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PG&E Data Center Forecasting

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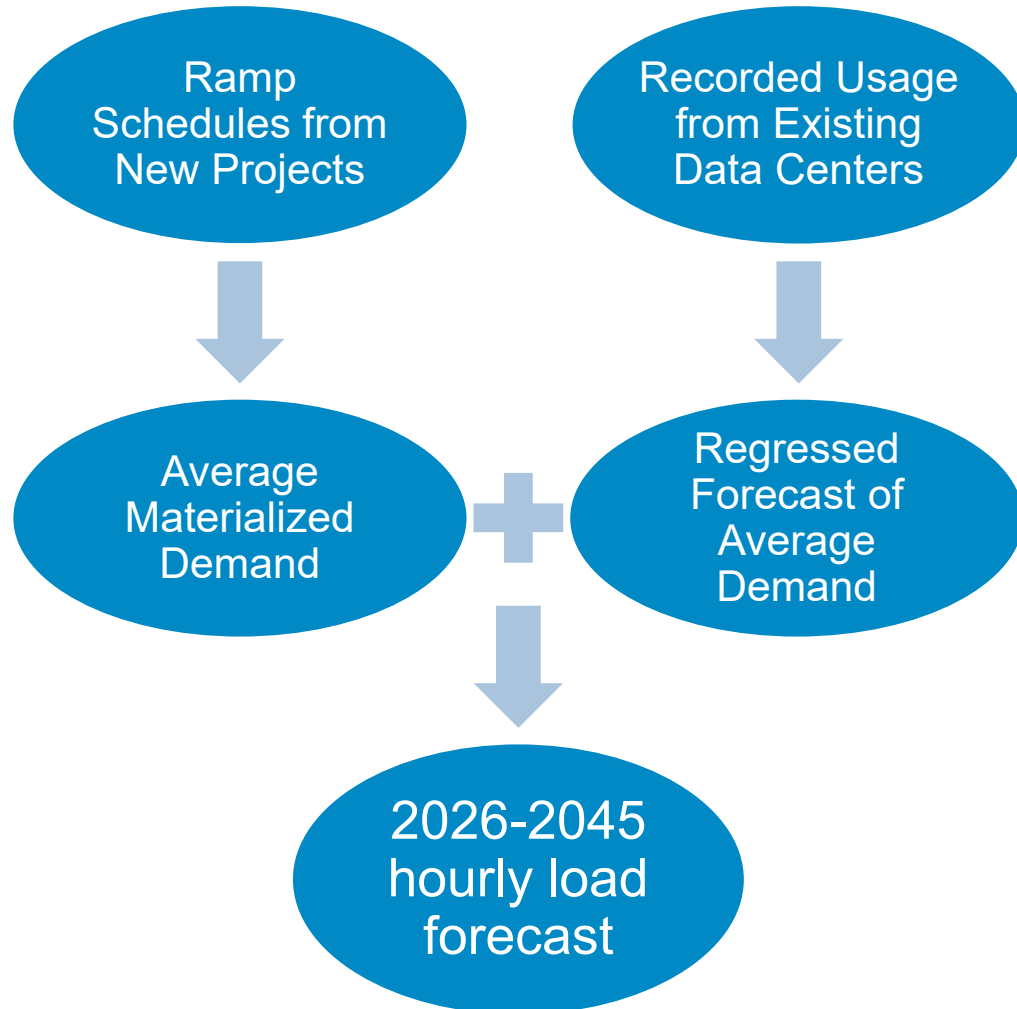


PG&E's Spring 2026 Data Center Forecast



Forecast Methodology: Spring 2026

PG&E produced an hourly load forecast for data centers through 2045 using data and assumptions derived from data centers already on PG&E's system, applications in the interconnection queue, and internal analysis.



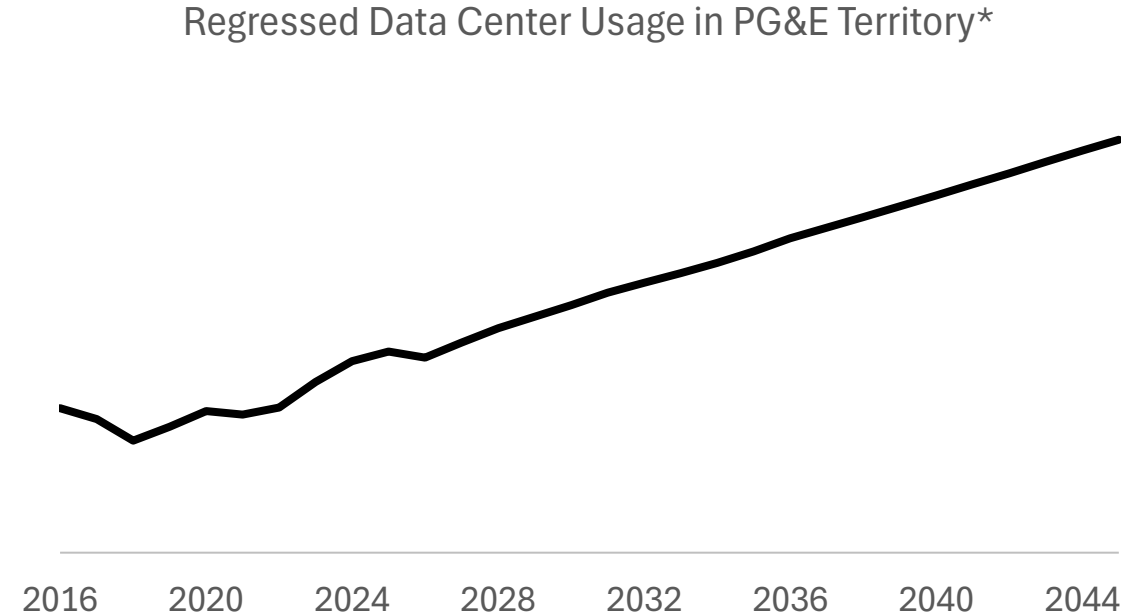
- Scope of forecast: large transmission and distribution-connected retail data centers
 - 2026-2045 annual GWh, peak MW, and hourly load
 - Assumes no non-emergency on-site generation, except from projects only seeking standby electric service
- Data Sources
 - Project tracker for data center applications in the large load study process
 - Database of existing data center projects and historical usage
- Assumptions informed by internal analysis and expert opinion
 - Capacity materialization and timing based on stage in interconnection queue
 - Capacity utilization
 - Load factor
 - Load shapes



Regression-Based Forecast Component

PG&E's database on existing data centers has enabled the development of a regression-based forecast that complements the pipeline-based forecast.

- PG&E's data center database tracks the load of existing data centers on PG&E's system
 - Composed of ~120 data centers
- Regression model developed using ~10 years of monthly load data
- Load from interconnection queue is added as incremental to 2025 to avoid double counting with regression results



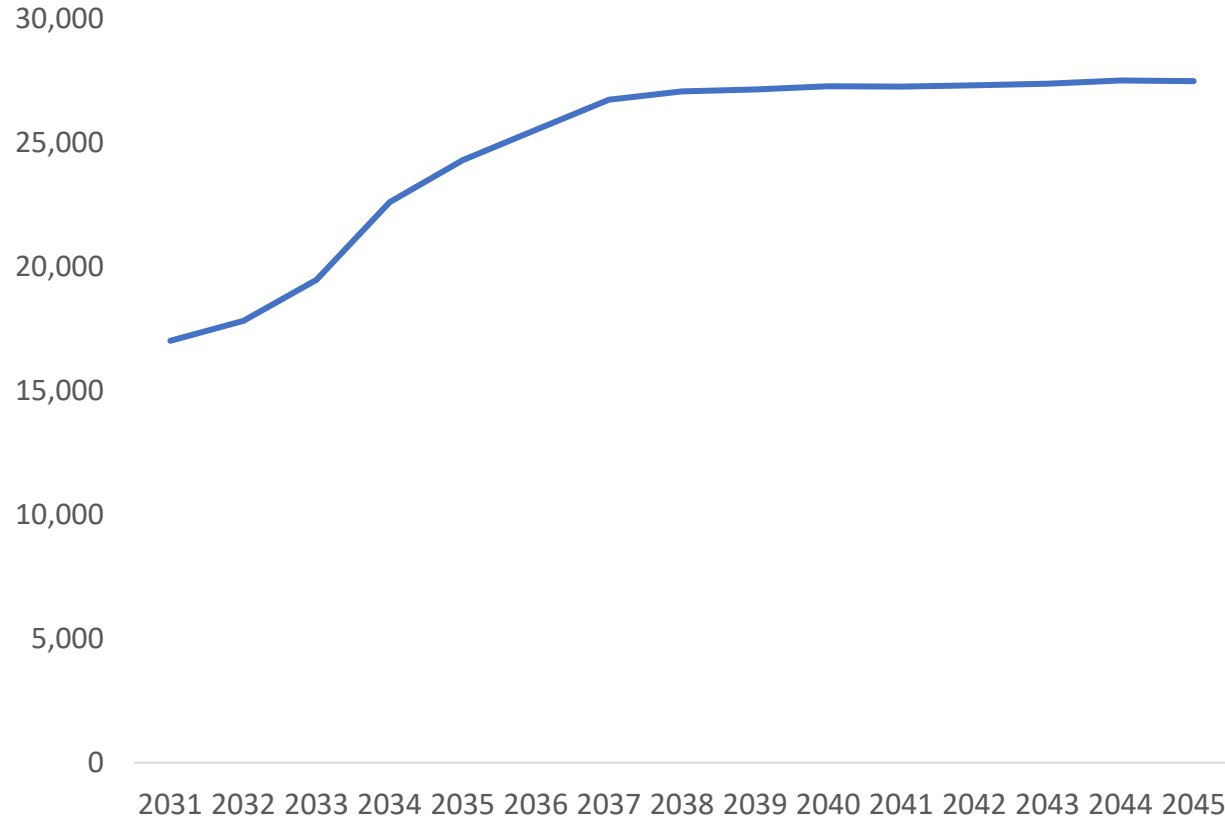
* Vertical axis values not shown due to customer privacy considerations. Vertical axis does not start at 0



Forecast Results: Spring 2026

PG&E forecasts 3 GW of new data center capacity will come online by 2031. Combined with load from existing data centers, this translates to 17,000 GWh of cumulative load.

Large Data Center Annual Sales, PG&E Service Area (GWh)



- PG&E's data center forecast ramps up through the mid-2030s and flattens out by 2038.
- Through 2027, existing projects make up the majority of load from large data centers. After 2027, new projects account for most of this load.

Approximate Percent of Load from Existing Large Data Centers

2026	75%
2027	60%
2030	10%
2035	7%

Future Forecast Improvement Ideas





Data Center Pipeline

The data center pipeline increased by almost 8 GW between March and June 2026, which reflects new projects received in the 2026 Cluster Study. PG&E anticipates reflecting updated definition of Final Engineering in future forecast vintages.

Data Center Pipeline			Pipeline Highlights	
MW	March 2026	June 2026	▶ Application received and signed ▶ Preliminary Engineering Study (PES) fee paid ▶ 26 projects as of 6/30/26	
Total	5,090	12,710		
Application & Preliminary Engineering	1,700	8,200		
Final Engineering	3,110	3,880	▶ Work Performance Agreement (WPA) signed ▶ WPA payment received covering design activities and procurement ▶ 23 projects as of 6/30/26	
Interconnection Construction Agreement	140	490		
Construction	140	140	▶ Interconnection Construction Agreement executed ▶ 4 projects as of 6/30/26	

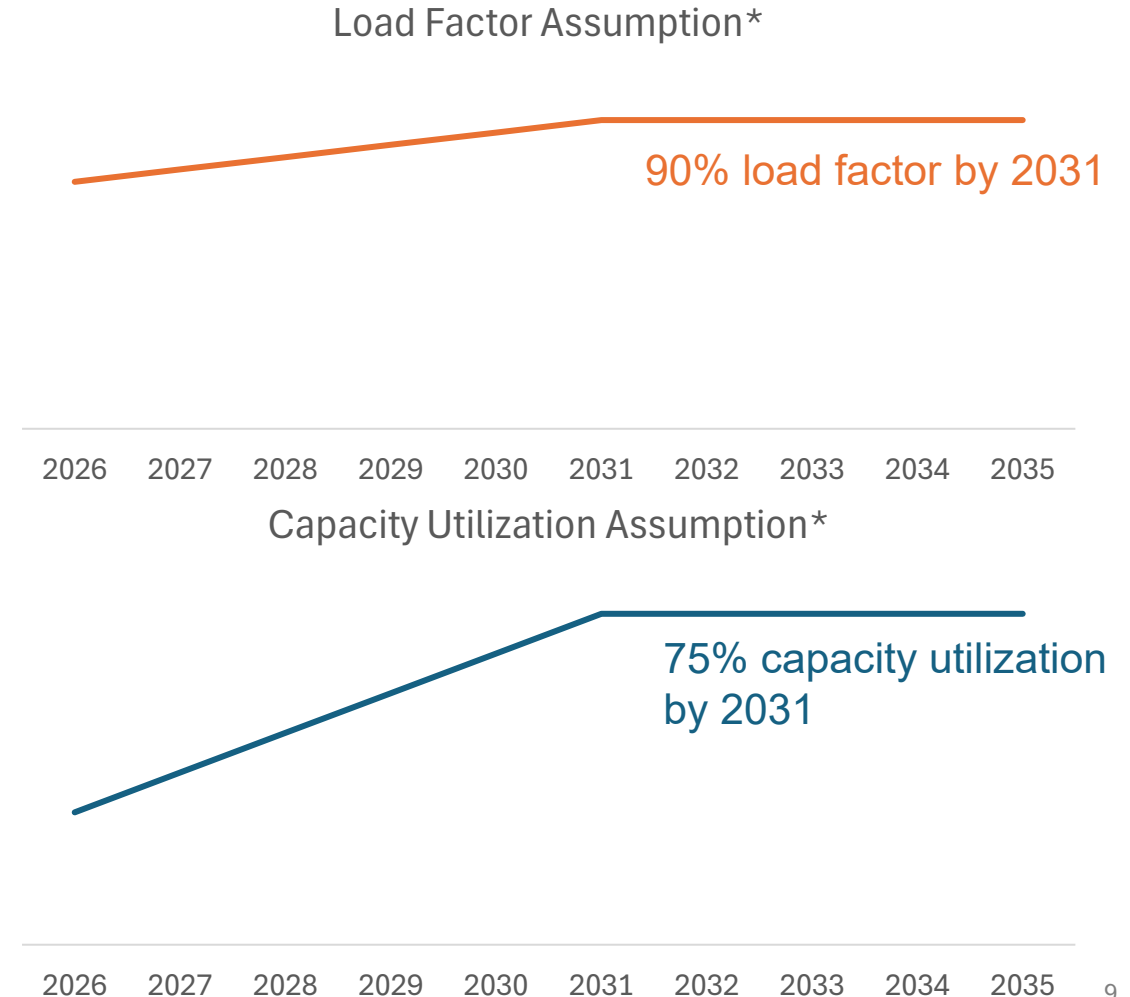
- New definition for Final Engineering (from signed PES to signed WPA) reflects higher financial commitment from the customer



Utilization Assumptions

PG&E is evaluating additional ideas to improve forecast accuracy by revising assumptions around capacity utilization and load factor in the Fall 2026 Data Center Forecast and beyond.

- Updating assumptions using PG&E's existing data center database – anticipating lowering assumptions in near-term
- Load factor calculated on all large data centers
- Capacity utilization analysis on small subset of data centers for which we have both materialized load data and capacity from applications



* y-axis does not start at 0

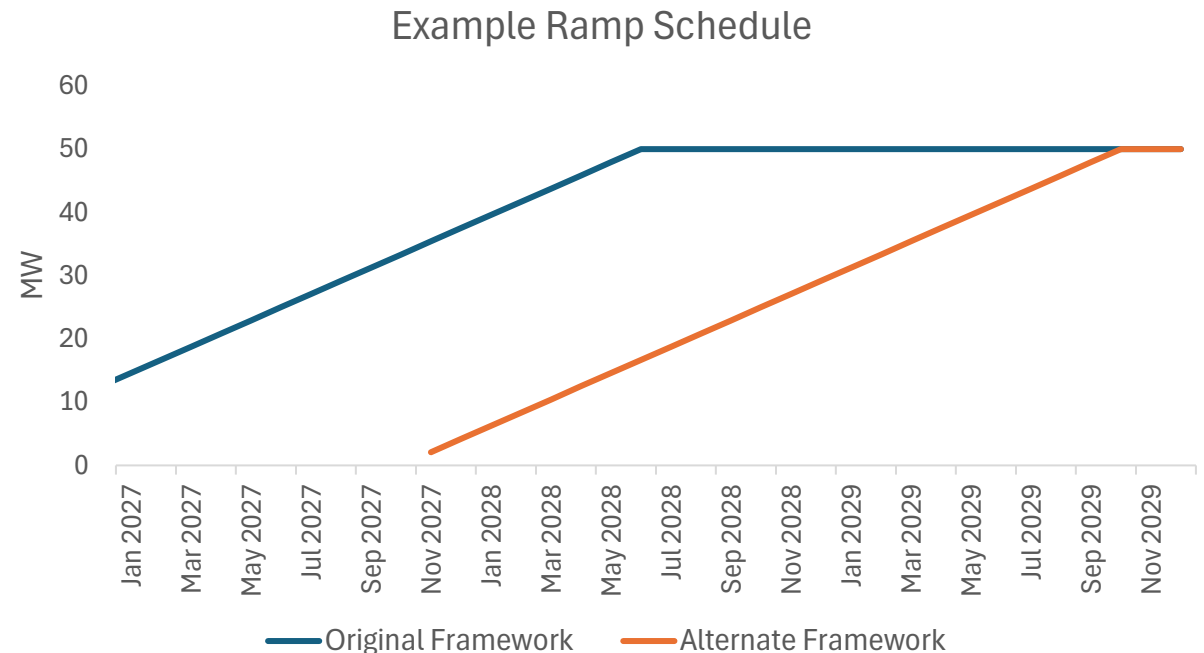
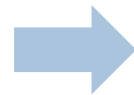
Ramping Assumption Update

Incorporating month-specific energization dates with a 12-month ramp-up changes the timing of load growth in the forecast horizon.

- Ramp schedules from customer applications or PG&E's engineering teams are at the annual level
- Original Framework: Assume a project's incremental capacity fully comes online in a given calendar year
- Alternate Framework: Integrate month-specific energization dates and assume incremental capacity takes 12 months to come online from the project energization date

Example Ramp Schedule	
2027	25 MW
2028	50 MW

Energization Date: Nov 2027



Questions?

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