NW Gas Market Outlook: Winds of Change

California Energy Commission

Natural Gas Workshop

December 1, 2011

NWGA
NORTHWEST GAS ASSOCIATION

1914 Willamette Falls Dr., #255
West Linn, OR 97068
(503) 344-6637
www.nwga.org

NWGA Members:

Avista Corporation

Cascade Natural Gas Co.

FortisBC Energy

Intermountain Gas Co.

NW Natural

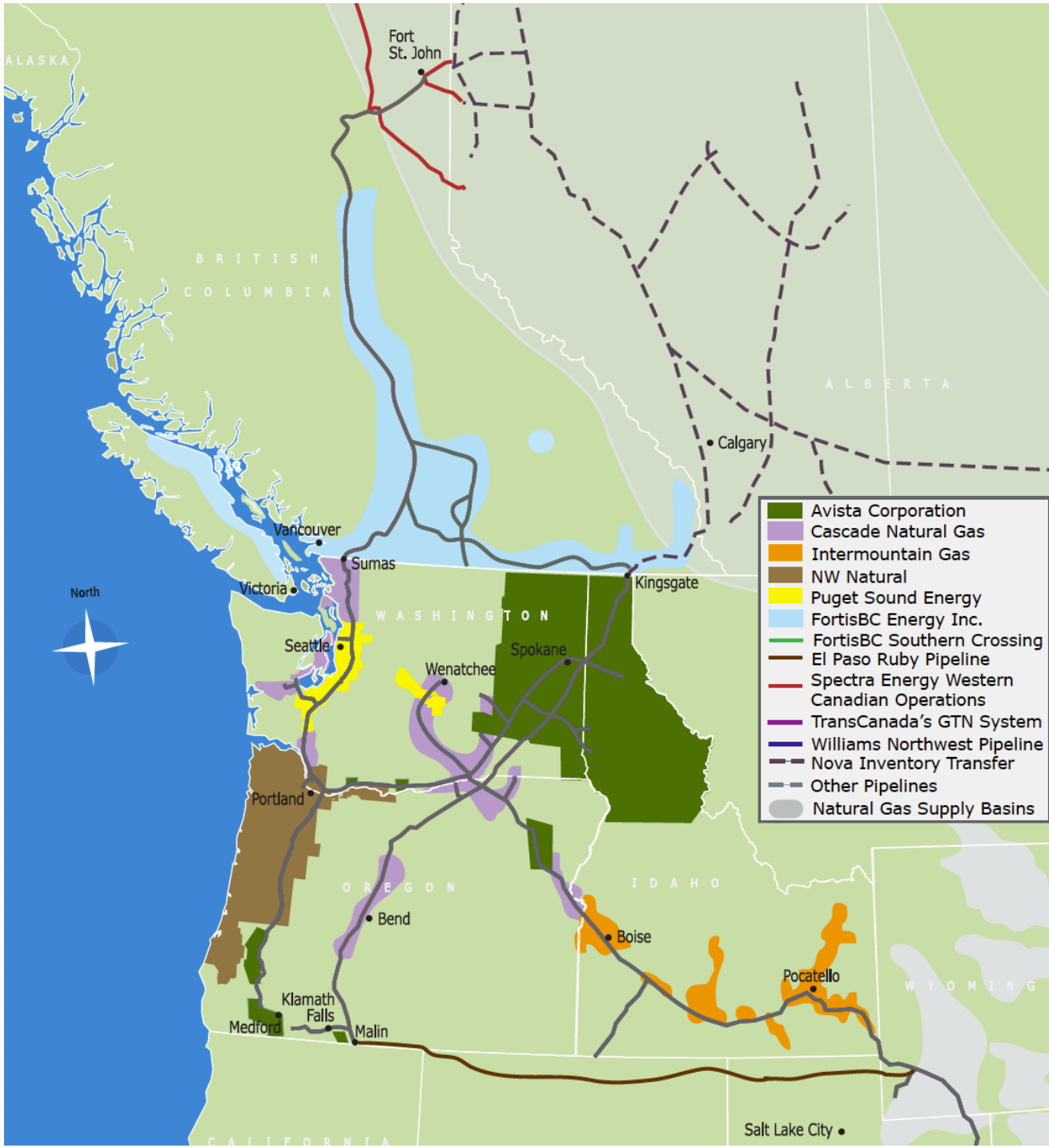
Puget Sound Energy

El Paso Ruby Pipeline

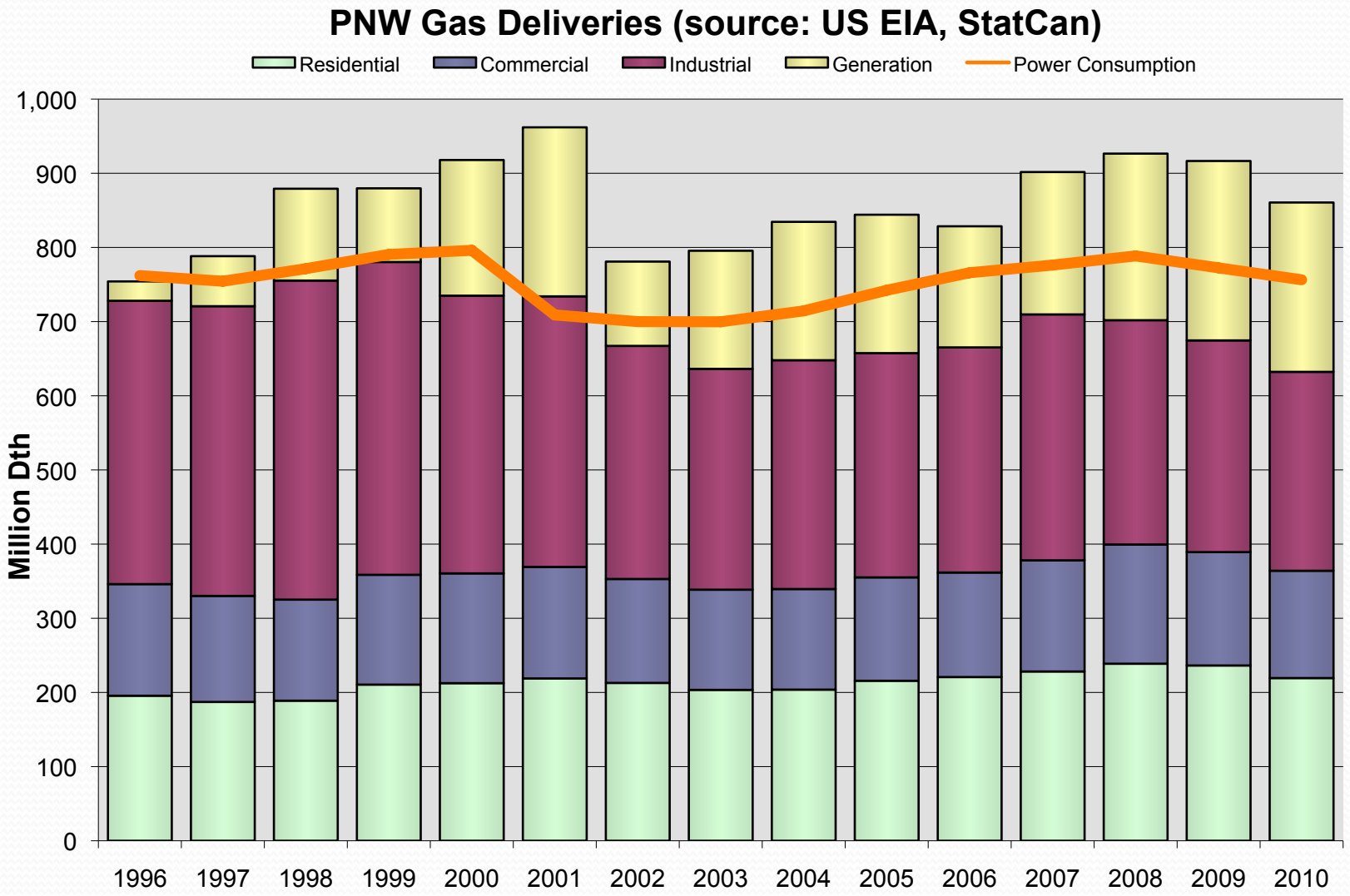
Spectra Energy Transmission

TransCanada GTN System

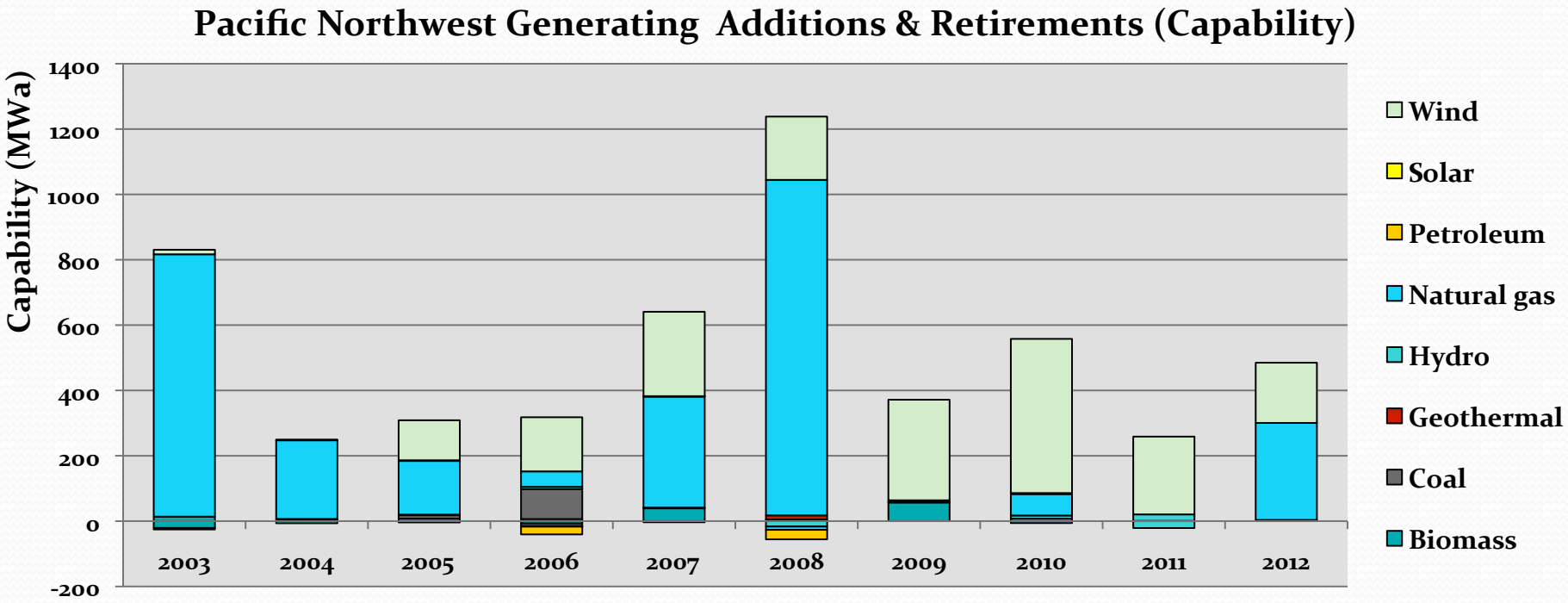
Williams NW Pipeline



Recent Gas Demand



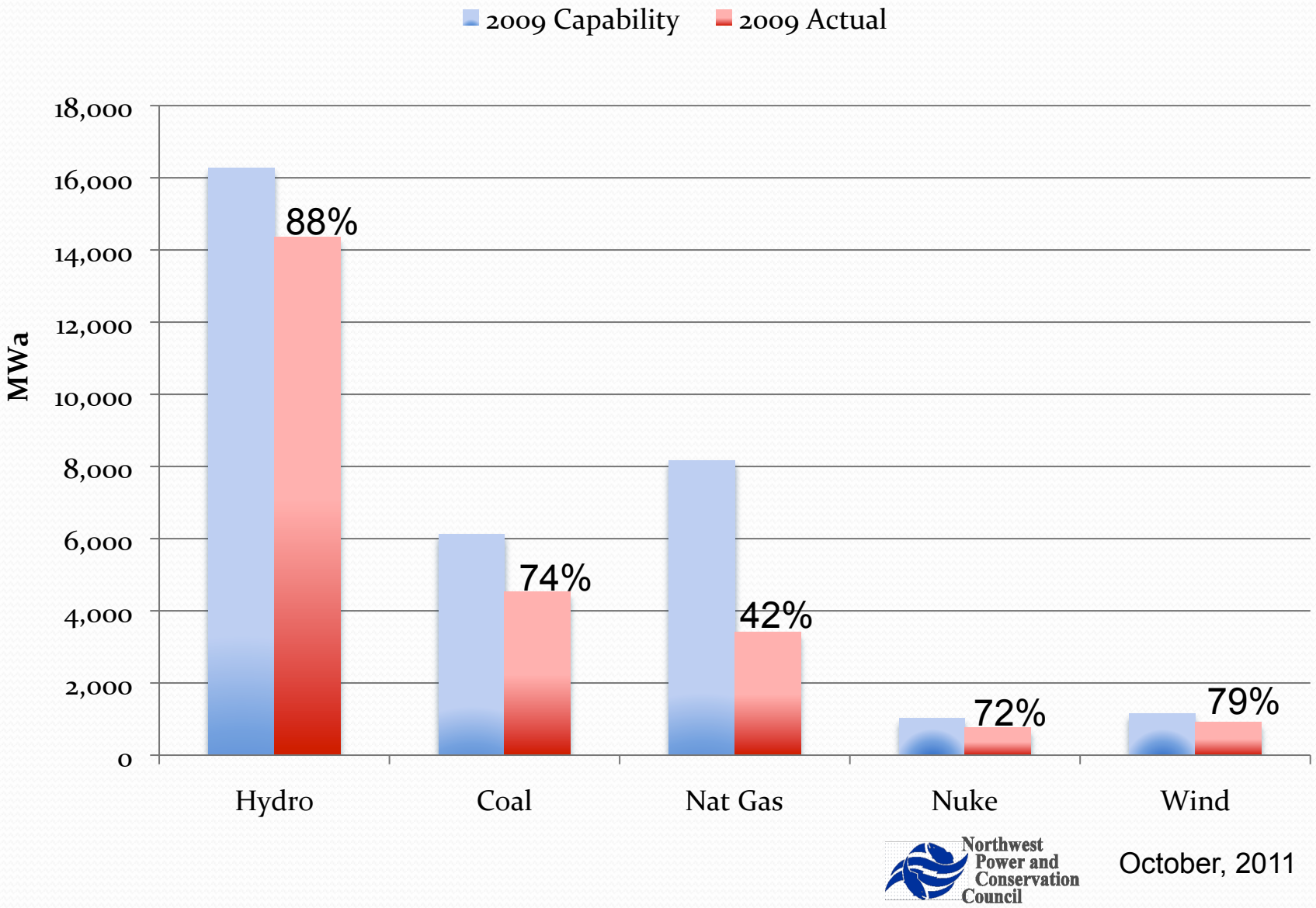
Market & Policy Drives Generation Builds



October, 2011

Northwest Power and Conservation Council

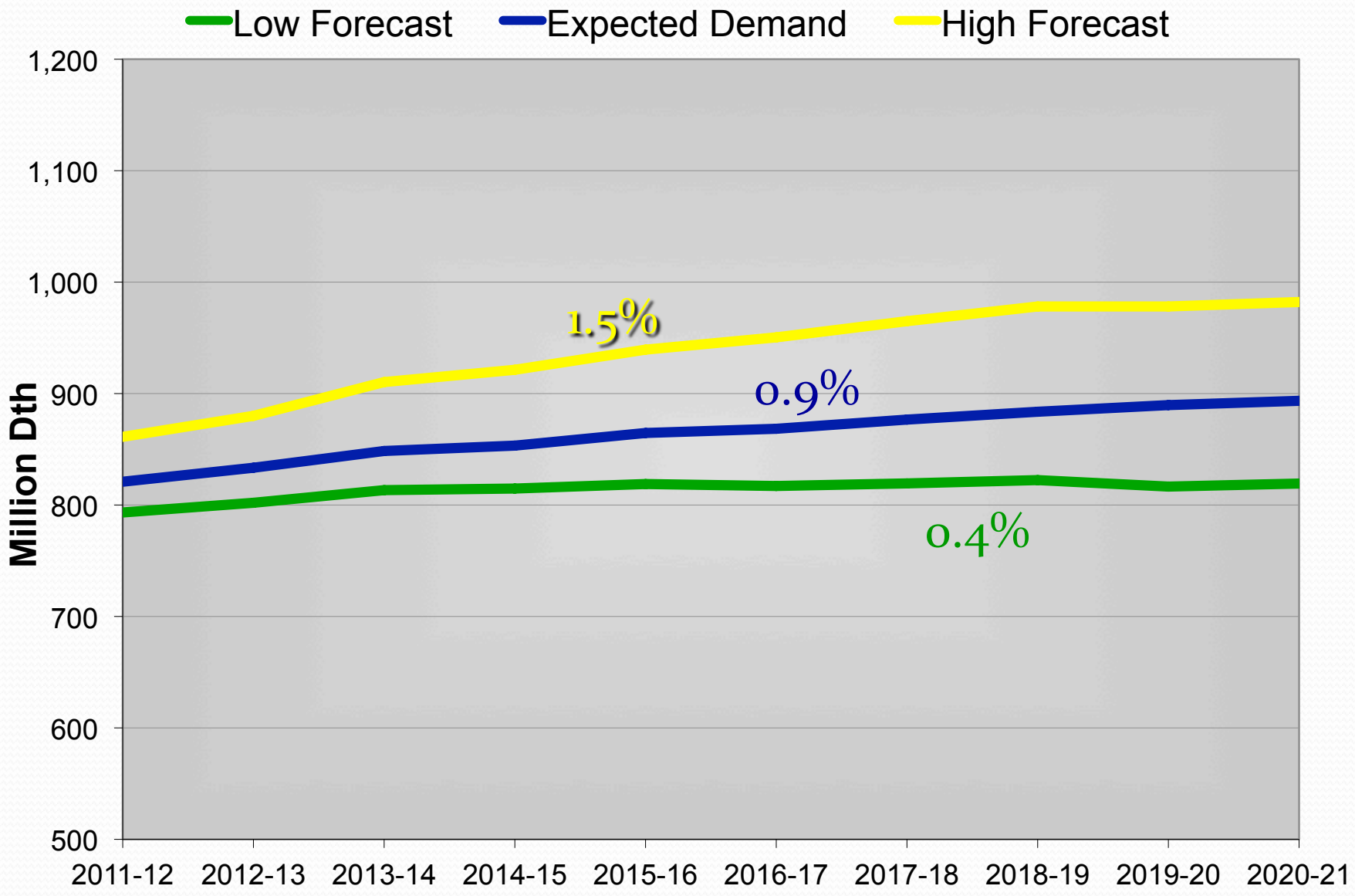
2009 Energy By Source



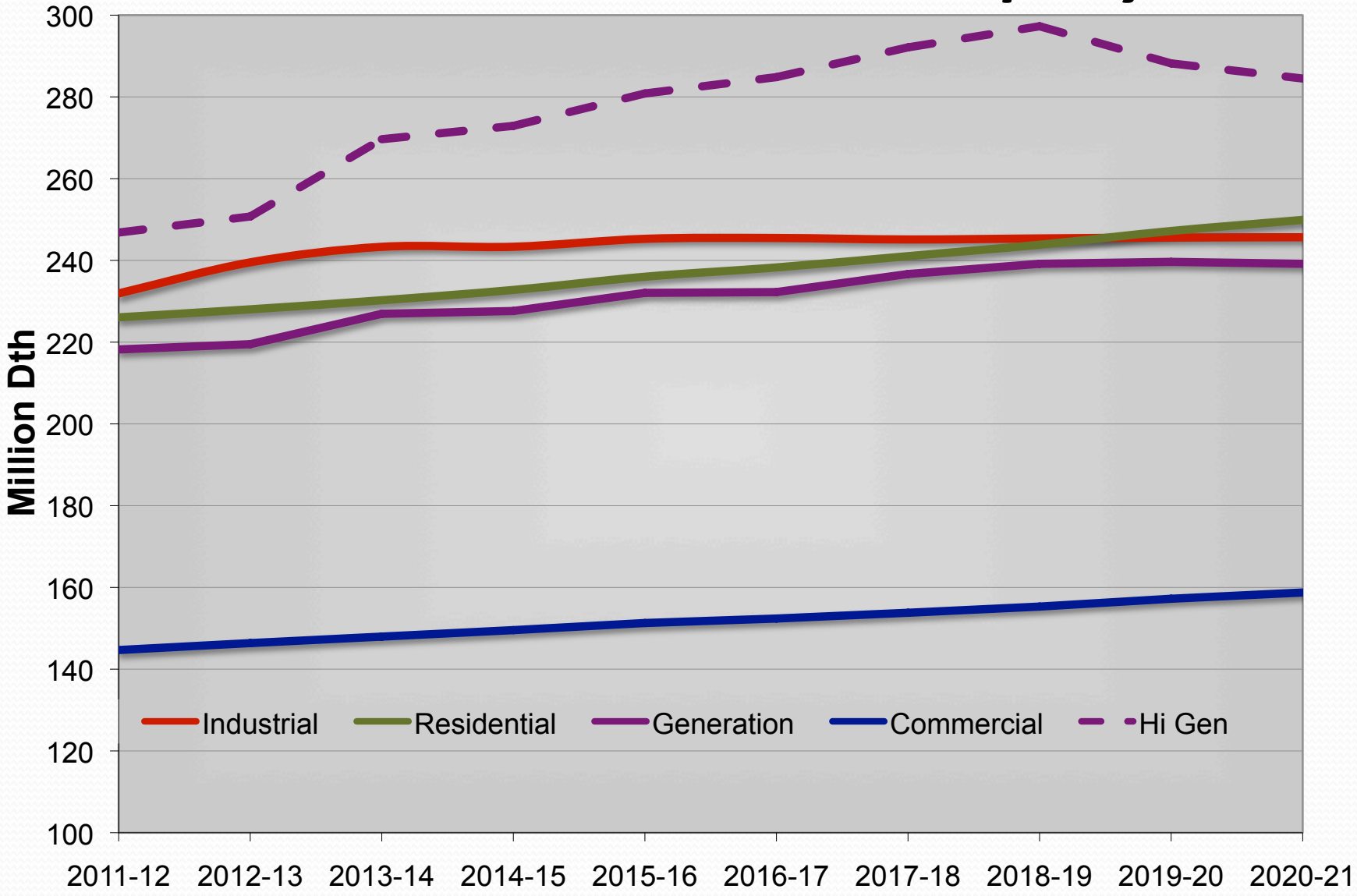
Northwest Power and Conservation Council

October, 2011

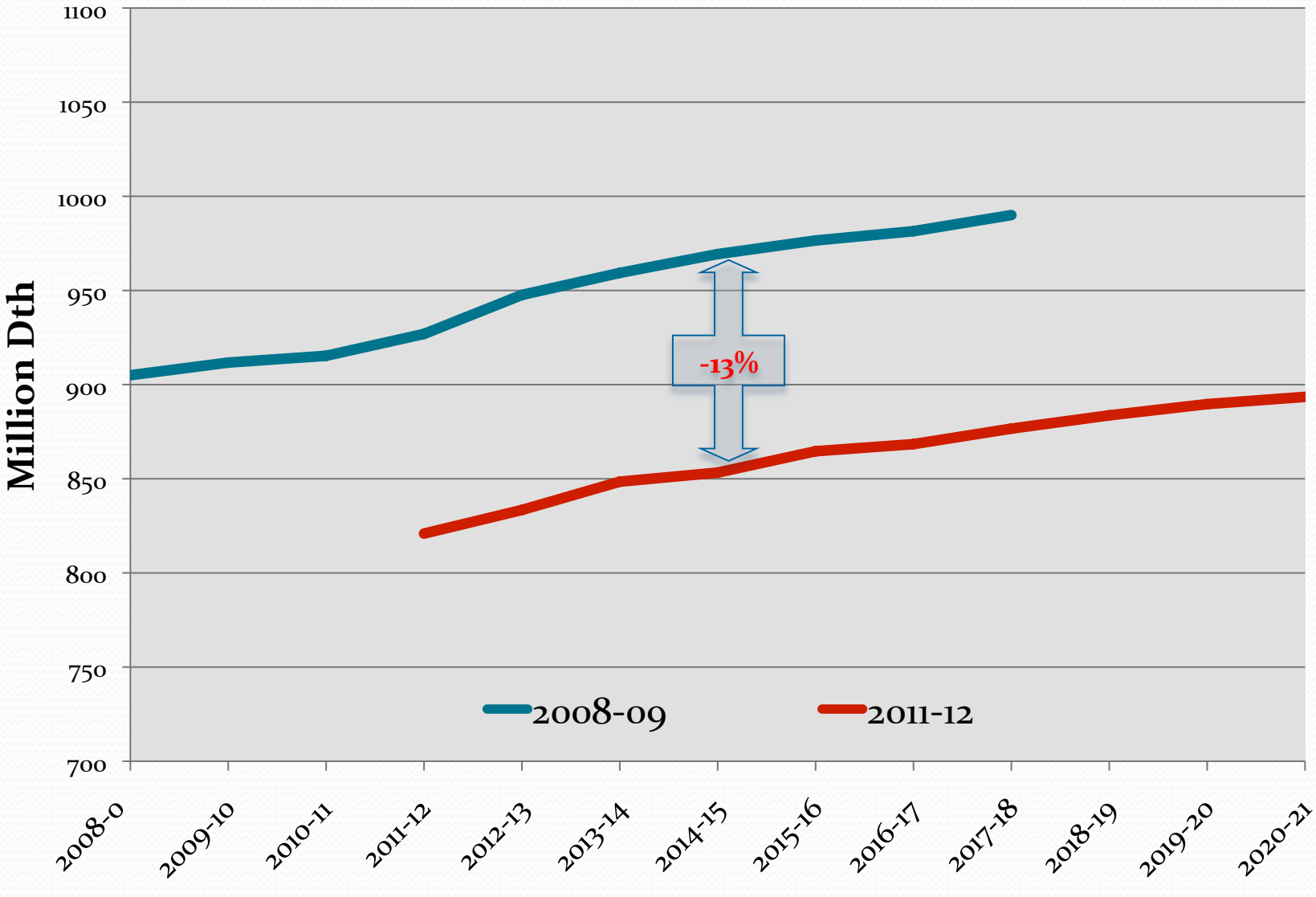
Demand Forecast



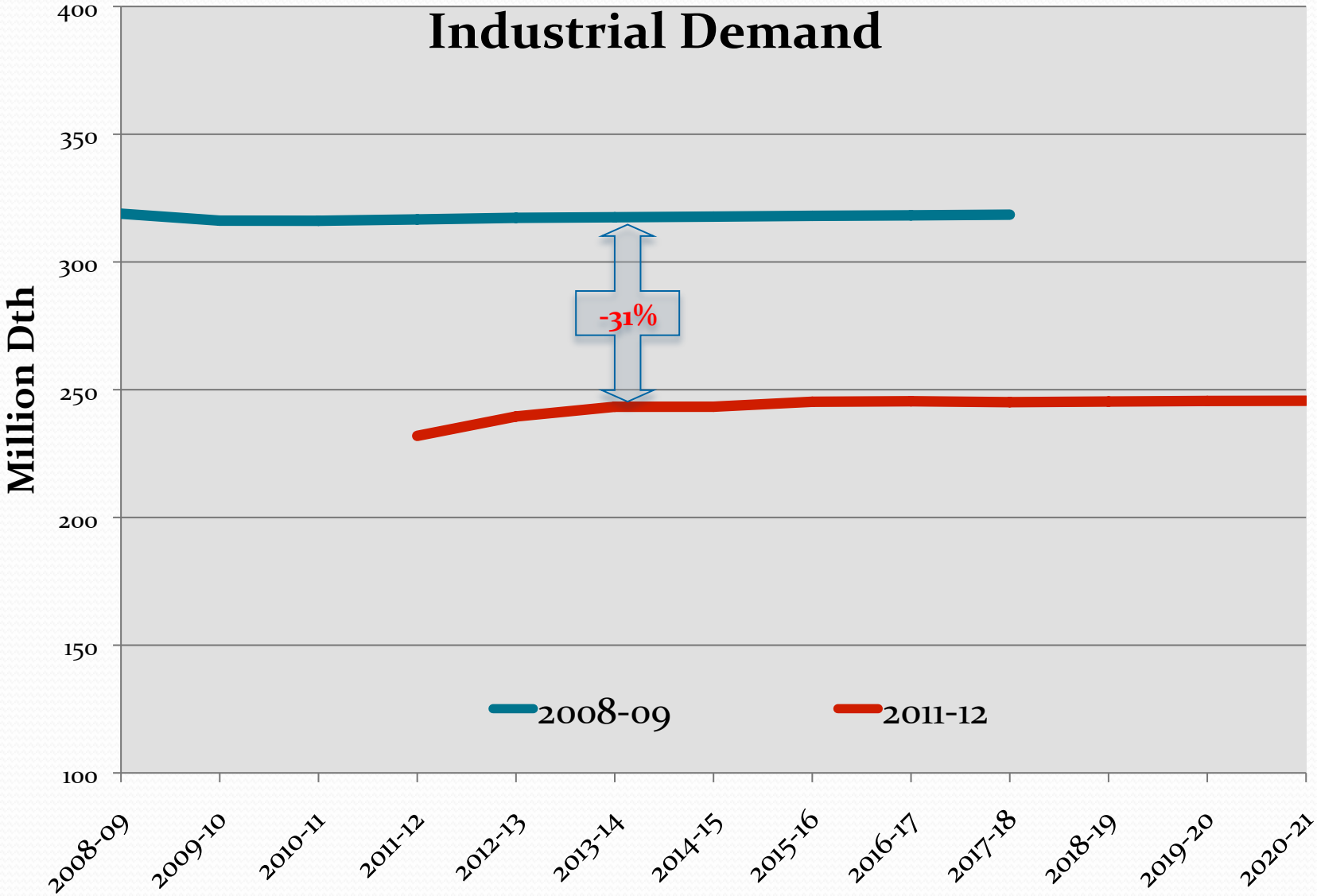
Base Case Forecast Growth: 0.9% per year



Pre-Recession Forecast Comparison

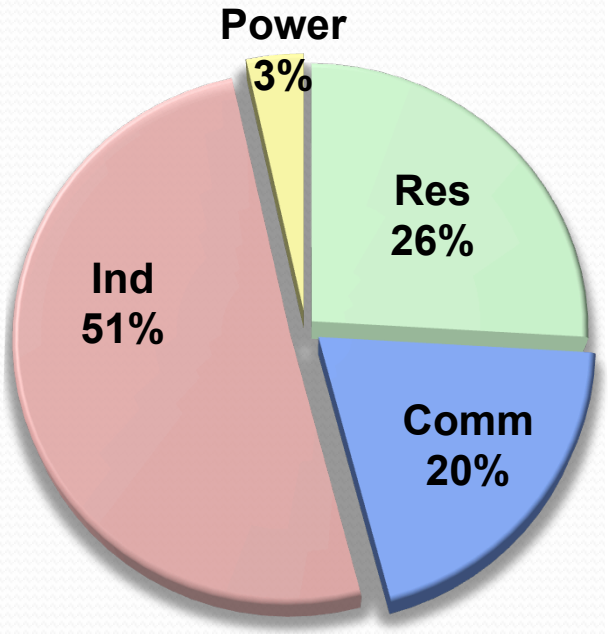


Decline in Projected Industrial Use

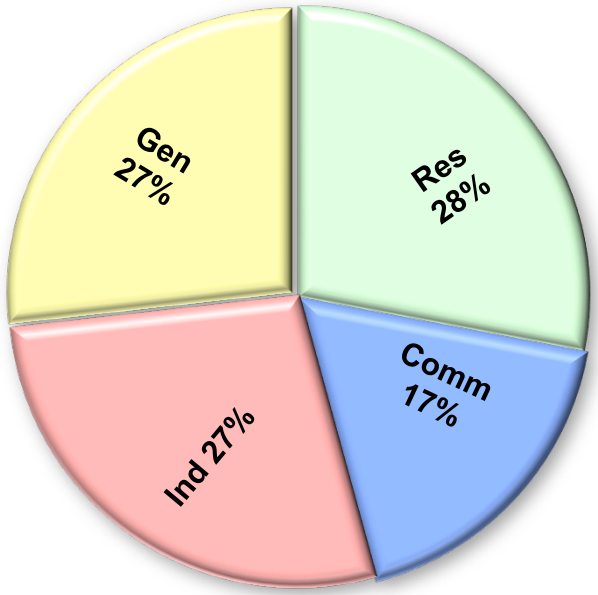


Demand Composition

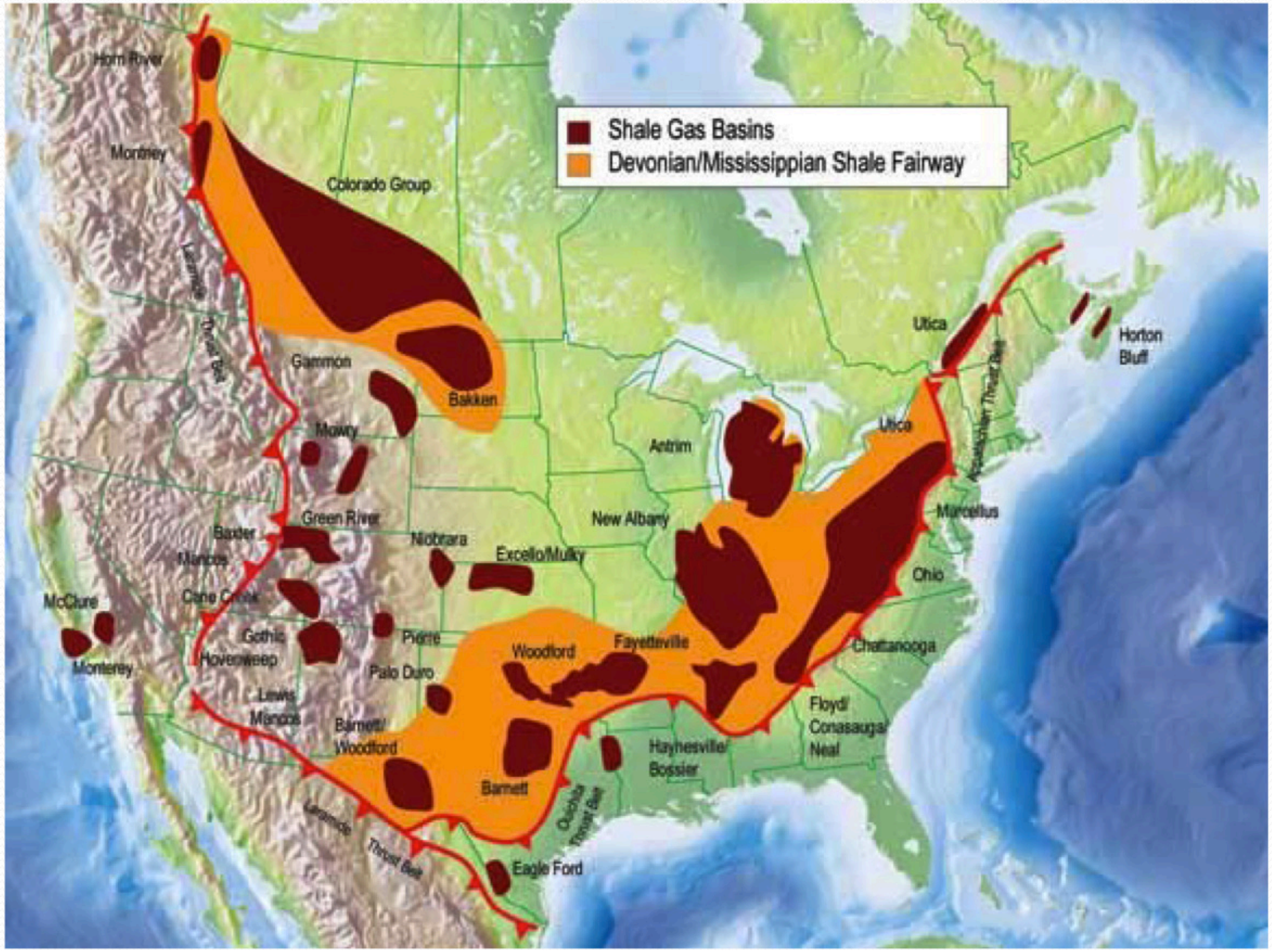
1996



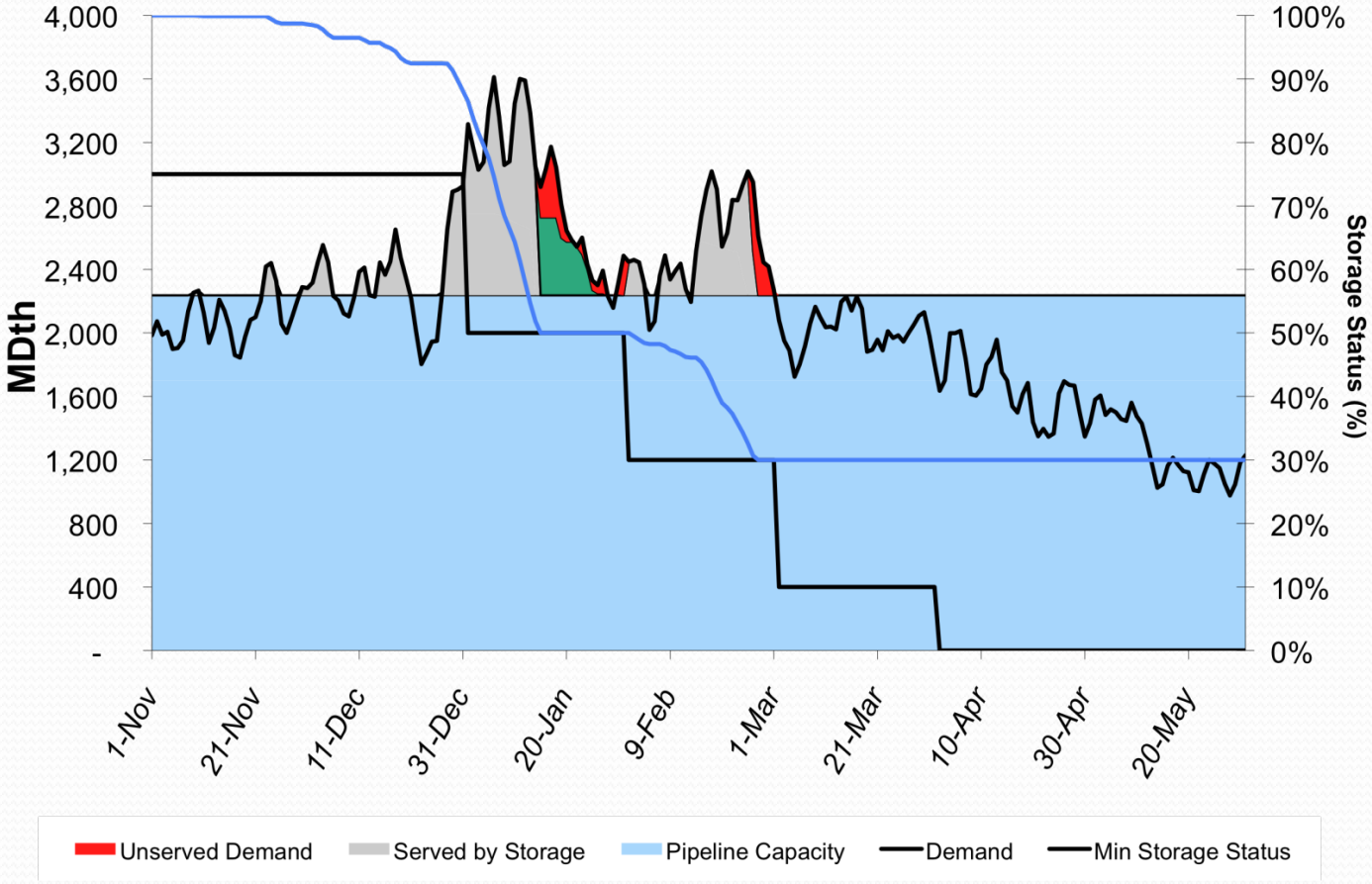
2020-21



Shale Gas Changes Everything

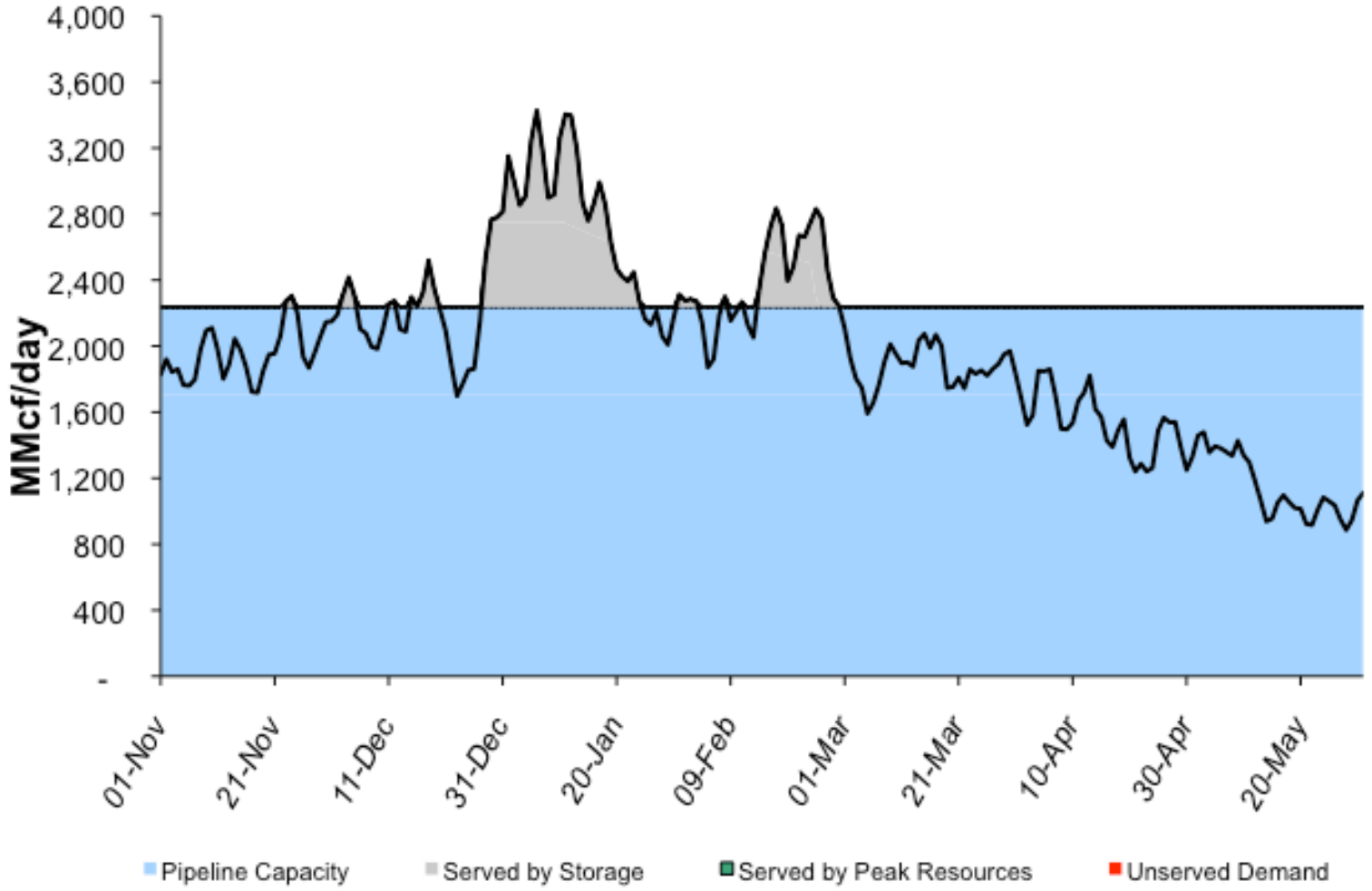


08 Outlook - Winter Capacity *(2017-18 CTN)*

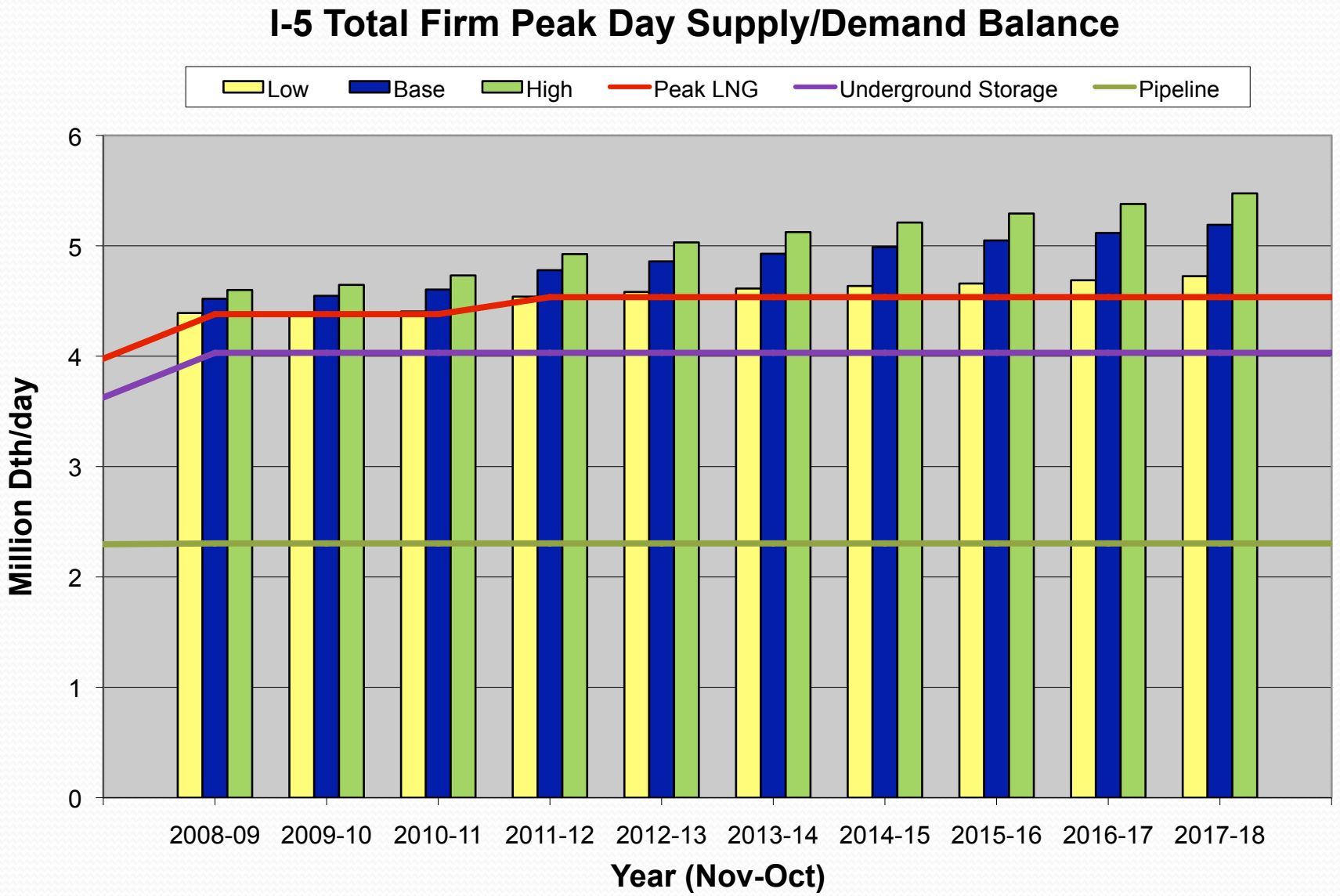


Winter-long Capacity

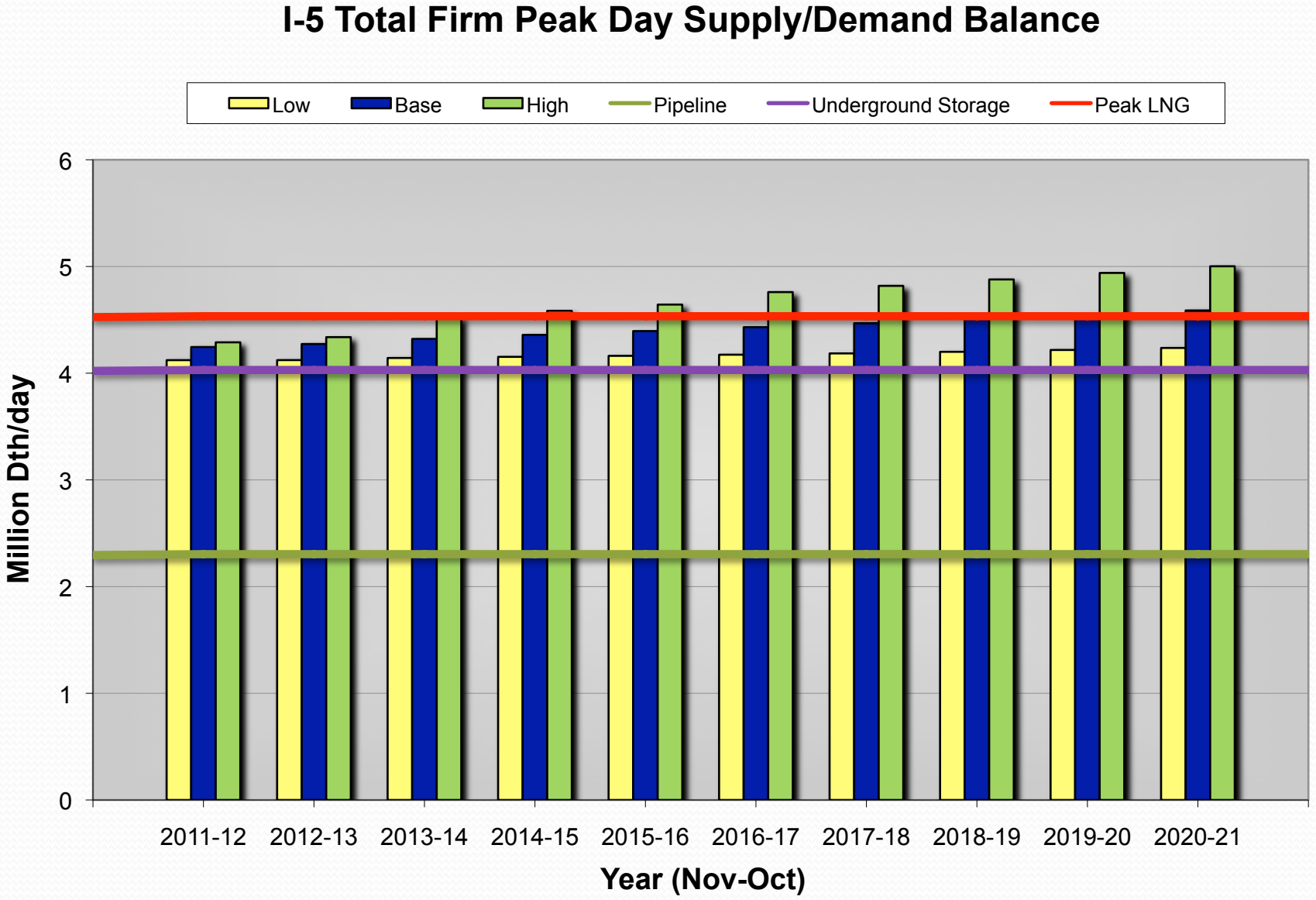
CTN: 2019-20, Expected Demand



2008 Peak Capacity I-5 Corridor



Current Peak Capacity I-5 Corridor



Capacity Projects

Pipelines

- Southern Crossing Expansion
- Palomar
- Sunstone
- Blue Bridge (reconfigured)
- Ruby
- Pacific Connector
- Pacific Trail
- Oregon LNG

LNG Terminals

Kitimat LNG (export)
Bradwood Landing
Oregon LNG
Jordan Cove LNG

Storage Facilities

Mist
Jackson Prairie

NWGA
NORTHWEST GAS ASSOCIATION

1914 Willamette Falls Dr., #255
West Linn, OR 97068
(503) 344-6637
www.nwga.org

NWGA Members:

Avista Corporation

Cascade Natural Gas Co.

FortisBC Energy

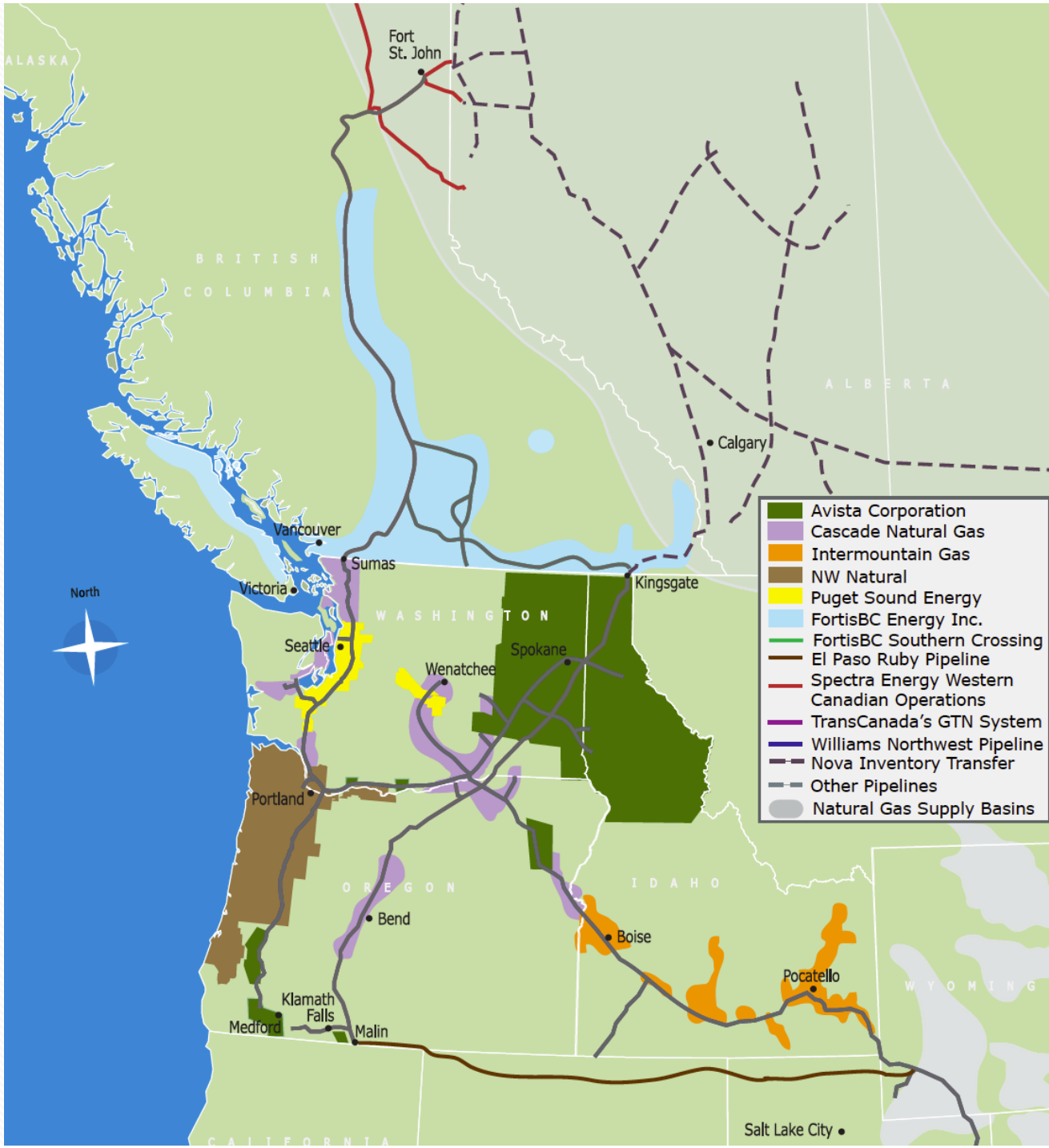
Intermountain Gas Co.

NW Natural

Puget Sound Energy

El Paso Ruby Pipeline

Spectra Energy Transmission

TransCanada GTN System

Williams NW Pipeline