

## NATIONAL AND GLOBAL NEWS

The U.S. International Trade Commission sided with Suniva and SolarWorld in a 4-0 vote on Friday to find that imports of cheap solar panels have caused injury to domestic solar manufacturers, setting up a high-stakes tariff decision for the federal administration. Solar installers have generally opposed ITC appeal.

The International Energy Agency reported that solar energy was the fastest-growing source of electric power in 2016, accounting for almost two-thirds of newly installed net capacity globally.

Continuing the electric car announcements by automakers, General Motors said that it would release two new electric vehicles within the next 18 months, and twenty by 2024. GM's chief of product developments said that the future would be all electric, but did not say how long the transition would take.



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## Local and Regional Energy News

There is concern among Washington state environmental organizations that there might be two carbon tax initiatives on the ballot in 2018. The Alliance for Jobs and Clean Energy refrained from pushing its tax policy in 2016 because Initiative 732 was further along the development and signature gathering pathways. The Alliance has developed a carbon tax proposal with broad environmental and social support for 2018, but wants to avoid competing initiatives. The alternative carbon tax initiative is being considered by the Quinault Indian Nation.

Washington State on Tuesday rejected a key permit needed for a proposed terminal to export coal to Asia, another blow to companies eager to sell Wyoming and Montana coal to Asian markets. Washington's Department of Ecology rejected a water quality permit for the Millennium Coal Terminal, one of several permits sought by the company to build what

would be the largest coal export terminal in the United States.

Portland General Electric became the fifth western utility outside of California to officially connect to the Energy Imbalance Market (EIM), on Oct. 1. The EIM is managed by the California ISO.

The U.S. Climate Alliance increased to 15 states with the addition of North Carolina.



# Energy Price Overview



## River & Snow Pack Info

Observed September stream flow at The Dalles: 95% of average.

Observed September precipitation above The Dalles: 101% of average.

Est. 2017 Final runoff at The Dalles (Jan.—August): 137.9 million acre-feet, 136% of normal

Estimated regional snow-pack: N/A

Federal hydropower generation in August 5,889 aMW, 2012-2016 average: 6,527 aMW.

Reservoir content (Libby, Hungry Horse, Grand Coulee, Dworshak): August 82.9%, 5-year average: 82.3%.

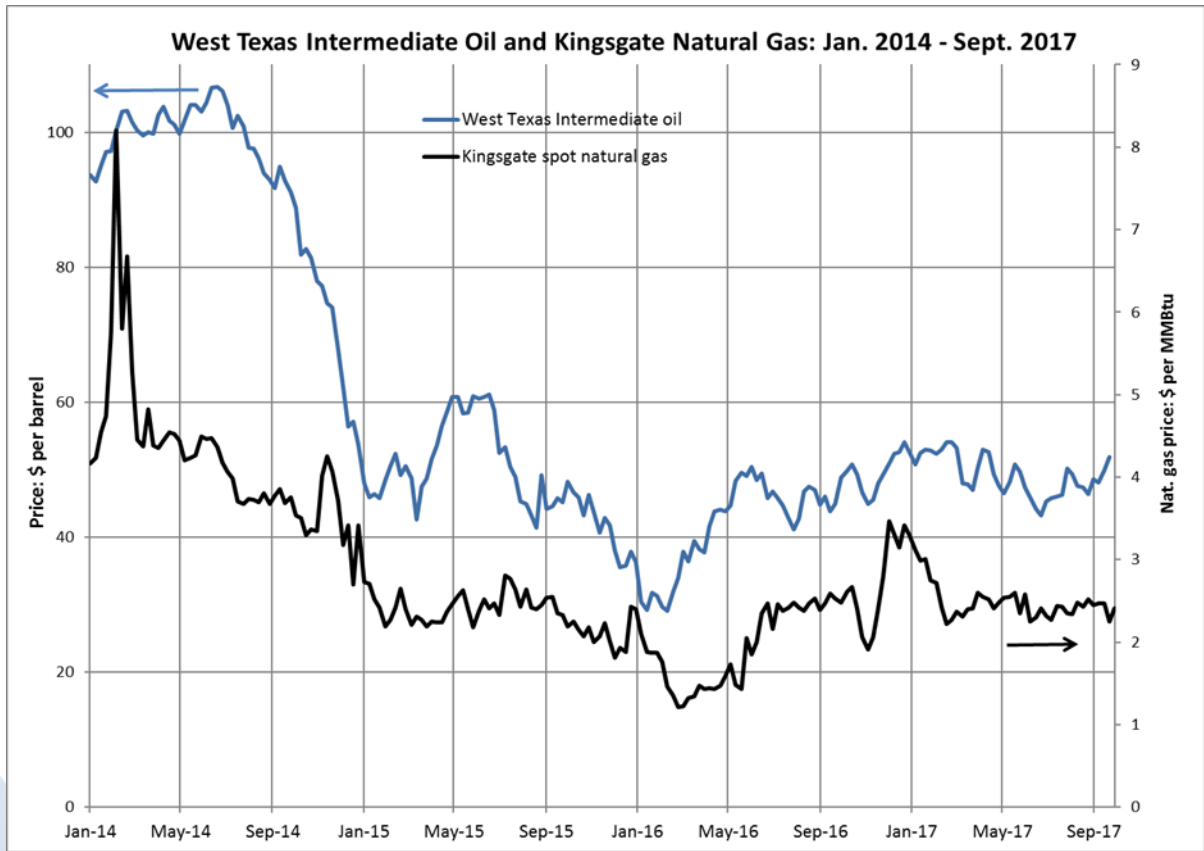
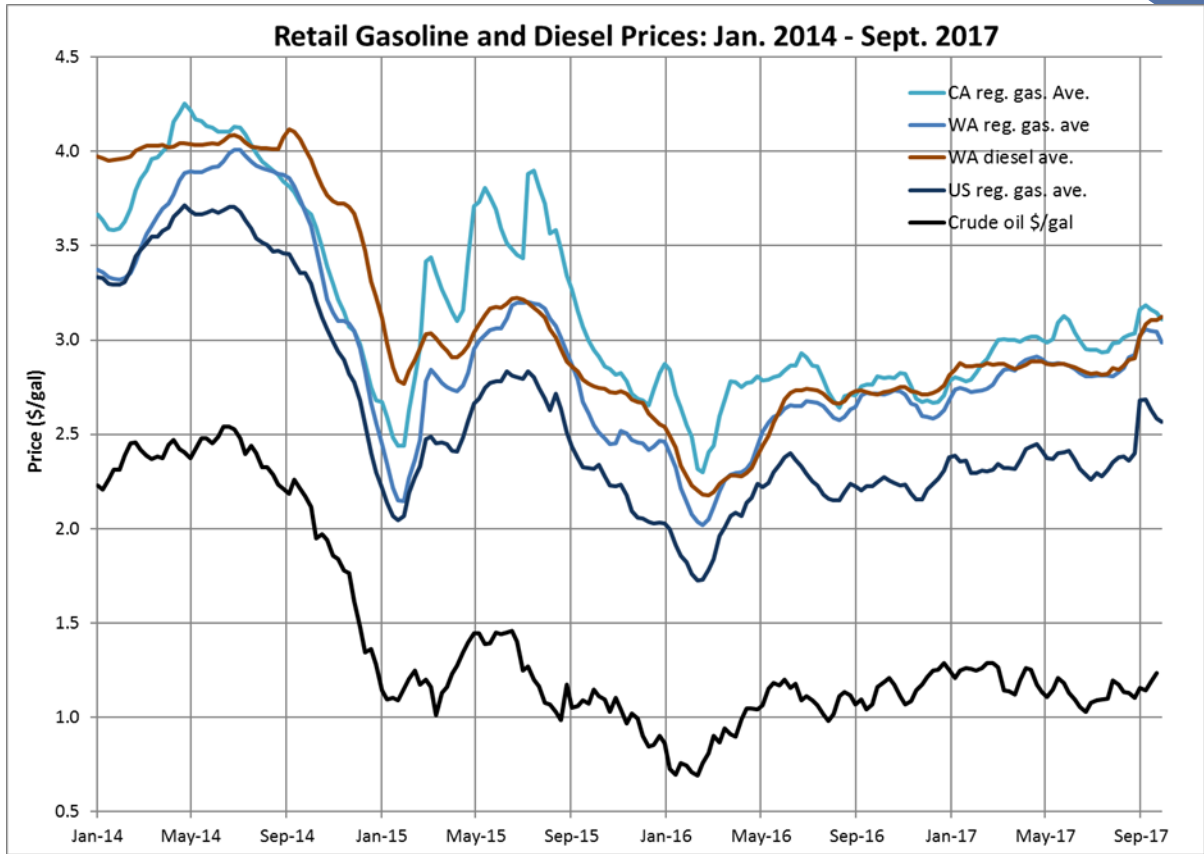
**Petroleum:** Crude oil prices rose during September as global inventories tightened and demand recovered following hurricane Harvey. The average West Texas Intermediate price was about \$51 per barrel, while international Brent fetched approximately \$57 per barrel.

**Transportation Fuels:** Transportation fuel prices at the national level increased during September, in part because of refinery closures in supply constraints in Texas due to hurricane Harvey. Most of the increase was in early September. The national average gasoline price was 18 cents per gallon higher relative to the last week of August. National gas and diesel were \$2.58 and \$2.79 per gallon respectively. Washington state average gasoline price for the same period increased by 12 cents, relative to the last week of August, to \$3.04 per gallon, while diesel increased 20 cents to \$3.11 per gallon

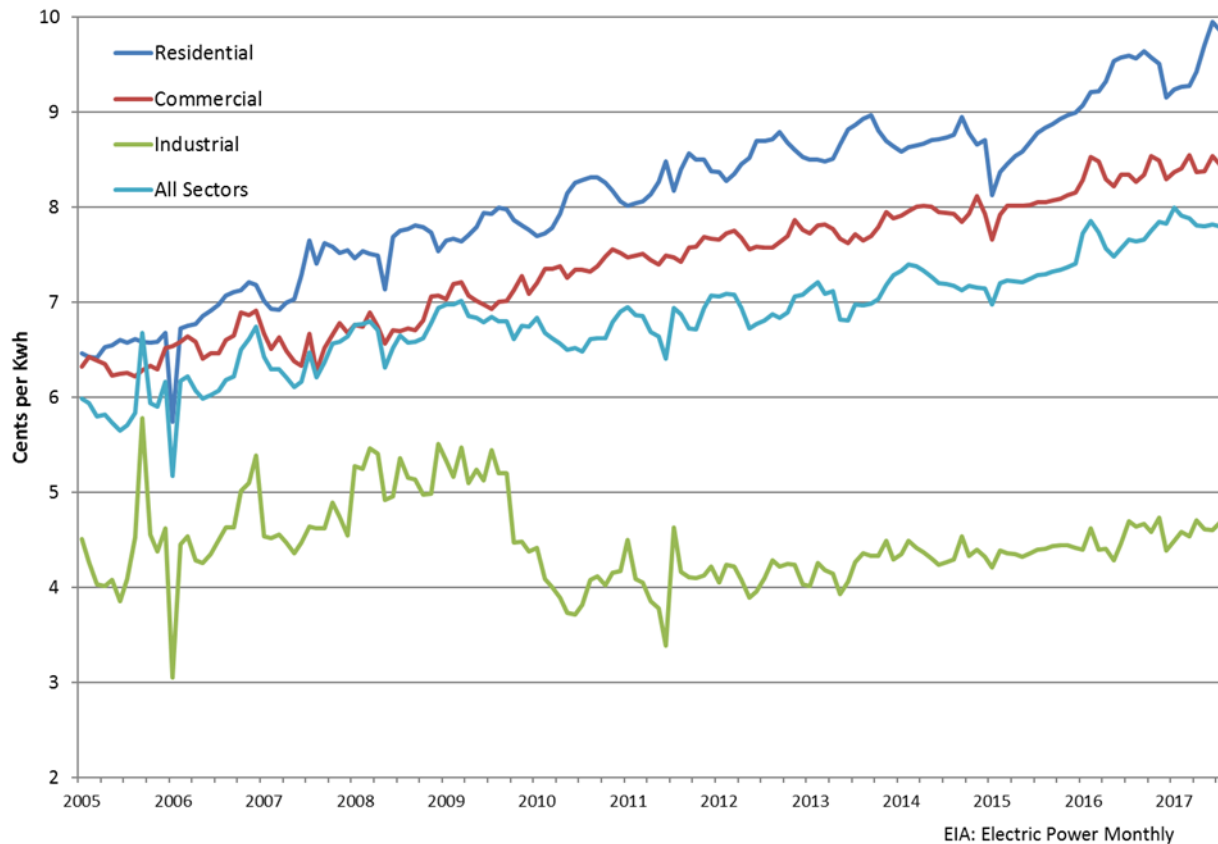
**Natural Gas:** The average Henry Hub natural gas price was largely unchanged in September as US inventories slowly edged up and demand remained modest. During September, the price for month-ahead (Oct.) NYMEX natural gas was down 18 cents at \$2.50 per MMBtu. Locally, the average September natural gas

spot price at the Kingsgate hub decreased to \$2.25 per MMBtu. National gas storage levels increased 42 Bcf last week and are at 3,508 Bcf, about 0.2% below the 5-year natural gas storage average for this time of the year, but 4.4% below the storage levels at this time in 2016. Gas storage in the Pacific region, which experienced a colder than average winter and warmer than average summer has seen higher demand. The inventory is running 9.3% below the 5-year average.

**Electricity:** Moderate temperatures along the west coast drove spot market electricity prices down during September. The dry summer continued to contribute to a relative reduction in river flow and hydro generation on the Columbia and Snake River systems (see River Data and Power Flow tables). The Mid-Columbia spot market price averaged \$24.9 per MWh in September, down \$26.5 per MWh from August's average, and \$2.9 per MWh lower than the average for Aug. 2016. Federal hydropower generation was 5889 aMW during August, less than three-quarters of the generation in July.



Washington State Electricity Rates by Sector: Jan. 2005 - July 2017



<b>Energy Price Summary, September 2017</b>	<b>Current</b>	<b>Month Ago</b>	<b>Year Ago</b>
Monthly Range at Mid-C (Peak: \$ per MWh)	19-42	24-145	23.5-37.3
Average Mid C price (Peak hours \$ MWh, current month)	24.9	51.4	27.8
Electricity WA Ave. Retail: July (cents/kWh)	7.80	7.82	7.66
Natural gas Kingsgate spot price (next day: \$ per million BTU)	2.25	2.54	2.53
Natural gas Sumas futures price (next month \$ per million BTU)	2.50	2.68	2.60
Natural gas Sumas monthly average: July (\$ per million BTU)	2.41	2.59	2.31
Natural gas H.H. futures (NYMEX next month: \$ per million BTU)	2.97	2.89	3.00
E85 (national average: \$ per gallon gasoline)	2.45	2.36	2.13
Ethanol (CBT next month contract: \$ per gallon)	1.43	1.48	1.55
Corn (CBT next month contract: \$ per bushel)	3.49	3.55	3.30
Petroleum, West Texas Intermediate futures (\$ per barrel)	49.6	47.7	44.9
Seattle gasoline price (\$ per gallon, last week of the month)	3.09	2.96	2.76
Gasoline futures (NYMEX next month: \$ per gallon)	1.70	1.62	1.38
State diesel price (\$ per gallon, last week of the month)	3.11	2.91	2.72
Heating oil futures (NYMEX next month: \$ per gallon)	1.77	1.62	1.42
U.S. residential propane price report (\$ per gallon)	NA	NA	NA
<b>Clean Cities: Alternative Fuel Price Report, July 2017</b>	<b>Current qtr US avg</b>	<b>Current qtr west coast</b>	<b>Last qtr avg west coast</b>
Ethanol E85 (\$ per gas gallon equiv.)	2.59	3.20	3.24
Biodiesel B20 (\$ per diesel gallon equiv.)	2.54	2.54	2.60
Biodiesel B99-100 (\$ per diesel gallon equiv.)	3.54	3.54	3.45
Compressed Natural Gas (\$ per gas gallon equiv.)	2.15	2.47	2.46
Propane (\$ per gas gallon equiv.)	3.89	4.14	4.14





# Energy Headlines

If you only have time to read a few articles—read these.

[Washington Home Builders Recognized for Energy Efficiency and Innovation.](#)

[Western governors set sights on electric vehicle charging network spanning seven states.](#) Denver Post, October 4, 2017

[GM Plans 20 All-Electric Models by 2023.](#) Bloomberg, October 2, 2017

[Washington Utilities and Transportation Commission: Energy storage key to electric utilities' efficiency and service.](#) October 11, 2017

[Energy Department Awards 6 New Distributed Wind Component Development and Testing Projects](#) (one in Oregon) October 17, 2017

[Repeal of Carbon Pollution Emission Guidelines for Existing Stationary Sources.](#) Comment Period open until 12/15/2017. Federal Register, October 16, 2017



## Other energy news headlines

Op/Ed: [The Nature Conservancy Is Forging a New Coalition to Push for Statewide Climate Policy](#) (Seattle Times, WA – Paywall Advisory)

[Climate Change is Complex: We have answers to your questions.](#) NYT, Sept. 19.

[Distributed Energy: The Utility-Scale Solution](#) (Atlantic Magazine)

[Should Utilities Build Charging Stations for Electric Cars?](#) (Huffington Post)

[FERC Chairman Neil Chatterjee Won't Commit to Propping Up Coal, Nuclear Power](#) (Washington Examiner)

[Puget Sound Energy Settlement Paves Way to Close Older Units at Coal-Fired Power Plant](#) (Associated Press)

[International Trade Commission Finds Injury to US Solar Manufacturers, Sending Tariff Decision to Trump](#) (Utility Dive)

[Editorial: Uh-Oh – Dueling Washington State Carbon Initiatives](#) (Olympian, WA – Paywall Advisory)

[States Supporting Paris Climate Deal Claim Status as Third-Largest Economy](#) (Washington Examiner)

[Charging Cars – Volkswagen Settlement Provides Funding Opportunities for Electric Utilities](#) (JDSupra)

[Washington State Denies Key Permit for U.S.-Asia Coal Export Terminal](#) (Reuters)

[It's Cheaper to Save Energy than to Buy It, Despite Misleading Claims](#) (The Energy Collective)

[PacifiCorp Launches RFP for 1,270 MW of Wyoming Wind](#) (Utility Dive)

[We've Grossly Underestimated How Much Cow Farts Are Contributing to Global Warming](#) (Gizmodo)

[Portland General Electric Joins California Power Trading Market](#) (Utility Dive)

[GM: The Future Is All-Electric](#) (CNN – Tech)

[Solar Energy Is Fastest Growing Source of Power](#) (Associated Press)

[Western WA Clean Cities Members saved 20 Million Gallons of Petroleum in 2016](#)

## Upcoming Events

[Washington's Energy Future Conference](#)—November 6, 2017 | Tacoma, WA

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