



# ESC

# Industrial & Major Accounts Consortium

## IMAC Consortium Agenda

05/26/26

### Financial Update

- \$2,700 remains in the budget. (more to come soon with new commitments)

### Proposal

- A second round of funding is needed for the consortium to pursue any new future deliverables.
- A new Investment Prospectus was created and distributed to all members of the consortium.
- The Investment Prospectus has many new proposed training units based on feedback from members such as methane pyrolysis.
- We have had several new commitments already, but are still accepting new commitments.

### Industrial & Commercial Industry Discussion

- Industrial success stories
- Challenges selling gas to industrial customers
  - Long lead times are concerning for new engines and products.
  - Potential interest in a white paper on this subject.
- New technologies
- How should industrial customers think about long-term gas procurement when U.S. gas is increasingly tied to global LNG markets?
- Will AI-driven electric demand make natural gas more valuable as a grid reliability fuel, or will it accelerate renewables, storage, and demand response instead?

Consortium members:

