

Residential Natural Gas Market Survey 2000



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Residential Natural Gas Market Survey

2000

53rd Annual Survey
Natural Gas Utility Industry
United States

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INTRODUCTION

This year's report is the 53rd annual *Residential Natural Gas Market Survey* conducted by the American Gas Association (AGA). The data collected for 2000 provides a unique and comprehensive portrait of the residential natural gas market. Detailed information is presented by state and region, including customers, market share, inventory additions from new homes, and conversions from alternative fuels. Company-specific data are reported in Appendices 1, 2 and 3. Appendix 4 presents natural gas market shares data for the metropolitan statistical areas.

A total of 43 natural gas utility companies responded to this year's survey. This is a decline from the 64 utilities that responded to the 1999 survey. Some of the decline in the survey response rate can be attributed to mergers and acquisitions, and downsizing in the natural gas industry. Company-specific data were derived from the Energy Information Administration's Form 176 database. In addition, some state total data were derived from AGA's Gas Facts: 2000 survey responses. Individual company data are listed by region and state in Appendices 1, 2 and 3. Market share data by metropolitan statistical area are presented in Appendix 4. Please note that some tabular data may not add up to the totals shown due to rounding.

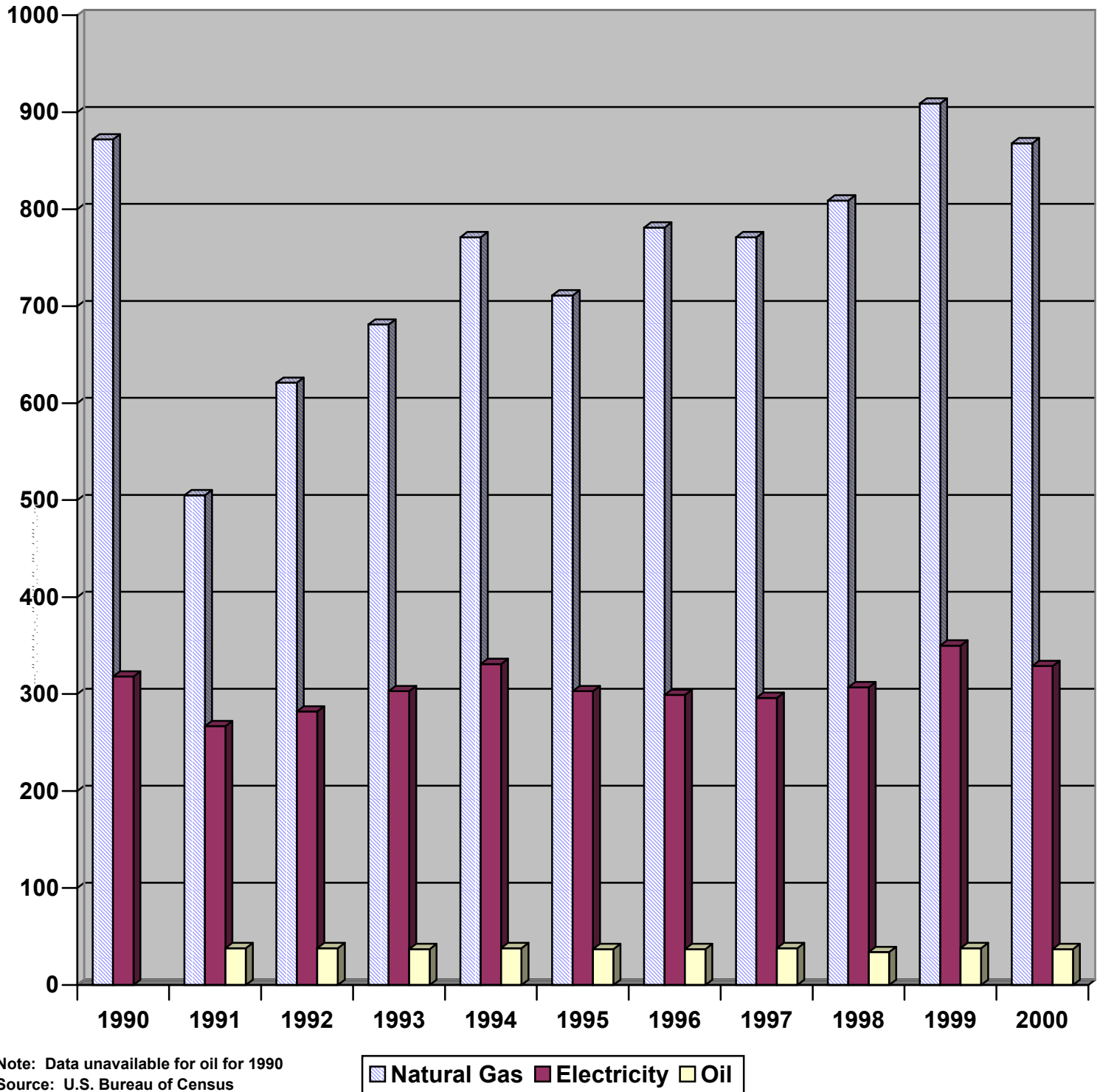
Incorporated in the survey results are data regarding new private housing completions from the U.S. Bureau of the Census. The source of these data is different from the statistics compiled from the survey respondents and should be evaluated separately.

Our thanks go to those companies participating in the *2000 Residential Natural Gas Market Survey* information-gathering effort. Their cooperation and support are the essential elements that have made this publication a primary source of natural gas utility industry data and an important industry reference.

I. EXECUTIVE SUMMARY

- The residential natural gas customer count reached 59 million in 2000, or 61 percent of total U.S. households. Approximately 83 percent of these natural gas customers use natural gas for house heating purposes.
- The natural gas share of new single-family housing completions matched or exceeded the electric share in all regions. Gas single-family homes completed in 2000 registered a 70 percent market share, the same as in 1999. New gas single-family home completions have exceeded all other energy sources for at least ten years (see Figure 1). When both single and multi-family units are considered, the gas share of new housing completions increased slightly to 65 percent compared to the previous year. The overall electric share fell to 32 percent in 2000.
- New additions to the number of residential customers totaled almost 971,000 in 2000. This represents an increase of 1.6 percent compared to last year.
- The 2000 survey results showed that roughly 12 percent of all new customers came from homes converted from another energy source to natural gas. The respondents were asked to provide a breakdown of conversions by fuel type. Based on these data, fuel oil conversions to natural gas accounted for 22 percent of all conversions. Approximately 35 percent of conversion customers had previously heated with electricity. The respondents were unable to identify the previous heating fuel for 43 percent of the homes.
- The overall market share for natural gas space heat in existing homes has remained constant at roughly 50 percent for the last twelve years. Natural gas water heaters have maintained a similar market share as well, while shares for gas cooking and clothes drying fell slightly to 35 percent and 22 percent, respectively.
- During 2000, almost \$2.2 billion went to assist low-income households pay their energy bills or weatherize their homes. Most of the funding came from LIHEAP, with \$1.1 billion in normal appropriations and \$370 million in emergency funds. Utilities, both electric and natural gas, accounted for more than 17 percent (\$380 million) of the total in the form of discounts, waivers, forgiveness of arrearages, and weatherization programs.

Figure 1
Natural Gas vs. Electricity and Oil
Single Family Home Completions 1990-2000
(Thousand Homes)



II. UNITED STATES HOUSING MARKET IN 2000

New Housing Completions

Additions to the U.S. housing market decreased 3.8 percent from 1999 to 2000, with new completions totaling 1,574,000.

Natural gas continued to dominate the new single-family home market. According to the U.S. Bureau of the Census, new gas single-family completions numbered 868,000 in 2000, down from 909,000 in 1999. This 4.5 percent decrease in gas units was about the same decrease for all single-family home completions, resulting in the same gas market share of 70 percent in 2000 as it was in 1999. The 2000 electric market share of new home completions remained at 27 percent. Gas single-family home completions exceeded electric completions for the fifteenth consecutive year.

In the new multi-family housing arena, gas market share increased three percentage points, from 42 to 45 percent. The total number of multi-family units completed in 2000 rose to 332,000 from 329,000 in 1999. Market share for electricity fell by two percentage points compared to 1999, reaching 54 percent in 2000. Natural gas multi-family units numbered 149,000 compared with 180,000 electric units in 2000.

When both single and multi-family units are considered, gas house heating market share of new housing in 2000 increased to 65 percent. The overall 2000 electric house heating market share fell to 32 percent.

Tables 1 and 2 present the regional breakdown of units completed by type of fuel. Gas single-family home completions matched or outnumbered electric completions in all of the four regions. The gas market share in the Northeast, Midwest, South and West regions was 65 percent, 92 percent, 50 percent and 91 percent, respectively. Market share for natural gas increased two percentage points in the Midwest and one percentage point in the West compared to 1999. In the multi-family sector, gas completions were higher than electric in all regions but the South. All but the Midwest region exhibited growth in market share in this sector compared to 1999.

Table 3 shows new housing market share data from 1990 to 2000. The Census data show that overall, new housing market share of gas has been higher than electric for at least the last ten years. The market share went from 55 percent gas and 38 percent electric in 1990 to 65 percent gas and 32 percent electric in 2000.

TABLE 1

2000 PRIVATE HOUSING COMPLETIONS BY HEATING FUEL (Thousands of Buildings)

Single-Family	Share	Units	Northeast	Midwest	South	West
Natural Gas ^a	70%	868	79	248	282	259
Electricity	27%	329	7	18	282	22
Oil	3%	37	34	1	2	S
Other	1%	8	S	2	1	5
Subtotal	100%	1,242	120	269	566	286
Multi-Family						
Natural Gas ^a	45%	149	24	45	34	46
Electricity	54%	180	1	20	129	30
Oil	Z	1	1	Z	Z	-
Other	Z	1	-	-	-	1
Subtotal	100%	332	26	65	163	77
Combined						
Natural Gas ^a	65%	1,017	103	293	316	305
Electricity	32%	509	8	38	411	52
Oil	2%	38	35	1	2	S
Other	1%	9	S	S	1	6
Total	100%	1,574	146	334	730	363
Heat Pump^b						
Single-Family	23%	289	8	15	244	21
Multi-Family	31%	103	5	7	75	16
Combined	25%	392	13	22	319	37
Manufactured Homes^c						
		273	14	46	178	35

^aIncludes liquefied petroleum gas

^bSubset of electricity. Share information reflects total market

^cNot included in the totals for Single-Family, Multi-Family, or Combined. Heating fuel information not available for manufactured homes. Source: Census Bureau Website

S = Did not meet publication standards on the basis of response rate, associated standard error or consistency review.

Z = Less than 500 units

NOTE: Components may not add to totals due to rounding and withheld data (see note S).

Source: U.S. Bureau of the Census, *Characteristics of New Housing: 2000*.

TABLE 2

**A COMPARISON OF 1999 & 2000 PRIVATE HOUSING COMPLETIONS
(Percent of Market)**

	TOTAL U.S.		NORTHEAST		MIDWEST		SOUTH		WEST	
	1999	2000	1999	2000	1999	2000	1999	2000	1999	2000
Single-Family										
*Gas	70%	70%	65%	65%	90%	92%	50%	50%	90%	91%
Electricity	27%	27%	7%	6%	9%	7%	50%	50%	8%	8%
Oil	3%	3%	28%	28%	S	S	S	S	S	S
Other	1%	1%	S	S	1%	1%	S	S	2%	2%
Multi-Family										
*Gas	43%	45%	84%	94%	74%	69%	18%	21%	56%	59%
Electricity	55%	54%	4%	3%	26%	31%	82%	79%	42%	39%
Oil	1%	S	13%	4%	-	S	S	S	S	-
Other	S	S	S	-	-	-	S	-	2%	2%
Combined										
*Gas	64%	65%	69%	71%	87%	88%	43%	43%	83%	84%
Electricity	33%	32%	6%	5%	12%	11%	57%	56%	15%	14%
Oil	2%	2%	25%	24%	S	1%	S	1%	S	-
Other	1%	1%	-	-	S	-	S	S	2%	2%

*Includes liquefied petroleum gas

S = Did not meet publication standards on the basis of response rate, associated standard error or consistency review.

Source: U.S. Bureau of the Census, *Characteristics of New Housing: 1998 & 1999*.

Figure 2
Market Share for All Housing Completions
1990-2000

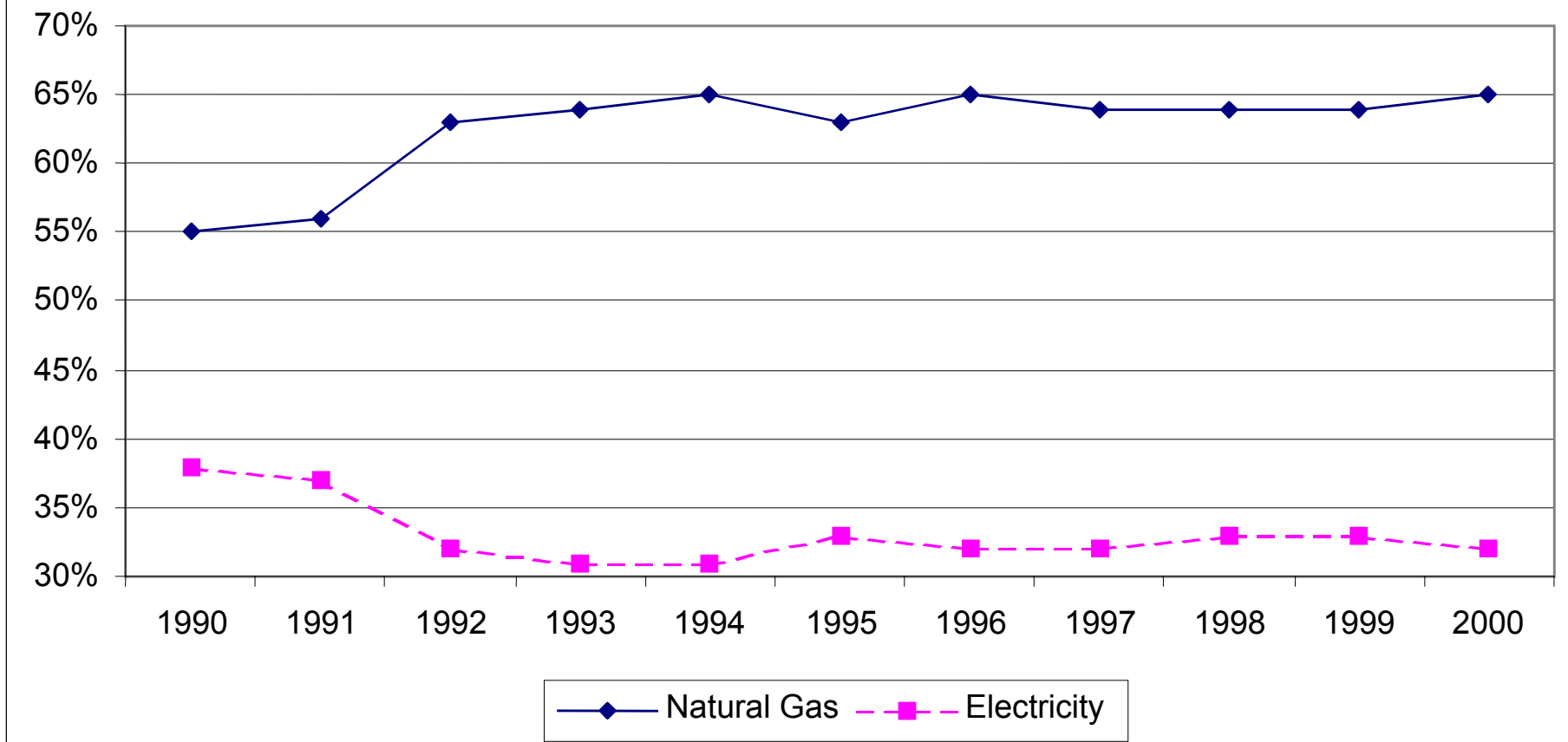


TABLE 3

MARKET SHARE OF PRIVATE HOUSING COMPLETIONS BY HEATING FUEL

1990 - 2000

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Single-Family											
Natural Gas ^a	59%	60%	65%	66%	67%	67%	69%	69%	70%	70%	70%
Electricity	33%	32%	29%	29%	29%	28%	26%	26%	26%	27%	27%
Oil	5%	4%	4%	3%	3%	3%	3%	3%	3%	3%	3%
Other	3%	4%	2%	2%	1%	1%	1%	1%	1%	1%	1%
Multi-Family											
Natural Gas ^a	44%	41%	52%	52%	52%	47%	48%	45%	44%	43%	45%
Electricity	53%	55%	44%	45%	46%	51%	52%	54%	55%	55%	54%
Oil	1%	1%	1%	0%	0%	1%	S	S	1%	1%	S
Other	2%	4%	3%	3%	2%	1%	S	S	1%	S	S
Combined											
Natural Gas ^a	55%	56%	63%	64%	65%	63%	65%	64%	64%	64%	65%
Electricity	38%	37%	32%	31%	31%	33%	32%	32%	33%	33%	32%
Oil	4%	4%	3%	3%	3%	3%	2%	3%	3%	2%	2%
Other	3%	3%	2%	2%	1%	1%	1%	1%	1%	1%	1%

^a Includes liquefied petroleum gasSource: U.S. Bureau of the Census, *Characteristics of New Housing: Various Years*.

S = did not meet publication standards on the basis of response rate, associated standard error or consistency review.

Existing Housing

According to the U.S. Department of Census, half of the existing housing units in 2000 used natural gas to heat their homes, accounting for 53 million of the total 104 million housing units in the U.S. (see Table 4).

Natural gas holds the largest market share in the Midwest, where 69 percent of the homes in that region have natural gas heating systems. Natural gas has the lowest market share in the warmer climate of the South. About 35 percent of the houses in the South used natural gas space heating in 2000.

Natural gas heating also beats out the competition in the Northeast and West regions of the country. Natural gas house heating market share in the Northeast was 47 percent, while the natural gas share was 59 percent in the West.

TABLE 4
Household Space Heating Market Share, 2000

	Natural <u>Gas</u>	LP <u>Gas</u>	<u>Electricity</u>	Fuel <u>Oil</u>
UNITED STATES	50%	6%	31%	9%
NORTHEAST	47%	3%	11%	35%
NEW ENGLAND	33%	4%	12%	49%
Connecticut	30%	2%	15%	51%
Maine	3%	5%	5%	80%
Massachusetts	43%	3%	13%	39%
New Hampshire	18%	11%	8%	58%
Rhode Island	46%	2%	8%	41%
Vermont	13%	14%	6%	57%
MIDDLE ATLANTIC	53%	3%	11%	30%
New Jersey	66%	3%	11%	20%
New York	47%	3%	8%	39%
Pennsylvania	53%	3%	16%	24%
MIDWEST	69%	9%	16%	4%
EAST NORTH CENTRAL	72%	8%	15%	4%
Illinois	81%	5%	13%	1%
Indiana	62%	9%	24%	3%
Michigan	77%	9%	7%	4%
Ohio	68%	6%	19%	5%
Wisconsin	64%	12%	12%	8%
WEST NORTH CENTRAL	64%	12%	18%	3%
Iowa	65%	15%	15%	2%
Kansas	72%	9%	17%	0%
Minnesota	67%	11%	11%	7%
Missouri	58%	13%	24%	0%
Nebraska	70%	9%	19%	1%
North Dakota	44%	17%	28%	8%
South Dakota	54%	16%	20%	7%
SOUTH	35%	8%	52%	4%
SOUTH ATLANTIC	26%	7%	57%	7%
Delaware	36%	9%	28%	26%
District of Columbia	66%	2%	26%	7%
Florida	5%	4%	89%	1%
Georgia	48%	13%	36%	1%
Maryland	45%	2%	34%	16%
North Carolina	22%	14%	49%	13%
South Carolina	25%	8%	62%	4%
Virginia	34%	5%	44%	13%
West Virginia	46%	6%	32%	7%
EAST SOUTH CENTRAL	38%	11%	47%	1%
Alabama	39%	13%	46%	0%
Kentucky	42%	10%	41%	3%
Mississippi	39%	19%	40%	0%
Tennessee	35%	7%	54%	2%
WEST SOUTH CENTRAL	47%	6%	45%	0%
Arkansas	50%	11%	35%	0%
Louisiana	47%	5%	46%	0%
Oklahoma	62%	8%	27%	0%
Texas	44%	6%	50%	0%
WEST	59%	4%	30%	2%
MOUNTAIN	58%	6%	32%	1%
Arizona	35%	4%	59%	0%
Colorado	75%	4%	18%	0%
Idaho	44%	7%	33%	6%
Montana	56%	13%	17%	5%
Nevada	55%	5%	37%	2%
New Mexico	66%	11%	15%	0%
Utah	84%	2%	11%	0%
Wyoming	61%	9%	22%	1%

SOURCE: U.S. Department of Census, www.census.gov

III. RESIDENTIAL NATURAL GAS CUSTOMERS IN 2000

Total Residential Customers

Based on the Energy Information Administration's Form 176 database, the total number of residential natural gas customers reached 59 million in 2000. This represents a 1.6 percent increase over 1999.

House Heating Customers

Based on survey responses, Census information, and AGA's Gas Facts: 2000 data, approximately 83 percent of all residential natural gas customers used gas to heat their homes (see Table 5). The Midwest region of the country had the highest penetration, in excess of 92 percent, while the Northeast region had the lowest penetration, around 74 percent. (Please note that this estimate of total number of customers that heat with natural gas is slightly lower than the Census estimate in Table 4. The number in Table 5 counts customers, some of which have multiple homes under one account, such as apartment buildings. The Census number is an estimate of all homes.)

Natural Gas Customer and Unit Additions

The number of natural gas customers increased 971,000 in 2000. The Mountain region had the highest percentage increase in customers, with the South Atlantic and the Pacific regions registering very small increases.

Most of the additions were estimated to be from new construction. Of the total additions reported by the survey respondents, 12 percent were from conversions of customers from another fuel. Other factors that should be considered include reductions in the number of customers (demolition, conversion to another fuel, etc.) and reclassification of customers from master-metered apartments to individual meters.

House Heating Conversions

In 2000, companies responding to the survey reported that 31,507 new customers came from homes converted from another fuel to natural gas. The respondents were asked to provide a breakdown of conversions by fuel type. Based on these data, fuel oil conversions to natural gas accounted for 22 percent of all conversions. Approximately 35 percent of conversion customers had previously heated with electricity. The respondents were unable to identify the previous heating fuel for 43 percent of the homes.

Table 5
2000 GAS CUSTOMERS AND UNIT ADDITIONS

Region, Division and State	GAS CUSTOMERS			GAS UNIT ADDITIONS		
	Total ¹	House Heating ²	Percent Heating ²	Total ¹	Reported Conversions ³	Reported Conversions as a % of Total Reported Additions ³
UNITED STATES	59,193,828	49,130,877	83.0%	970,599	31,507	11.6%
NORTHEAST						
NEW ENGLAND	2,080,099	1,416,872	68.1%			
Connecticut	458,388	330,039	72.0%	15,931	N/A	N/A
Maine	17,111	11,233	65.6%	1,864	N/A	N/A
Massachusetts	1,278,781	805,632	63.0%	45,894	N/A	N/A
New Hampshire	82,813	74,540	90.0%	1,855	N/A	N/A
Rhode Island	214,474	175,170	81.7%	3,377	N/A	N/A
Vermont	28,532	20,258	71.0%	601	N/A	N/A
MIDDLE ATLANTIC	9,046,031	6,730,208	74.4%			
New Jersey	2,364,058	2,033,090	86.0%	118,154	2,128	26.8%
New York	4,162,450	2,580,719	62.0%	11,719	8,028	58.9%
Pennsylvania	2,519,523	2,116,399	84.0%	32,819	2,366	25.4%
MIDWEST						
EAST NORTH CENTRAL	12,832,140	11,341,380	88.4%			
Illinois	3,631,762	3,050,680	84.0%	37,691	65	1.0%
Indiana	1,590,925	1,511,379	95.0%	20,672	410	12.7%
Michigan	2,979,832	2,771,244	93.0%	30,204	1,736	N/A
Ohio	3,171,620	2,695,877	85.0%	60,512	1,963	16.6%
Wisconsin	1,458,001	1,312,201	90.0%	31,092	159	20.1%
WEST NORTH CENTRAL	4,923,367	4,420,951	89.8%			
Iowa	811,906	755,073	93.0%	12,891	143	N/A
Kansas	833,597	658,542	79.0%	8,794	3	N/A
Minnesota	1,218,086	1,120,639	92.0%	27,896	933	N/A
Missouri	1,346,325	1,211,693	90.0%	34,460	360	6.1%
Nebraska	465,718	447,089	96.0%	5,545	129	1.7%
North Dakota	105,660	97,207	92.0%	1,609	N/A	N/A
South Dakota	142,075	130,709	92.0%	5,286	N/A	N/A
SOUTH						
SOUTH ATLANTIC	6,058,214	4,855,501	80.1%			
Delaware	111,845	102,338	91.5%	(4,116)	N/A	N/A
District of Columbia	138,252	117,514	85.0%	1,046	96	27.8%
Florida	571,972	102,955	18.0%	15,344	N/A	N/A
Georgia	1,679,152	1,393,696	83.0%	(53,713)	N/A	N/A
Maryland	941,384	847,246	90.0%	2,355	501	7.0%
North Carolina	857,943	789,308	92.0%	42,035	N/A	N/A
South Carolina	489,340	371,898	76.0%	15,541	N/A	N/A
Virginia	907,855	798,912	88.0%	13,968	1,429	12.3%
West Virginia	360,471	331,633	92.0%	(1,821)	N/A	N/A
EAST SOUTH CENTRAL	2,920,104	2,496,174	85.5%			
Alabama	786,308	636,909	81.0%	10,997	N/A	N/A
Kentucky	744,821	729,925	98.0%	9,450	476	36.2%
Mississippi	427,409	312,009	73.0%	1,057	516	6.6%
Tennessee	961,566	817,331	85.0%	23,670	1644	76.0%
WEST SOUTH CENTRAL	6,106,617	4,898,194	80.2%			
Arkansas	560,055	548,854	98.0%	5,934	N/A	N/A
Louisiana	964,133	761,665	79.0%	2,208	N/A	N/A
Oklahoma	887,371	816,381	92.0%	19,449	N/A	N/A
Texas	3,695,058	2,771,294	75.0%	81,194	24	0.1%
WEST						
MOUNTAIN	4,397,190	3,706,065	84.3%			
Arizona	846,016	609,132	72.0%	43,547	2527	3.6%
Colorado	1,315,619	1,170,901	89.0%	50,587	162	N/A
Idaho	240,399	199,531	83.0%	12,592	N/A	N/A
Montana	224,644	186,455	83.0%	2,530	N/A	N/A
Nevada	520,233	431,793	83.0%	30,204	N/A	N/A
New Mexico	479,894	398,312	83.0%	6,519	N/A	N/A
Utah	641,111	602,644	94.0%	31,508	2,800	14.1%
Wyoming	129,274	107,297	83.0%	1,524	102	N/A
PACIFIC	10,830,068	8,733,553	80.6%			
Alaska	91,249	75,737	83.0%	2,325	N/A	N/A
California	9,370,797	7,590,346	81.0%	39,591	N/A	N/A
Hawaii	30,751	0	0.0%	43	N/A	N/A
Oregon	523,952	408,683	78.0%	21,952	814	32.4%
Washington	813,319	658,788	81.0%	34,215	1,993	41.2%

NA = Insufficient data available due to lack of survey response.

¹ = Derived from Energy Information Administration Form 176 Database (see Appendix 3)

² = Derived from survey responses, Gas Facts 2000 data, and Census information

³ = Based on survey responses only, does not reflect entire population

IV. NATURAL GAS APPLIANCE MARKET SHARE AND CONSUMPTION

Market Share of Natural Gas Appliances in Residences

The Department of Commerce's Bureau of the Census reports the number of residences in the United States by region, along with type of fuels in various applications. This report, American Housing Survey, is released every two years and reflects the number of existing households at a particular time. Therefore, the data does not represent the beginning or end of a year.

TABLE 6

MARKET SHARE OF GAS SPACE HEATING FROM 1987 – 1999

	1999	1997	1995	1993	1991	1989	1987
NORTHEAST	45%	45%	43%	43%	42%	40%	40%
MIDWEST	70%	70%	70%	70%	70%	71%	70%
SOUTH	35%	36%	35%	36%	36%	37%	38%
WEST	63%	62%	62%	61%	60%	61%	62%
TOTAL US	51%	51%	51%	51%	50%	51%	51%

According to the U.S. Department of Commerce's Census Bureau, the market share of natural gas in the residential space heating sector has remained constant at 51 percent over the last twelve years. The largest gain in market share for natural gas furnaces was in the Northeast region, where gas grew by three percentage points. The largest loss in market share was in the South, where gas dropped three percentage points.

TABLE 7

MARKET SHARE OF GAS COOKING FROM 1987 – 1999

	1999	1997	1995	1993	1991	1989	1987
NORTHEAST	48%	48%	49%	48%	48%	49%	50%
MIDWEST	39%	39%	39%	40%	40%	41%	40%
SOUTH	22%	23%	23%	24%	24%	25%	26%
WEST	41%	41%	41%	40%	40%	39%	39%
TOTAL US	35%	36%	36%	36%	36%	37%	37%

Despite the fact that the West region increased its market share two percentage points for gas cooking, the overall market share for gas cooking has decreased from 37 percent in 1987 to 35 percent in 1999. The largest losses were in the South region, where gas fell by four percentage points. The Northeast and Midwest regions followed the South in market share losses by dropping one and two percentage points, respectively.