

INDUSTRY…AT A GLANCE

October 2026

DRILLING ACTIVITY IN PA

Pennsylvania: A World-Class Player in Shale Gas Production



#2

Largest Natural Gas Producer in U.S.

~12,400

Producing Wells

7.7 Tcf

Produced in 2025

18%

Of Total U.S. Natural Gas Production

36 of 67

Counties with Producing Wells

Drilling Activity in PA

13,758 **unconventional wells***

including 12,434 producing natural gas

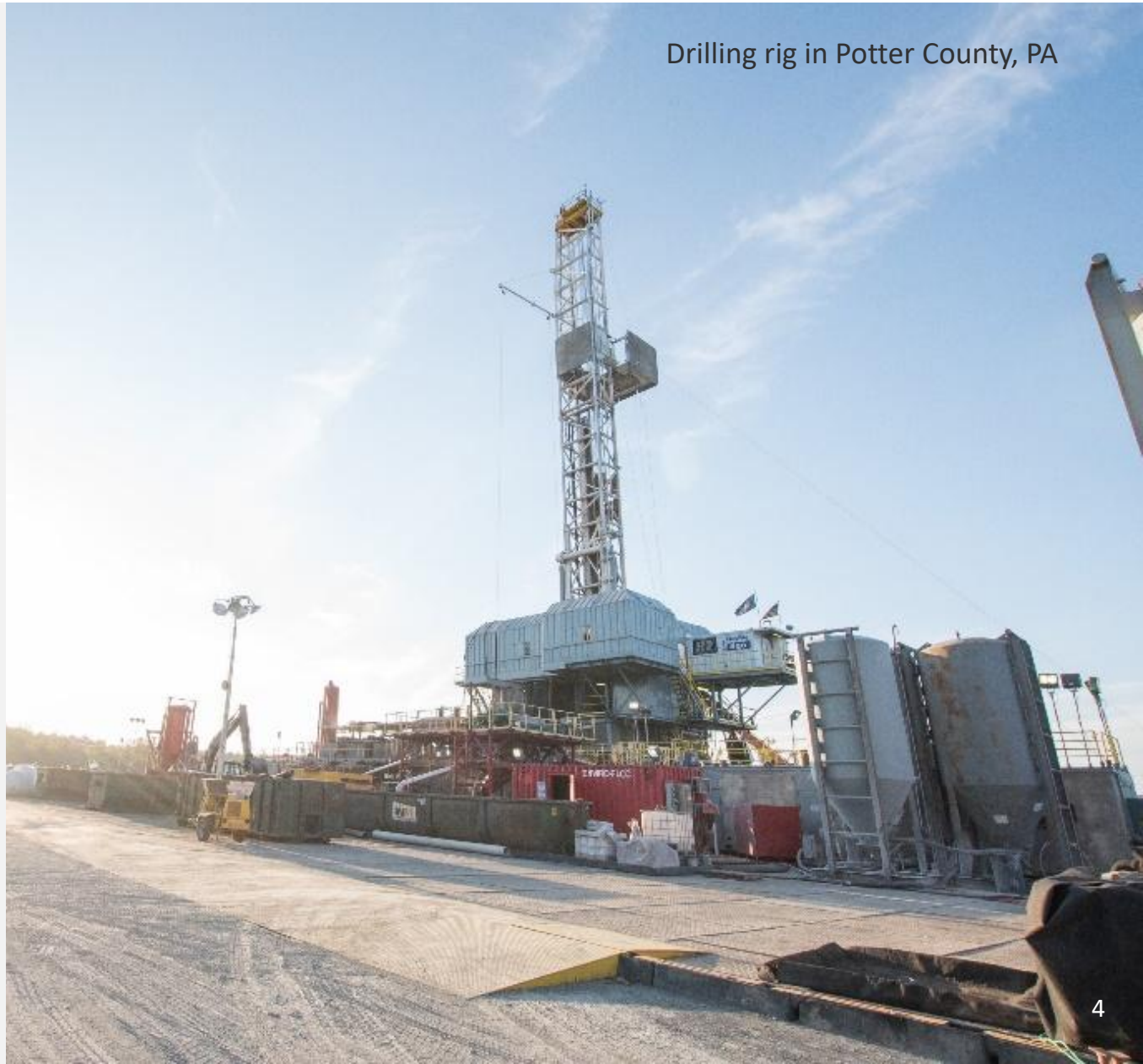
3,985 **unconventional well pads**

~21.3 Bcf **per day**

7.7+ trillion cubic feet per year

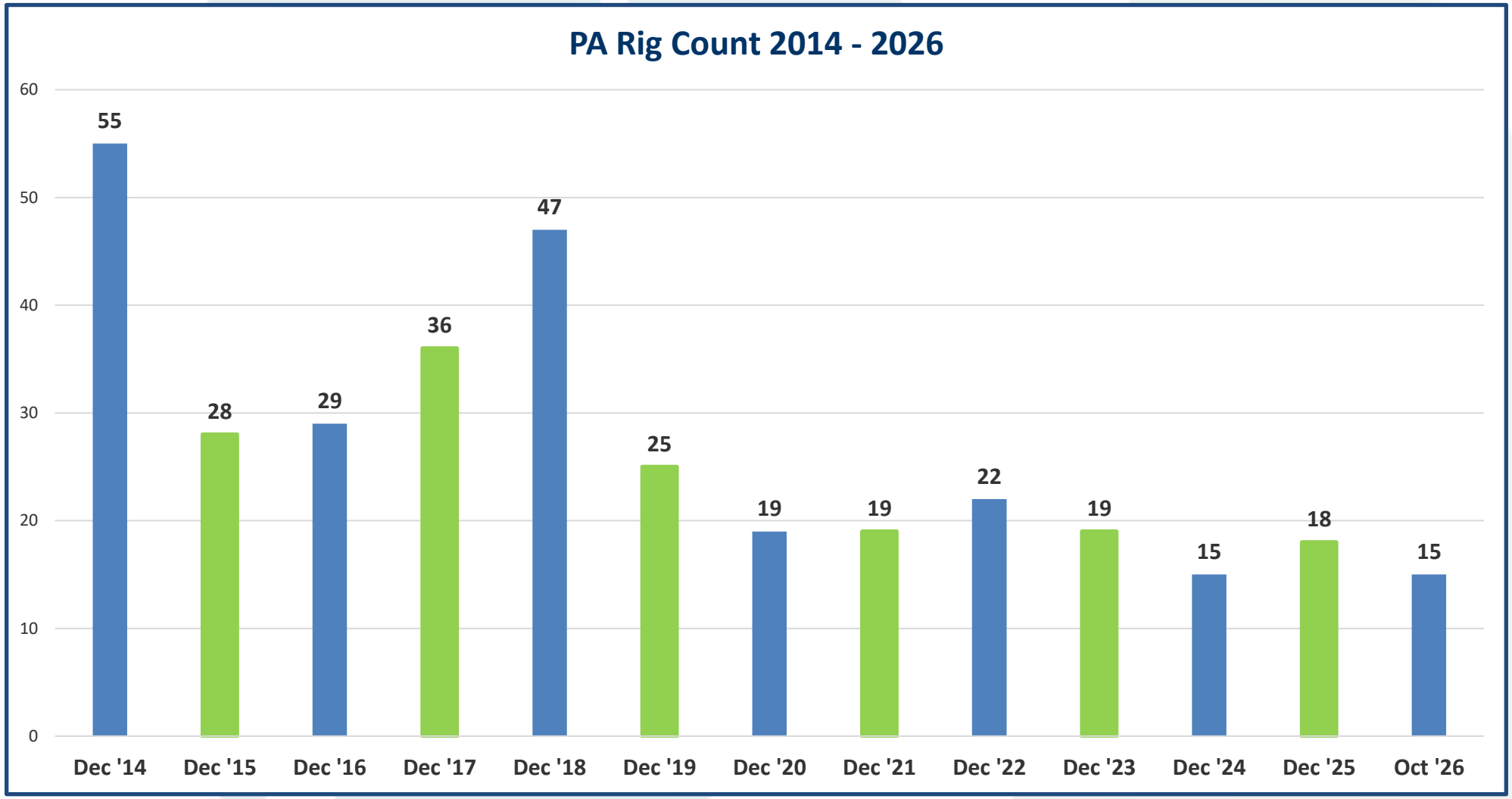
32% **of total U.S. shale gas production**

* August 2026 (most recent data available)



Drilling rig in Potter County, PA

Drilling Activity in PA



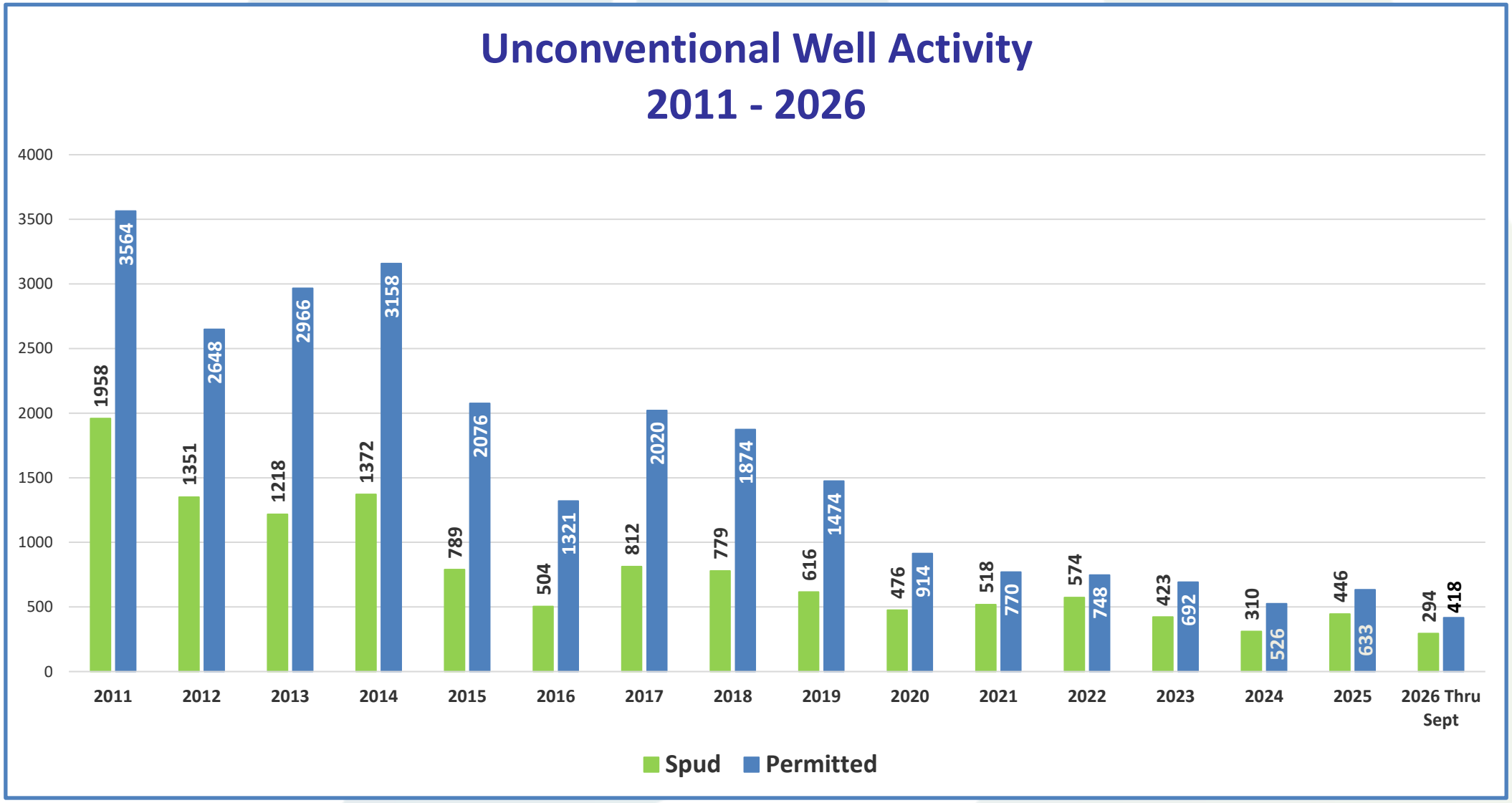
Drilling Activity in PA

Keep in Mind…

- Rig count not the same metric as 8-10 years ago:
  - Longer laterals
  - More efficient drilling
  - More frac stage completions

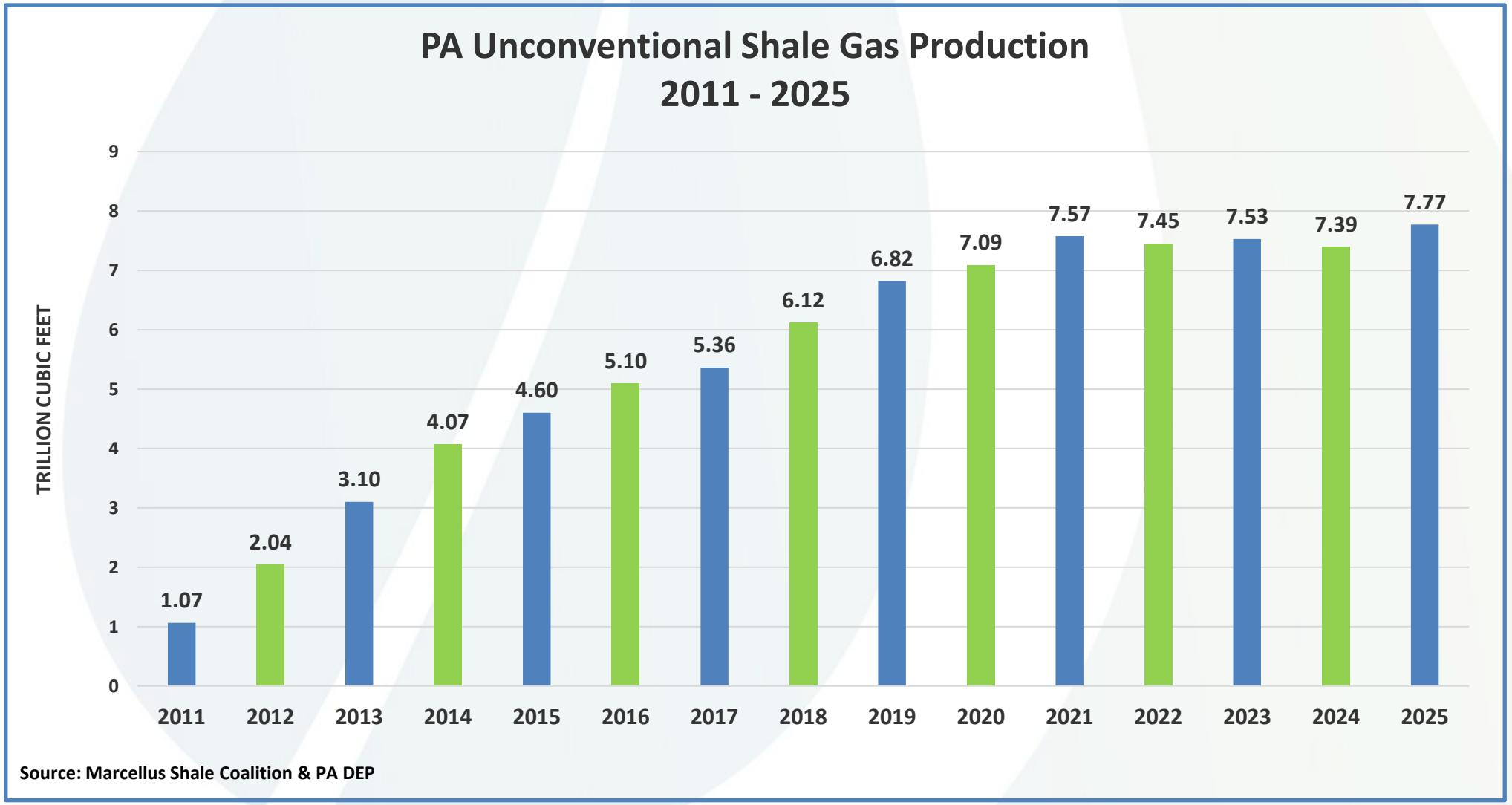
- But still *an* indicator:
  - Oil v Gas
  - Wet v Dry
  - Basin v Basin

Drilling Activity in PA



NATURAL GAS PRODUCTION

Fueling the Nation



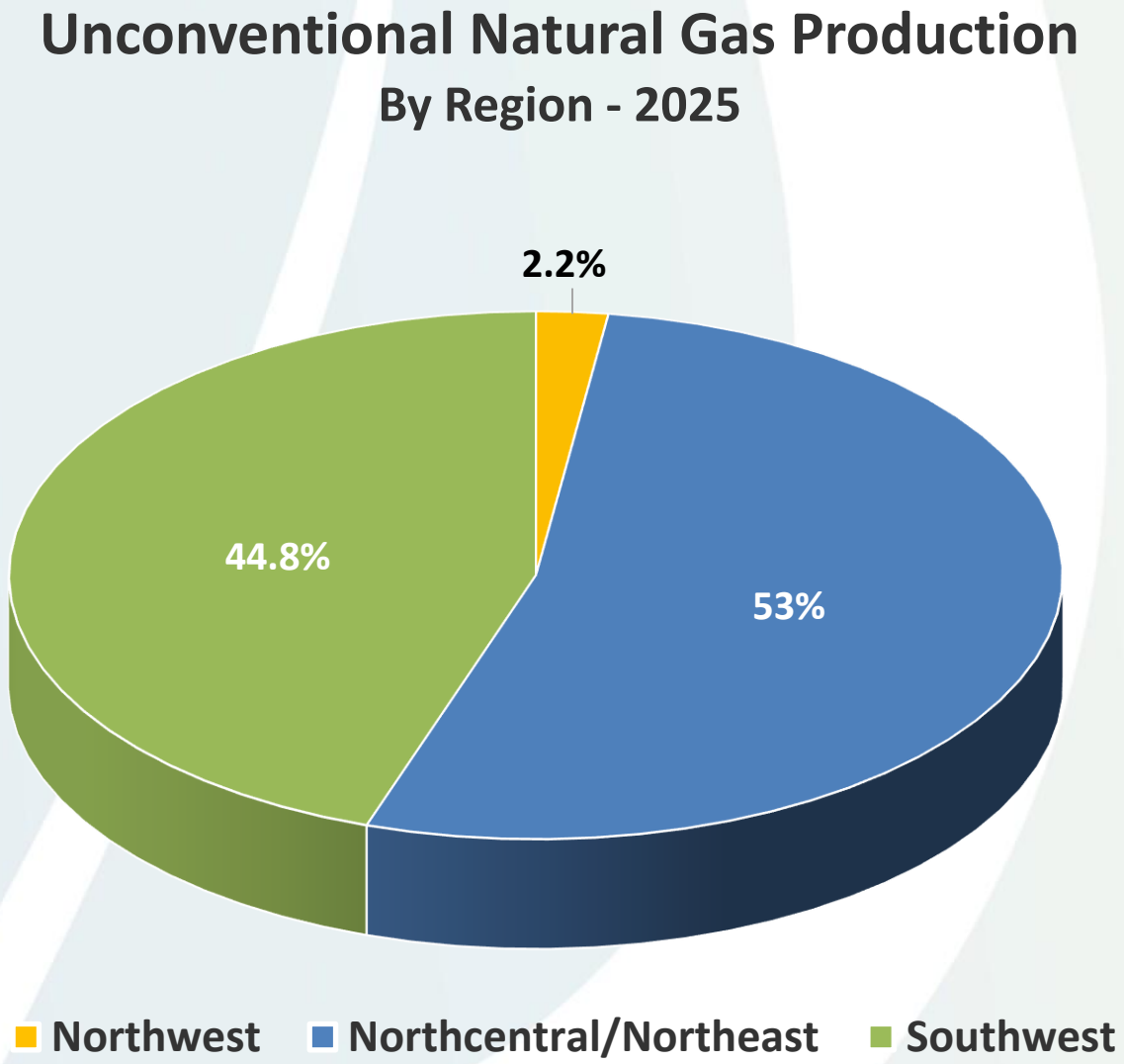
By The Numbers

MARCELLUS SHALE COALITION®

Top Ten Producing Counties by Volume (2025)

County	Production (MCF)	% of PA Production	# of Producing Wells
Susquehanna	1,373,443,742	17.7%	1,945
Bradford	1,173,085,439	15.1%	1,520
Washington	1,154,437,325	14.9%	1,981
Greene	1,140,925,300	14.7%	1.479
Lycoming	594,737,702	7.7%	1,018
Tioga	491,547,854	6.3%	868
Westmoreland	403,505,399	5.2%	369
Butler	257,178,573	3.3%	633
Wyoming	214,320,048	2.8%	297
Armstrong	177,075,844	2.3%	332

By The Numbers



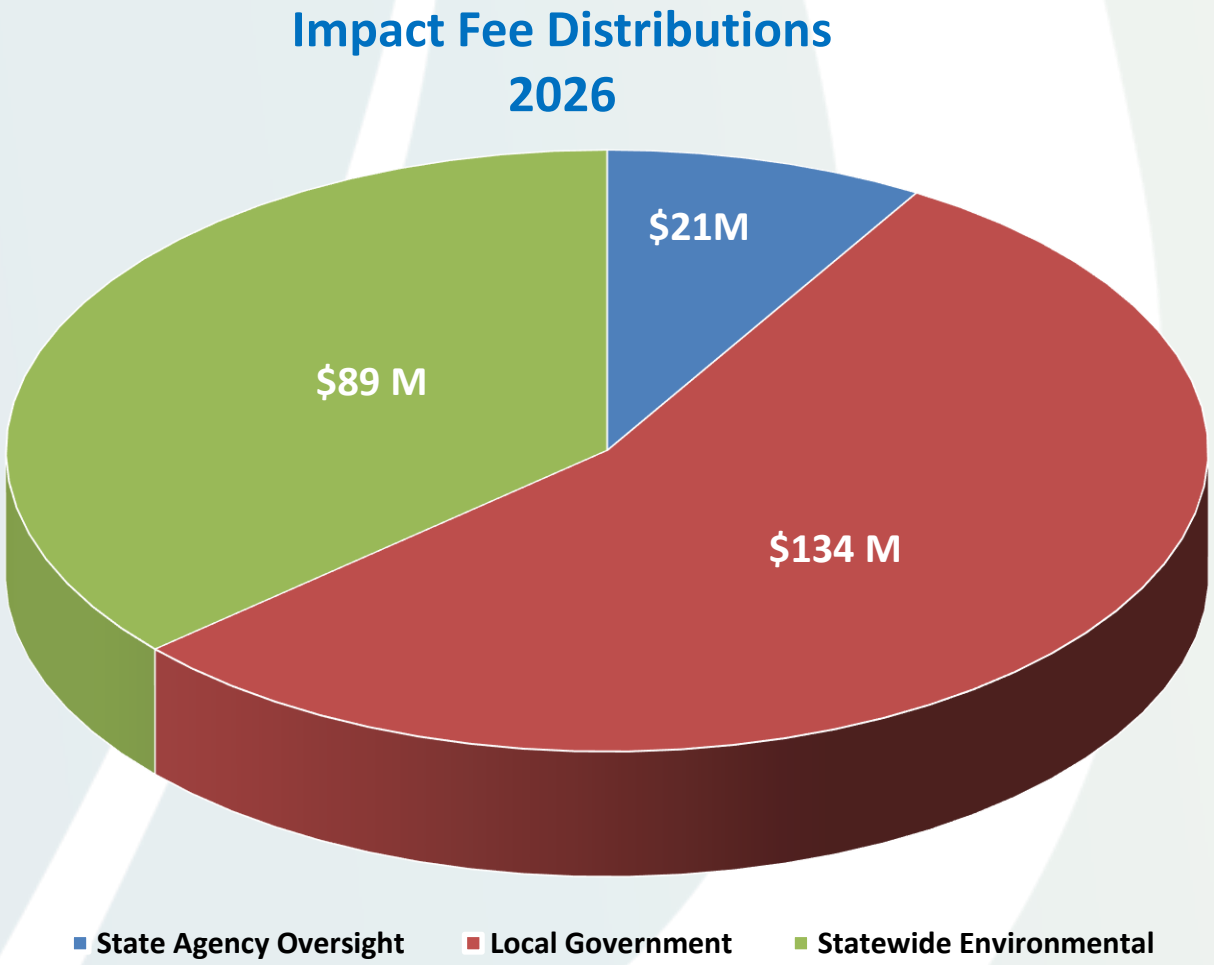
PA’S SEVERANCE TAX:

THE IMPACT FEE

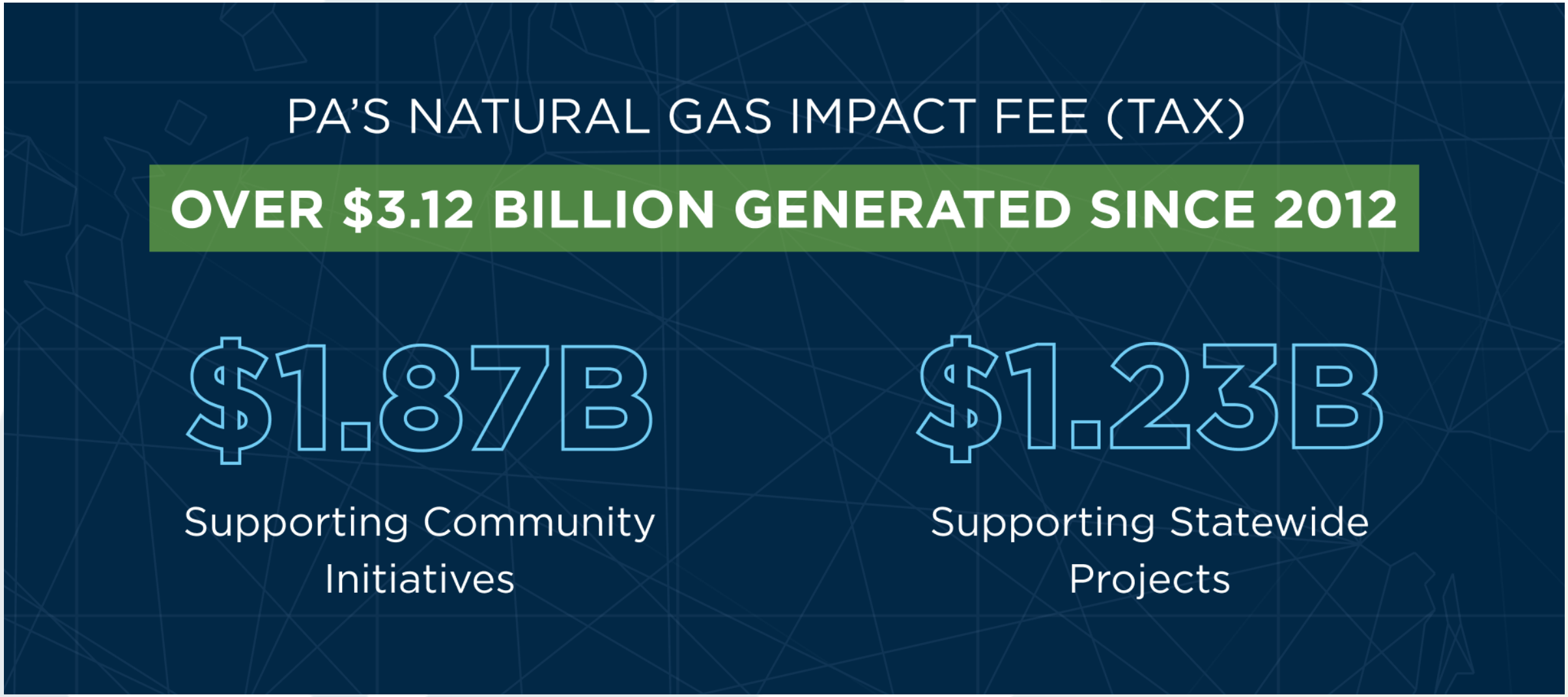
Impact Fee Revenues to Date

Year Distributed	Amount
2012	$204.2 M
2013	$202.5 M
2014	$225.8 M
2015	$223.5 M
2016	$187.7 M
2017	$173.3 M
2018	$209.6 M
2019	$251.8 M
2020	$200.3 M
2021	$146.3 M
2022	$233.8 M
2023	$278.8 M
2024	$179.6 M
2025	$164.6 M
2026	$240 M
TOTAL:	**$3.12 Billion**

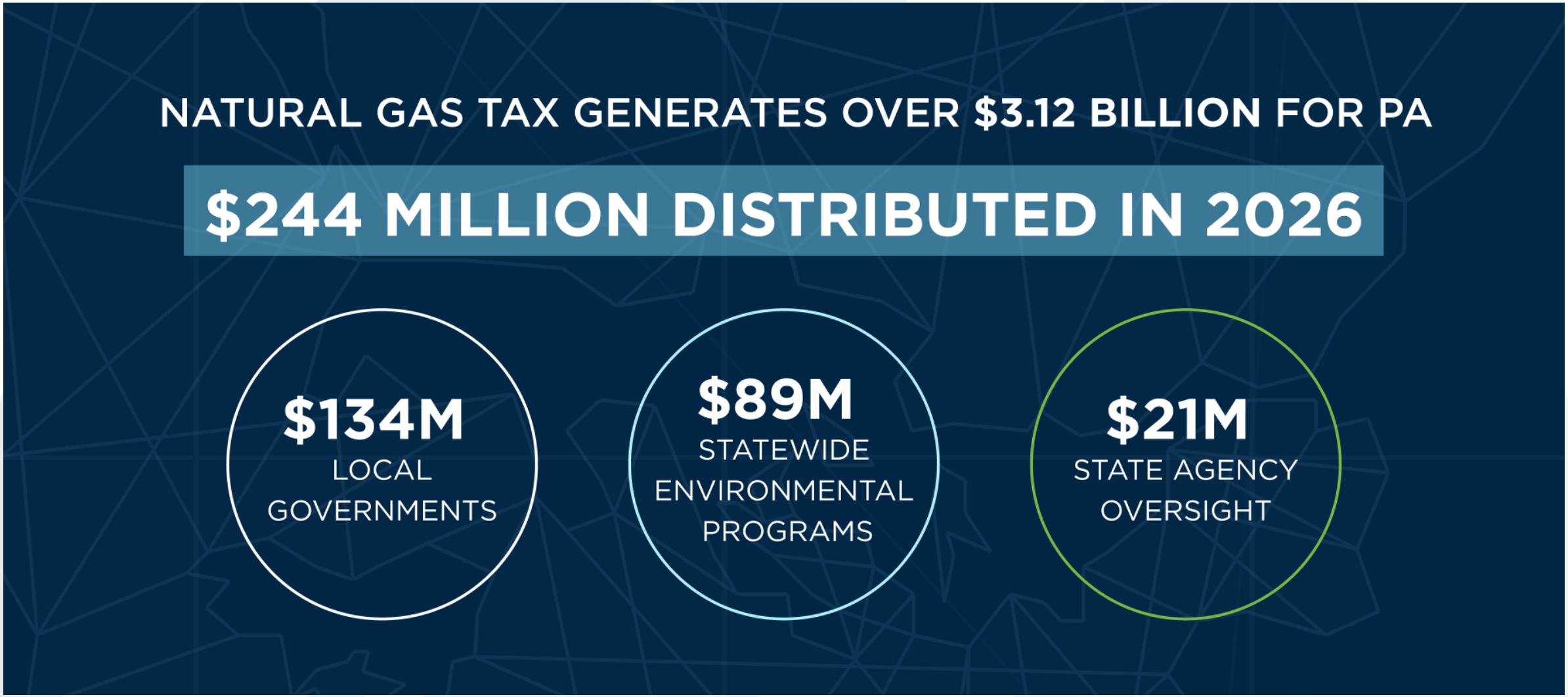
Benefiting PA Communities



Benefitting Communities



Benefitting Communities



ENERGY AFFORDABILITY

Lower Prices = Customer Savings
2008 vs 2025

Natural Gas Utility	PGC Rate / MCF		% Change
	2008*	2025*	2008-2025
PECO	$13.16	$6.64	-50%
NFG	$10.86	$4.77	-56%
PGW	$13.02	$5.49	-58%
Columbia	$15.94	$7.01	-56%
UGI	$13.26	$6.61	-50%
Peoples/Equitable	$15.89	$4.09	-74%

* PUC Purchased Gas Cost (PGC) Rate in Effect Prior to Annual Review

Natural Gas-Driven Consumer Savings

PA consumers realized **$8.83 Billion** in savings last year compared to 2008 prices

Columbia

- Residential: **$616**
- Commercial: **$2,661**
- Industrial: **$33,541**

NFG

- Residential: **$529**
- Commercial: **$1,523**
- Industrial: **$9,275**

PGW

- Residential: **$459**
- Commercial: **$2,523**
- Industrial: **$7,530**

Peoples Gas

- Residential: **$920**
- Commercial: **$3,044**
- Industrial: **$37,170**

UGI

- Residential: **$479**
- Commercial: **$2,095**
- Industrial: **$8,299**

PECO

- Residential: **$443**
- Commercial: **$3,032**
- Industrial: **$20,375**

Source: PA P ed Gas Costs *Based on ave eported in PA PUC Natural Gas Outlook 2024

Benefiting Consumers

MARCELLUS SHALE COALITION®

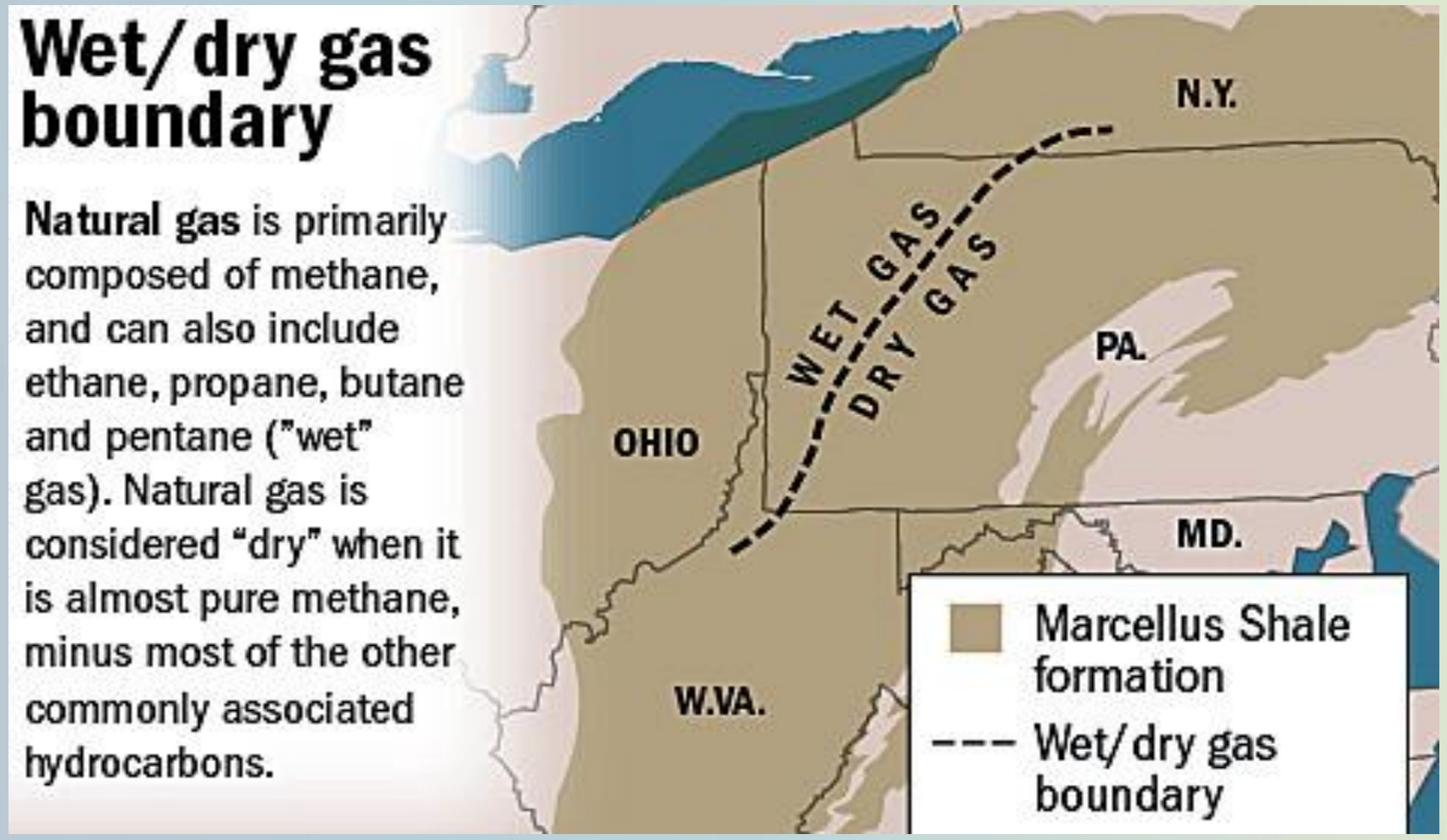
$8,831,090,437

PA Natural Gas Consumer Savings in 2025 compared to 2008 prices

Based on average customer usage for each PA utility as reported in PA PUC Natural Gas Outlook 2024.
Savings adjusted to reflect inflation 2008-2024 (Bureau of Labor Statistics)

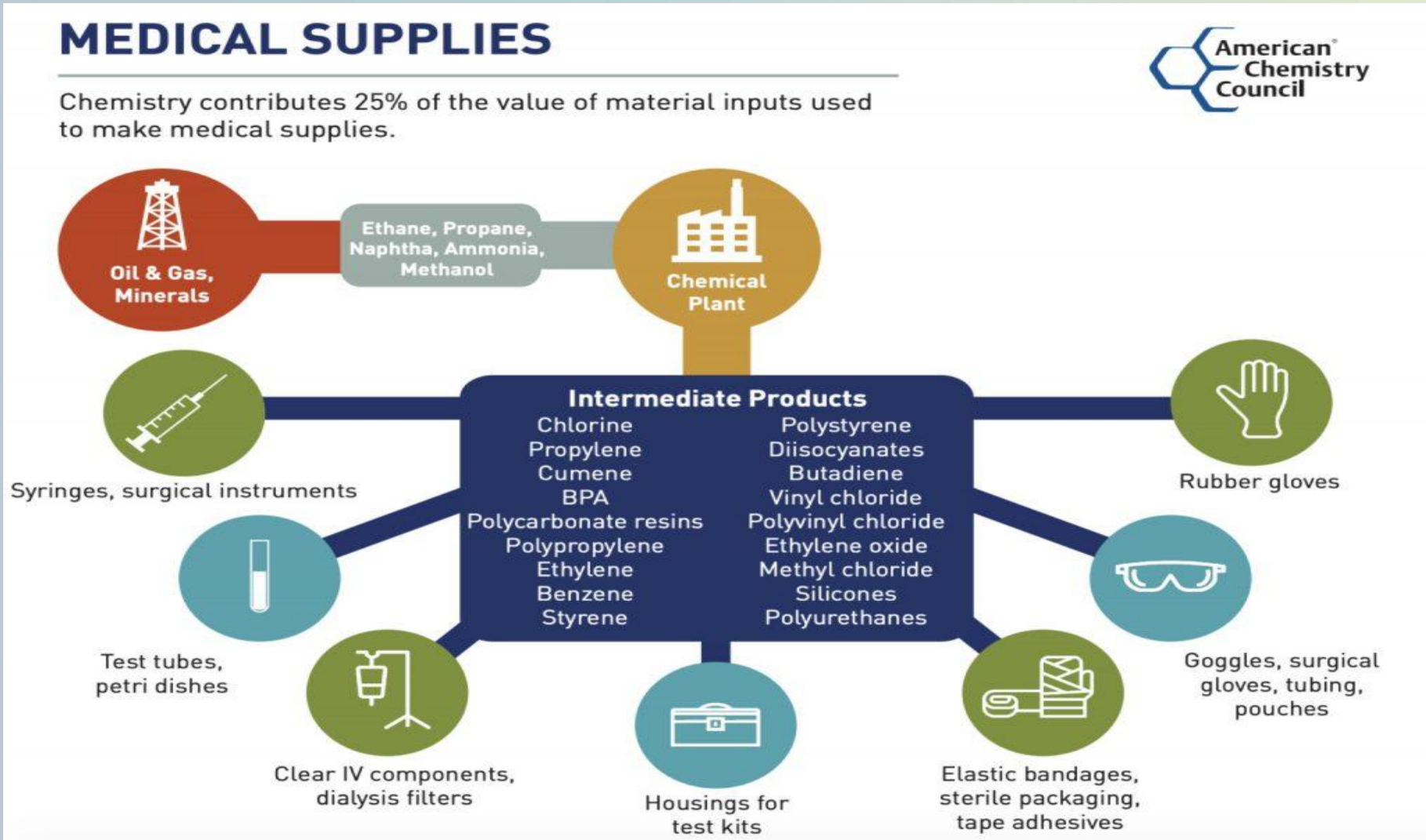
NATURAL GAS LIQUIDS

Shale Gas in PA



Source: Penn State University Extension

Natural Gas Liquids: Feedstock of Our Economy



Fueling Manufacturing

- **$208 Billion Chemical Industry Investment Tied to Shale Gas**
  - $109 Billion (completed projects)
  - $31 Billion (under construction)
  - $68 Billion (planning phase)
- **351 Total Projects**
  - 786,000 total jobs
  - $61.1 Billion payroll
  - $309.5 Billion economic output



Source: American Chemistry Council. Economic contributions tied to higher chemical industry output 2010 – 2030.



"Thanks to this versatile resource, American chemistry has experienced more than a decade of growth. Our new investment boosts employment, payrolls, and tax revenue in local communities and nationwide."

Chris Jahn, President & CEO, ACC

ECONOMIC IMPACTS

Economic Impacts

In 2022, PA's natural gas industry:

123,000
Pennsylvania jobs supported

$41B+
in economic activity generated

$6.3B+
in royalties paid to PA landowners

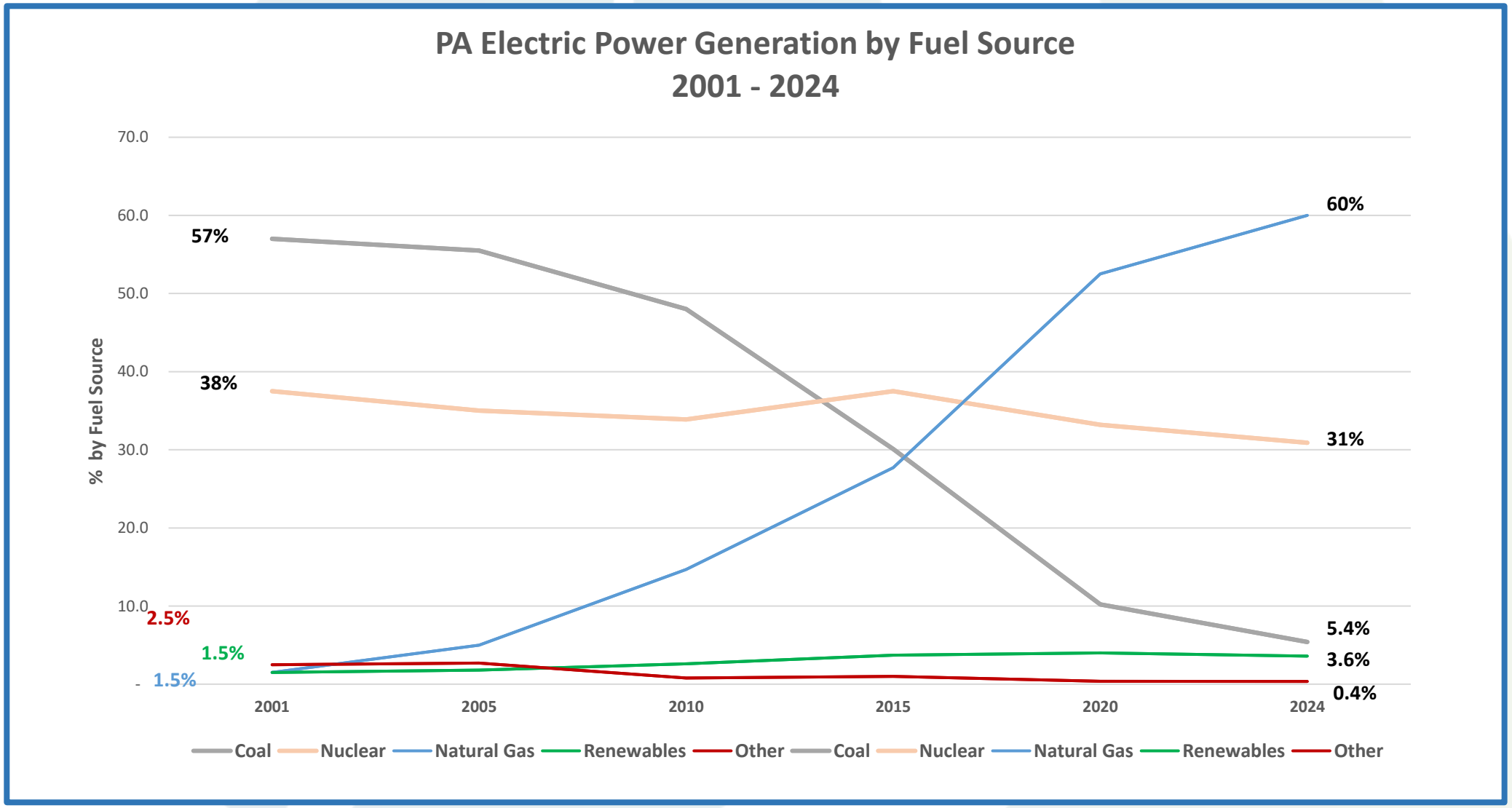
$97,000
avg. worker salary (113% above PA median)

$5.8B+ paid in local, state & federal taxes



ENHANCING AIR QUALITY

PA's Changing Energy Landscape



Source: U.S. Energy Information Administration – Electricity Data Browser

Enhancing Air Quality

Environmental Benefits are Undeniable — Since 2005

↓ 48%

reduction in VOCs

↓ 93%

reduction in NOx

↓ 98%

reduction in SOx

↓ 46%

reduction in CO_2

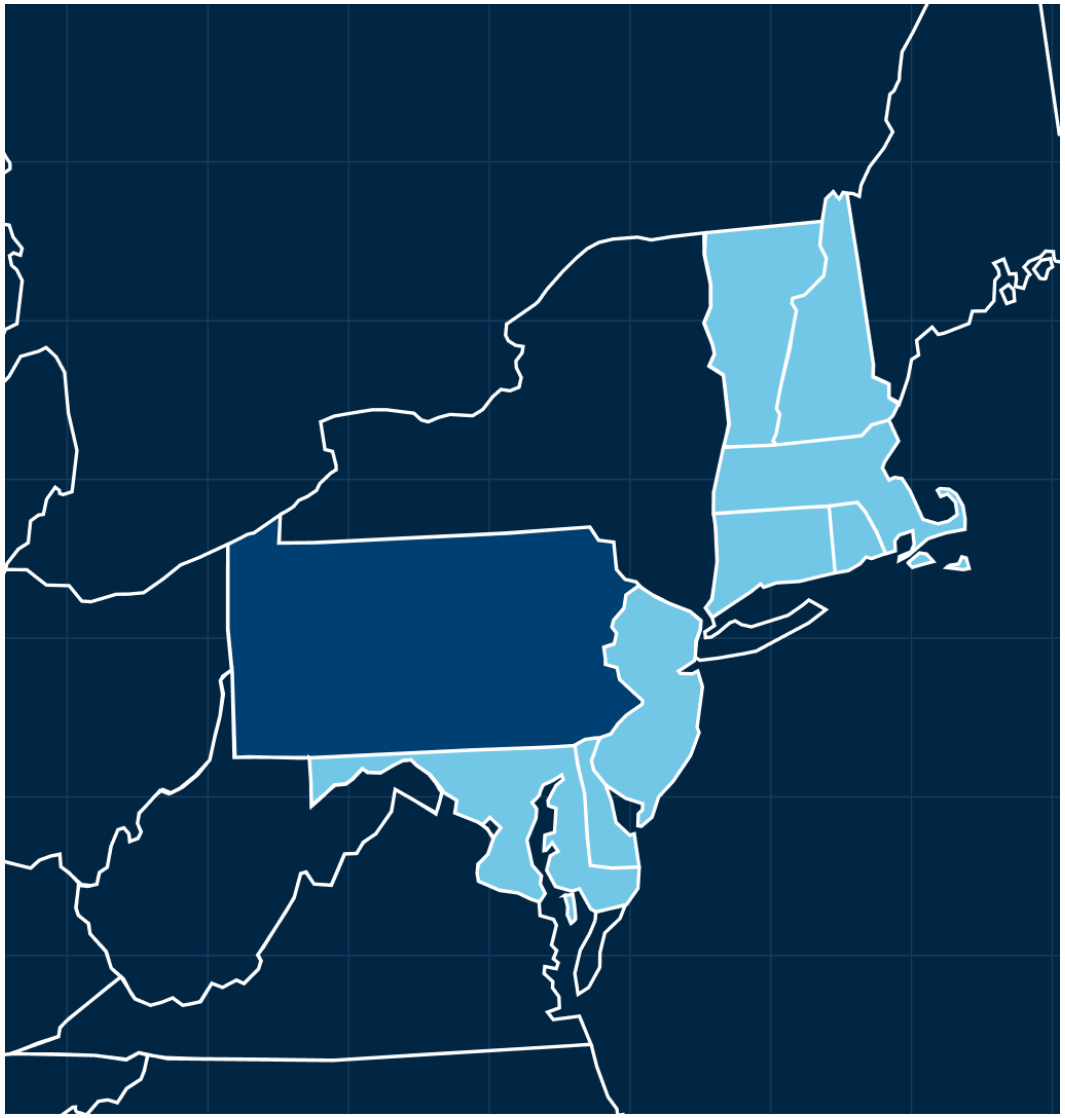
Reductions from PA Electric Power Generation Sector

Enhancing the Environment…Now and in the Future

58M metric tons fewer CO_2 emitted in 2023 vs. 2005, thanks to natural gas electric generation

12.5M cars removed from the road for a year — equivalent impact

Or removing every car in: PA, CT, DE, MA, MD, NH, NJ, RI & VT — ***combined***



Marcellus Shale Coalition Contact

membership@marcelluscoalition.org

Support Pennsylvania Energy

www.unitedshaleadvocates.com