SDG&E PY 2025 DR PORTFOLIO SUMMARY
CALIFORNIA DRMEC IOU WORKSHOP

MAY 5, 2026

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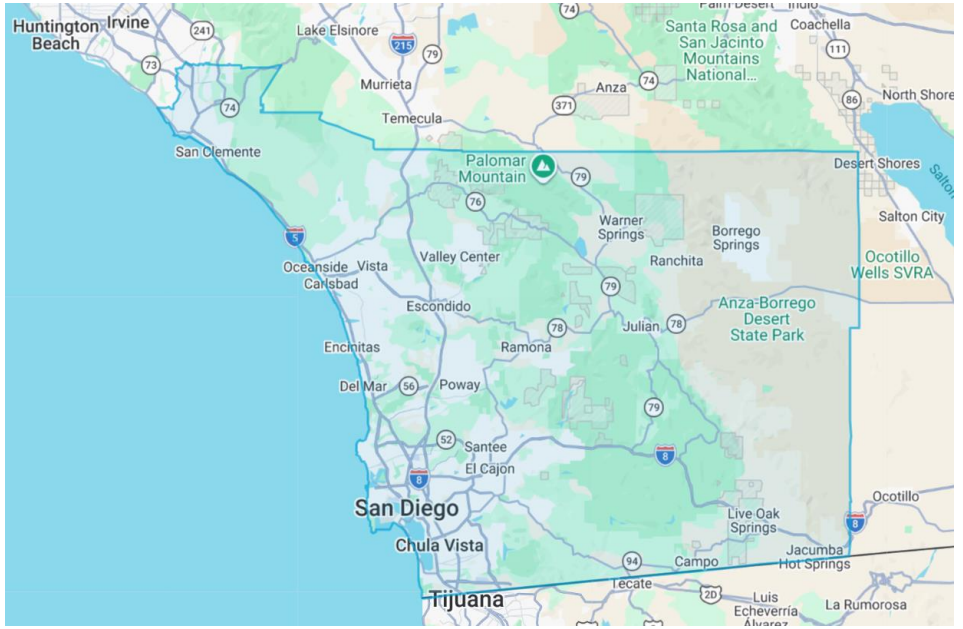
STATE OF THE PROGRAM

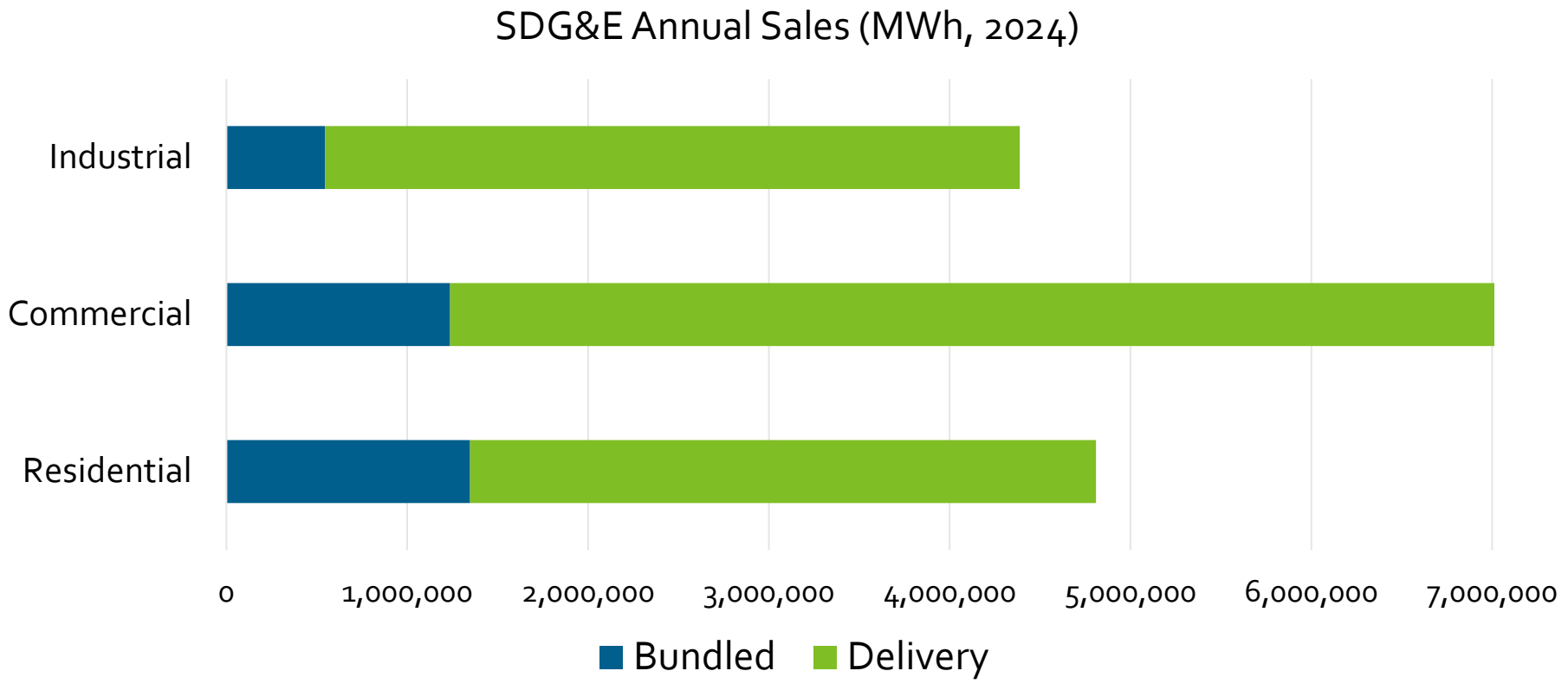
ABOUT SDG&E

- SDG&E serves approximately 3.7 million people through 1.5 million residential + non-residential accounts
- Service area includes 2 counties and 25 communities in 4,100 square-mile service area
- 2024 annual sales (MWh) and customers from EIA data below:



Service Type	RESIDENTIAL		COMMERCIAL		INDUSTRIAL		TOTAL	
	MWh	Customers	MWh	Customers	MWh	Customers	MWh	Customers
Bundled	1,347,817	307,982	1,237,280	34,342	545,010	1,110	3,207,120	343,439
Delivery	3,462,171	1,056,379	6,179,866	122,616	3,842,016	3,534	13,484,053	1,182,529
Total	**4,809,988**	**1,364,361**	**7,417,146**	**156,958**	**4,387,026**	**4,644**	**16,691,173**	**1,525,968**

MOST SDG&E SALES ARE TO C&I CUSTOMERS WITH UNBUNDLED SERVICE



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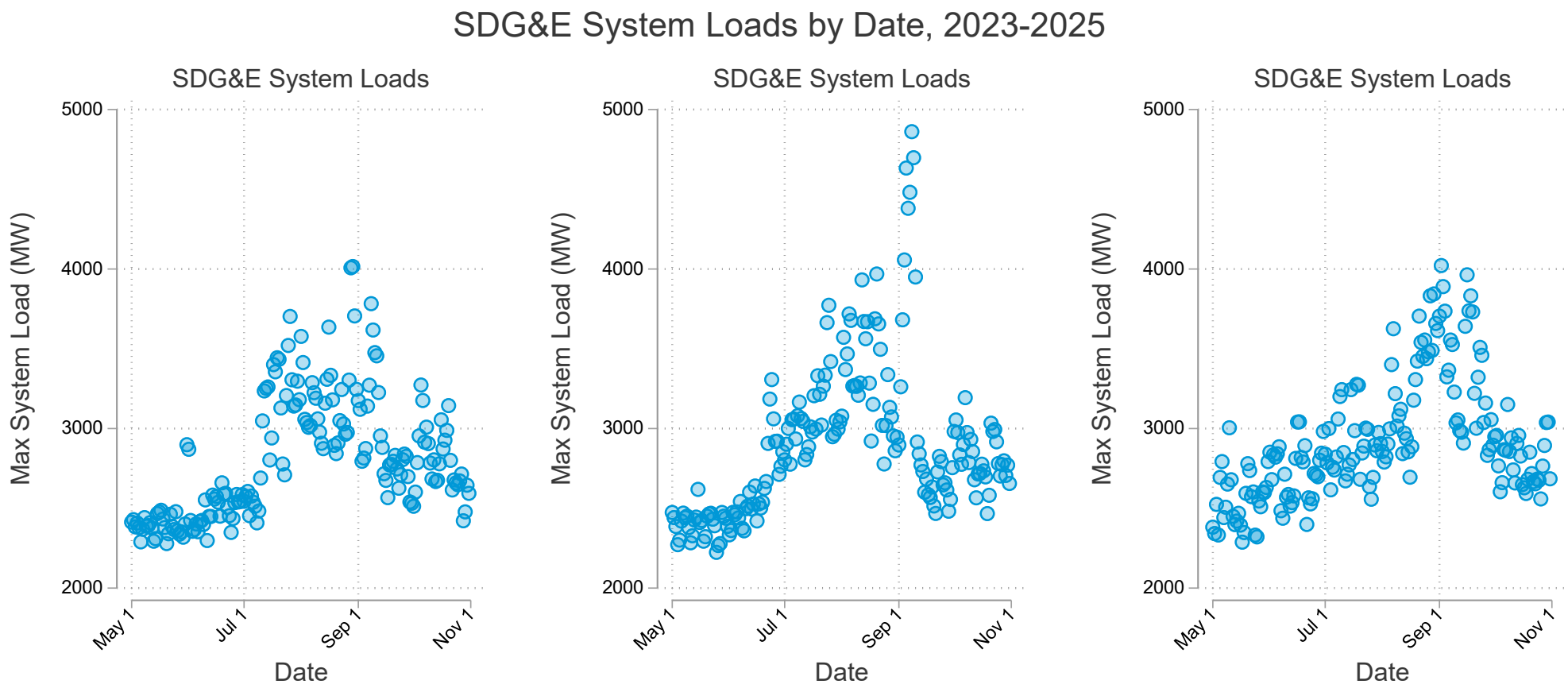
SDG&E SYSTEM PEAK DEMAND IS ~5,000 MW



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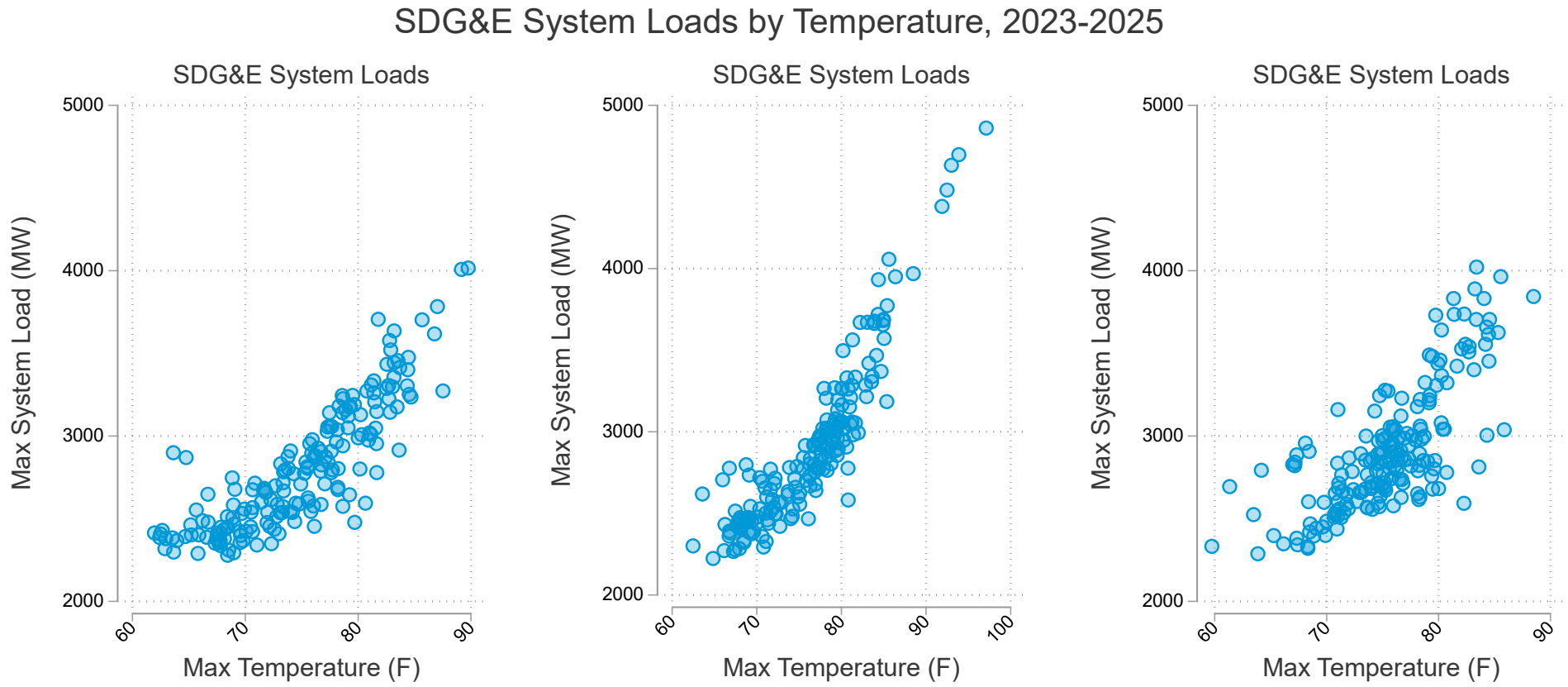
SUMMER DEMAND IS WEATHER SENSITIVE, BUT 2025 WAS RELATIVELY MILD



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SDG&E'S DEMAND RESPONSE PORTFOLIO

- SDG&E DR programs saved 25 MW during the summer of 2025
  - Not including CBP (too few customers to report publicly)
- Over 120,000 residential and non-residential customers are enrolled in one of SDG&E's DR programs, rates, or pilots
  - Largest number are on the EV – TOU rates
- Any other programs administered by aggregators, CCAs, etc.

Supply-Side DR Resources	Load-Modifying DR Resources	Pilots
Capacity Bidding Program (CBP)	Critical Peak Pricing (CPP) Rate	Emergency Load Reduction Program (ELRP) Pilot – Sub-Group A.1. (customer) – Sub-Group A.2. (aggregator/third-party) – Sub-Group A.4. (aggregator/third-party) – Sub-Group A.5. (aggregator/third-party) – Sub-Group A.6. (customer) – Sub-Group B.2. (aggregator/third-party)
	EV – Time of Use (TOU)	
	EV – Vehicle Grid Integration (VGI)	

CAPACITY BIDDING PROGRAM

- The CBP enables aggregators to contract with groups of customers to collectively respond to events
  - Aggregators are paid based on the amount of energy they nominate each month, as well as kWh reductions during events
- CBP Events can be called from May through October
  - Any day except for Sunday
- Due to the small number of customers enrolled in CBP, impact estimates are confidential

CRITICAL PEAK PRICING (CPP)

- Delivered as a set of rate modifiers during peak hours to approximately 17,000 C&I customers
  - Default rate option for these customers (bundled service only)
- Price adder on event days for peak hours (4 to 9 p.m.), encouraging load shifting.
  - On summer non-CPP hours, customers pay less for energy (kWh) and/or demand charges
- For PY 2025, SDG&E did not trigger any events because the trigger conditions were not met:
  - *"A CPP Event may be triggered if the day-ahead system load forecast for the potential event day is greater than 4,000 MW. Events may also be triggered in response to high forecasted temperatures, extreme conditions, and emergencies."*
- Ex Ante Impacts
  - **Large:** 0.6 – 0.7 MW on an August worst day from 2026 - 2035
  - **Medium:** 0.2– 0.3 MW on an August worst day from 2026 - 2035
  - **Small:** 0.5– 0.7 MW on an August worst day from 2026 - 2035

EV- TIME OF USE RATE

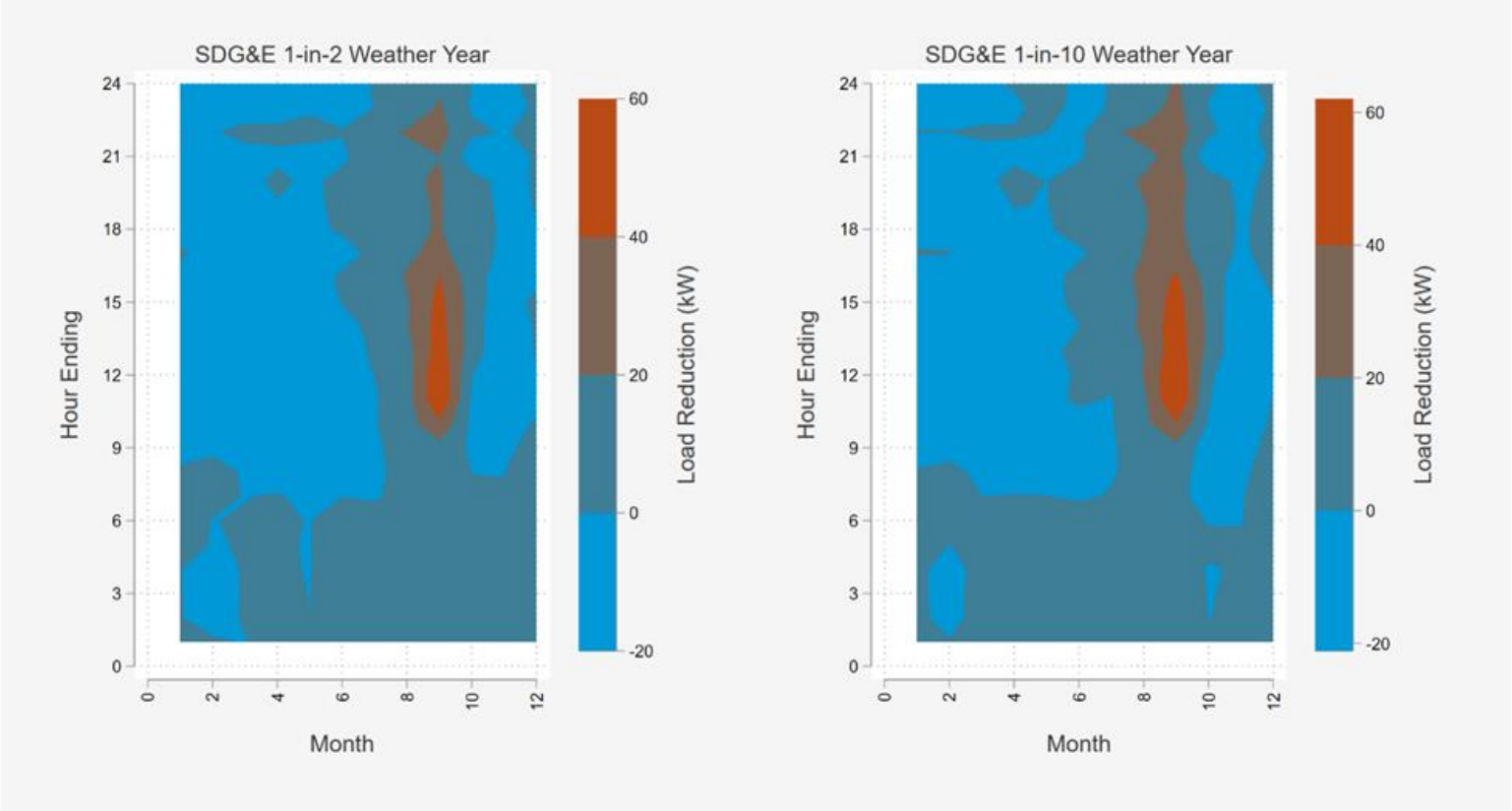
- SDG&E's 3 EV TOU Rates (**EV-TOU-2, EV-TOU-5, TOU-ELEC**) incentivize customers to shift charging from peak hours
  - And into hours with low demand or excess capacity from solar
- Top 5 SDG&E load days in PY2025: EV TOU customers curtailed peak demand by **19.2 MW**
- Ex Ante Impacts
  - Expected to deliver **41.1 – 189.7 MW** on an August 1-in-2 worst day from 2026 – 2035
  - Increased impacts over time are driven by expected enrollment growth
  - Enrollment predicted to grow by 5 to 6x over next decade:
    - From 105,985 in 2025 to 587,487 by 2035
    - More EVs + more EV-TOU rate enrollees among EV owners

EV – VEHICLE GRID INTEGRATION RATE

How it Works

- The VGI rate works in tandem with an infrastructure program, Power Your Drive (PYD)
  - ➢ PYD helped install chargers at multi-family dwelling and workplaces
  - ➢ Charging at these sites is billed under the VGI rate
  - ➢ The VGI rate is dynamic hourly rate that incorporates market prices, distribution cost recovery, and adders for the top 150 system load hours and top 200 distribution circuit load hours.
- Top 5 SDG&E load days in PY2025: VGI sites curtailed peak demand by **3.1 MW**

Heat Map of Ex-Ante Demand Reductions per Site



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EMERGENCY LOAD REDUCTION PROGRAM

- ELRP events are dispatched on extreme days using emergency triggers during peak hours
  - Participants are paid $1 (A6 – Residential) or $2 (other groups) per kWh reduced during ELRP events
  - Event dates vary by group
- Ex post impacts:
  - **A4 VPPs (battery dispatch):** 2.3 MW on avg. across 7 events (n = 651)
  - **A1, A2, A5 (VGI):** Confidential
  - **A6 (Res.), B2:** No events
- Ex Ante results (combined): Expected to deliver 8.2 – 8.6 MW on the worst day in August from 2026 – 2027
  - This change is largely driven by enrollment, which is expected to grow to approximately 3,000 in 2026 and 2027.

QUESTIONS?

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