in the upstream extraction and pipeline transmission segments of the industry. Beyond these direct jobs, the broader employment impact comes from the competitive advantage that affordable energy provides, attracting commercial and industrial employers and supporting many more indirect jobs across the economy.



Significant
ANNUAL INVESTMENT

Over the past decade, Canada's natural gas distribution utilities have invested over $71 billion in new capital projects and maintenance of existing systems. In 2025 alone, CGA members invested over $7.3 billion.

A foundation for
ECONOMIC COMPETITIVENESS

Manufacturers and businesses of all sizes, across all sectors, need affordable energy to create new jobs in Canada and to compete and grow globally. Natural gas is well suited as an affordable energy option to support new industrial and manufacturing investments.



AFFORDABLE

Canada has a world-class natural gas resource base — enough to last over 200 years. This abundance makes natural gas the lowest cost per unit of energy available and the most affordable source of energy for home heating and industrial development in nearly every region of the country.

Canada has over 200 years of proven natural gas reserves. With a stable and growing supply across North America, natural gas remains an affordable and reliable energy source. Canada produces more natural gas than it consumes, ensuring long-term reliability for domestic use and export opportunity.

Production
Volume of gas produced in 2025

Consumption
Volume of gas consumed in 2025



Potential resources

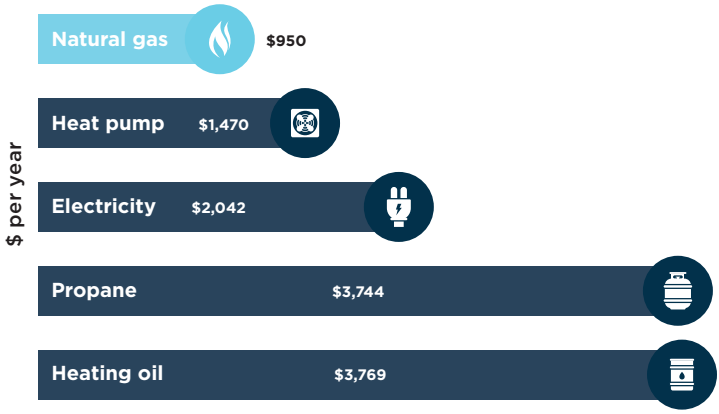
1,325 Tcf

(trillion cubic feet)

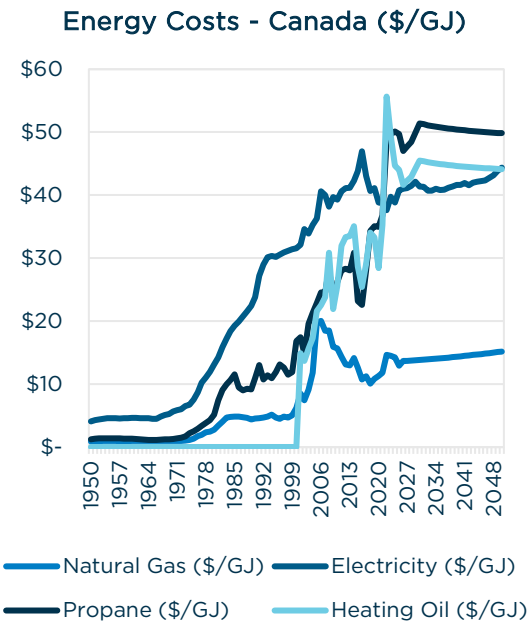
Abundant savings

At a national level (average), households that use natural gas for space and water heating save $500 to $2,800 per year, compared to homes using propane, electricity, and heating oil for the same applications. More recently, natural gas utilities have been looking at new approaches to meeting the evolving energy needs of consumers, including hybrid heating, which combines a heat pump with a high-efficiency furnace. In addition, utilities are supporting the commercialization of gas heat pumps that offer a 40–50% increase in energy efficiency vs. a high-efficiency furnace.

Residential space and water heating costs
Canada 2025



Natural gas pricing outlook



As of 2025, the delivered cost of natural gas had declined by 35% since 2006.

Average savings of up to **$1,303** per year.

The abundance of natural gas has kept the product more affordable.



$26,000

Average customer savings over the life of the gas heating equipment in a typical home.

Since the 1970s, the price gap between natural gas and other fuel sources has widened significantly, underscoring the affordability advantage of natural gas. The current outlook to 2050 by the Canada Energy Regulator (CER) projects that the delivered price of natural gas will be two to three times below the forecast cost of other energy options.

NATURAL GAS

The most affordable energy per unit

Here are the commonly used units of measurement of the various forms of energy (electricity, gasoline, natural gas, diesel fuel, home heating oil, etc.).

1 GJ

OF NATURAL GAS

is equivalent to...



277.78

kWh

ELECTRICITY



28.85

litres

GASOLINE



25.85

litres

DIESEL/HOME HEATING OIL



26.81

m^3 (cubic metres)

NATURAL GAS



946.77

ft^3 (cubic feet)

NATURAL GAS

In 2025, the average price for natural gas in Canada was around **$1.75 per GJ**. If you paid **$1.75** for a gigajoule of natural gas, this would be equivalent to paying just **0.63 cents per kilowatt hour** for that energy as electricity or **6 cents per litre** for that amount of energy as gasoline.



$1.75 / GJ

OF NATURAL GAS

is equivalent to...

$0.0063

per kWh

ELECTRICITY

$0.0607

per litre

GASOLINE

$0.0677

per litre

DIESEL/HOME HEATING OIL

$0.0653

per m^3

NATURAL GAS

$0.0018

per ft^3

NATURAL GAS



RELIABLE

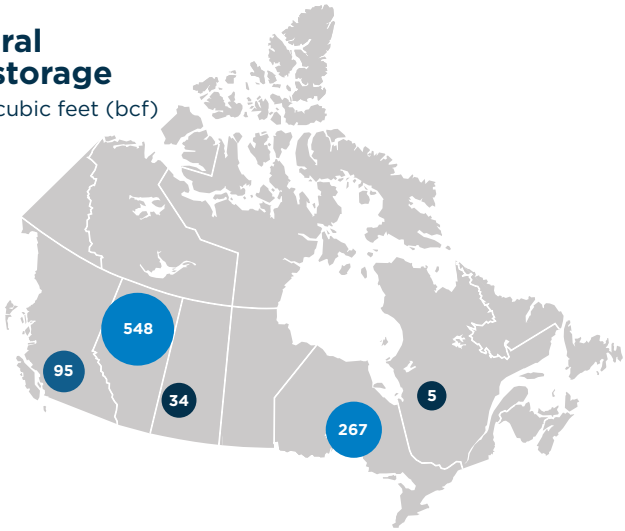
Approximately 600,000 km of natural gas infrastructure delivers and stores energy, even during severe weather conditions and peak demands, making it one of the most reliable sources of energy.

Energy storage advantage

One of the most advantageous characteristics of Canada's natural gas infrastructure, in addition to its delivery capacity, is its energy storage capacity. Natural gas storage plays a vital role by providing a reliable supply, buffering against seasonal variations, providing market stability and flexibility, and responding to emergencies.

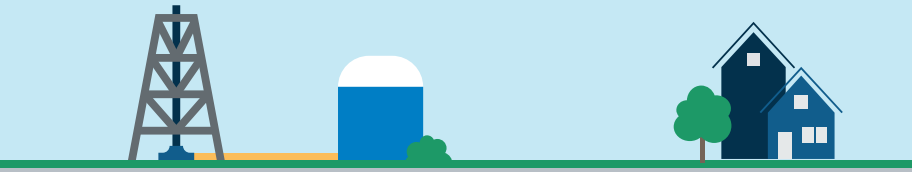
Natural gas storage

billion cubic feet (bcf)



Canada has **948 billion cubic feet of underground natural gas storage capacity**. This is enough to heat 11.5 million residential customers for one year or provide more than 50 days of supply during a typical Canadian winter when demand is at its highest.

Natural gas is stored in depleted energy production reservoirs, salt caverns or aquifers and in aboveground liquefied natural gas (LNG) facilities. Storage is “filled” through the summer, so when winter arrives, these natural gas supplies are available to meet customers’ increased needs, reliably and affordably.





Canada’s natural gas storage capacity is equal to just over 286 billion kilowatt hours (KWh) of energy, the energy that could be stored by 20.1 billion home electricity storage systems.

Fewer outages and better reliability



Natural gas infrastructure is underground, making it more resilient against external factors like inclement weather, natural disasters, wildlife and vegetation.

Outages in the gas system are incredibly rare. In the natural gas delivery system, Canadians can expect an affordable, reliable, and consistent source of energy that meets their demands.



On average, an **electricity customer** should expect **2.6 outages per year**, and the average **gas customer** should expect to experience **one gas outage every 21 years**.



Reliable partner in Canada's energy mix

Natural gas is playing a growing role in keeping Canada's electricity grid stable and dependable. While wind and solar are important renewable sources to generate electricity, they aren't always available. Natural gas steps in when the sun isn't shining or the wind isn't blowing, ensuring power is there when Canadians need it. Its reliability makes it essential to Canada's energy future.

Natural gas use for electricity generation in Canada hit its highest level in 20 years in 2025, and the upward trend is continuing into 2026.



INNOVATION

Emissions on CGA member company distribution systems have decreased by over 24% since 2000, even as the industry has added thousands more kilometres of distribution and service lines to connect new customers.

Reducing pipeline emissions

Canada's natural gas delivery industry works every day to drive innovation that will ensure Canadian homes, businesses, and industries have access to affordable, safe, and reliable energy for the long term.

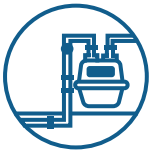


Canada completed the replacement of all cast-iron gas distribution pipelines in 2012. In comparison, the U.S. is still in the process of replacing its cast-iron pipeline system.

Natural gas companies are making significant inroads in reducing emissions, both those of consumers and those from our system operations. CGA members have adopted new technologies and practices that improve operational efficiency and reduce emissions, including:



Damage prevention programs, which have resulted in reductions of third-party damages by approximately 46% since 2005.



Voluntary use of excess flow valves (EFVs) for installation of new/ replacement services.



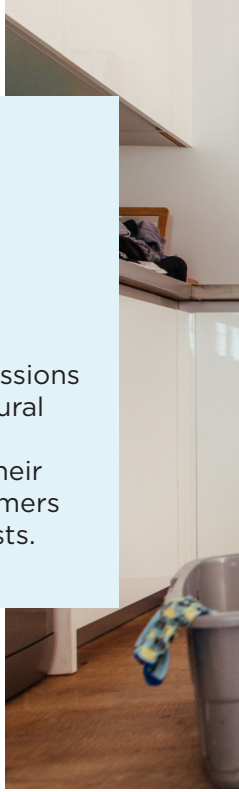
Asset and integrity management programs based on regulatory requirements (CSA Z662, specifically Annex N) supported by the CGA Asset and Integrity Management Database and the sharing of leading practices.



Data-driven leak survey and targeted replacement programs in accordance with the Asset and Integrity Management Programs and Databases.

Commitment to efficiency

Energy efficiency helps reduce end-use emissions from gas consumers. For over 20 years, natural gas distribution utilities have developed successful energy efficiency programs for their residential, commercial and industrial customers to help them lower their energy use and costs.



Methane management

The gas energy industry continually invests in new technologies and practices to reduce emissions from its infrastructure systems, such as optical gas imaging cameras and continuous monitoring systems, which have greatly improved leak detection speed and accuracy and support the development of additional infrastructure. Downstream natural gas infrastructure operators have reduced their methane emissions by 20% over the last decade.

Carbon capture

Carbon capture, utilization and storage (CCUS) is a set of technologies that can greatly reduce CO_2 emissions from new and existing natural gas consumer locations. As technology advances, we are witnessing smaller scale and more affordable CCUS technologies.



Since 2013, CGA members have invested **over $3.3 billion** in their energy efficiency programs.

This saved customers over 2.6 billion cubic metres of natural gas and **cut GHG emissions by over 5.1 million tonnes CO_2eq.** – equivalent to removing more than **1.7 million passenger vehicles** from the roads.

Renewable gases

The natural gas delivery industry is committed to leveraging its world-class energy infrastructure, robust safety culture, and continuous drive for innovation to realize the hydrogen and renewable natural gas opportunity.



Hydrogen

Hydrogen is the universe's most abundant element and a versatile energy carrier, the use of which can help reduce emissions. Hydrogen can be blended into natural gas, stored in bulk, and used to fuel transportation, industry, and heating. Canada is well positioned to produce hydrogen at scale and the natural gas industry is a leading player in its development and use.

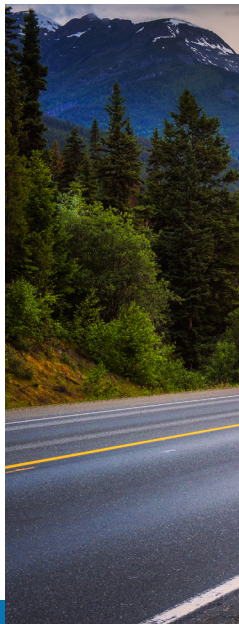


Renewable natural gas (RNG)

RNG is methane produced from organic waste from farms, forests, landfills, and water treatment plants. The gas is captured, treated, and injected into pipelines to be used in the same way as natural gas from any other source.

The future of renewable gas

As we look to the future, our industry is integrating growing volumes of hydrogen and RNG that will provide consumers with the same level of energy services as natural gas provides today.



Natural gas heat pumps

Natural gas heat pumps are being deployed across Canada, offering **efficiencies well above 100%**. Electric heat pumps perform well in many conditions, but in extremely cold temperatures, natural gas heat pumps have the advantage, maintaining high performance and providing a reliable, lower-emission fuel for home heating, suitable for Canada's climate. They combine the affordability and reliability of natural gas and offer the possibility to transition to hydrogen in the future. Utilities like FortisBC, Enbridge Gas, ATCO Energy Systems, Eastward Energy, Pacific Northern Gas and SaskEnergy are piloting natural gas heat pumps to test performance and demonstrate the technology, laying the foundation for wider adoption of this efficient technology option.



Supporting global emissions reduction

CLEER

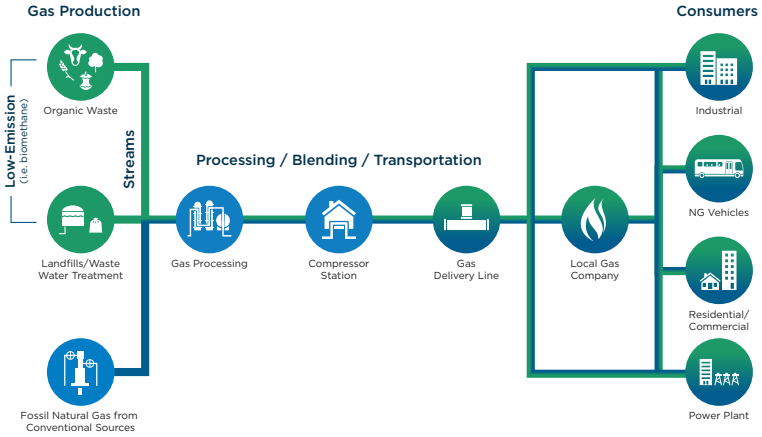
Canadian Low-Emission Energy Registry

The Canadian Low-Emission Energy Registry (CLEER) is a national system designed to support the growth of Canada's biomethane and other low-emission energy markets through credible and transparent environmental attribute tracking.

Developed by the Canadian Gas Association with support from Renewable Energy Assurance Limited (REAL), CLEER will track digital certificates that represent the environmental attributes of biomethane and other low-emission energy sources, including hydrogen, throughout their life cycles.

The registry will provide a nationally consistent framework for transferring and retiring environmental attributes, helping prevent double counting and giving producers, utilities, consumers, regulators and investors greater confidence in environmental claims.

By strengthening market transparency and certainty, CLEER will help support investment, facilitate transactions and advance the development of biomethane and other low-emission energy markets across Canada. The registry is being developed with support from funding partners, including Natural Resources Canada and the Province of British Columbia.



Canadian Energy Partnership for Environmental Innovation



Canadian Energy Partnership for Environmental Innovation

The Canadian Energy Partnership for Environmental Innovation (CEPEI) is a national industry collaboration that has supported environmental data, research and regulatory readiness across Canada's gas sector for more than 25 years.

CEPEI works with its members to collect and analyze emissions data, support regulatory compliance and identify emerging environmental issues. Its work includes widely used datasets on greenhouse gases and criteria air contaminants, as well as research on trace contaminants in natural gas. CEPEI data has also contributed to Canada's National Inventory Reports.



This work is supported by technical studies and tools, including the Emissions Estimation Manual and CEPEI Combustion Emissions Calculator. These resources provide emission factors and calculation methodologies used by industry, government and verification bodies, with the calculator also referenced by Environment and Climate Change Canada for National Pollutant Release Inventory reporting.

CEPEI also develops guidance to help members interpret and comply with evolving environmental regulations and represents the Canadian gas sector on technical working groups in Canada and internationally. Through this work, CEPEI provides credible data and technical expertise to support informed policy, regulatory compliance and continuous improvement in environmental performance.



Liquefied natural gas (LNG)

LNG can play a variety of important roles both domestically and abroad. Canadian LNG has among the lowest upstream emissions, backed by strict methane rules and 80% non-emitting electricity grid. Domestically, LNG has been used to support remote communities in their efforts to transition off higher polluting fuels, particularly in the North. We can also take our LNG's benefits to the world, to meet global energy demand while delivering emissions reductions globally.



Compressed natural gas (CNG)

CNG is the same fuel we use to heat homes, compressed to less than one per cent of its volume so it's suitable to fuel fleets like transit and waste collection.

CNG vehicles provide a straightforward pathway to renewable natural gas (RNG) because the same vehicles and fuelling infrastructure can typically utilize RNG without major modifications — helping to reduce emissions further.



Over the past decade, retail CNG has averaged roughly **$0.84 per diesel litre** equivalent, compared to an average diesel price of approximately $1.40/L, representing an average fuel cost advantage of about **40%.**

The average Canadian transit bus consumes approximately **$54,000 of fuel** annually, while the average refuse vehicle consumes approximately $51,800 annually.

Conventional CNG heavy-duty vehicles can reduce greenhouse gas emissions by approximately **20-30%** compared to diesel, depending on vehicle type, duty cycle, and fuel pathway.


SAFETY
FIRST

SAFE

Safety is a core value for Canada's natural gas utilities. We are committed to continuously improving our longstanding record of safety as we deliver affordable and reliable natural gas across the nation.

Canada's natural gas delivery industry's safety commitments

- Continue to lead in the efficient design, construction, operation and maintenance of Canada's natural gas delivery systems through a culture focused on public and worker safety, reliability, security and resilience.
- Continuously improve through ongoing learning, innovation and sharing of knowledge while maintaining our commitment to an open and transparent dialogue with all stakeholders.
- Pursue an aspirational goal of faultless safety, integrity and reliability, together with environmental stewardship.

Industry safeguards

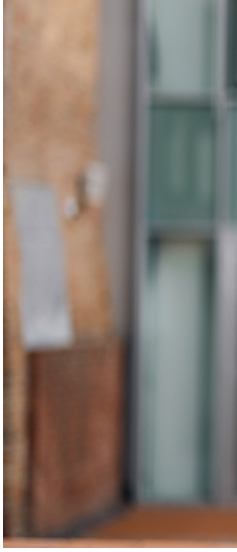
Gas delivery systems are designed, built, operated, and maintained to meet and exceed the highest Canadian codes and standards. The industry ensures compliance with several national standards developed by the Canadian Standards Association (CSA).

Additionally, addressing cyber and physical security threats is a priority for CGA members and is part of the industry's commitment to safety and resiliency. CGA's members employ strong security programs to protect their systems and work closely with government partners to share information and best practices.

The industry has put in place safeguards to detect a potential natural gas leak. Natural gas delivery organizations have comprehensive, data-driven leak survey programs based on their asset and integrity plans.



Utilities odourize natural gas with **mercaptan**, which smells similar to rotten eggs, in order to provide an added layer of safety for leak detection purposes.



Maintaining a safe energy system

Natural gas delivery infrastructure is continually maintained to ensure its integrity. Once installed, natural gas delivery systems are operated and maintained through the application of sophisticated technologies and the most modern procedures, such as in-line inspection programs. To assist with this, CGA members share information and leading practices, working to ensure compliance with the relevant industry codes and standards.

Protecting energy systems against cyber attacks

Since 2015, CGA has been leading various cybersecurity initiatives, including the development of Industrial Control System Security guidance, workshops, and regular committee meetings. In 2020, CGA began the development of an operational information sharing initiative called the Blue Flame Program (BFP) with the goal of reducing cyber vulnerabilities through timely action and threat response. The BFP is a sector-specific partnership between CGA and the Canadian Centre for Cyber Security (Cyber Centre) to provide access to enhanced security services, facilitate the collaborative sharing of technical information, and produce tailored threat analysis. BFP has grown into a recognized leader in cyber information sharing across key government departments and industry.



Customer safety

All natural gas pipeline operators have safety awareness programs to help educate the public living and working in the vicinity of natural gas delivery systems, as well as education programs for provincial and local emergency response personnel, public officials, and excavators.

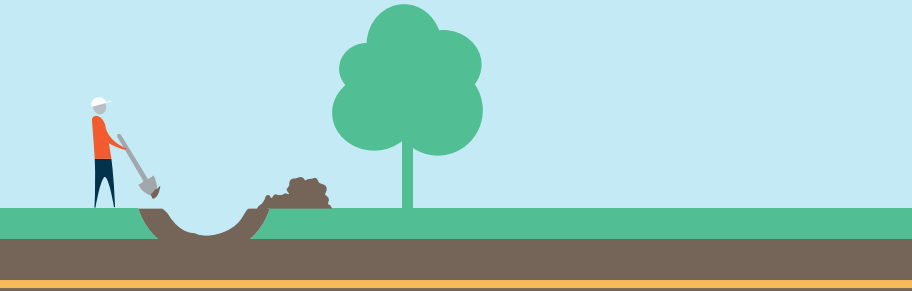
While the industry has multiple safeguards in place to protect its customers, it is important that those customers actively participate in advancing safety by:

- Maintaining gas appliances and fuel lines.
- Reporting the smell of natural gas immediately.
- Obtaining locates before any excavation project.
- Being attentive to safety communications provided by utilities.

Safety programs

Dig safe: Know what's below

Excavation without first knowing the location of the underground infrastructure, such as natural gas lines, electricity, cable, and telecommunications wires, is the leading cause of damage to this infrastructure.



If planning an excavation project, such as planting a tree, building a fence or adding new landscaping around your property, take the time to obtain your underground utility locates. Avoid digging within one metre on either side of the locate markings. Underground infrastructure could be as shallow as a few inches from the surface.

Before digging, visit **www.clickbeforeyoudig.com** or contact your provincial **One-Call centre.** It's free and quick.





If you suspect a line was hit or smell gas, call 911 or the gas company. Leave the excavation open until it has been inspected by a certified representative.

Carbon monoxide awareness

Carbon monoxide (CO) is a colourless, odourless and tasteless toxic gas. In an enclosed space, such as a home or garage, even a small amount can cause serious illness or death. CO is produced through the incomplete combustion of propane, gasoline, natural gas, wood or heating oils. This can occur when a fuel-burning appliance is not maintained, a vent is blocked or damaged, or a vehicle is left running in an attached garage.

Some of the symptoms of carbon monoxide exposure include flu-like symptoms (without the fever) such as impaired motor functions, chest pain, tiredness or dizziness.

If carbon monoxide exposure is suspected, leave the building immediately and contact 911.

Prevention awareness



Yellow flames

Check the flame on all natural gas appliances regularly (it should be blue — a yellow burner flame can be a sign of carbon monoxide).



Blocked vents or chimneys

A blocked or restricted vent/chimney will reduce flue performance, increasing the chances of CO or other fumes spilling into the home. Be sure to clean your vents/chimneys regularly.



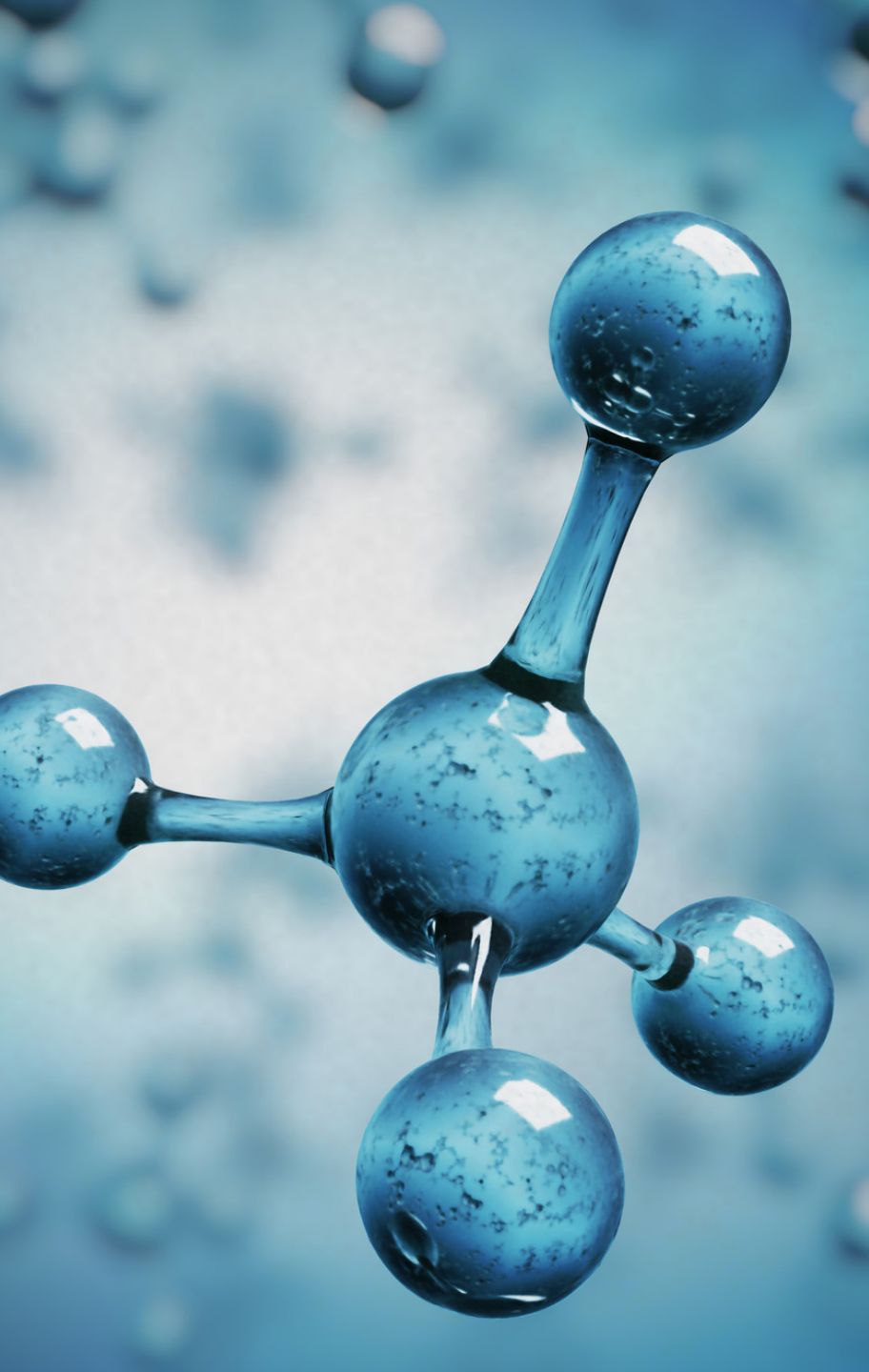
Car exhaust

Despite having properly maintained exhaust systems, it is still possible that CO could get into your vehicle. Also, if you are idling in the cold weather with poor ventilation the heating system can draw CO into the vehicle.



Furnaces

Remember to check and replace your furnace filter regularly. To be sure that your furnace exhaust system is working properly, it should also be inspected routinely by a licensed professional.



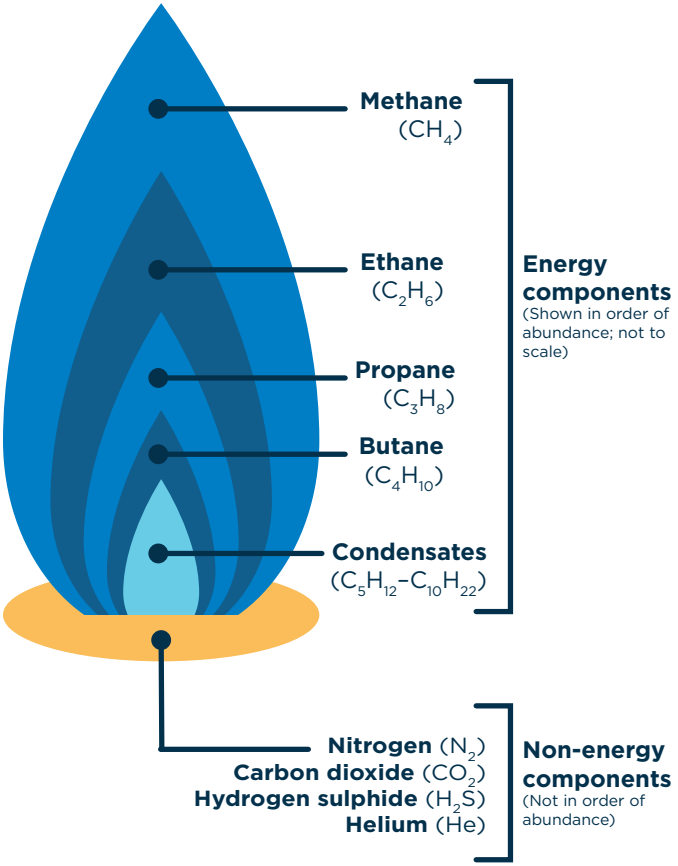
NATURAL GAS 101

Learn what natural gas is and how it fuels Canadian homes and communities.

What is natural gas

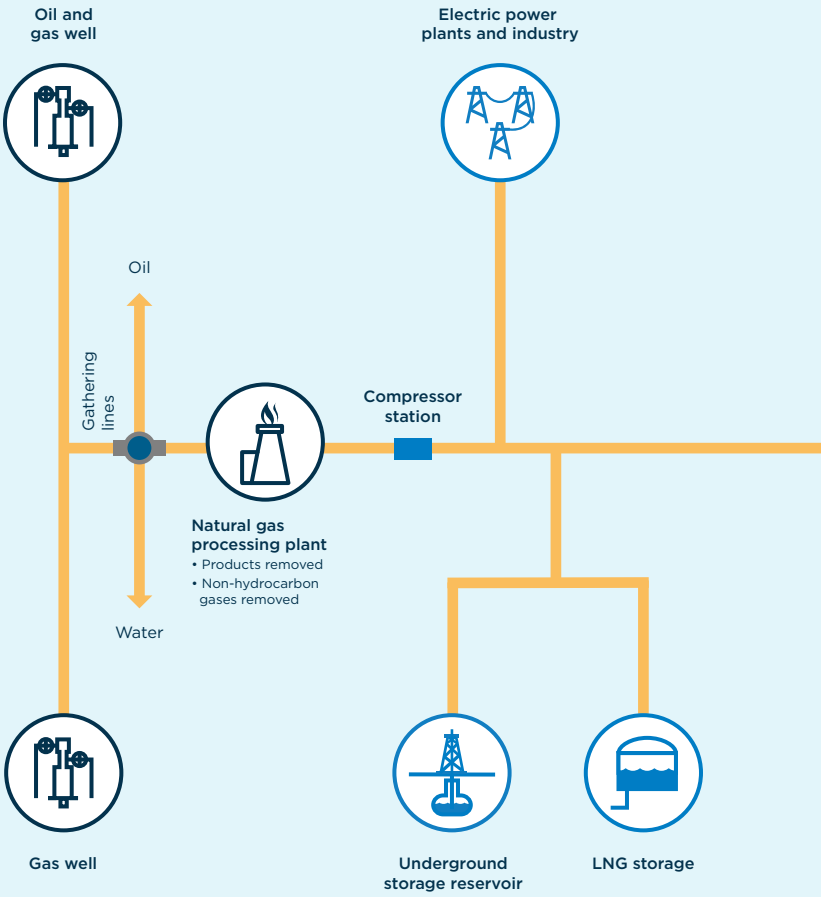
Natural gas is a naturally occurring energy source found underground in sedimentary basins. Natural gas consists primarily of methane, with lesser amounts of ethane, propane, butane and pentane. In its natural state, natural gas is colourless and odourless. However, an odourant known as mercaptan is added to natural gas prior to it reaching customers to make it easier to detect. Natural gas is brought to the surface using wells that feed gathering systems that bring the natural gas to processing plants. Once processed, natural gas is transported by pipelines to customers throughout Canada and the United States.

In addition to geologic sources of natural gas, Canadian companies are actively blending renewable natural gas and hydrogen into their pipelines as supplemental supply.



The journey of natural gas:

from wellhead to burner tip

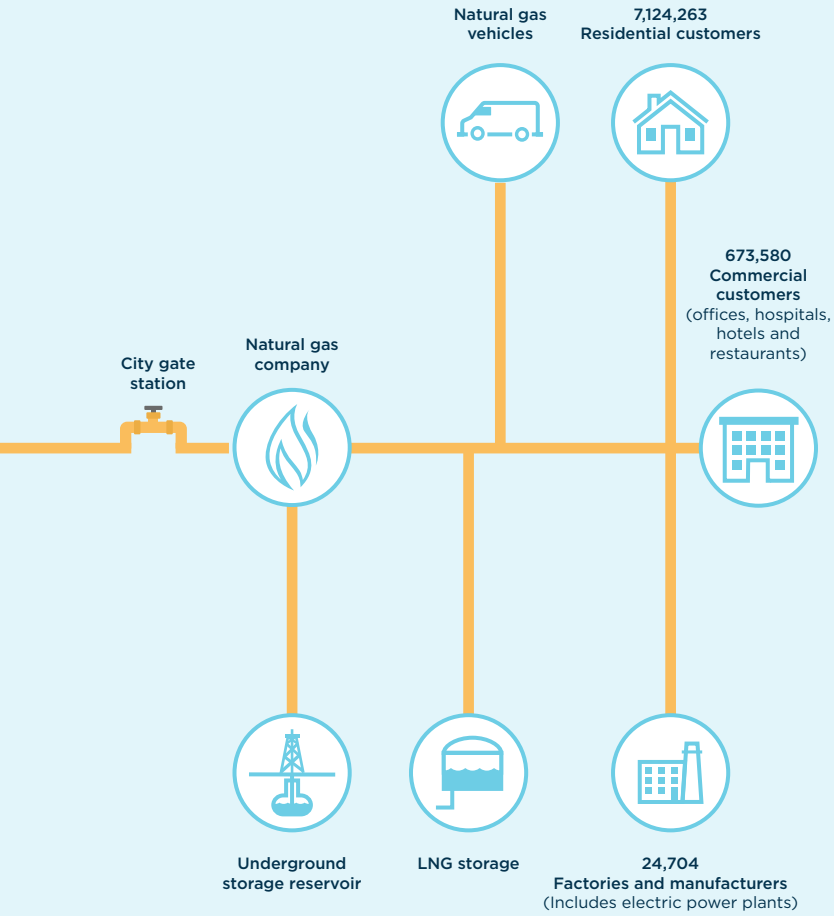


PRODUCTION | **TRANSMISSION**

CGA members have approximately

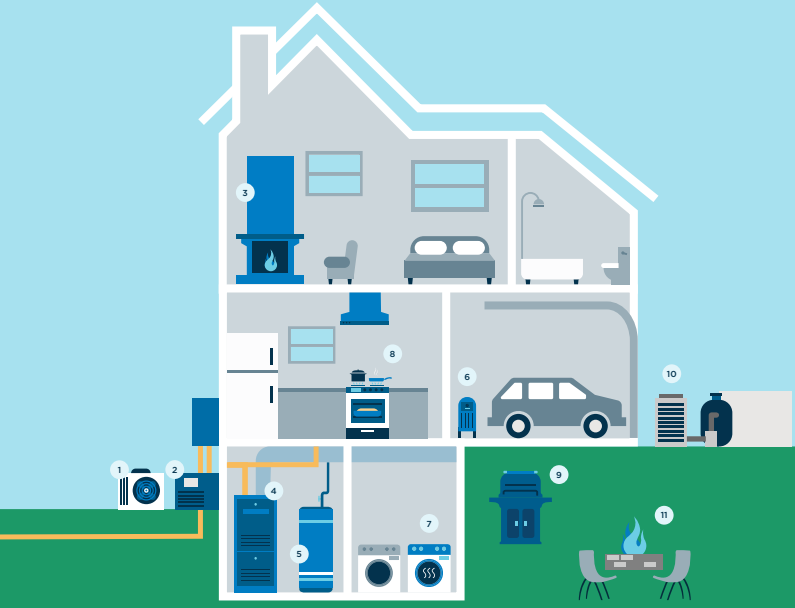
600,000 km

of natural gas delivery lines in Canada



DISTRIBUTION

Natural gas at home



1. Gas heat pump*
2. Generator
3. Fireplace
4. Furnace
5. Water heater
6. Wall heater
7. Dryer
8. Stove
9. Barbecue
10. Pool/hot tub heater
11. Fire pit

* Natural gas heat pumps are currently in the deployment stages across Canada and many utilities are piloting them to assess the opportunity for more widespread commercialization.

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Sources

[1] **Renewable natural gas** (also called RNG or biomethane) is produced in a different manner than conventional natural gas. It is derived from biogas, which is produced from decomposing organic waste from landfills, agricultural waste and wastewater from treatment facilities. The biogas is captured and cleaned to create RNG. When RNG is added to North America's natural gas system, it mixes with conventional natural gas, the more RNG is added to the gas system, the less conventional natural gas is needed, thereby reducing the use of fossil fuels and overall greenhouse gas emissions.

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