

# Petroleum exports: Competing in the global market



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*For*

*EIA Energy Conference*

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*By*

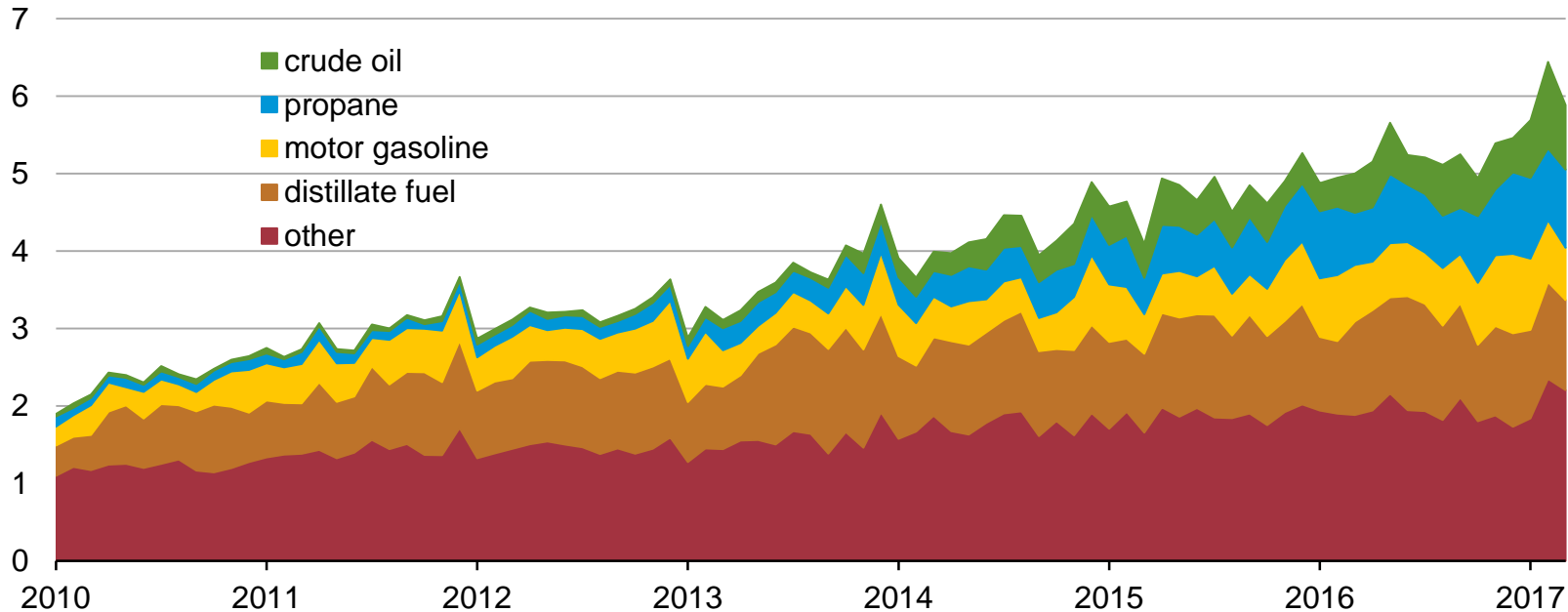
*Hannah Breul, Team Lead, Petroleum Markets Analysis*

# Speakers

- Alan Gelder, VP for Refining, Chemicals and Oil Markets, Wood Mackenzie
- John Auers - Executive Vice President, Turner, Mason & Company
- Sarah Ladislaw, Director and Senior Fellow, Energy and National Security Program, CSIS

# U.S. exports of crude oil and petroleum products rising, but trends vary across products

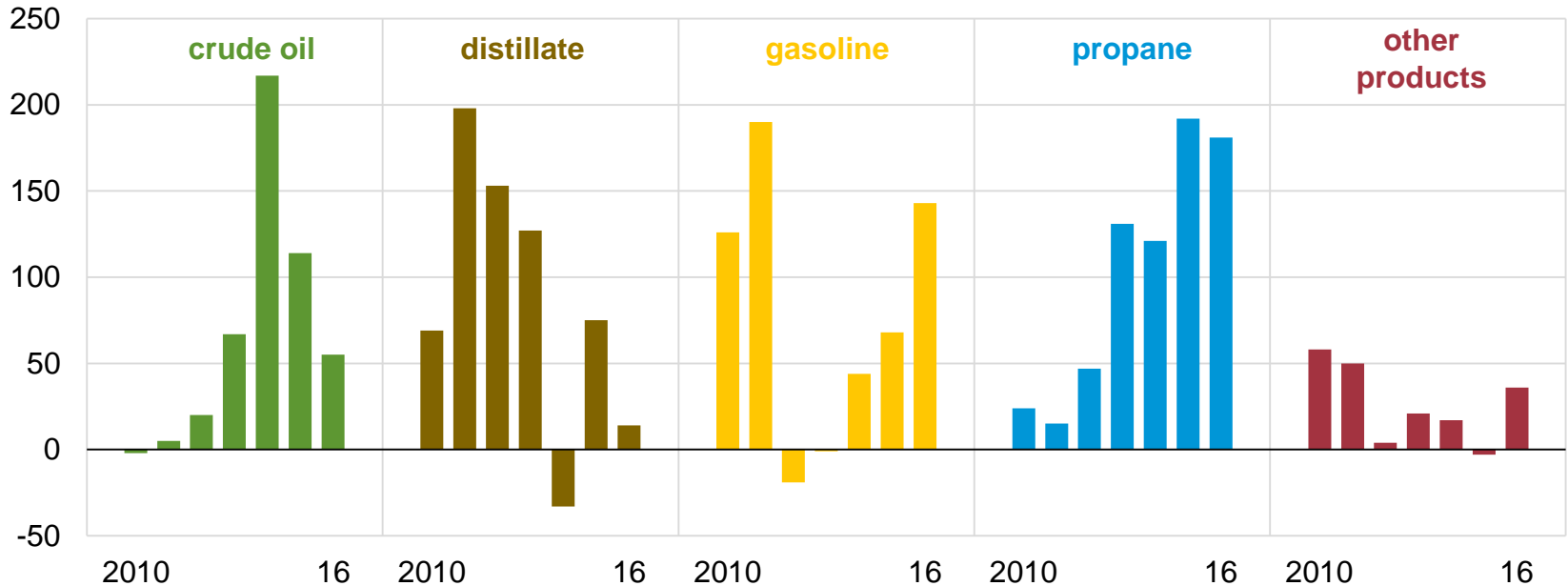
Monthly U.S. petroleum exports  
million barrels per day



Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*

# Recent growth in petroleum product exports driven by gasoline and propane

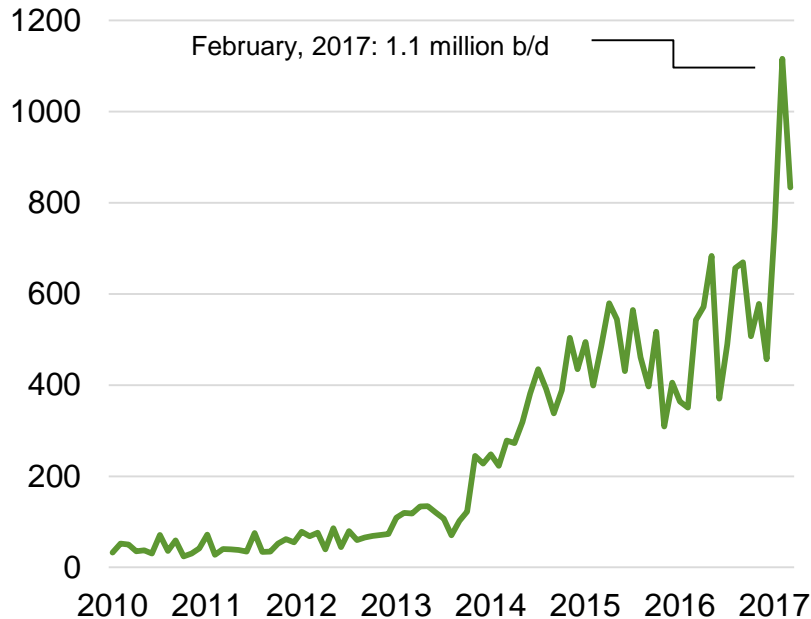
Year-over-year change in exports  
thousand barrels per day



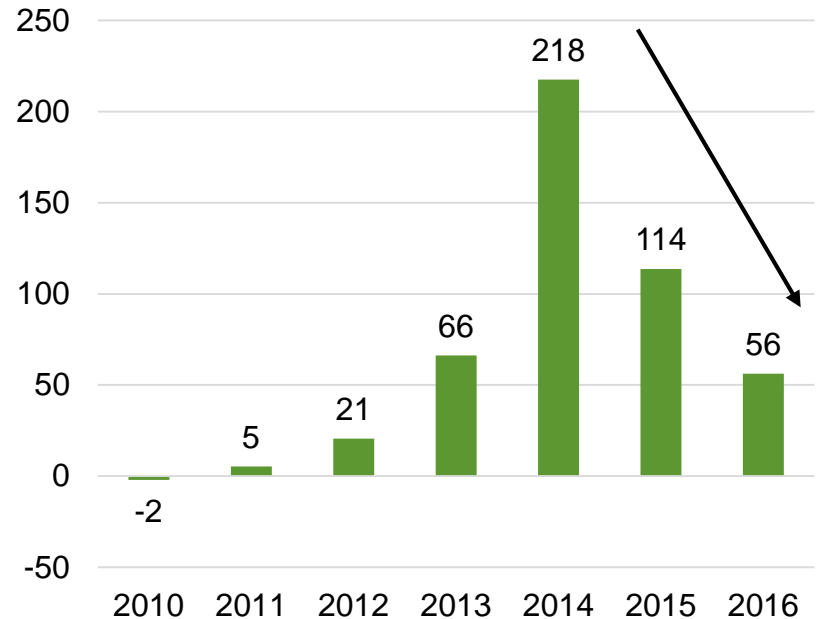
Source: U.S. Energy Information Administration, *Petroleum Supply Annual*, *Petroleum Supply Monthly*.

# U.S. crude oil exports have grown, but the rate of growth is decelerating

Monthly U.S. crude oil exports  
thousand barrels per day



U.S. crude oil exports year-over-year change  
thousand barrels per day

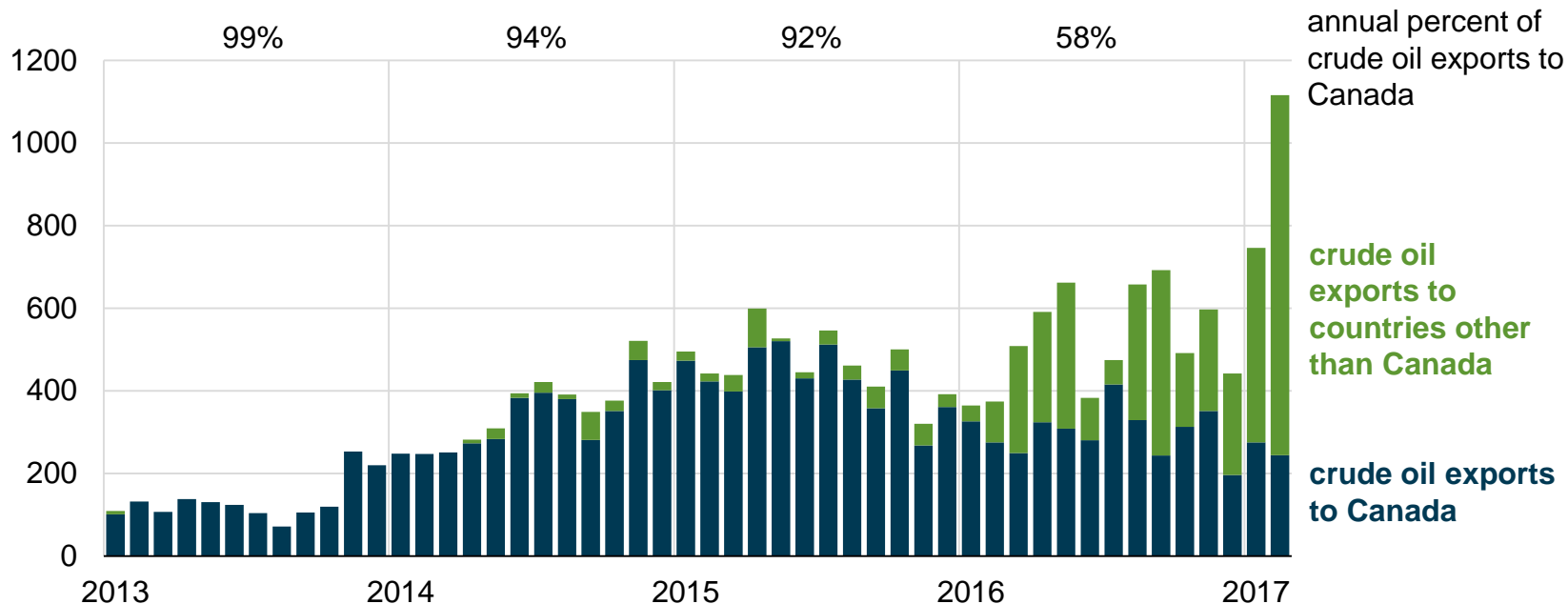


Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

# While most U.S. crude oil exports still go to Canada, volumes to other destinations have increased

Monthly U.S. crude oil exports (January 2013 – February 2017)

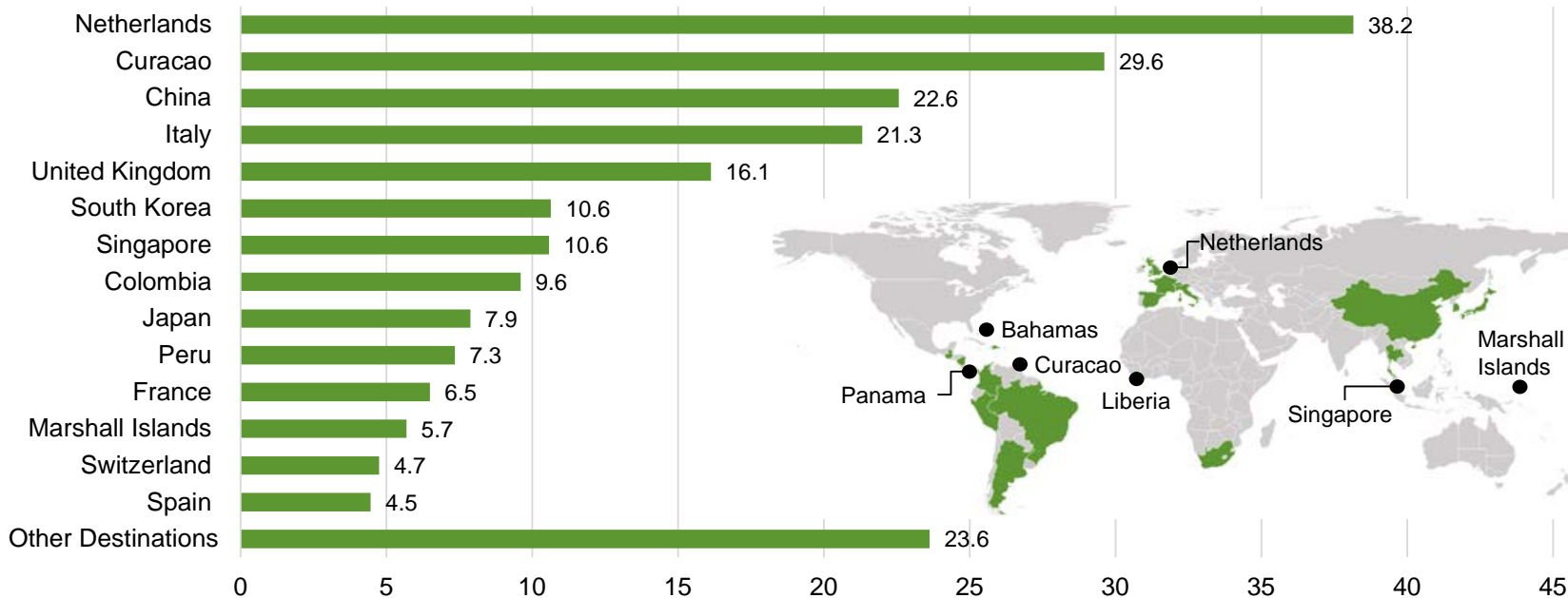
thousand barrels per day



Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

# Aside from Canada, there are no clear preferred markets for U.S. crude exports

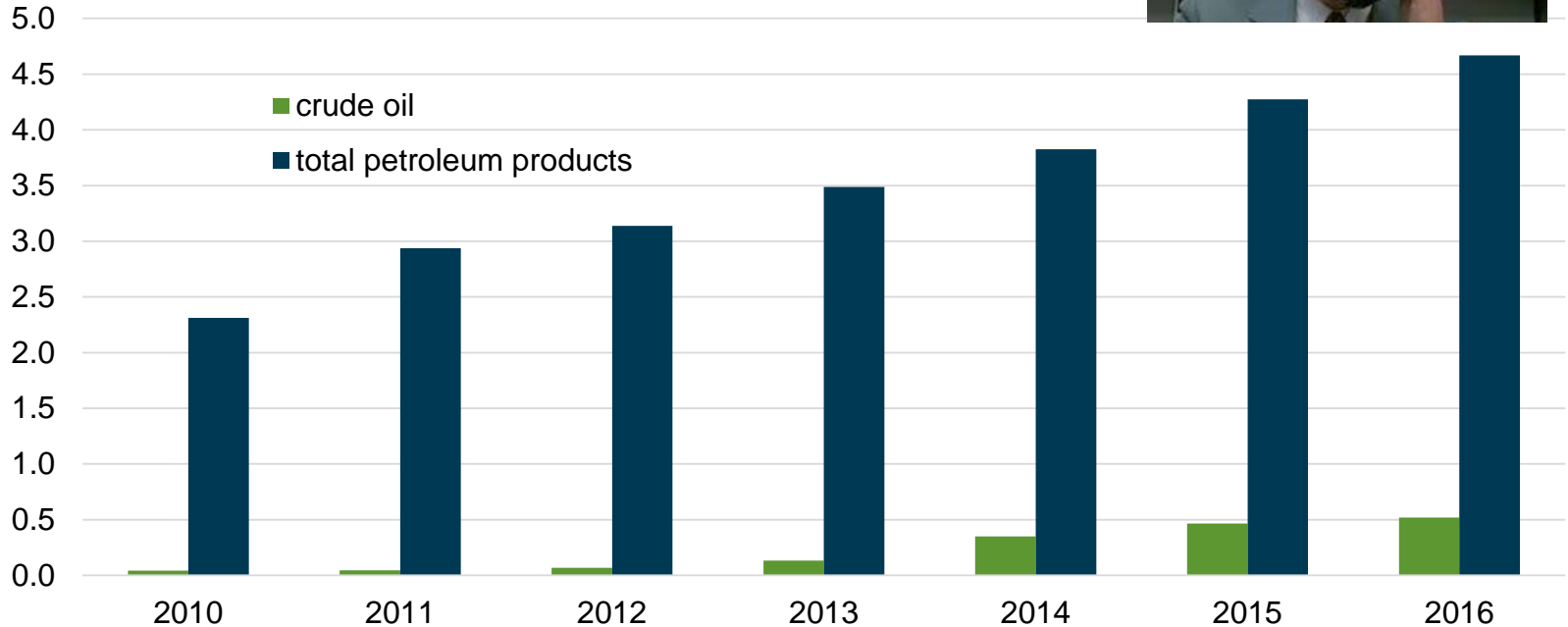
2016 U.S. crude oil exports (excludes Canada)  
thousand barrels per day



Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

# In 2016, the United States exported 9 times more petroleum products than crude oil

U.S. crude oil and petroleum product exports  
million barrels per day



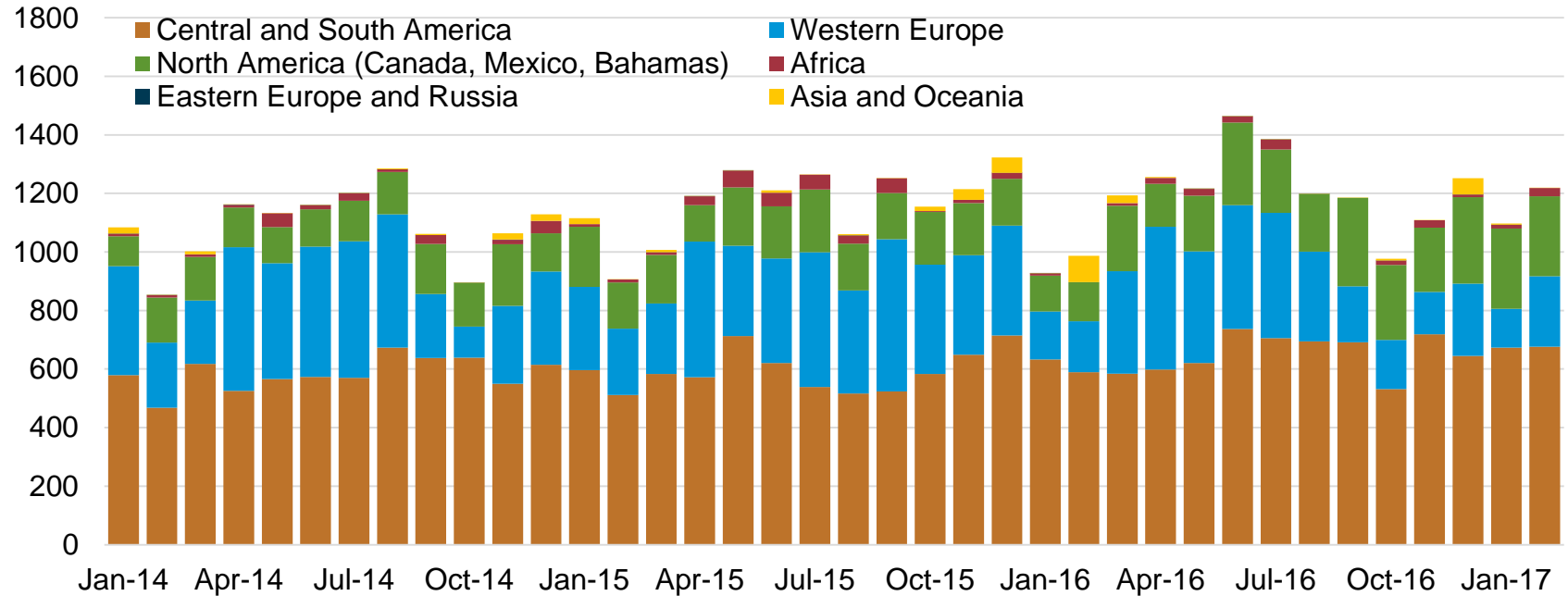
Source: U.S. Energy Information Administration, *Petroleum Supply Annual*, *Petroleum Supply Monthly*.



# 54% of U.S. distillate fuel exports go to Central and South America – Mexico largest single destination

U.S. distillate exports (January 2014 – February 2017)

thousand barrels per day

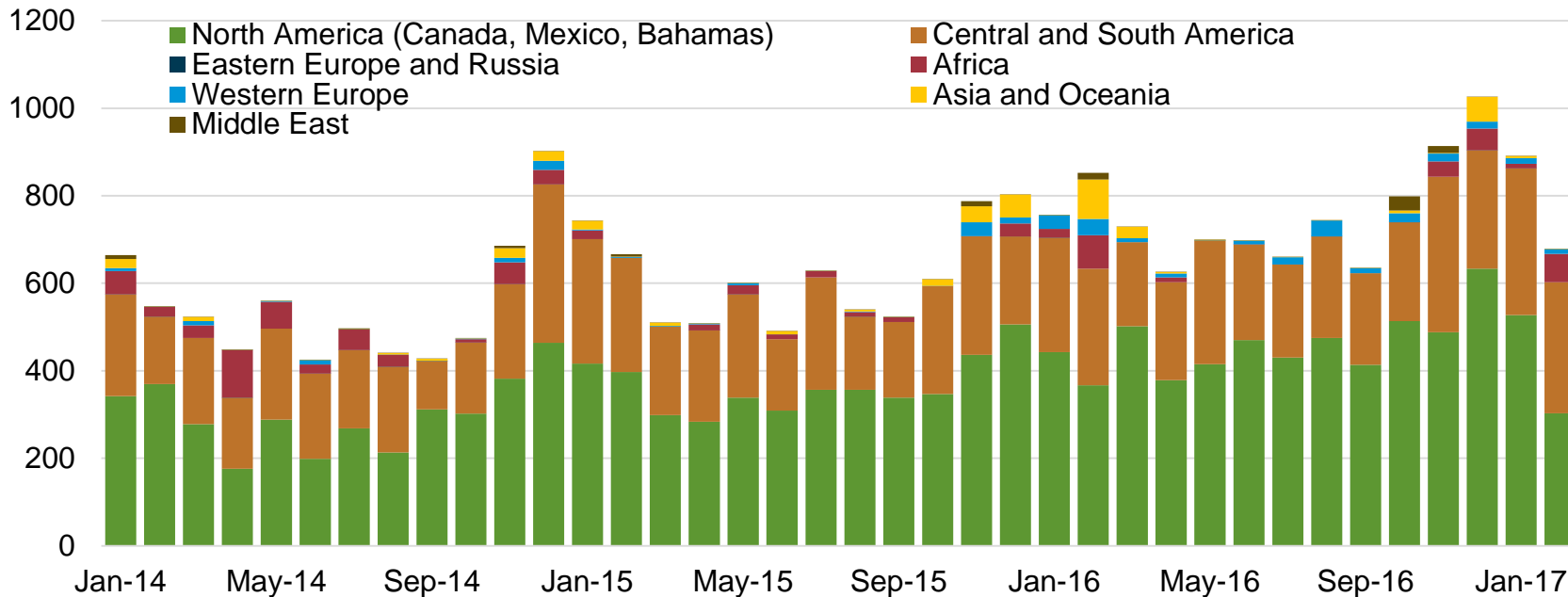


Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

# Most U.S. motor gasoline exports go to Mexico and Central and South America

U.S. motor gasoline exports by destination (January 2014 – February 2017)

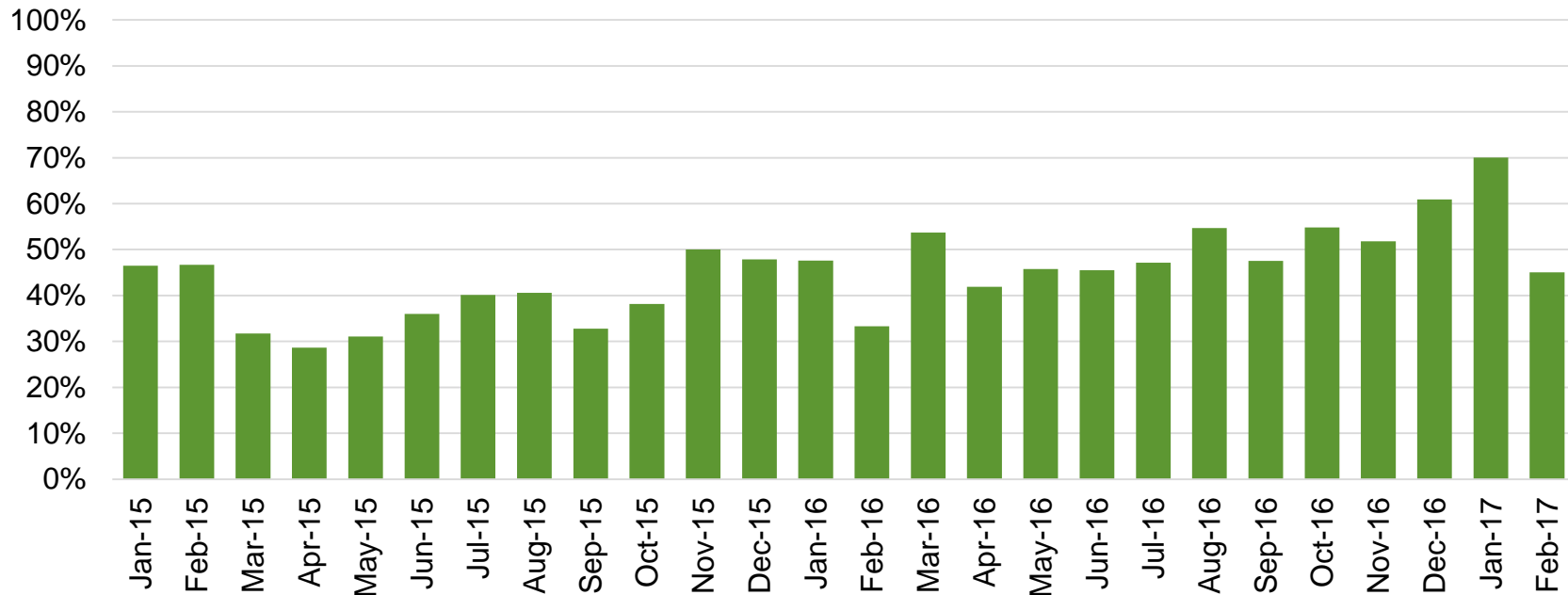
thousand barrels per day



Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

# U.S. motor gasoline exports play major role in Mexican gasoline market

U.S. total motor gasoline exports to Mexico as a share of PEMEX total domestic gasoline sales

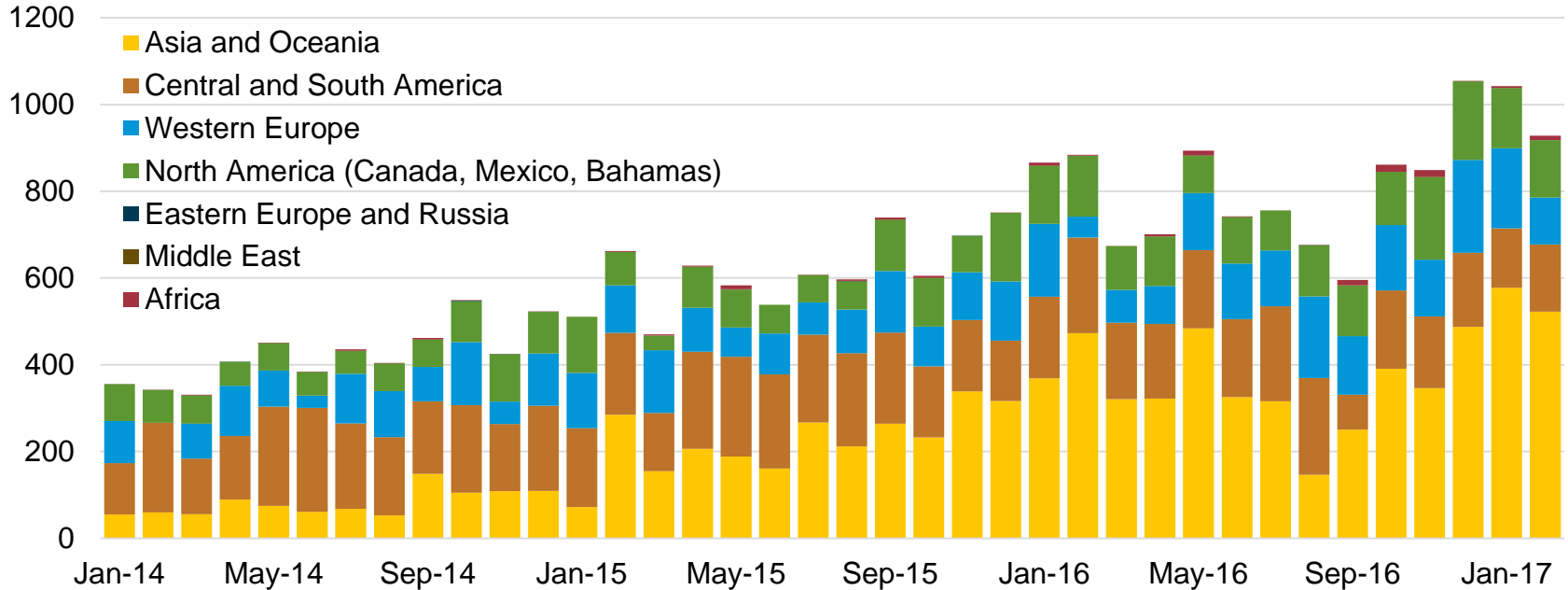


Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*, PEMEX.

# Asia and Oceania is the largest destination for U.S. propane exports

U.S. propane exports by destination (January 2014 – February 2017)

thousand barrels per day



Source: U.S. Energy Information Administration, *Petroleum Supply Monthly*.

## For more information

U.S. Energy Information Administration home page | [www.eia.gov](http://www.eia.gov)

This Week in Petroleum | [www.eia.gov/petroleum/weekly/](http://www.eia.gov/petroleum/weekly/)

Today in Energy | [www.eia.gov/todayinenergy](http://www.eia.gov/todayinenergy)

Annual Energy Outlook | [www.eia.gov/aeo](http://www.eia.gov/aeo)

Short-Term Energy Outlook | [www.eia.gov/steo](http://www.eia.gov/steo)

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State Energy Profiles | [www.eia.gov/state](http://www.eia.gov/state)

Drilling Productivity Report | [www.eia.gov/petroleum/drilling/](http://www.eia.gov/petroleum/drilling/)