

2025 IEPR Forecast Overview

Demand Analysis Working Group

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2025 IEPR Forecast Scope

- Routine annual updates
- No major methodology updates will be implemented
- Focus on scenarios
 - BTM PV and storage
 - AAFS
 - AATE
 - Data centers
 - Explore incorporation of IOU Known Load data into the Local Reliability Scenario



Uncertainties

- Building electrification
 - South Coast AQMD rejects amendments that would reduce NOx emissions from gas-fired furnaces and water heaters
 - CARB concept for ZEAS goes to board hearing after 2025
- Transportation electrification
 - ACF and ACC II
 - Elimination of federal clean vehicle incentives
- BTM PV and storage tax credits
 - Expire at end of year – will they come back in the future?
- Tariffs
 - Impacts on econ/demo
 - BTM PV and storage adoption forecast is based on payback period
 - NREL Annual Technology Baseline will include tariff impacts, but will not be available until fall which is too late to incorporate into the forecast



Scenarios

- More scenarios for load modifiers will be produced
 - Decide which combination to use in the Planning Forecast and Local Reliability Scenario in the fall
- Proposed scenario designs to be discussed today and at the August 26th [IEPR workshop](#)
 - AAEE
 - AAFS
 - AATE
 - BTM PV and storage



Key Dates

Milestone	Date
DAWG Meeting – Forecast Inputs and Assumptions	July 16
IEPR Workshop – Forecast Inputs and Assumptions	Aug 6
DAWG Meeting – Load Modifier Inputs and Assumptions	Today
IEPR Workshop – Load Modifier Inputs and Assumptions	Aug 26
DAWG Meeting – Load Modifier Draft Results	week of Oct 27
IEPR Workshop – Load Modifier Draft Results	Nov 13
DAWG Meeting – Draft Annual and Hourly Forecasts	week of Nov 17
IEPR Workshop – Overall Forecast Results	Dec 11
Forecast Adoption at CEC Business Meeting	mid-Jan 2026



Audience Participation

- Today's DAWG is a hybrid meeting
- Approach to Q&A
 - Open to in-person questions first
 - Please come up to the mic and introduce yourself to online participants
 - Two Options for Zoom participants
 - Type questions into the Q&A box
 - Use 'Raise Hand' feature to ask question