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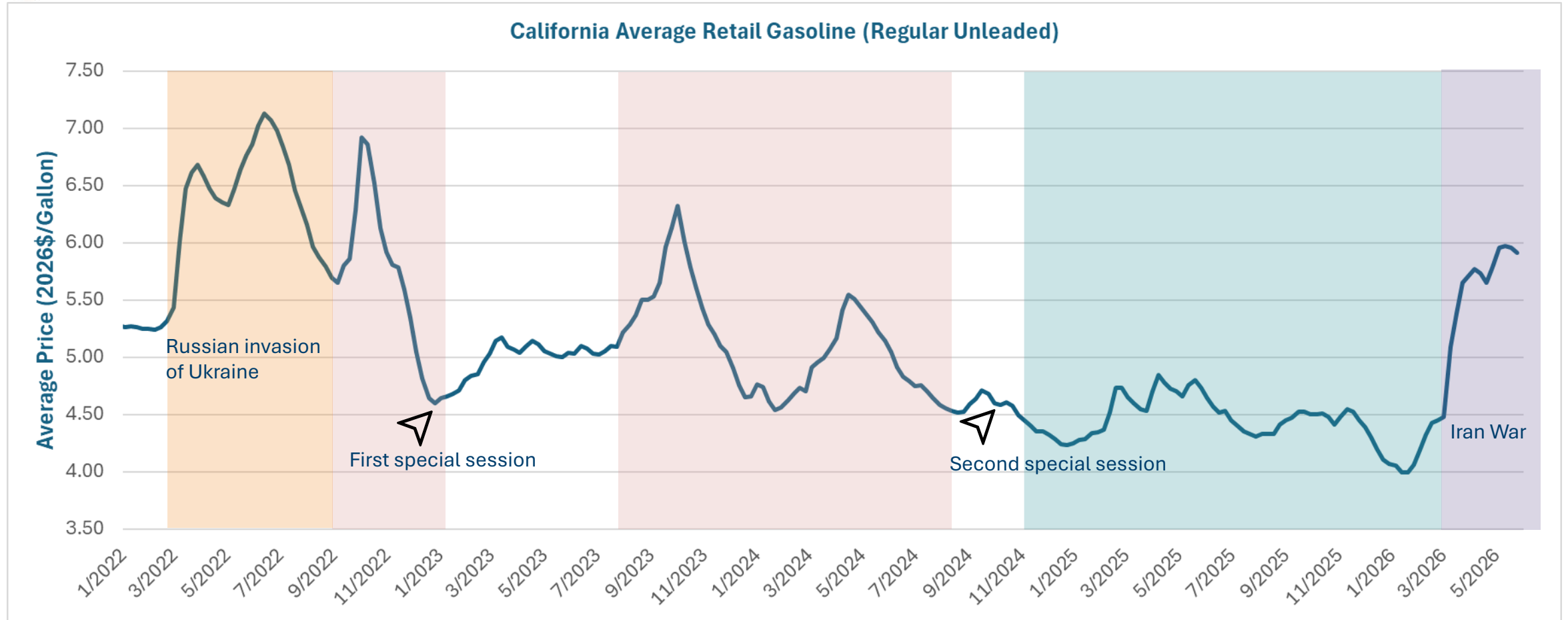
Transportation Fuels Reliability Workshop

Deborah Meeks, Deputy Director, Fuels Analysis

June 8, 2026



A System in Transition



2022

Global disruption



2022-2024

Price spikes lead to two special sessions



2025-2026

Capacity loss and record imports

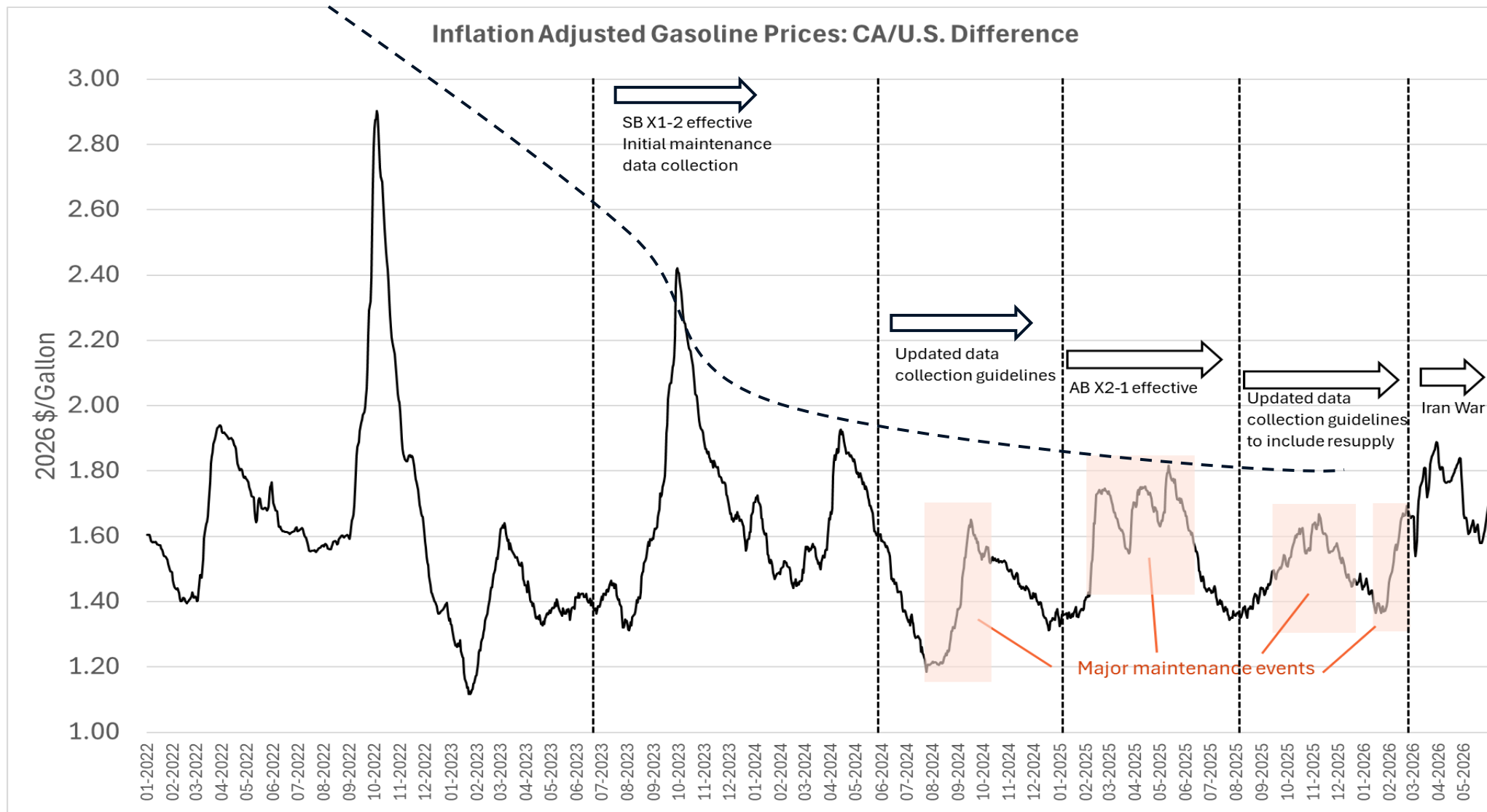


2026

Global disruption



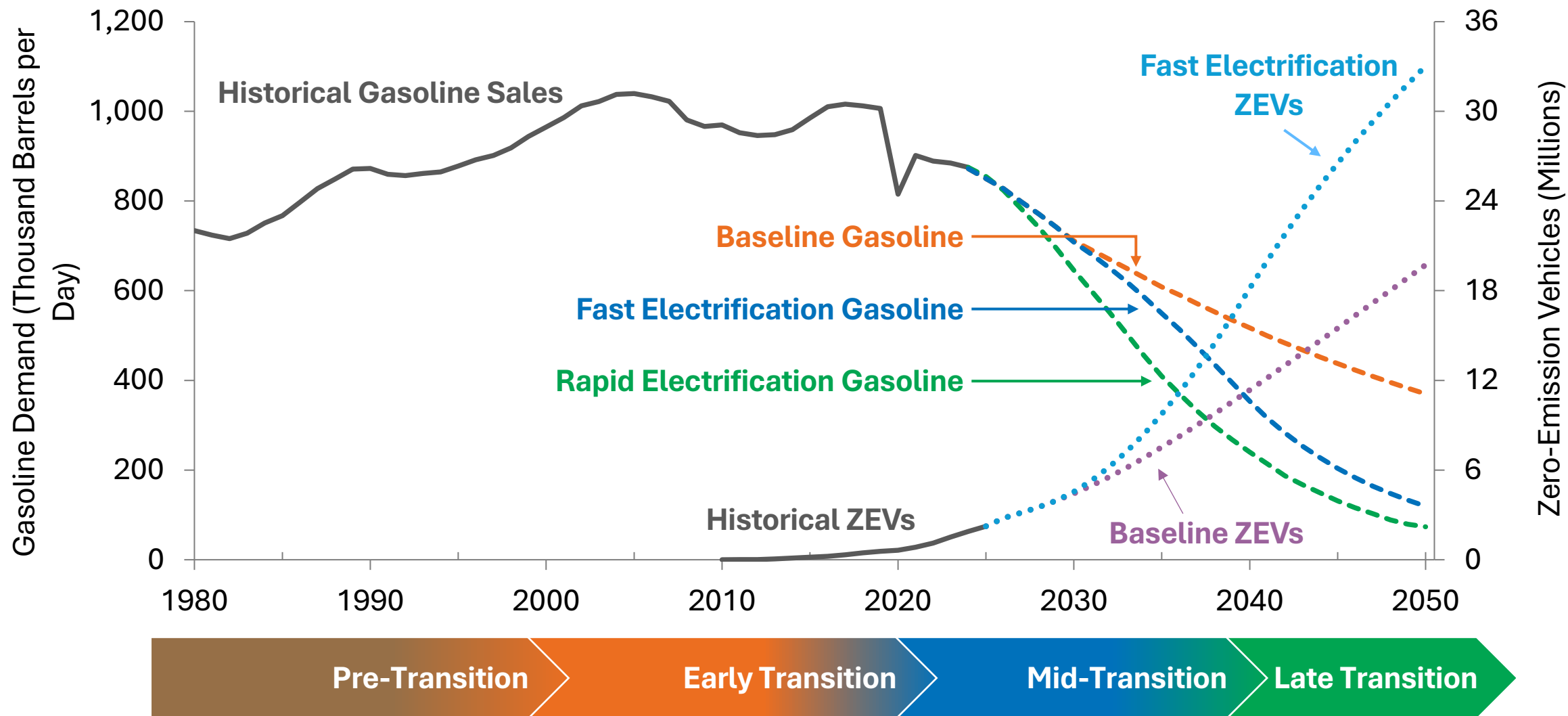
Reduced Extremes in CA versus U.S. Prices Since Special Sessions and Greater Transparency



Source: CEC analysis of OPIS, AAA, and public data.



The Transportation Fuels System in Transition





Considerations



Climate & Health

Avoid backsliding
on commitments



Consumers

Protection from
price volatility



Labor

Job security during
rapid change



Communities

Clarity on future of
local infrastructure



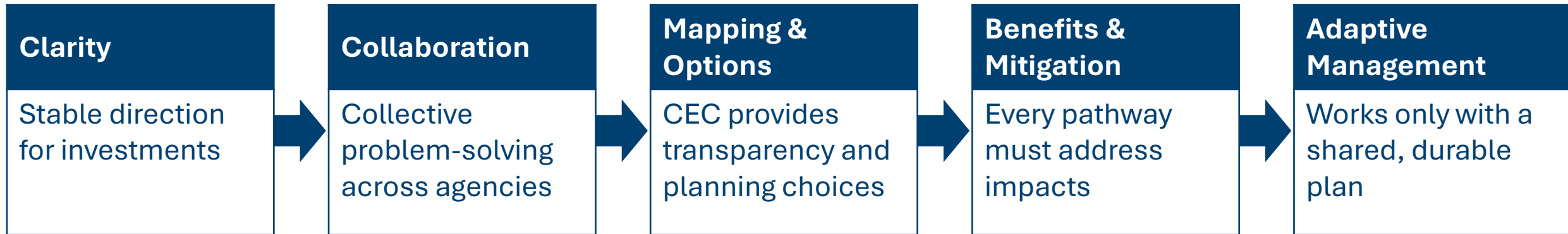
Industry

Operational certainty
and clear trajectory

Shared challenge:
**Reliable, affordable
and orderly transition**



What's Needed: A Durable Trajectory



A durable trajectory reduces uncertainty and helps avoid repeated crisis management



The Crossroads & the Path Forward

Decisions made in the next few years will define whether the transition is managed or reactive

Repeated Crises

- Reactive signals
- Siloed work
- Short-term mitigation
- Higher uncertainty



Orderly Transition

- Durable signals
- Shared plan
- Coordinated agencies
- Proactive mitigation

**This work relies on a village: CARB, CalGEM,
Dept of Industrial Relations, Air Districts,
DPMO, and others**



Key Takeaways

- Special session tools brought transparency and allows the CEC to design rules to stabilize supply and mitigate price spikes
- Transparency measures have been in place since June 2023 and have been broadened in 2024 and 2025
- The CEC worked with industry to keep prices stable in 2024 and 2025
- Loss of in-state capacity highlighted the need to think about the broader transition
- Holistic conversation with all stakeholders is needed to ensure California's success as the State works towards its climate goals



AB X2-1: Deeper Analyses

Enhanced refinery maintenance and resupply plan analysis



Today's Workshop Objective

Review the current analysis framework, explain recommendations, and collect input from the dais, stakeholders, and the public



Supply Stabilization Efforts

The CEC was working on resupply before and after AB X2-1 passage



Key Takeaway:

Even without formal rules in place, the CEC has consistently worked with industry to ensure that planned turnarounds have adequate resupply.



Resupply Planning

Reducing supply-driven price pressure during planned outages

1

Plan Ahead

Requires refiners to identify replacement fuel during planned refinery outages.

2

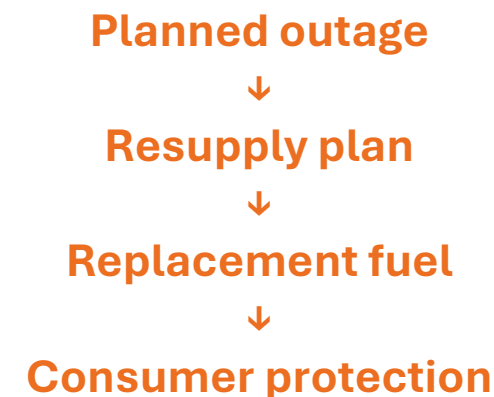
Maintain Supply

Supports fuel reliability and reduces the risk of avoidable shortages or price spikes.

3

AB X2-1 Authority

Establishes CEC authority and works alongside minimum inventory requirements for unexpected disruptions.



Core Message

Resupply planning is about having replacement fuel identified before a planned refinery outage creates a supply gap



Transportation Fuels Assessment



Supply Reliability

Assesses whether California has sufficient fuel supply across transportation fuel types under various scenarios



Price Affordability

Evaluates factors driving price volatility and options to protect consumers from disruptions



Transition Planning

Analyzes strategies to ensure reliable, affordable fuel supply as California transitions away from petroleum

Required under SB X1-2, expanded under AB X2-1 and SB 237