

# 2024 Pacific Northwest Gas Market Outlook

Dan Kirschner, Executive Director  
Northwest Gas Association



**NWGA Members:**

- Avista Utilities
- Cascade Natural Gas Corp.
- FortisBC Energy
- Intermountain Gas Co.
- NW Natural
- Puget Sound Energy
- Enbridge BC Pipeline
- TC Energy GTN System
- Williams NW Pipeline

**NWGA Associate Members:**

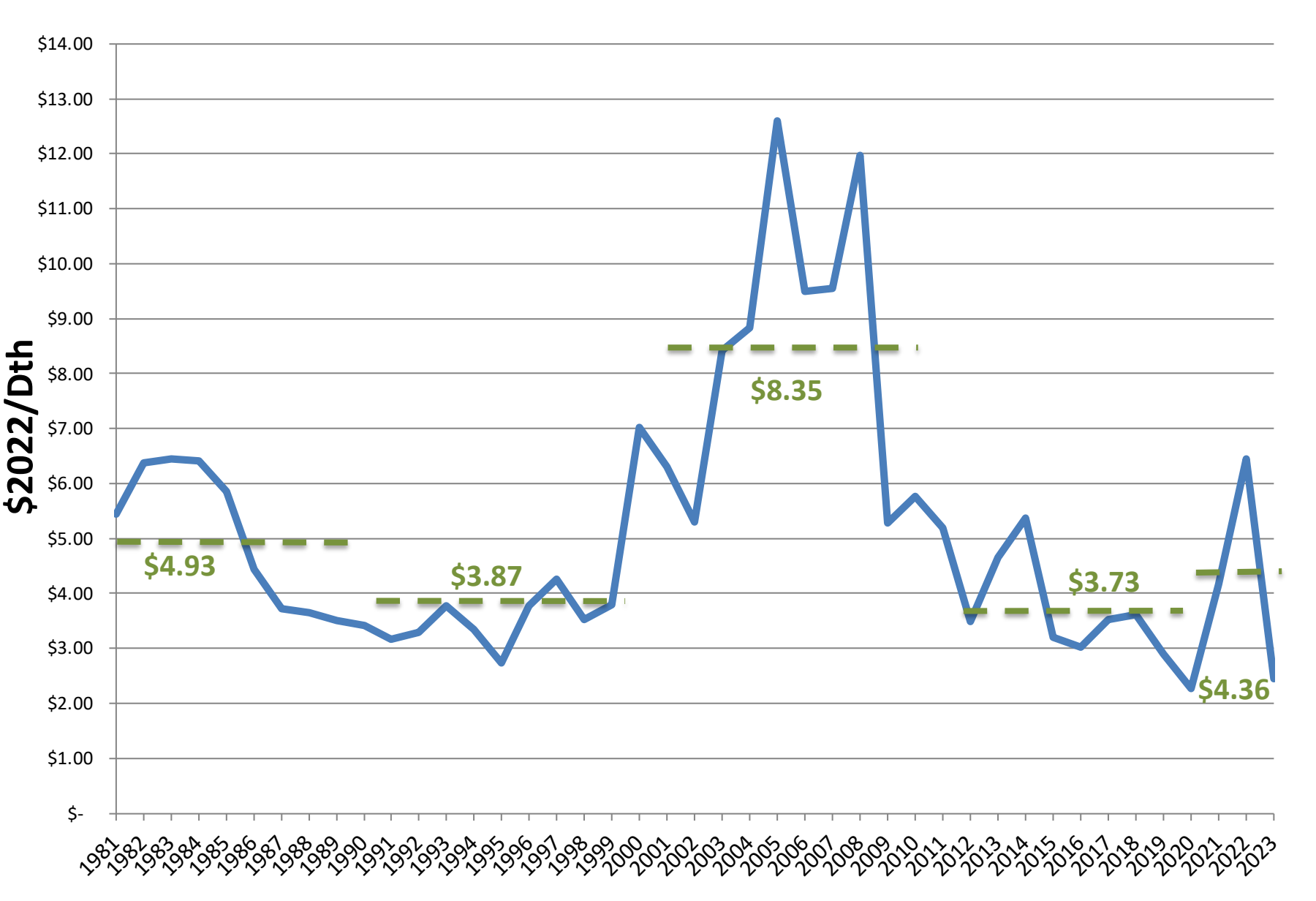
- Spire Midstream
- Tallgrass Energy
- Tenaska Marketing Ventures
- CMS Energy Advisors
- Pine Creek RNG
- Idaho Power



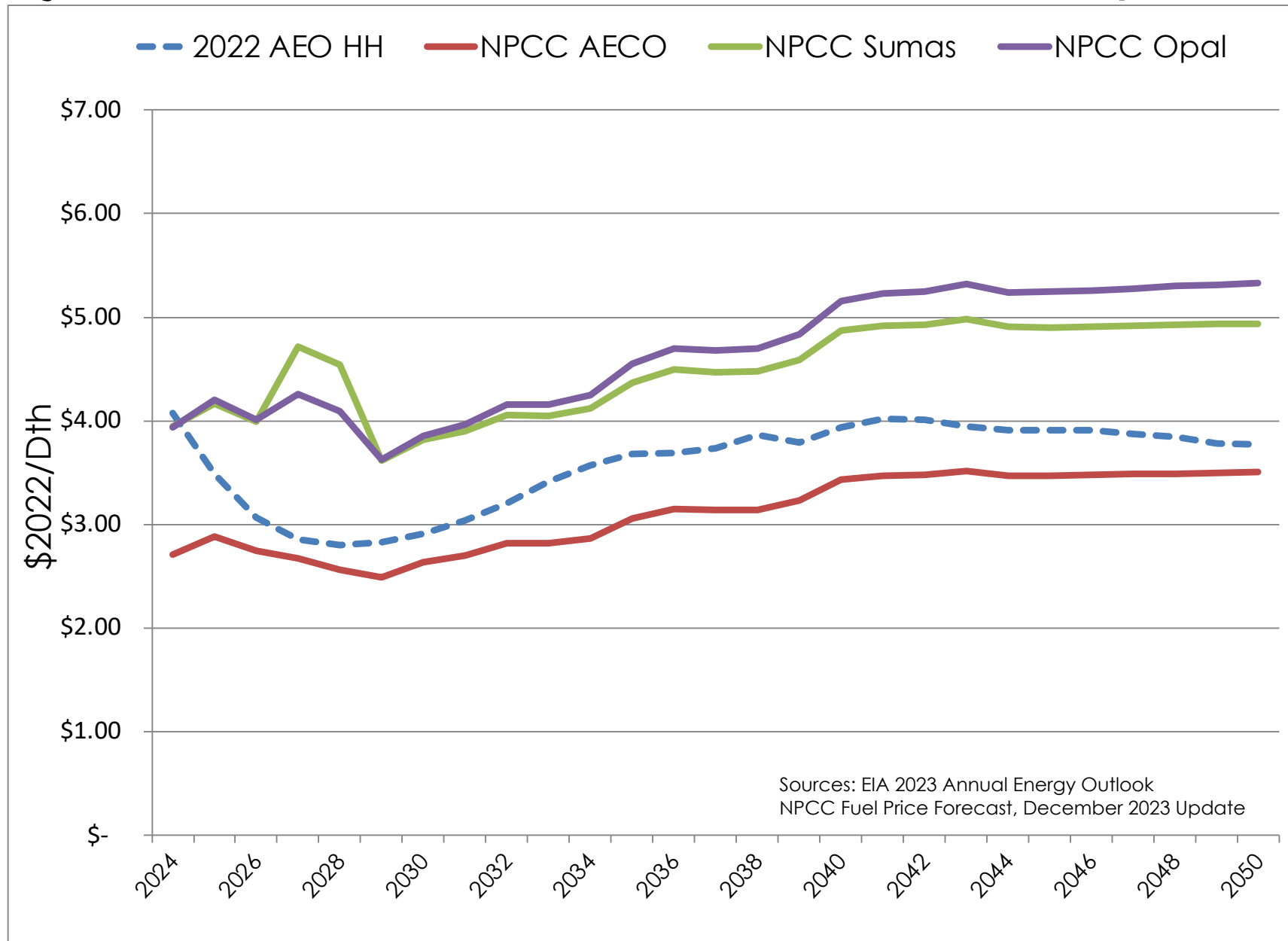
# NWGA By the Numbers

State/Province	Households / Businesses	Pipeline (miles / km)
British Columbia	976,170 / 99,404	35,500 / 57,250
Idaho	458,930 / 45,495	17,000 / 27,500
Oregon	803,747 / 86,355	30,000 / 48,500
Washington	1,266,989 / 110,902	44,500 / 71,750
TOTAL	3,505,836 / 342,156	127,000 / 205,000

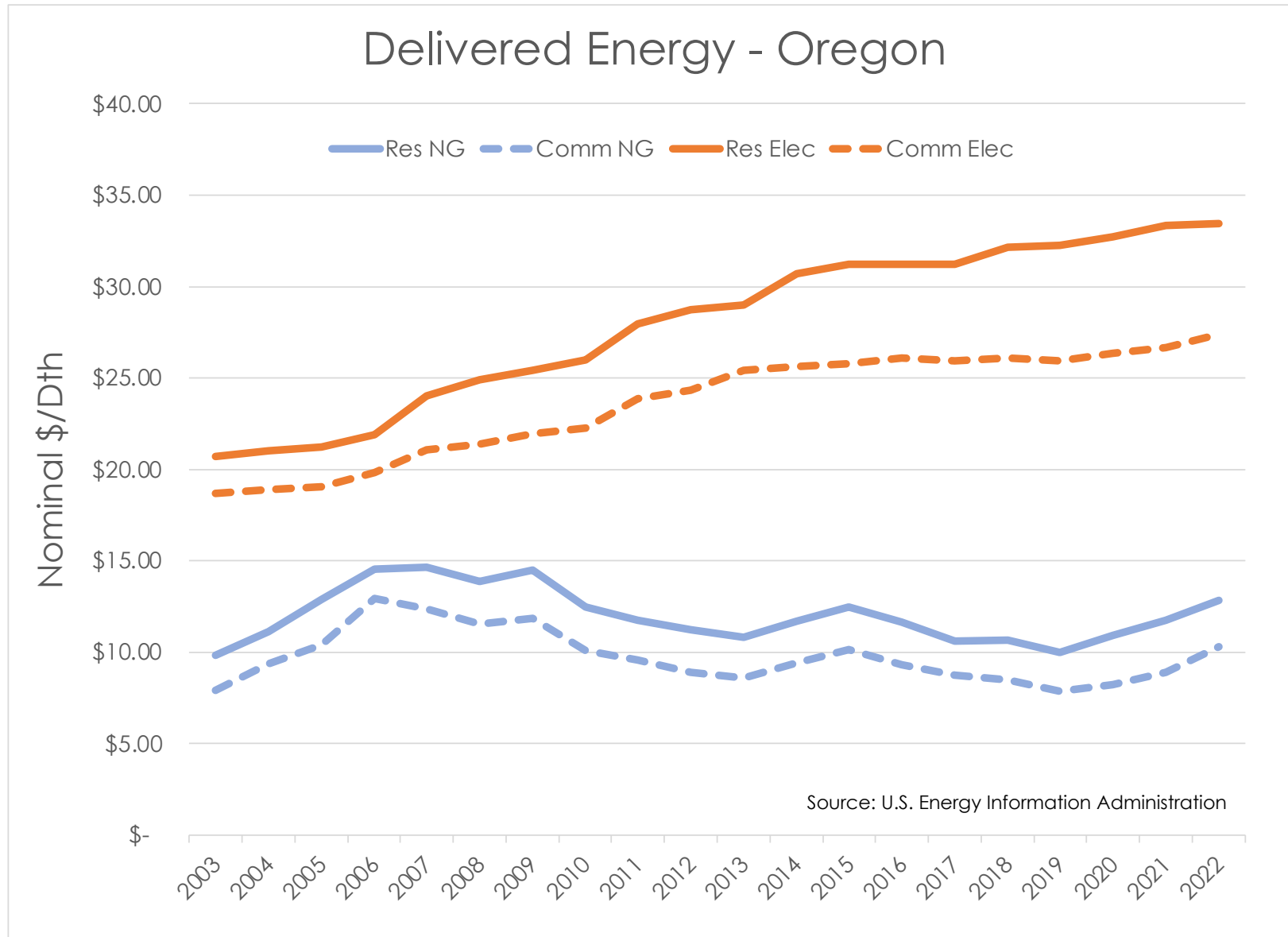
# Historic Commodity Price



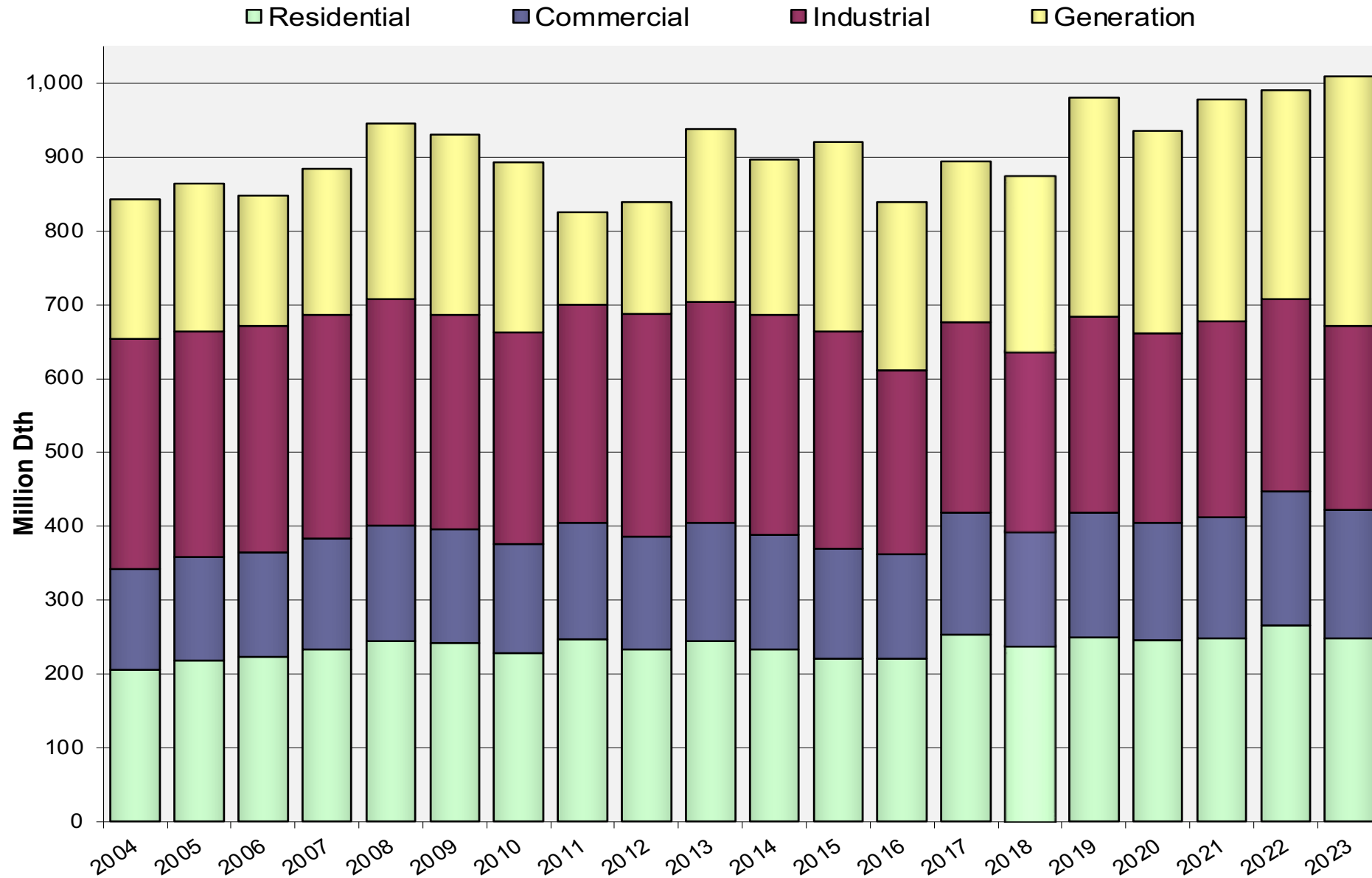
# Projected Natural Gas Commodity Price



# Delivered Energy Cost Comparison

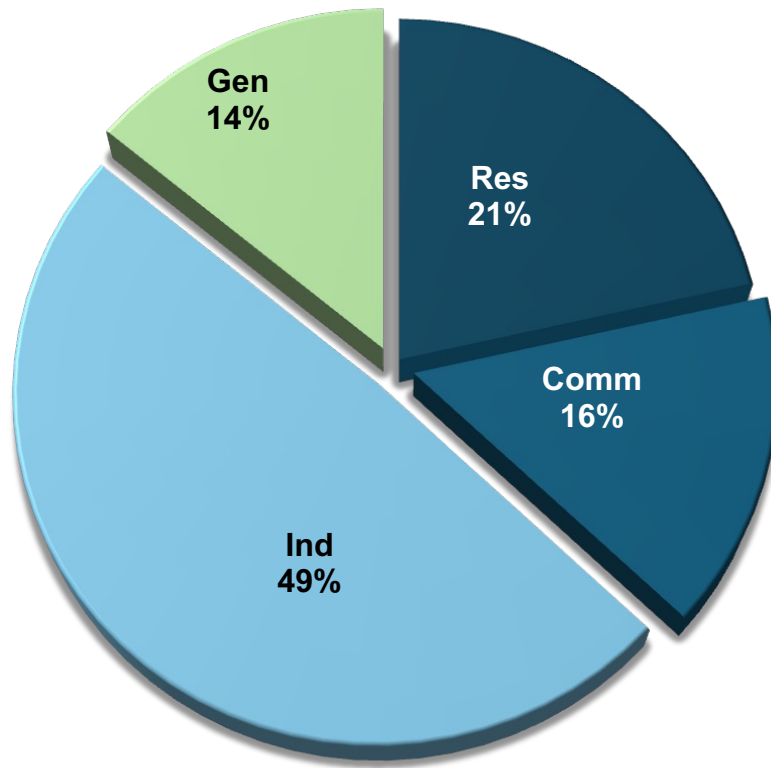


# Historic Gas Demand - Regional

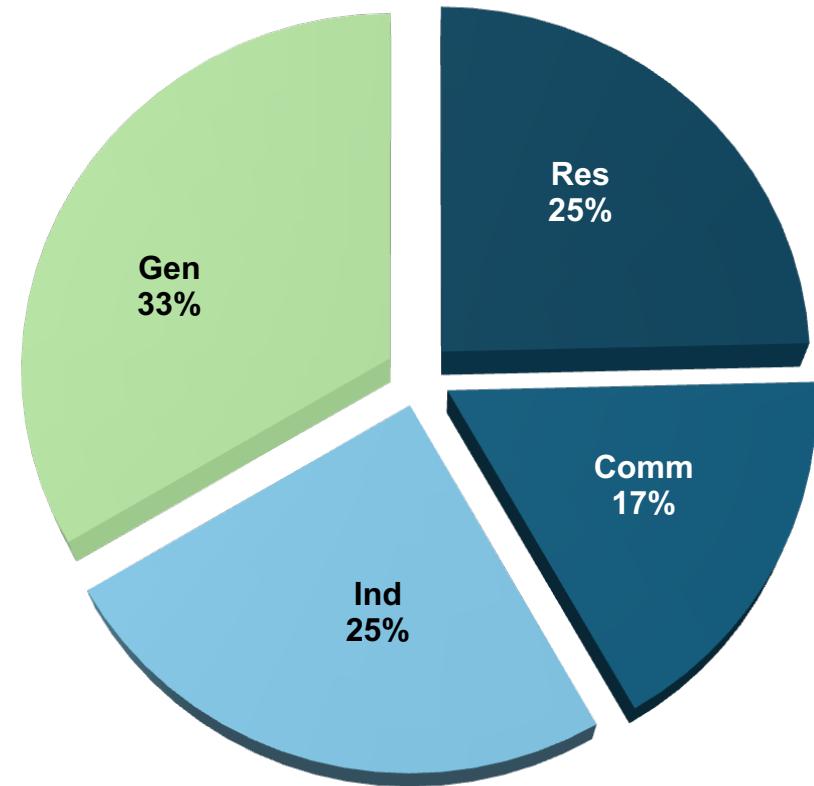


# Load Composition

1998

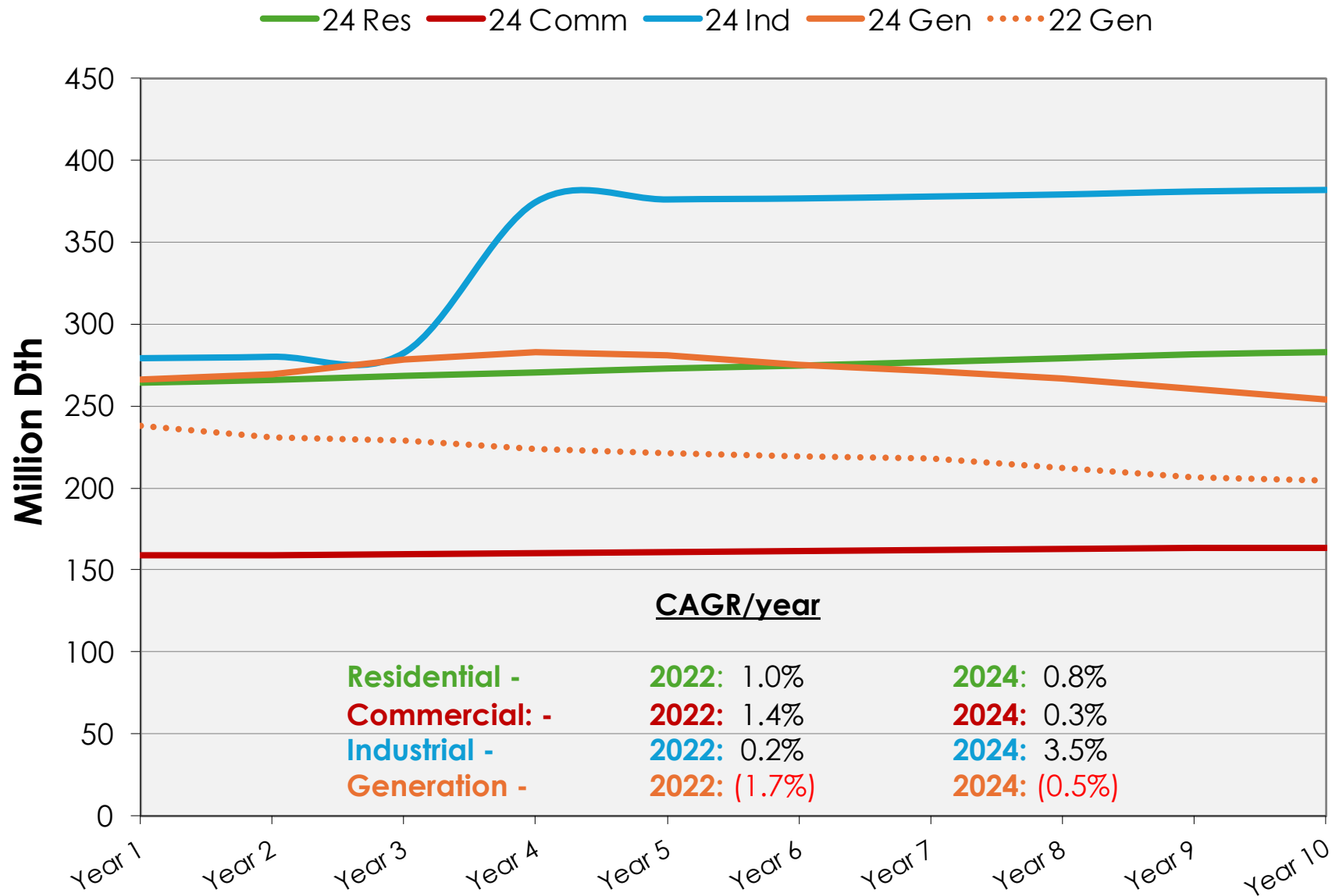


2023

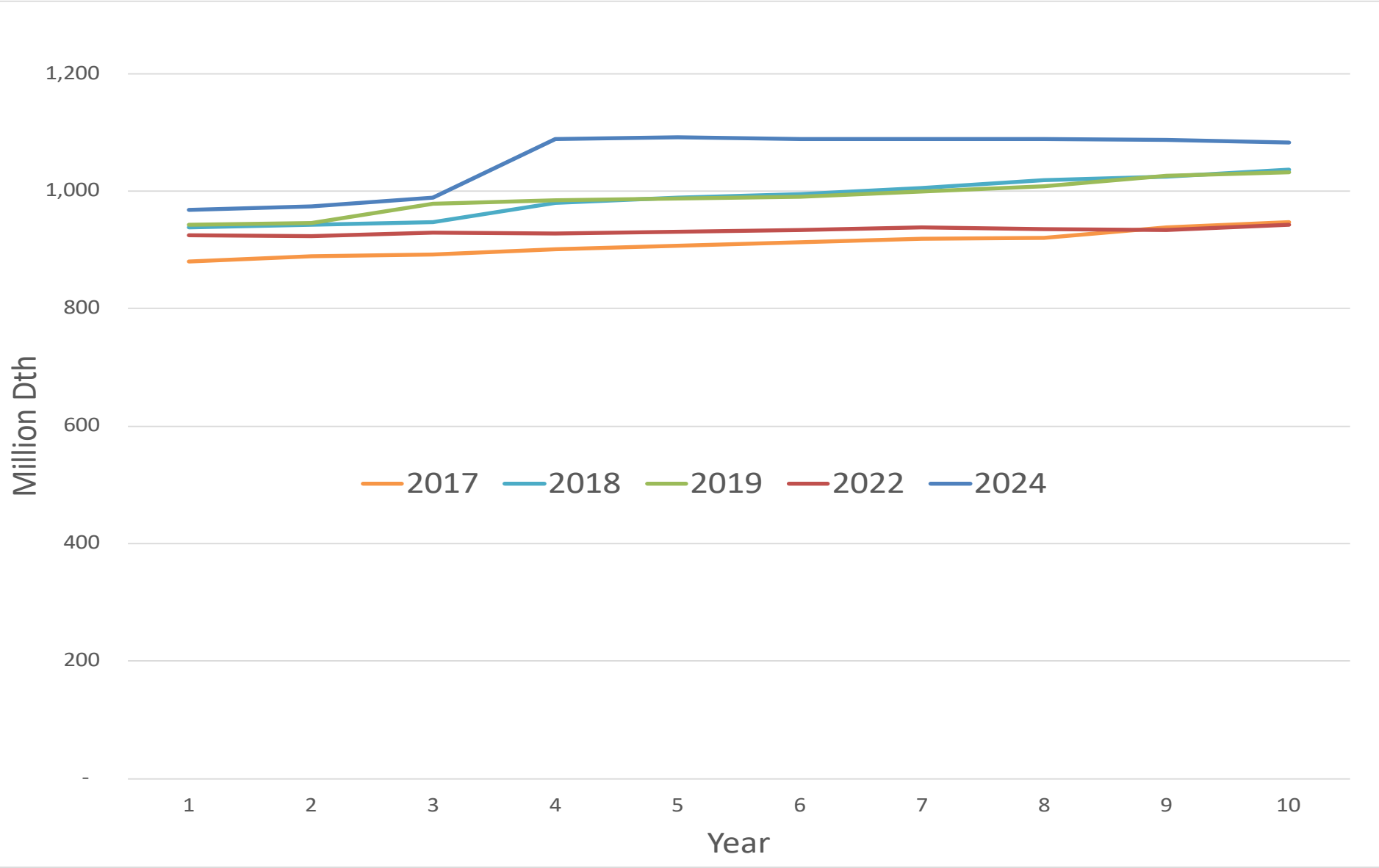




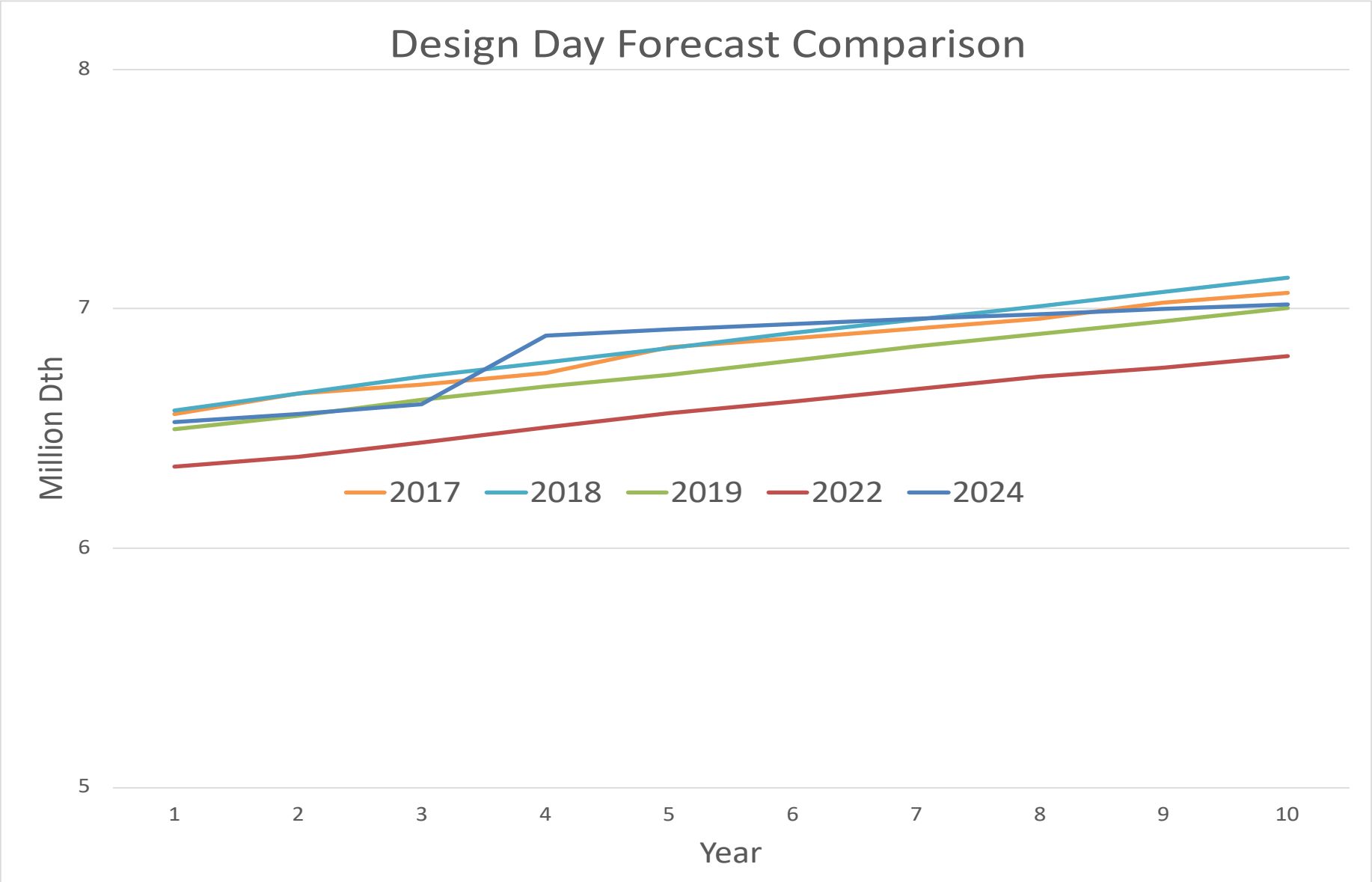
# 10 Year Annual Demand Forecast



# Base Forecast Comparison



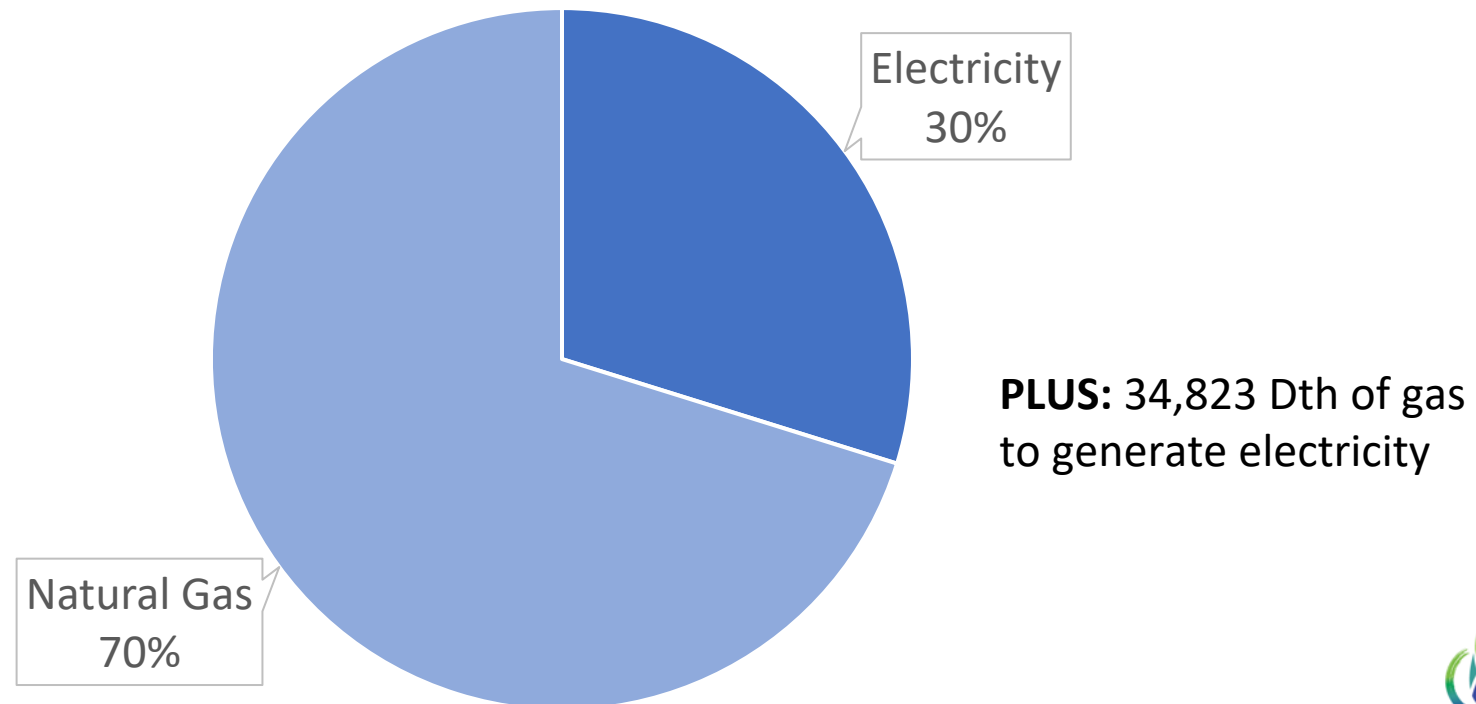
# Design Day Forecast Comparison



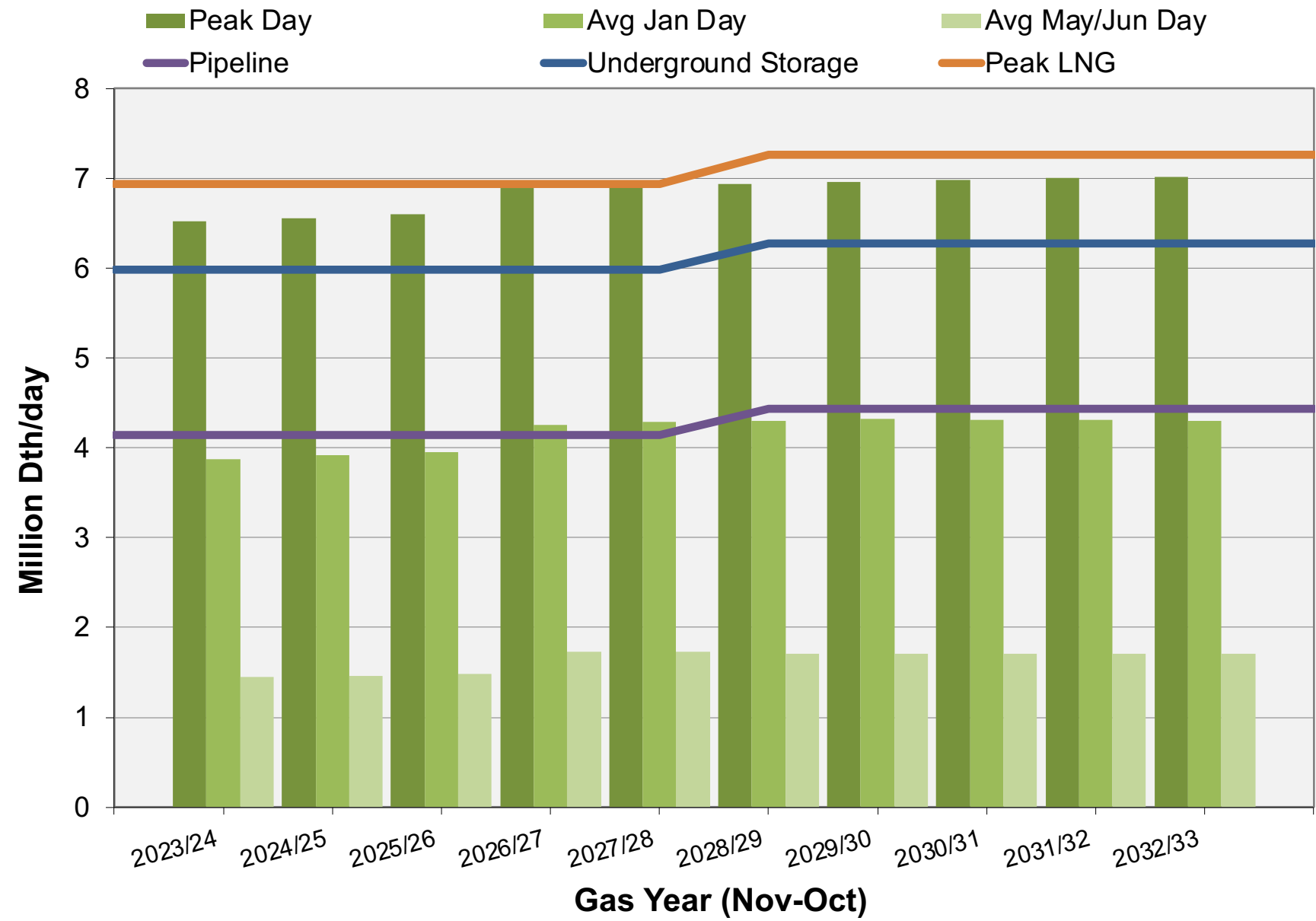
# January 14, 2024, 9am-10am (OR/WA):

- **27,206 MWh delivered via electric system (92,829 Dth)**
- **64,050 MWh delivered via gas system (218,546 Dth)**

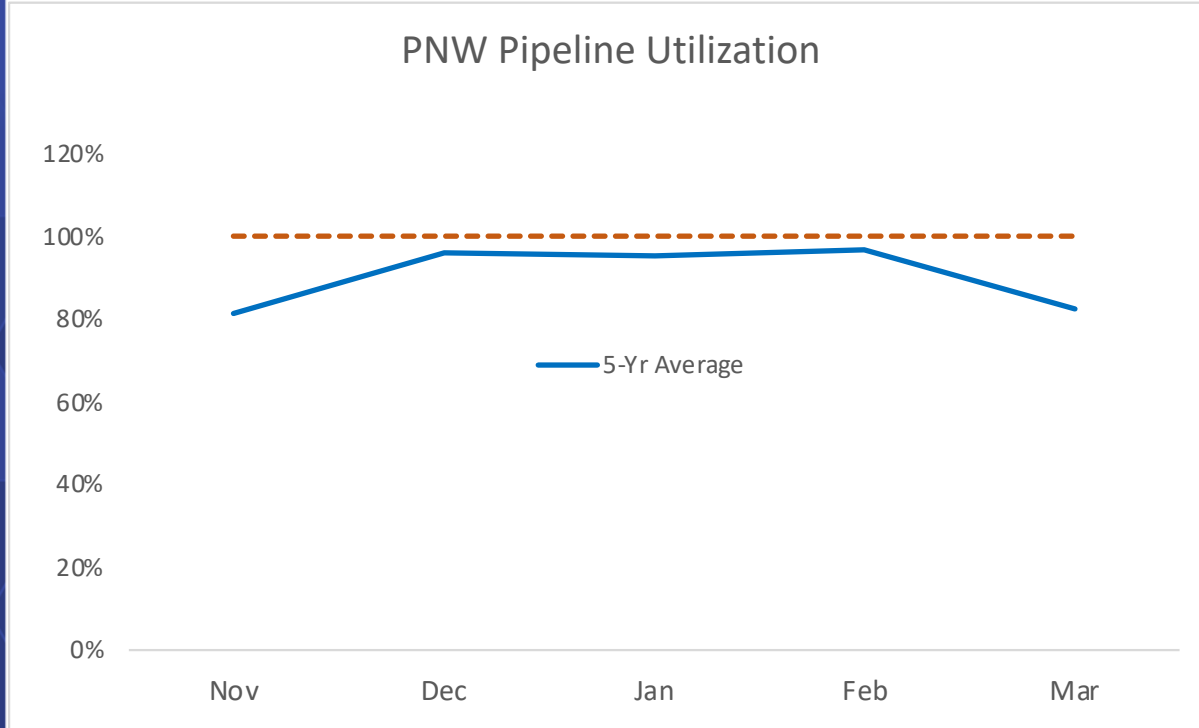
## OR & WA Combined



# Peak/Avg Supply Demand Balance



# Pipeline Utilization



	Nov	Dec	Jan	Feb	Mar
2018/19 Winter	82%	100%	108%	118%	94%
2019/20 Winter	84%	97%	96%	91%	85%
2020/21 Winter	77%	90%	89%	95%	81%
2021/22 Winter	75%	93%	94%	88%	67%
2022/23 Winter	88%	101%	89%	93%	85%

Load Factor	Nov	Dec	Jan	Feb	Mar
Max	88%	100%	100%	100%	94%
Min	75%	90%	89%	88%	67%
5-Yr Average	81%	96%	95%	97%	82%
	100%	100%	100%	100%	100%



# NWGA

Northwest Gas Association

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## Questions?

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