

A scenic landscape photograph of a river valley. In the foreground, there are green evergreen trees. The middle ground shows a wide river flowing through a valley, with a suspension bridge crossing it. The background features majestic mountains, some with snow-capped peaks, under a bright sky with a sunburst effect in the upper left corner.

Northwest Regional Forecast of Power Loads and Resources

Regional Utility Perspective

NWGA Annual Energy Conference | June 4, 2025

Aliza Seelig, Analytics & Policy Director, PNUCC

Northwest Regional Forecast: Sum of regional utility plans



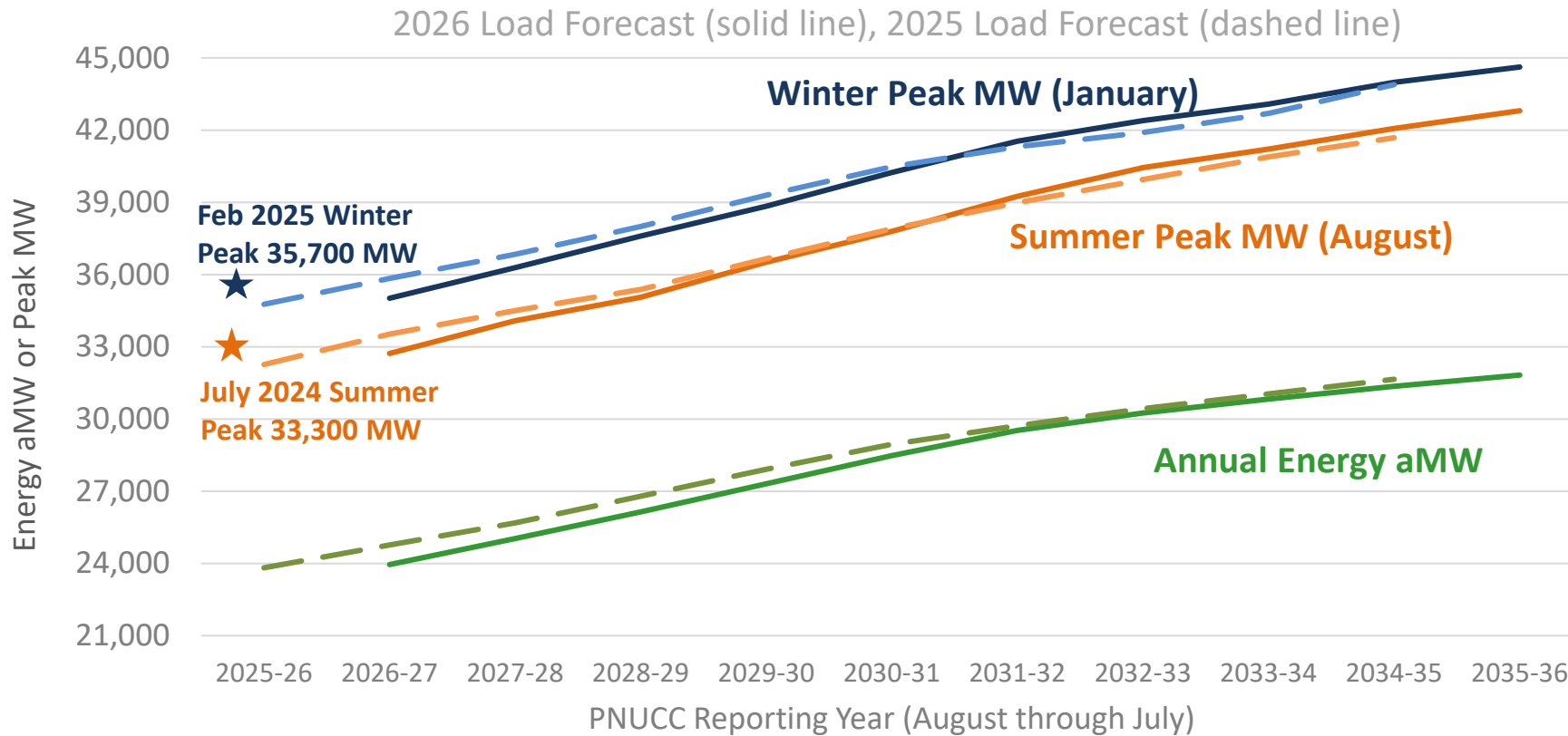
- Annual update on the evolving state of the Northwest power system
- Information provided by utilities and the Bonneville Power Administration
- Tracks trends using consistent assumptions for annual energy, winter and summer peak
- Power Act footprint (WA, OR, ID, western MT)

Key Takeaways

The Northwest has entered a new electricity demand era

- 10-Year load forecast remains in line with recent projections
- Regional capacity gap remains substantial
- Firm capacity reductions must be replaced
- Strategic investment and regional coordination are necessary

10-Year Load Forecast Remains in Line with Previous Projections



Annual Growth Rates

Winter Peak	10 year
2026 Forecast	2.7%
2025 Forecast	2.6%

Summer Peak	10 year
2026 Forecast	3.0%
2025 Forecast	2.9%

Energy	10 year
2026 Forecast	3.2%
2025 Forecast	3.2%

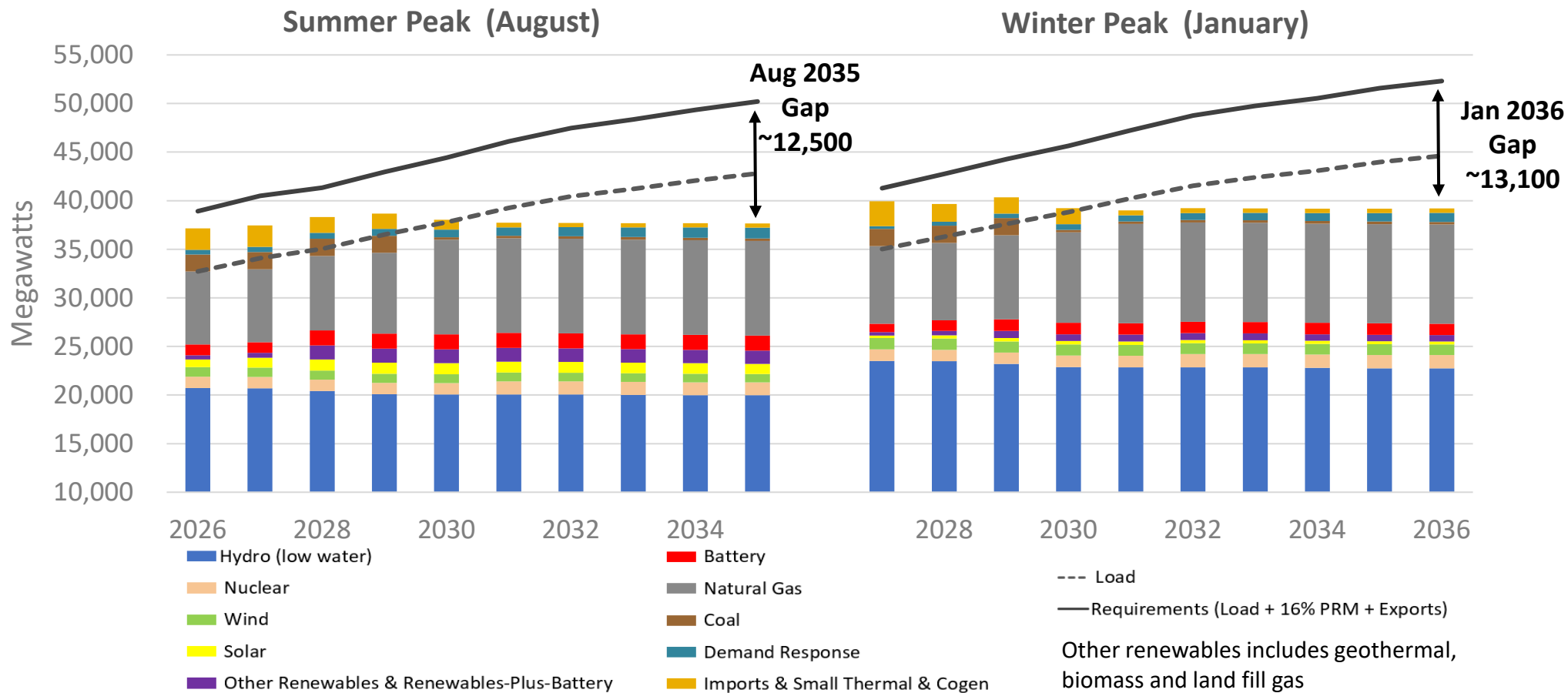
Notes:

- Expected (1-in-2) load net of energy efficiency
- Includes only PacifiCorp West and 1/3 of NorthWestern Energy

Regional Capacity Gap Remains Substantial

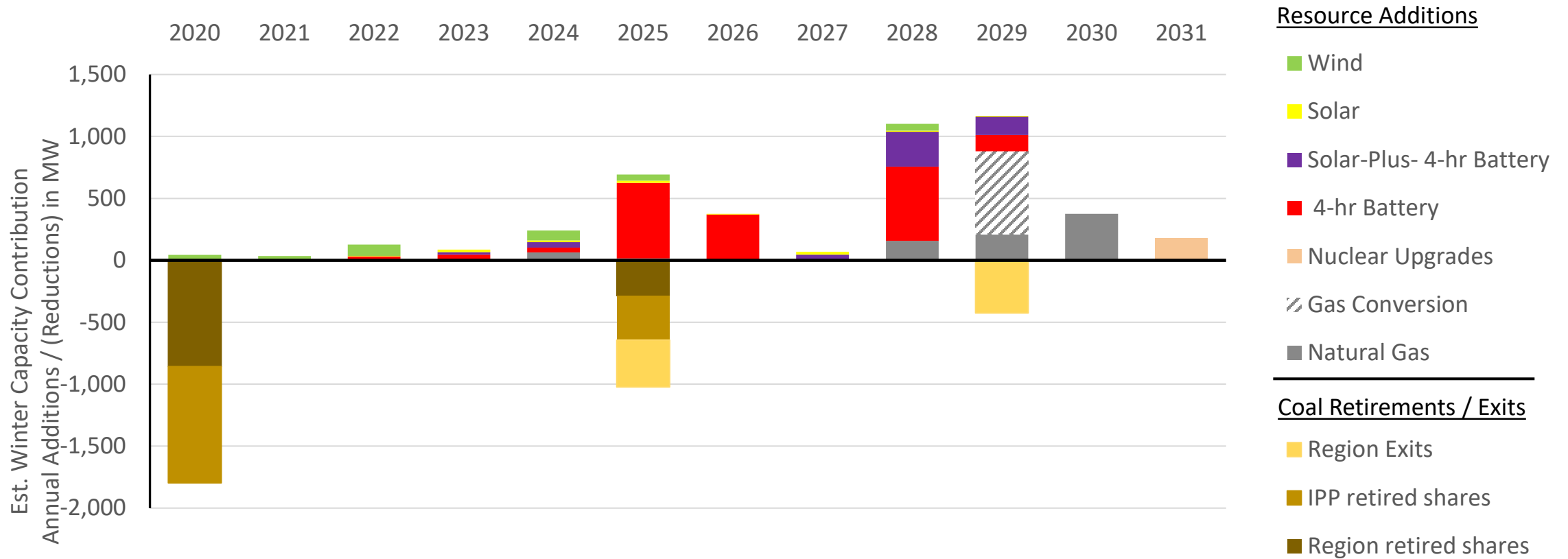
Summer and Winter Peak Hour

(Existing, Acquired and Committed Resources)



- Notes:
- PNUCC's methodology to calculate the gap
 - Does not include the prospective or needed future resources
 - Expected (1-in-2) load net of energy efficiency

Firm Capacity Reductions and Recent Resource Additions (estimated **winter** capacity contribution – MW)

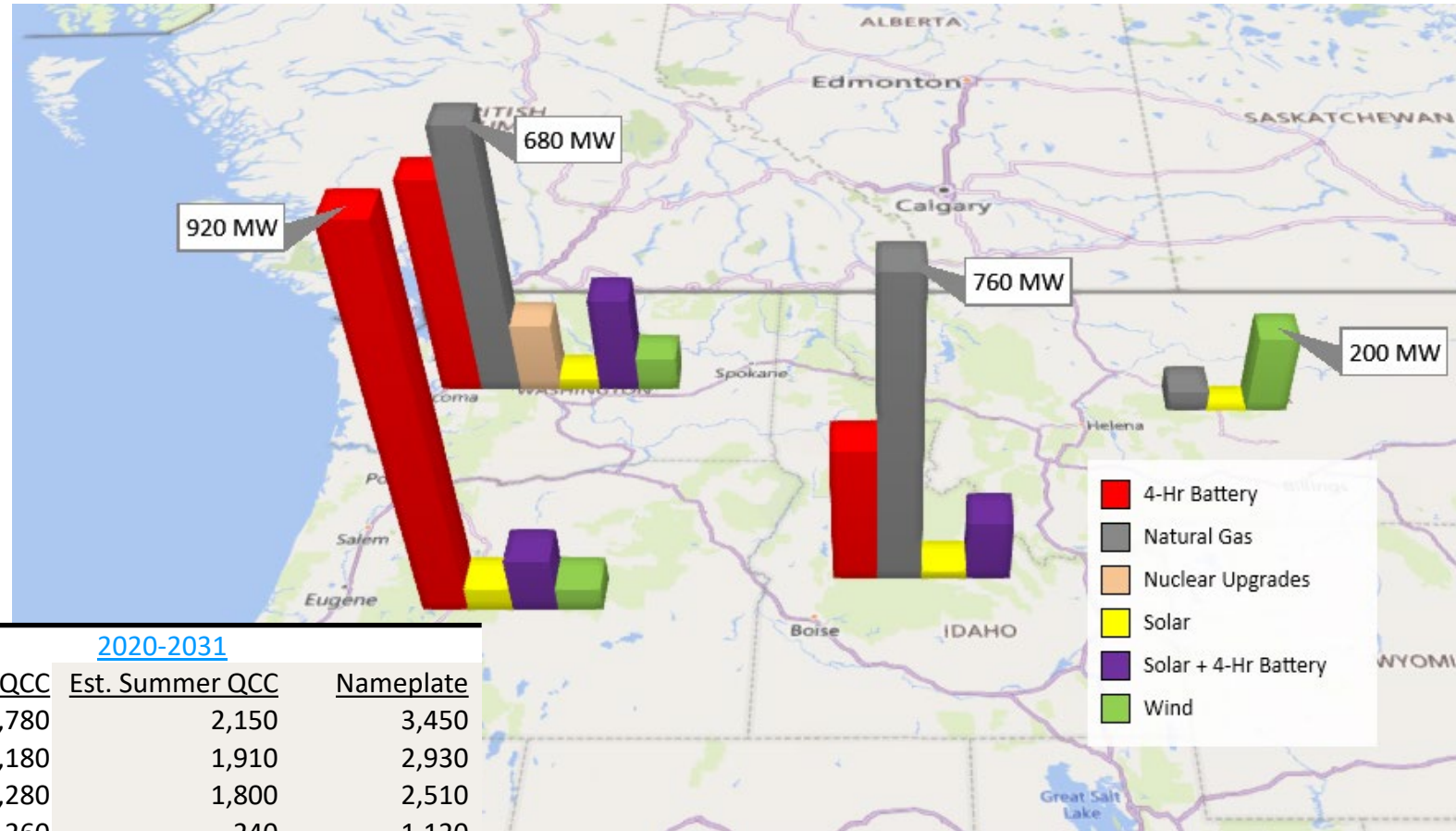


Note: includes Boardman, Centralia 1 and 2, and Colstrip

Where is the region building resources?

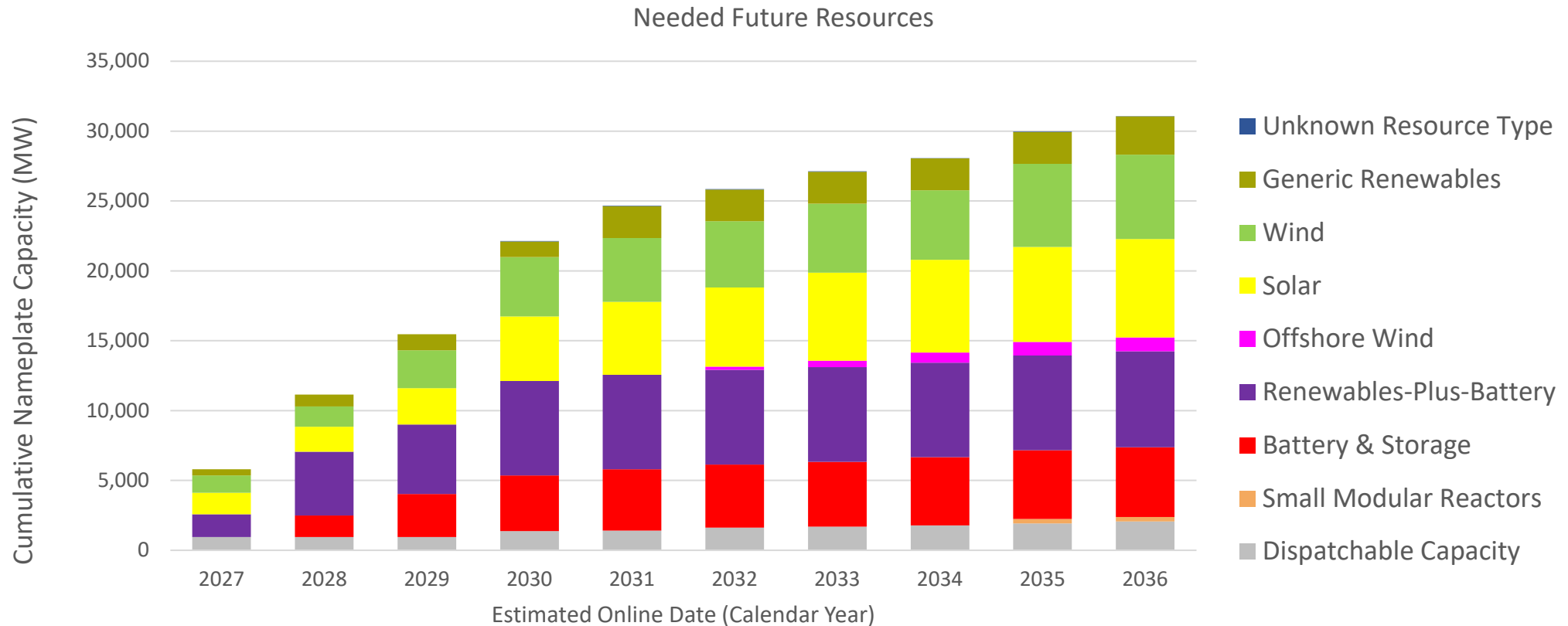
Acquired and committed new build resources 2020-2031
(estimated **winter** capacity contribution – MW)

Estimated Qualifying Capacity Contributions (QCC) based on publicly available WRAP metrics



(MW)	2020-2031		Nameplate
	Est. Winter QCC	Est. Summer QCC	
Washington	1,780	2,150	3,450
Oregon	1,180	1,910	2,930
Idaho	1,280	1,800	2,510
Montana	260	240	1,120
Total	4,490	6,100	10,010

Strategic Investment and Regional Coordination



Storage includes 4hr to 24hr+ and pumped hydro

Dispatchable capacity includes plants fueled by natural gas, biodiesel and unknown

A scenic landscape photograph of a river valley. The river flows through a lush green forested valley, with a suspension bridge crossing it in the distance. The background features majestic mountains, some with snow-capped peaks, under a bright sky with a sunburst effect in the upper left corner. The overall scene is vibrant and natural.

The *Northwest Regional Forecast* can be found at pnucc.org

Thank you!

Aliza Seelig

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2026 Preview

PNW Natural Gas Outlook

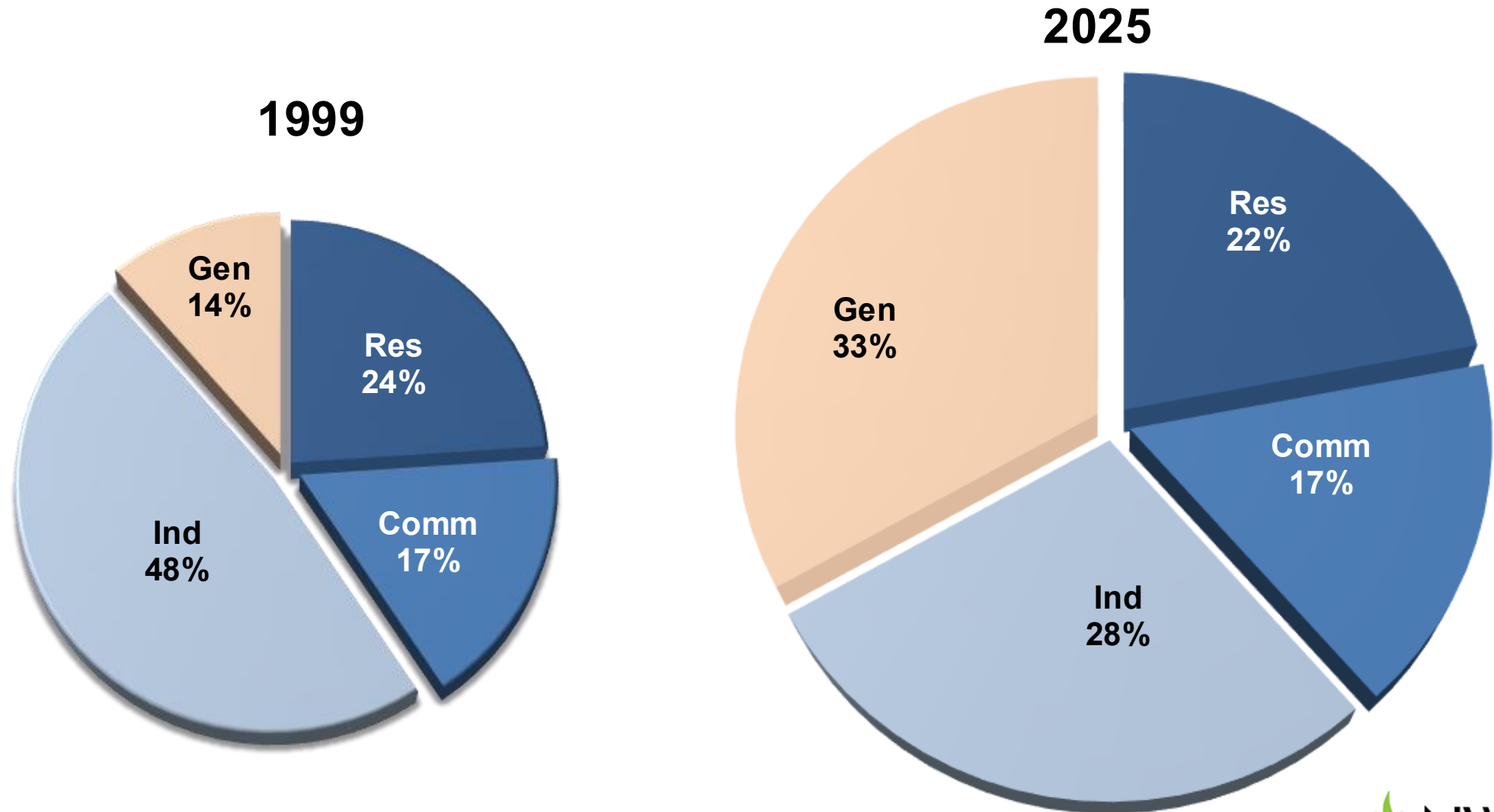
Kelly Fukai, CEO
Northwest Gas Association

The Outlook

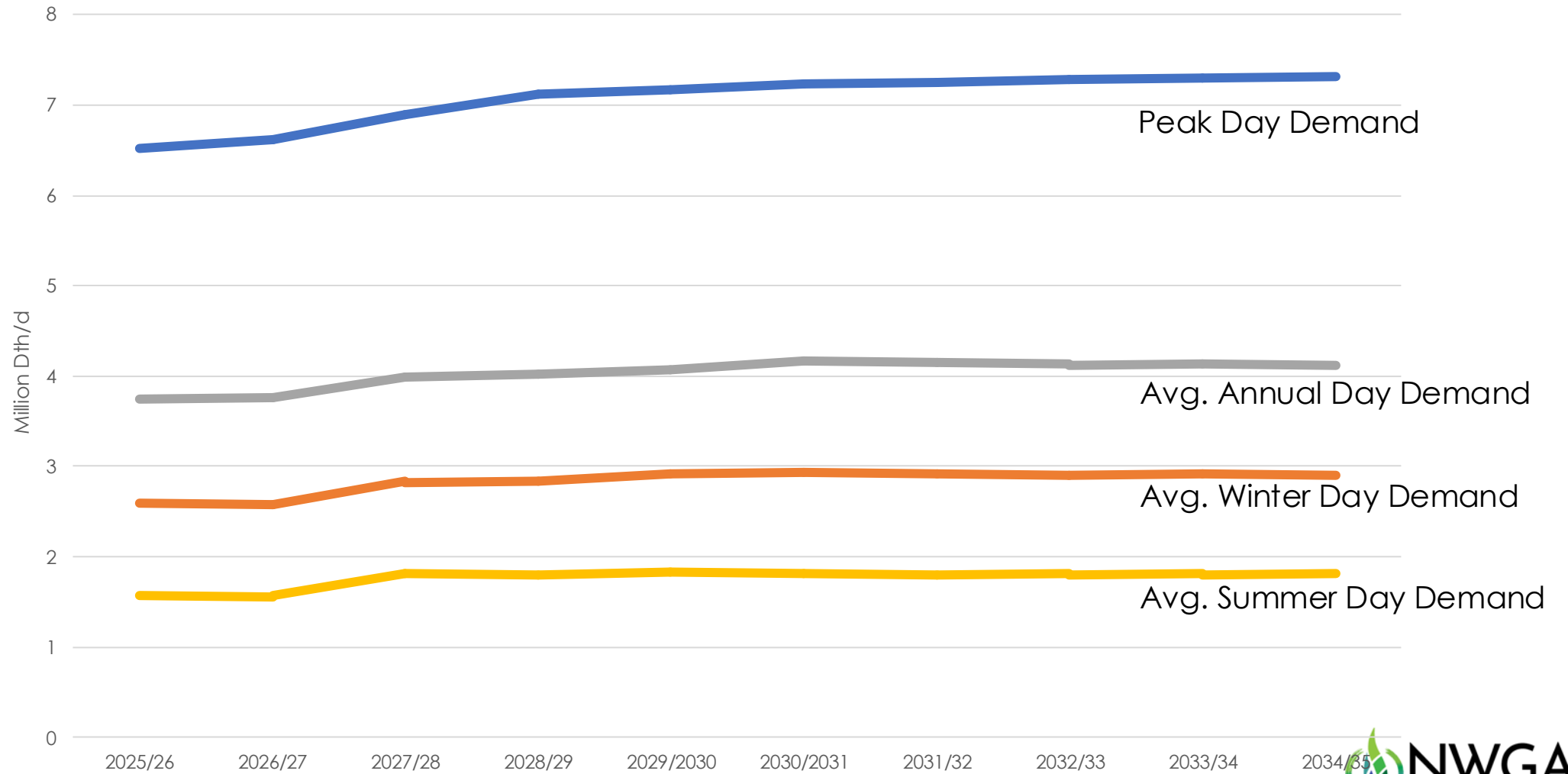
Sum of regional utility plans

- Biennial update on the state of the natural gas system
- Data sourced from utilities and transmission pipelines
- Covers annual and peak demand, supply utilization, and policy trends
- Region: British Columbia, Idaho, Oregon, and Washington

A New Demand Profile

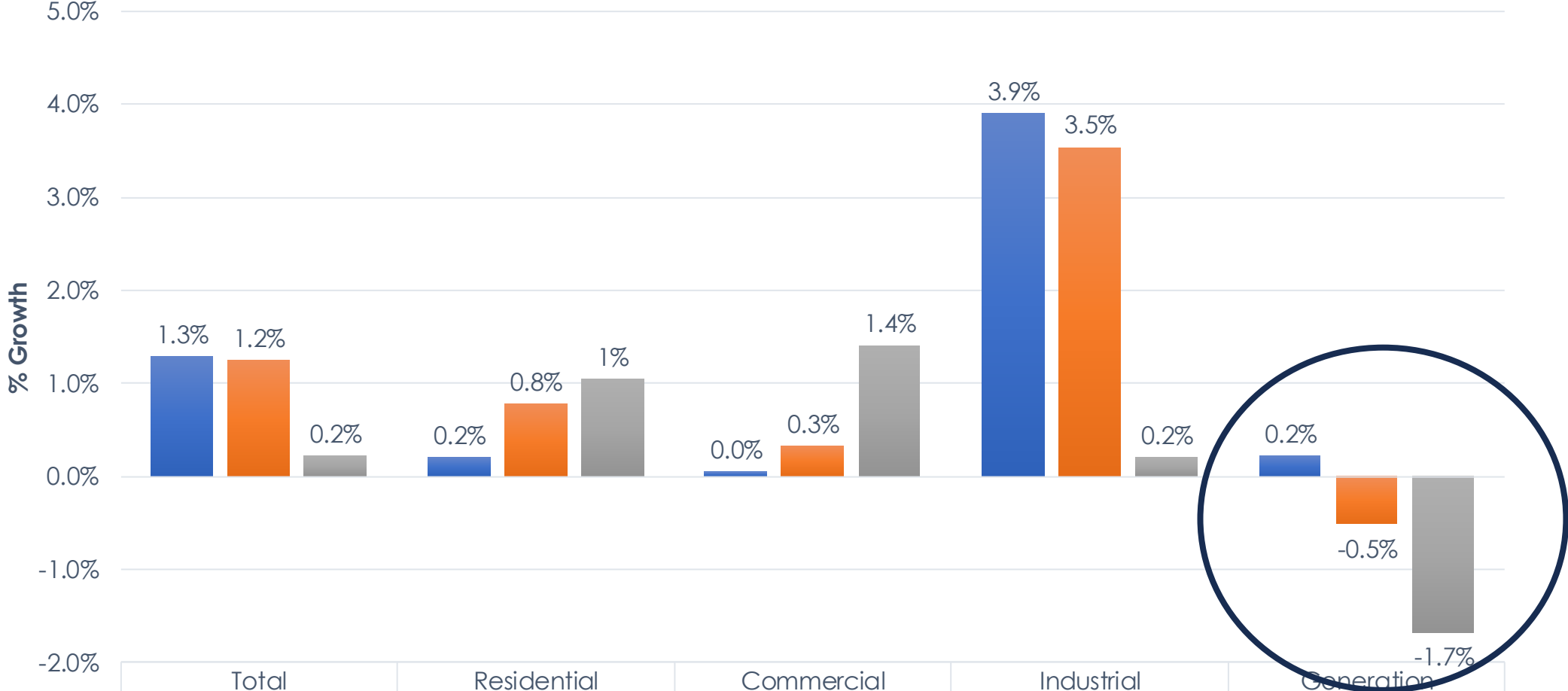


Forecasted Demand is Constrained



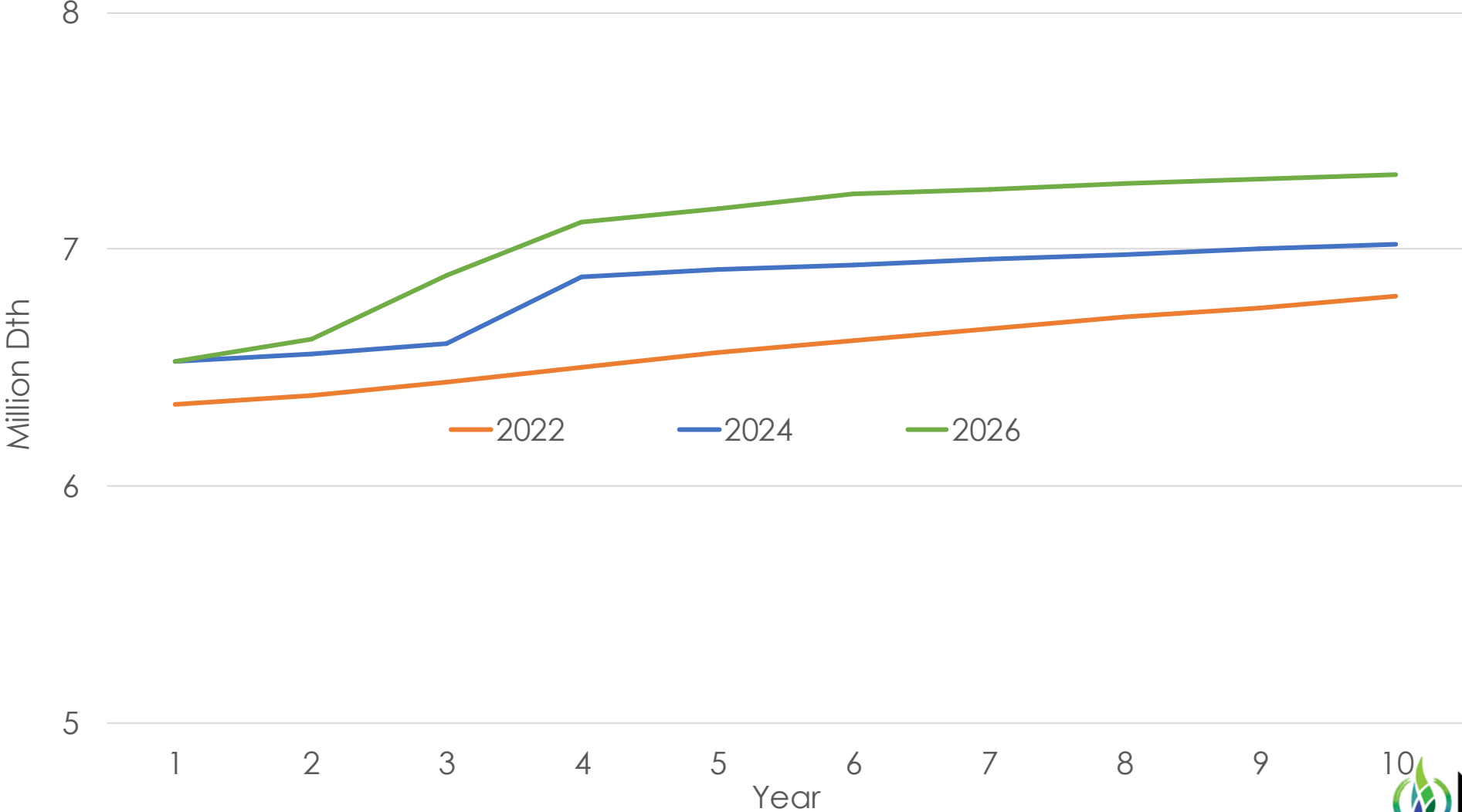
Sector Changes

Expected Annual Demand Growth Comparison



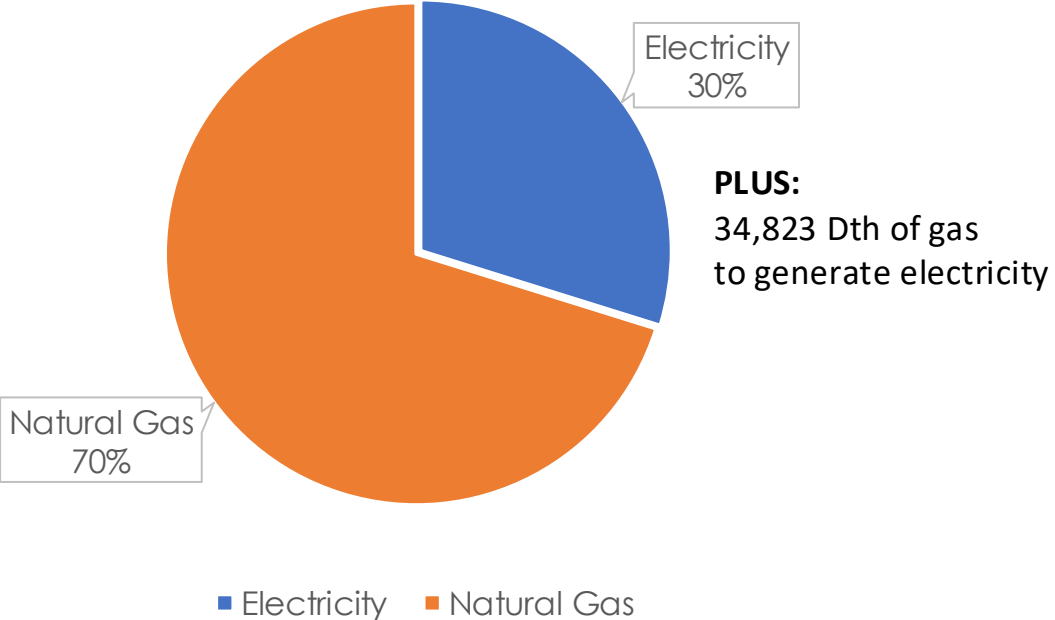
	Total	Residential	Commercial	Industrial	Generation
2026	1.3%	0.2%	0.0%	3.9%	0.2%
2024	1.2%	0.8%	0.3%	3.5%	-0.5%
2022	0.2%	1%	1.4%	0.2%	-1.7%

Peak Day Forecast Comparison



During Severe Weather Natural Gas is the Primary Energy Source

OR & WA Combined
Jan 14, 2024, 9am-10am



“On the coldest day of the year, the natural gas system delivers 3X more energy than the electric system delivers on the hottest day of the year.”

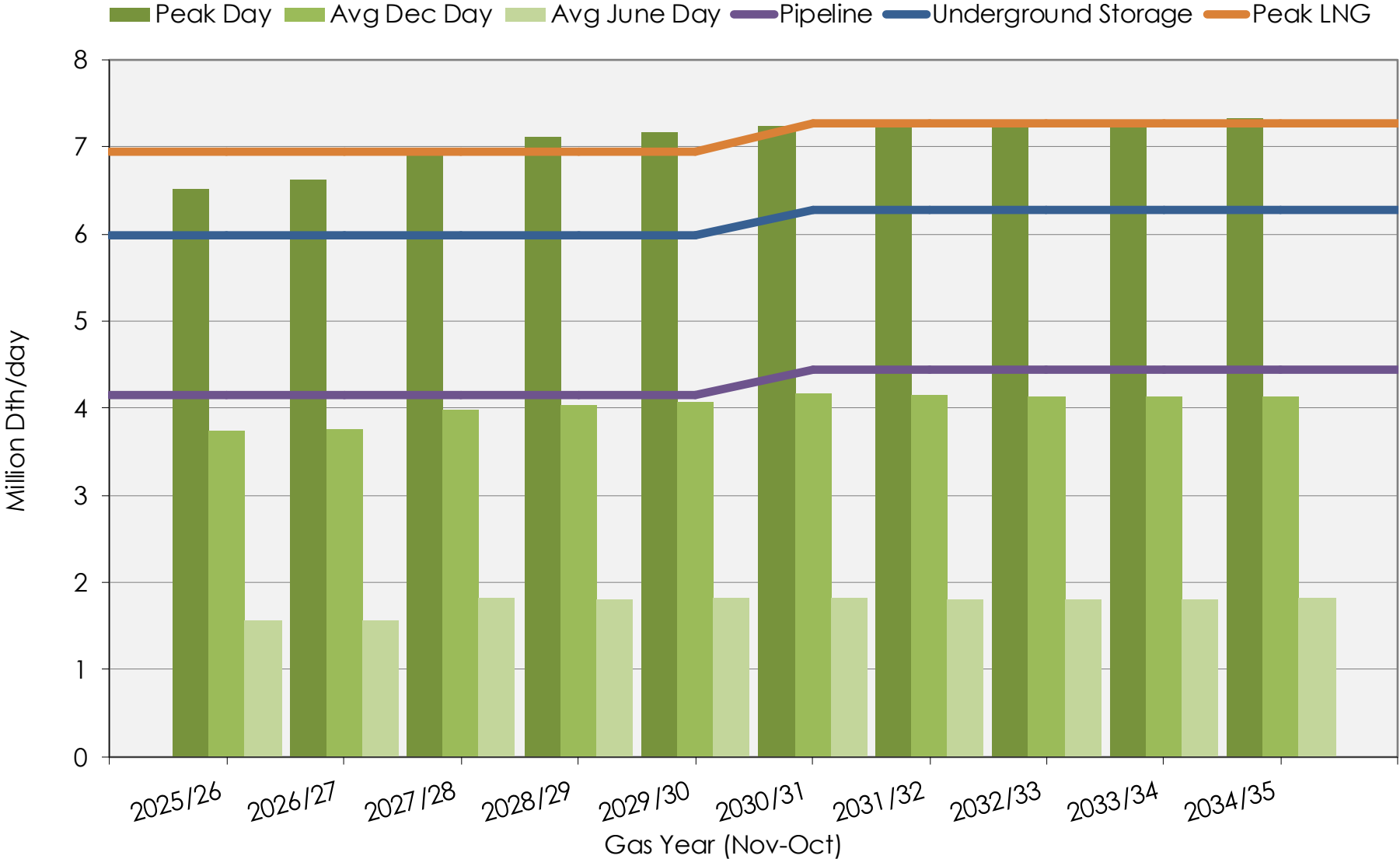
Source: 2026 AGA Playbook

92,829 Dth delivered via electric system (27,206 MW)

218,546 Dth delivered via gas system (64,050 MW)



Peak Demand outpaces Capacity



Key Takeaways

- Regional gas demand is tempered by policy
- No room for error - capacity is maxed out and we aren't building anything fast enough
- Uncertainty abounds
- Strategic investment and regional coordination are critical



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Thank You!

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