

**DOCKETED**

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# California Energy Commission

California Industrial Natural Gas Demand

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# Gas Demand In California

- Residential & Small Commercial – Space and water heating
- Commercial – Restaurants, educational facilities, commercial laundries, health care, food processing, etc.
- Industrial - Fuel and process heat
- Electric generation
  - Electric system reliability
  - Renewable integration
- Transportation fuels
  - Oil refineries
  - CNG/RNG fueling stations
- Gas delivered to customers via extensive gas infrastructure

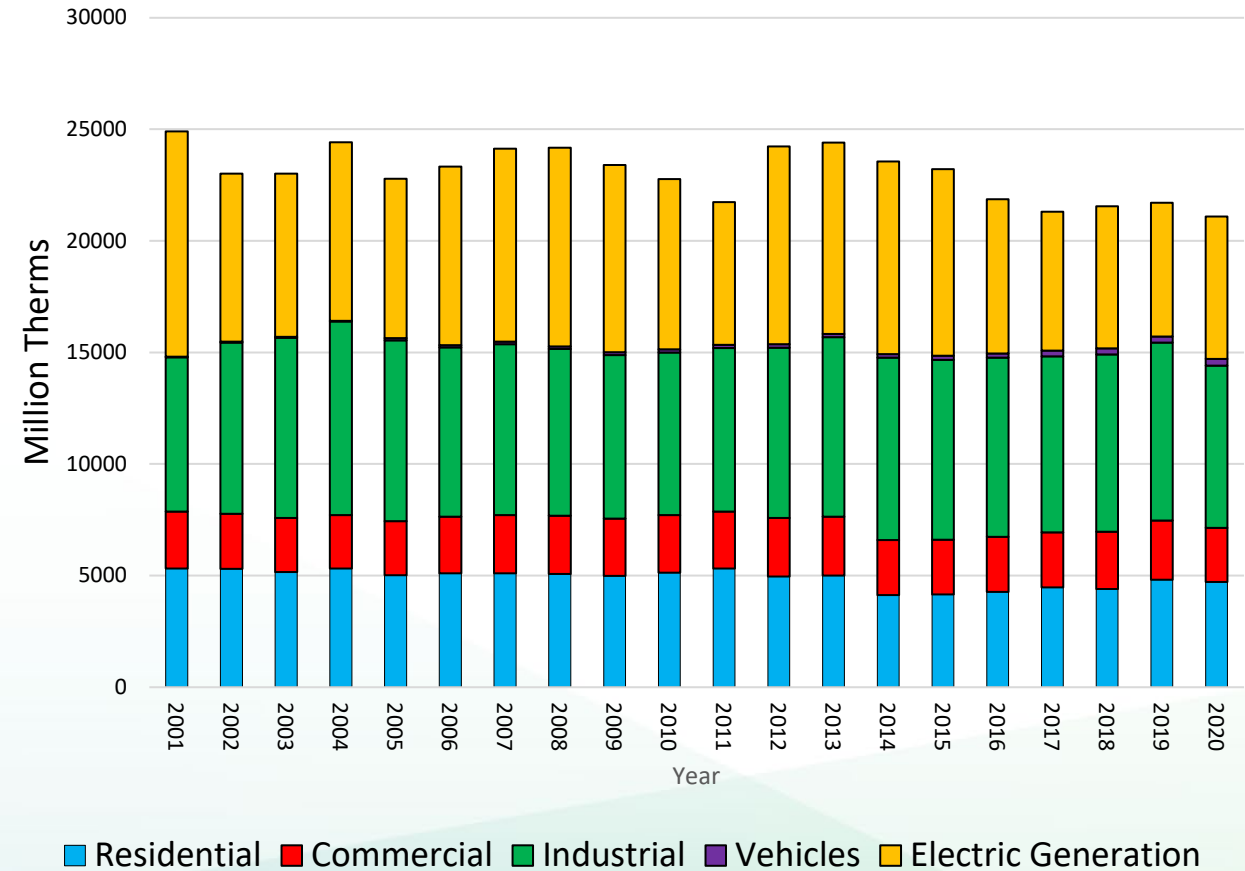


Images courtesy of the CEC, energystar.gov, Sacramento State University, National Park Service, UC Davis Medical Center, and CA Department of Industrial Relations.



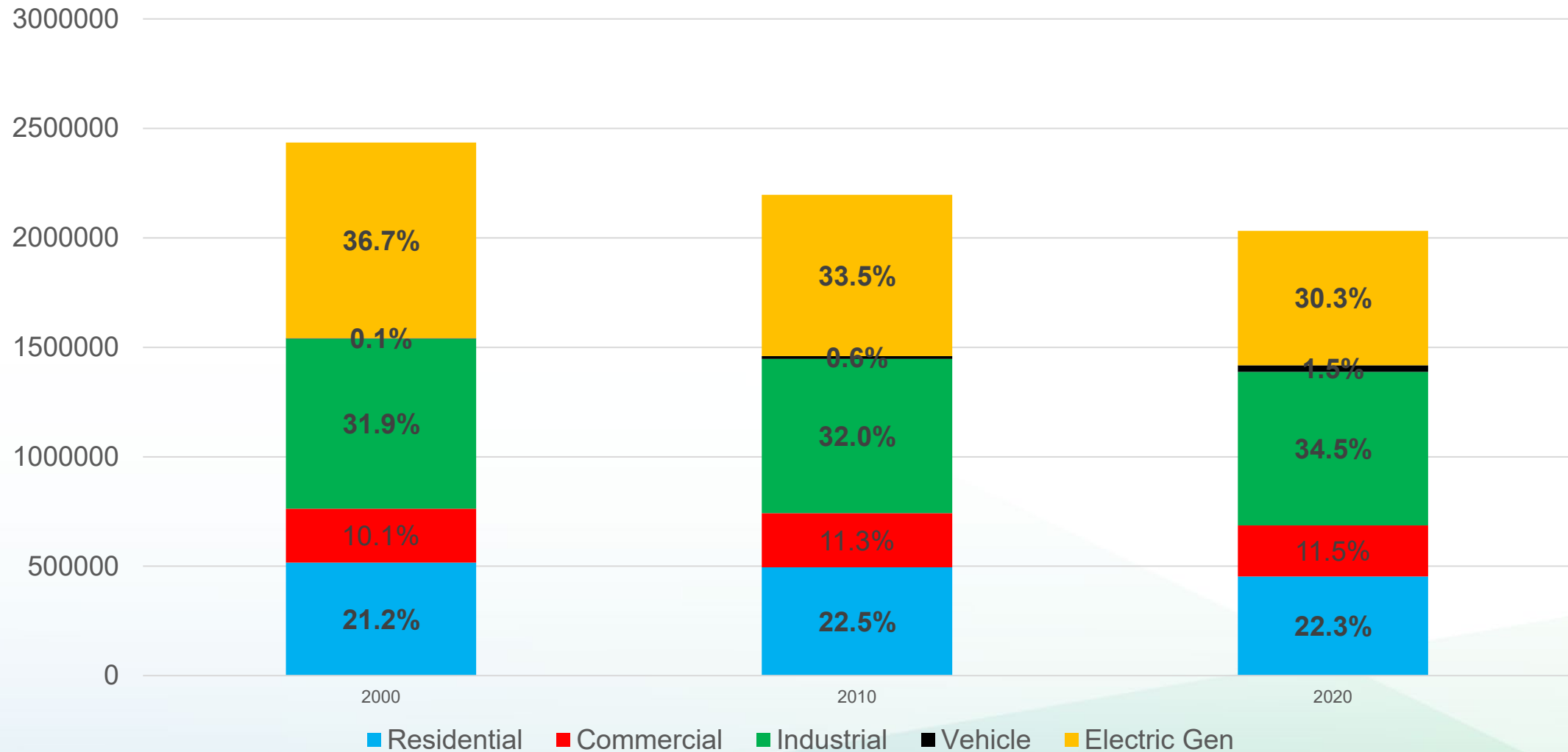
# California Natural Gas Consumption Estimates (MM Therms)

- Annual gas demand varies from year to year depending on weather and economic conditions
- EG gas demand varies the most with weather and hydro conditions
- Non-EG demand relatively flat over the last two decades
- 2020 dip in industrial demand with COVID as refining was down



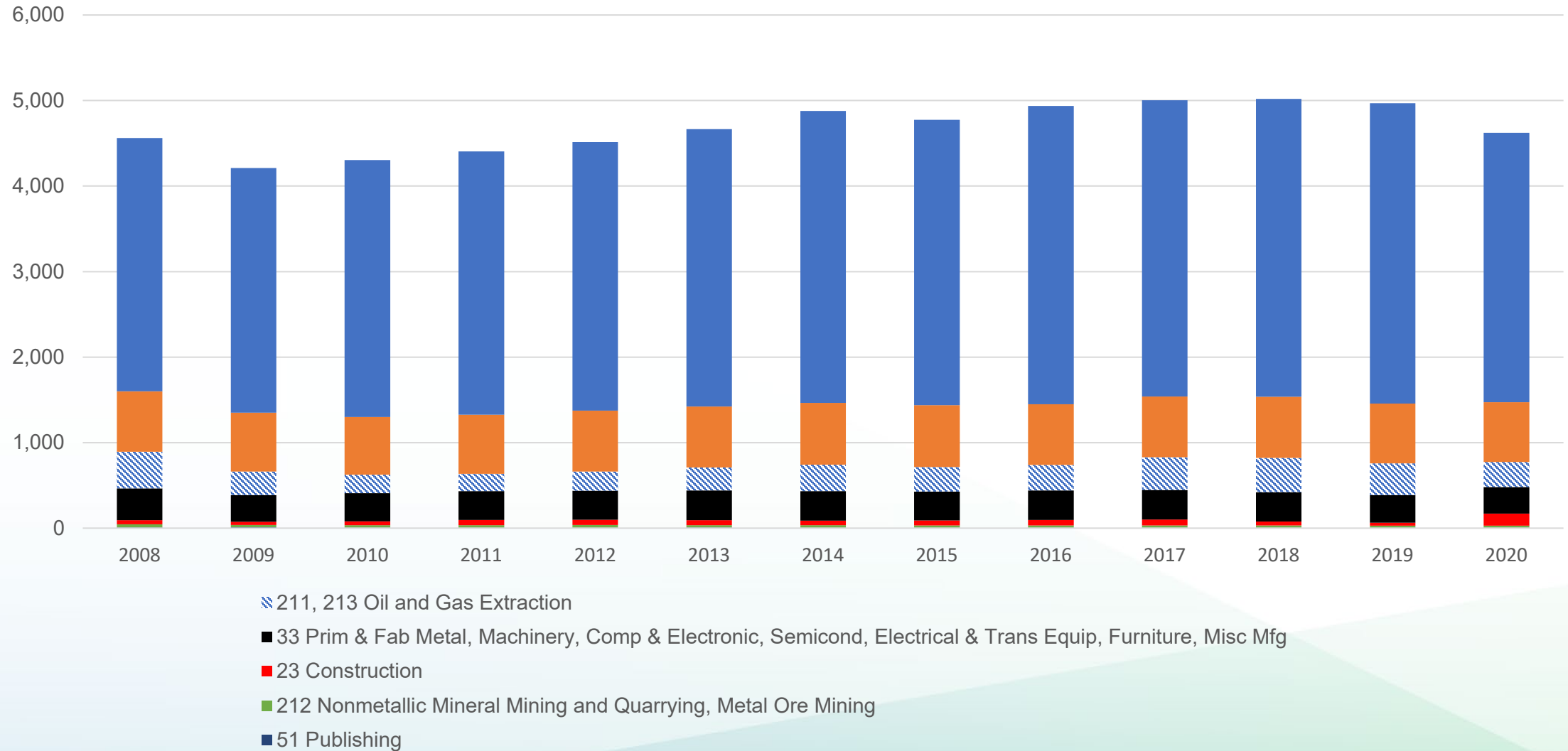


# California Natural Gas Consumption





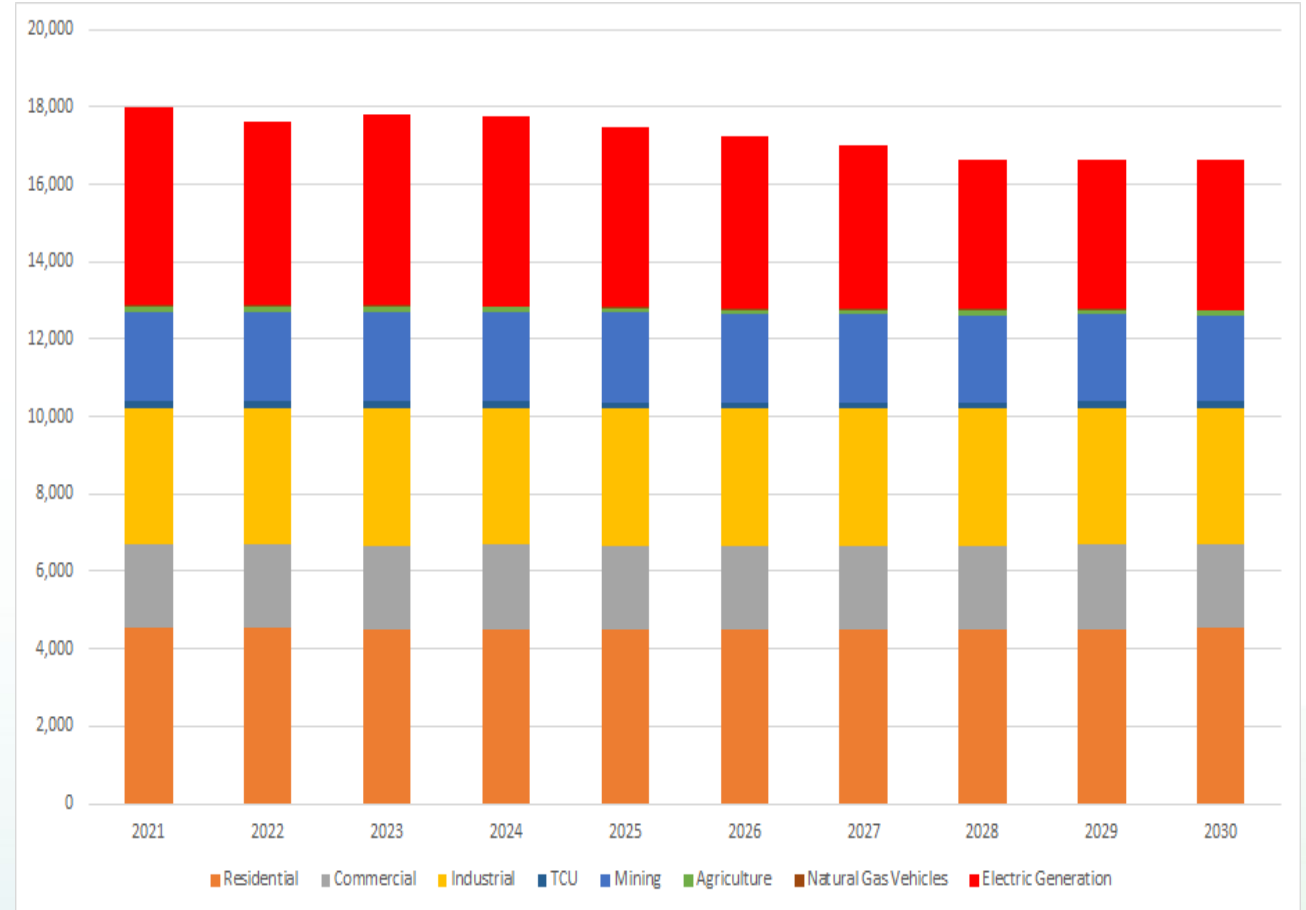
# Industrial Demand by High-Level NAICS Subsectors (MMTherms)





# California Gas Demand 2020 - 2030 Baseline Forecast (MMTherms)

- CEC 2019 IEPR Forecast shows slight decline for residential commercial and industrial through 2030
- CEC Plexos modeling shows declining EG demand
- PG&E and SoCalGas forecasting decline of about 1% per year
- Industrial & Mining ranges from 31% to 33% of total gas demand





**Thank You!**

