



Our Nation's Energy Future
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ONE Future 2026 Marginal Abatement Cost Curve Study

Foreword

On behalf of the ONE Future member companies, I am pleased to release an updated Marginal Abatement Cost Curve ("MACC") Study prepared by ICF International. This study builds upon ICF International's ground-breaking 2016 ONE Future MACC Study, which was our first effort to assess the most cost-effective methane emissions abatement activities by industry segment. The 2016 Study greatly informed the Coalition's initial sector target-setting for 2025.

This 2026 Study evaluates a decade of work by ONE Future members to collaboratively identify, prioritize, and attack sources of emissions across thousands of natural gas facilities in the United States. ONE Future's continuous and collegial review of best practices and abatement strategies features a seven-fold increase in the deployment of technology and practices between 2016 and 2023, and a corresponding drop in Coalition Methane Intensity from 0.552 in 2017 to 0.280 in 2024, despite adding source categories to its protocol over time.

ONE Future commissioned this Study as part of a two-year strategic planning process to help chart our next ten years, a process that involved hundreds of hours of member company representatives' time and talent. ICF International's analysis included a review of nearly a decade of data collected from member companies, and represents, we believe, the most comprehensive MACC Study performed to date.

The Study finds opportunities for continuous improvement, particularly in Production and Midstream segments, yet acknowledges that the cohort of companies participating in ONE Future has been much more aggressive in addressing methane emissions than the sector at large.

Readers are cautioned that the findings in this Study relate only to an assessment of ONE Future's collective success and is intended to help identify opportunities for continuous improvement; it should not necessarily be used to interpolate the MACC for an individual operator nor to extrapolate the potential for the sector at large.

Jim Kibler
Executive Director
April 14, 2026