# Resource Planning Advisory Group Meeting

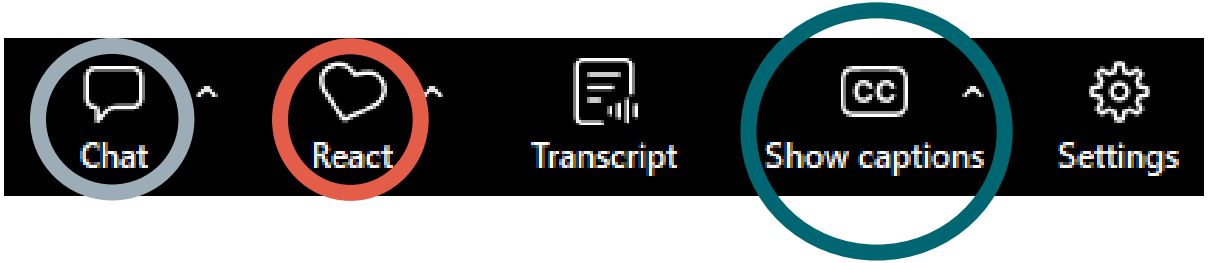
## 2027 Integrated System Plan

March 26, 2026

PUGET SOUND ENERGY

# Welcome to the meeting!

Use the **React** feature to raise your hand or respond to content with emojis




RPAG members and PSE staff are welcome to use the **Chat** feature

Click **Show Captions** to see real-time closed captioning

# Facilitator requests

- Engage constructively and courteously towards all participants
- Respect the role of the facilitator to guide the group process
- Avoid use of acronyms and explain technical questions
- Use the feedback form or email isp@pse.com for additional input to PSE
- Aim to focus on the webinar topic
- Public comments will occur after PSE's presentations

# Safety moment

- Tips for safe yardwork and gardening this spring:
  - Use three points of contact on ladders
  - Use eye protection when operating a mower or weed-eater
  - Wear slip resistant shoes
  - Use tools, not your hands, to dig in the dirt

# Today’s speakers

- Kara Durbin, Director, Clean Energy Strategy, PSE
- Brian Tyson, Manager, Clean Energy Planning and Implementation, PSE
- Stephanie Price, Lead – Electric, Load Forecasting and Analysis, PSE
- Chhandita Das, Lead – Gas, Load Forecasting and Analysis, PSE
- Lorin Molander, Manager, Load Forecasting and Analysis, PSE

# Agenda

| Time | Agenda Item | Presenter / Facilitator |
|---|---|---|
| 1:00 p.m. – 1:05 p.m. | Welcome and introductions | Annie Kilburg Smith, Triangle Associates |
| 1:05 p.m. – 2:05 p.m. | Advancing definitions of societal impacts in the cost test | Kara Durbin, PSE<br>Brian Tyson, PSE |
| 2:05 p.m. – 2:45 p.m. | Demand forecast | Stephanie Price, PSE<br>Chhandita Das, PSE<br>Lorin Molander, PSE |
| 2:45 p.m. – 3:00 p.m. | Next steps and public comment opportunity | Annie Kilburg Smith, Triangle Associates |
| 3:00 p.m. | Adjourn | All |

# Meeting purpose

- Continue the cost test discussion from the February RPAG meeting
- Provide the updated demand forecast assumptions since the July 29, 2025 RPAG meeting
- Discuss ISP load scenario assumptions for large loads and electric vehicles

# What we need from you

- Share your questions, reflections, and advice on today's topics
- Let us know if anything is missing or unclear
- Flag areas where deeper discussion is needed
- Help us identify risks, tensions, or points of misalignment early

# Advancing definitions of societal impacts in the cost test

**Kara Dubin, PSE**
Director, Clean Energy Strategy

**Brian Tyson, PSE**
Manager, Clean Energy Planning and Implementation

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# Objectives

- *Consult* RPAG on developing cost test approach
- Feedback PSE needs for cost test elements
  - Suggestions and ideas for measuring specific elements identified in cost test rules
- How feedback will be used
  - PSE will consider all feedback in defining metrics for evaluating cost test elements

# Feedback themes from February RPAG meeting

| Theme | Response |
|---|---|
| How will the cost test and decision framework work? | Defining elements and metrics is a critical early step; we will be coming back to the RPAG in the summer to talk more about the decision-making process |
| How will qualitative elements be evaluated next to monetized/quantitative elements? | |
| Interest in quantifying reliability, resiliency, and risk at the portfolio level | PSE is looking into other ways/options for measuring reliability, resiliency, and risk in the analysis – see slide 19 |
| How do you consider supply stability, volatility, and the value of resource diversity? | |
| Better understanding of the risk reduction premium element | Very specific to Climate Commitment Act (CCA) allowance pricing; incorporated into model because we assume CCA ceiling prices |

# March advisory group focused discussions

## EAG (March 16)

- Economic development
- Equity impacts

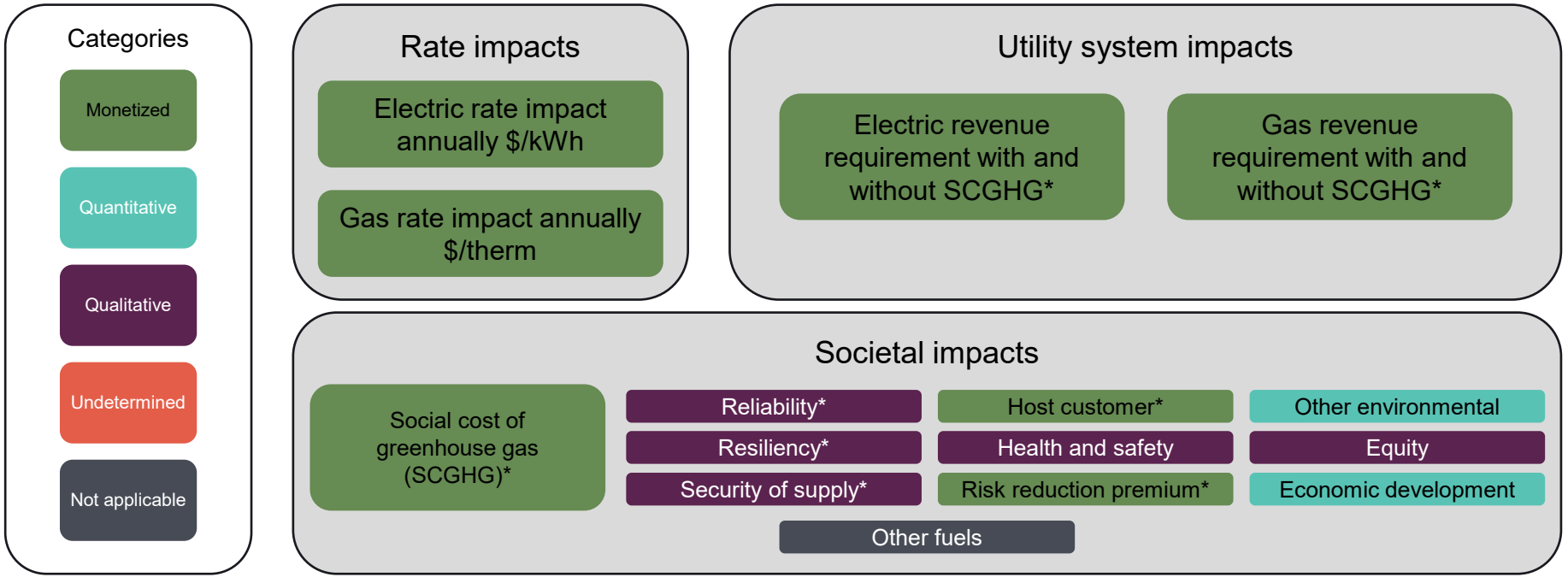
## CRAG (March 25)

- Host customer

## RPAG (March 26)

- Risk reduction premium
- Economic development
- Reliability, resilience, and security of supply

# Current element categorization






*Embedded in planning model

# How will we account for the risk reduction premium?

- Specific to CCA ceiling prices as defined by rule
- PSE assumes ceiling prices for all scenarios therefore portfolio costs already incorporate CCA allowance costs in the total

**Proposed approach:**

Separately estimate difference between CCA ceiling price and expected price in total dollars by portfolio for comparison purposes

480-96-030 (8)(a)(ii)(K)

A risk reduction premium that must account for the applicable allowance ceiling prices approved by the department of ecology pursuant to the Climate Commitment Act, chapter 70A.65 RCW.

Does this approach seem reasonable and sufficient? If not, what alternative do you suggest?



**Embedded in planning model*

# How will we account for economic development?

- Not defined by rules
- No known proxy for quantifying or monetizing economic development in resource planning modeling

**Proposed approach:**

Leverage Job and Economic Development Impact (JEDI) Model to quantity (count) jobs by portfolio

EAG feedback

- General support for quantifying jobs using a model like JEDI
- Interest in quantifying jobs by category and location if possible
- Interest in workforce development for named communities to meet future job needs for the long-term

Does this approach seem reasonable and sufficient? If not, what alternative do you suggest?



**Embedded in planning model*

# How will we account for reliability, resiliency, and security of supply?

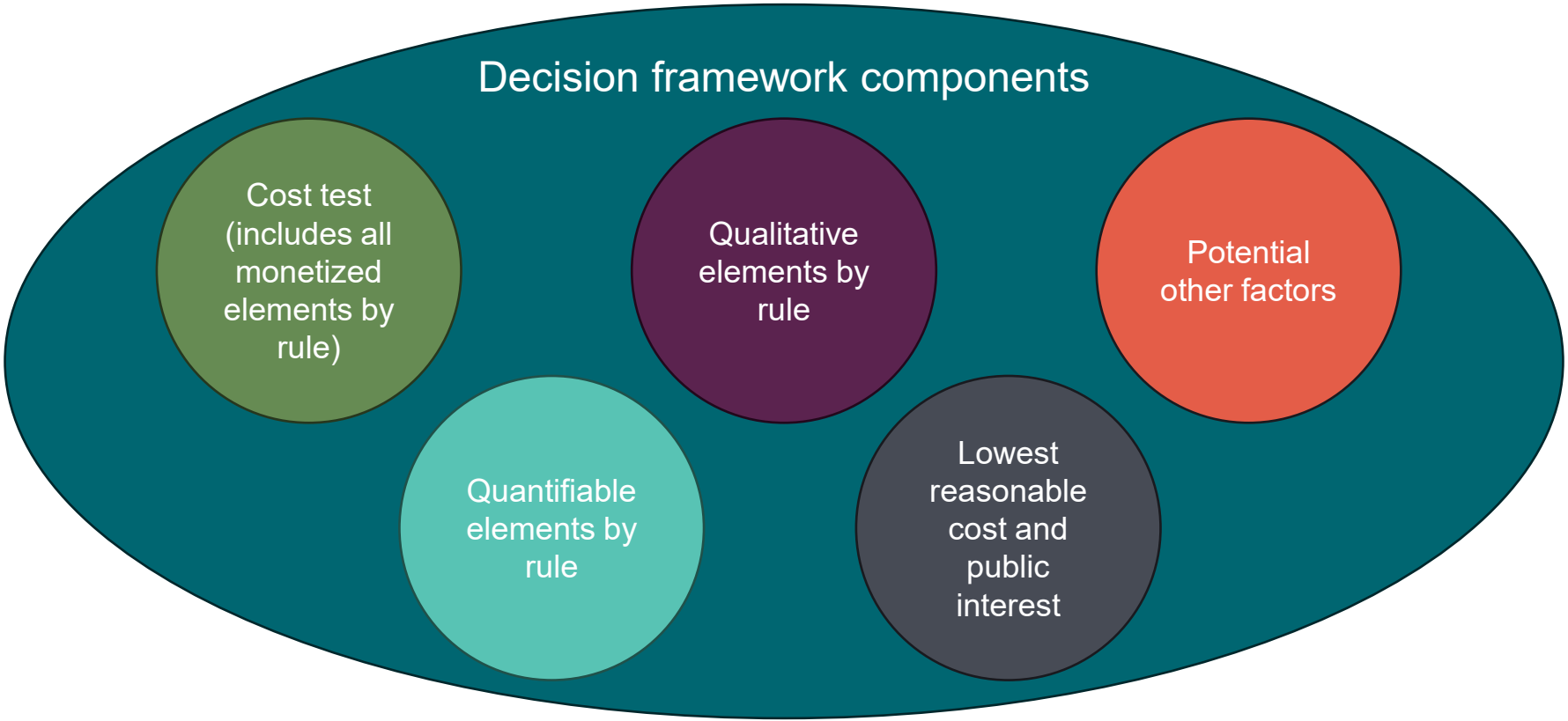
- Elements are not identical, but there is overlap
- PSE is carefully reviewing feedback from Staff and LBNL but has not yet identified clear, quantifiable metrics beyond those already captured in modeling

Feedback examples:

- Load reduction (EE, DR, DER) reduces supply-side acquisition risk
- Different utility-scale resources have different acquisition and operation benefits and risks

Do you have ideas for how PSE could assess potential differences in reliability, resiliency, and/or security of supply in different generic portfolios beyond what is already captured in modeling?

# Cost test and decision framework



# Demand Forecast

## Updated Reference Case

**Stephanie Price**
Lead – Electric, Load Forecasting & Analysis

**Chhandita Das**
Lead – Gas, Load Forecasting & Analysis

**Lorin Molander**
Manager, Load Forecasting & Analysis

March 26, 2026

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# Objectives

Inform the RPAG about:

- Updated base/reference case demand forecast assumptions since the July 2025 RPAG
  - Customer growth
  - Electric vehicle adoption/loads
- ISP load scenario assumptions for:
  - Large loads
  - Electric vehicles

# The original ISP demand forecast presented in July 2025 was based on these key assumptions

**Building electrification**

- Base/Reference Case reflects impacts of policies consistent with HB 1589
- Impacts of currently planned PSE programs funded by Climate Commitment Act (CCA) revenue and PSE's decarbonization pilot programs
- Impacts of customers electrifying without any incentives are included (i.e., "natural rate of electrification")

**Customer growth**

- Growth in the near-term is expected due to housing permit forecasts
- Gas customer growth expected as observed in recent trends and feedback from builder community

**Transportation electrification**

- State transportation targets are assumed to be met for the light duty vehicles, but not for medium/heavy duty
- Federal policy reversal/sentiment tempers electric vehicle adoption outlook

**Demand-Side resources (DSR)**

- Recently developed as part of 2027 Integrated System Planning (ISP) analytics

**Climate change**

- Normal temperatures that warm over time are assumed

**Large load additions ("block loads")**

- Large retail customer loads with high/certain probability of realization

# Based on changing conditions, policy, and feedback from the RPAG, assumptions about customer growth and EV adoption have been updated

## JULY 2025 ASSUMPTION

### Customer growth

- Gas customer growth expected

### Transportation electrification

- State targets met for light duty, but not for medium/heavy duty

## UPDATED

- Reduced electric customer growth due to 2025 observed trends and updated economic and housing permit outlook
- Zero residential and negative commercial gas customer growth post 2026

- State targets will not be met for both light duty and medium/heavy duty vehicles

*Results of the updated reference case demand forecast are included in the appendix and are compared to the original ISP demand forecast results presented at the July 2025 RPAG meeting*

# ISP Load Scenarios:
# Electric Vehicle and Large Load Assumptions

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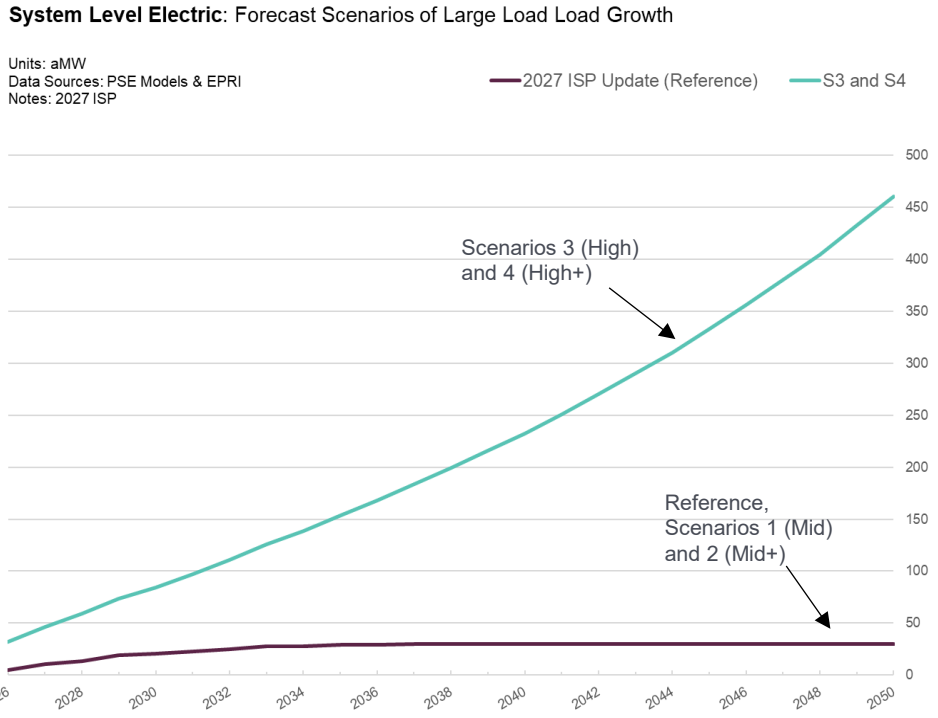
# Assumptions for large loads and EV adoption are different for Scenario 3 (High) and Scenario 4 (High+) vs. the other scenarios

| | Scenarios | Building Electrification | Large Load Requests | Customer Programs | EV Adoption | Requirement |
|---|---|---|---|---|---|---|
| | **Reference (HB 1589): Current Trends** | Current building electrification pilots, funding low-income through CCA | **Data Centers (+ other new large load requests): based on high probability of interconnection** ***(lower demand impact)*** | **Reference CPA for customer programs:** no gas appliance conservation, building codes restricting gas, 2% conservation & 10% DR or commercially feasible beginning in 2030 (electric only) | **Reference** | WAC 480-96-050 (1) |
| | **Scenario 1 (Mid): Incentivized electrification** | Starting in 2030, building electrification based on equipment failure and market adoption rate with an incentive | **Data Centers (+ other new large load requests): based on high probability of interconnection** ***(lower demand impact)*** | Customer Programs (DR, DER, DSR, etc.) sized to load (adjusted CPA to demand levels) | **Reference** | WAC 480-96-050 (4) (E) |
| | ***NEW* Scenario 2 (Mid +): Building Electrification Only** | Starting in 2030, electrify buildings at a pace that brings the emissions of both utilities **below** the utility's proportional share of the state GHG emission goals | **Data Centers (+ other new large load requests): based on high probability of interconnection** ***(lower demand impact)*** | Customer Programs (DR, DER, DSR, etc.) sized to load (adjusted CPA to demand levels) | **Reference** | WAC 480-96-050 (4) (D) & (E) |
| **"S3"** | **Scenario 3 (High): Enhanced electrification** | Starting in 2030, electrify buildings at a pace that brings the emissions of both utilities **below** the utility's proportional share of the state GHG emission goals **Constrained by equipment failure** | **Data Centers (+ other new large load requests): based on mid probability of interconnection** ***(higher demand impact)*** | Customer Programs (DR, DER, DSR, etc.) sized to load (adjusted CPA to demand levels) | **High** | WAC 480-96-050 (4) (D) & (E) |
| **"S4"** | **Scenario 4 (High+): Unconstrained electrification** | Starting in 2030, electrify buildings at a pace that brings the emissions of both utilities **below** the utility's proportional share of the state GHG emission goals | **Data Centers (+ other new large load requests): based on mid probability of interconnection** ***(higher demand impact)*** | Customer Programs (DR, DER, DSR, etc.) sized to load (adjusted CPA to demand levels) | **High** | WAC 480-96-050 (4) (D) & (E) |

*For large load requests:*
*"High probability" means more certainty is needed to assume a large load request will ultimately become a customer.*
*"Mid probability" means less certainty is needed to assume a large load request will ultimately become a customer.*

# The High and High+ scenarios include increased data center load growth for higher large load impact assumption




- Assumes 5% annual data center growth, per Electric Power Research Institute (EPRI) state projections plus the reference case assumptions

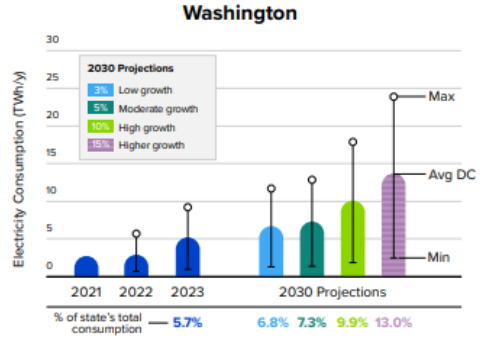



*Figure A15.*
*Projected electricity consumption in Washington data centers*

*Source: "Analyzing Artificial Intelligence and Data Center Energy Consumption"; JORDAN ALJBOUR, TOM WILSON, POORVI PATEL, May 2024*

*https://www.epri.com/about/media-resources/press-release/q5vu86fr8tkxatfx8ihf1u48vw4r1dzf*

- Scenario assumptions are not based on actual PSE interconnection queue



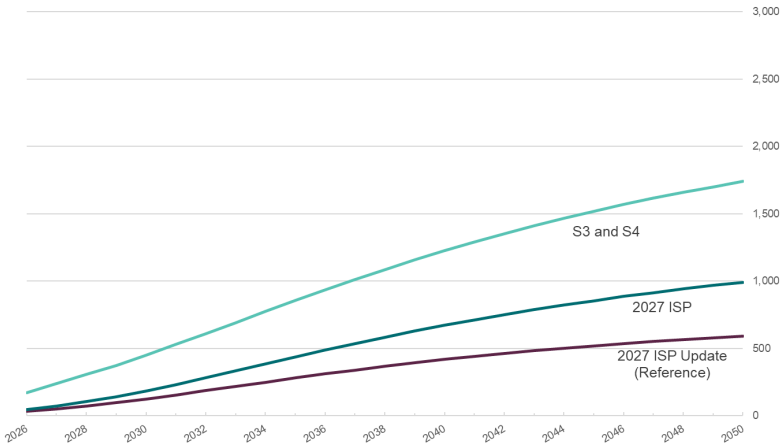
*aMW: average megawatt*

# The EV forecast high adoption scenario is assumed for scenarios 3 (High) and 4 (High+) EV loads assumption

The 2027 ISP forecast presented at the July 29, 2025, RPAG assumed the mid/base EV forecast. The updated 2027 ISP forecast assumes the low EV forecast scenario due to policy changes

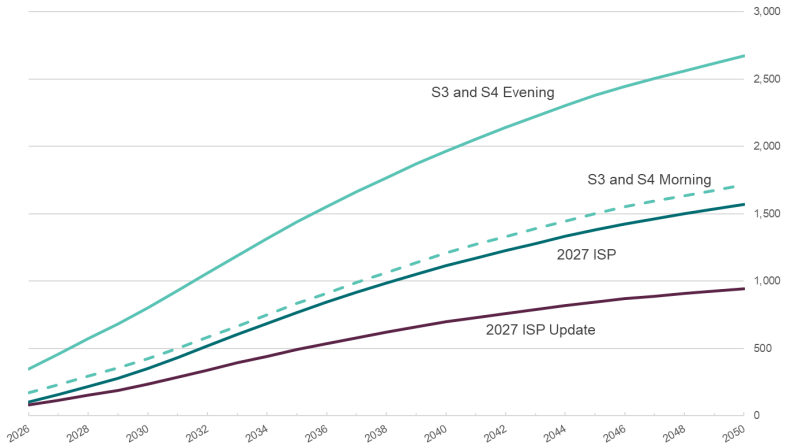
**Electric - System**: Scenario Electric Vehicle Load Growth

Units: aMW
Data Sources: Guidehouse Consulting
Notes: 2027 ISP




**Electric - System**: Scenario Electric Vehicle Winter Peak Growth

Units: MW
Data Sources: Guidehouse Consulting
Notes: 2027 ISP




*Note: "2027 ISP" is the original ISP base demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast. "S3 and S4" refer to the ISP Scenarios 3 (High) and 4 (High+).*

# Guidehouse developed a low, base, and high EV forecast for the 2027 ISP

Guidehouse presented the EV forecast at the June 18, 2025, RPAG meeting

## F25 Scenario Definitions

| Drivers | Description | Low Scenario | Base Scenario | High Scenario |
|---|---|---|---|---|
| Incentives | Dollar per EV tax incentive ($) | Any existing and planned **incentives discontinued** | **Currently existing and planned** incentive policies | **Additional "cash on the hood" incentive** per vehicle covering 50% of incremental cost of EV over ICEV[1] |
| Vehicle Cost | EV MSRP ($) | **Base EV MSRP** forecast - GHI | **Base EV MSRP** forecast - GHI | **15% lower EV MSRP** vs. base forecast (leading to decreased EV operating costs) |
| Fuel Prices | Gasoline and diesel prices ($ per gallon) | **AAA average base** assumption, adjusted for inflation | **AAA average base** assumption, adjusted for inflation | **75% higher gasoline and diesel prices** vs. base (leading to increased operating ICEV costs) |
| Consumer Awareness & Acceptance | Marketing & outreach impacting customer familiarity (i.e., awareness, acceptance) | **Lower consumer awareness and acceptance** vs base (leading to decreased EV adoption) | **Base assumption,** calibrated to Washington's historical consumer awareness metrics - GHI | **1/3 higher consumer awareness and acceptance** vs. base (leading to increased EV adoption)[1] |
| Regulations | Policies regulating ICEVs and EVs | ACT and ACC **policies overturned** | **ACT policy sales targets not met.** Financial penalty imposed on ICEVS for ZEV sales shortfall | **Adoption consistent with relevant regulatory rules**, including Advanced Clean Cars II and Advance Clean Trucks |
| Vehicle Miles Traveled | Annual VMT by vehicle class and powertrain | **Base assumption** from FHWA, EMFAC, EDF, and AFDC | **Base assumption** from FHWA, EMFAC, EDF, and AFDC | **30% higher VMT** vs. base (leading to increased energy requirement) |

[1]Incentives and Consumer Awareness and Acceptance drivers will be adjusted to achieve regulatory targets per Regulations driver requirement.

2027 ISP Update

2027 ISP

Guidehouse Outwit Complexity



*MSRP: manufacturer's suggested retail price VMT: vehicle miles traveled ICEV: internal combustion engine vehicle EV: electric vehicle*

# Questions?

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# Next steps

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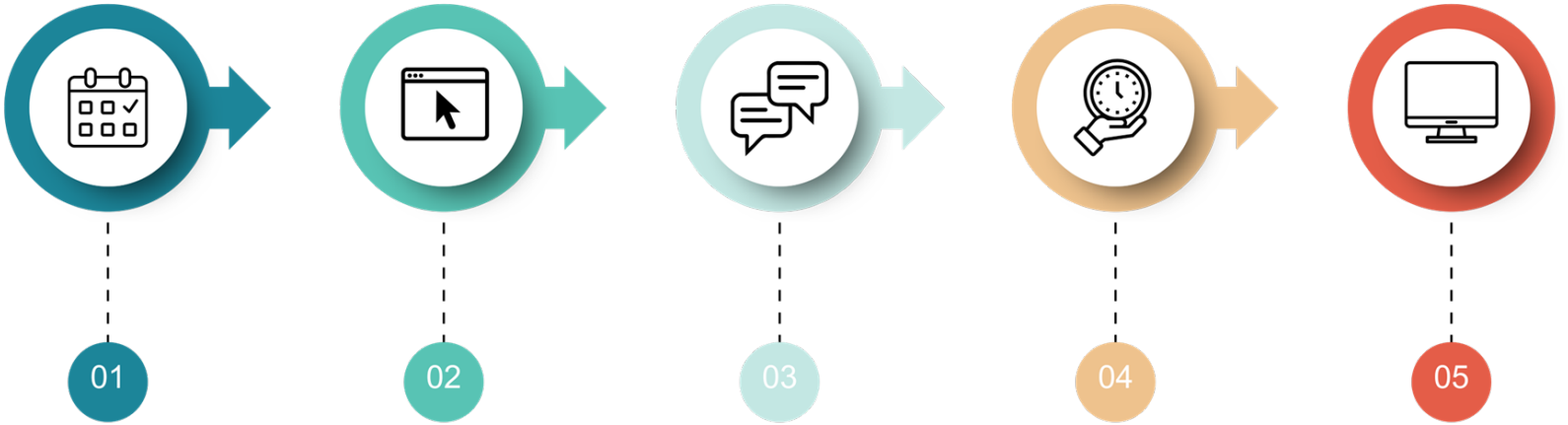
# Feedback process




**One week prior to meeting**

The feedback window for the upcoming meeting opens.

**3-5 business days prior to meeting**

PSE posts the meeting agenda and slide deck on the Clean Energy website.

**Day of meeting**

PSE engages RPAG for feedback and facilitates a public comment opportunity.

**One week post meeting**

Feedback window for the latest RPAG meeting closes. Feedback received outside this window will go into the subsequent feedback report.

**Four weeks post meeting**

PSE posts the meeting summary and feedback report from the latest RPAG meeting on the Clean Energy website.

# Visit our website

- You can find meeting materials, meeting summaries, feedback reports, and links to meeting recordings on the RPAG portion of our clean energy planning website.

## Upcoming meetings

**August 2025**
No scheduled meeting

**September 30, 2025**
1 p.m. – 4 p.m.

**October 28, 2025**
1 p.m. – 3 p.m.

**November 13, 2025**
1 p.m. – 4 p.m.

Registration information and how members of the public may participate are posted 2-4 weeks in advance of each meeting. Meeting materials are posted at least 3 business days in advance of each meeting.

**RPAG Meeting | July 29, 2025**

Demand forecast after conservation
7/29/25 | 10 a.m. – 1 p.m. Puget

**RPAG Meeting | June 24, 2025**

Gas modeling and assumptions, gas delivery system, non-pipe alternatives

**RPAG info session | June 18, 2025**

Electric vehicle forecast information session for the 2027 ISP 6/18/25 | 11

**RPAG Meeting | May 15, 2025**

Resource adequacy methodology and electric modeling for the 2027 ISP

**RPAG Meeting | March 25, 2025**

Customer strategy for the 2027 ISP
3/25/25 | 1 p.m. – 4 p.m. Puget

**RPAG Meeting | Feb. 27, 2025**

Electric delivery system, regional and local transmission, and finalizing

# Upcoming activities

| Date | Activity |
|---|---|
| April 2, 2026 | Feedback form for this meeting closes |
| April 2026 | No scheduled RPAG meeting |
| May 28, 2026 | RPAG meeting |

# Contact us

- Via email at isp@pse.com
- Via feedback form at: https://www.cleanenergyplan.pse.com/contact
- Leave us a voicemail at 425-818-2051
- Subscribe to our email list
- Visit our website: cleanenergyplan.pse.com

# Public comment opportunity

March 26, 2026

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# How to participate in public comment opportunity

- Please use the “raise hand” feature if you would like to provide comment
- Each speaker will have up to 3 minutes to give comments
- Comments should relate to today’s meeting topics
- Please keep remarks respectful – no personal attacks
- Comments and questions will be included in the feedback report with PSE’s response
- You are welcome and encouraged to send written feedback and questions to isp@pse.com

# Thank you for joining us!

March 26, 2026

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# Appendix

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# Definitions and acronyms

| Acronym | Definition |
|---|---|
| aMW | Average megawatt |
| CCA | Climate Commitment Act |
| CEIP | Clean Energy Implementation Plan |
| CPA | Conservation potential assessment |
| DER | Distributed energy resources |
| DR | Demand response |
| DSM | Demand-side management |
| DSR | Demand-side resources |
| DSP | Delivery system planning |
| EE | Energy efficiency |
| EV | Electric vehicle |
| GHG | Greenhouse gas |

| Acronym | Definition |
|---|---|
| ICEV | Internal combustion engine vehicle |
| IRP | Integrated resource plan |
| ISP | Integrated system plan |
| JEDI | Job and economic development impact model |
| MSRP | Manufacturer's suggested retail price |
| NG | Natural gas |
| NPA | Non-pipe alternatives |
| RA | Resource adequacy |
| RFP | Request for proposal |
| RPAG | PSE's Resource Planning Advisory Group |
| SCGHG | Social cost of greenhouse gas |
| WAC | Washington Administrative Code |

# Demand Forecast Update: Electric Results

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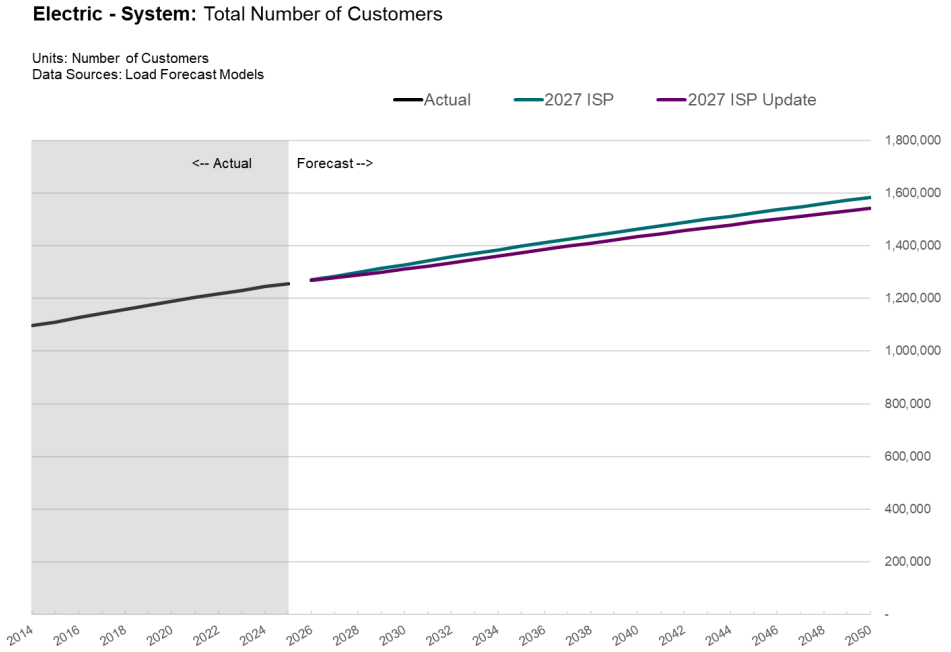
# The updated electric customer growth forecast is lower than the original 2027 ISP forecast

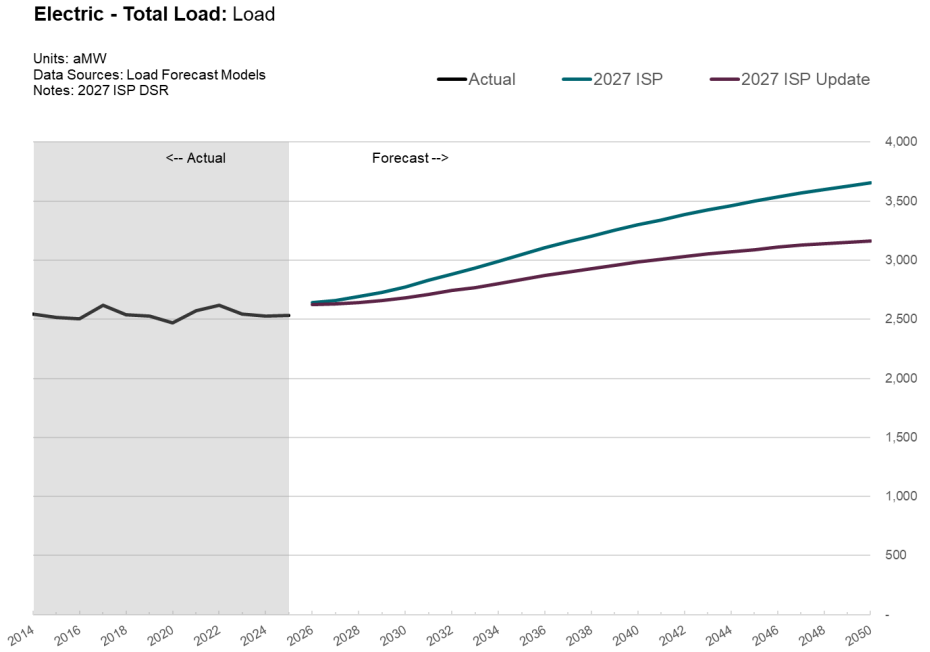



*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | 5-year | 10-year | 20-year |
| 2027 ISP | 1.1% | 1.1% | 1.0% |
| 2027 ISP Update | 0.8% | 0.9% | 0.9% |

| % of Total System Customer Count | | | |
|---|---|---|---|
| | 2026 | 2030 | 2045 |
| Residential | 88% | 88% | 88% |
| Non-residential | 12% | 12% | 12% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** |

# The updated electric system load forecast is lower than the original 2027 ISP forecast

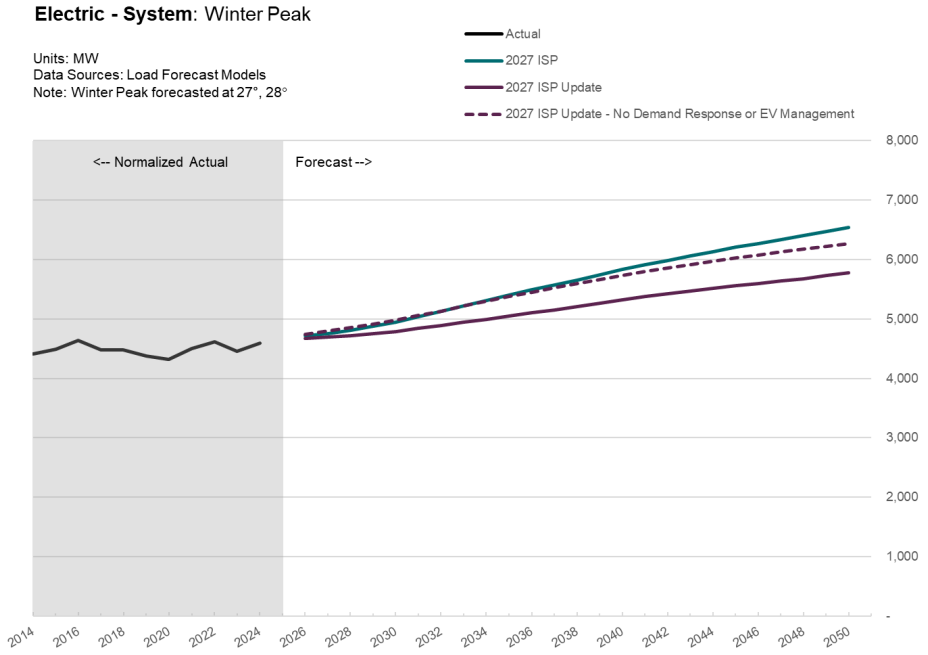



*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | **5-year** | **10-year** | **20-year** |
| 2027 ISP | 1.2% | 1.5% | 1.5% |
| 2027 ISP Update | 0.5% | 0.9% | 0.9% |

| **aMW** | **2026** | **2030** | **2035** | **2040** | **2045** |
|---|---|---|---|---|---|
| 2027 ISP | 2,642 | 2,775 | 3,047 | 3,298 | 3,499 |
| 2027 ISP Update | 2,623 | 2,680 | 2,837 | 2,983 | 3,090 |
| **Difference (%)** | **-0.7%** | **-3.4%** | **-6.9%** | **-9.6%** | **-11.7%** |

# The updated electric system winter peak forecast is lower than the original 2027 ISP forecast




*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

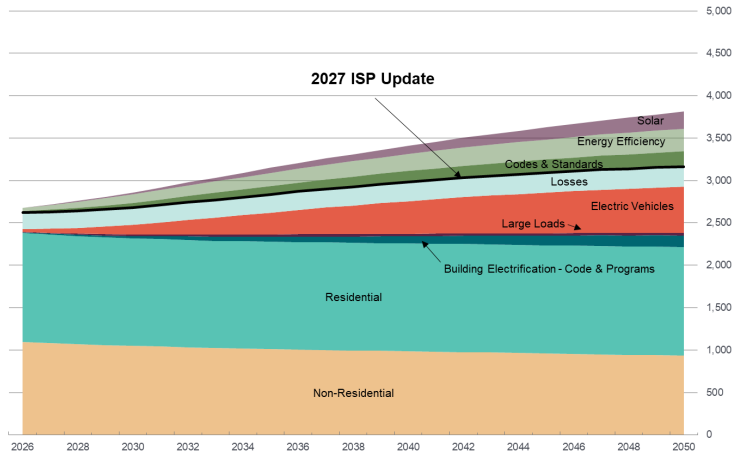
| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | 5-year | 10-year | 20-year |
| 2027 ISP | 1.3% | 1.5% | 1.4% |
| 2027 ISP Update | 0.7% | 0.9% | 0.9% |

| MW | 2026 | 2030 | 2035 | 2040 | 2045 |
|---|---|---|---|---|---|
| 2027 ISP | 4,716 | 4,946 | 5,401 | 5,831 | 6,206 |
| 2027 ISP Update | 4,676 | 4,786 | 5,053 | 5,324 | 5,560 |
| **Difference (%)** | **-0.8%** | **-3.2%** | **-6.4%** | **-8.7%** | **-10.4%** |

# Despite revised lower electric vehicle growth, EVs remain a major driver of electric load and peak growth

**System Level Electric:** Forecast of Load

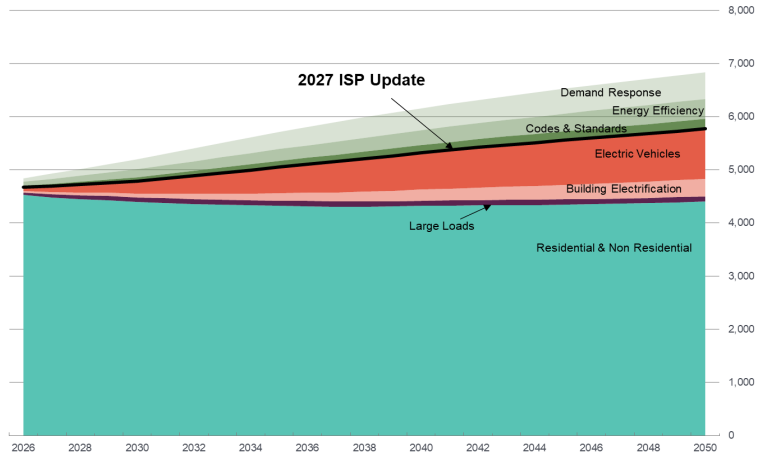
Units: aMW
Data Sources: PSE Energy Efficiency / Cadmus, PSE New Product Development / Guidehouse, and Load Forecast Models




| % of Total System Load | | | | | |
|---|---|---|---|---|---|
| | 2026 | 2030 | 2035 | 2040 | 2045 |
| Residential | 49% | 47% | 45% | 43% | 41% |
| Non-Residential | 42% | 39% | 36% | 33% | 31% |
| Building Electrification | 0% | 2% | 3% | 4% | 5% |
| EV Charging | 1% | 4% | 9% | 13% | 16% |
| Losses | 7.58% | 7.58% | 7.58% | 7.58% | 7.58% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** | **100%** | **100%** |

**System Level Electric:** Forecast of Winter Evening Peak

Units: MW
Data Sources: Load Forecast Models




| % of Total System Peak | | | | | |
|---|---|---|---|---|---|
| | 2026 | 2030 | 2035 | 2040 | 2045 |
| Residential & Non-residential | 98% | 94% | 87% | 83% | 80% |
| Building Electrification | 1% | 1% | 3% | 4% | 4% |
| EV Charging | 2% | 5% | 10% | 13% | 15% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** | **100%** | **100%** |

# Demand Forecast Update: Gas Results

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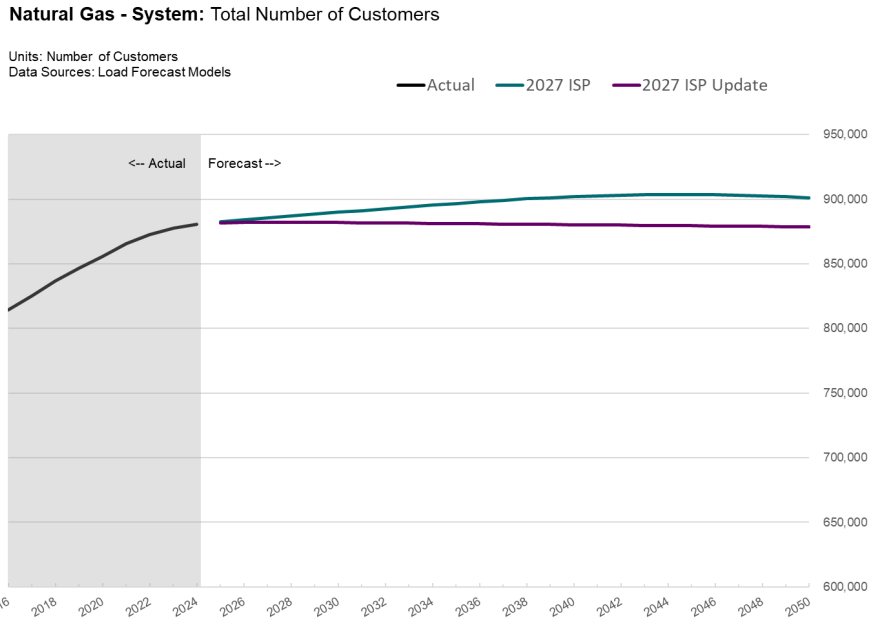
# The updated gas customer growth forecast is lower than the original 2027 ISP forecast

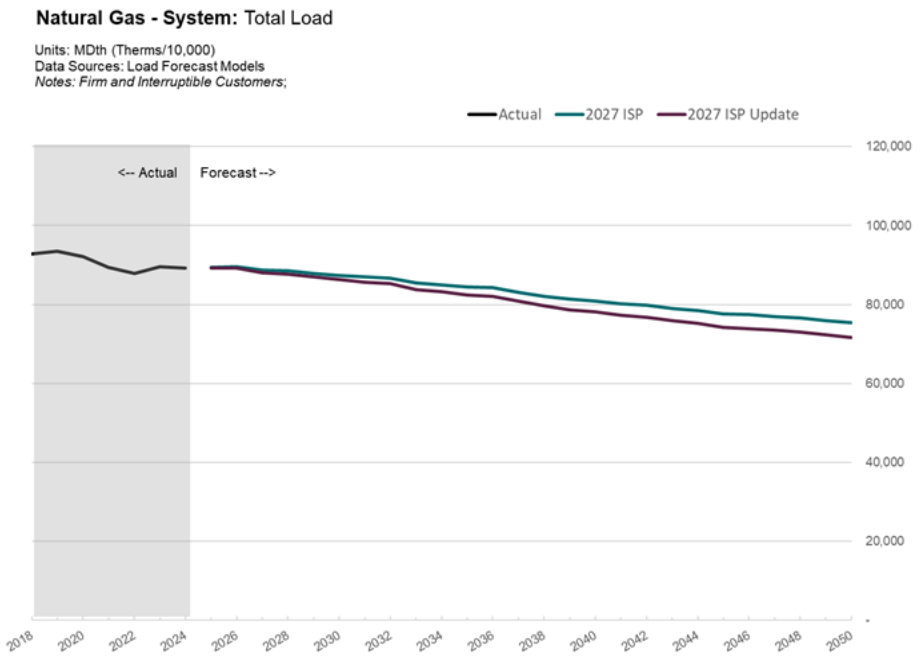



*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | **5-year** | **10-year** | **20-year** |
| 2027 ISP | 0.16% | 0.16% | 0.12% |
| 2027 ISP Update | 0.01% | -0.01% | -0.01% |

| % of Total System Customer Count | | | |
|---|---|---|---|
| | **2026** | **2030** | **2045** |
| Residential | 93% | 93% | 94% |
| Non-residential | 7% | 7% | 6% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** |

# The updated gas system load forecast is lower than the original 2027 ISP forecast

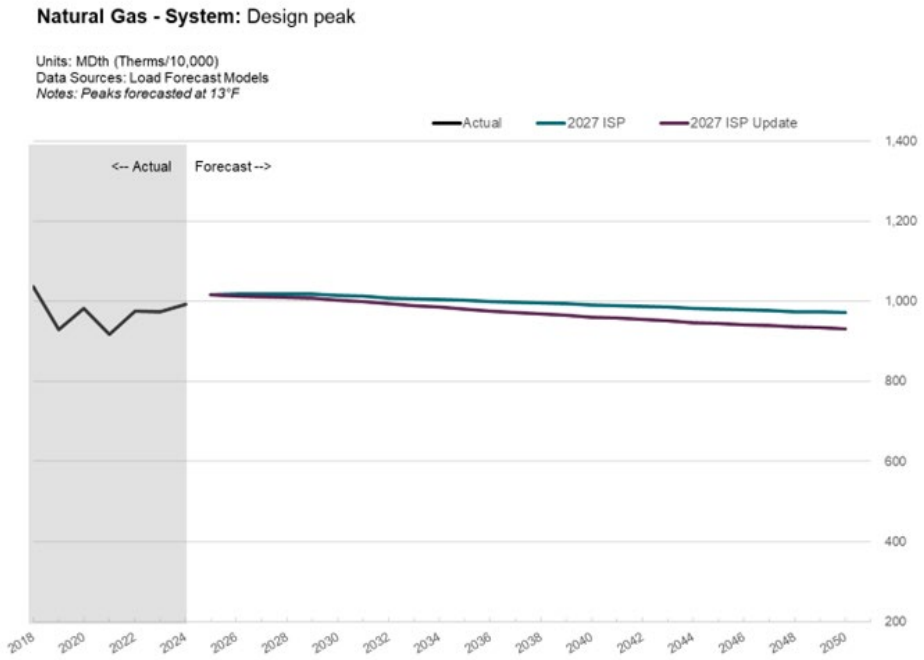



*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | **5-year** | **10-year** | **20-year** |
| 2027 ISP | -0.4% | -0.6% | -0.7% |
| 2027 ISP Update | -0.7% | -0.8% | -0.9% |

| **MDth** | **2026** | **2030** | **2035** | **2040** | **2045** |
|---|---|---|---|---|---|
| 2027 ISP | 89,652 | 87,388 | 84,444 | 80,949 | 77,661 |
| 2027 ISP Update | 89,274 | 86,274 | 82,419 | 78,129 | 74,272 |
| **Difference (%)** | **-0.4%** | **-1.3%** | **-2.4%** | **-3.5%** | **-4.4%** |

# The updated gas system peak forecast is lower than the original 2027 ISP forecast




*Note: "2027 ISP" is the original ISP base/reference case demand forecast presented at the July 2025 RPAG. "2027 ISP Update" is the revised ISP base/reference case demand forecast.*

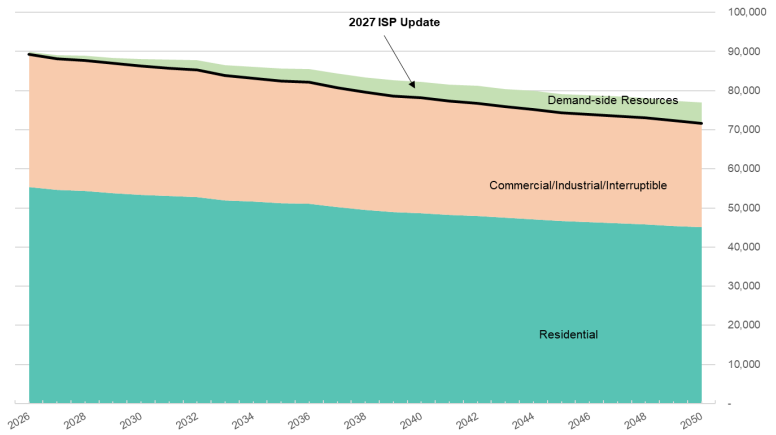
| Average Annual Rate of Growth (AARG) | | | |
|---|---|---|---|
| | **5-year** | **10-year** | **20-year** |
| 2027 ISP | -0.0% | -0.1% | -0.2% |
| 2027 ISP Update | -0.2% | -0.4% | -0.4% |

| **MDth** | **2026** | **2030** | **2035** | **2040** | **2045** |
|---|---|---|---|---|---|
| 2027 ISP | 1,018 | 1,016 | 1,002 | 991 | 981 |
| 2027 ISP Update | 1,014 | 1,004 | 981 | 961 | 944 |
| **Difference (%)** | -0.4% | -1.2% | -2.1% | -3.0% | -3.8% |

# The gas load and peak forecasts decline over the long term

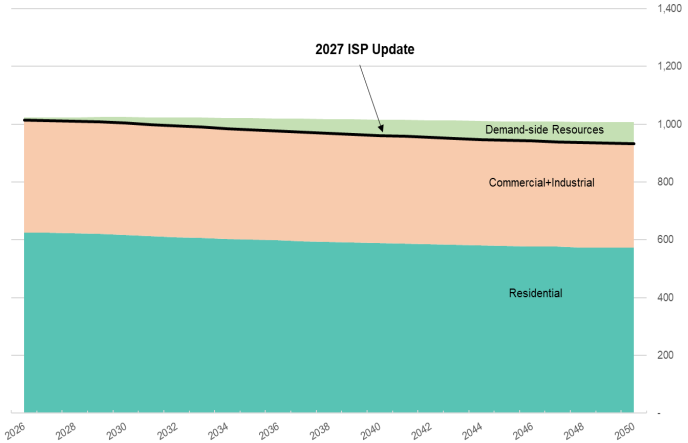
**Natural Gas - System:** Components of 2027 ISP Load Forecast

Units: MDth (Therms/10,000)
Data Sources: Load Forecast Models
Notes: 2027 ISP Demand-side Resources




**Natural Gas - System:** Components of 2027 ISP Peak Forecast Update

Units: MDth (Therms/10,000)
Data Sources: Load Forecast Models
*Notes: Peaks forecasted at 13°F*




| % of Total System Load | | | | | |
|---|---|---|---|---|---|
| | **2026** | **2030** | **2035** | **2040** | **2045** |
| Residential | 61% | 60% | 59% | 58% | 58% |
| Com/Indus/Interr | 37% | 37% | 36% | 35% | 34% |
| DSR: EE and C&S | 1% | 2% | 4% | 5% | 6% |
| Losses | 1.73% | 1.73% | 1.73% | 1.73% | 1.73% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** | **100%** | **100%** |

| % of Total System Peak | | | | | |
|---|---|---|---|---|---|
| | **2026** | **2030** | **2035** | **2040** | **2045** |
| Residential | 61% | 60% | 59% | 58% | 57% |
| Com/Ind | 38% | 38% | 37% | 37% | 36% |
| DSR: EE and C&S | 1% | 2% | 4% | 5% | 6% |
| **TOTAL SYSTEM** | **100%** | **100%** | **100%** | **100%** | **100%** |



*DSR: demand-side resources EE: energy efficiency C&S: codes and standards*