

Annual Energy Outlook 2011

Liquid Fuels and Transportation Insights



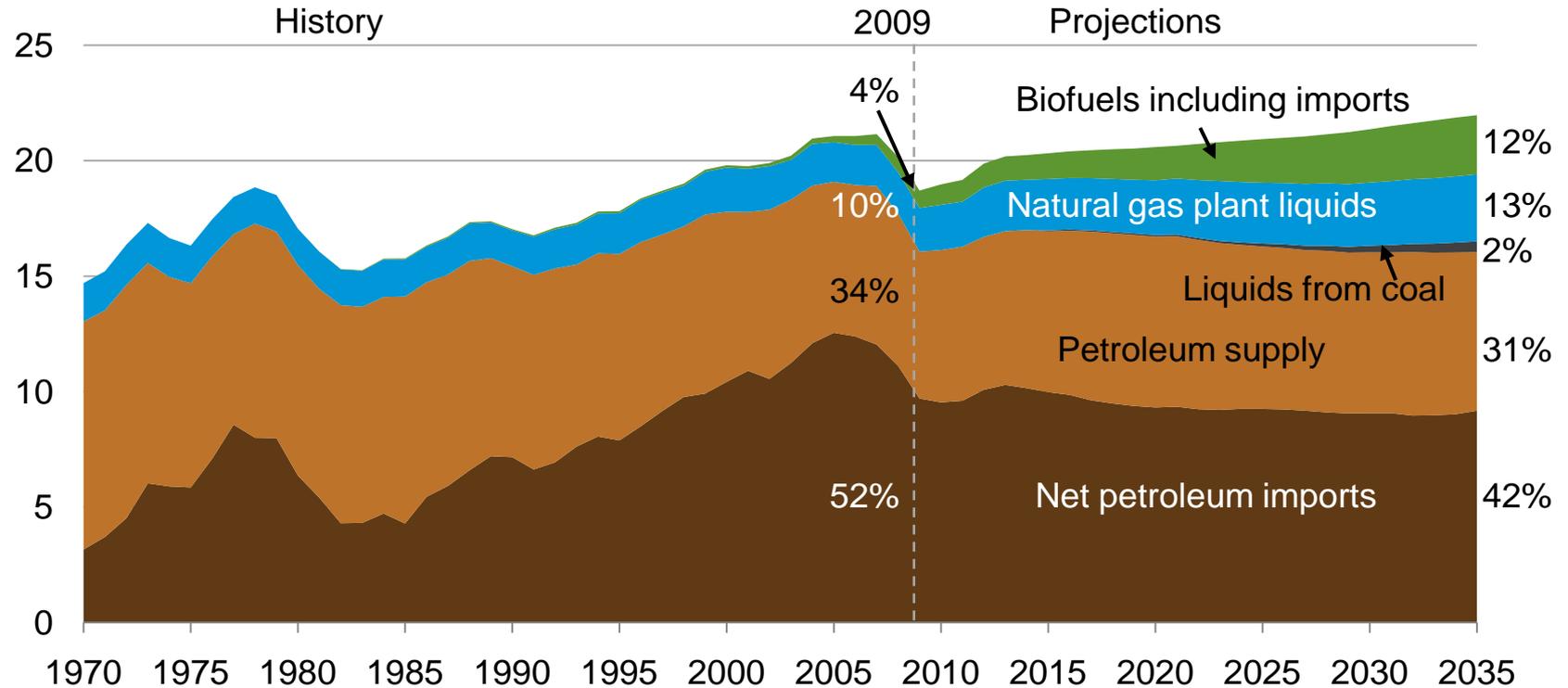
for National Lieutenant Governors Association

Howard Gruenspecht, Deputy Administrator

March 24, 2011 | Washington, DC

With the exception of biofuels, projected U.S. liquid fuel use is stagnant in AEO2011 due to rising fuel efficiency.

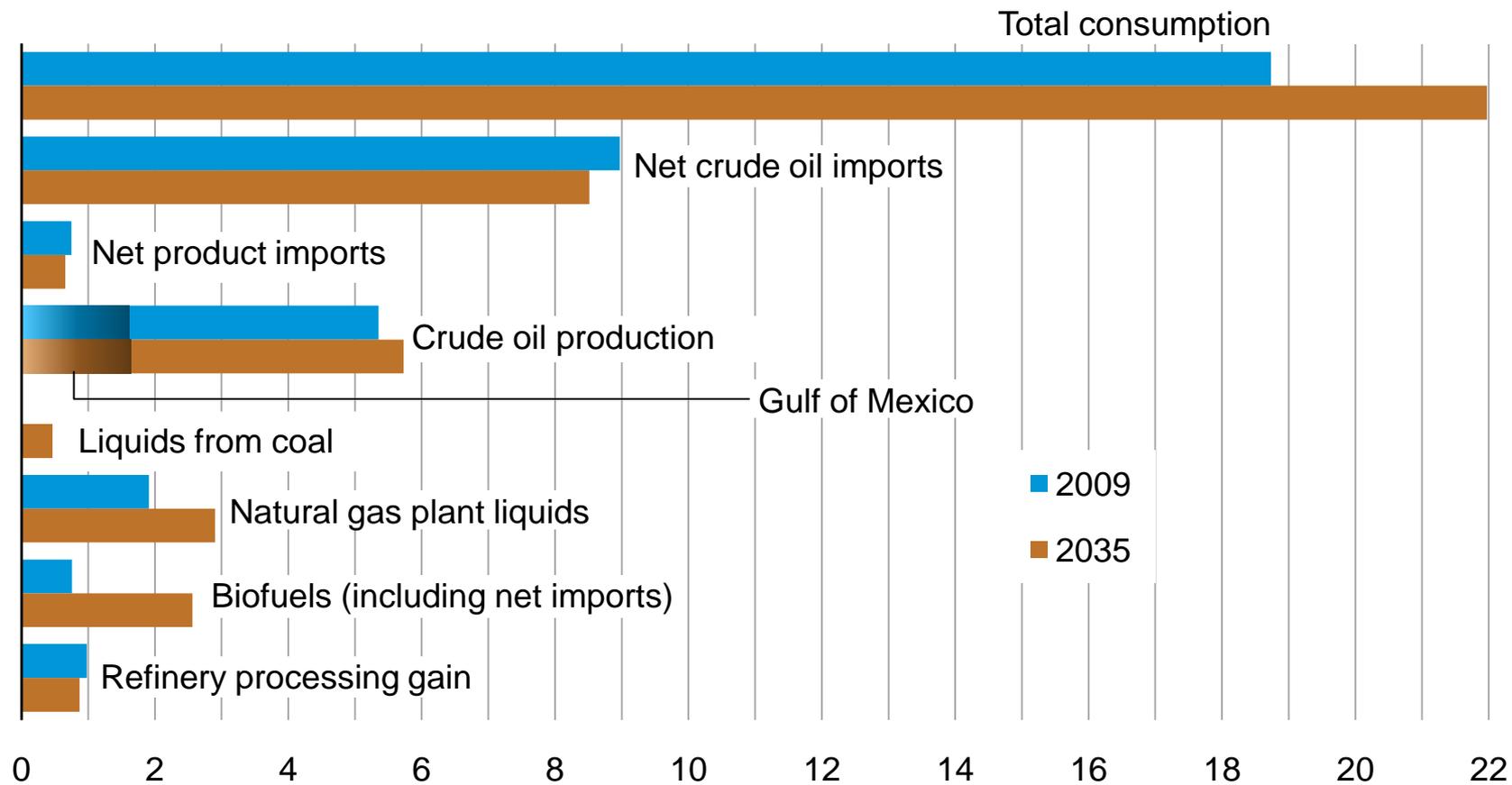
U.S. liquid fuels consumption
million barrels per day



Source: EIA, Annual Energy Outlook 2011

Biofuels, natural gas liquids, and crude oil production are key sources of increased domestic liquids supply

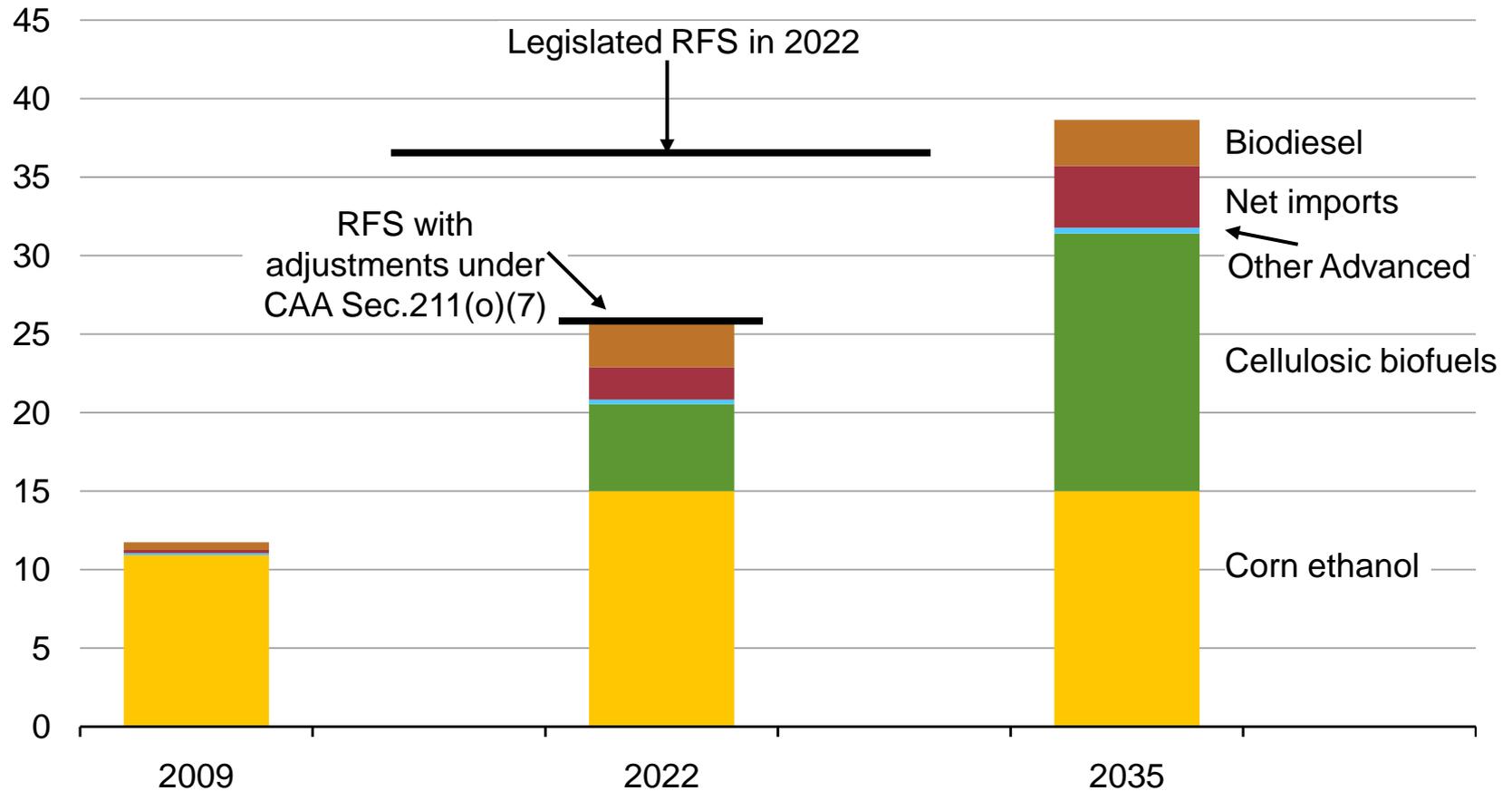
U.S. liquid fuels
million barrels per day



Source: EIA, Annual Energy Outlook 2011

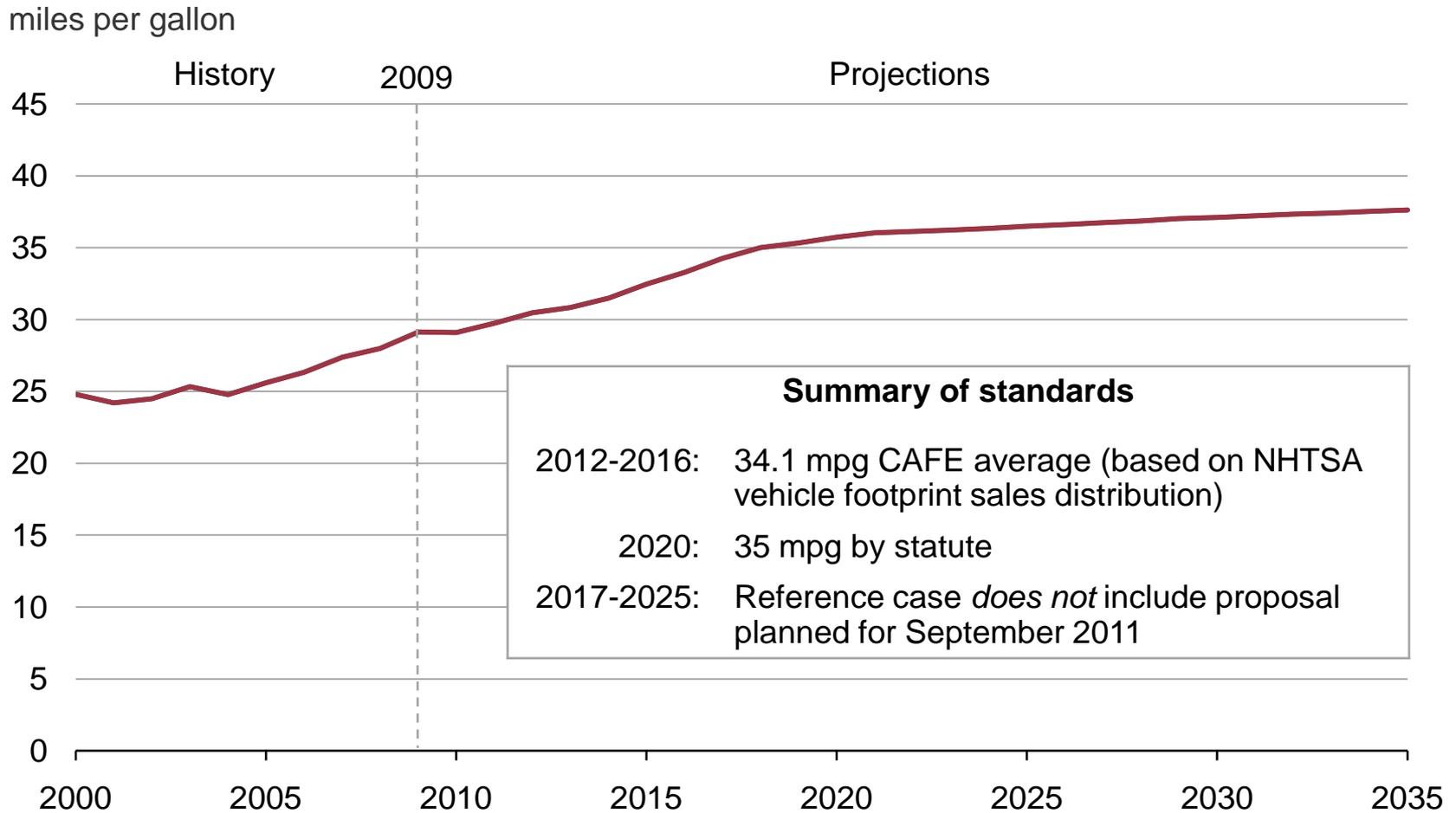
Biofuels fall short of the goal in 2022, but exceed the 36 billion gallon RFS target by 2030

billions ethanol-equivalent gallons



Source: EIA, Annual Energy Outlook 2011

New light duty vehicle fuel economy achieves almost 38 mpg by 2035 in the Reference case



Source: EIA, Annual Energy Outlook 2011

Efficiency improvements partially offset underlying drivers of growth in transportation services

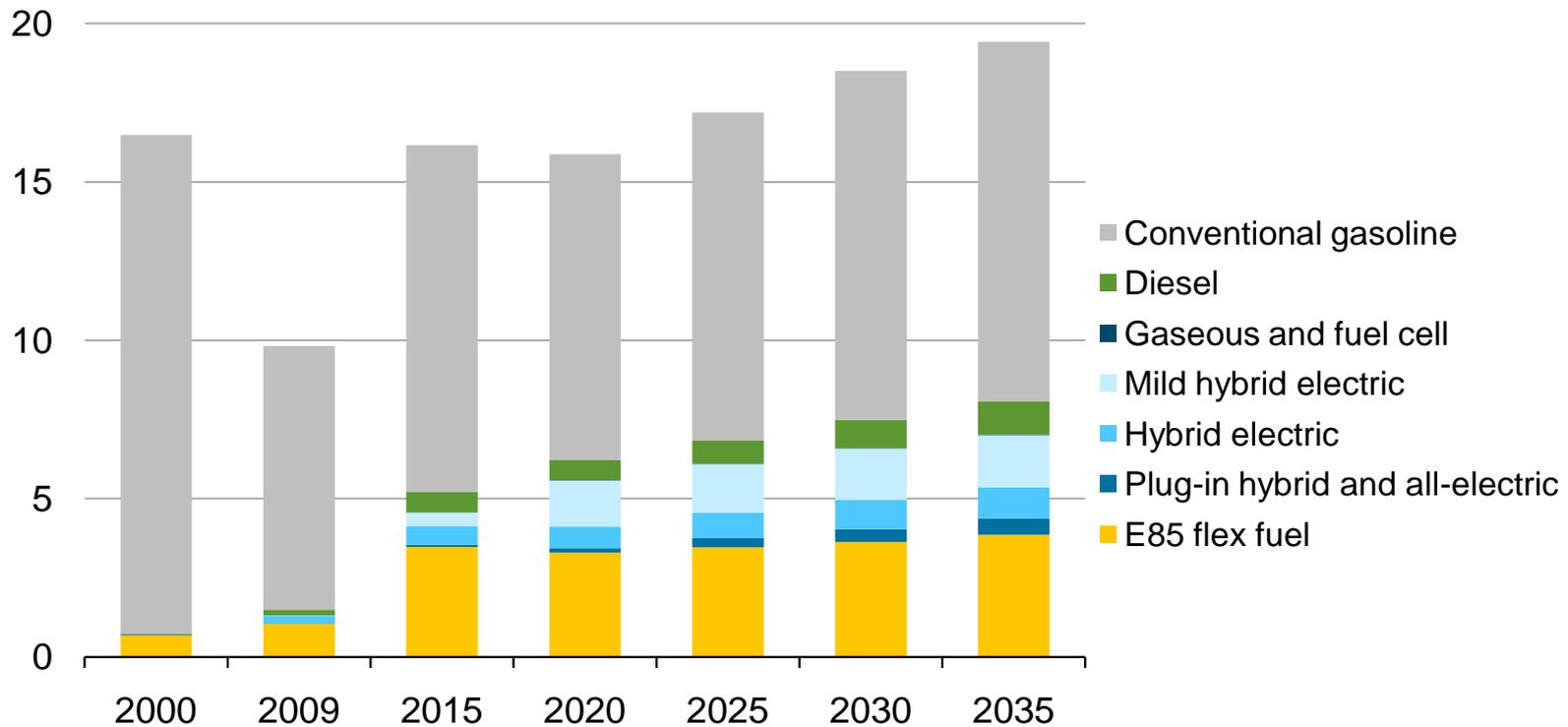
	2009	2035	Growth (2009-2035)
Light duty vehicles			
Fuel consumption (million barrels per day oil equivalent)	8.9	10.2	15%
Number of licensed drivers (millions)	207	265	28%
Miles per licensed driver	13,100	15,300	17%
Efficiency of vehicle stock (mpg)	20.8	27.8	34%*
Heavy duty vehicles			
Fuel consumption (million barrels per day oil equivalent)	2.2	3.2	47%
Manufacturing output (billion 2005 dollars)	4,197	6,761	61%
Number of freight trucks (millions)	8.7	16.6	90%
Miles per vehicle	23,700	20,200	-15%
Efficiency of vehicle stock (mpg)	6.1	6.6	9%**

* Equal to a 25% reduction in fuel use per mile. ** Equal to an 8% reduction in fuel use per mile.

Source: EIA, Annual Energy Outlook 2011

Unconventional vehicles meet over 40% of U.S. light-duty vehicle sales in 2035

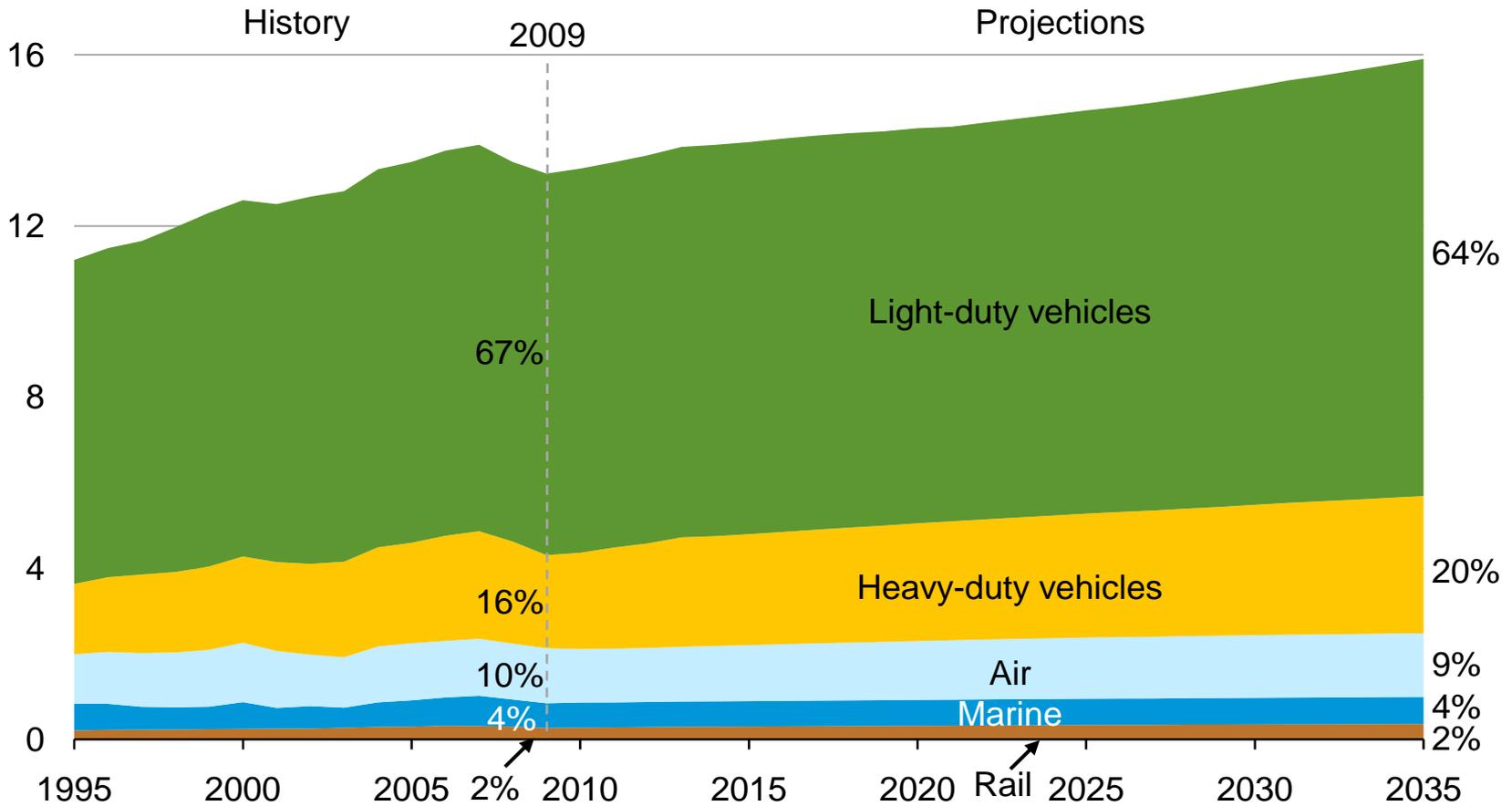
U.S. light car and truck sales
millions



Source: EIA, Annual Energy Outlook 2011

Most transport fuel growth is in light and heavy duty vehicles

U.S. transportation energy consumption
million barrels per day oil equivalent



Source: EIA, Annual Energy Outlook 2011

For more information

U.S. Energy Information Administration home page | www.eia.gov

Short-Term Energy Outlook | www.eia.gov/steo

Annual Energy Outlook | www.eia.gov/aeo

International Energy Outlook | www.eia.gov/ieo

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