

Connecticut is planning for less gas — while your mains still have to last 50 years.

The three companies that deliver gas to roughly 660,000 Connecticut homes and businesses must keep replacing decades-old main in a state now targeting a 45% emissions cut by 2030 and steering new buildings toward heat pumps. Every replacement mile, integrity upgrade, and reliability asset competes for capital against a throughput curve that may bend down. Invizion helps gas utilities re-sequence a capital portfolio in a click — and defend every decision to PURA.

663,586¹ Natural gas consumers in Connecticut in 2024 — about 597,512 of them residential.	8,100+ mi² Distribution main operated by Connecticut Natural Gas and Southern Connecticut Gas alone.	55%³ Share of New England's electricity generated from natural gas in 2025 — a winter reliability pinch point.	45% by 2030⁴ Connecticut's statutory greenhouse-gas cut below 2001 levels — pressure on long-run gas throughput.
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THE CONNECTICUT LANDSCAPE

Four forces are moving your project list at once

None of these is theoretical, and none waits for the next budget cycle. Together they mean the capital plan approved last year may already be the wrong plan.

SYSTEM INTEGRITY & AGING PIPE

Thousands of miles of main, much of it old

Connecticut Natural Gas operates 3,871 miles of distribution main for 187,790 customers, and Southern Connecticut Gas another 4,242 miles for 208,601 — more than 8,100 miles between the two Avangrid companies alone² Eversource's Yankee Gas adds roughly 256,000 customers across 85 Connecticut towns⁵

Much of that system was laid decades ago, including cast-iron and bare-steel main in the oldest districts of Hartford, New Haven and Bridgeport that must be replaced under PURA-approved integrity programs and PHMSA distribution-integrity rules. Replacement is non-discretionary safety spend — and it competes for the same capital as everything else.

DECARBONIZATION & ELECTRIFICATION

The state is planning for less gas, not more

Connecticut law requires greenhouse-gas cuts of 45% below 2001 levels by 2030 and 65% by 2040, a zero-carbon electricity supply by 2040, and net zero by 2050.⁴ Policy is steering buildings toward heat pumps, putting the roughly 48 Bcf of gas delivered to Connecticut homes in 2024 on a long-run downward path⁶

The reversal is already visible: the 2013 program that subsidized new gas hookups fell far short of its targets, and the state cut those subsidies short in 2022.⁷ Fewer new customers and flat-to-declining throughput mean the same infrastructure cost is spread over a shrinking base — the stranded-asset math that reshapes every long-horizon plan.

SUPPLY, PRICE & RELIABILITY

A gas-dependent region with a winter problem

Natural gas fuels about 55% of New England's electricity, and on the coldest days pipeline gas is committed to heating customers first, forcing the grid onto oil and imported LNG.³ Connecticut households feel the same squeeze: residential gas prices rose to \$18.88 per thousand cubic feet in 2023 before easing to \$16.83 in 2024.⁸

In January 2026 another deep freeze pushed New England back onto oil, reopening the fight over how the region secures winter fuel.⁹ Design-day planning, LNG peaking and storage are not optional line items here — they are the difference between reliable service and a cold-snap failure.

CAPITAL RECOVERY & REGULATION

Rate relief is no longer a formality

In 2024 Connecticut Natural Gas and Southern Connecticut Gas sought their first rate increase in five years; PURA instead proposed cutting their rates.¹⁰ Avangrid's gas utilities appealed the reduction in Superior Court.¹¹

Eversource's Yankee Gas reset distribution rates in a PURA-approved case effective November 2025.⁵ Connecticut has no Massachusetts-style infrastructure surcharge (GSEP) or automatic DSIC for gas, so most capital is recovered through contested base-rate cases — where affordability pressure now collides directly with replacement and integrity spending.

WHO DELIVERS CONNECTICUT'S GAS

Three investor-owned LDCs, one municipal system

Connecticut's gas distribution is almost entirely investor-owned and PURA-regulated, split between two Avangrid companies and Eversource's Yankee Gas. Beyond them, only the City of Norwich runs its own gas system.

Investor-owned gas LDCs

Rates & capital recovery regulated by PURA

Connecticut Natural Gas (CNG)	187,790 customers · 3,871 miles of main · Avangrid (2023) ²
Southern Connecticut Gas (SCG)	208,601 customers · 4,242 miles of main · Avangrid (2023) ²
Eversource Gas of Connecticut (Yankee Gas)	~256,000 customers · 85 towns ⁵

Together the three LDCs serve about 660,000 Connecticut gas customers.¹

Municipal & other gas

Governed locally, not by PURA rates

Norwich Public Utilities (NPU)	Municipal · natural gas, electric, water & wastewater · Norwich, est. 1904 ⁴
No gas cooperatives	Connecticut has no member-owned natural-gas co-ops.
Much of the state: oil & propane	Gas mains reach a minority of Connecticut towns; heating oil and propane still heat much of the state.

Norwich aside, Connecticut has effectively no public-power gas sector — unusual among the states, and it concentrates capital-planning scrutiny on the three PURA-regulated LDCs.

Every capital dollar has to clear PURA

For the investor-owned LDCs, the question is the same on every filing: why this project, why now, why at this cost?

Public Utilities Regulatory Authority (PURA) sets rates and services for Connecticut's electricity, natural gas, water and telecom companies, including CNG, SCG and Yankee Gas¹³

CNG & SCG 2024 rate case: the utilities sought their first increase in five years; PURA proposed rate cuts instead, and Avangrid appealed to Superior Court — a sharp signal that rate relief is contested¹⁰¹

Yankee Gas: Eversource reset its Connecticut gas distribution rates in a PURA-approved case effective November 2025⁵

No standalone infrastructure surcharge: unlike Massachusetts' GSEP, Connecticut recovers gas main replacement and system spending mainly through base-rate cases — putting integrity capital in direct competition with bill affordability¹⁰

Base rates, LNG assets, and a subsidy that's gone

Connecticut gas utilities have little dedicated federal or surcharge funding for distribution. Recovery runs through the rate base — and through decisions PURA has recently made harder.

Rate base: CNG carried about \$592 million and SCG about \$738 million of regulated rate base at year-end 2023 — roughly \$1.3 billion combined, the asset base every capital dollar must earn a return on.²

LNG peaking assets: CNG and SCG together hold about 20.6 Bcf of LNG storage with peak-day delivery near 216,000 Dth — capital-intensive reliability infrastructure that must be maintained regardless of throughput trends²

The hookup subsidy is gone: the ratepayer-funded incentives that financed new gas connections under the 2013 expansion program were cut short in 2022, removing a growth-capital pathway utilities had counted on.⁷

No GSEP/DSIC: without an automatic infrastructure-replacement surcharge, accelerated main replacement is recovered through contested base-rate cases — making the timing and sizing of each filing a capital-planning decision in itself¹⁰

CONNECTICUT'S GAS SECTOR, IN BRIEF

Questions Connecticut gas leaders are asking

Short, sourced answers — the same facts we dig into with utilities looking at their capital programs.

How many natural gas customers does Connecticut have?

About 663,586 gas consumers in 2024, roughly 597,512 of them residential. They are served mainly by three investor-owned LDCs — Connecticut Natural Gas, Southern Connecticut Gas and Eversource's Yankee Gas — plus the municipal Norwich Public Utilities.²⁵¹²

Is Connecticut expanding or shrinking natural gas use?

Shrinking, in policy terms. The 2013 program to expand gas hookups fell far short and its subsidies were cut in 2022, and state law now targets a 45% emissions cut below 2001 levels by 2030 and net zero by 2050, steering buildings toward electric heat pumps.⁴

Why are Connecticut's winter energy costs so high?

New England draws about 55% of its electricity from natural gas but has limited pipeline capacity, so on cold days gas goes to heating first and the grid leans on oil and imported LNG.³ Connecticut generated nearly 44.8 million MWh in 2024 with natural gas as its primary fuel, so gas supply and price drive both heating and power bills.¹⁴ Residential gas prices reached \$18.88 per thousand cubic feet in 2023.⁸

Who regulates gas rates in Connecticut?

The Public Utilities Regulatory Authority (PURA) sets rates for the investor-owned LDCs.¹³ Its 2024 decision proposing cuts to CNG and SCG rates — which Avangrid appealed — shows how contested capital recovery has become.¹⁰¹¹ Norwich Public Utilities, being municipal, sets its own rates.¹²

How does Connecticut recover gas infrastructure investment?

Mostly through base-rate cases. Connecticut has no Massachusetts-style GSEP surcharge or automatic DSIC for gas, so main-replacement and integrity spending is folded into contested general rate cases against the utilities' roughly \$1.3 billion combined CNG/SCG rate base.²¹⁰

How does Invizion help Connecticut gas utilities plan capital?

Invizion is scenario-based capital portfolio optimization for utilities. It lets a Connecticut LDC model how a declining-throughput forecast, a disallowed rate increase, or an accelerated cast-iron replacement mandate reshuffles the entire project list, re-sequence the portfolio automatically against its constraints, and keep a defensible record of every trade-off for PURA.

REFERENCES

Sources

Every figure in this briefing is tied to a primary or authoritative source.

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ABOUT INVIZION

Capital program optimization for utilities

Invizion is a purpose-built capital lifecycle management platform for utilities. It integrates budgeting, CIP, scenario analysis, and funding-source tracking in one system — so utilities can re-sequence a capital portfolio in a click and demonstrate audit-ready, defensible decisions to regulators, boards, and rating agencies.

See how utilities keep capital plans current and defensible with Invizion.

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