



California Transportation Fuel Demand, Historic and Forecast

Joint Transportation and IEPR Committee Workshop
Demand and Fuel Infrastructure Requirements

Sacramento, California

August 24, 2009

DOCKET

09-IEP-1K

DATE AUG 24 2009

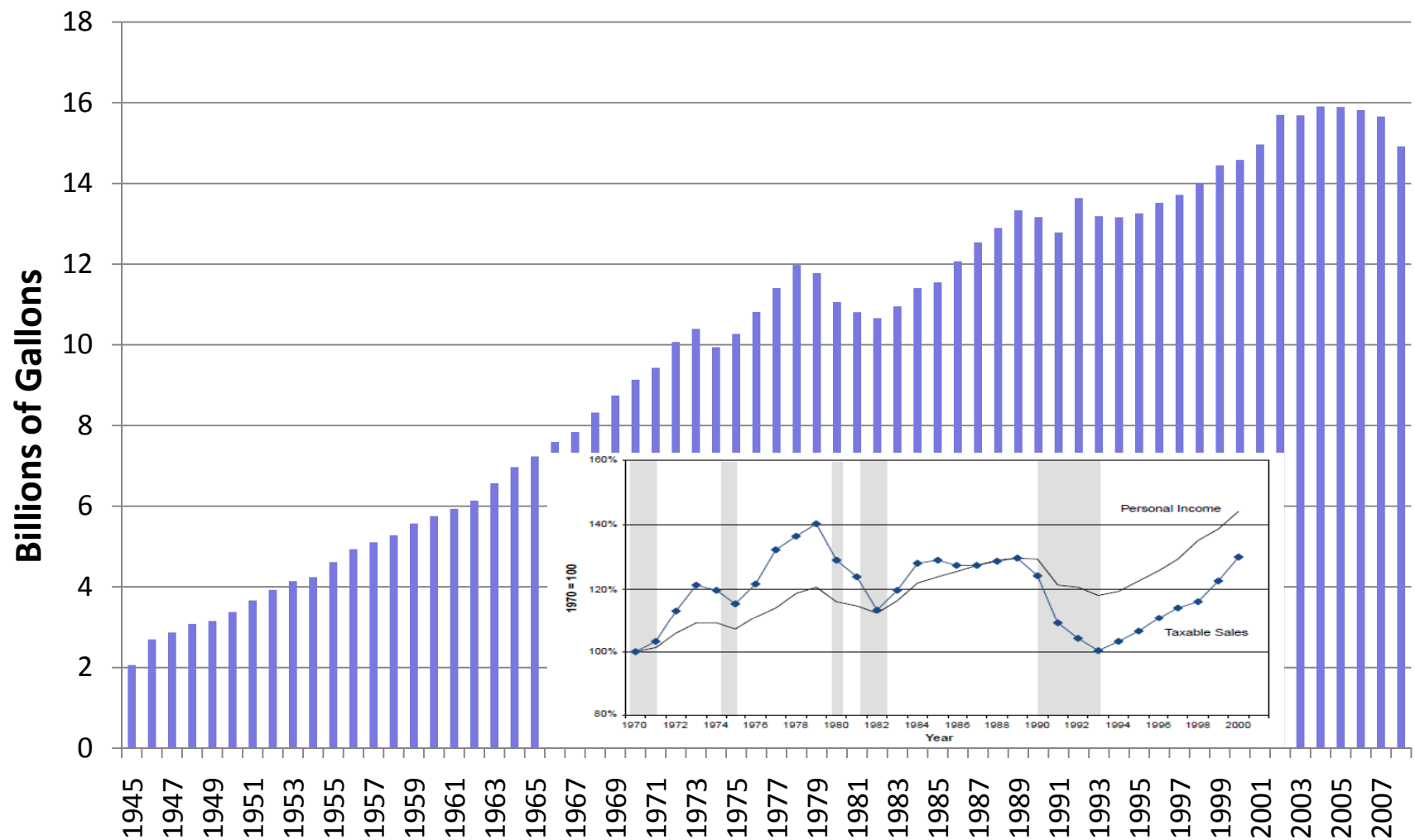
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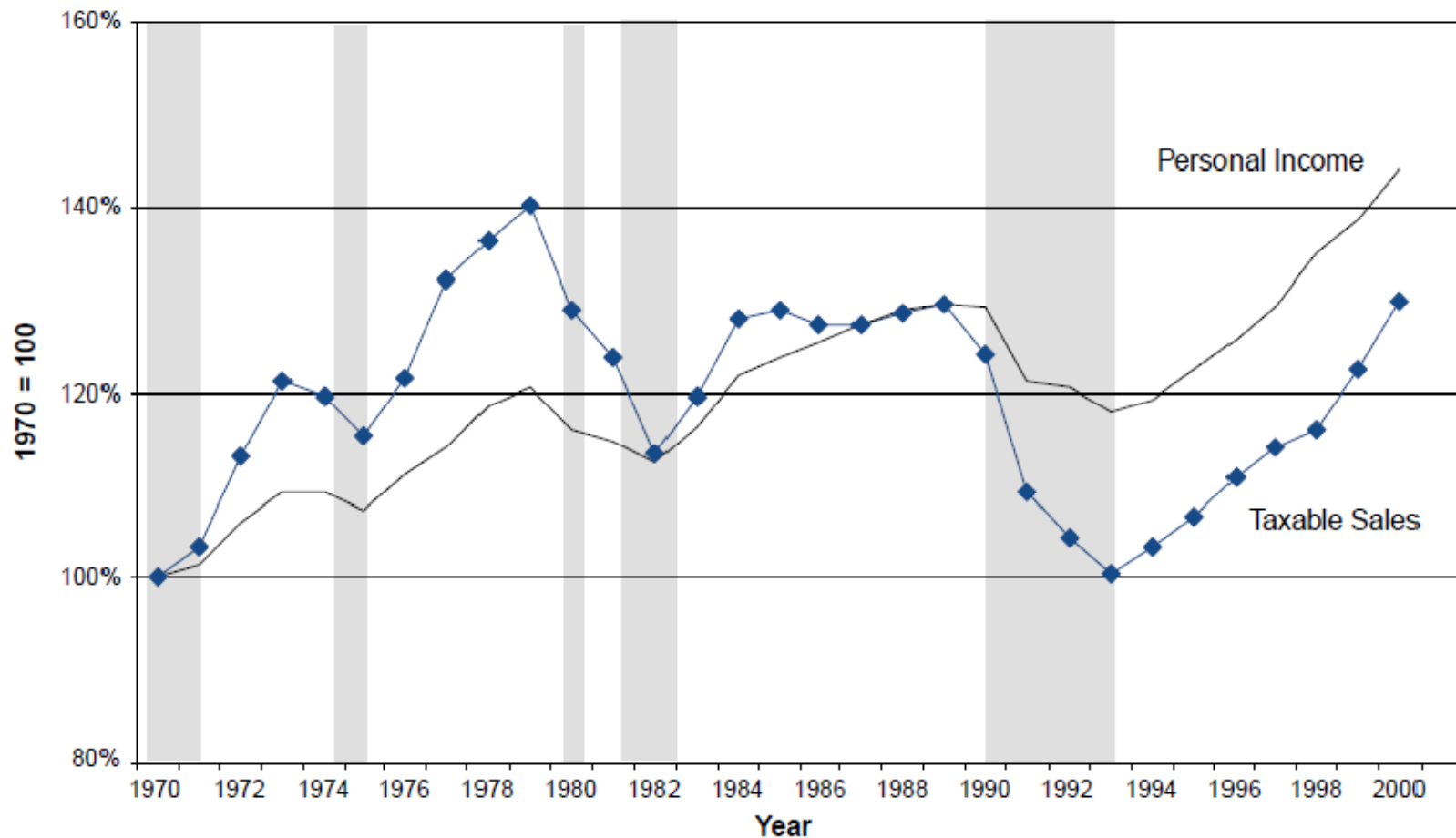
California Gasoline Demand and Recessions (1945-2008)



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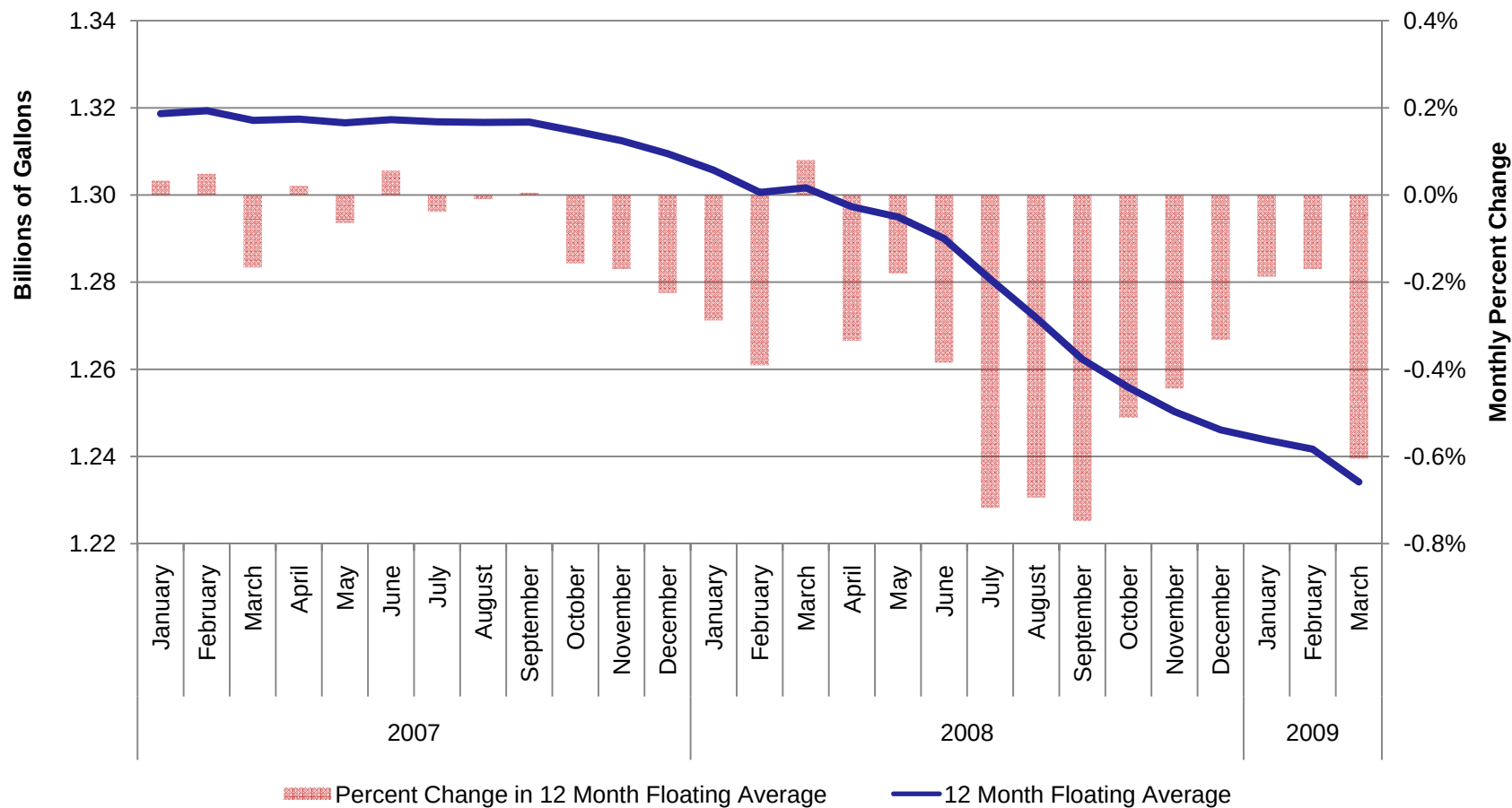


Real Taxable Sales and Personal Income Per Capita as a Percentage of 1970 (California Recessions Shaded)





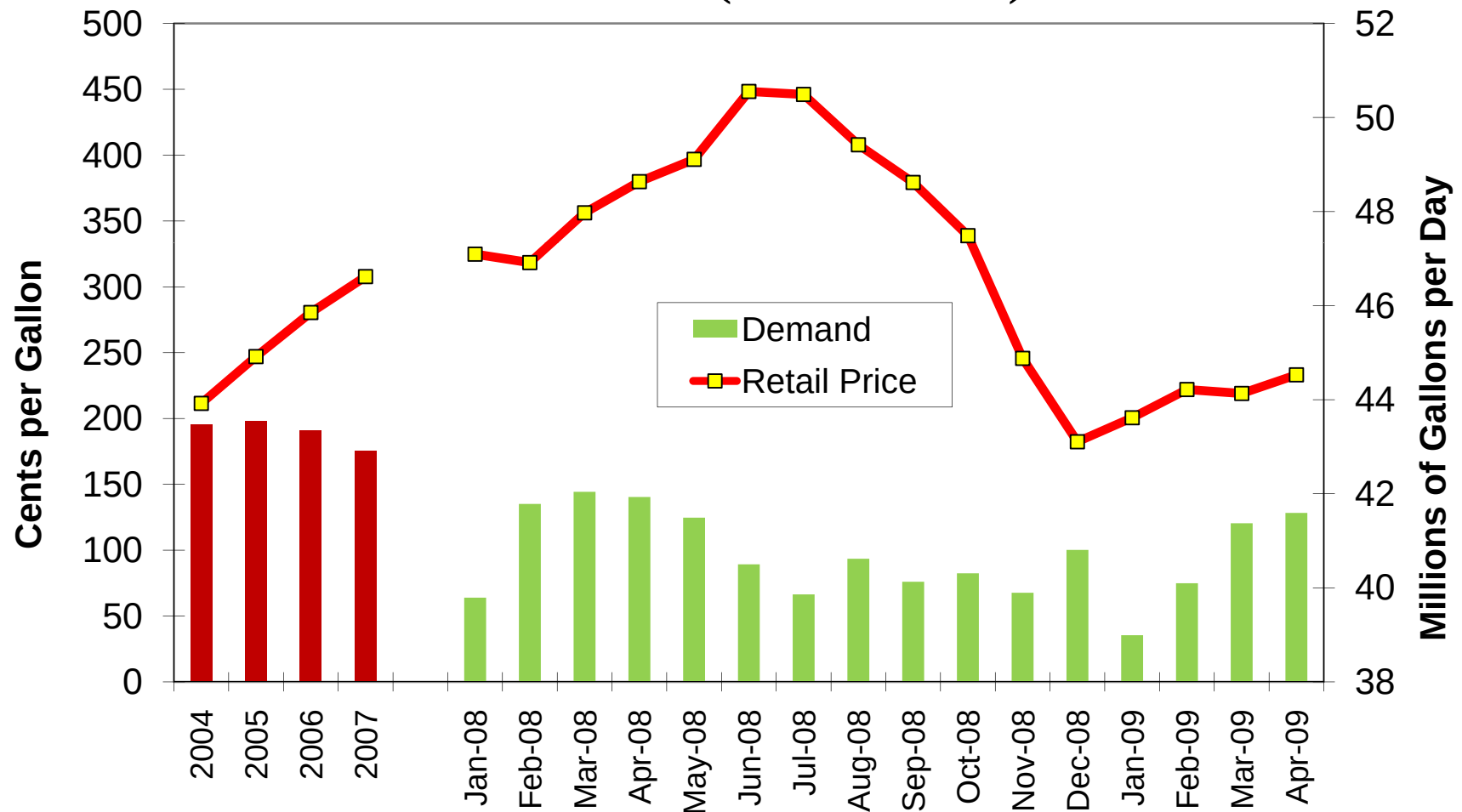
12 Month Floating Average of California Monthly Gasoline Consumption



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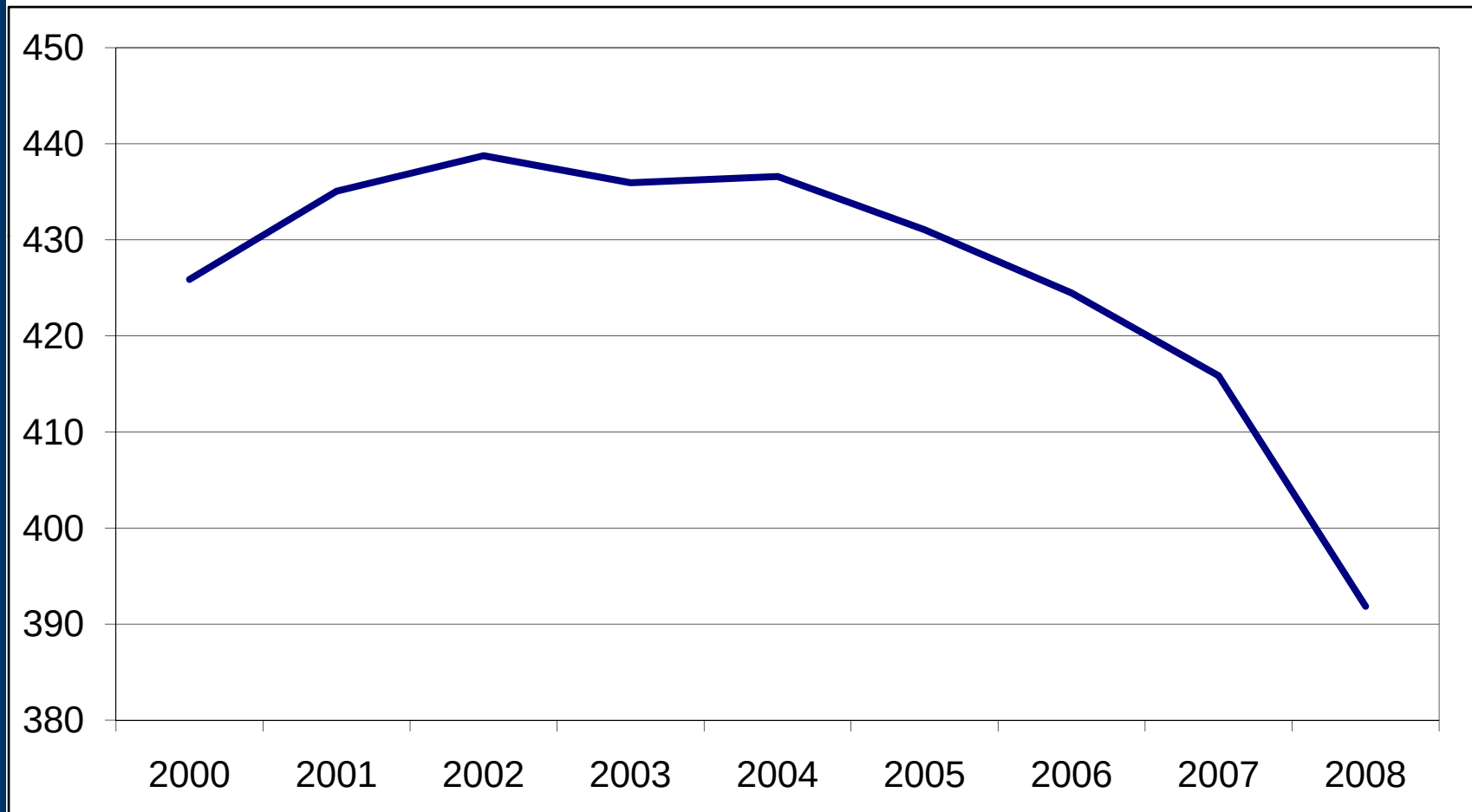
California Average Daily Gasoline Demand and Price (2004-2009)



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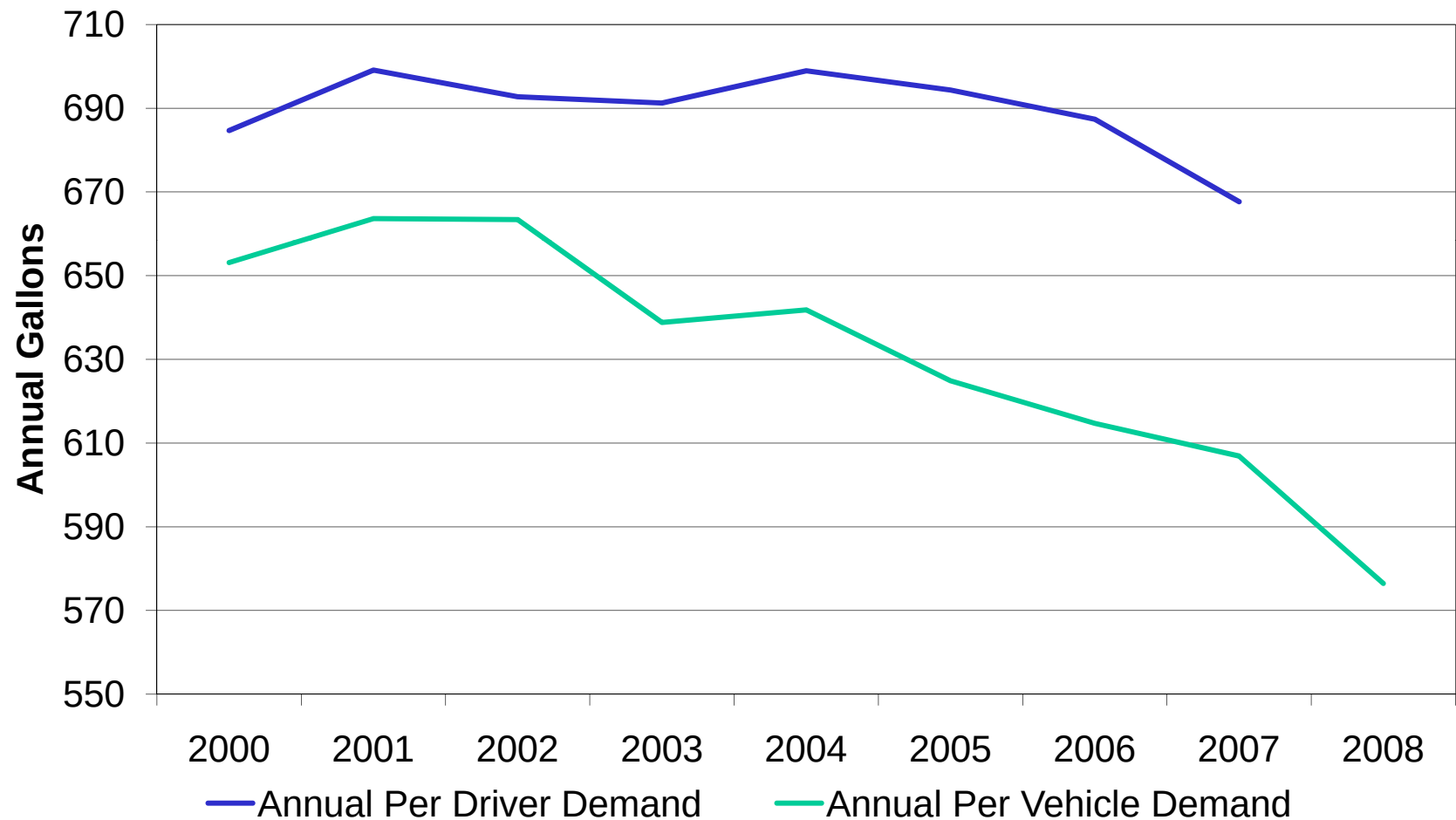
California Per Capita Gasoline Demand (Annual Gallons per Person)



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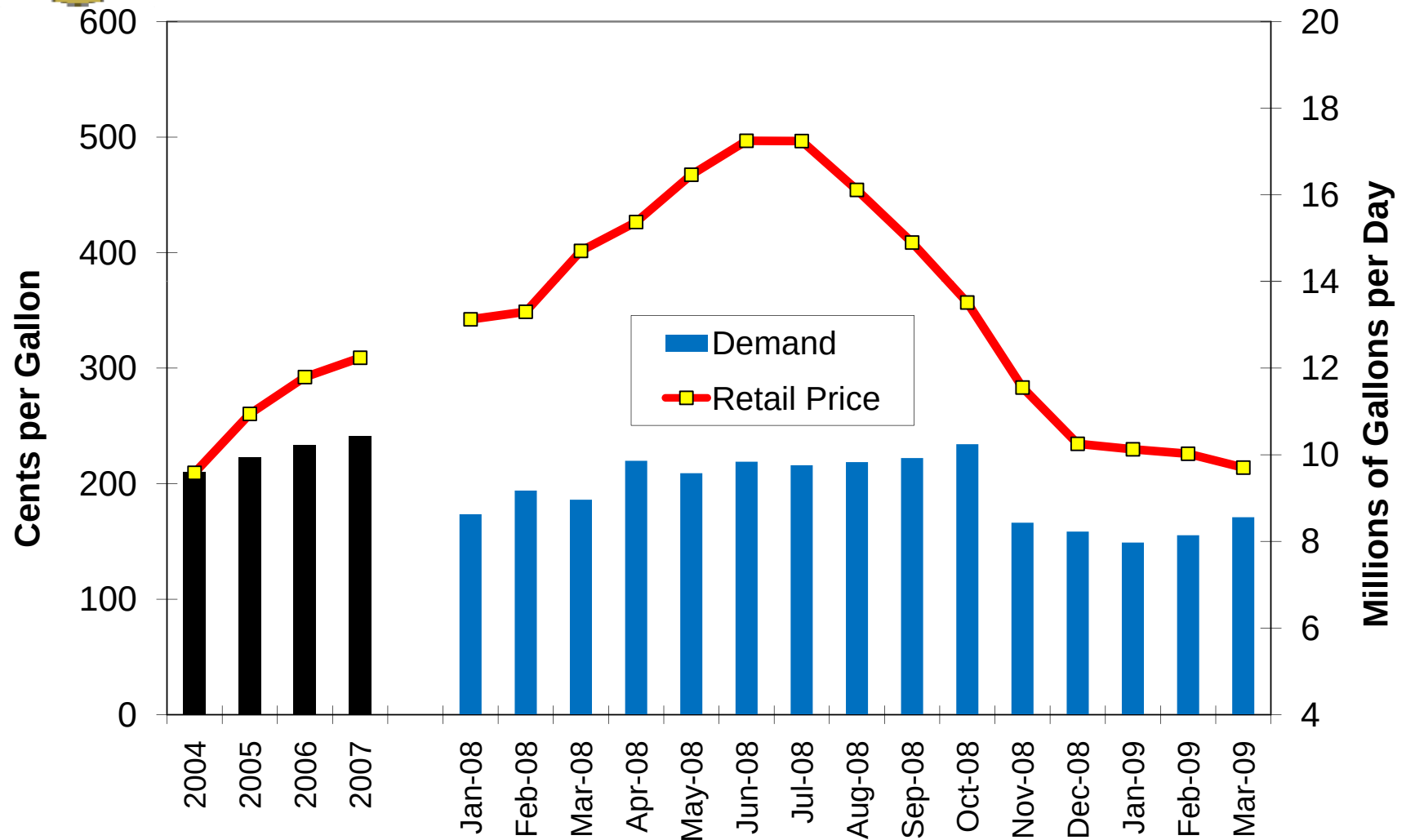
Per Vehicle and Per Driver Gasoline Demand (Annual Gallons)



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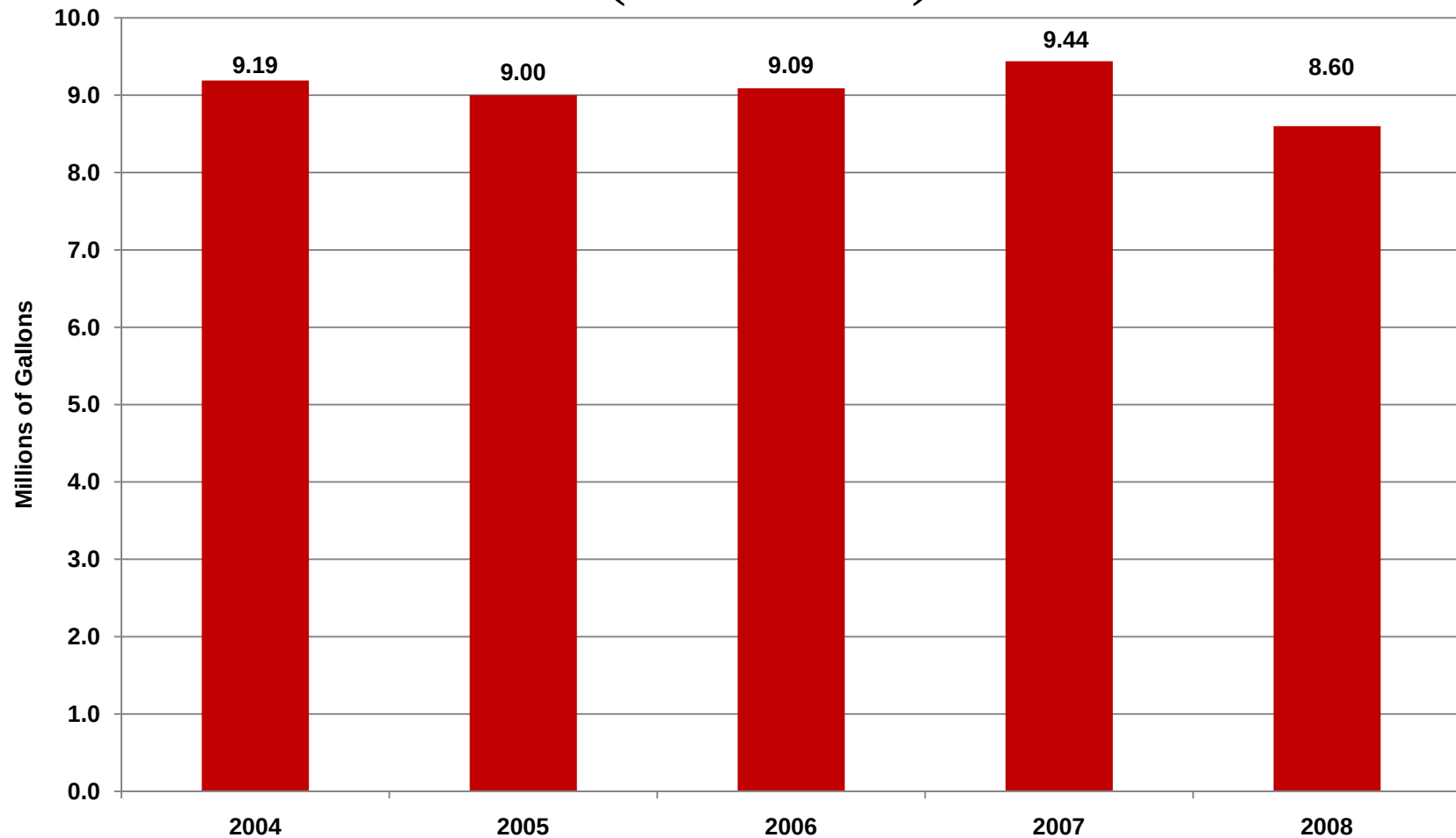
California Average Daily Diesel Demand and Price (2004-2009)



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California Commercial Jet Fuel (Jet A) Demand (2004-2008)



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Models and Methods Used for Forecast

As in previous forecasts, economic models form the basis of our forecast.

- CALCARS model: 2007 Low Demand Case was modified by current economic conditions.
- Freight model: updated economic growth estimates.
- Transit model: updated with new economic and transit agency data.
- Aviation model: new specification and updated economic and demographic data.

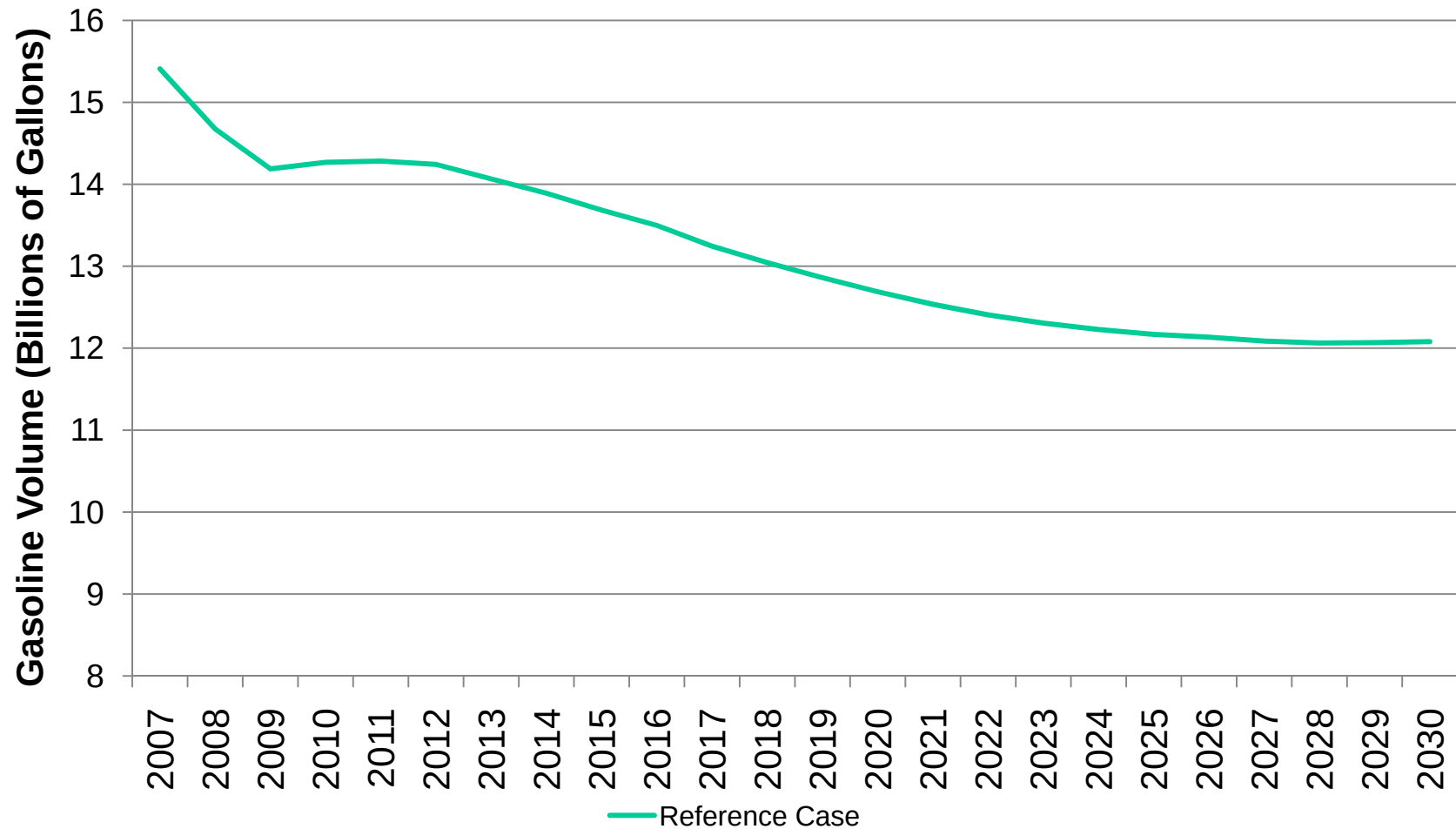


Draft Light-Duty Gasoline and Diesel Forecast Method

- 2007 and 2008: historic sales numbers
- 2009: high and low demand cases based on historic sales data
- 2010 through 2030:
 - reference case derived from 2007 low demand case annual growth rates
 - low and high gasoline and diesel demand cases developed from 15 and 20 percent bands, respectively



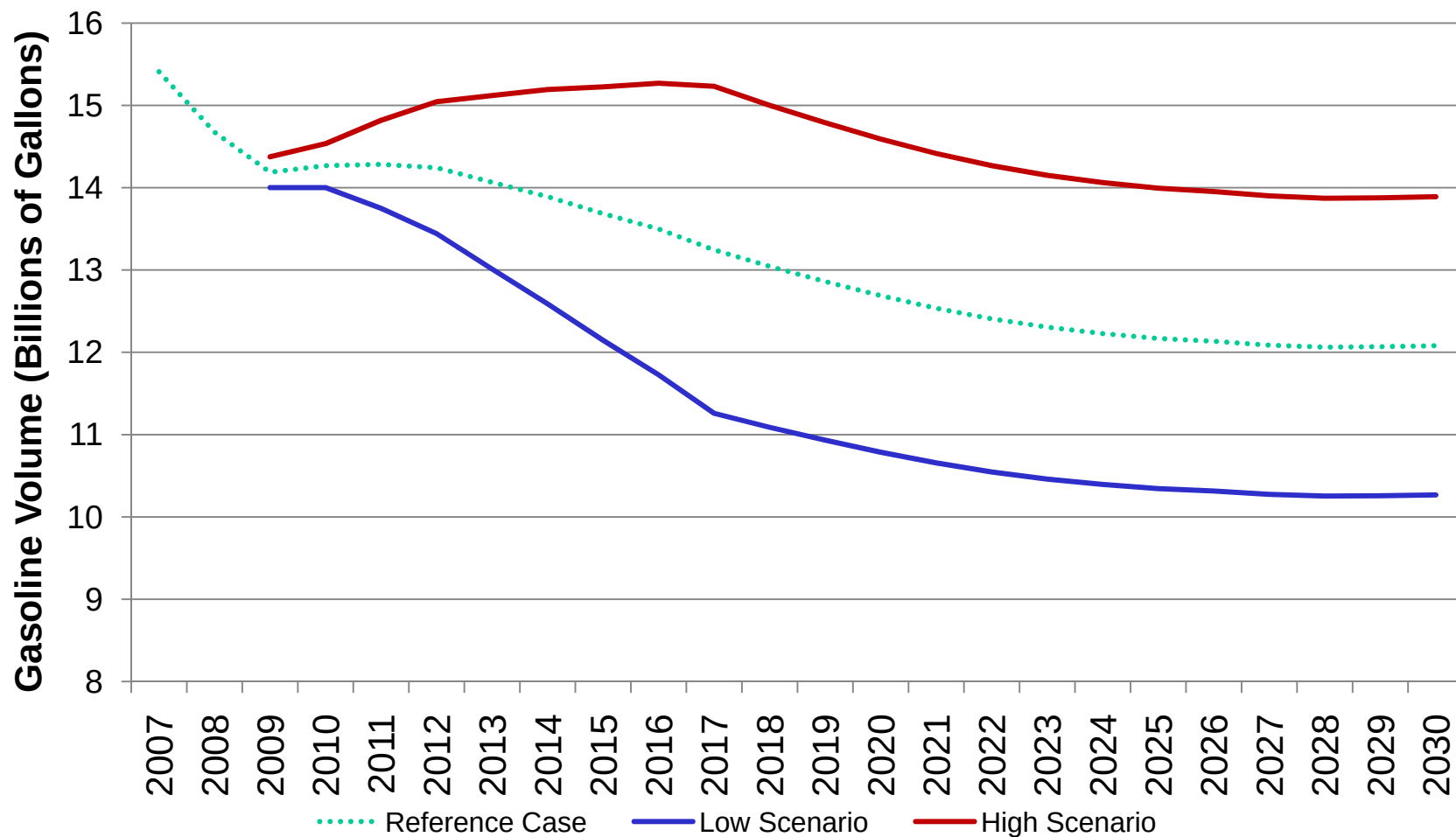
California Light-duty Gasoline Reference Case



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California Light-duty Demand Forecast



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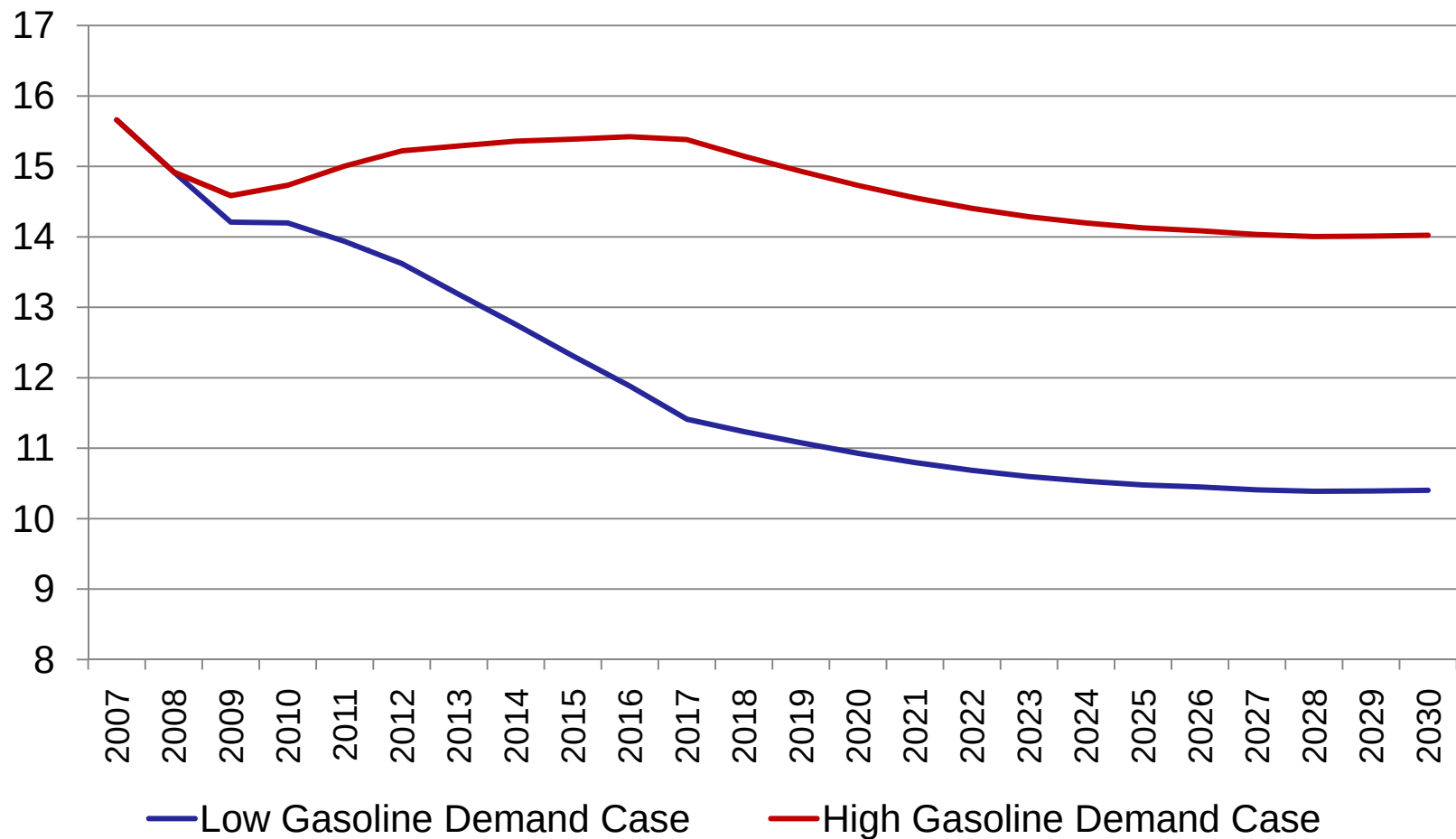
California Light-Duty Vehicle Gasoline Demand Forecast (Gallons)

Year	Low Demand Case	Change from Previous Value	High Demand Case	Change from Previous Value
2007	15,408,916,800		15,408,916,800	
2010	13,978,451,088	-9.28%	14,512,659,410	-5.82%
2015	12,126,644,866	-13.25%	15,201,005,537	4.74%
2020	10,767,884,875	-11.20%	14,568,314,831	-4.16%
2025	10,326,860,295	-4.10%	13,971,634,516	-4.10%
2030	10,251,291,084	-0.73%	13,869,393,820	-0.73%
Average Annual Growth Rate	-1.76%		-0.46%	

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Total California Gasoline Demand Forecast (Billion Gallons)



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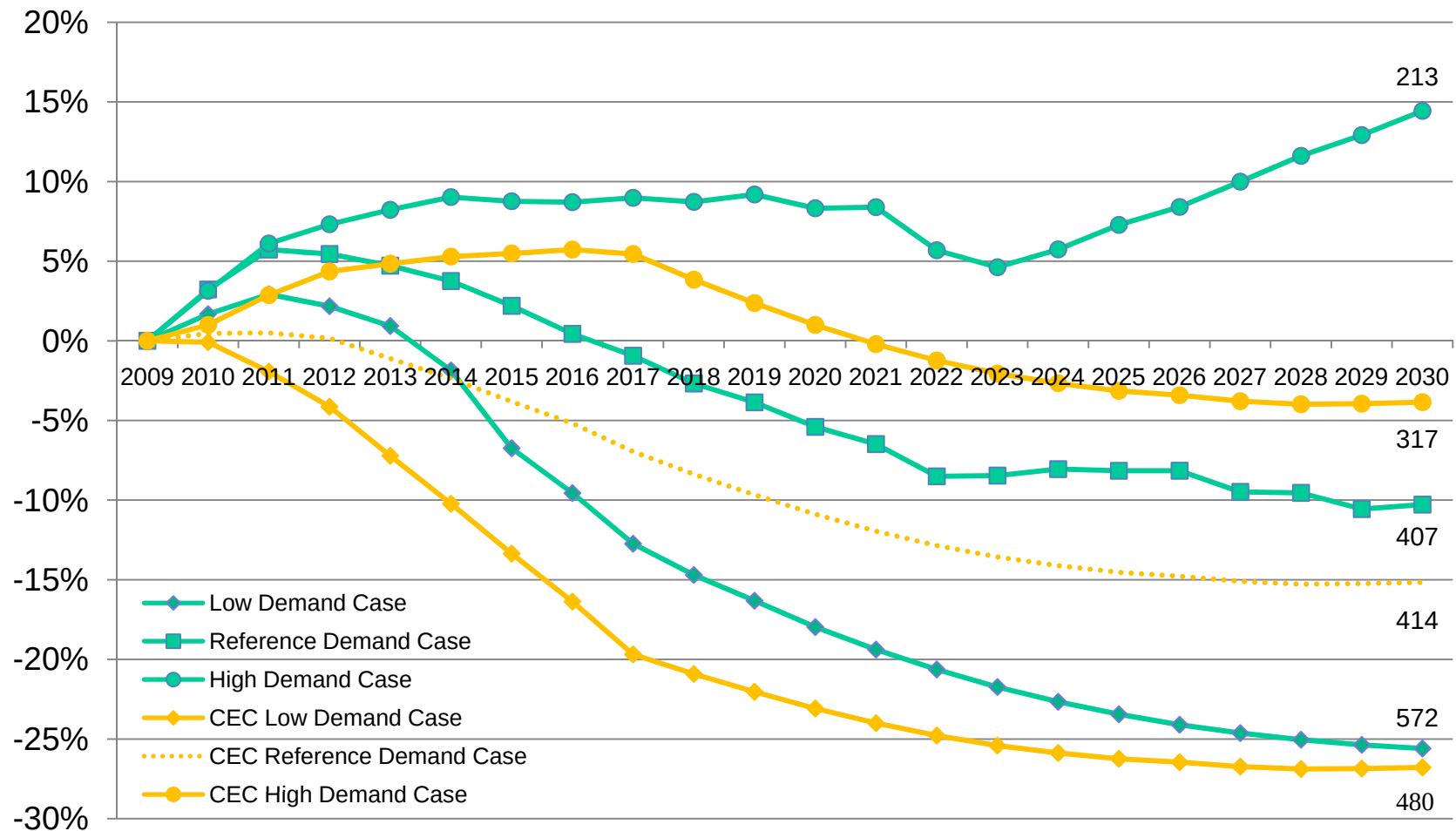


Total California Gasoline Demand Forecast (Gallons)

Year	Low Demand Case	Change from Previous Value	High Demand Case	Change from Previous Value
2007	15,658,306,800		15,658,306,800	
2010	14,196,621,088	-9.33%	14,731,069,410	-5.92%
2015	12,310,084,866	-13.29%	15,385,565,537	4.44%
2020	10,928,154,875	-11.23%	14,730,314,831	-4.26%
2025	10,479,320,295	-4.11%	14,126,394,516	-4.10%
2030	10,402,381,084	-0.73%	14,023,343,820	-0.73%
Average Annual Growth Rate	-1.76%		-0.48%	



Comparison of Energy Commission Gasoline Demand Forecast with EIA AEO Forecast



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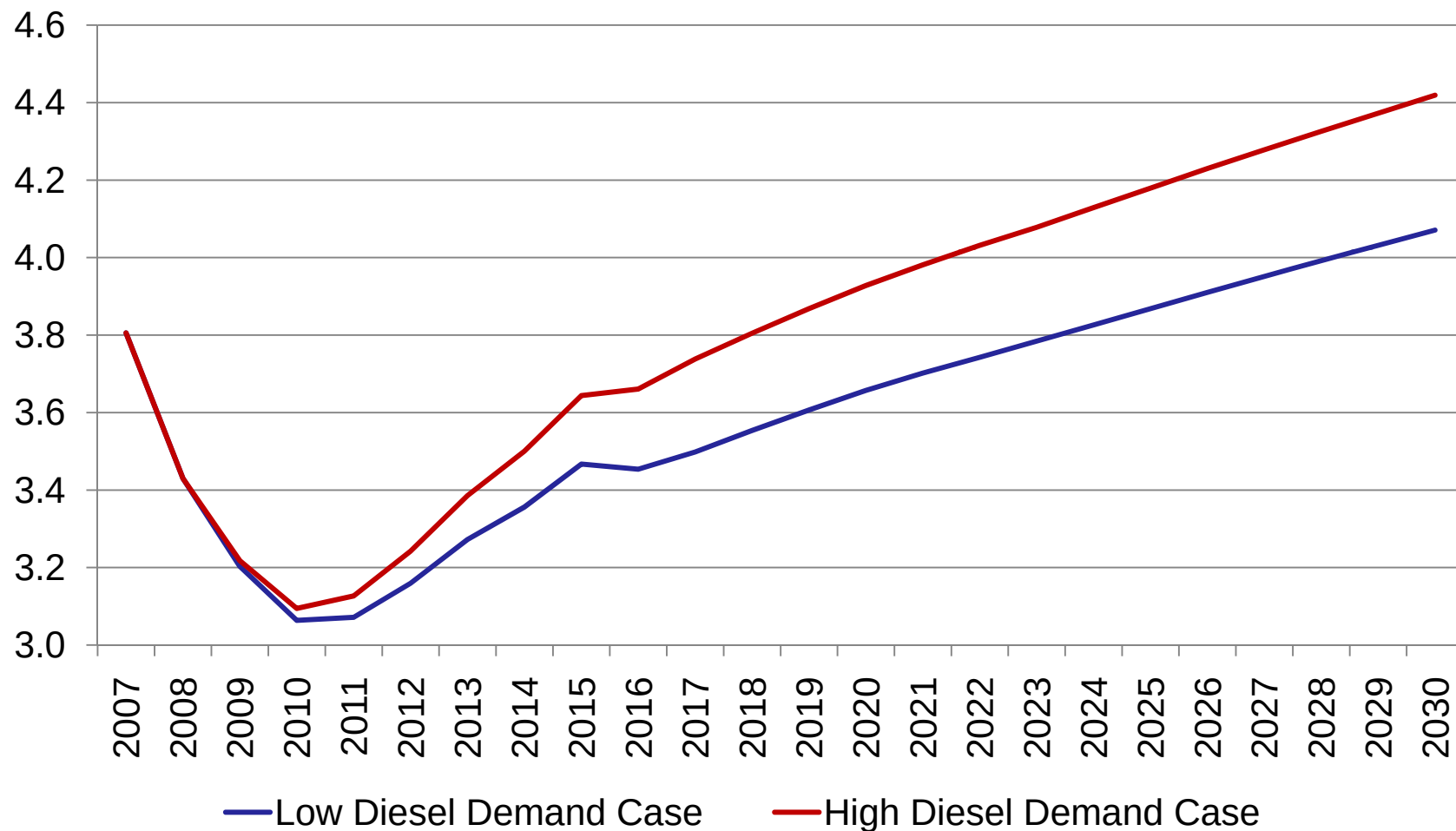
California Diesel Demand Forecast (Gallons)

Year	Low Demand Case	Change from Previous Value	High Demand Case	Change from Previous Value
2007	3,805,503,272		3,805,503,272	
2010	3,063,496,445	-19.50%	3,094,478,520	-18.68%
2015	3,466,779,643	13.16%	3,643,888,124	17.75%
2020	3,656,918,633	5.48%	3,927,647,794	7.79%
2025	3,868,000,344	5.77%	4,179,211,849	6.40%
2030	4,070,671,562	5.24%	4,418,944,141	5.74%
Average Annual Growth Rate	0.29%		0.65%	

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California Diesel Demand Forecast (Billion Gallons)



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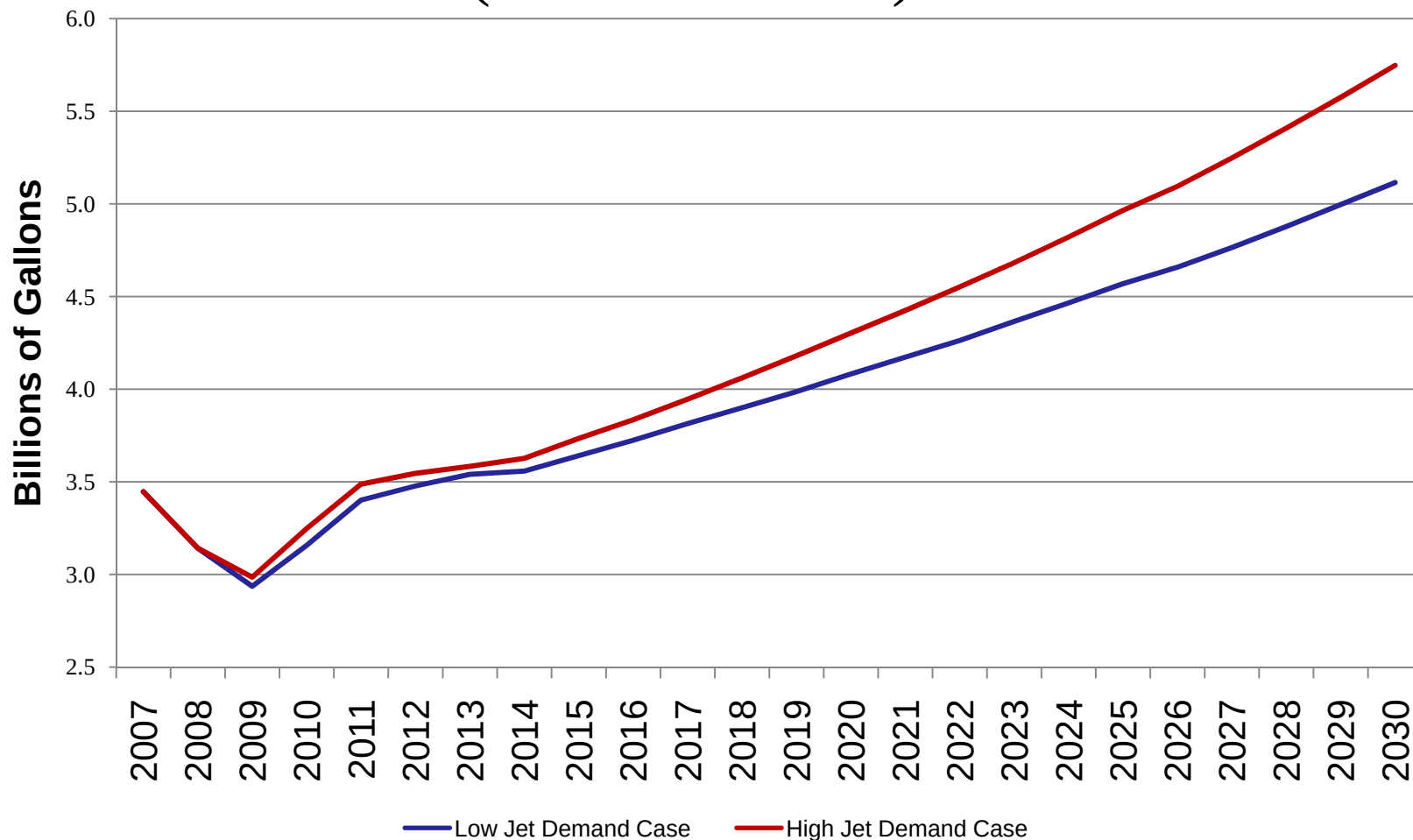


California Jet Fuel Demand Forecast (Gallons)

Year	Low Demand Case	Change from Previous Value	High Demand Case	Change from Previous Value
2007	3,446,593,006		3,446,593,006	
2010	3,156,383,966	-8.42%	3,247,229,634	-5.78%
2015	3,641,014,703	15.35%	3,733,969,879	14.99%
2020	4,081,988,183	12.11%	4,302,667,349	15.23%
2025	4,569,339,667	11.94%	4,964,917,236	15.39%
2030	5,115,783,871	11.96%	5,748,285,636	15.78%
Average Annual Growth Rate	1.73%		2.25%	



California Jet Fuel Demand Forecast (Billion Gallons)



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Questions

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