

PREPARED FOR **AMERICAN PETROLEUM INSTITUTE**

PREPARED BY **ICF**

9300 LEE HIGHWAY | FAIRFAX VA

JUNE 2017

Benefits and Opportunities of Natural Gas Use, Transportation, and Production



Idaho

Economic Impacts of Natural Gas

There were 10,400 jobs in Idaho related to natural gas. These jobs represented 1.6 percent of total state jobs. The top three sectors with the greatest number of jobs were natural gas distribution, industrial equipment and machinery repair and maintenance, and oil and gas pipeline construction. The contribution to the Idaho economy in terms of direct, indirect, and induced value added in 2015 was \$1,207 million, of which \$631 million was related to the end use segment, \$446 million was from the infrastructure segment, and \$130 million was from the production segment.

Natural Gas Consumers

In 2015, Idaho consumed 100 Bcf of natural gas in all sectors. There were a total of 416,000 customers. The value of natural gas delivered to consumers was \$522 million.

Idaho has 375,000 residential customers who consumed 23 Bcf in 2015. Average consumption was 63 Mcf per household. Residential demand was 68 percent for space heating, 27 percent for water heating, 2 percent for cooking, and 3 percent for other uses.

Idaho has 41,000 commercial customers who consumed 17 Bcf in 2015. Average consumption per commercial customer was 410 Mcf. Commercial demand was 55 percent for space heating, 17 percent for water heating, 12 percent for cooking, and 16 percent for other uses.

There are 187 industrial customers in Idaho who consumed 32 Bcf in 2015. Average consumption per industrial customer was 169 MMcf. The top industries for gas consumption were Food (NAICS Code 311), Chemicals (325), Agriculture (11), Fabricated Metal Products (332), and Computer and Electronic Products (334), representing 84 percent of industrial demand.

Idaho has 11 power plants consuming natural gas. In 2015, gas consumed was 28 Bcf, representing 24 percent of power generation in the state. Average consumption per customer was 2,526 MMcf.

Natural Gas Infrastructure

Idaho has no oil and gas wells or production and all natural gas consumed comes from other states. In 2015, there were 1,503 miles of gas transmission lines, 11 miles of crude oil pipelines, no NGL lines, and 646 miles of oil product lines. There were 8,257 miles of gas distribution mains and 7,010 miles of service lines.

Exhibit 7-14: Idaho State Factsheet

Idaho			Employment (# of Workers)			Labor Income (\$ million)			Value Added (\$ million)		
Summary	Segment	Category	Direct & Indirect	Induced	Total	Direct & Indirect	Induced	Total	Direct & Indirect	Induced	Total
	End-Use	Power Generation	370	780	1,150	28	39	67	90	69	159
		Industrial	503	1,449	1,952	32	69	100	83	128	211
		Residential/ Commercial	671	808	1,478	43	41	84	165	73	238
		Export	105	146	251	8	7	15	8	13	21
		Transportation	7	6	13	0	0	1	1	1	2
	Infrastructure	Processing	143	275	418	9	13	22	10	25	35
		Pipelines	526	710	1,236	34	34	68	51	65	116
		Distribution	1,276	1,070	2,346	83	51	134	192	97	289
		Wholesalers, Marketers, Other	28	26	54	2	1	3	4	2	6
		Production	Natural Gas/ NGLs	588	931	1,519	43	45	88	47	83
	All Segments	Grand Total	4,217	6,200	10,417	282	300	582	652	555	1,207

Jobs by Top Industries	Rank	NAICS	Industry Sector	Direct and Indirect Jobs
	1	221210	Natural Gas Distribution	356
	2	811310	Industrial Equip. & Machinery Repair & Maint.	187
	3	237120	Oil & Gas Pipeline Construction	165
	4	45431NGL	NGL Retail	156
	5	326122	Plastics Pipe & Fittings manufacturing	123
	6	236210	Industrial Construction	80
	7	325	Chemical Manufacturing	74
	8	811412	Household Appliance Repair & Maintenance	68
	9	221112	Gas-fired Electric Power Generation	68
	10	4841	Freight Truck	67

Customers	Sector	Customer Count	Consumption Volume (MMcf/ year)	Value of Natural Gas Delivered to Customers (\$million)
	Residential Sector	374,557	23,482	\$201
	Commercial Sector	40,744	16,708	\$123
	Industrial Sector	187	31,664	\$116
	Transportation	13	166	\$1
	Power Sector	11	27,790	\$80
	All Sectors	415,512	99,811	\$522

Infrastructure	Gas Distribution Main (miles)	Gas Distribution Services (miles)	Gas Gathering (miles)	Gas Pipelines (miles)	Crude Oil Pipelines (miles)	NGL Pipelines (miles)	Oil Product Pipelines (miles)	CO2 Pipelines (miles)
	8,257	7,010	0	1,503	11	0	646	0

Production	Product	Annual Production
	Dry Natural Gas (mmcf)	0
	Gas Plant Liquids (barrels)	0
	Lease Condensate (barrels)	0
	Crude Oil (barrels)	0
	Annual Value Counted Toward Natural Gas Value Chain (\$million)	\$0
	Annual Value of All Produced Oil, Gas, NGLs (\$million)	\$0

Wells	Well Type	Operating Wells	New Wells Drilled
	Oil Wells	0	0
	Gas Wells	0	1
	All Wells	0	1

Annual 2015 Data for Idaho
Natural Gas Value Chain Basis