

U.S. Petroleum Industry Project Overview



For

Petroleum Marketers Association of America

May 18, 2016 | Washington, DC

By

Adam Sieminski, Administrator

Transportation fuels market studies – key takeaways

- EIA can now provide detailed regional petroleum product analyses for the West Coast, East Coast, and Gulf Coast markets
- EIA's analyses have been expanded to cover jet fuel and retail markets
- EIA can analyze individual refinery outages by refinery unit
- Regions in PADD 1 and PADD 3 exhibit different supply vulnerabilities (PADDs 2 and 4 coming)
 - Port operations & marine deliveries – New England/Florida
 - Pipelines originating in the Gulf Coast – Southeast/Tx Inland/N. La/Ark
 - Refinery operations & logistics – Tx/La Gulf Coast
 - Central Atlantic- concentrated infrastructure in Philadelphia & NY

Each regional market chapter of the report includes a variety of information

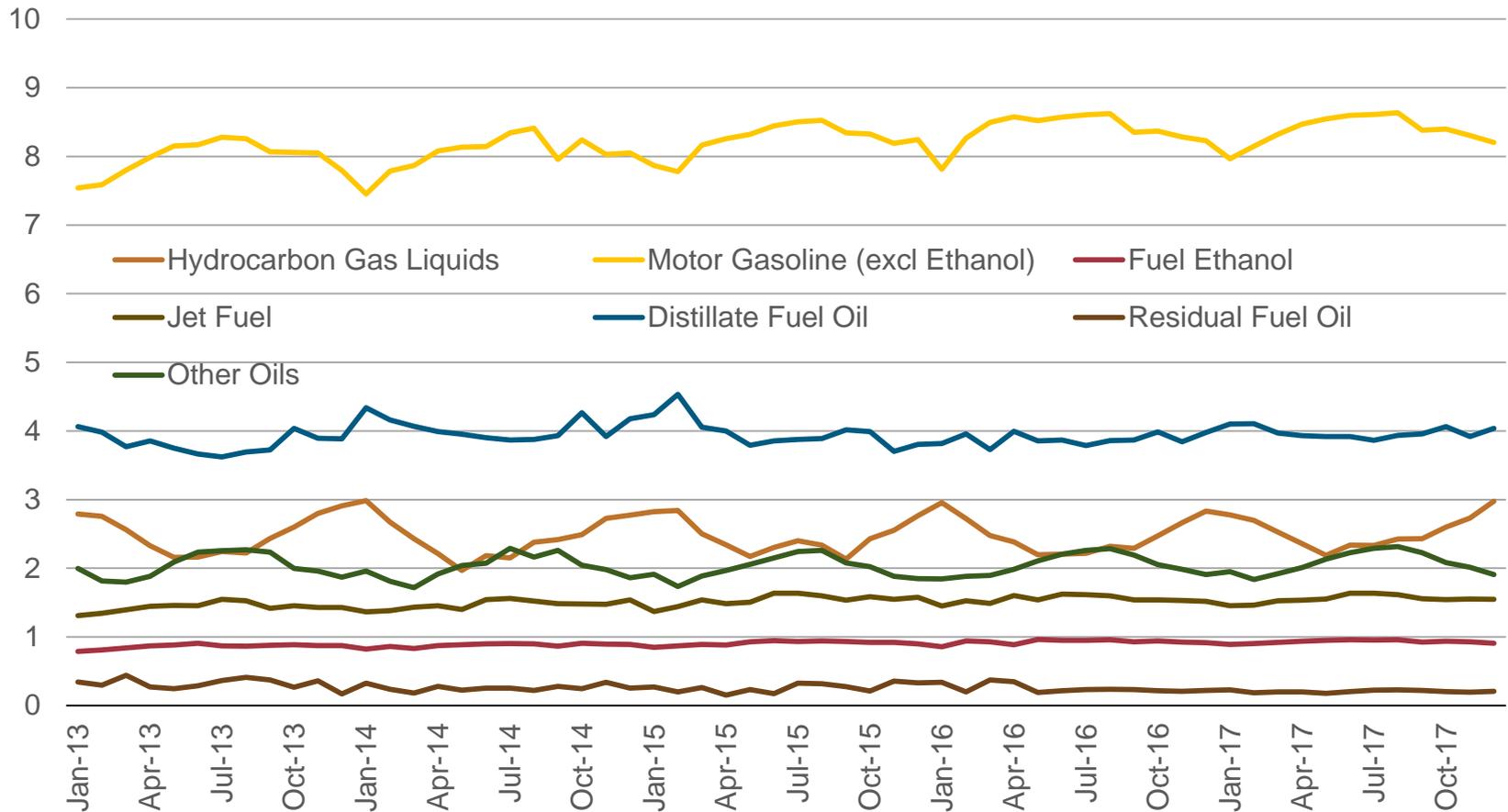
- Supply and demand balances
- Infrastructure logistics
- Demand centers
- Supply vulnerabilities
- Retail markets
- Future anticipated changes

This effort continues an EIA strategy of providing data and analysis on a sub-PADD level

Project	Planned finish
PADD 5 (West Coast) transportation fuels study	September 2015
PADD 1 and 3 (East Coast and Gulf Coast) study	February 2016
PADD 5 (West Coast) crude supply study	May 2016
PADD 2 and 4 (Midwest and Rocky Mountains) study	<i>4th quarter 2016</i>
PRISM petroleum system model	<i>Ongoing</i>
Improved Refinery Outage Report	<i>1st & 3rd quarter reports</i>

U.S. petroleum and other liquids consumption driven by weather, disposable income, etc.

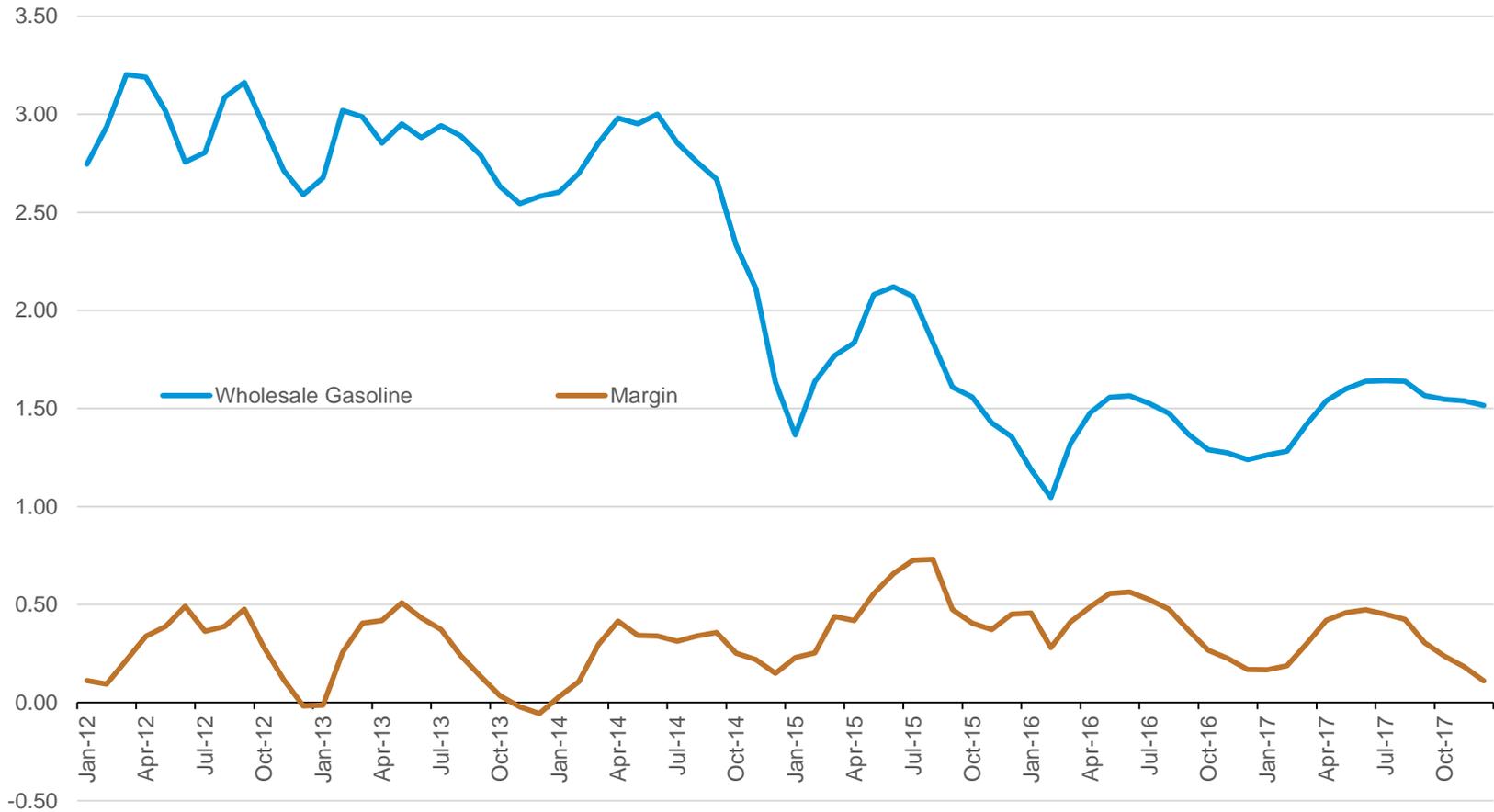
consumption
million barrels per day



Source: EIA, Short-Term Energy Outlook, May 2016

Wholesale gasoline prices and margins

dollars per gallon

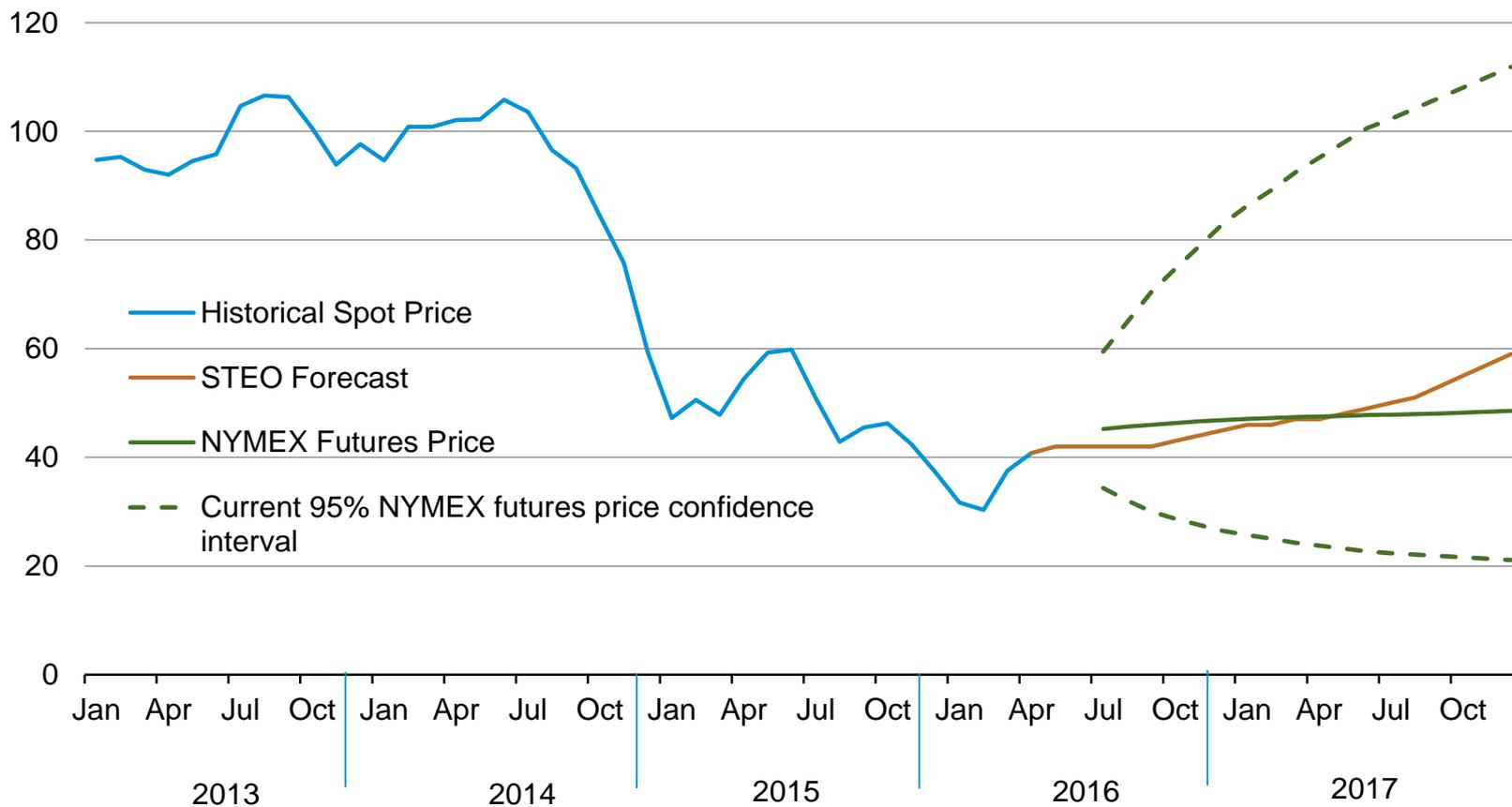


Source: EIA, Short-Term Energy Outlook, May 2016

EIA expects WTI oil prices to remain low compared to recent history, but the market-implied confidence band is very wide

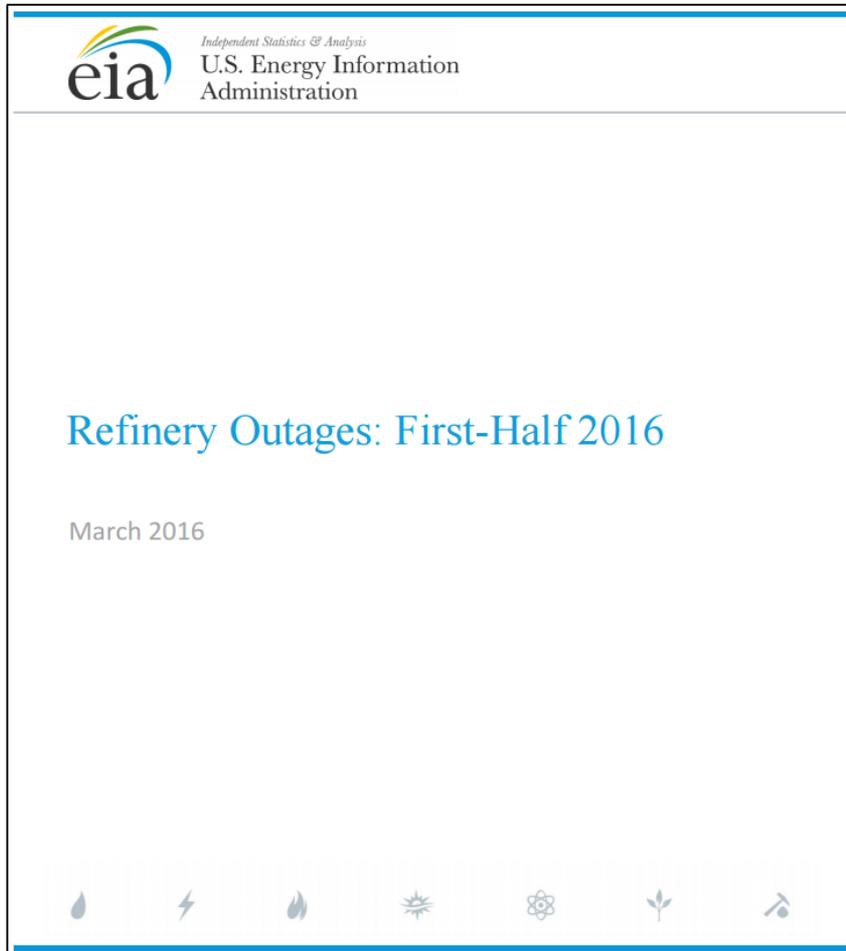
WTI price

dollars per barrel



Source: EIA, Short-Term Energy Outlook, May 2016

Refinery outages report



- Examines planned U.S. refinery outages and the implications for available refinery production capacity, petroleum product markets, and the supply of gasoline, diesel fuel, and jet fuel
- Considers the supply of petroleum products on regional (both PADD and sub-PADD) levels, rather than at a national level

Source: <http://www.eia.gov/petroleum/refinery/outage/>

Energy disruptions map with real-time weather data



- Tracks and reports on selected significant storms that impact or could potentially impact energy infrastructure
- Includes past historical events and real-time storm tracking with energy infrastructure maps

Source: <http://www.eia.gov/special/disruptions/>

Refining capacity report

The screenshot shows the EIA website interface for the 'Refinery Capacity Report'. The page title is 'PETROLEUM & OTHER LIQUIDS' and the specific report is 'Refinery Capacity Report' for 'January 1, 2015'. The page includes a navigation menu with 'OVERVIEW', 'DATA', and 'ANALYSIS & PROJECTIONS'. A search bar is visible at the top right. The main content area contains a description of the data series, which includes fuel, electricity, and steam purchased for consumption at the refinery, as well as refinery receipts of crude oil by method of transportation and current and projected atmospheric crude oil distillation, downstream charge, and production capacities. A 'Related Links' section provides links to 'Genealogy Of Major U.S. Refiners', 'Working Storage Capacity at Operable Refineries', and 'Shell Storage Capacity at Operable Refineries'. A 'Tables' section lists nine data series, each with a PDF icon and a 'Full Report' link. The tables include: 1. Number and Capacity of Operable Petroleum Refineries by PAD District and State as of January 1, 2015; 2. Production Capacity of Operable Petroleum Refineries by PAD District and State as of January 1, 2015; 3. Capacity of Operable Petroleum Refineries by State and Individual Refinery as of January 1, 2015; 4. Production Capacity of Operable Petroleum Refineries by State and Individual Refinery as of January 1, 2015; 5. Refiners' Total Operable Atmospheric Crude Oil Distillation Capacity by Individual Refinery as of January 1, 2015; 6. Operable Crude Oil and Downstream Charge Capacity of Petroleum Refineries, January 1, 1998 to January 1, 2015; 7. Operable Production Capacity of Petroleum Refineries, January 1, 1996 to January 1, 2015; 8. Capacity and Fresh Feed Input to Selected Downstream Units at U.S. Refineries, 2013 - 2015; 9. Refinery Receipts of Crude Oil by Method of Transportation by PAD District, 2014.

- Includes fuel, electricity, and steam purchased for consumption at the refinery; refinery receipts of crude oil by method of transportation; and current and projected atmospheric crude oil distillation, downstream charge, and production capacities
- Accounts for operators of all operating and idle petroleum refineries (including new refineries under construction) and refineries shut down during the previous year, located in the 50 States, the District of Columbia, Puerto Rico, the Virgin Islands, Guam, and other U.S. possessions

Source: <http://www.eia.gov/petroleum/refinerycapacity/>

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

Monthly Energy Review | www.eia.gov/mer

Today in Energy | www.eia.gov/todayinenergy