2014 Northwest Gas Market Outlook

California Energy Commission

April 16, 2014

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NWGA Members:

Avista Corporation

Cascade Natural Gas Co.

FortisBC Energy

Intermountain Gas Co.

NW Natural

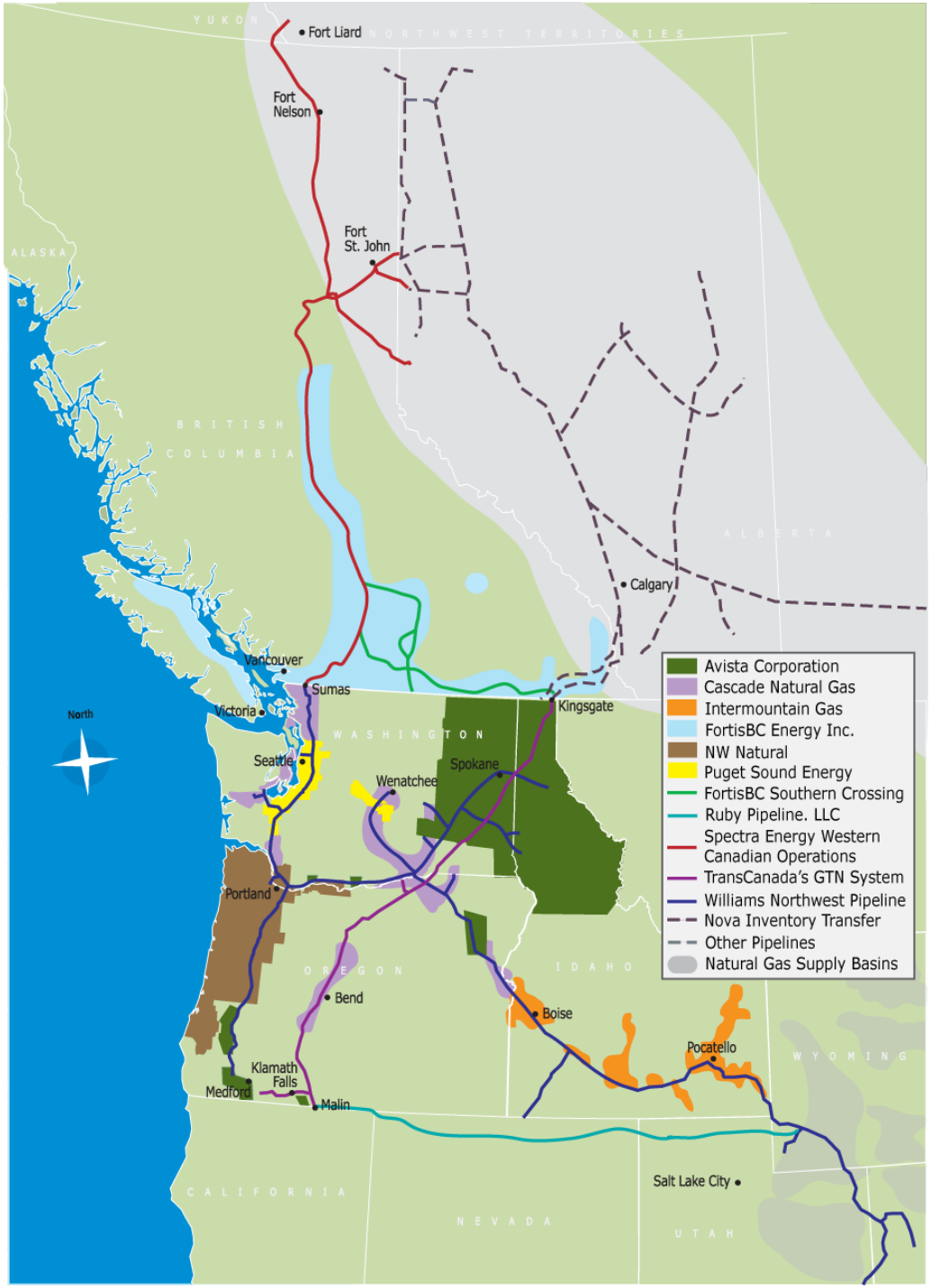
Puget Sound Energy

Kinder Morgan Ruby Pipeline

Spectra Energy Transmission

TransCanada GTN System

Williams NW Pipeline



What is the Outlook?

- A consensus regional perspective on supply, prices, demand and capacity.
- Aggregation of IRPs and other planning docs.
- Can be read/downloaded at:

  http://www.nwga.org/2014-gas-outlook

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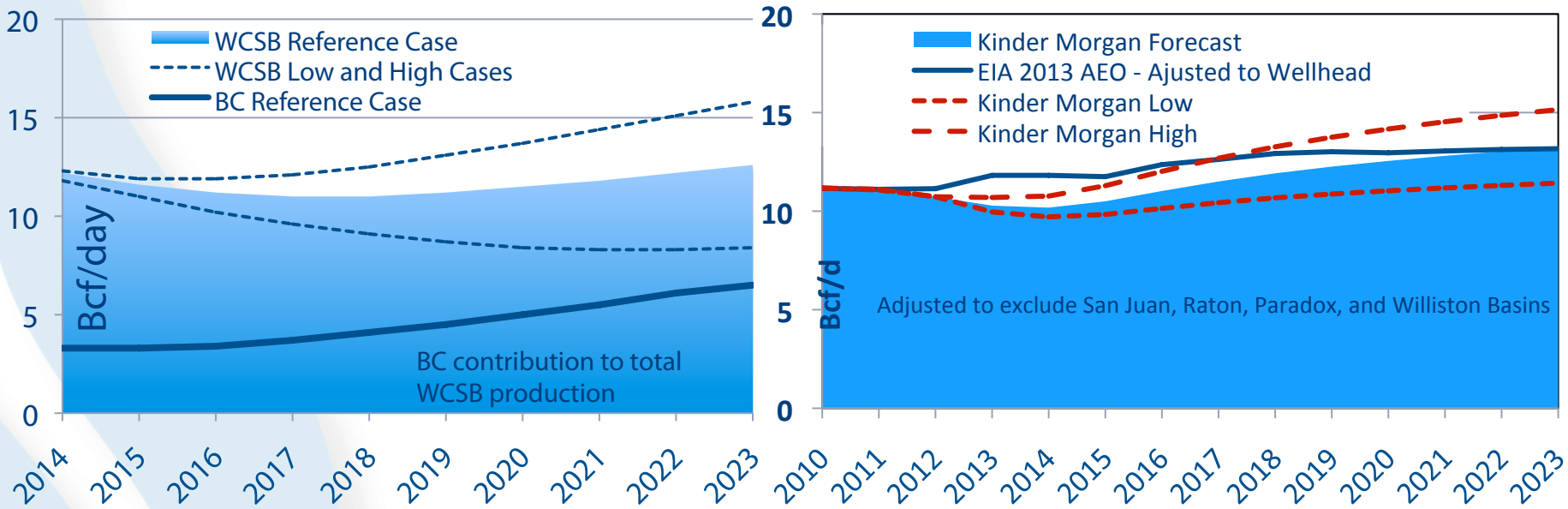
Rockies/WCSB Production Forecast



Source: NEB 2013 Canada's Energy Future

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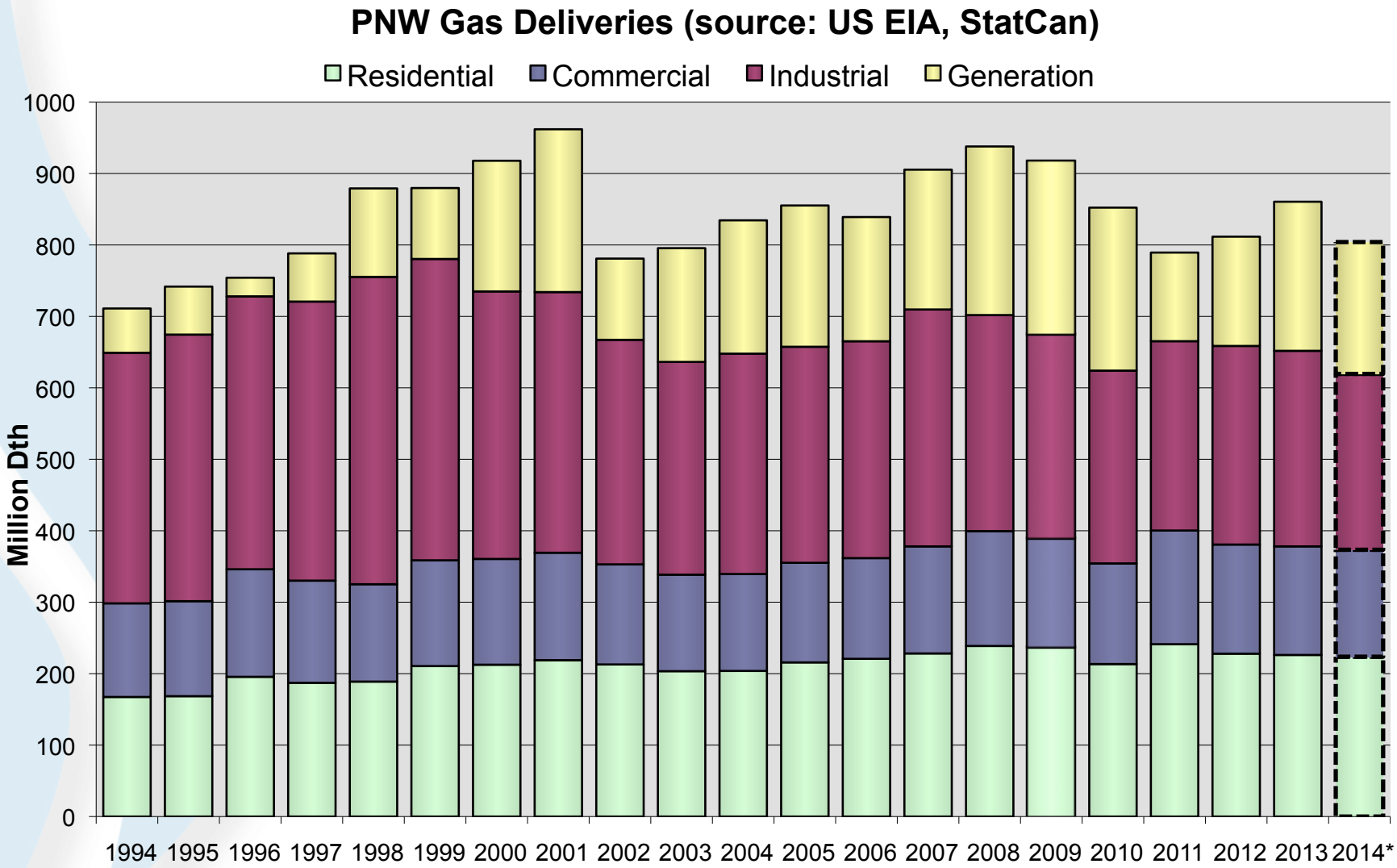
Recent Gas Demand



* 2014 Outlook Year 1 Forecast

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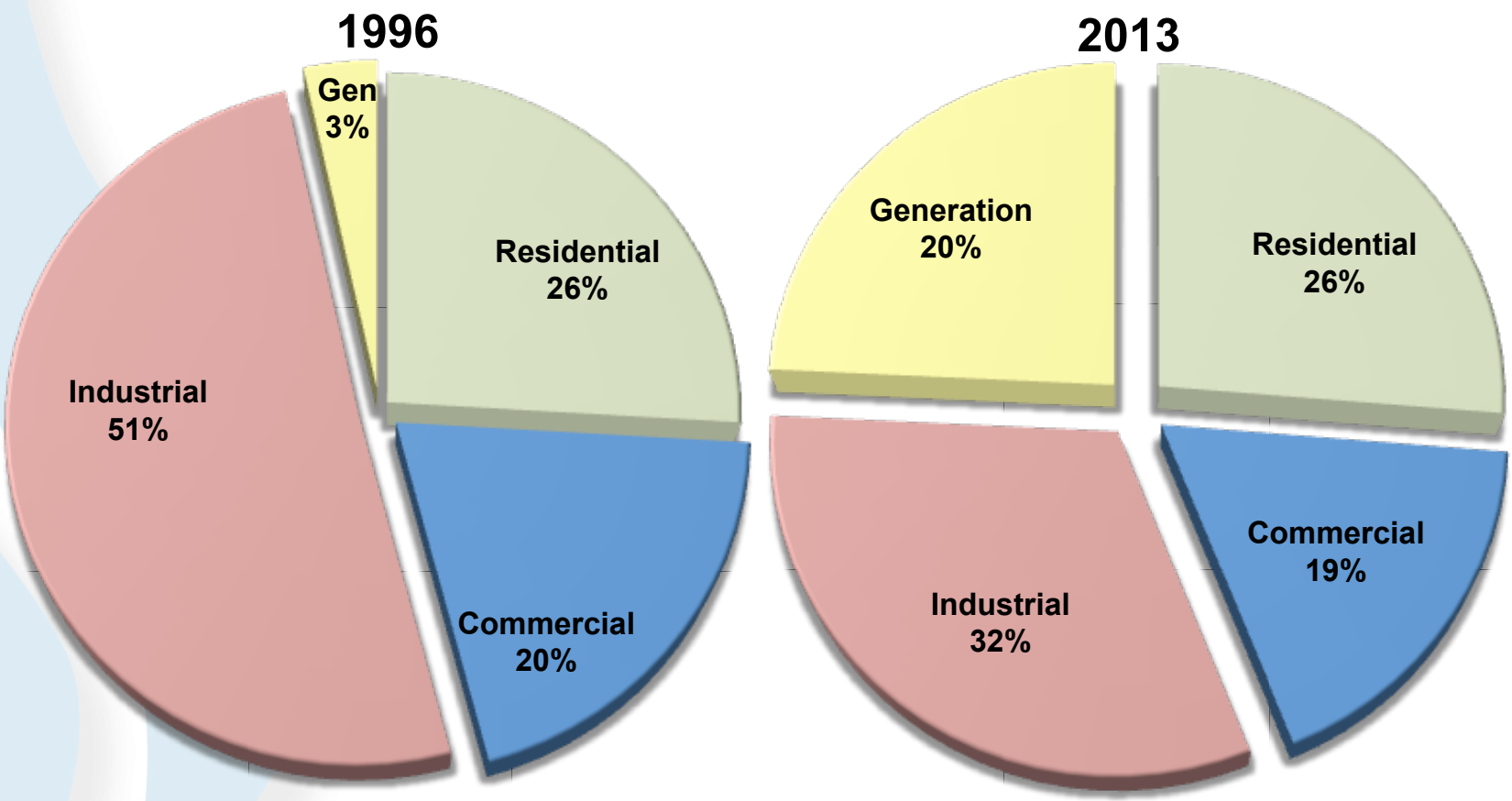
Change in Demand Composition



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Growth Rates by Sector

	Low		Expected		High	
	Annual Rate	Cumulative	Annual Rate	Cumulative	Annual Rate	Cumulative
TOTAL	**0.9%**	**8.7%**	**1.5%**	**14.2%**	**2.2%**	**21.7%**
Residential	0.7%	6.7%	0.9%	8.8%	1.1%	10.5%
Commercial	0.4%	3.9%	0.8%	7.6%	1.2%	10.9%
Industrial	0.7%	6.5%	0.9%	8.3%	1.0%	9.8%
Generation	1.9%	18.6%	3.3%	34.0%	5.0%	55.3%

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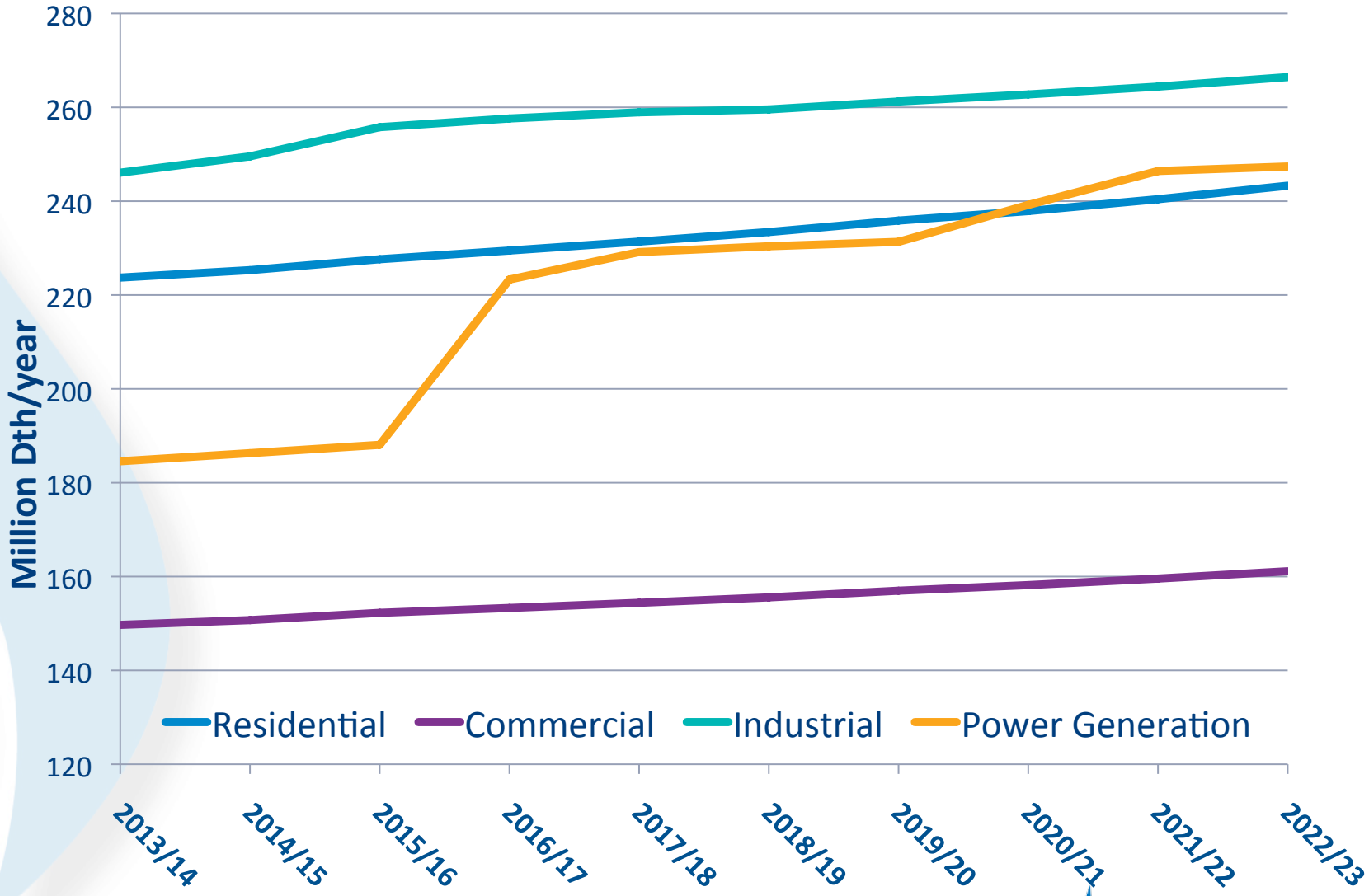
2014 Outlook Forecast



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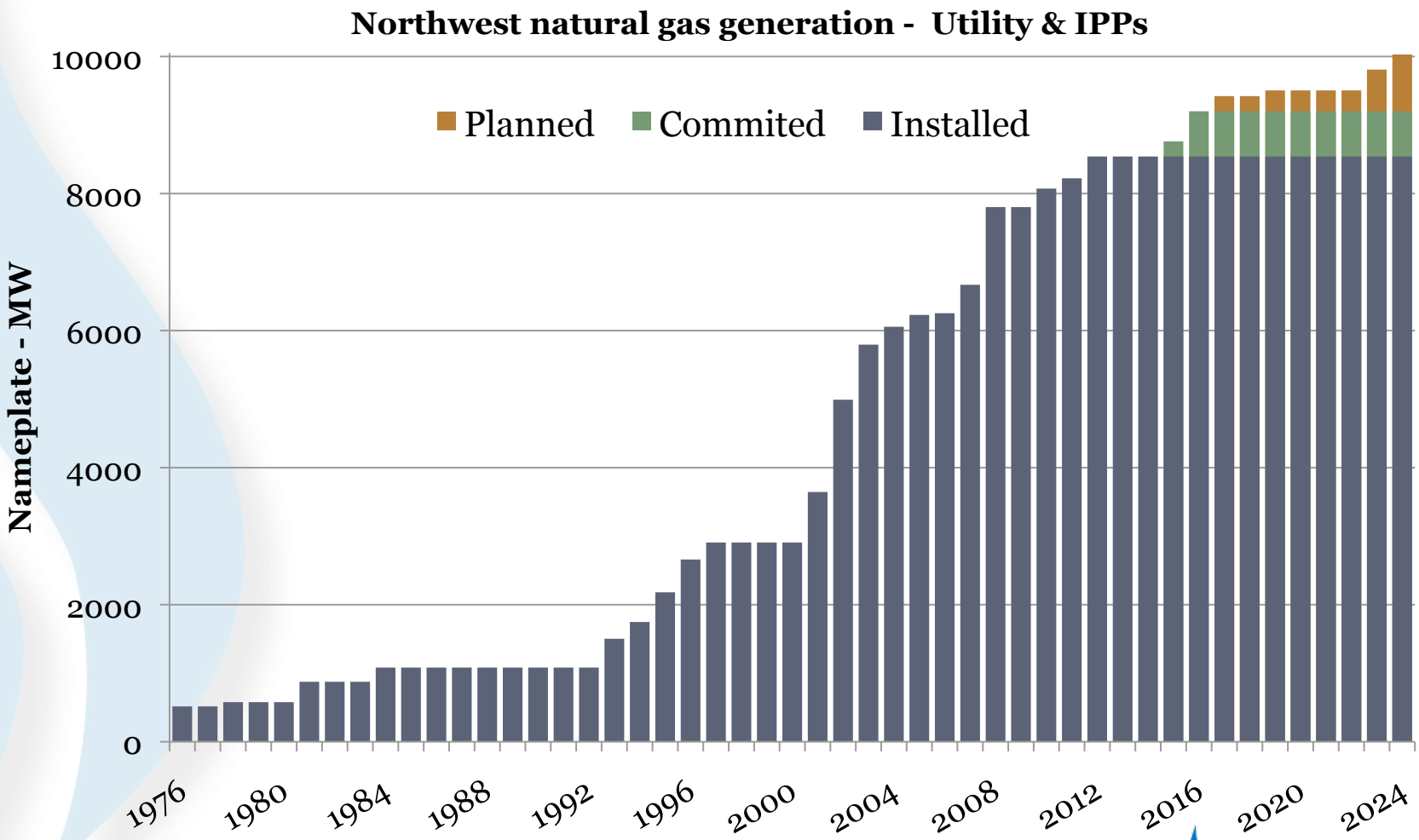
Natural Gas Could Hit 10,000 MW



Source: PNUCC 2014 Northwest Regional Forecast

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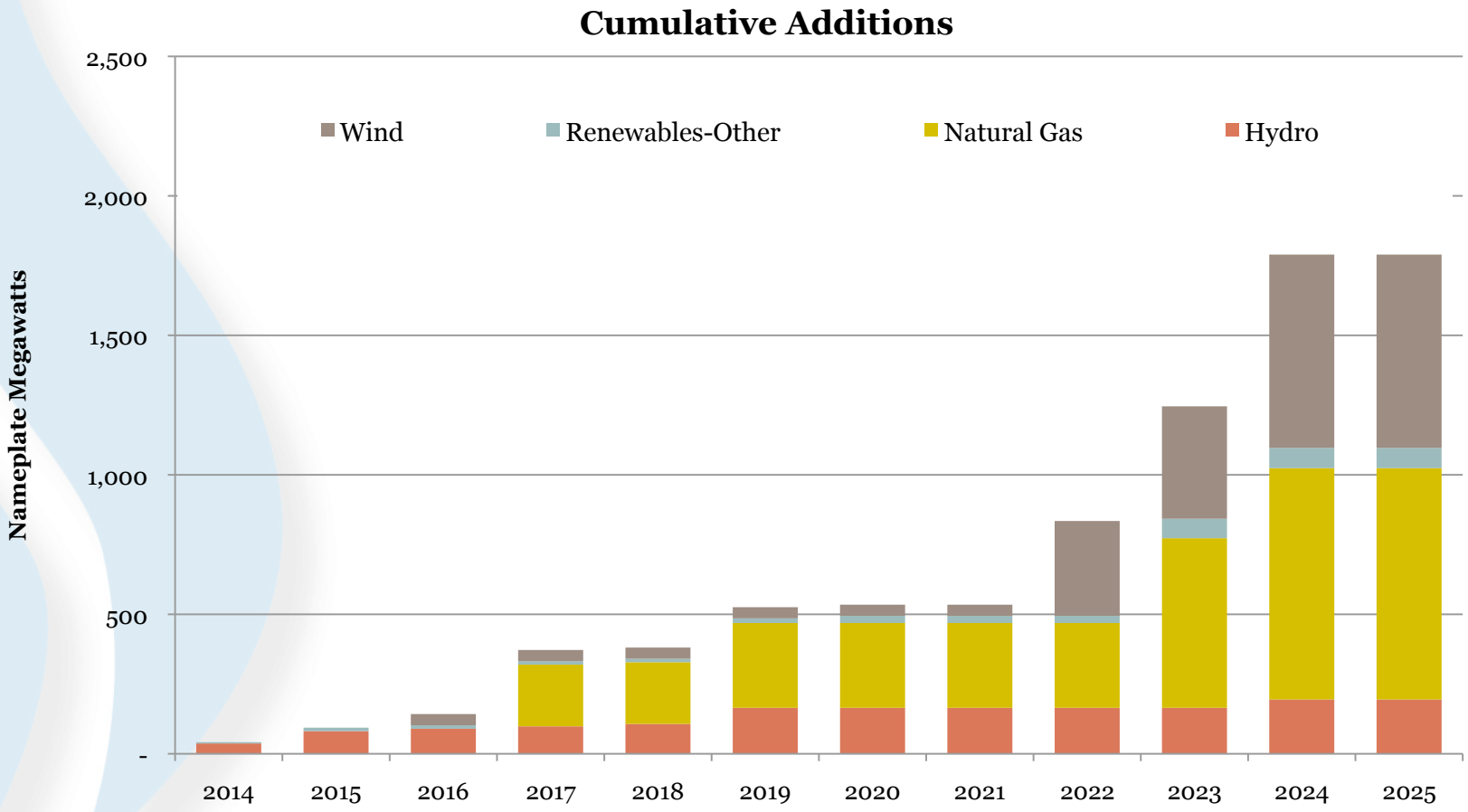
Planned Generating Resources (utilities)



Source: PNUCC 2014 Northwest Regional Forecast

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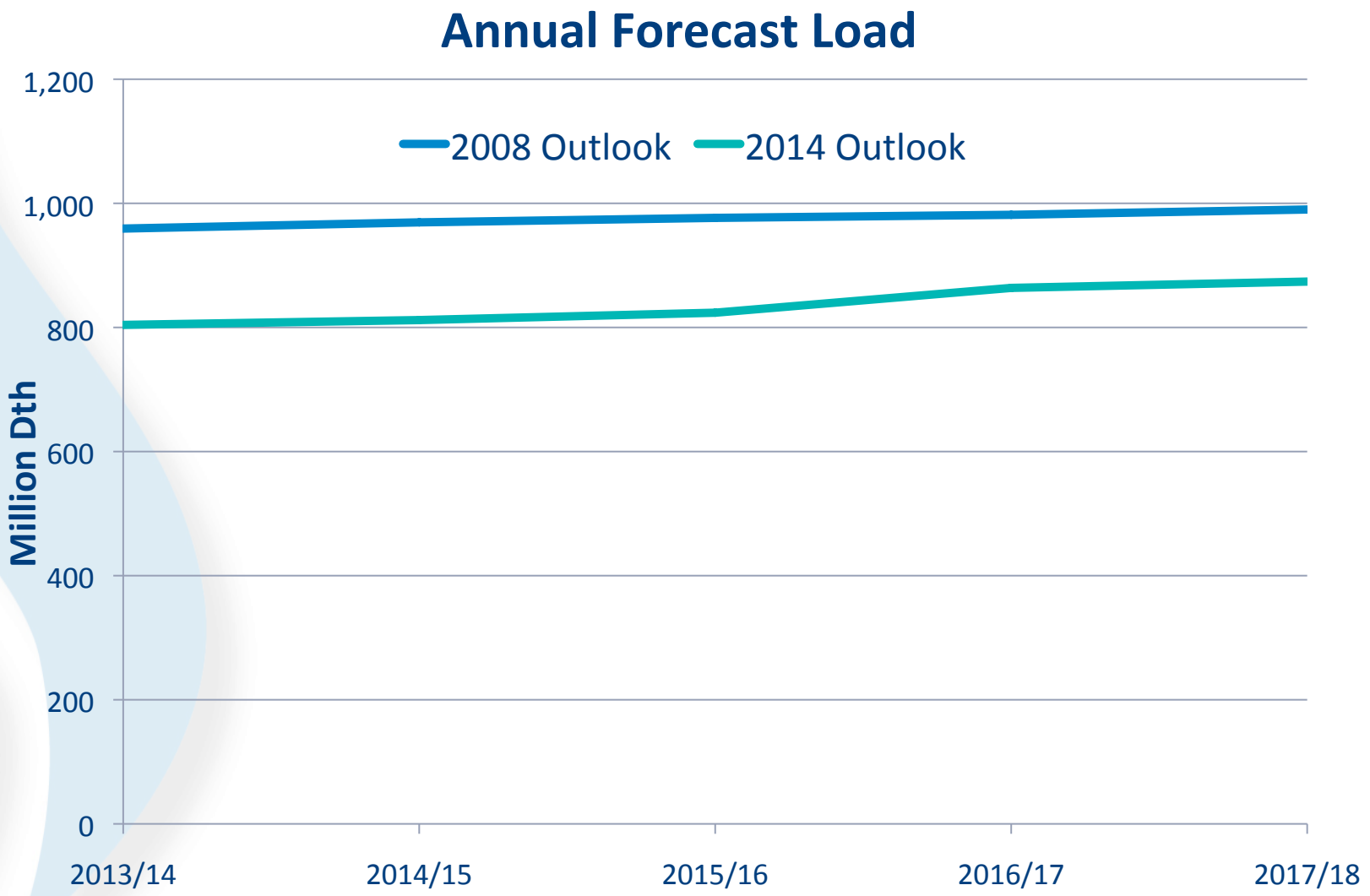
Pre-Recession Forecast Comparison



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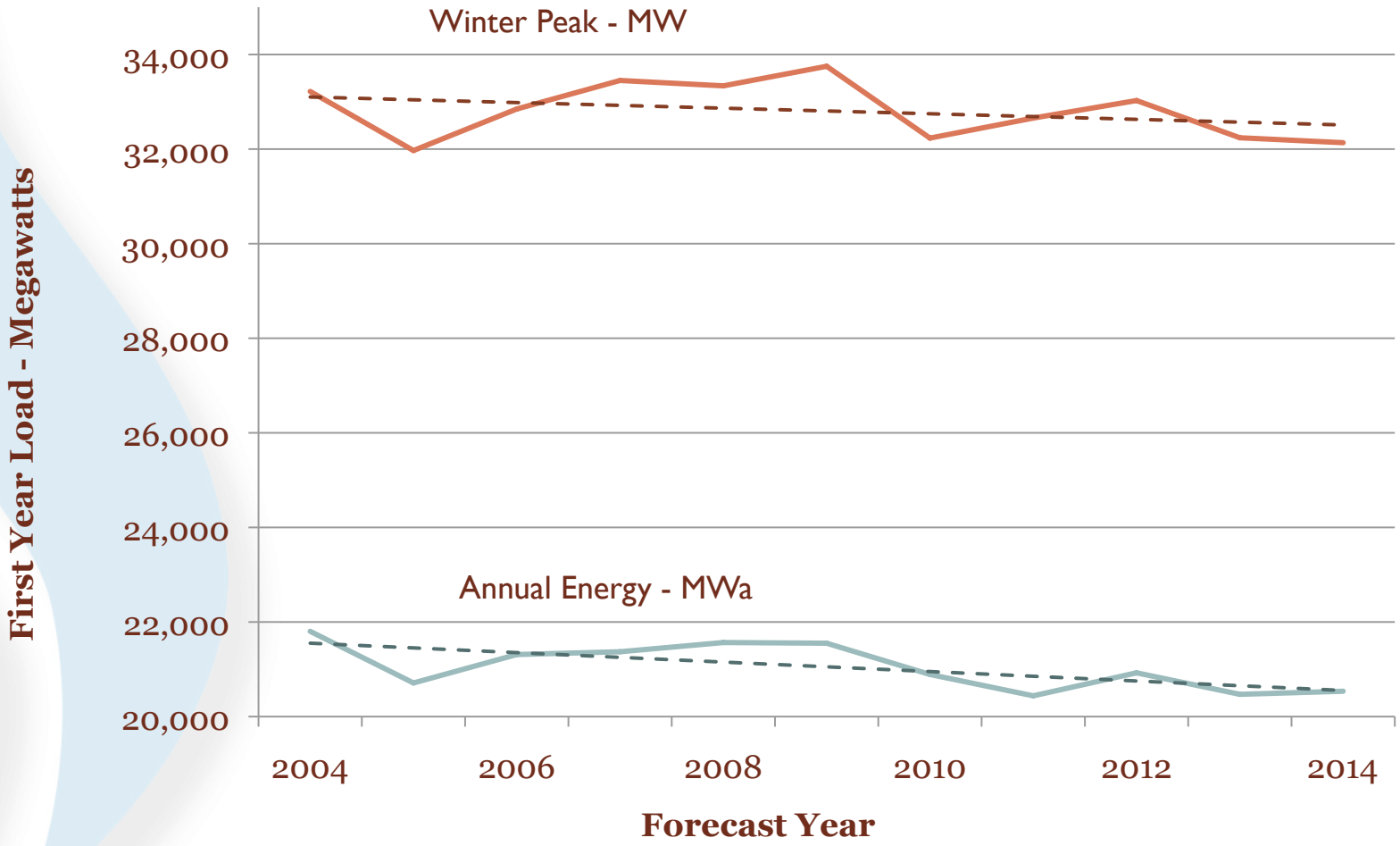
Load Forecasts Drift Down



Source: PNUCC 2014 Northwest Regional Forecast

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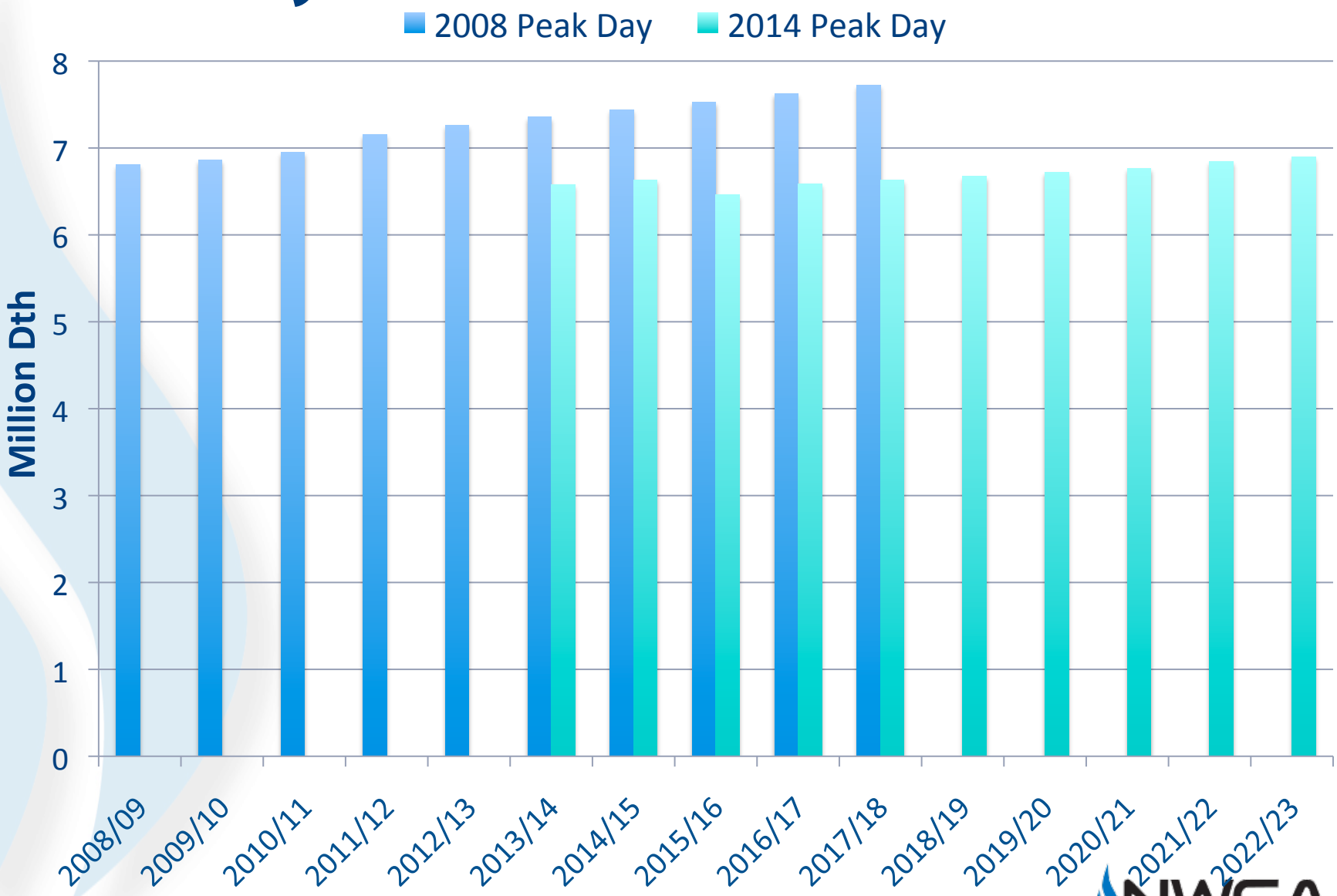
Peak Day



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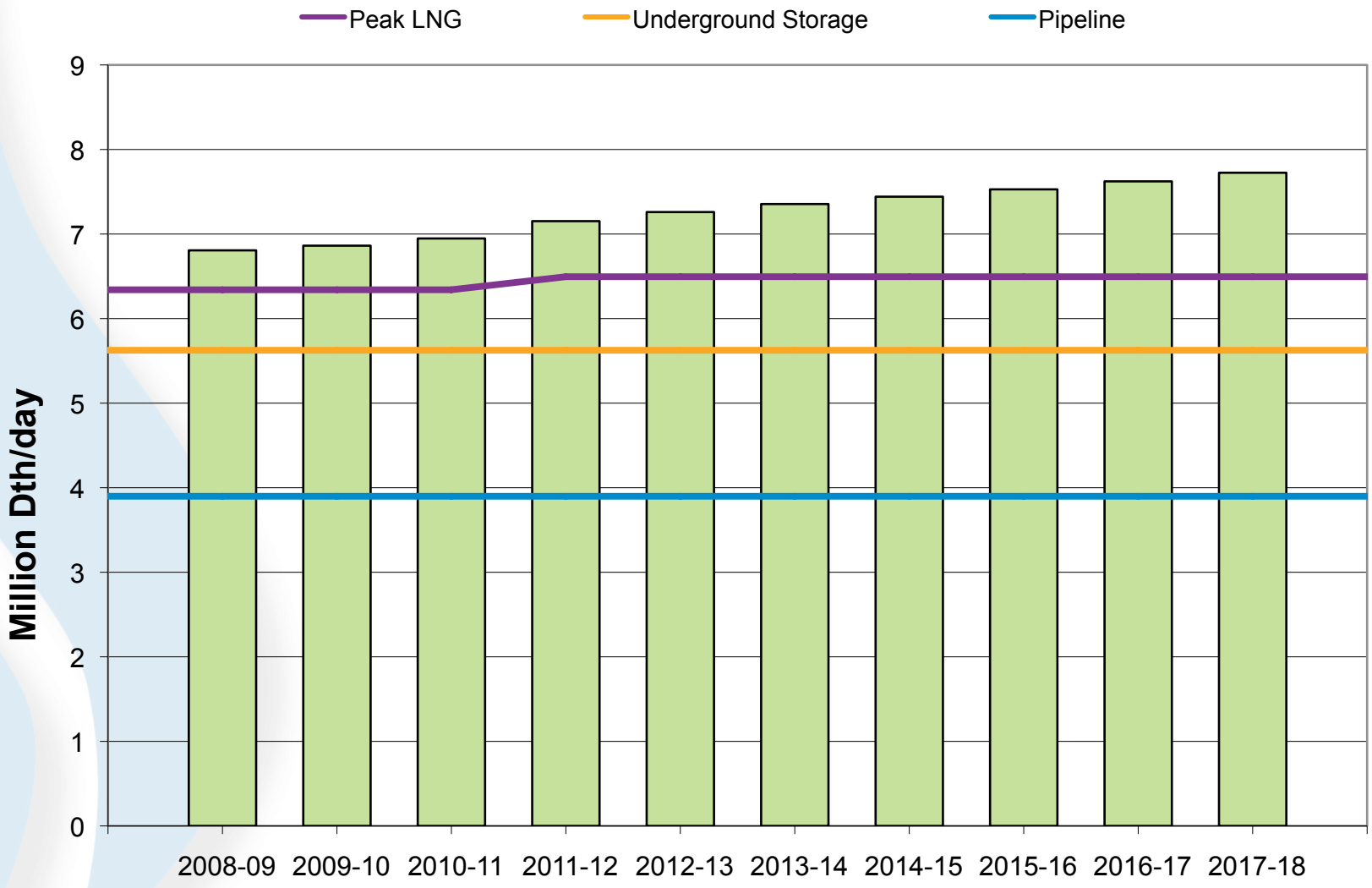
Pre-Recession Peak Day Balance



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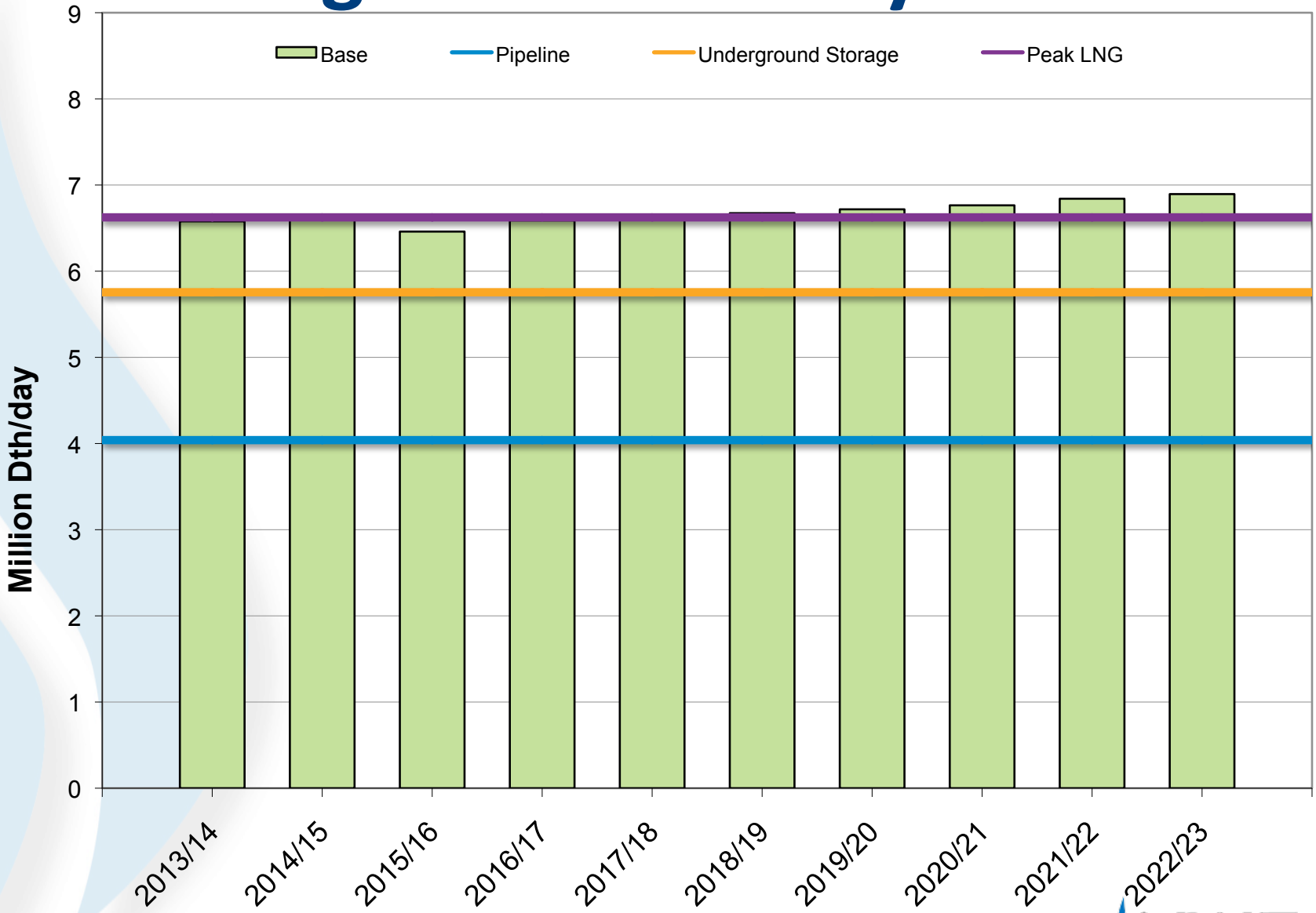
2014 Regional Peak Day Balance



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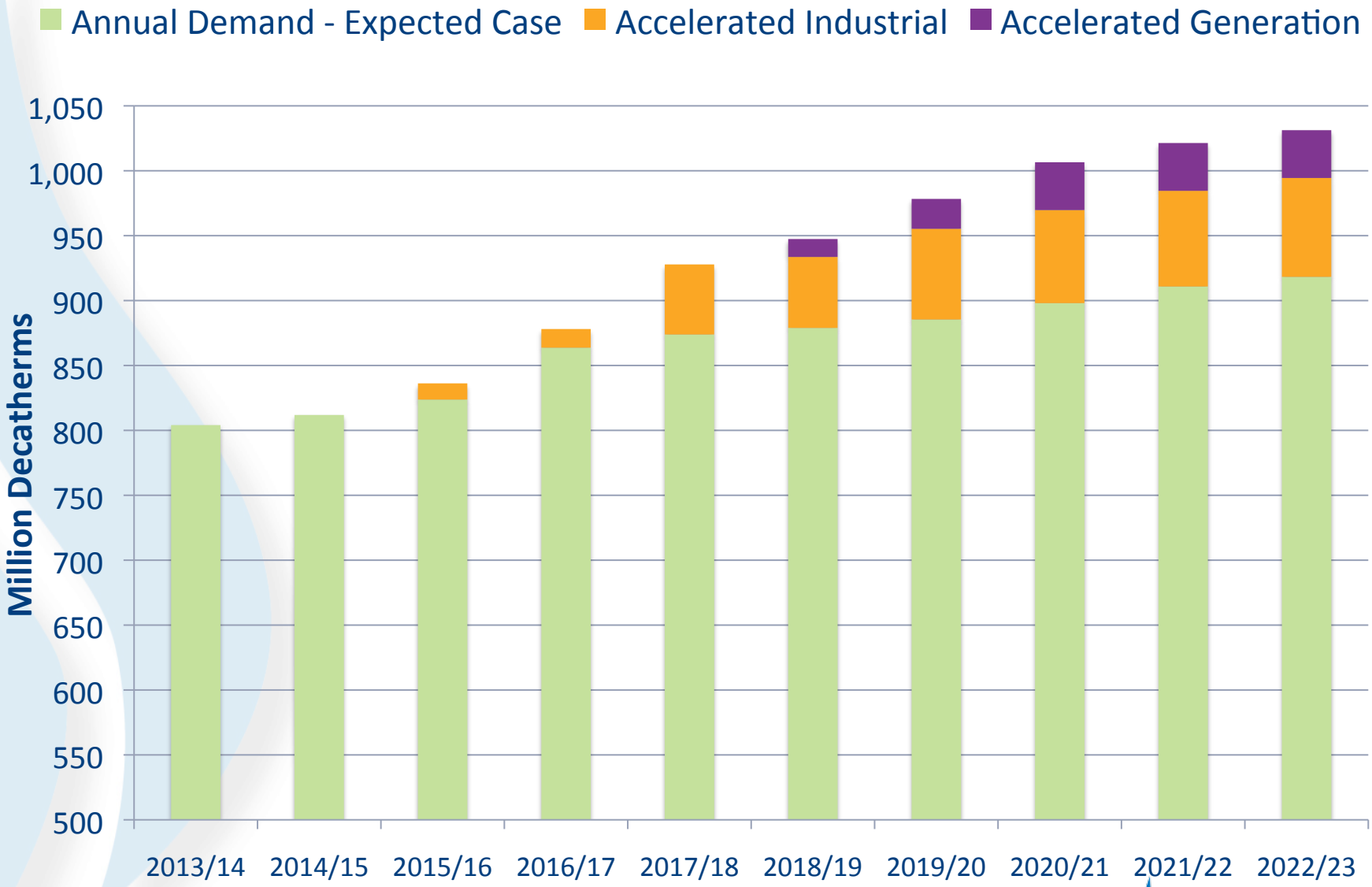
Accelerated Demand Scenarios



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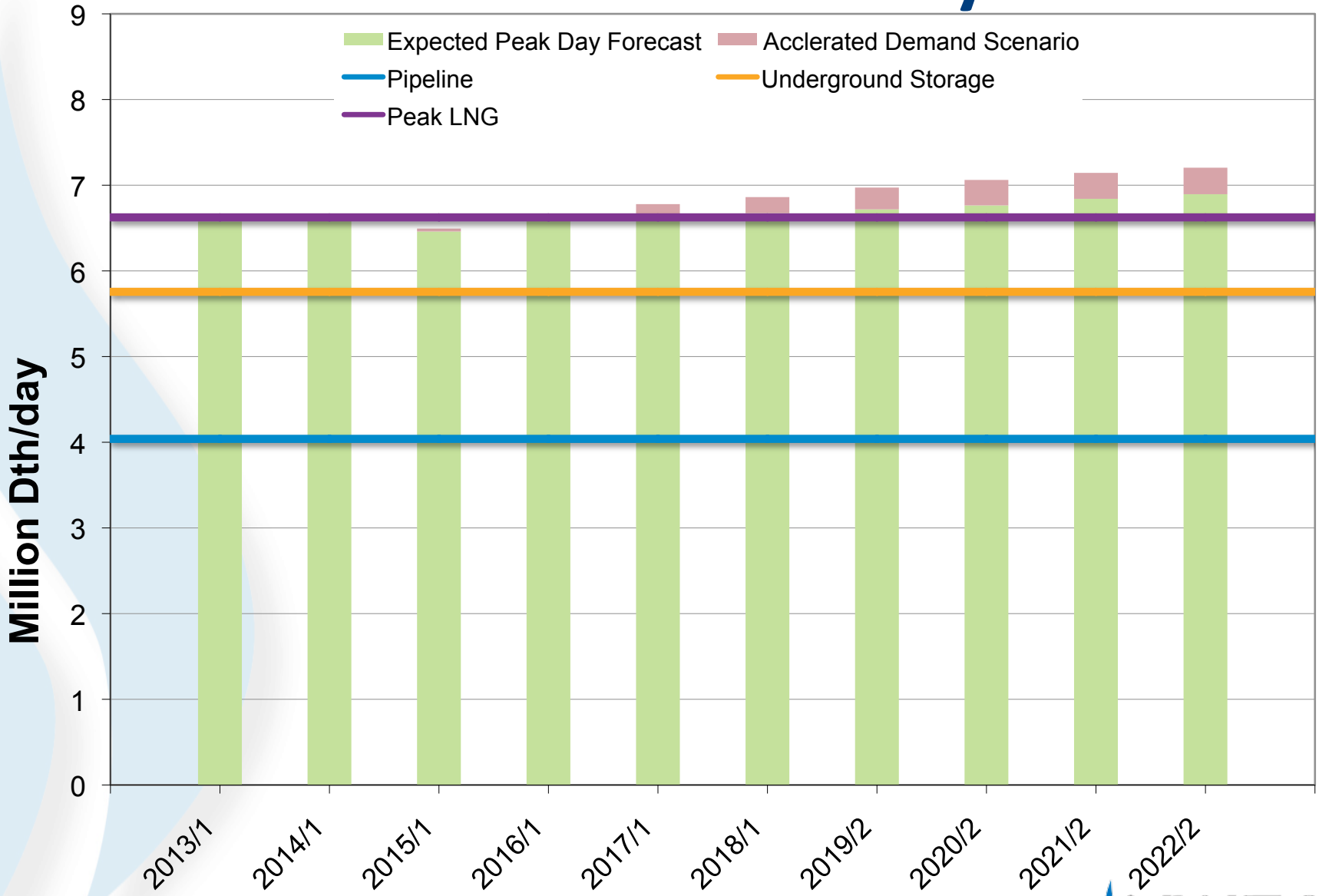
Accelerated Demand Peak Day Balance



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Capacity Projects

Pipelines

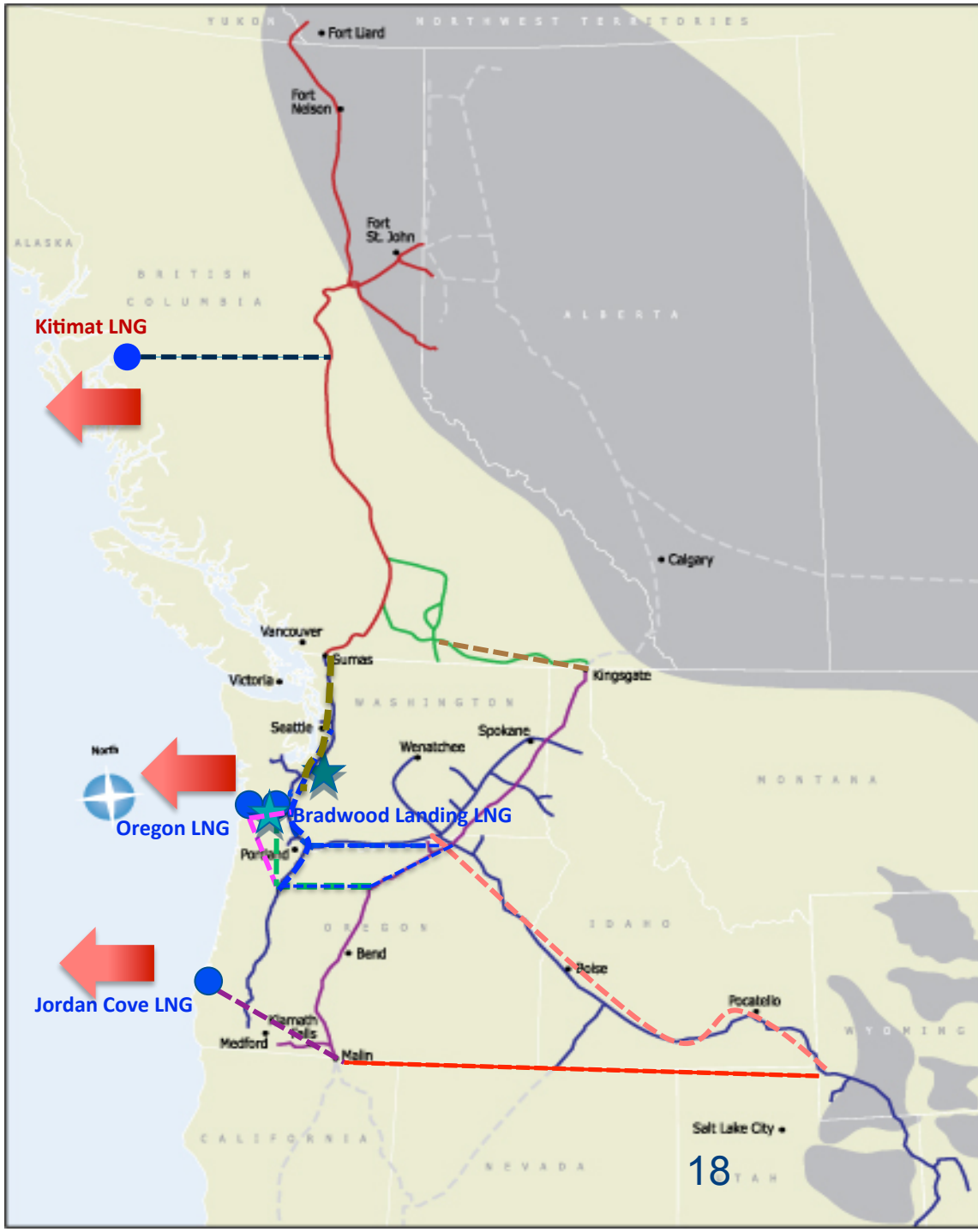
- Southern Crossing Expansion
- Palomar
- Sunstone
- Blue Bridge (N-MAX)
- Ruby
- Pacific Connector
- Pacific Trail
- Oregon LNG
- Washington Expansion

LNG Terminals

Kitimat LNG
Bradwood Landing
Oregon LNG
Jordan Cove LNG

Storage Facilities

Mist
Jackson Prairie



Questions?

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