

DOCKETED	
Docket Number:	18-IEPR-04
Project Title:	Energy Demand Forecast Update
TN #:	226029
Document Title:	CEDU 2018 PLANNING AREA RESULTS
Description:	Presentation by Cary Garcia, Energy Commission
Filer:	Raquel Kravitz
Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	12/6/2018 7:51:46 AM
Docketed Date:	12/6/2018

California Energy Demand Update 2018

2018 Integrated Energy Policy Report Update
December 6, 2018



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Energy Assessments Division
California Energy Commission



CEDU 2018 PLANNING AREA RESULTS



PG&E Planning Area

Driver	CED 2017 Mid	CEDU 2018 Mid
Per Capita Income	1.73%	1.74%
Households	0.81%	0.70%
Manufacturing Output	2.79%	2.65%
Commercial Employment	0.82%	0.61%

Results

- **Baseline Consumption** continues sees continued growth driven by residential sector
- **Baseline Sales** growth declines slightly growing at 0.76% leading to continued decline in managed sales growth



PG&E Consumption

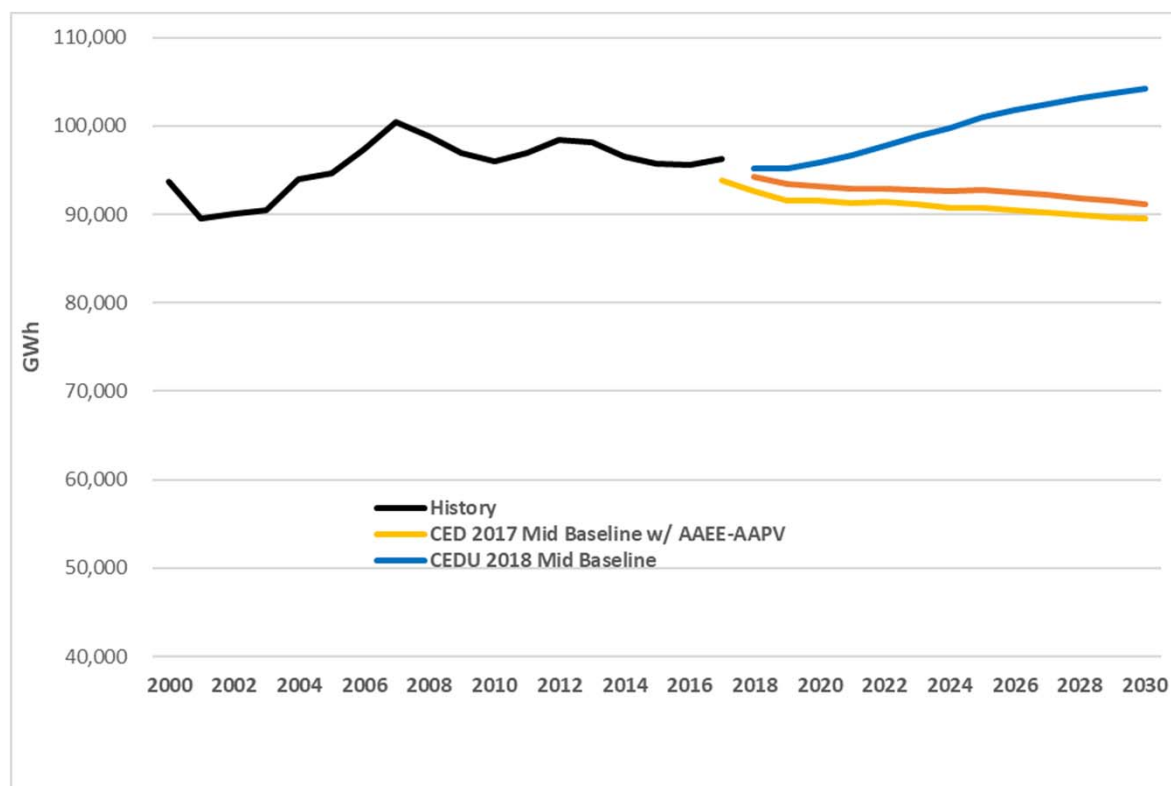
- **Baseline total consumption grows at slightly higher at 1.35% driven by residential sector**
- **Per capita income remains strong along with increasing persons per household**

Sector	CED 2017 Mid	CEDU 2018 Mid
Residential	2.12%	2.30%
Commercial	1.50%	1.23%
Industrial	0.27%	0.06%
Agricultural	0.01%	0.69%



PG&E Managed Sales

- Managed sales includes the effects of AAEE and AAPV
- Decreasing growth of .3% annually





SCE Planning Area

Driver	CED 2017 Mid	CEDU 2018 Mid
Per Capita Income	1.76%	1.62%
Households	0.89%	0.79%
Manufacturing Output	2.42%	2.29%
Commercial Employment	0.64%	0.43%

Results

- **Baseline Consumption** growth is unchanged at 1.3%
- **Baseline Sales** also remains close to CED 2017 at 0.85%



SCE Consumption

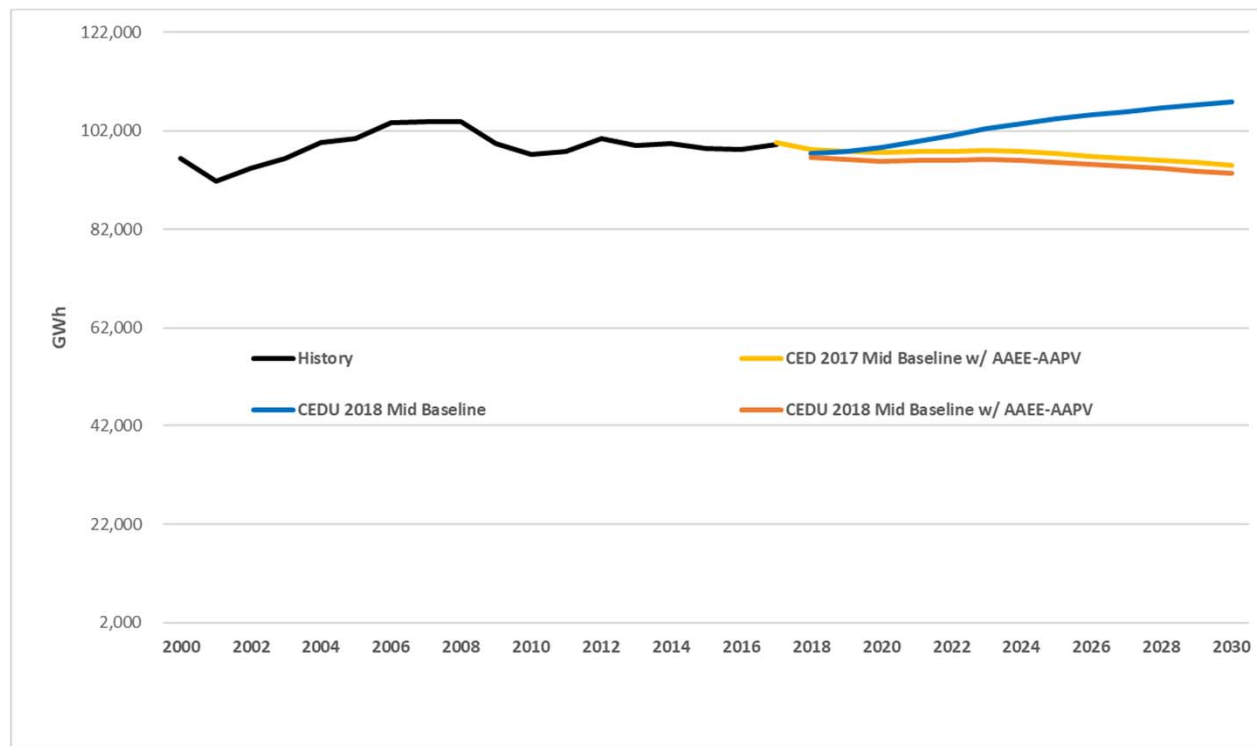
- Increasing persons per household drives residential consumption while commercial consumption declines due decrease in commercial employment
- Growth remains the same at 1.3%

Sector	CED 2017 Mid	CEDU 2018 Mid
Residential	2.21%	2.36%
Commercial	1.26%	1.05%
Industrial	0.50%	0.20%
Agricultural	0.46%	0.55%



SCE Managed Sales

- Similar consumption along with no change in PV results in baseline sales growth matching 2017 at 0.85%
- Managed sales grows at -0.3% annually





SDG&E Planning Area

Driver	CED 2017 Mid	CEDU 2018 Mid
Per Capita Income	1.73%	1.74%
Households	0.81%	0.70%
Manufacturing Output	2.79%	2.65%
Commercial Employment	0.82%	0.61%

Results

- **Baseline Consumption** increased slightly in the residential sector but is matched by commercial sector decline
- **Baseline Sales** is primarily affected by changes to PV forecast given similar consumption projection



SDG&E Consumption

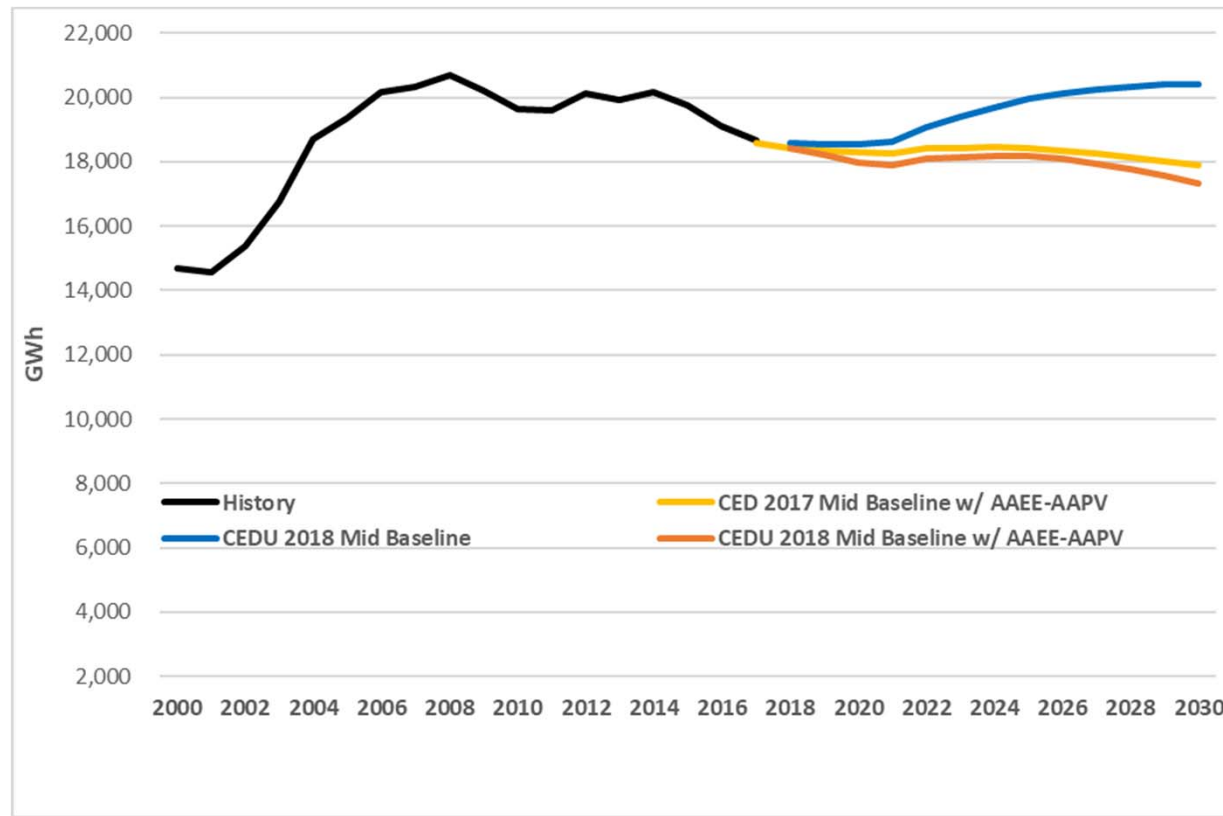
- Total consumption grows at 1.5% nearly matching 2017
- Residential sector sees increased growth while the commercial sector declines
- Decreasing commercial employment is driving the reduction in commercial sector

Sector	CED 2017 Mid	CEDU 2018 Mid
Residential	1.96%	2.23%
Commercial	1.52%	1.29%
Industrial	0.00%	-0.23%
Agricultural	0.61%	0.64%



SDG&E Managed Sales

Sales forecast is largely driven by increased PV adoption;
growth decreases by .25%





LADWP Planning Area

Driver	CED 2017 Mid	CEDU 2018 Mid
Per Capita Income	2.26%	1.90%
Households	0.68%	0.70%
Manufacturing Output	2.45%	2.32%
Commercial Employment	0.61%	0.42%

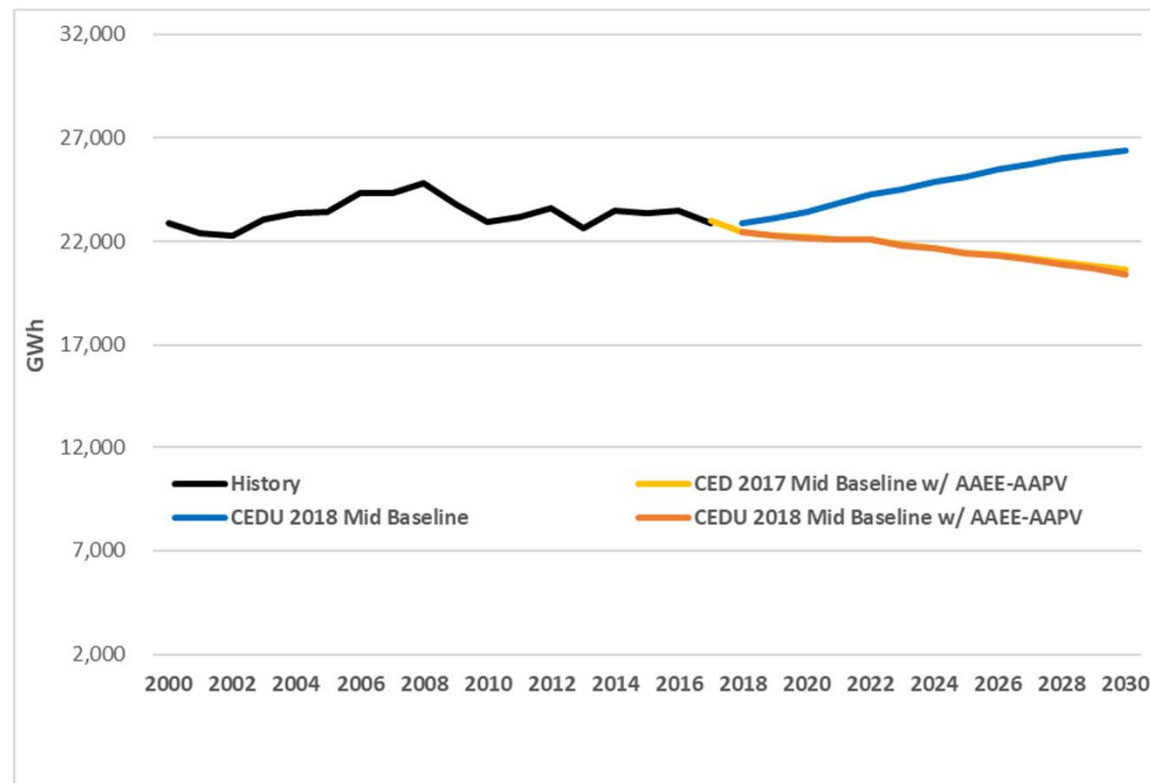
Results

- **Baseline Energy** sales growth is nearly the same as commercial sales decline while residential sales increase
- **Baseline Peak** growth increases slightly driven by residential consumption



LADWP Managed Sales

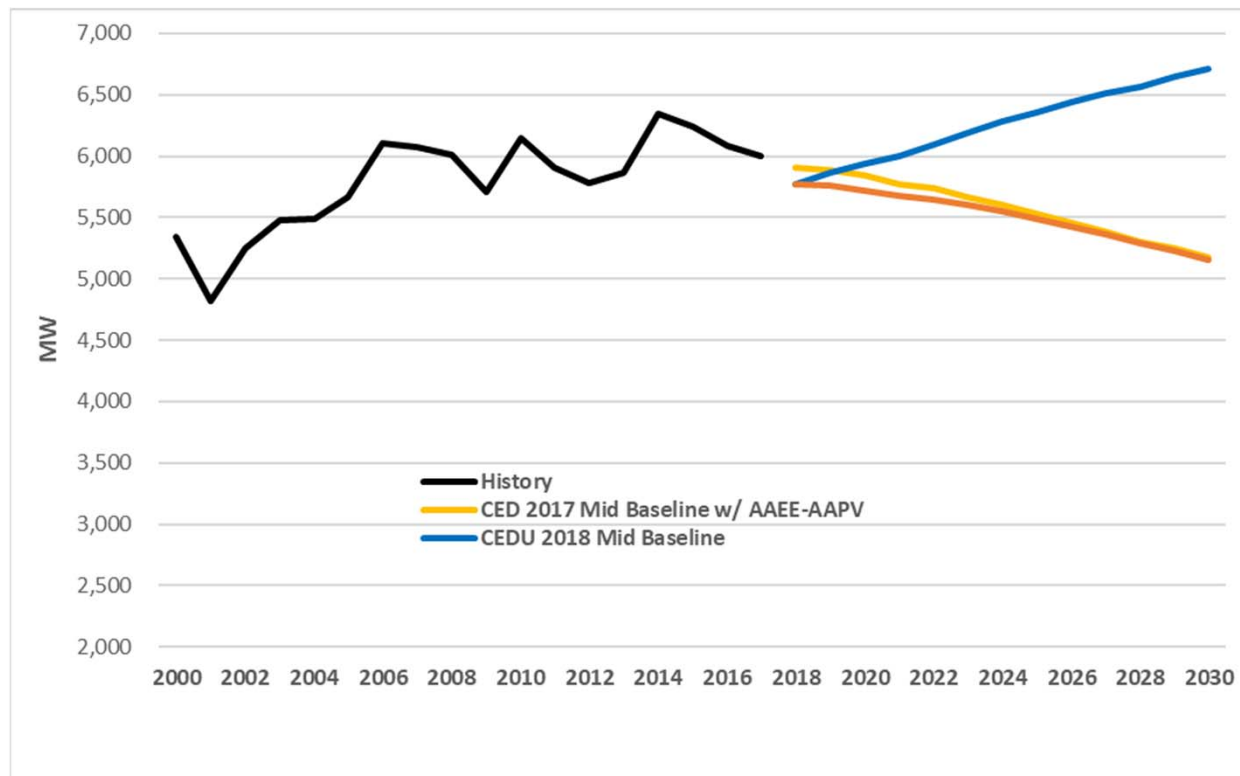
- Baseline sales grows at slightly slower 1.2%;
- Less decline in persons per household relative to 2017 helps drive residential consumption





LADWP Managed Peak

- Baseline peak demand grows at 1.3% slightly higher than 2017
- Residential consumption increase drives peak demand





SMUD Planning Area

Driver	CED 2017 Mid	CEDU 2018 Mid
Per Capita Income	1.87%	1.48%
Households	1.07%	1.08%
Manufacturing Output	2.70%	2.50%
Commercial Employment	0.85%	0.60%

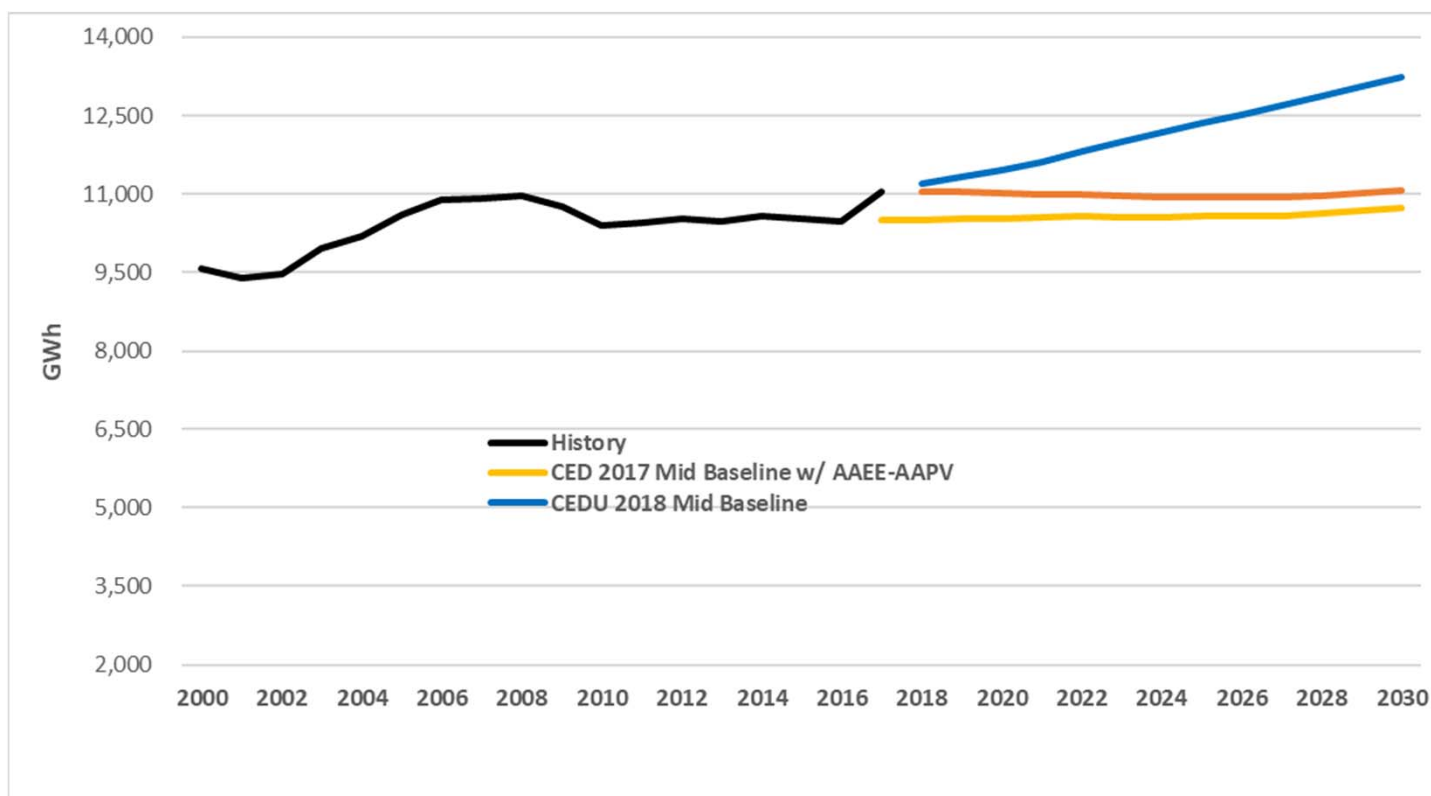
Results

- **Baseline Energy** sales growth reduced by .21% annually
- **Baseline Peak** growth decreased slightly and remains flat



SMUD Managed Sales

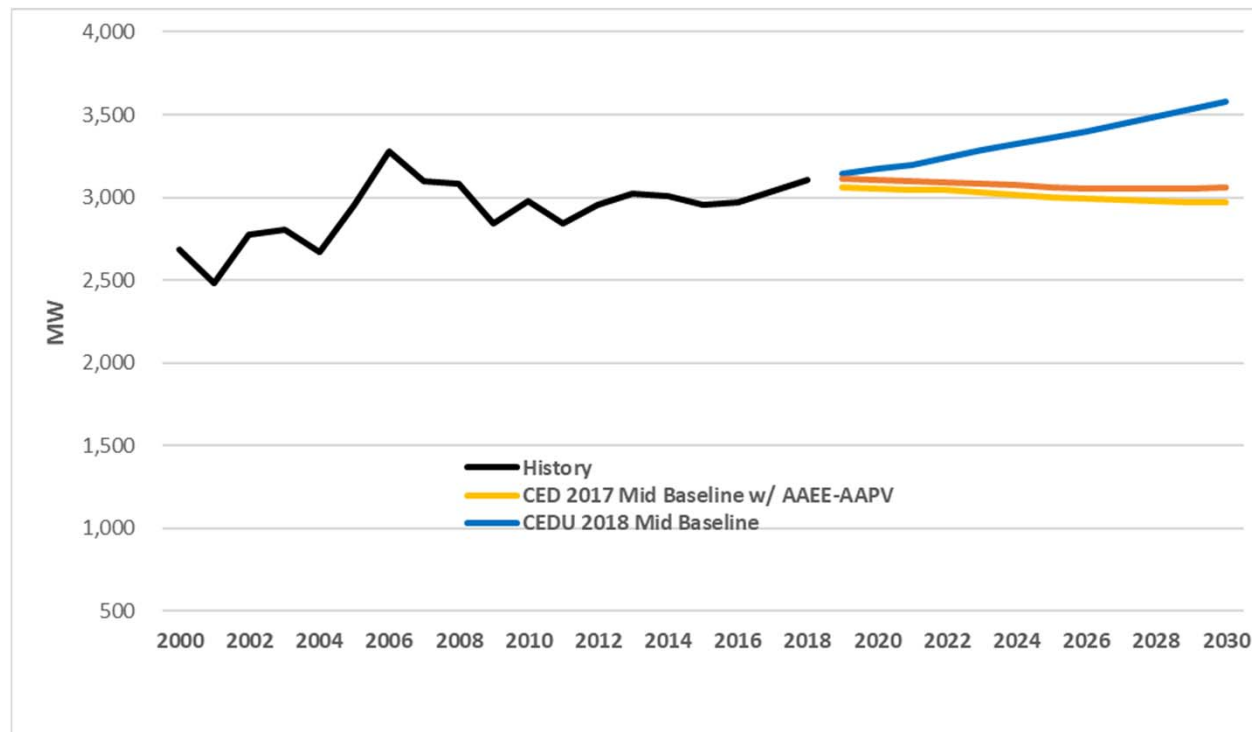
Higher starting point but slower growth at 1.4% due to decreases in commercial sector consumption and sales





SMUD Managed Peak

- Baseline peak demand grows at 1.2%
- Residential consumption which saw little decline





Questions



