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Review of October PMAC Workshop

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Petroleum Market Advisory Committee Meeting
California Energy Commission
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Review of Essential Facts

Main Takeaways from Workshop



EIA's conclusions about the market

Stillwater Associates LLC

1. Geographic isolation
2. Unique product specifications
3. Reliance on in-region refinery production
4. Infrastructure limitations
5. When a disruption occurs, responses include:
 - a. Withdrawals from inventory, if available
 - b. Waterborne shipments from other local regions
 - c. Waterborne shipments from foreign sources
6. When PADD 5 fuel supply is disrupted:
 - a. Alternative supplies are far away
 - b. Wholesale prices increase more than in other PADDs





Statewide production and consumption

- Thirteen California refineries produce transportation fuels; capacity of 1.85 million barrels per day
- They produced an average of 40.2 million gallons of gasoline per day in 2014
- Statewide consumption was also 40.2 million gallons per day

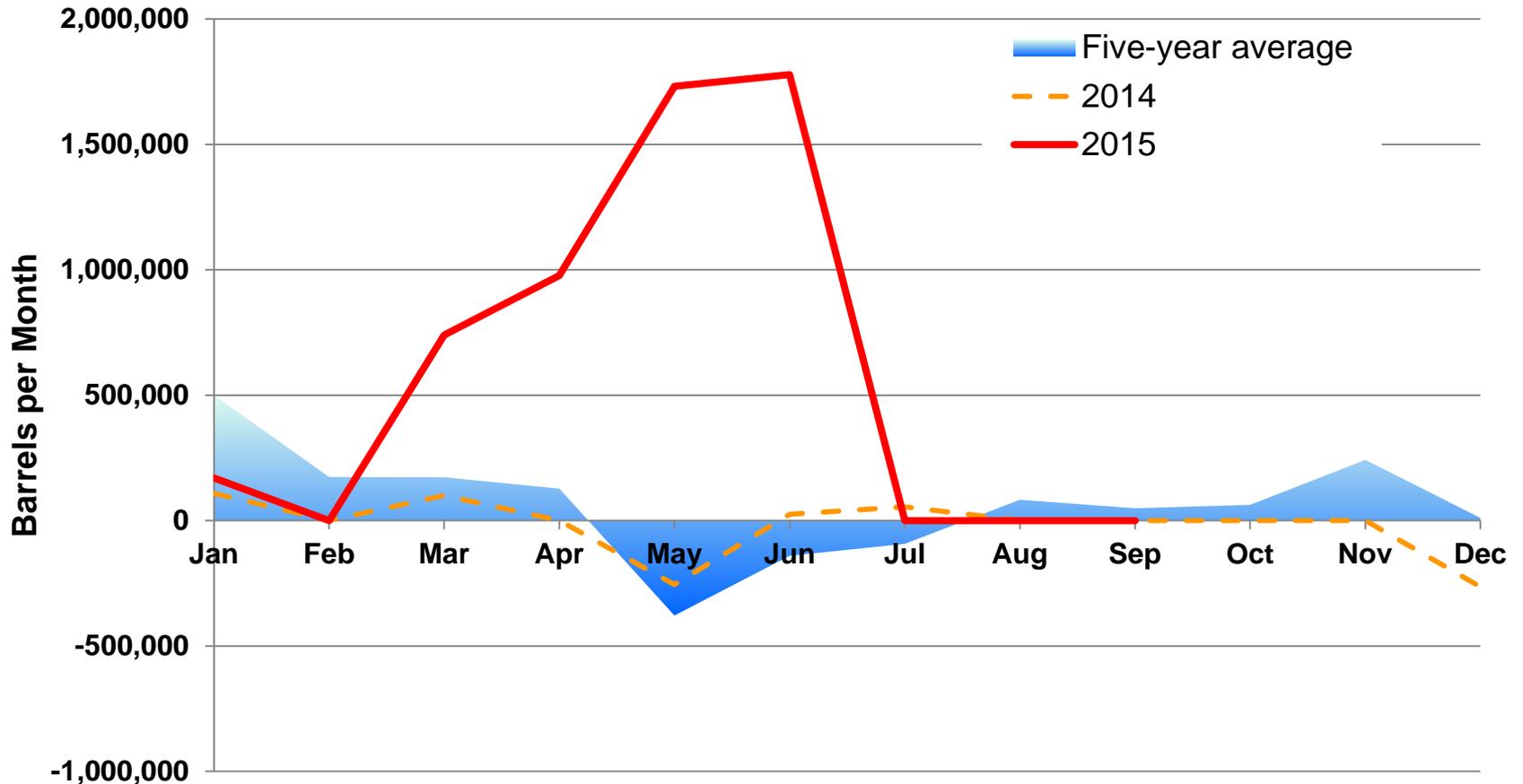


Southern California

- Southern California does not produce enough gasoline to meet its own demand; gasoline is routinely shipped into the area
- Gasoline is pipelined to Arizona, but this supply is increasingly being met by pipeline from the Gulf Coast
- No port congestion restricts gasoline imports
- No pipeline congestion



Southern California Gasoline & Blendstock Net Imports



Source: California Energy Commission



Questions?

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