<Limited-Disclosure>

WECC

# Western Assessment of Resource Adequacy

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Spring 2026 Joint CREPC-WIRAB Meeting

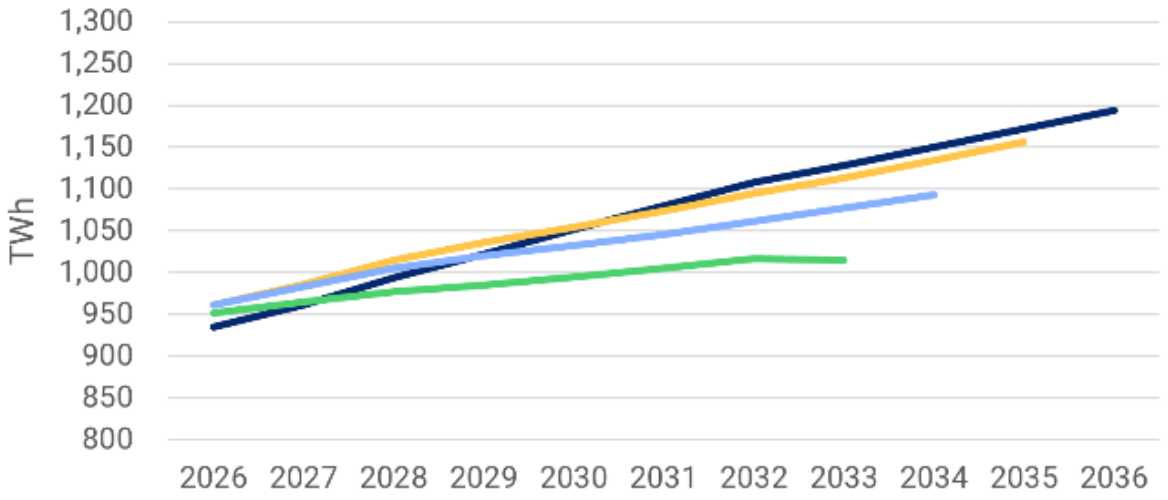
**Electric Reliability & Security for the West**

May 12, 2026

- Demand Forecasts
- Planned Additions
- Planned Retirements
- Resource Mix
- Resource Scenarios
- Load Scenarios
- Links to Material

# Demand Forecasts

## Annual Demand Projections




## Peak Demand Projections

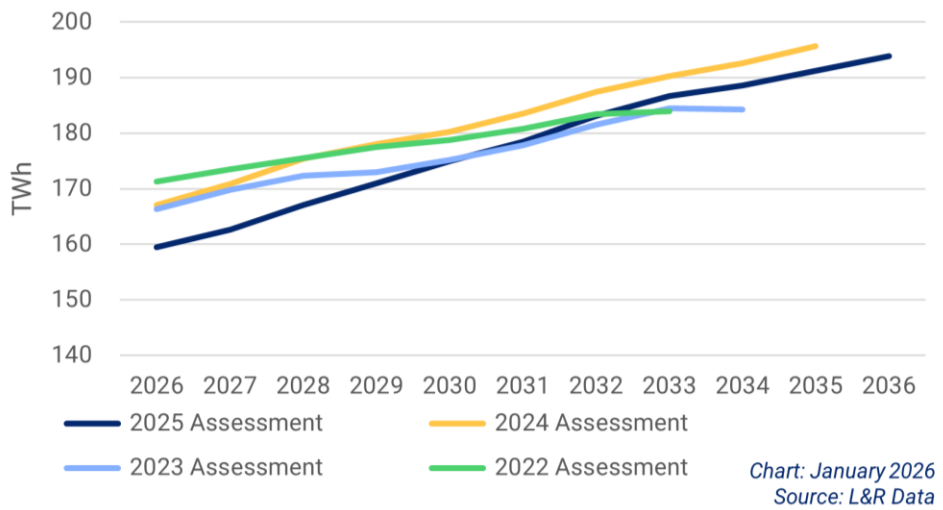



*Chart: January 2026*
*Source: L&R Data*

| Subregion | 10-year Demand Growth Projection | Average Annual Growth Rate |
|---|---|---|
| Alberta | 8 TWh (9%) | 1% |
| Basin | 20 TWh (26%) | 2% |
| British Columbia | 5.5 TWh (8%) | 1% |
| California | 69 TWh (26%) | 2% |
| Mexico | 9 TWh (45%) | 4% |
| Northwest | 47 TWh (24%) | 2% |
| Rocky Mountain | 21 TWh (27%) | 2% |
| Southwest | 67 TWh (42%) | 4% |

| Subregion | 10-year Peak Demand Growth Projection | Average Annual Growth Rate |
|---|---|---|
| Alberta | 1 GW (8%) | 1% |
| Basin | 3 GW (18%) | 2% |
| British Columbia | .4 GW (3%) | .3% |
| California | 12 GW (21%) | 2% |
| Mexico | 1.6 GW (41%) | 4% |
| Northwest | 7 GW (21%) | 2% |
| Rocky Mountain | 3 GW (23%) | 2% |
| Southwest | 10 GW (29%) | 3% |

# Planned Additions

## Historical and Planned Additions

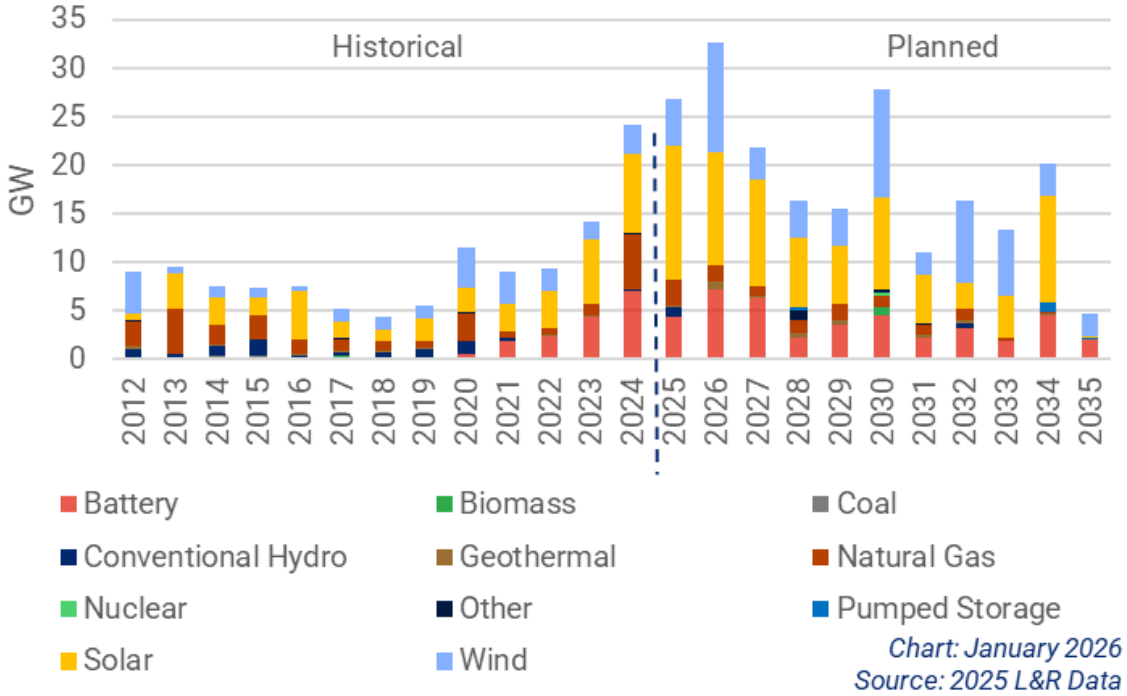



*Chart: January 2026*
*Source: 2025 L&R Data*

- 177 GW from 2026-2035
- 90% is inverter-based resources (battery, solar, wind)
- 70% are variable energy resources (solar & wind)

## Planned Additions by Subregion

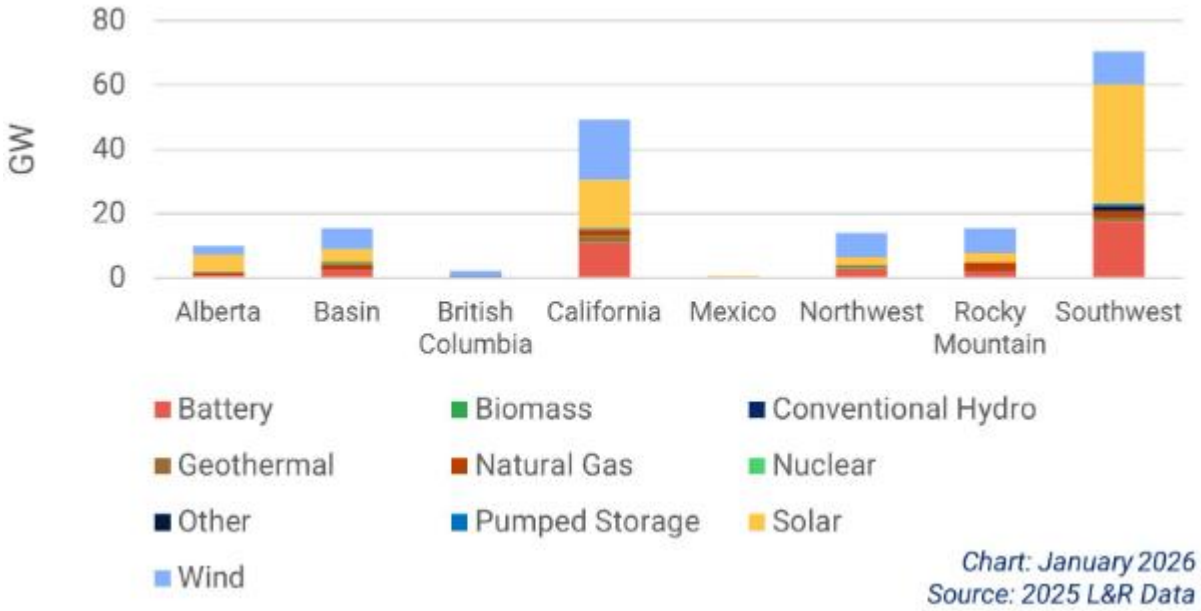
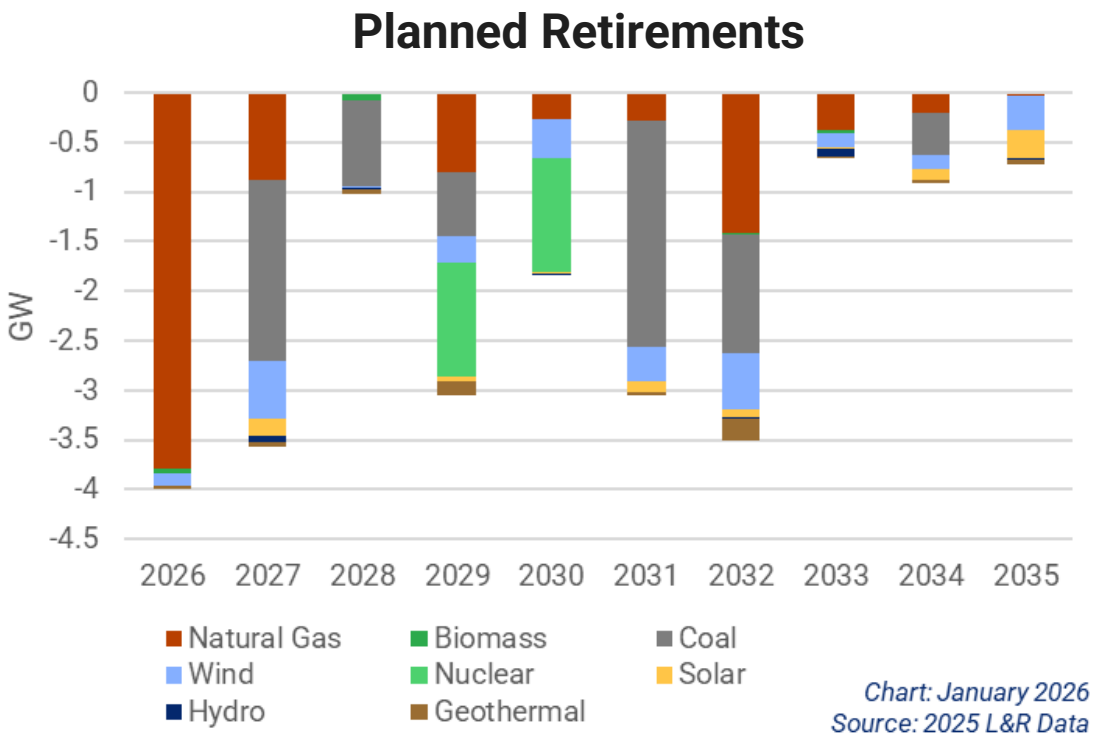
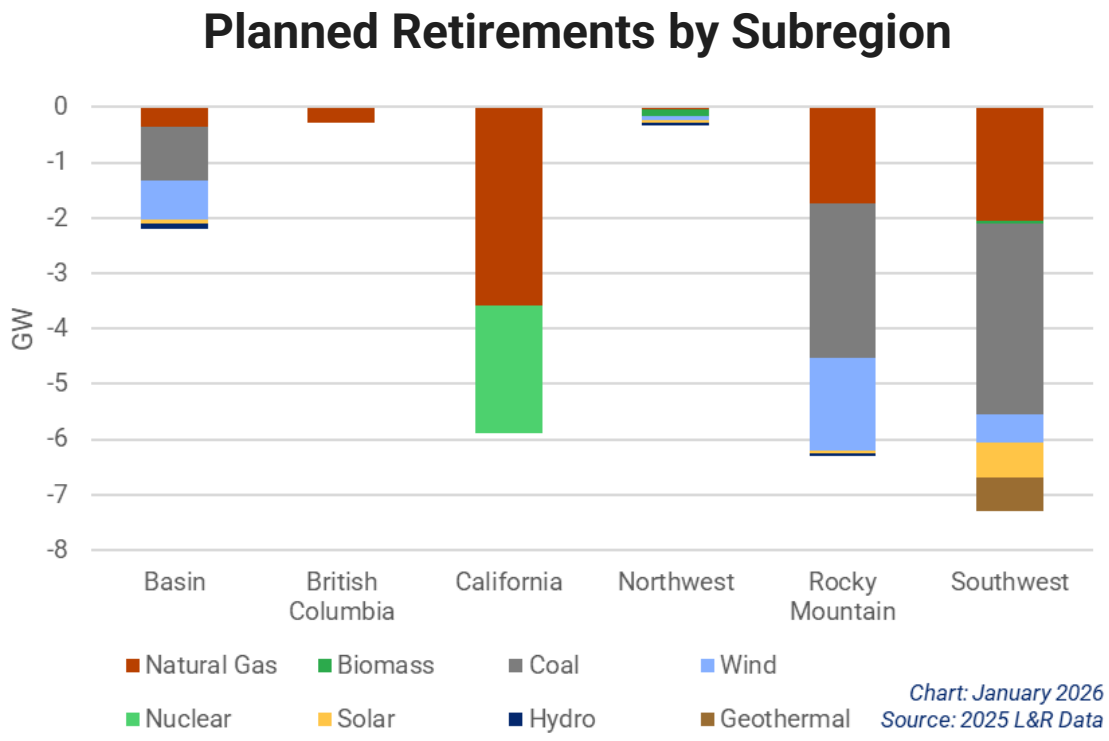



*Chart: January 2026*
*Source: 2025 L&R Data*

- 119 GW of resource additions are in California and the Southwest
- 15 GW of additions in Basin, the Northwest, and Rocky Mountain
- 13 GW of additions in Alberta, British Columbia, and Mexico

# Planned Retirements




- 22 GW from 2026–2035
- 80% is natural gas, coal, or nuclear

- 7 GW in the Southwest
- 6 GW in California and Rocky Mountain

# Resource Mix

## Year-End 2024

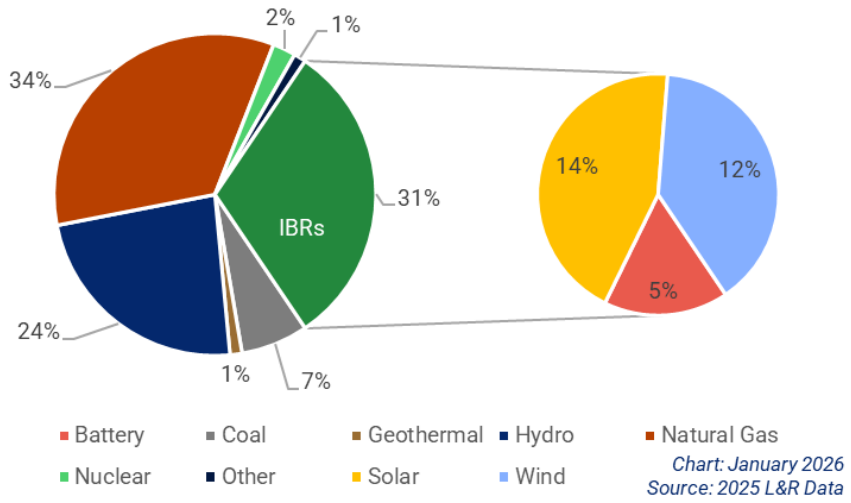



*Chart: January 2026*
*Source: 2025 L&R Data*

## Projected Year-End 2035

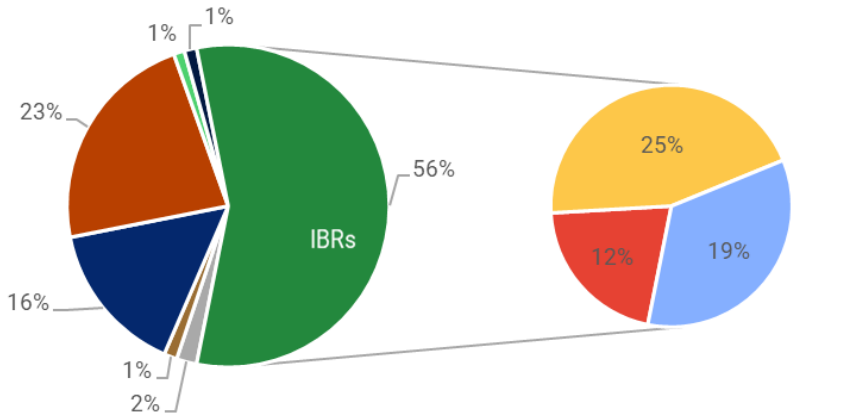



*Chart: January 2026*
*Source: 2025 L&R Data*

## Comparison of Nameplate Capacity to Available Energy

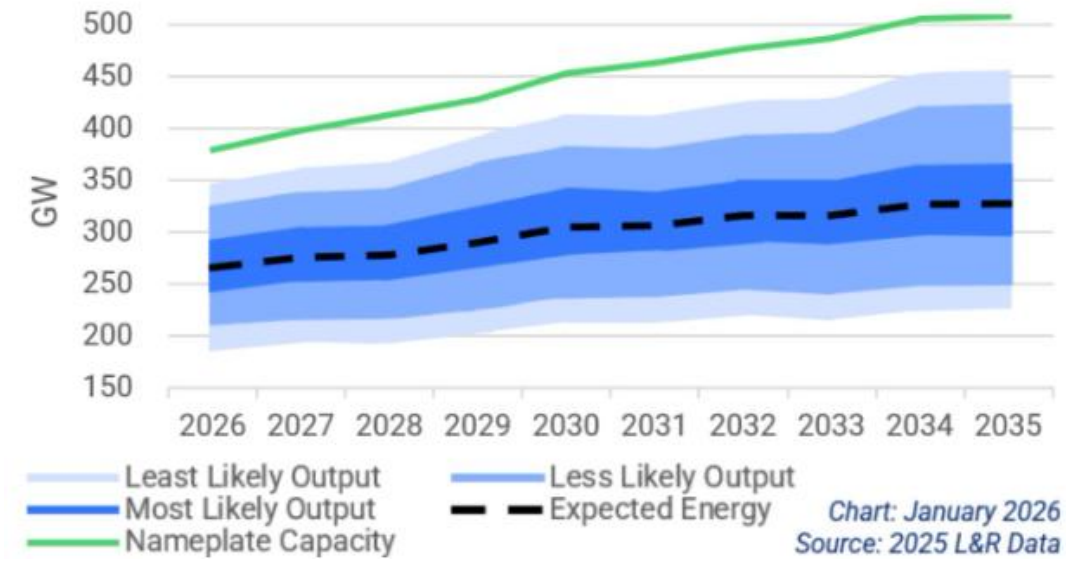
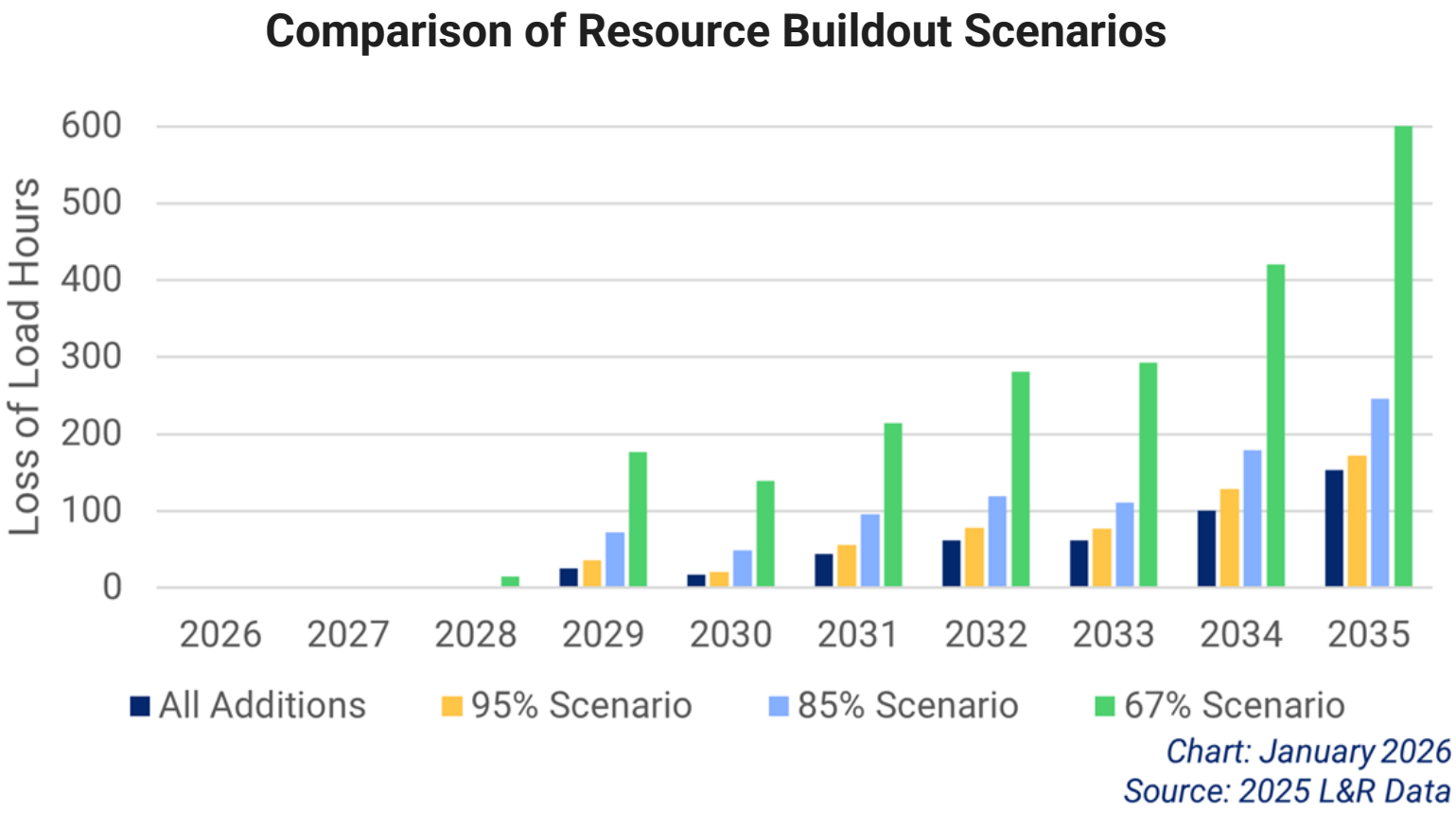



*Chart: January 2026*
*Source: 2025 L&R Data*

# Resource Scenarios



Even with all planned resource additions, loss of load is encountered.

# Load Scenarios (2030 and 2035)

## Comparison of Load Scenarios

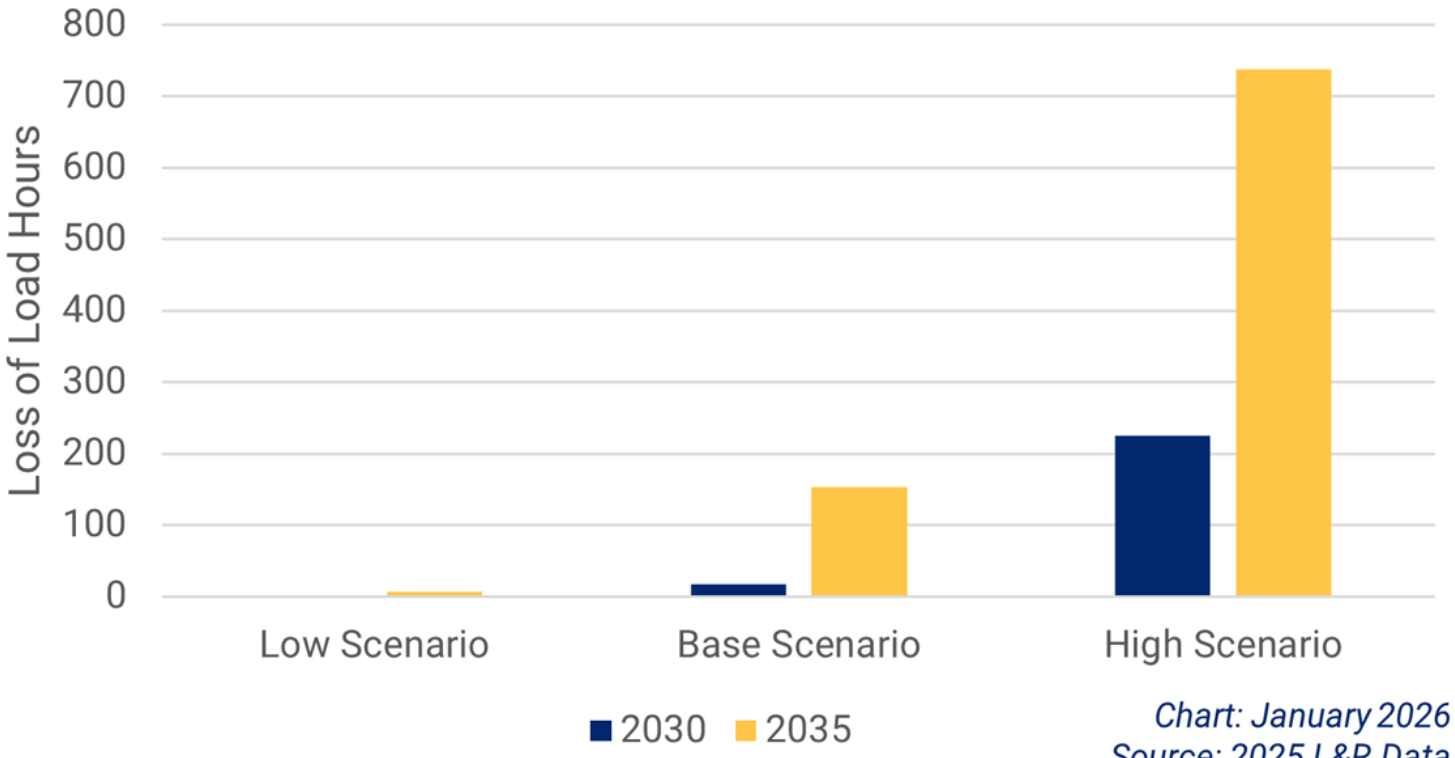



*Chart: January 2026*
*Source: 2025 L&R Data*

## High Load Scenario

| Incremental Net Energy Added to Load Forecast (GWH) | | |
|---|---|---|
| Region | 2030 | 2035 |
| Alberta | 13,315 | 17,476 |
| California | - | 876 |
| Northwest | 27,484 | 30,774 |
| Rocky Mountain | 5,231 | 6,336 |
| Southwest | 27,028 | 33,273 |
| Total | **73,058** | **88,736** |

## Low Load Scenario

| Summer Peak | | Winter Peak | | Annual Demand | |
|---|---|---|---|---|---|
| 2030 | 2035 | 2030 | 2035 | 2030 | 2035 |
| -2.5% | -5.0% | -5.0% | -10% | -5.0% | -10% |

Even with all planned resource additions **and** a reduction in demand, loss of load is encountered in the Northwest subregion.

# 2025 Western Assessment Takeaways

- Demand forecasts are changing drastically from year to year
- Unprecedented amounts of planned generation over the next decade
- Variability increasing with the addition of energy-limited resources and retirement of coal, natural gas, and nuclear
- With demand growth, new resource delays and cancellations will create serious resource adequacy challenges

# Western Assessment Material

- 2025 Western Assessment of Resource Adequacy
- Western Assessment Supplemental Material
- Western Assessment of Resource Adequacy Modeling Approach
- Western Assessment Glossary

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