

Economic Infrastructure Subcommittee

Tuesday, November 18, 2025
10:30 AM - 12:30 PM
Reed Hall (102 HOB)

Daniel Perez
Speaker

Chip LaMarca
Chair

Committee Meeting Notice

HOUSE OF REPRESENTATIVES

Economic Infrastructure Subcommittee

Start Date and Time:	Tuesday, November 18, 2025 10:30 AM
End Date and Time:	Tuesday, November 18, 2025 12:30 PM
Location:	Reed Hall (102 HOB)
Duration:	2.00 hrs

Presentations on Fueling Florida’s Energy Needs

NOTICE FINALIZED on 11/07/2025 3:31PM by Marks.Amie

1- FNGA

Fueling Florida's Prosperity with Resilient Energy Solutions



NATURAL GAS *limitless* opportunity

November 2025 • Presented by Dale Calhoun

NATURAL GAS

- Powers Florida's Economy
- Essential to Reducing Our Carbon Footprint
- Critical to Domestic Security
- Reliable During Natural Disasters

1 MILLION

HOMES AND BUSINESSES

are powered by

NATURAL GAS

NATURAL GAS

Serving Florida Consumers

Investor Owned Gas Utilities

TECO/Peoples Gas

Chesapeake Utilities/ Florida Public Utilities, Florida City Gas

Sebring Gas

St. Joe Gas

Municipal Gas Utilities

Special Gas Districts

Interstate Pipelines

Florida Gas Transmission

Gulfstream Natural Gas

Southern Natural

Gulf South Pipeline

Sabal Trail

Direct Use of NATURAL GAS

COMMERICIAL

Lodging	Food Service	Health Care
Groceries	Laundries & Dry Cleaners	Schools

Direct Use of NATURAL GAS

RESIDENTIAL

- Water Heating
- Cooking
- Space Heating
- Clothes Drying
- Pool/spa Heating
- Outdoor Entertainment
- Generators

Direct Use of NATURAL GAS

INDUSTRIAL

Citrus	Pulp/Paper	Phosphate
Gypsum	Concrete & Asphalt	Manufacturing

NATURAL GAS

Fuels in Florida

CNG

COMPRESSED NATURAL GAS

LNG

LIQUEFIED NATURAL GAS

















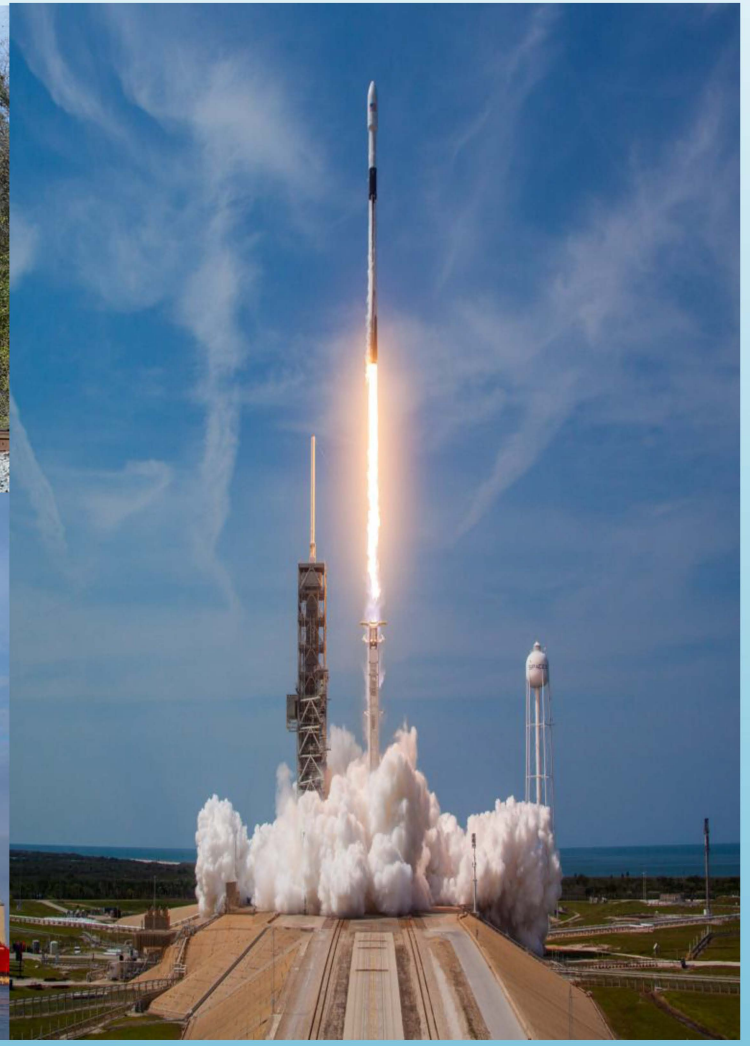
CNG/LNG VEHICLES



Crowley Maritime Supports Environmental Sustainability, Reducing 286 Million Pounds of CO_2

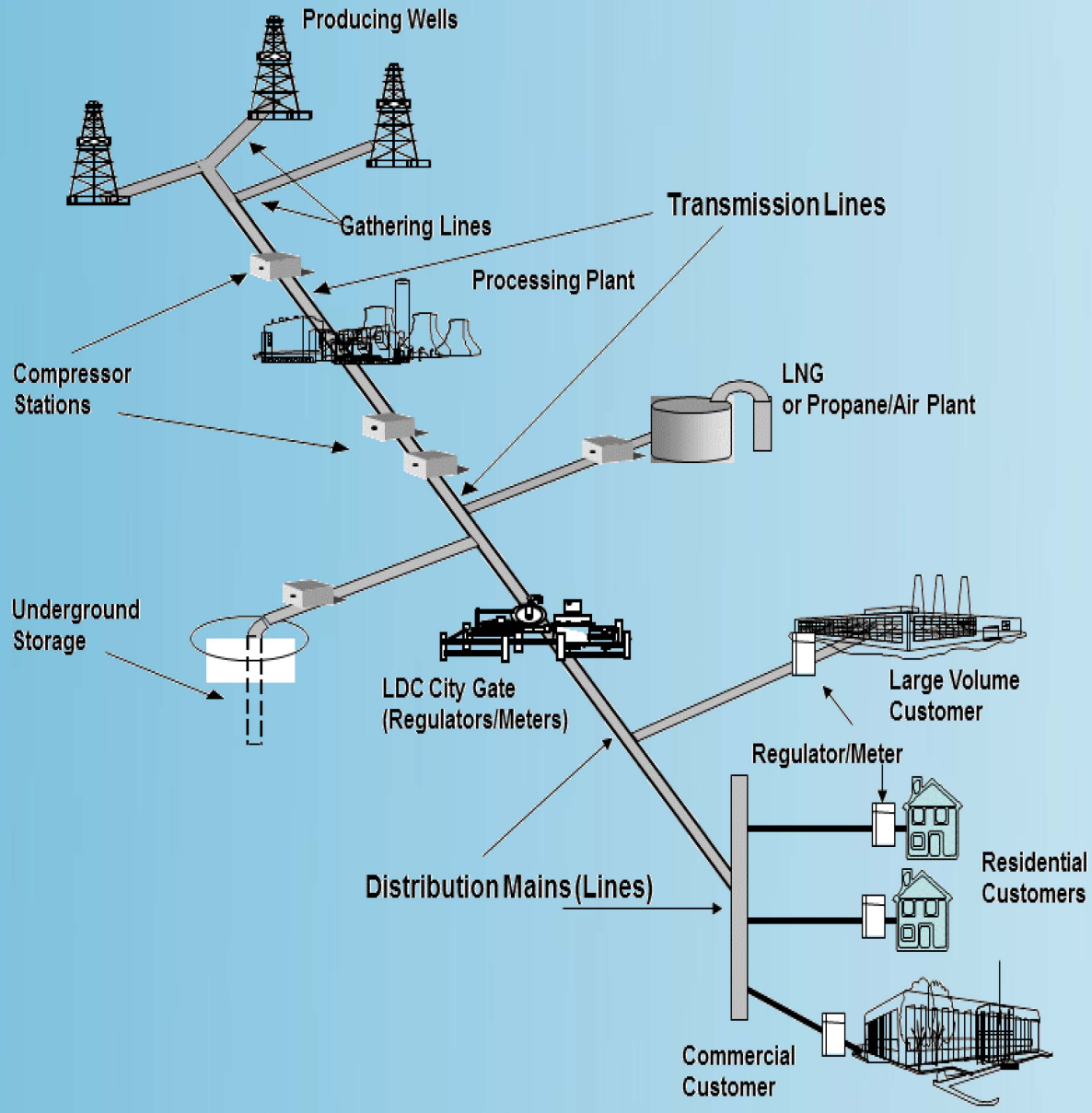






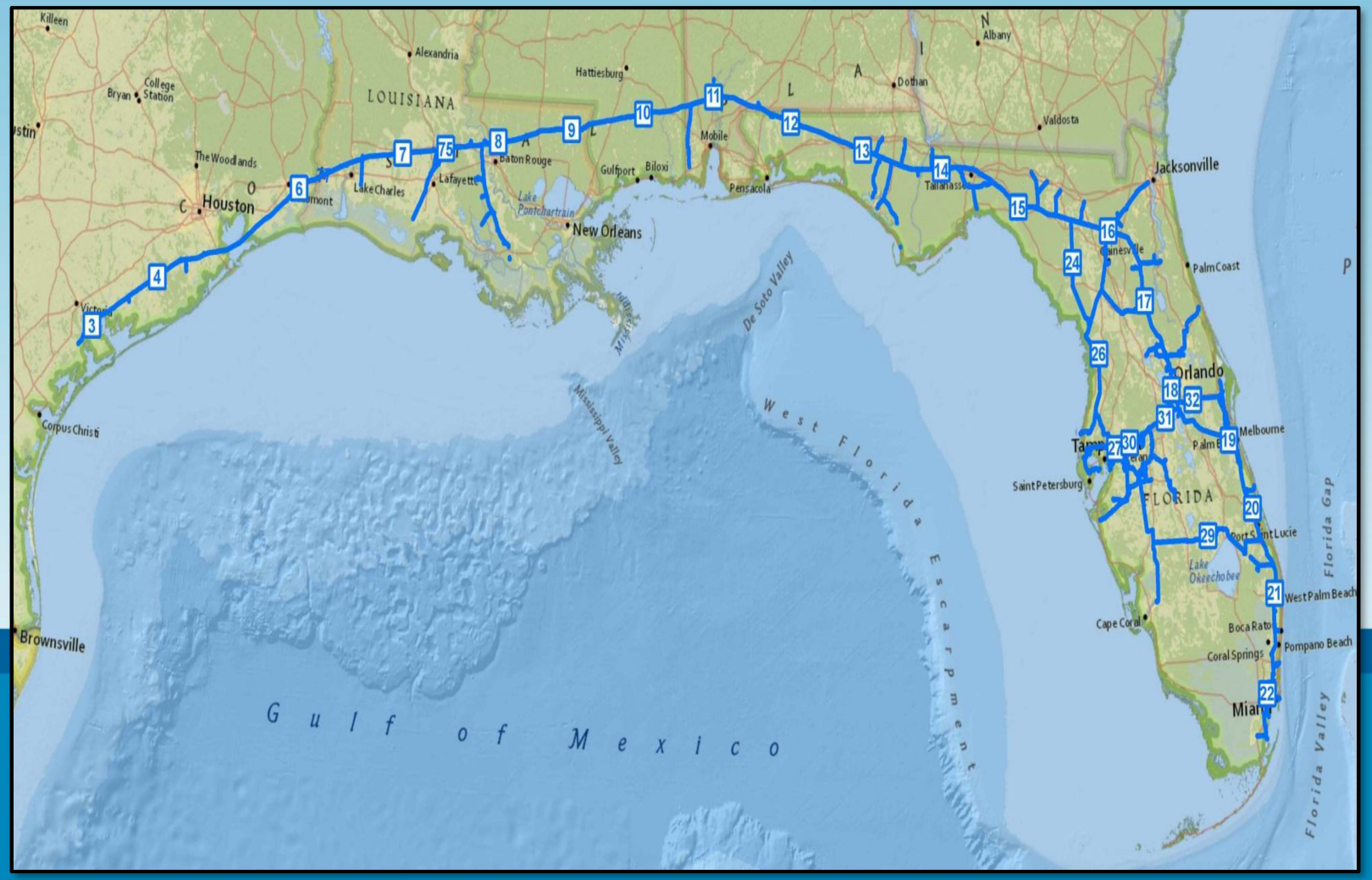
LNG

RAIL, WATER AND SPACE TRANSPORTATION

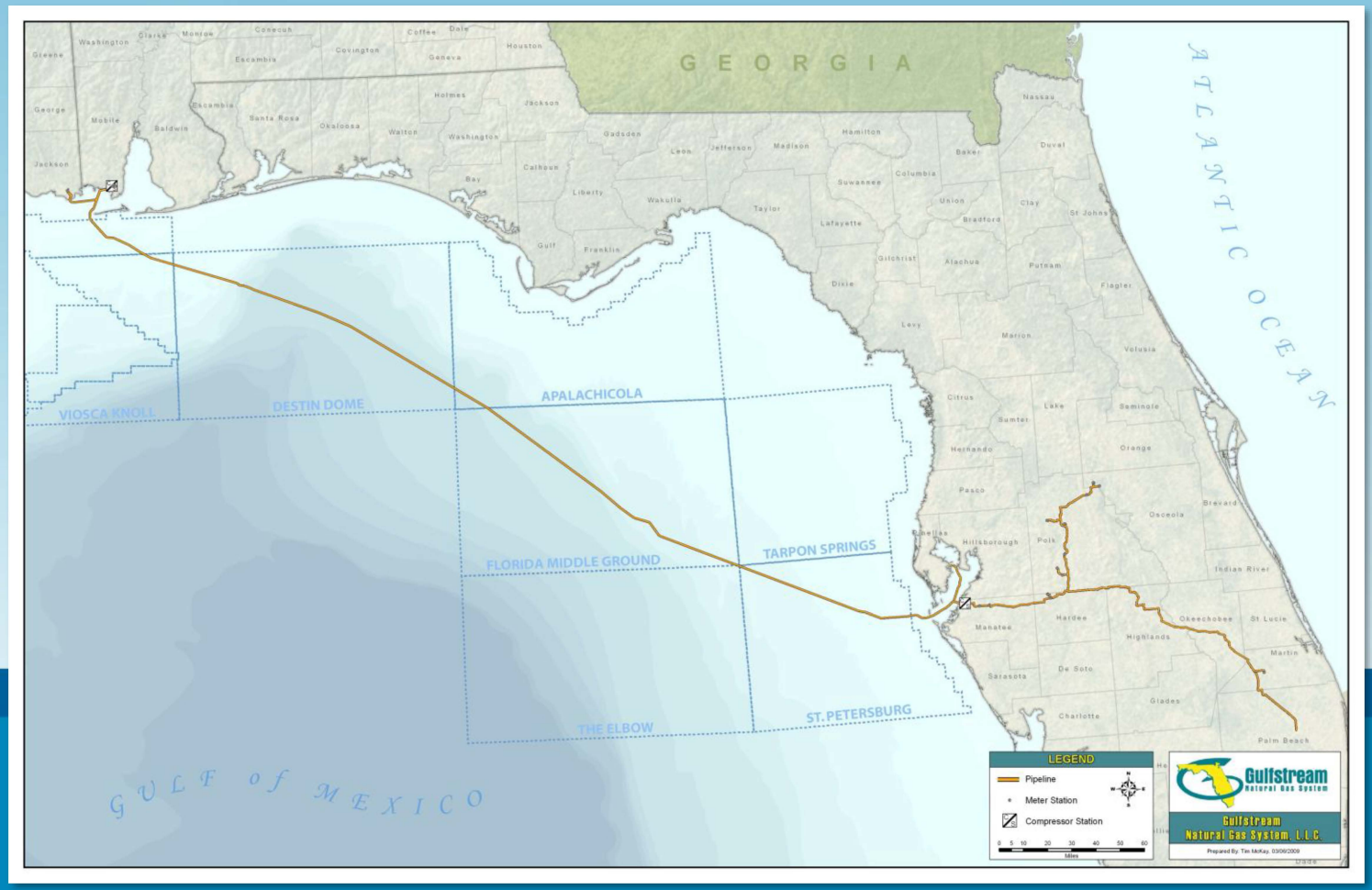


WELLHEAD TO BURNER TIP

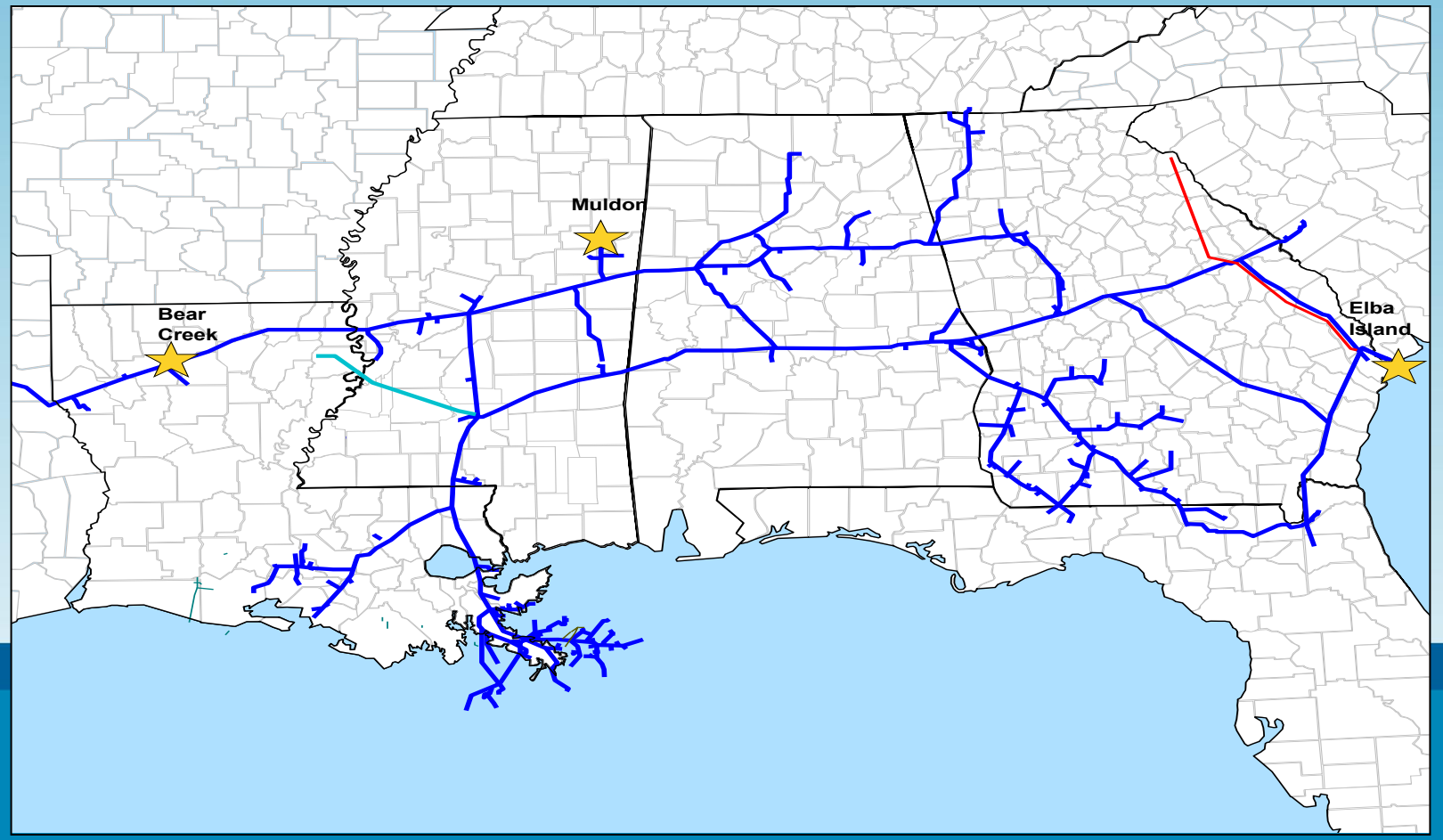
Florida Gas Transmission



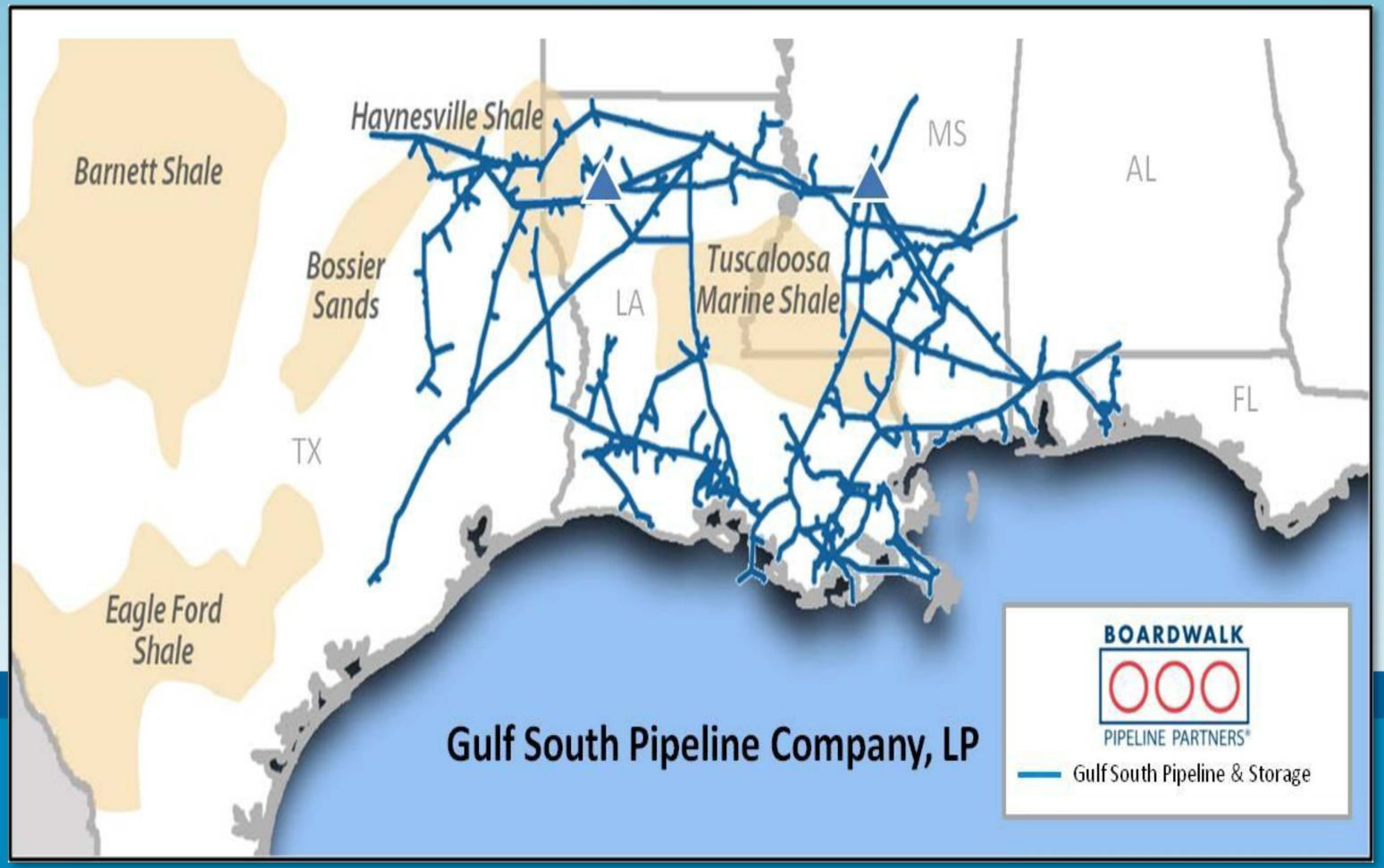
Gulfstream Natural Gas



Southern Natural



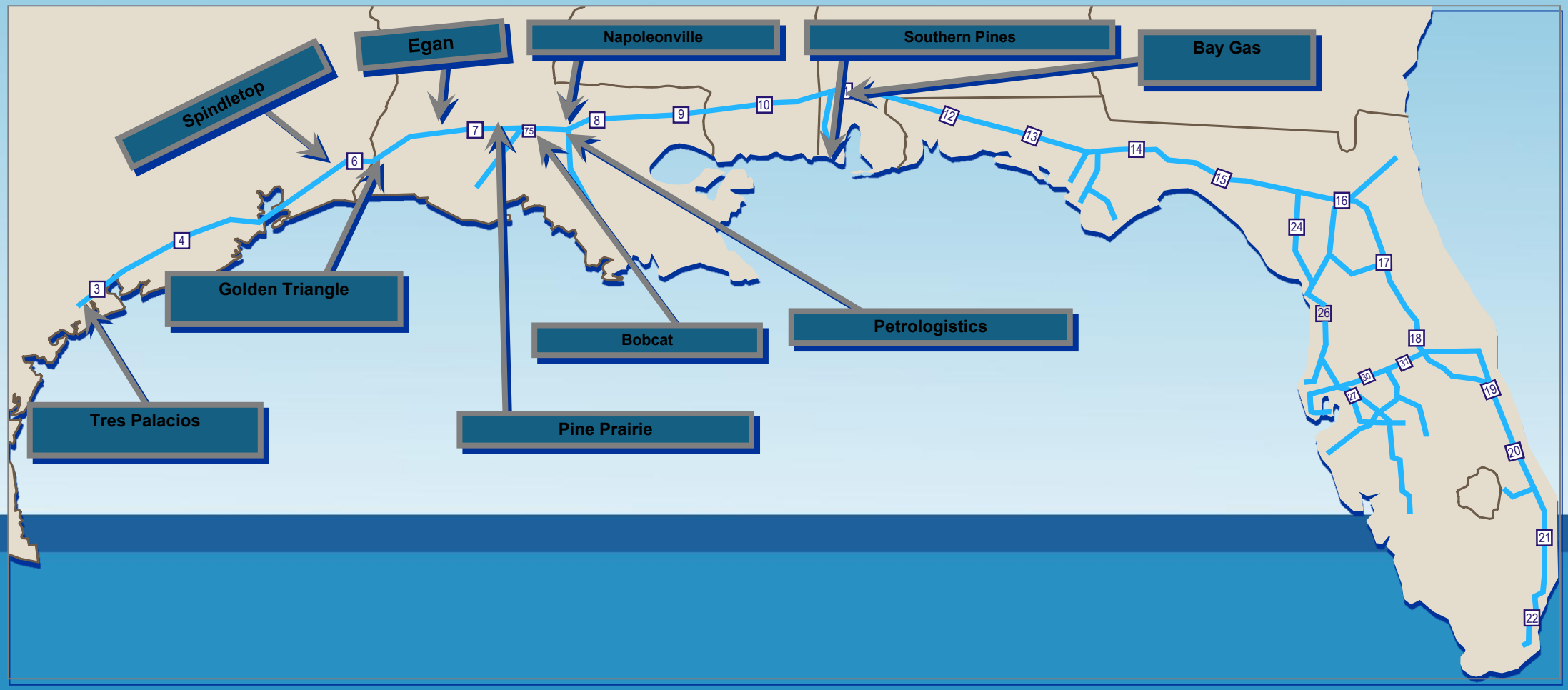
Gulf South Pipeline



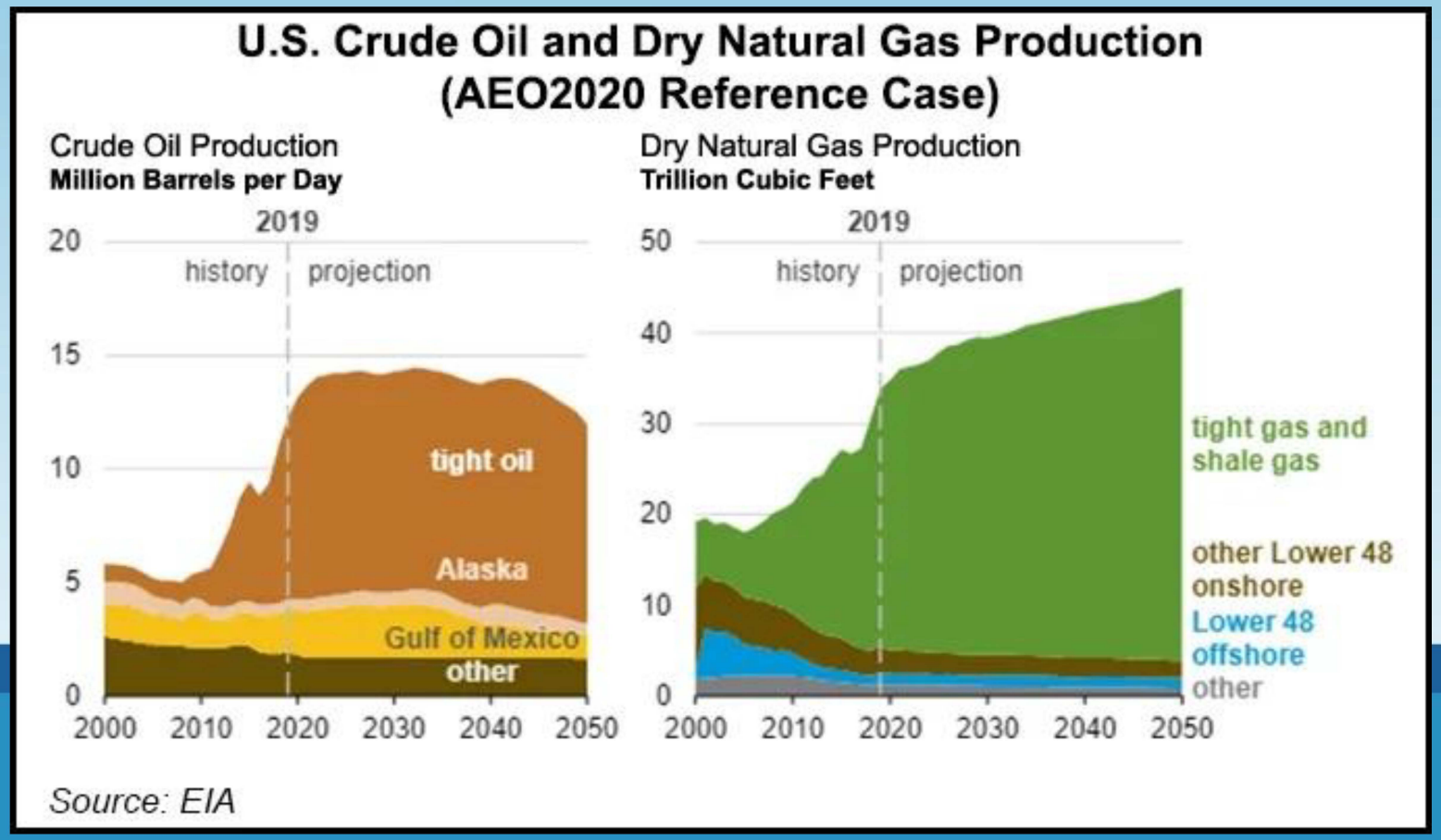
Sabal Trail Transmission



Supply Availability & Storage Connections



Growing U.S. Supply Source



Waste Types Used to Make RNG



MUNICIPAL SOLID WASTE



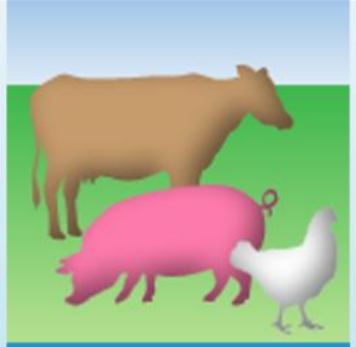
SEWAGE SLUDGE



YARD AND CROP WASTES



FOOD AND FOOD PROCESSING WASTES

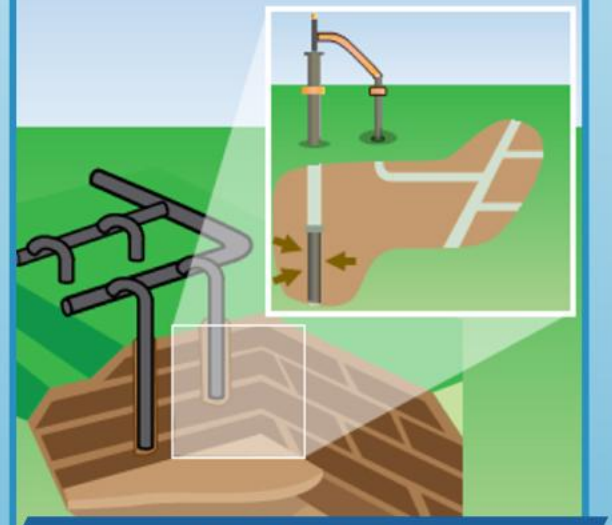


MANURE

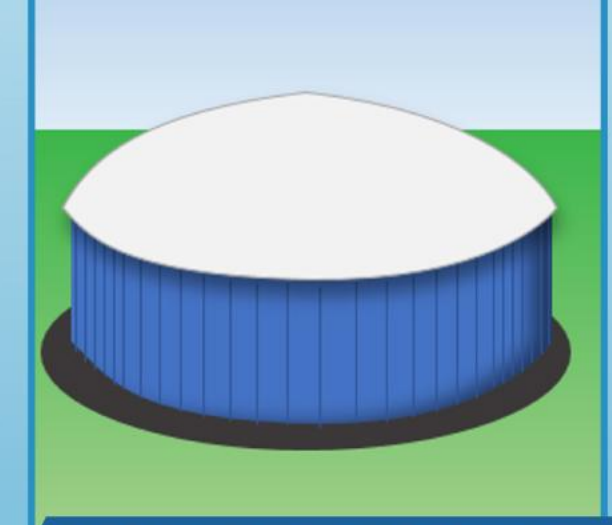
Biogas made from organic sources through anaerobic processes contains 45-65% methane.

Biogas is treated to remove moisture, particulates, contaminents and other gases (CO_2, O_2, N_2, and VOCs); this increases the methane content to 90% or greater — typically 96-98% for pipeline injection.

The resulting product is renewable natural gas.



LANDFILLS



ANAEROBIC DIGESTERS

*U.S. EPA

NATURAL GAS *limitless* opportunity

Fueling Florida's Prosperity with Resilient Energy Solutions

2 – Energy Transfer FGT

ENERGY TRANSFER

Moving America's Energy

Florida Gas Transmission

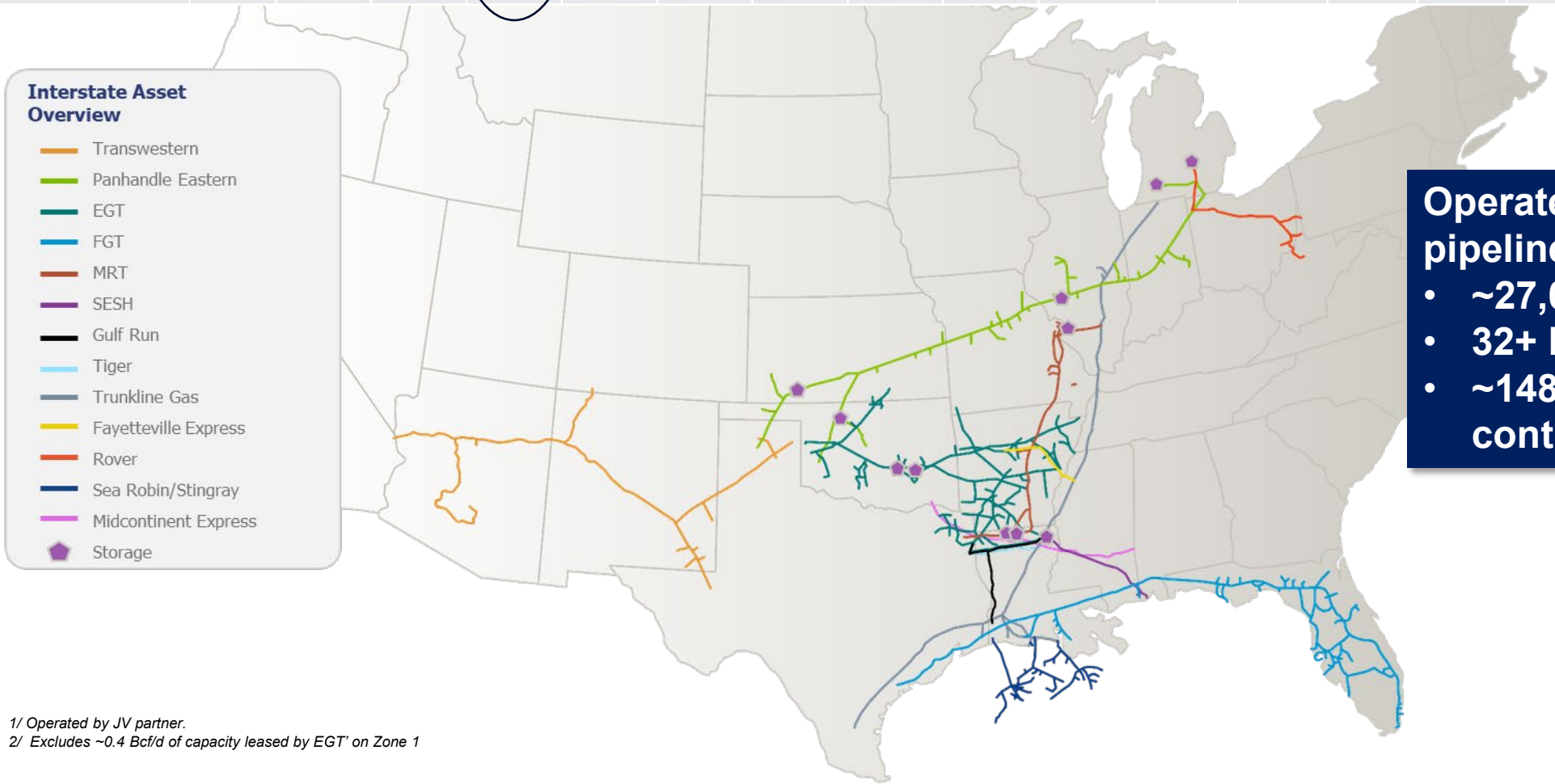
Economic Infrastructure Subcommittee Meeting

November 18, 2025



Energy Transfer
Natural Gas Pipelines - Interstate

	PEPL	TGC	TW	FGT	SR	FEP	Tiger	MEP [1]	Rover	Stingray	EGT	MRT	SESH	Gulf Run [2]	Total
Miles of Pipeline	6,300	2,190	2,590	5,380	765	185	200	510	720	335	5,700	1,675	290	335	**27,175**
Capacity (Bcf/d)	2.8	0.9	2.1	4.1	2.0	2.0	2.4	1.8	3.4	0.4	4.8	1.7	1.1	3.0	**32.5**
Storage (Bcf)	57.0	13.0	--	--	--	--	--	--	--	--	29.3	48.9	--	--	**148.2**
Ownership	100%	100%	100%	50%	100%	50%	100%	50%	32.6%	100%	100%	100%	50%	100%	



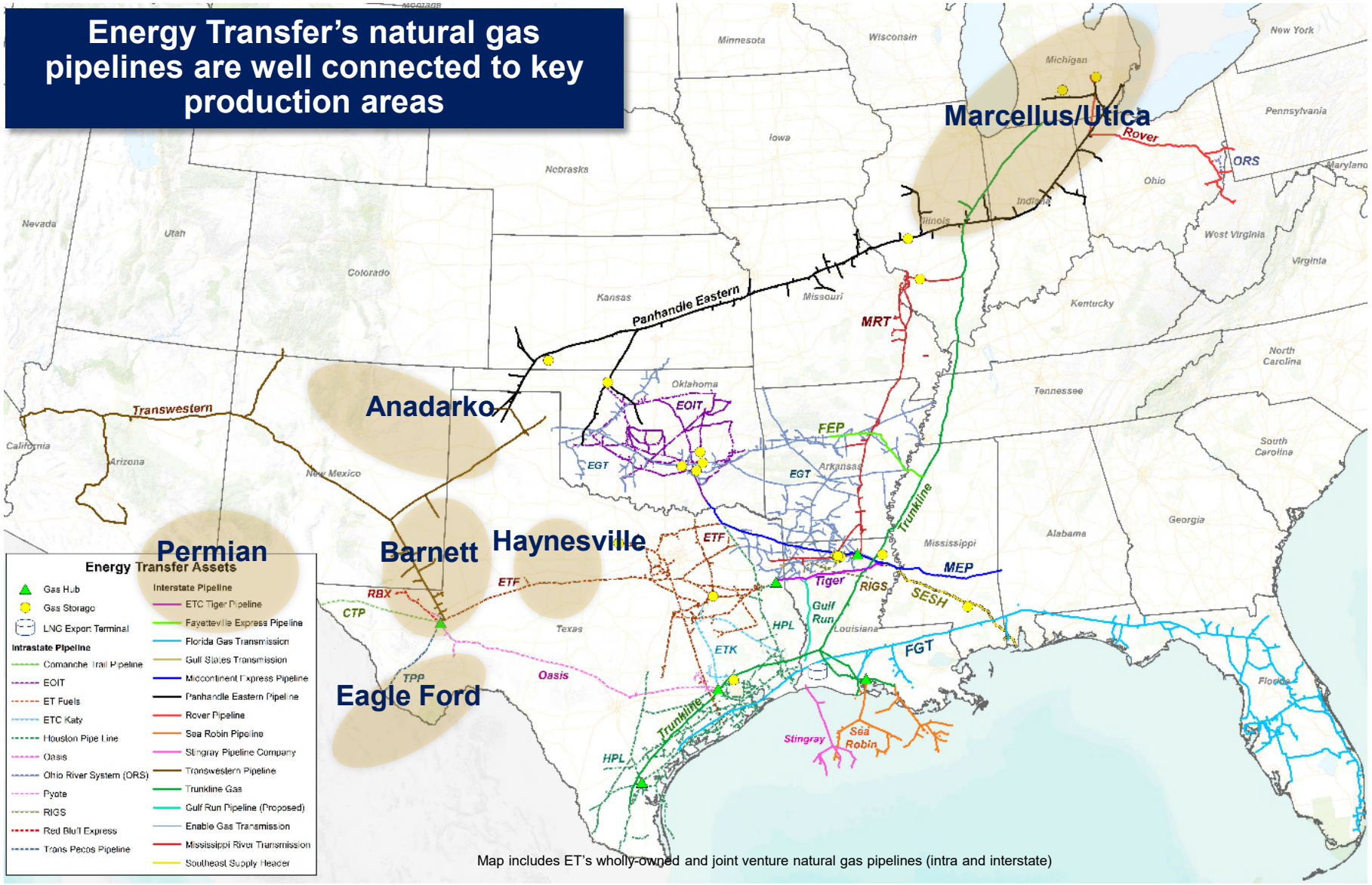
Operates 13 interstate pipelines in 20 states
- **~27,000 miles**
- **32+ Bcf/d of capacity**
- **~148 Bcf of owned or contracted storage**

Represents pipelines operated by ET

1/ Operated by JV partner.
2/ Excludes ~0.4 Bcf/d of capacity leased by EGT' on Zone 1

Supply Options
Energy Transfer's Pipeline Network Allows Enhanced Supply Access

Energy Transfer's natural gas pipelines are well connected to key production areas



Map includes ET's wholly-owned and joint venture natural gas pipelines (intra and interstate)

FGT
Economic Benefits to the State of Florida

- **Pays between $30 and $40 million every year in state property taxes**
- **Has 260 employees based locally**
- **Donates ~$30,000 each year to local communities:**
  - Schools
  - Churches
  - Youth sports
  - Summer camps
  - Food, clothing and toy drives

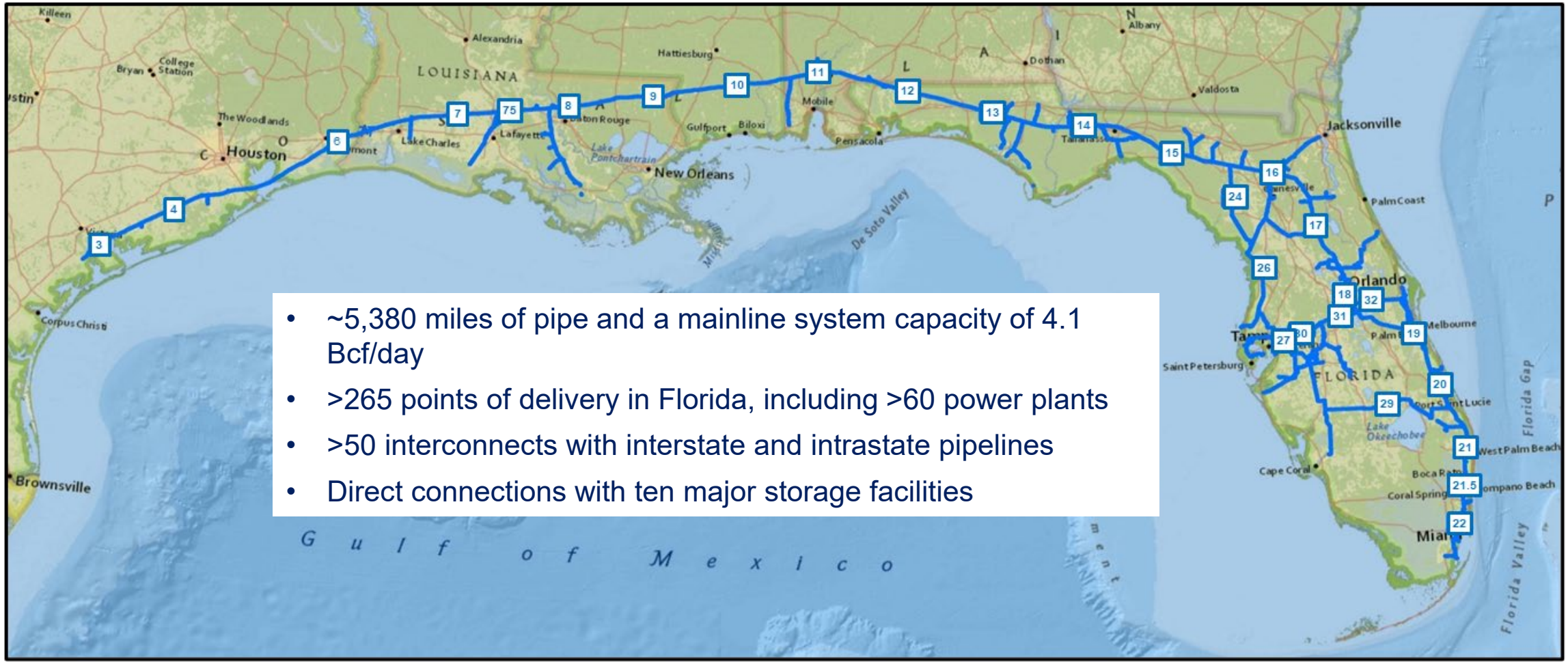




Recipients include:
- Brooker Community School
- Edgewood Children's Ranch
- Loaves & Fishes, Inc
- Union County Education Foundation
- Boggy Creek Camp



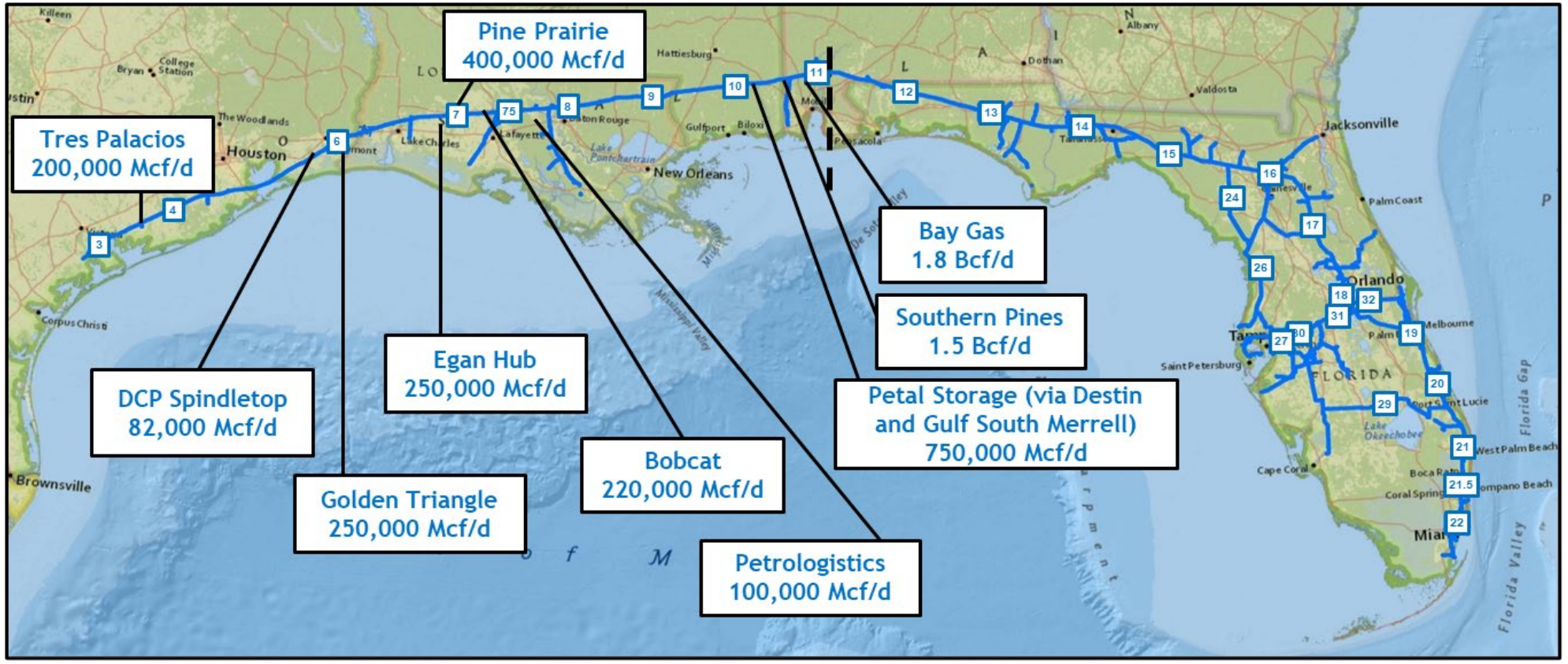
Florida Gas Transmission (FGT) System Overview



- ~5,380 miles of pipe and a mainline system capacity of 4.1 Bcf/day
- >265 points of delivery in Florida, including >60 power plants
- >50 interconnects with interstate and intrastate pipelines
- Direct connections with ten major storage facilities

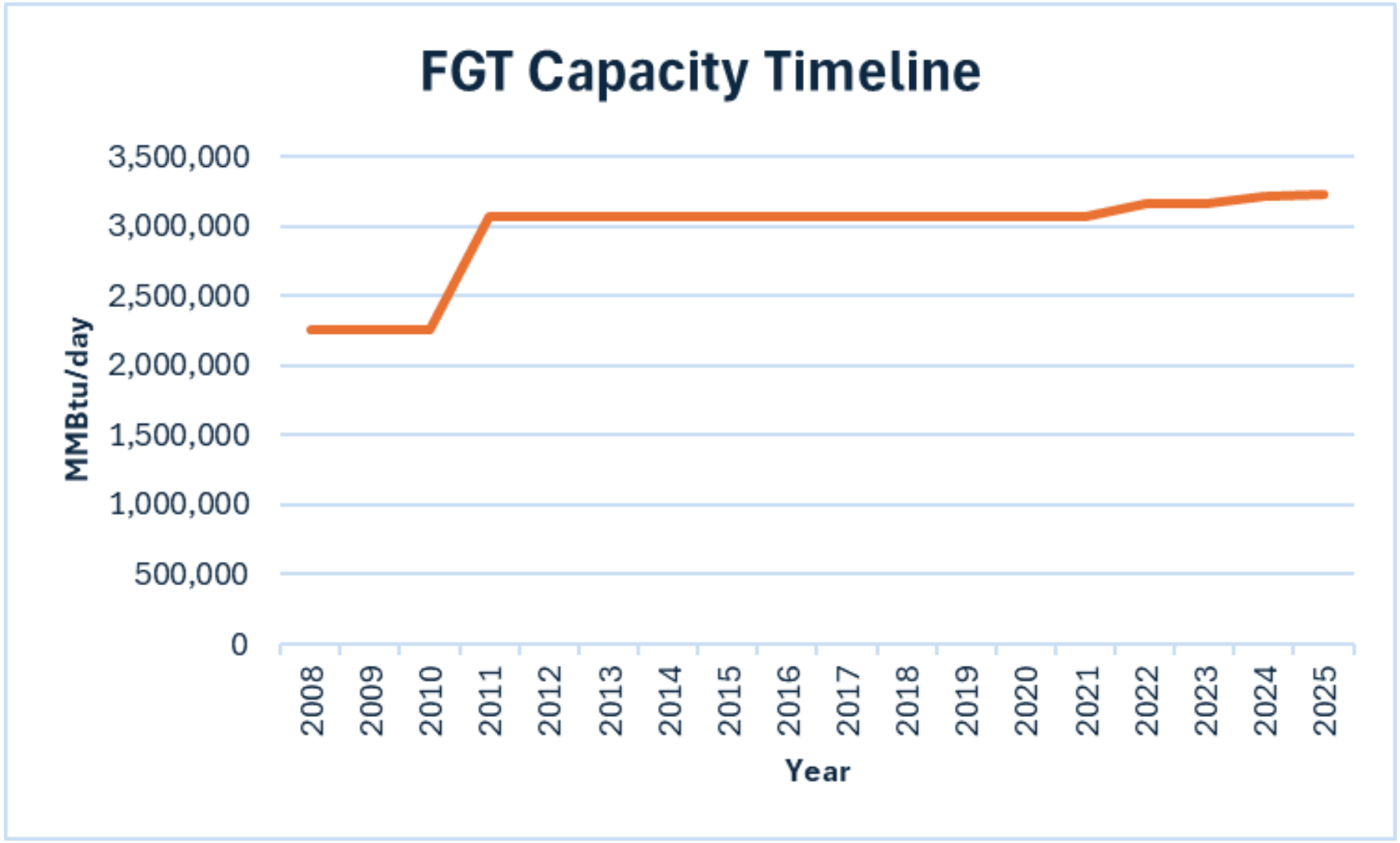
FGT is the leading provider of natural gas to the Florida market, delivering ~60% of the natural gas consumed in the state

FGT Storage Access

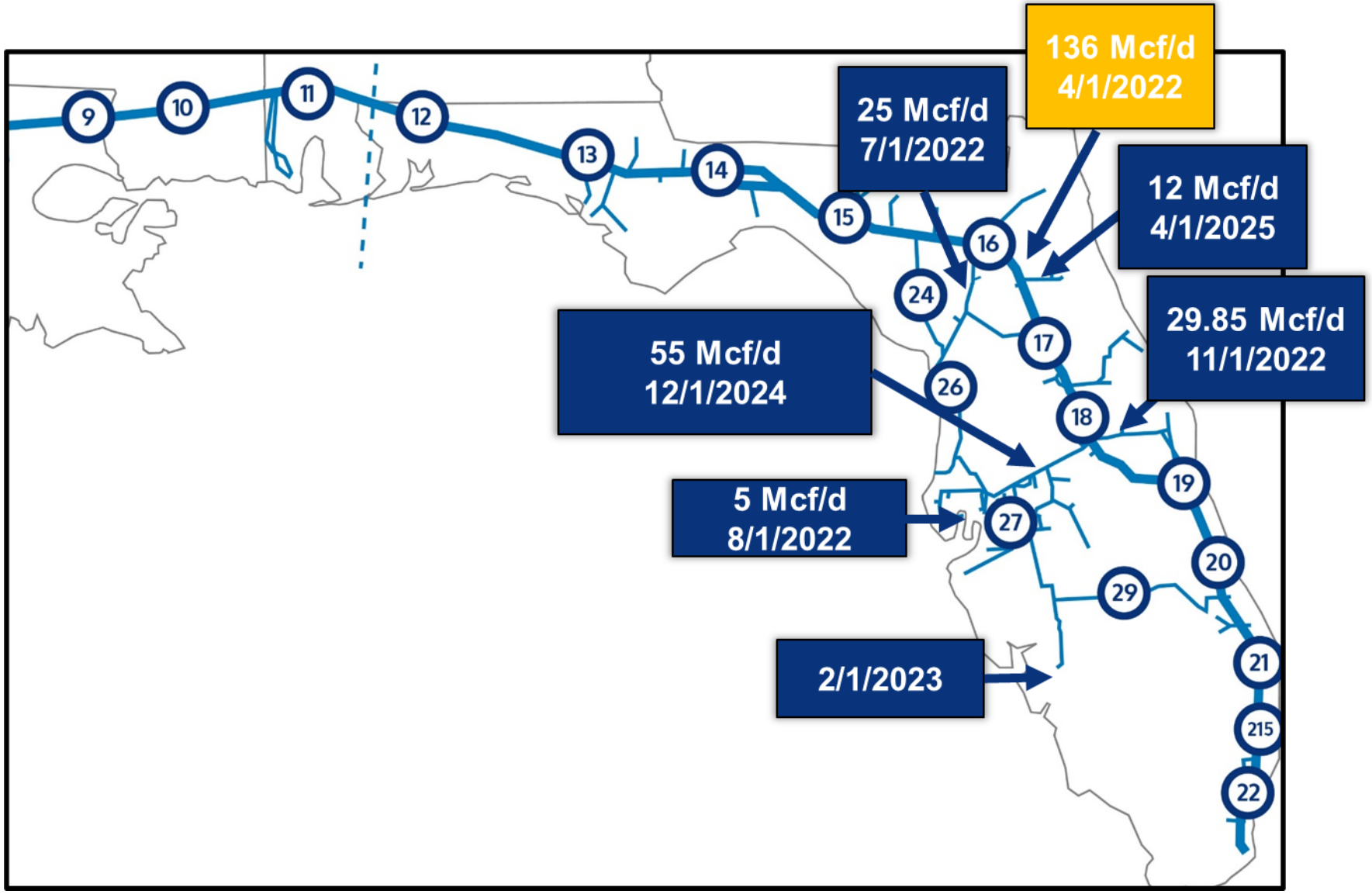


Total storage interconnect capacity of >5.5 Bcf/d

FGT Market Area Growth History



Recent Market Area Projects



FERC's Natural Gas Act Authority

- **NGA grants FERC authority to regulate "*transportation of natural gas in interstate commerce*"**
  - Includes interstate natural gas pipelines, storage facilities, LNG facilities
  - Ensures that the rates, terms and conditions of service by interstate natural gas pipelines, including storage and LNG facilities, are just and reasonable and not unduly discriminatory
- **FERC certificates construction and operation of *interstate* natural gas pipelines, including storage and LNG facilities, upon a public convenience and necessity finding; FERC also must approve abandonment of facilities**
- **NGPA – Grants FERC the authority to regulate *intrastate* gas pipelines that operate in interstate commerce**
- **FERC regulates rates and practices of oil pipeline companies engaged in interstate transportation**
  - Establishes equal service conditions to provide shippers with equal access to oil pipeline transportation
  - Establishes reasonable rates for transporting petroleum and petroleum products by pipeline
  - But it is more light-handed regulation, compared to the regulation of the electric, hydroelectric, and natural gas pipeline industries

Filing Requirements

Prior Notice Request vs. Section 7(c) Projects and Timing of Projects before FERC

- **Automatic Authorization under Blanket Certificate Regulations**
  - FERC's Blanket Certificate program enables specified routine activities, including minor construction projects, without significant FERC involvement provided the covered activities are consistent with all applicable environmental regulations
  - Minor/Simple Projects requiring *Company Based Environmental Review with Agencies*, and are anticipated to cost less than $14.5 Million
  - Process time dictated by Scope of Work and Environmental Review
- **Prior Notice Request under Blanket Certificate Regulations**
  - Minor/Simple Projects requiring basic Environmental Review, which are anticipated to cost less than $41.10 Million [*Currently in review before FERC*]
  - Temporary Limit increased to $61.65 Million, if in service by May 1, 2027
  - *Approximately* 75-day process from filing date – *Usually* Auto-Authorized @ 75-days
- **Section 7(c) of the Natural Gas Act ("NGA"), 15 U.S.C. 717(c)**
  - Projects requiring a more comprehensive Environmental Review, generally based on Project Scope and which are anticipated to cost *more* than $41.10 Million – Requires FERC issue a "Certificate" and "Notice to Proceed" before commencement of Project Activities
  - **ROUTINE**: Approximately 20 Month process from filing date without Applicant Prepared Draft Environmental Assessment (APDEA)
  - **PRE-FILING**: Approximately 14-17 Month process from filing date with an APDEA
  - **ROUTINE**: Approximately 20 Month process from filing date without pre-filing requiring an Environmental Impact Statement (EIS)
  - **ROUTINE**: Approximately 18-19 Month process from filing date with pre-filing requiring an Environmental Impact Statement (EIS)

3 - Chesapeake

11-18-2025

Florida House Economic Infrastructure Subcommittee

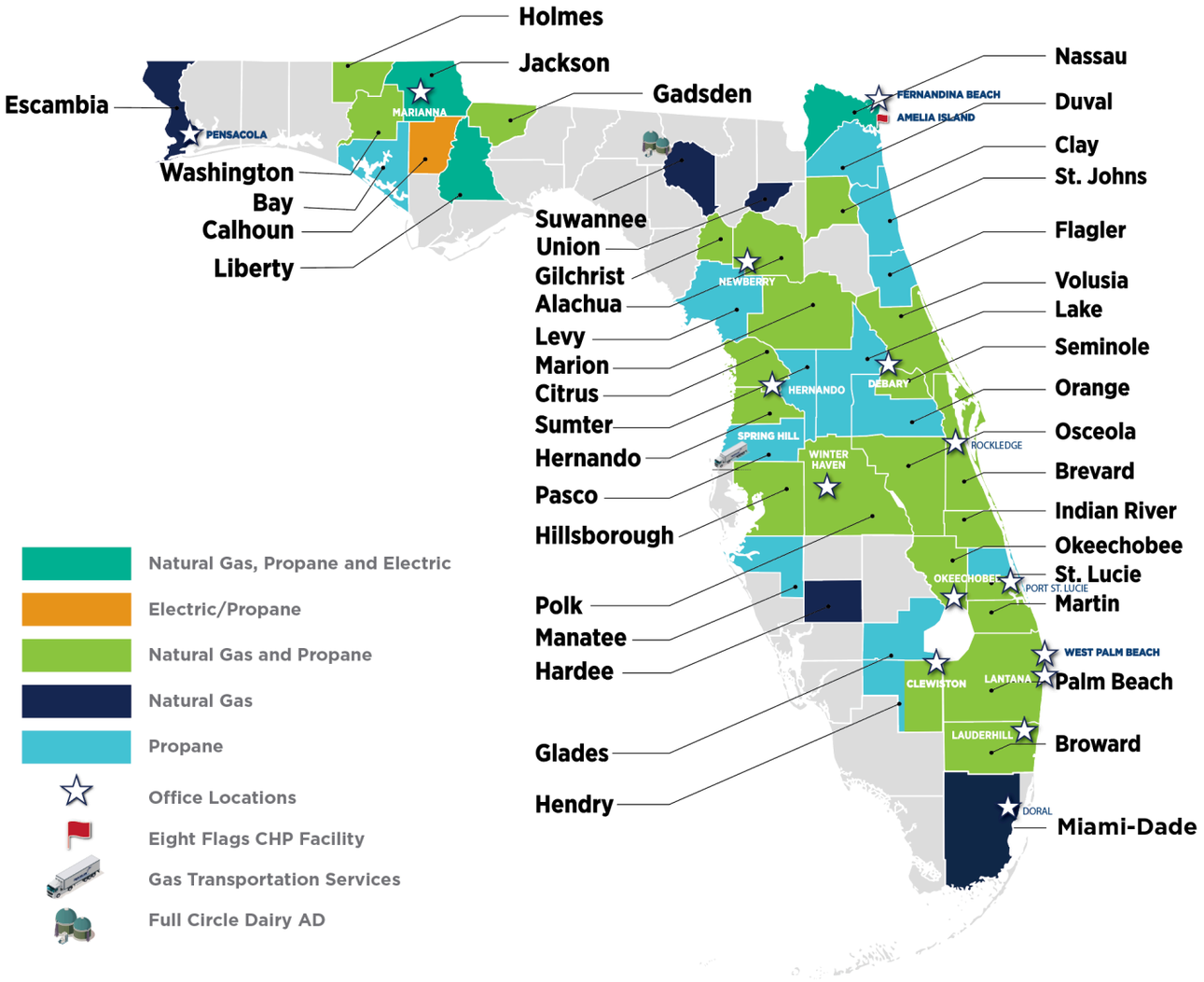
Presentations on Fueling Florida's Energy Needs

Will Haffecke, Assistant Vice President
Florida Operations



Subsidiaries of Chesapeake Utilities Corporation

Serving Florida



Local Distribution

FLORIDA CITY GAS

FLORIDA PUBLIC UTILITIES

Intrastate Transmission

PENINSULA PIPELINE

Virtual Pipeline Services

MARLIN GAS SERVICES

RNG Development

FPU RENEWABLES

Propane Distribution

SHARP ENERGY

560
EMPLOYEES

$1.9B
TOTAL ASSETS

270,239
CUSTOMERS

43
COUNTIES SERVED

$1.9B
CAPITAL INVESTMENT OVER 10 YEARS

Capital Investment in Florida

908
MILES OF DISTRIBUTION LINES

7,154
MILES OF PIPELINE



LNG Storage Plant
HOMESTEAD, FL
- Storage capacity of 270,000 gallons of LNG
- Delivery capability of 10,000 Dth/d



Propane Gas Supply
LANTANA, FL
- Exceptional propane service for businesses when natural gas is unavailable



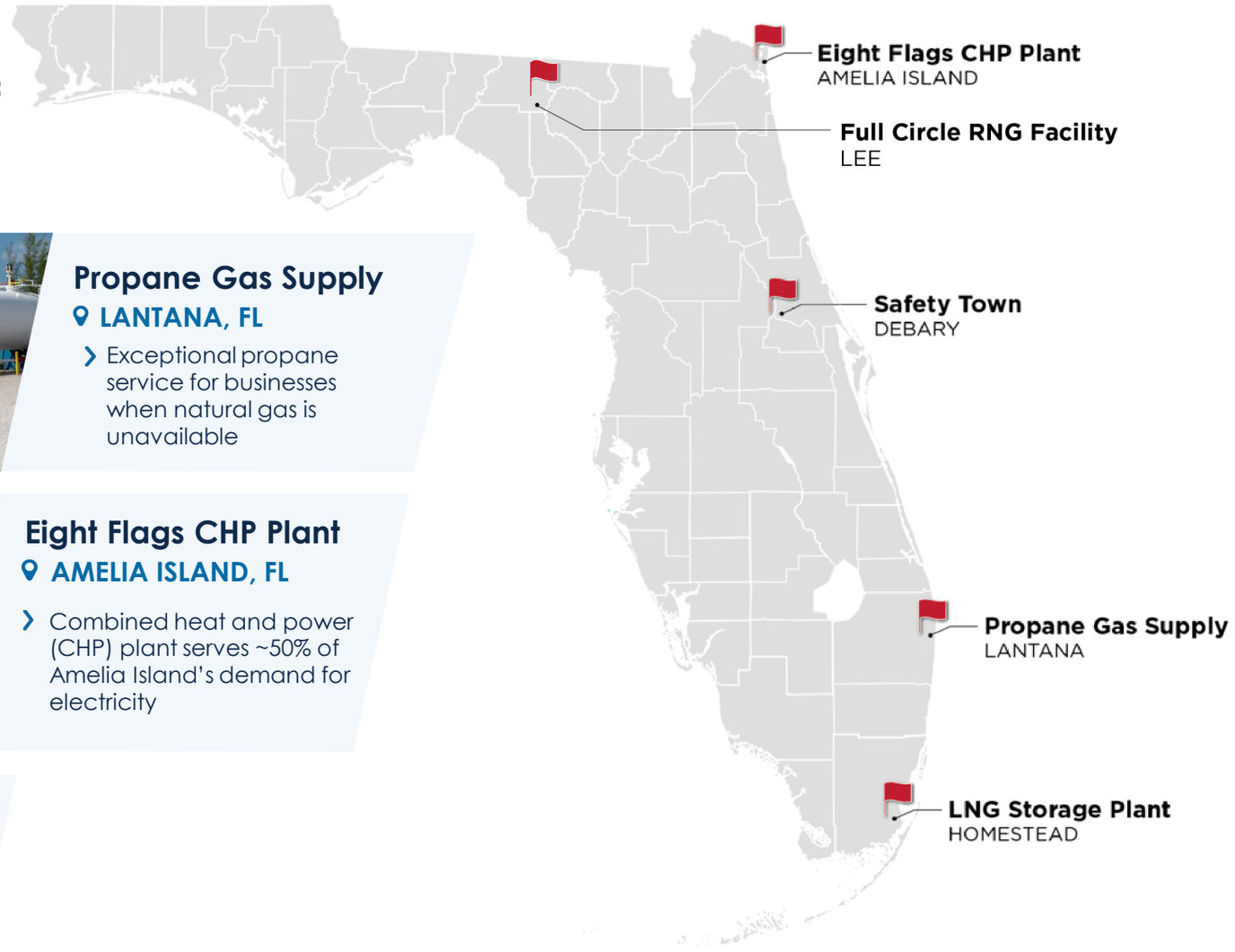
Safety Town
DEBARY, FL
- Hands-on and classroom training enabling collaboration with first responders and other community partners



Eight Flags CHP Plant
AMELIA ISLAND, FL
- Combined heat and power (CHP) plant serves ~50% of Amelia Island's demand for electricity



Full Circle Dairy RNG
Lee, FL
- Dairy waste-to-RNG facility producing 100,000 Dth/d
- RNG injected in FPU Yulee interconnect



FLORIDA CITY GAS | FLORIDA PUBLIC UTILITIES

SAFELY DELIVERING NATURAL GAS

- Implementing new technologies for leak detection, remote monitoring and safe driving
- Conducting trainings at Debary Safety Town for employees, contractors and first responders across the state
- Upgrading gas meters across service territories to improve data accuracy and operation capabilities
- Gas Control Center operates 24/7 across all Company's entities
- Enhancing reliability and safety with system upgrades and replacements: FPU's GUARD and FCG's SAFE programs
  - Total Main Line Installed: 78.7 miles
  - Services Installed: 3,342
  - Main Retired: 46.4 miles
  - Services Retired: 2,813
  - Ongoing Projects: 64



Growth and Expansion

Recent Projects to Meet Demands

Wildlight Expansion, Nassau County: various phases of gas installation for new development with construction ongoing.

Newberry, Alachua County Expansion: conversion of existing Company-owned propane community gas systems to natural gas

Miami Inner Loop Pipeline Projects: several pipeline projects to support growth, increase distribution system reliability and enhance FCG's ability to obtain gas from various access points

Central Florida Reinforcement Projects: FPU expansion in Plant City and Lake Mattie driven by supply needs from significant population growth

Florida Renewable Natural Gas Supply Projects: FCG projects, located in Brevard, Indian River and Miami-Dade counties bringing renewable natural gas produced from local landfills



FLORIDA CITY GAS | FLORIDA PUBLIC UTILITIES

Natural Gas Demand Continues to Grow

Increasing demand driven by population growth, increased commercial and industrial activity and the use of natural gas for electricity generation

- Residential growth 3.9% in 2025
- Commercial growth 1.2% in 2025
- Advances in space and maritime leading LNG fueling demands



Projects and Initiatives on the Horizon to Meet Demands

- Building out natural gas for residential and commercial use in new neighborhoods across service territories
- Natural gas expansion for Florida's Space Coast to serve fuel demands of space and maritime
- Natural gas expansions in South Florida to add supply and reliability
- Additional RNG and Marlin virtual pipeline transportation opportunities bringing renewable natural gas produced locally to distribution system
- Increased use of Compressed Natural Gas (CNG) by commercial and municipal fleets
- Consideration of LNG storage projects to meet critical energy services demand during weather-related disruptions or for high-use customers

FLORIDA CITY GAS | FLORIDA PUBLIC UTILITIES

Meeting Demands and Planning

- Our Design Day models capture projected growth trends to ensure the utilities have sufficient capacity and supply
- Ensure capacity and supply models capture projected growth and identify potential projects
  - Interstate capacity acquisition on multiple Southeast pipelines
  - Intrastate capacity projects
- Gas supply - supply procurement process focuses on system reliability and efforts to mitigate market price volatility impacts to customers
  - Supply diversification
  - Natural gas storage at Bay Gas
  - LNG supply at Homestead helps system resiliency and reliability
  - On-system RNG projects using locally sourced supply





Subsidiaries of Chesapeake Utilities Corporation

FLORIDA CITY GAS | FLORIDA PUBLIC UTILITIES

4 – TECO Peoples Gas

Fueling Florida's Energy Needs with Natural Gas

NOVEMBER 18, 2025

TECO PEOPLES GAS

Peoples Gas Company Overview

MAKING LIFE BETTER FOR OUR COMMUNITIES BY DELIVERING SAFE, RESILIENT, CLEAN, AFFORDABLE NATURAL GAS ENERGY SOLUTIONS



Market reach
Peoples Gas' service territory extends throughout Florida.



Local presence
890 team members make Peoples Gas a core part of the communities we serve.



Customer base
500,000+ diversified customers — growing at a rapid pace.



Substantial assets
14,871 miles of distribution, 6,362 miles of service lines, 277 miles of transmission.



Diversified supply
Upstream transportation contracts with multiple interstate pipelines.



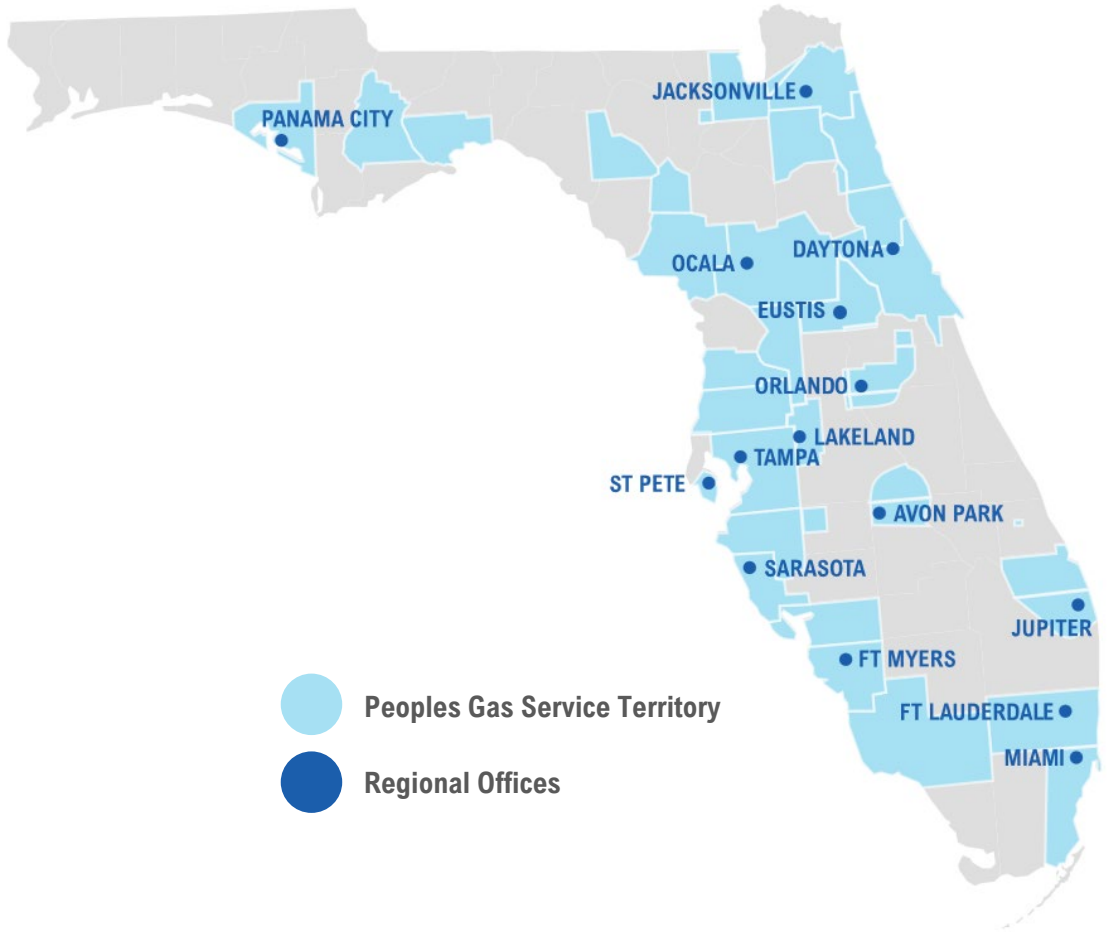
Corporate support
Owned by Emera, one of North America's largest energy companies.

Peoples Gas Company Overview

PEOPLES GAS IS COMMITTED TO SAFE AND RELIABLE OPERATIONS ACROSS FLORIDA

With a legacy dating back to 1895, Peoples Gas has grown to become Florida's largest provider of safe, resilient, clean, and affordable natural gas energy solutions.

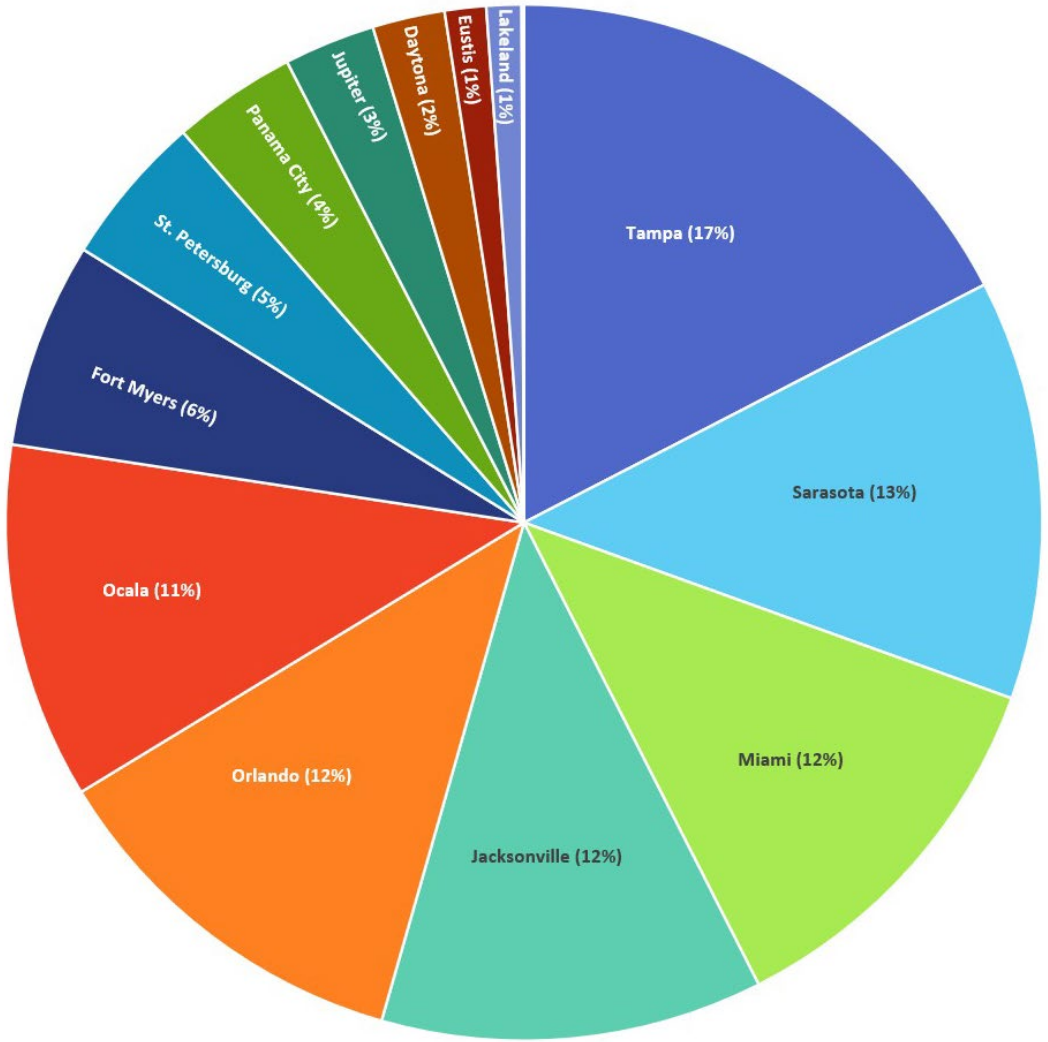
- Strong safety culture and industry leader in safety
  - #1 priority for our employees and contractor partners
- Serving Florida from 14 service areas across the state
- Innovative practices for safe, efficient system and delivery of natural gas
  - GPS and barcoding
  - Advanced leak detection
  - State-of-the-art system monitoring and control center
  - Targeted damage prevention awareness outreach
  - Updated mobile command vehicle



Peoples Gas Company Overview

PEOPLES GAS IS A LEADER IN CUSTOMER SERVICE

- Currently serving more than **500,000 customers in all major metropolitan areas of the state**
  - 91% Residential
  - 9% Commercial
- **Ranked #1 in** residential customer service by J.D Power for the **11th year** in a row and **#1 for Brand Appeal**
- Named as one of the **Most Trusted Brands in the nation** for the **11th time** based on results from the 2024 Cogent Utility Trusted Brand & Customer Engagement: Residential study by Escalent, as well as an **Environmental Champion** (9 years) and **Customer Champion** (11 years)



CUSTOMERS BY SERVICE AREA

Natural Gas in Florida

UNIQUE MARKET AND UNIQUE CUSTOMER NEEDS

- Energy of **choice**
- Backbone of **healthcare, hospitality and tourism** industries
- Produces more than **75% of the state's electricity**; helps in **reducing overall carbon emissions**
- **Energy reliability and resiliency** is essential in our unique tropical climate



Always Ready to Respond

PREPAREDNESS IS A YEAR-ROUND FOCUS

MAJOR FLORIDA WEATHER INCIDENTS IN THE PAST DECADE

- 2017 – Hurricane Irma – Tampa
- 2018 – Hurricane Michael – Panama City
- 2022 – Hurricane Ian – Fort Myers
- 2023 – Hurricane Idalia – St. Petersburg, Tampa
- 2024 – Hurricane Helene – St. Petersburg, Tampa
- 2024 – Hurricane Milton - St. Petersburg, Tampa, Sarasota

SYSTEM RESILIENCY

- 2024: Out of more than 500,000 customers, just 1,400 were without gas service after two major hurricanes – mostly due to structural damage and not an issue with our ability to deliver



Assessing damage on Fort Myers Beach after Hurricane Ian in 2022.

Strategic Growth

FOCUSED ON RELIABILITY, RESILIENCY, AFFORDABILITY AND LAYERED ENERGY SOLUTIONS

FLORIDA'S CRITICAL INFRASTRUCTURE

- Power Generation
- Military
- Healthcare
- Sea Ports
- Transportation
- Data and Systems

DISTRIBUTED ENERGY SOLUTIONS

- Microgrid
- Combined Heat and Power
- Chiller
- Gas Heat Pump

EMERGING AREAS

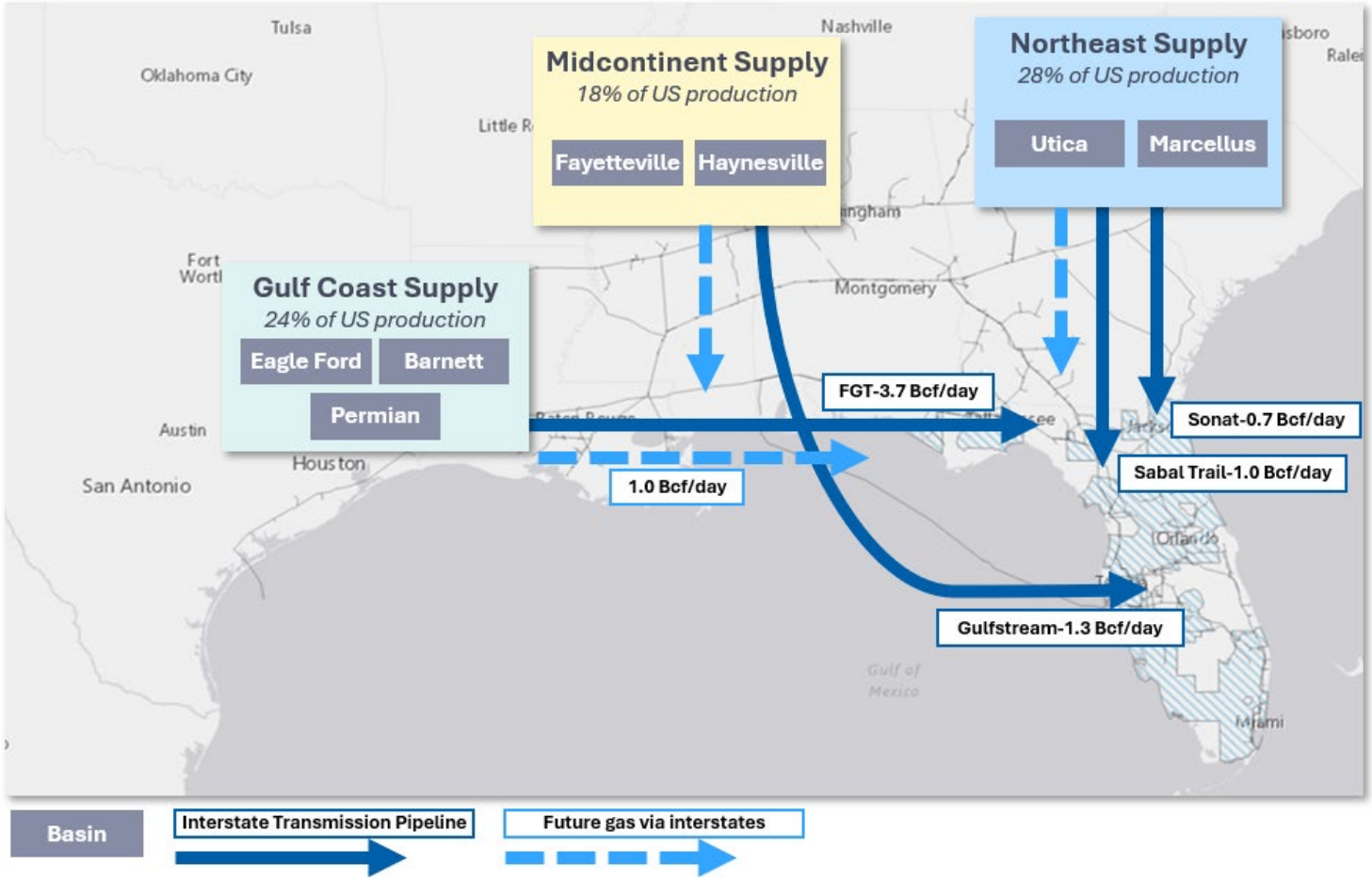
- AI and data centers
- Growing generator load, particularly in coastal areas

Stable Supply Supports Florida's Energy Reliability

FOUR MAJOR PIPELINES PROVIDE SUFFICIENT CAPACITY AND SUPPLY FROM DIVERSE BASINS TO MEET CURRENT AND FORECASTED DEMAND, WITH FLEXIBILITY TO SUPPORT GROWTH AND LNG EXPORTS.

Florida is served by four major interstate pipelines with a combined capacity of 6.7 Bcf/day, compared to average in-state demand of approximately 4.5 Bcf/day, representing about 70% utilization.

- Provides a meaningful buffer to accommodate seasonal peaks, industrial growth, and emerging LNG export dynamics.
- With the growing LNG demand in the Gulf and data center demand, future diversity of gas supply in support of customers will be critical.
- Florida Gas Transmission (FGT) is considering expansion of its pipeline system in Florida to flow more gas into the state. Other interstate systems are likewise considering expansions to bring gas from other basins.



Sustainability in Action

INVESTING IN LOWER-CARBON ENERGY SOLUTIONS



RENEWABLE NATURAL GAS

We build, own and operate RNG facilities to move supply across our system and extend access and use.



COMPRESSED NATURAL GAS

Peoples Gas serves 54 CNG stations across Florida, and we've helped fleets reduce emissions, improve reliability and lower costs.



LIQUEFIED NATURAL GAS

We help Florida ports fuel industries that need a more sustainable option, and we're investing in infrastructure to expand access and use of LNG to improve reliability and resiliency of the state's natural gas system.


THANK YOU
TECO
PEOPLES GAS



Driving Florida's Energy Future

Brandon Stankiewicz, Vice President, Universal Solar & Storage
Florida Power & Light Company
November 18, 2025

FPL generates electricity from diverse sources, creating an efficient and resilient system to serve customers at the lowest possible cost









- Generation sources include:
  - **Fuel-efficient natural gas** plants
  - Safe, **reliable nuclear** plants
  - Cost-effective **solar generation**
  - New deployment of **battery storage**

- Since 2001, FPL has saved customers more than **$16 billion** in fuel costs
  - In 2024, FPL's fuel-saving technologies saved customers **$867 million**
  - Solar alone has delivered over **$1 billion in fuel savings since 2016**

FPL continues to invest in low-cost solar energy and is now adding battery storage into its diverse mix of power generation sources

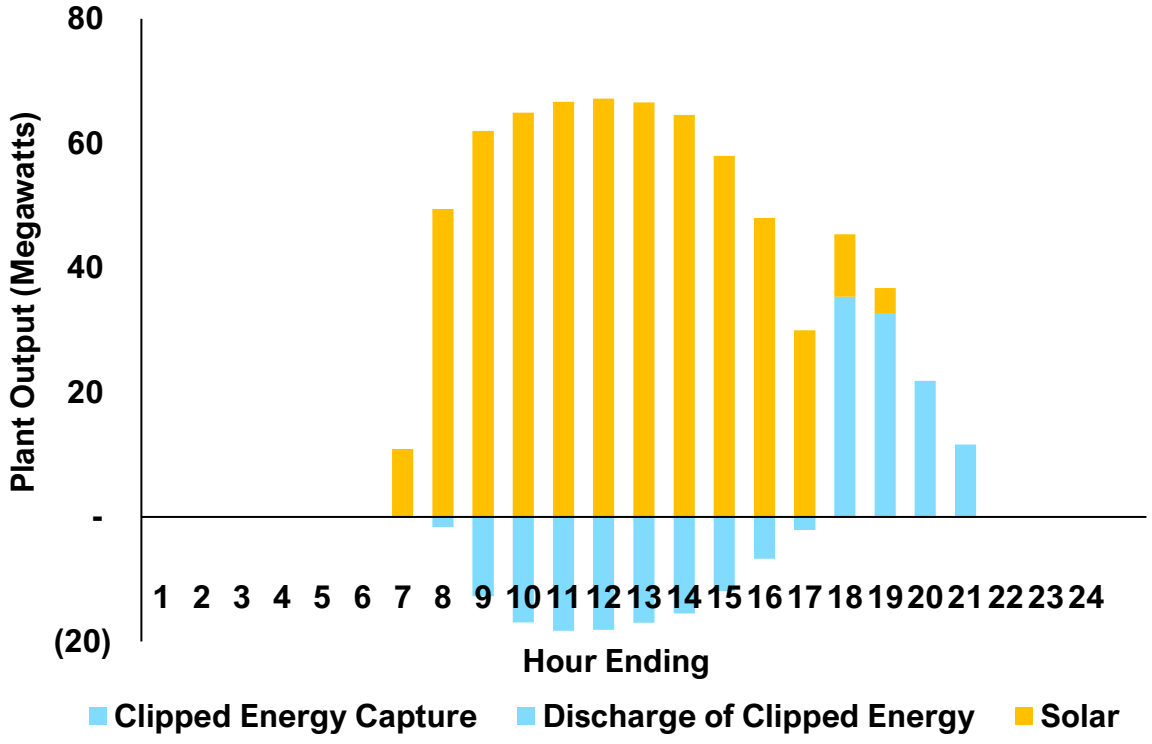




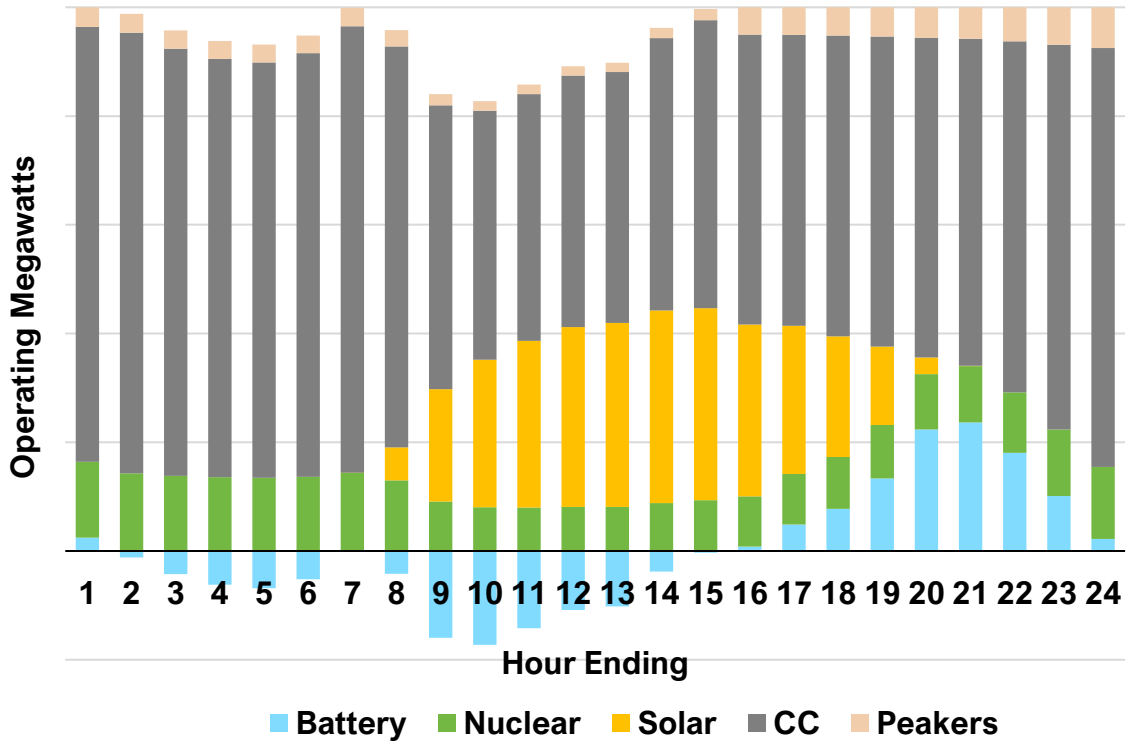
- FPL solar energy centers operating today generate enough energy to power **more than 1.5 million homes** across Florida each year
- As a generation option, **solar** provides several advantages:
  - Scalable – can add MW to closely match expected load growth
  - Speed to market – can permit and construct typical site within 24-months
  - Lowest cost option relative to alternatives based on today's pricing
- Paired with **battery storage**, FPL can capture "free" energy for use during peak periods, increasing reliability

Solar and battery storage can be combined to serve a large portion of load during the day, reducing fuel consumption fleet-wide

Example - Solar + Battery Plant Output



Example - System Wide Plant Dispatch




FPL®