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July 8, 2025

MEMORANDUM

TO: Council Members

FROM: Jennifer Light, Director of Power Planning

SUBJECT: PNUCC Northwest Regional Forecast

BACKGROUND:

Presenters: Crystal Ball, Executive Director, and Aliza Seelig, Analytics and Policy Director, PNUCC; Gillian Charles, Red Kite Consulting

Summary: The Pacific Northwest Utilities Conference Committee (PNUCC) released its annual update to the Northwest Regional Forecast (NRF). This report is a summation of the regional utilities' forecasted loads and planned resources over the next ten years. Because the NRF is updated annually, it provides insights into power system trends. The 2025 NRF continues to show load growth consistent with the 2024 NRF outlook. The forecast also shows significant plans for new resources. The PNUCC team will walk through the findings and key messages from this year's NRF.

Relevance: PNUCC's NRF provides a forecast of loads and resource supply based on regional utilities' plans. This provides a view into the region's load/resource balance.

Background: PNUCC has developed the following key takeaways for this year's forecast:

- Regional utilities are feeling mounting pressure to add resources
- Meeting the region's energy needs has become an urgent concern, requiring immediate attention

- Load growth and needed future resources projections are consistent with last year's outlook
- Resource additions are at risk of not being deployed
- Threats to reliability are increasing
- Natural gas and electric systems are increasingly interdependent, necessitating enhanced coordination and planning to mitigate reliability risks
- Regional collaboration is essential for serving the needs of customers and Northwest communities

More info: The full report is available on PNUCC's website at: <https://www.pnucc.org/wp-content/uploads/2025-PNUCC-Northwest-Regional-Forecast-final.pdf>.



Northwest Regional Forecast of Power Loads and Resources

Regional Utility Perspective

Northwest Power & Conservation Council | July 16, 2025

Crystal Ball, Aliza Seelig and Gillian Charles

Northwest Regional Forecast: Sum of regional utility plans



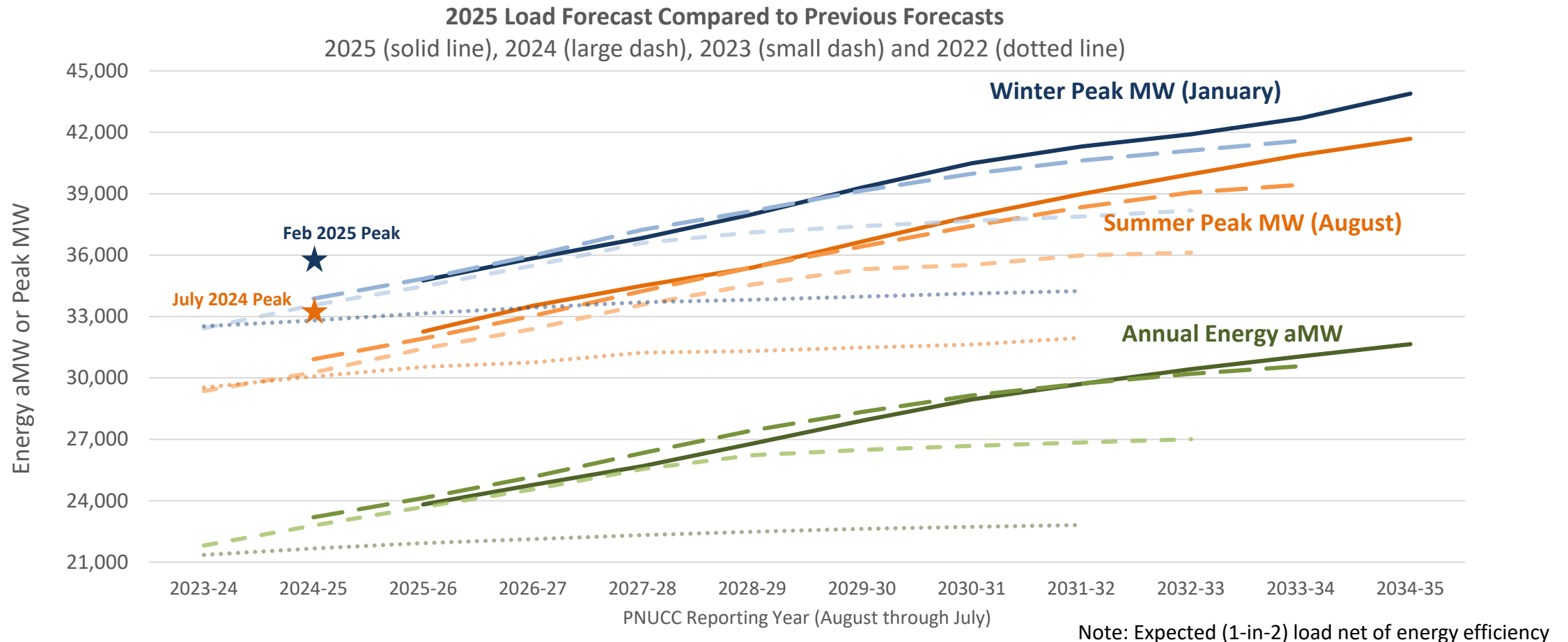
- Annual update on the evolving state of the Northwest power system
- Information provided by utilities and the Bonneville Power Administration
- Tracks trends using consistent assumptions for annual energy, winter and summer peak
- Power Act footprint (WA, OR, ID, western MT)

Key takeaways

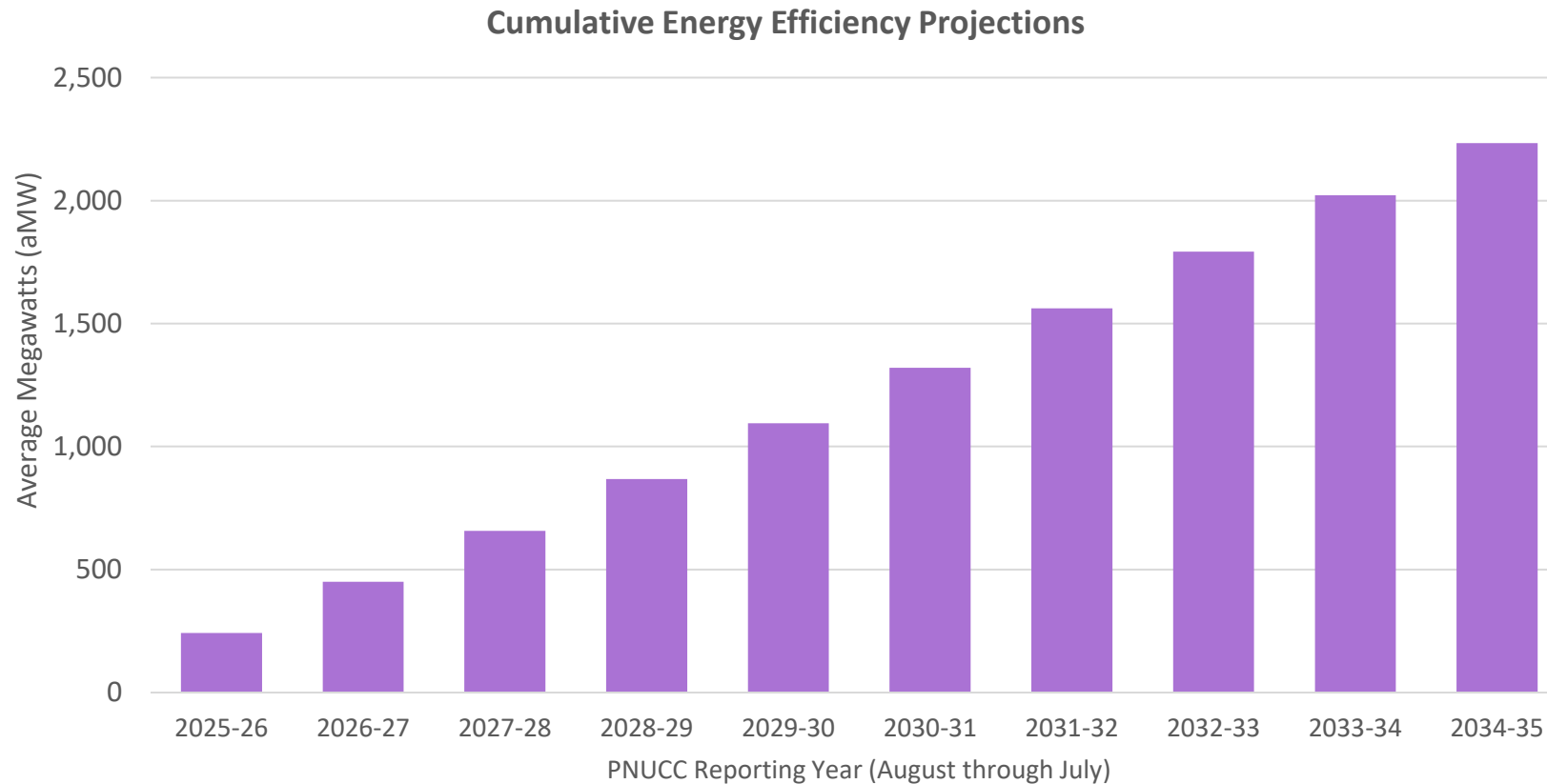
Navigating Uncertainty: The Power of Regional Collaboration

- Load growth and needed future resources projections are consistent with last year's outlook
- Regional utilities are feeling uncertainty and mounting pressure to add generating resources
- Resource additions are at risk of not being deployed, thus threats to reliability are increasing
- Natural gas and electric systems are increasingly interdependent, so they need to be carefully coordinated to mitigate reliability risks
- Regional collaboration is essential for serving the needs of customers and Northwest communities

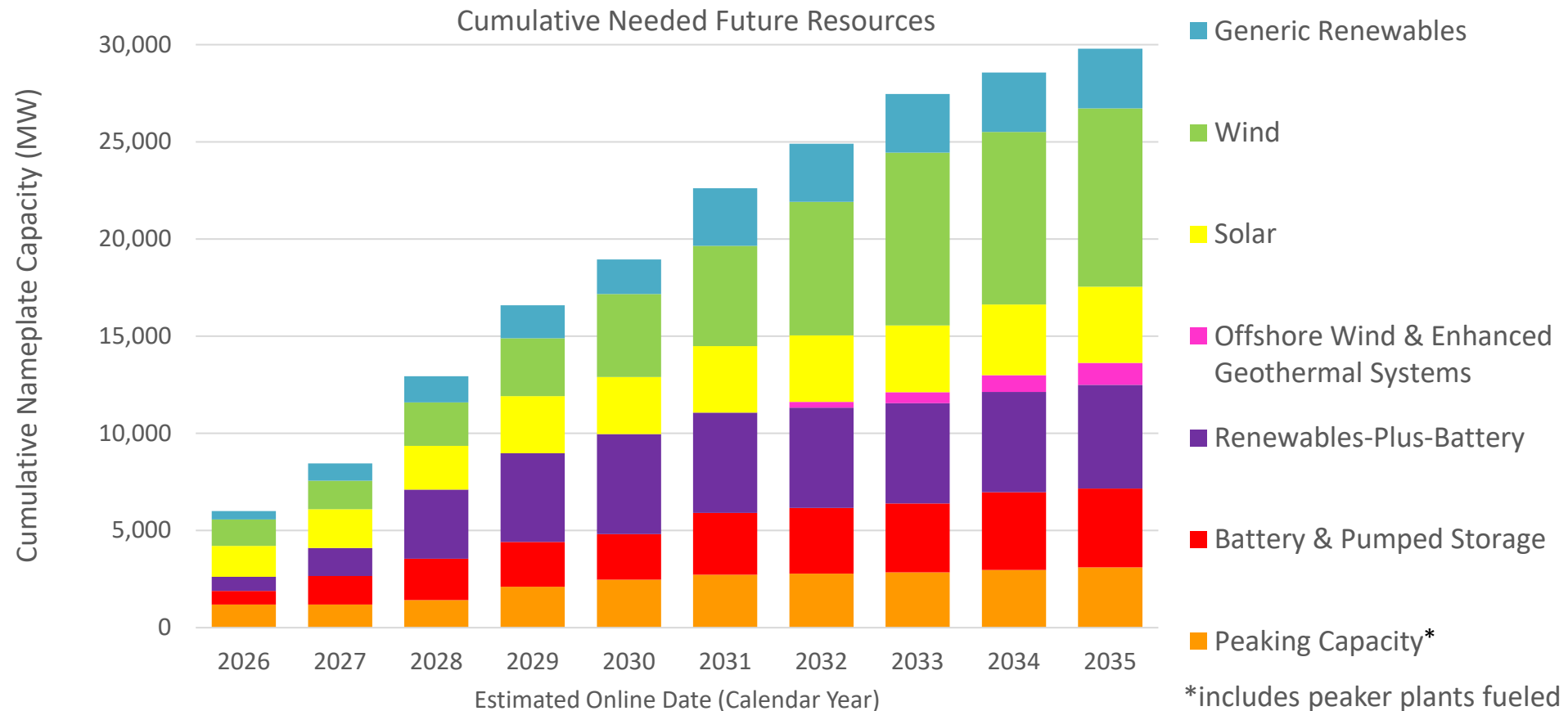
Load forecast compared to previous forecasts



Energy efficiency remains critical component of an adequate power supply

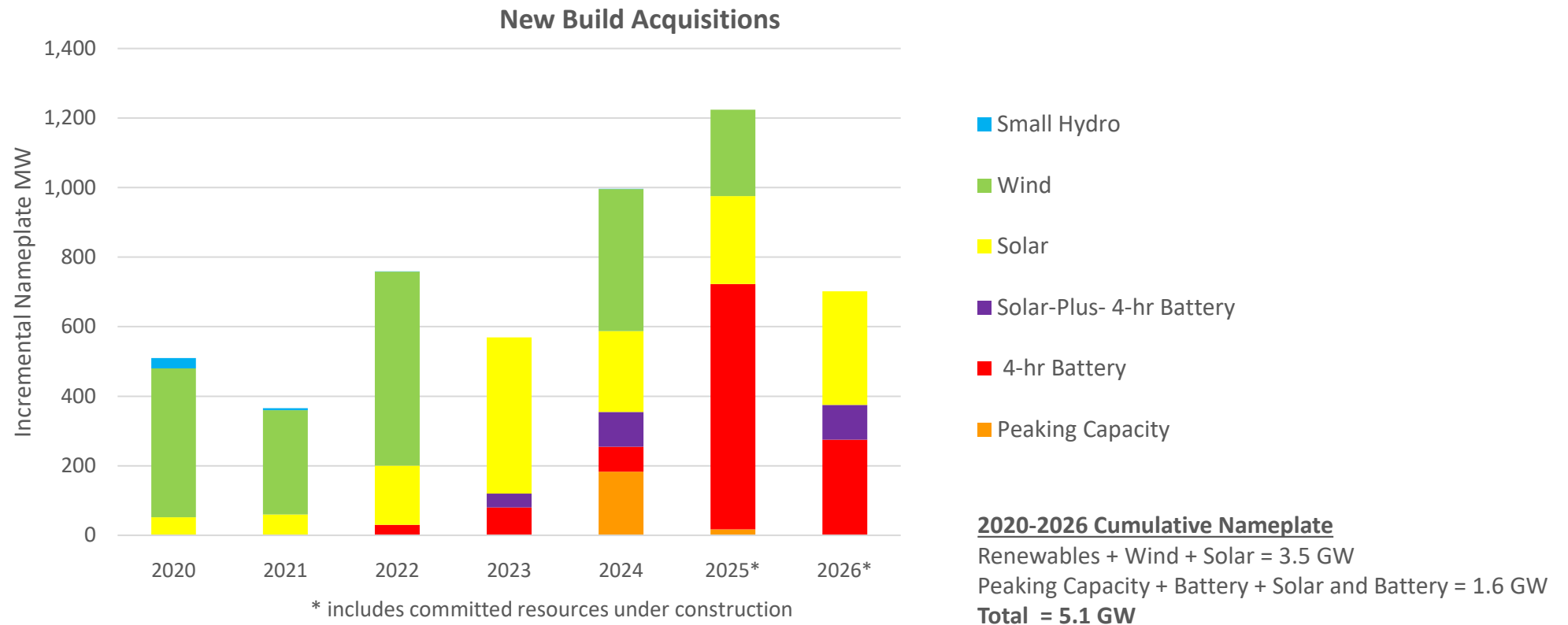


Ambitious resource acquisition plans

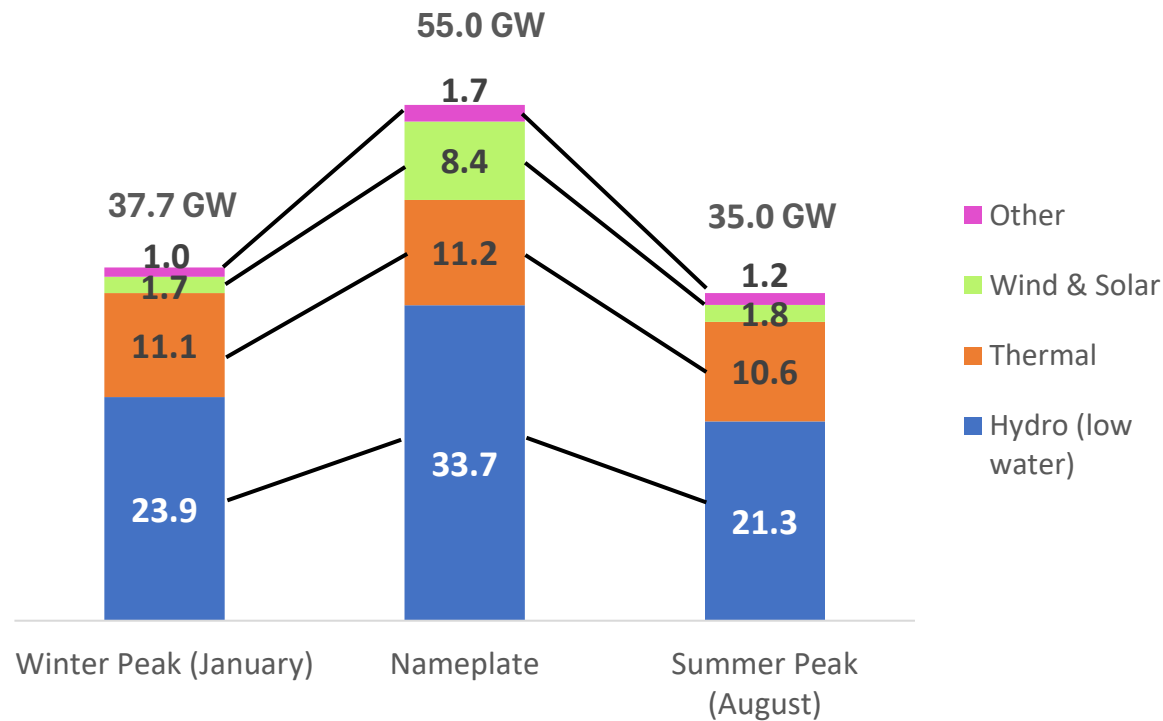


*includes peaker plants fueled by natural gas, biodiesel and generic capacity

An evolving mix of long-term acquisitions



Capacity contributions of Northwest utility generating resources in 2026



Aggregated utility reported data for peak hour generation and nameplate capacity

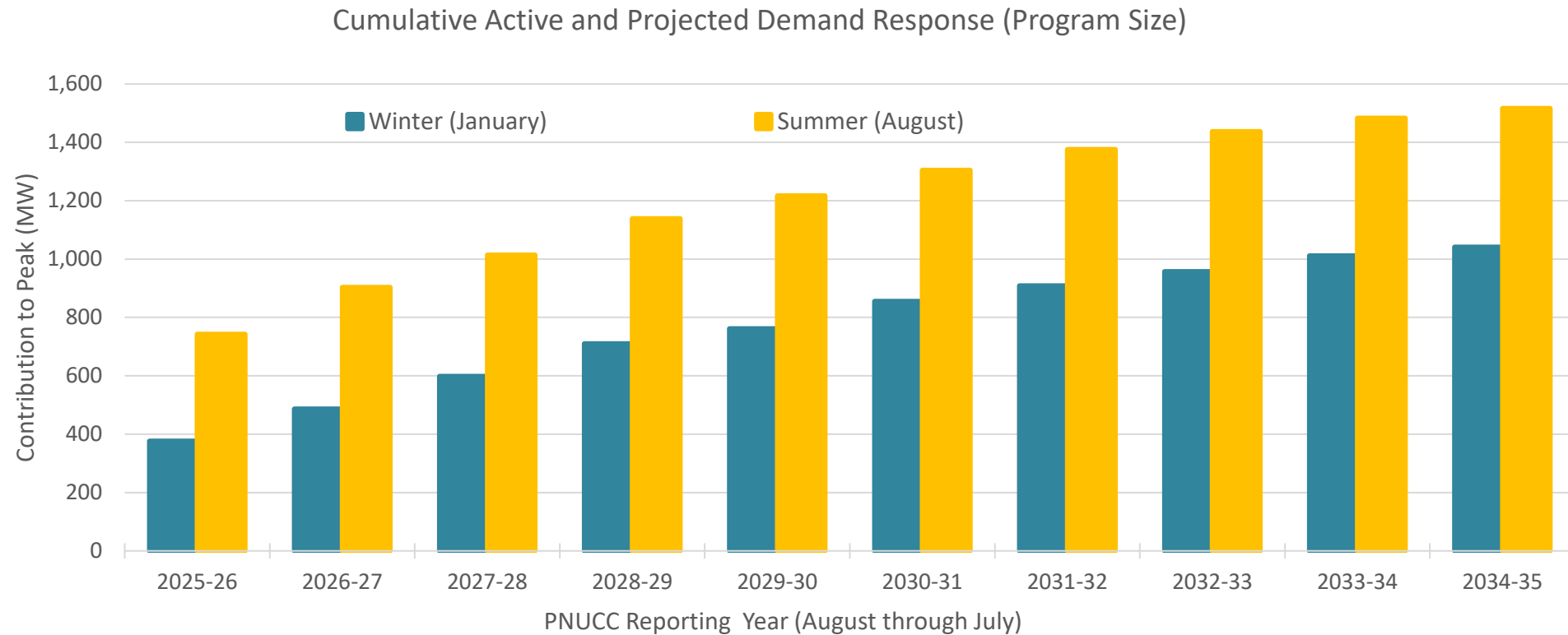
Hydro and thermal resources provide significant contributions to peak hour needs compared to wind and solar

Not included in this picture demand response and imports into the region

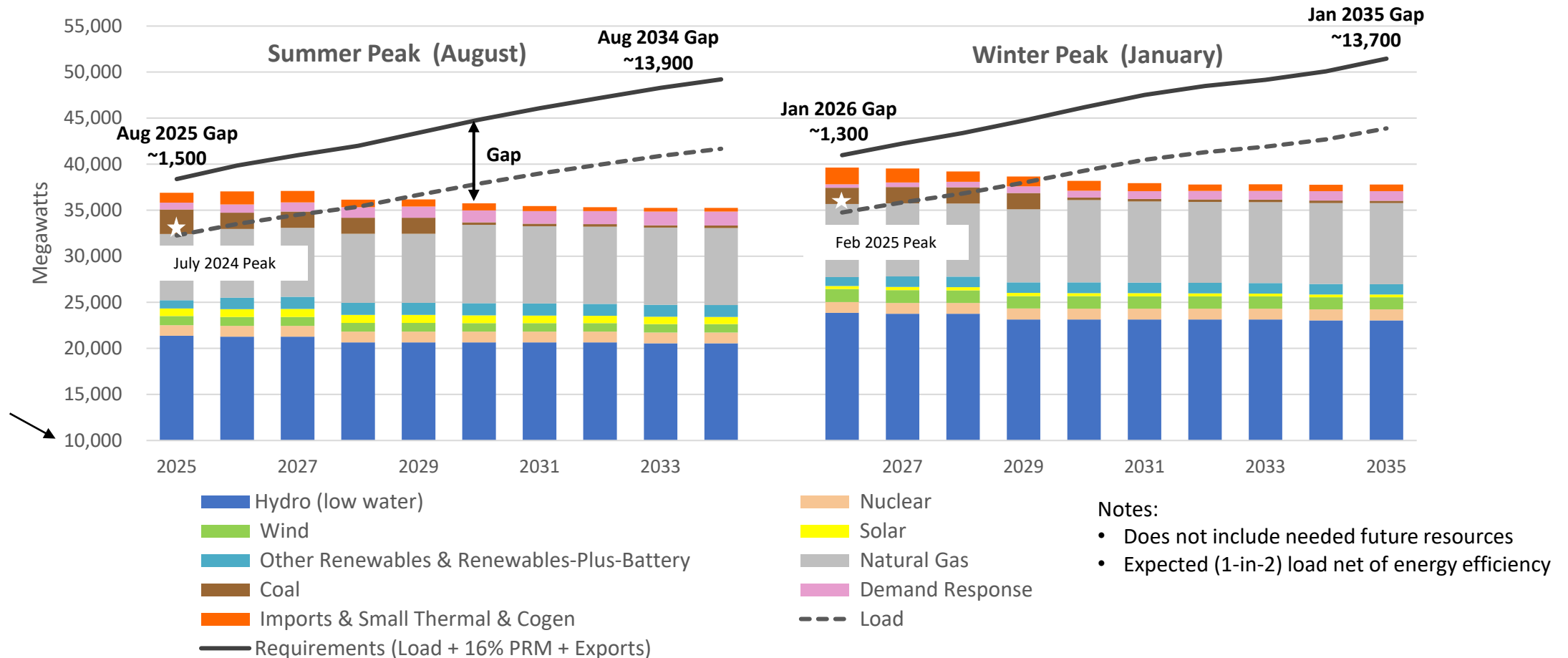
Thermal includes coal, cogeneration, natural gas, nuclear and small thermal

Other includes batteries, batteries paired with renewables, and other renewables like geothermal, biomass and land fill gas

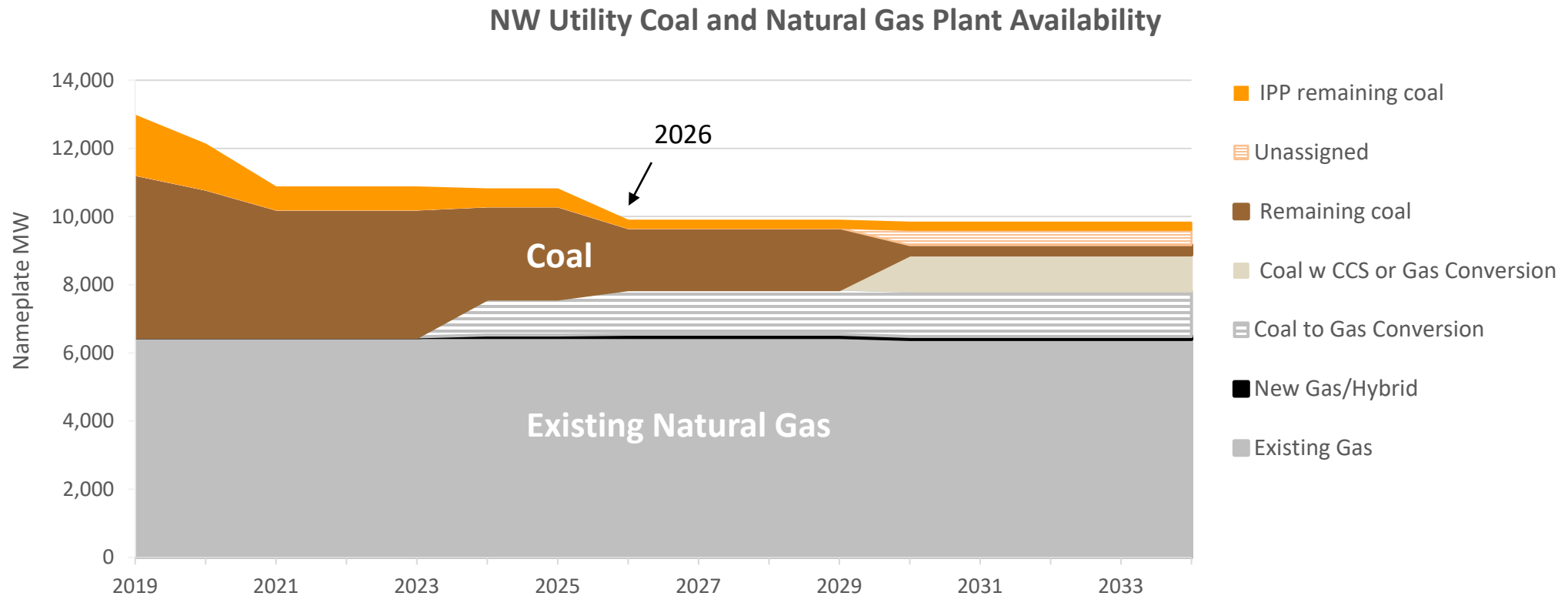
Demand response growing



Similar forecasted resource gaps in winter and summer peak hours



Natural gas expected to provide dependable capacity





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

Thank you!

Crystal Ball
Executive Director

Aliza Seelig
Analytics and Policy Director

Gillian Charles
Red Kite Consulting, LLC