

DOCKETED	
Docket Number:	23-ICFAC-01
Project Title:	Independent Consumer Fuels Advisory Committee
TN #:	272861
Document Title:	Presentation for the Independent Consumer Fuels Advisory Committee Meeting - Transportation Fuels Assessment
Description:	The California Energy Commission (CEC) will host a meeting of the Independent Consumer Fuels Advisory Committee (ICFAC) to review and discuss the Transportation Fuels Assessment, other petroleum-focused efforts, and solicit initial thoughts from the ICFAC members. In-person participants may join the meeting at the California Natural Resources Agency Building, 715 P Street, Second Floor, Room 2-221 (Right Conference), Sacramento, California 95814. Remote participants may join via Zoom at https://energy.zoom.us/j/82356708059?pwd=EqNxkK3NHIXxioBON3YIAMFtXXbRwJ.1 or by phone at (888) 475-4499. When prompted, enter the Webinar ID 823 5670 8059 and passcode 544621.
Filer:	Isabella Bianchi
Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	9/18/2026 4:06:34 PM
Docketed Date:	9/18/2026



Independent Consumer Fuels Advisory Committee Meeting

September 21, 2026



Housekeeping

- This meeting is being recorded.
- Attendees may participate today by making comments during public comment period.



Introduction of New ICFAC Member



Tiffany Roberts

Governor's Office Appointee

A member representing the California petroleum fuels industry



Agenda

- Opening Comments
- Overview of the Transportation Fuels Assessment
- Committee Discussion on the Transportation Fuels Assessment
- Open Forum
- Public Comment
- Closing Remarks



Opening Comments



2027 Transportation Fuels Assessment

A playbook for managing California's petroleum transition

Independent Consumer Fuels Advisory Committee

Energy Assessments Division | September 21, 2026



Purpose of Today's Discussion

“The Independent Consumer Fuels Advisory Committee ... shall provide input to the commission in preparation of the assessment [the Transportation Fuels Assessment] required by subdivision (a).”

PUBLIC RESOURCES CODE SECTION 25371(e), AS AMENDED BY SB 237 (2025)

Statutory consultation

ICFAC provides input during preparation of the assessment.

Today's focus

Framing, proposed evaluation, and open analytical questions.

Your contribution

Advice that shapes the assessment before draft release.



What is the Transportation Fuels Assessment



Every three years

To the Legislature and the Governor



Second edition

Extends the 2024 assessment



In preparation now

Your input will shape the outcome

WHAT IT IS

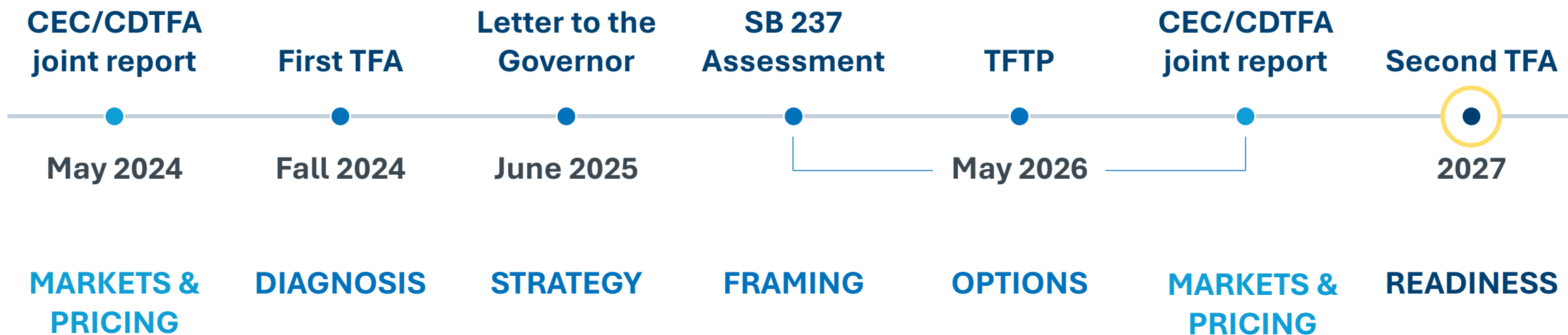
- Infrastructure & supply readiness
- Markets & pricing
- Economic & social transition
- An updated state of play

WHAT IT IS NOT

- Not a forecast
- Not a position on any facility
- Not a commitment to use any option



Report Evolution Timeline



The 2027 TFA - A playbook for readiness and response



What changed since 2024

Three exits from conventional refining

- P66 Rodeo converted, 2024
- P66 Wilmington ceased refining, 2025
- Valero Benicia idled, 2026



22%

In-state gasoline refining capacity



3%

Gasoline demand



77%

Imports

Four rounds of legislation

SB X1-2 · AB X2-1 · AB 30 ·
SB 237

Holistic transition framework

Supply reliability, infrastructure,
workers, & communities

Growing import dependence

More of California's fuel supply
must be supported by marine
imports



Why a playbook

A Holistic Transition – With a Critical Readiness Gap

Transition is broader than supply

California's petroleum transition spans supply and infrastructure, markets and pricing, and impacts on workers, communities, and the economy

Progress has been made

Recent efforts have advanced key transition areas, and the TFA brings them together into one integrated assessment

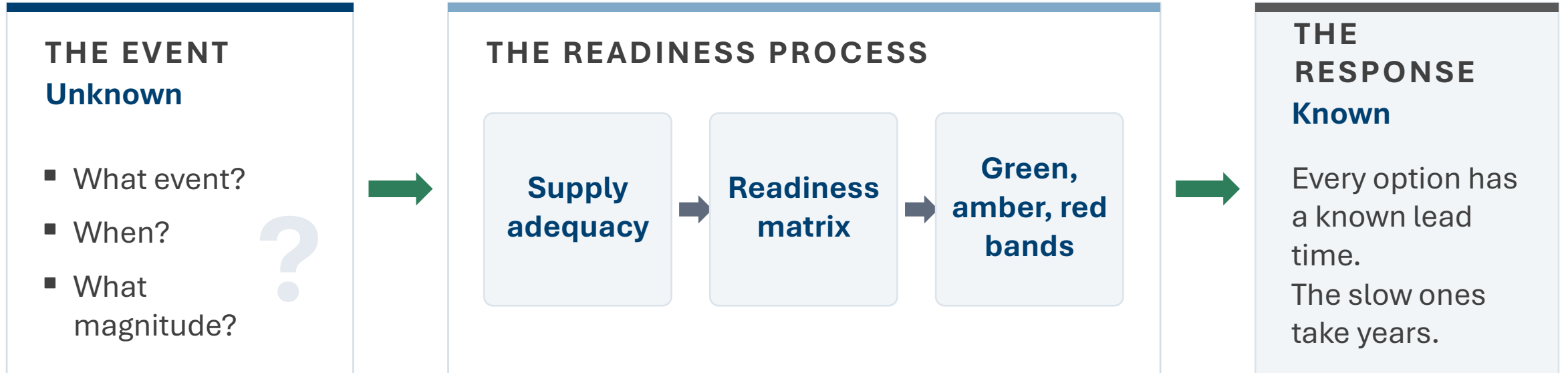
Supply readiness needs a playbook

A critical gap is ensuring supply and infrastructure options are ready when needed.



Connecting the event to the response

PLAYBOOK





Events and supply adequacy

THE EVENT

Supply shocks can take many forms

- Global supply constraints
- Port disruptions
- Terminal or storage loss
- Capacity losses from refinery closures
- Supply disruptions from unplanned maintenance



SUPPLY ADEQUACY

Four immediate questions the State needs to answer

Is replacement supply available?

Global supply, source regions, trade dynamics



Can it be transported here?

Voyage times, vessel availability, shipping economics



Can it be received and stored?

Berths, docks, terminal capacity, time at berth



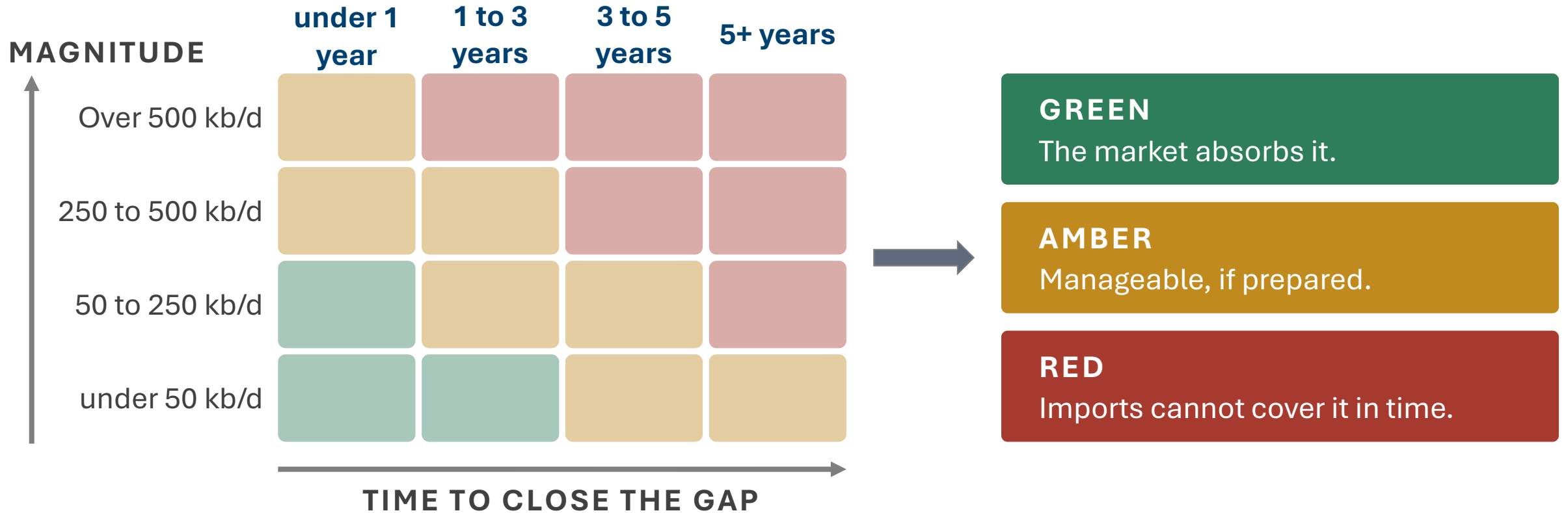
Can it be distributed inland?

Pipelines, distribution terminals, regional separation



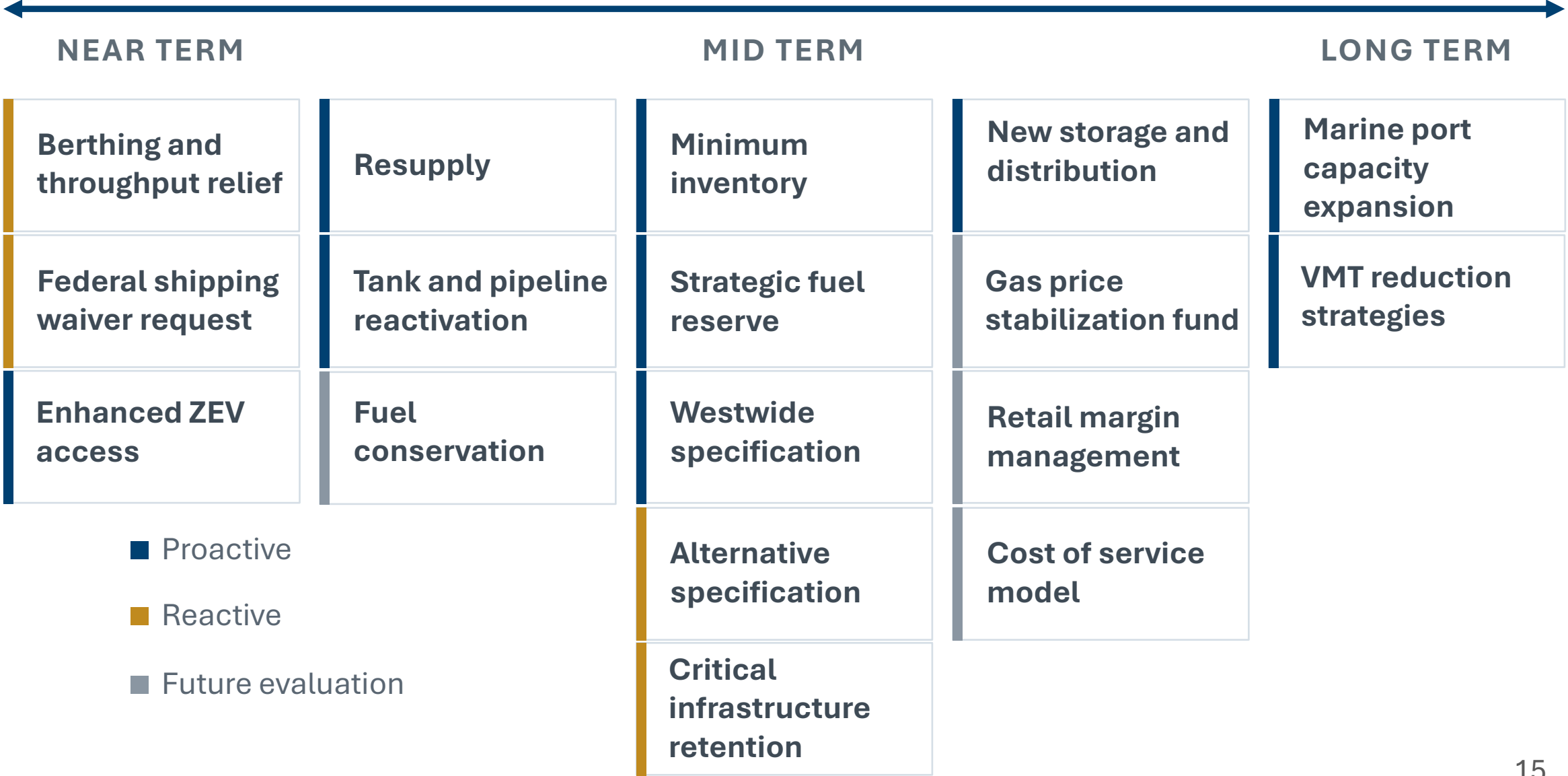


The readiness matrix





Response lead times





Where the analysis is still being developed

Marine imports

Can the existing infrastructure handle the imports
California needs now and in the future?

Inland distribution

Pipeline connectivity and the separation between
Northern and Southern California

Alternative specification

Analysis underway with CARB

Community and workforce impacts

In coordination with other agencies

Infrastructure investments

What would it take to build?

Minimum inventory

Refinery-only price impact not yet isolated

Westwide specification

Analysis underway with CARB

Cost-benefit analysis

Not complete for every option



What we need from ICFAC

Key questions we seek input on:

1

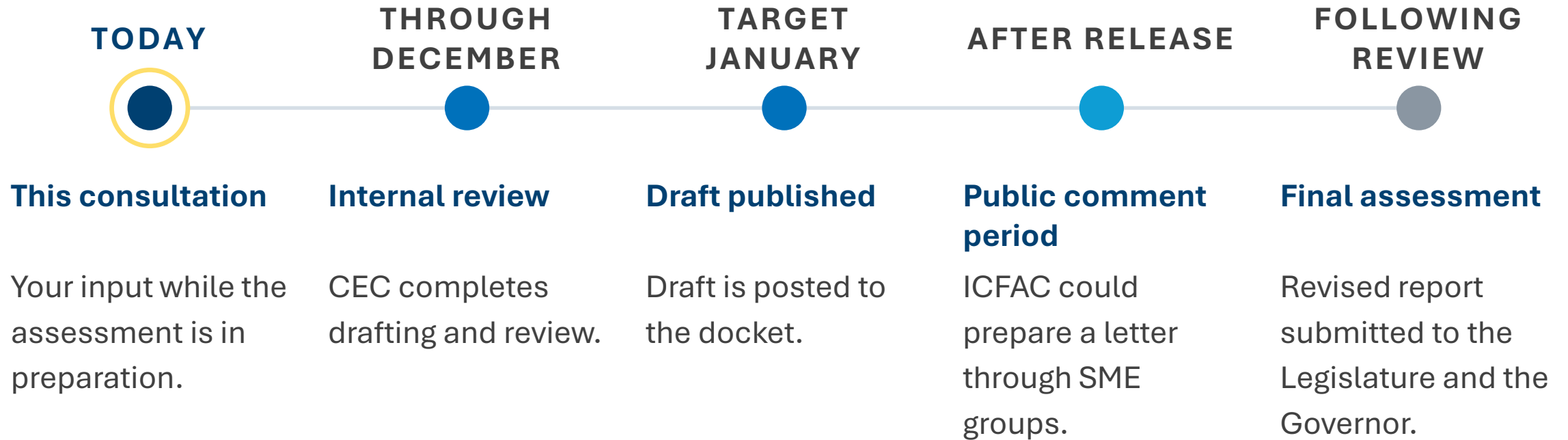
What policies are a priority from your perspective?

2

What should further analysis take into account?



What happens next





Thank you

Questions and discussion

Alex Haworth

Supervisor, Transportation Fuels Data Analysis Unit
Fuels Analysis Branch, Energy Assessments Division
California Energy Commission



Committee Discussion on the Transportation Fuels Assessment



Open Forum



Written Comments and Upcoming ICFAC Meeting

Please submit written comments to:

- Docket No. 23-ICFAC-01
- Due by 5:00 p.m. on October 5, 2026

Next Quarterly ICFAC Meeting:

- January 26, 2027 at 2:00 p.m.



Closing Remarks