2014 Industry & Ag Sector Trends

Presentation to CAC

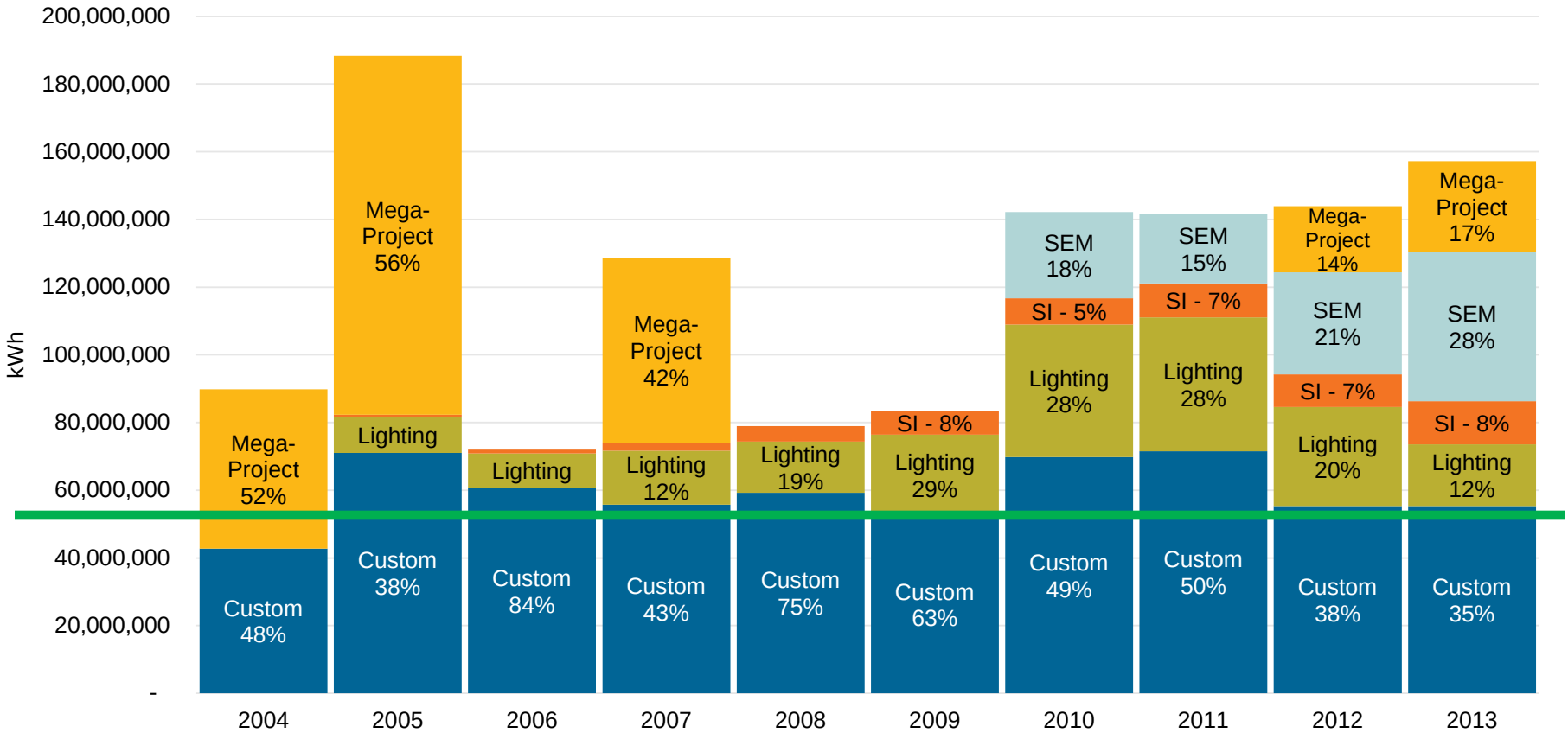
4/23/14

EnergyTrust of Oregon

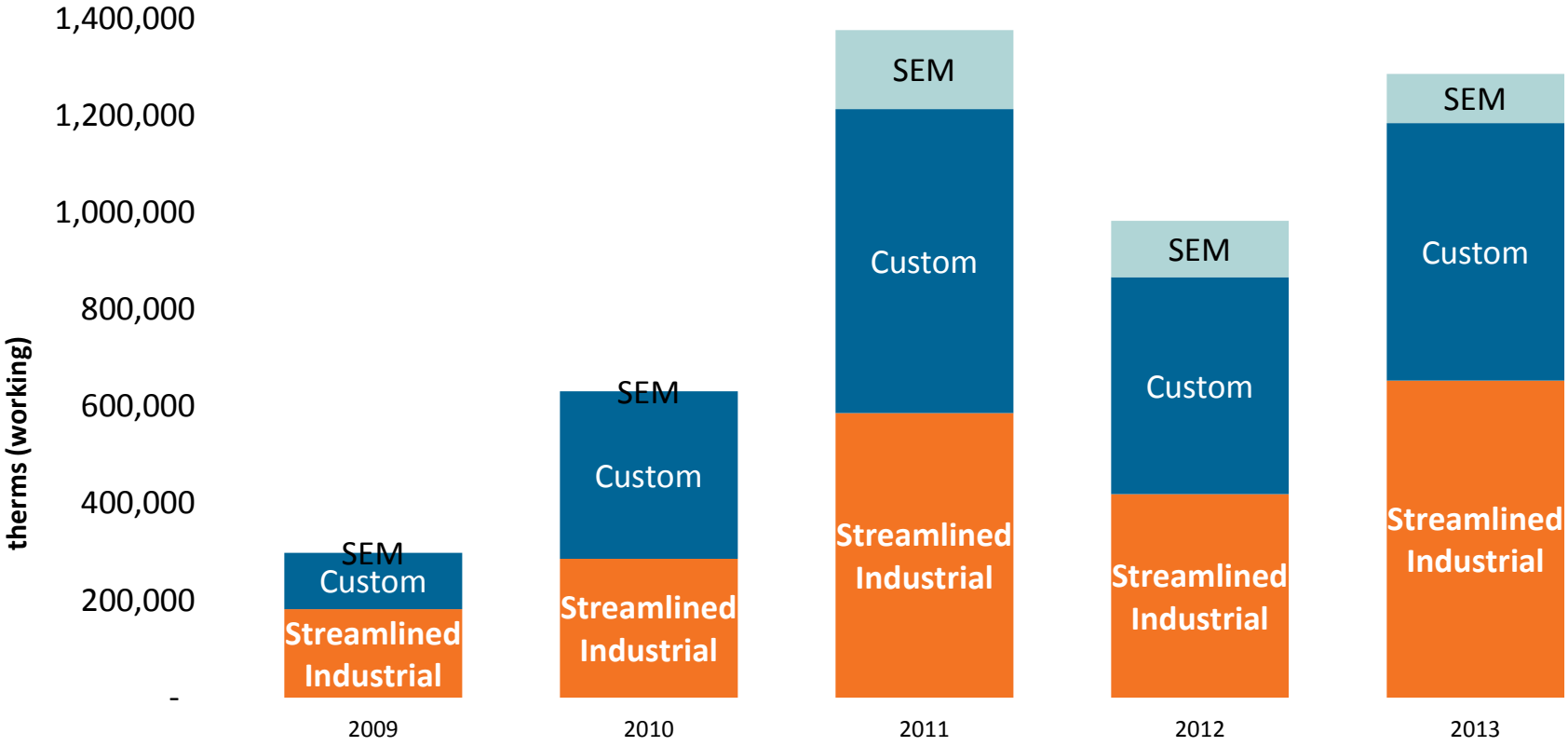
Top Trends from Industry & Ag

- Predictability yields consistent savings
- Volume growth from small, simple projects
- Savings growth from large, complex projects
- Streamlined still major source of gas savings
- Savings are shifting across sectors
- Diversification benefits continue to drive growth and hedge portfolio risk

Electric Savings by Track, Historical



Gas Savings by Track, Historical

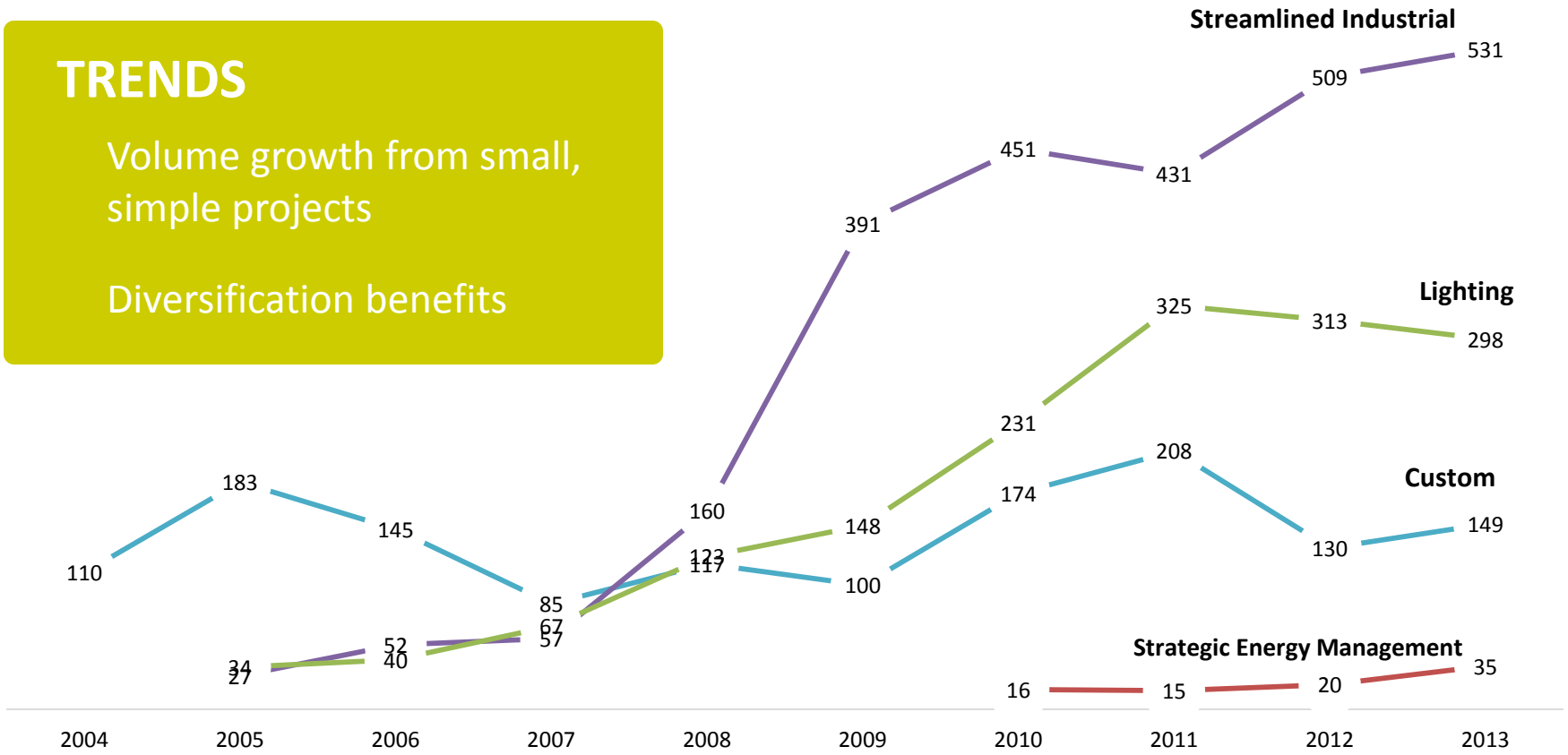


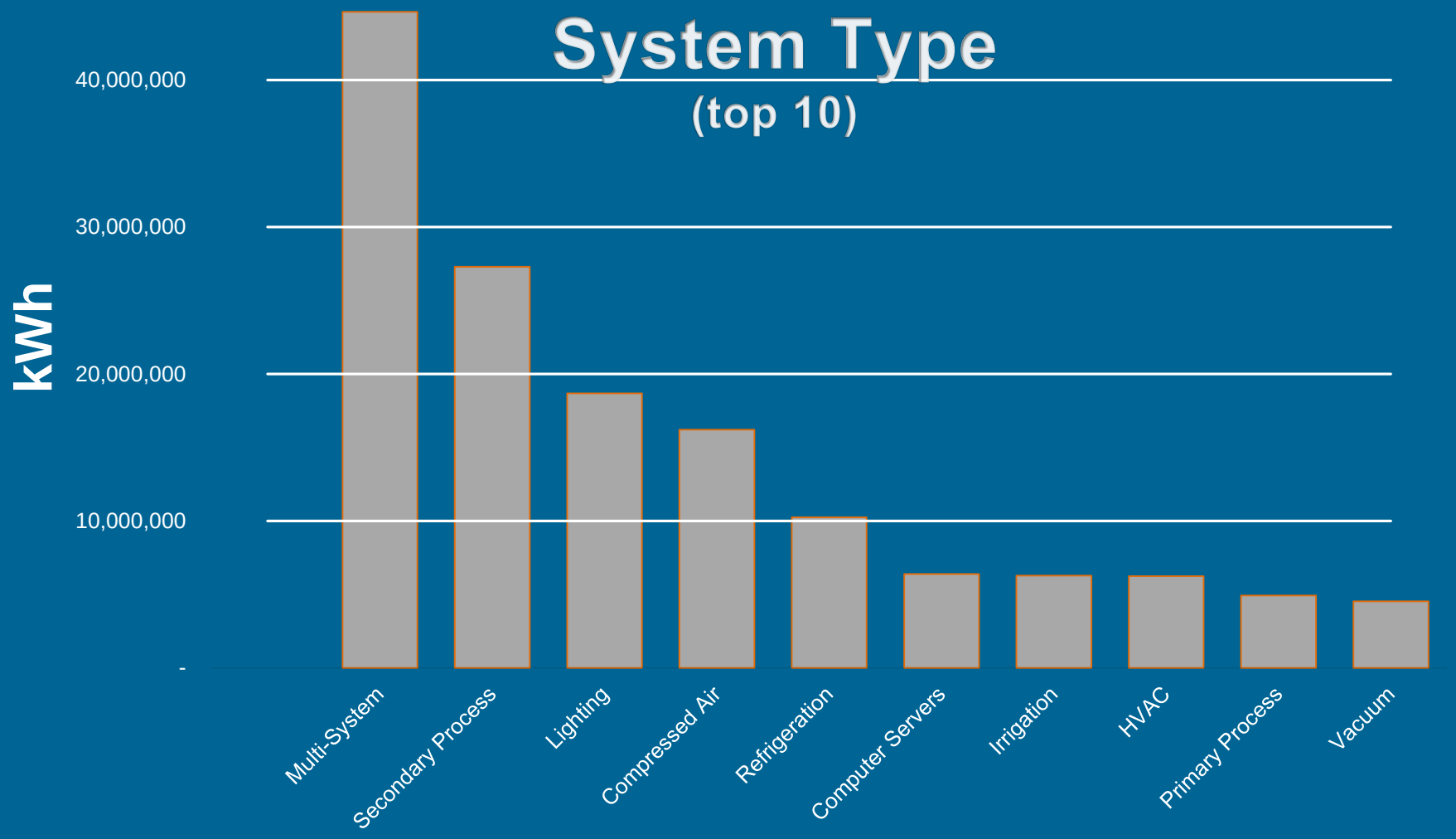
Projects Completed *(track)*

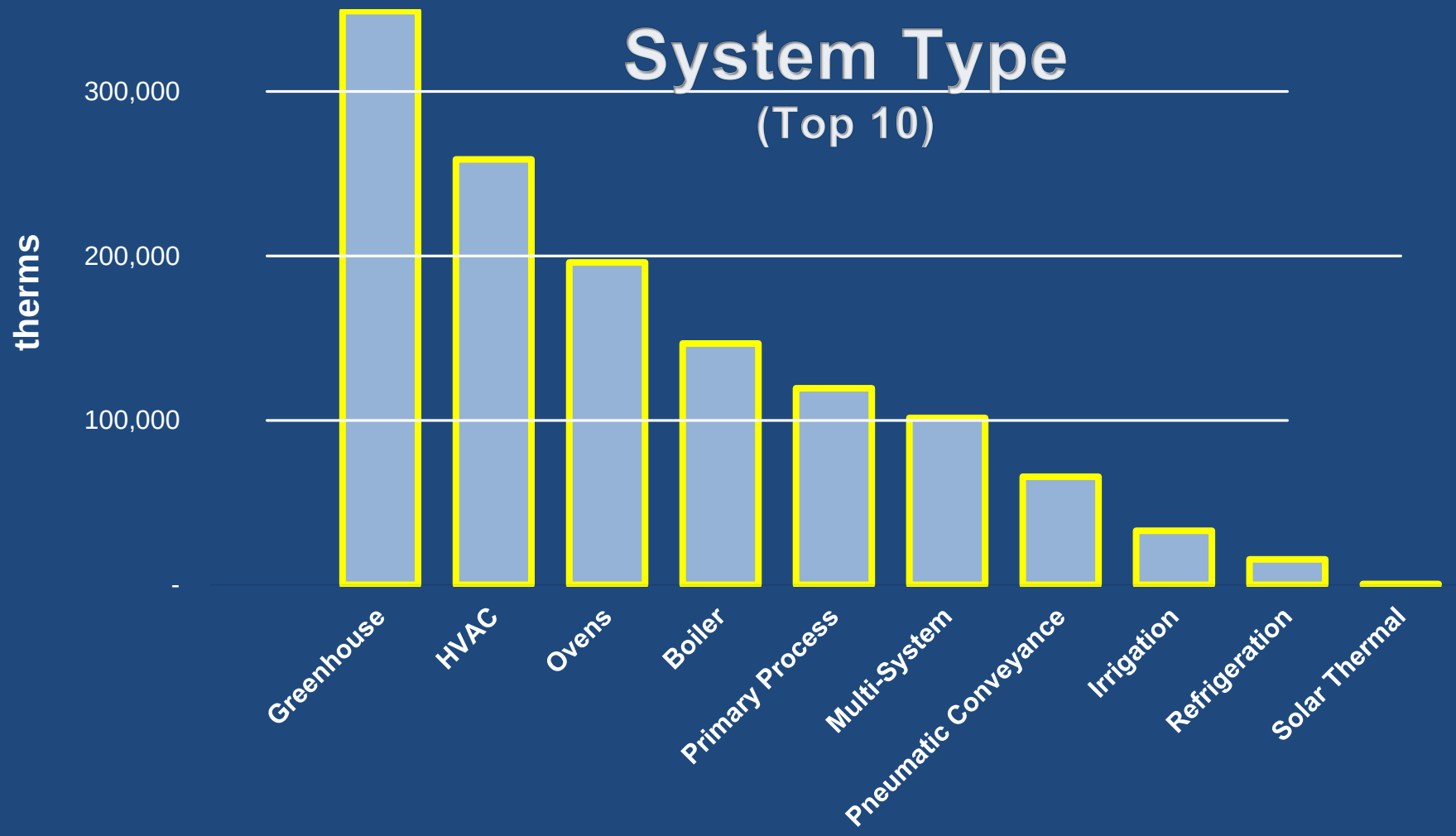
TRENDS

Volume growth from small, simple projects

Diversification benefits

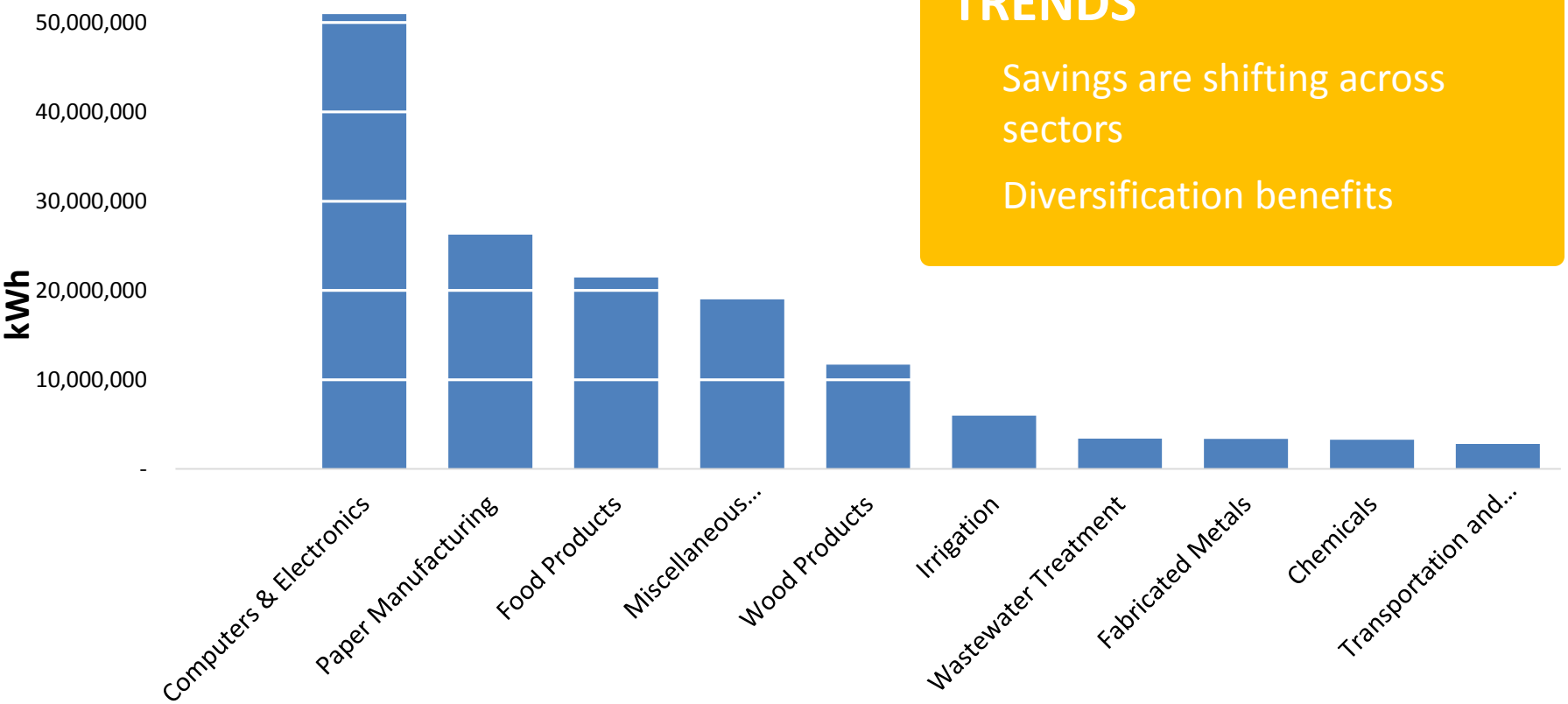



System Type
(top 10)
kWh
40,000,000
30,000,000
20,000,000
10,000,000
-
Multi-System
Secondary Process
Lighting
Compressed Air
Refrigeration
Computer Servers
Irrigation
HVAC
Primary Process
Vacuum


System Type
(Top 10)
therms
300,000
200,000
100,000
-
Greenhouse
HVAC
Ovens
Boiler
Primary Process
Multi-System
Pneumatic Conveyance
Irrigation
Refrigeration
Solar Thermal

UMPQUA
Buttermilk
UMPQUA
Buttermilk
UMPQUA
DAIRY
Cultured Lowfat
UMPQUA
DAIRY
Cultured Lowfat
UMPQUA

2013 kWh Savings by Industry Sector

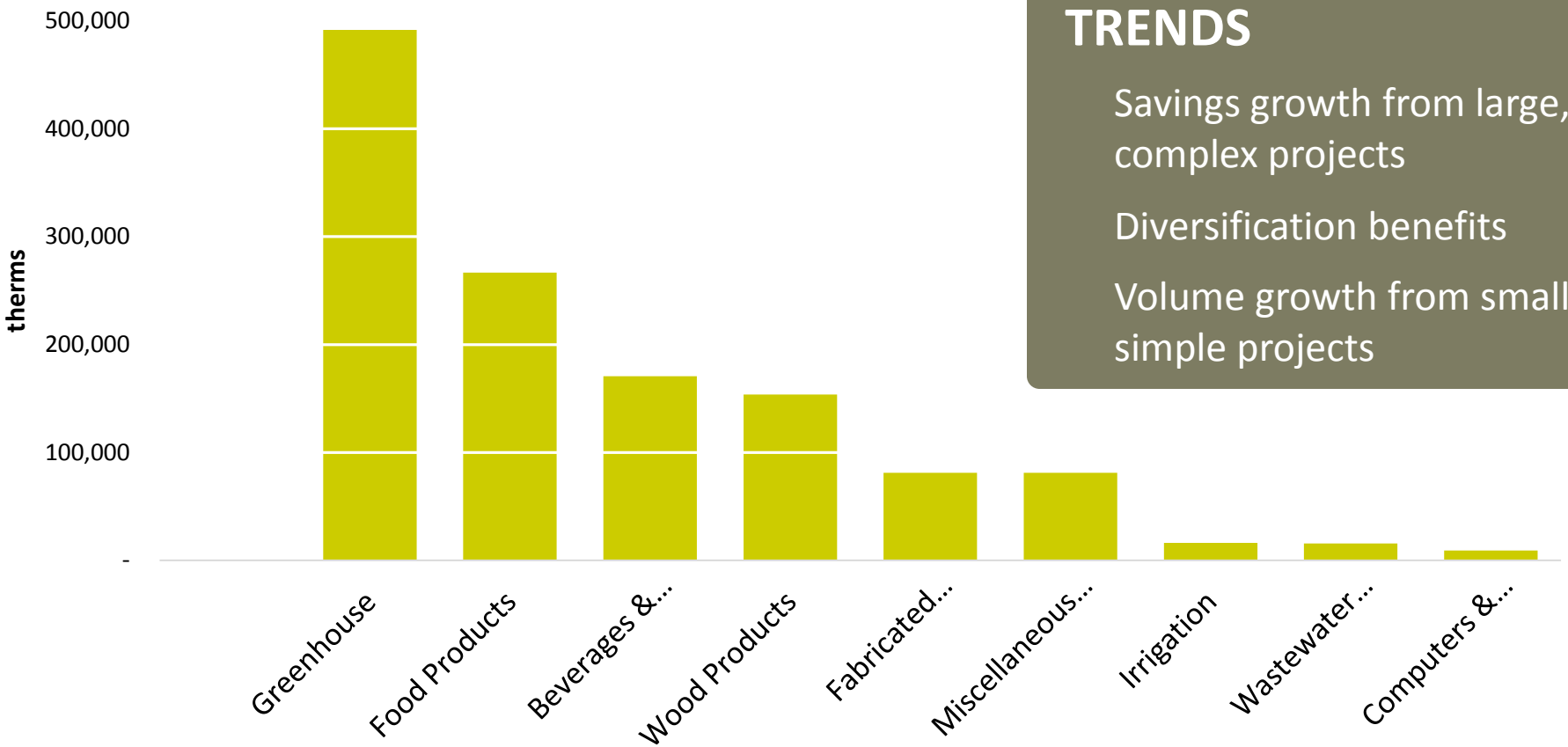


TRENDS

- Savings are shifting across sectors
- Diversification benefits

Convincing High-Tech to work with Energy Trust has taken some effort.

2013 Gas Savings by Industry Sector



TRENDS

- Savings growth from large, complex projects
- Diversification benefits
- Volume growth from small, simple projects

Thank You

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EnergyTrust of Oregon