SD OIL & LP GAS CHRONICLE NEWS

March 2015 Newsletter

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PMAA Files Comments on EPA Proposed Ozone Standard

On March 17th, PMAA filed comments regarding EPA's proposed rule to lower ozone standards from the current 75 ppb to 65 – 70 ppb. The comment period closed yesterday. PMAA is deeply concerned about the harmful impact lower ozone standards could have on both the price of gasoline at the pump and the ready supply of gasoline to meet consumer demands. Ozone standards at the levels considered in EPA's proposal could push much of the country into "nonattainment" that would likely lead to many states mandating the use of reformulated gasoline (RFG) in counties that fail to meet the new standards. The introduction of RFG into many new areas nationwide will result in higher gasoline prices which will erode consumer purchasing power and drive the price of many consumer goods higher – placing a significant drag on the still recovering economy. PMAA argued that the current 75 ppb ozone standard is working, but has yet to be fully implemented. Therefore, EPA should leave the current standard for ozone in place until at least 85 percent of counties currently in nonattainment status can comply. The economic consequences do not justify a lower standard at this time.

Bipartisan legislation has been introduced to address these concerns. Yesterday, **Senator John Thune (R-SD) and Joe Manchin (D-WV) reintroduced bipartisan legislation known as "The Clean Air, Strong Economies Act" (CASE Act) (S. 751)** to block the EPA from revising its ozone standard downward until 85 percent of the current nonattainment counties comply with the current standard. Reps. Pete Olson (R-TX) and Bob Latta (R-OH) also reintroduced companion legislation (H.R. 1388) in the House.

PMAA News
Update from Washington, DC

SENATE COMPLETES BUDGET VOTE-A-RAMA

On March 27th, the Senate passed S.1, the Budget Resolution Act, on a largely party line vote of 52-46. The day long charade resulted in passage of numerous unbinding amendments. Budgets don't become law, but they set the overall funding levels that are used by appropriators. The amendments serve to show what the Senate might be capable of approving this Congress. Most of all the votes serve members in gaining political points.

S. 1 includes an amendment passed by a vote of 59-41, which would require paid sick leave for workers who have earned the time. This amendment to the Budget Act does not have the force of law but is a test of support among the Senate.

Another amendment of significance is a Republican amendment to let states opt out of the EPA's climate rule for power plants. The amendment to place a ban on the withholding of highway funds from states that refuse to submit implementation plans for the EPA's upcoming power plant rules passed 57-43. Still, an amendment "promoting national security, economic growth, and public health by addressing human-induced climate change through increased use of clean energy, energy efficiency, and reductions in carbon pollution" passed 53-47 with seven Republicans supporting the language.

The Senate also passed via voice vote an amendment endorsing a change in the definition of full time employee under the Affordable Care Act. The change is strongly supported by PMAA as it would change the definition from 30 to 40 hours for qualification as a full time employee.

An amendment calling for the permanent repeal of the estate tax was passed via an all Republican vote. An amendment to raise the minimum wage was also defeated.

The House approved its $3.8 trillion fiscal 2016 budget on Wednesday in a 228-199 vote with 17 Republicans voting against it and no Democrats voting in favor of the GOP budget.

Following the Budget Act vote, Senators Rob Portman (R-OH) and Jeanne Shaheen (D-NH) passed the Energy Efficiency Improvement Act, S. 535, a small version of the Energy Savings and Industrial Competitiveness Act, S. 720. S. 535 covers buildings and grid-enabled water heaters and S. 720 also covered industrial efficiency.

SENATE TO BEGIN DRAFTING ENERGY BILL SOON

The Chair and Ranking Member of the Senate Energy and Natural Resources Committee are working to create a new comprehensive energy bill this year. The last comprehensive energy bill to be signed into law was the Energy and Security Independence Act of 2007.

Chairwoman Lisa Murkowski (R-AK) and Ranking Member Maria Cantwell (D-WA) see that the nation is at another critical point in the need for an updated energy policy. Since 2007, the shale oil boom, a shift to more crude transport via train, an aging fleet of nuclear reactors and advancements in renewables, have created an extremely different energy environment. It is unlikely that the Senate energy bill will address the Keystone XL Pipeline, ending the U.S. crude oil export ban and reforming the RFS.

Meanwhile, the House Energy and Commerce Committee has already released an outline for a series of energy bills they plan to release over the next few months. The bills will address modernization of energy infrastructure and PMAA will be working to make sure the provisions are fuel neutral. PMAA submitted comments to the House Energy and Commerce Committee in response to the Committee seeking feedback on the rapidly changing energy market. PMAA focused on the current oil export ban, the outdated Jones Act, ethanol's competiveness with traditional motor fuels and fuel neutral policies. To view the letter, click here.

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HIGHWAY FUNDING SHORT TERM FIX ALMOST CERTAIN

House Ways and Means Committee Chairman Paul Ryan (R-WI) continues to work with House Transportation and Infrastructure Committee Chairman Bill Shuster (R-PA) on another short term extension of the Highway Trust Fund. Congressman Ryan reports that if tax reform is going to be a part of the highway bill, then the committees will need more time than the May 31 expiration of funds will allow.

Senate Finance Committee Chairman Orrin Hatch (R-UT) is assuming there will be a patch and has given his panel until May 31 to identify a long-term funding mechanism.

In years past, Congress has partially funded the Highway Trust Fund (HFT) with transfers from the Leaking Underground Storage Tank (LUST) Trust Fund leaving $447 million in the coffers now. PMAA is concerned that Congress may raid the fund again to pay for a short-term extension. The LUST Fund should be used solely to support UST leak prevention and remediation programs and PMAA plans to make sure our concerns are heard.

SENATE APPROVES WATERS OF THE U.S. AMENDMENT

On March 26, the Senate passed by 59-40 an amendment to the Senate Budget Resolution to require a rewrite of the proposed rule clarifying Clean Water Act jurisdiction over waters. The amendment would direct the agencies to coordinate with the states in rewriting the rule. Although the vote on the Budget Resolution is nonbinding, passage does show support for the change in the EPA and the U.S. Army Corps of Engineers April 2014 proposed rule.

PMAA reported recently that Sen. Joni Ernst (R-IA) invited EPA Administrator Gina McCarthy to Iowa to talk about the proposed Clean Water Act jurisdictional rule and the impacts the regulation would have on her state. The Senator wants the EPA Administrator to see who might be impacted by redefining the rule, in particular, the industries such as biofuel producers who would be damaged. Now Sen. Heidi Heitkamp (D-ND) has also asked the EPA to do the same during a hearing yesterday before the Senate Agriculture Committee.

Last year, PMAA joined with a coalition representing a broad range of businesses, industries, and commercial interests to voice strong opposition to the revised definition of “Waters of the United States” (WOTUS) proposed by EPA and the U.S. Army Corps of Engineers (COE). Many petroleum marketers with bulk storage will be adversely affected by the revised definition. At the most fundamental level, the proposal as written represents an unjustified expansion of Clean Water Act jurisdiction far beyond the limits of federal regulation explicitly established by Congress and affirmed by the courts. The proposal would, for the first time, give federal agencies direct authority over land use decisions that Congress has intentionally preserved to the States. It would intrude so far into traditional State and local land use authority that it is difficult to imagine that Congress intended this outcome.

NPGA News

NATURAL GAS EXPANSION FOCUS OF NPGA'S STATE AFFAIRS PROGRAM

Last year, as the industry analyzed its needs from the winter's supply and infrastructure challenges, NPGA revitalized its state affairs program. The goal of the program is to identify legislative and regulatory challenges in the states and develop strategies with state associations and leadership to obtain favorable outcomes.

To identify the legislative and regulatory challenges -- and also to spot trends - NPGA contracted with CQ/Roll Call to use its online StateTrack system, which monitors government activity across the nation. Currrently, NPGA is watching nearly 2,000 active pieces of legislation, and of those, approximately 300 are specifically addressing the propane industry.

The primary issue NPGA is monitoring is natural gas expansion that threatens the industry. The natural gas industry is pursuing, aggressively, a number of tactics to extend into propane territory, including using ratepayers and tax incentives to finance construction of lines. And in five states, NPGA has identified nearly identical legislation proposing seemingly innocuous government-sponsored studies into the feasibility of extending natural gas lines. When NPGA can identify trends, states can share resources such as talking points or white papers to fight these efforts.

NPGA is watching closely other issue areas including challenges and opportunities for autogas, the development of "carbon tax" programs, and fuel price regulation by government agencies. Industry-specific issues include the creation and/or modification of state PERC programs as well as passing limited liability in Indiana and a container law in Idaho to protect propane marketers.

In future issues of NPGA Reports, we will feature issues and activities highlighting the state affairs program. Does your state have a legislative or regulatory concern that NPGA should highlight, or are there tools you need to fight against legislative or regulatory challenges? Let us know by contacting State Affairs Director Lesley Garland at lgarland@npga.org.

PMAA Selects New President

PMAA's Executive Committee is pleased to announce they have chosen Rob Underwood to serve as the next President of PMAA effective Saturday, May 16, 2015. Underwood has been with PMAA since 2007 as its Director of Government Relation. He has played a key role in developing and implementing PMAA's legislative and regulatory agenda. "I am extremely excited about this opportunity to serve as President and I look forward to working with PMAA's Executive Committee, the Board of Directors and its 48 state and regional associations to move this great federation forward," Underwood said. Current PMAA President Dan Gilligan will be retiring later this year.

"Rob's experience, resourcefulness and enthusiasm have been an asset in advancing our government relations agenda and I am sure he will demonstrate those same qualities serving as President. I look forward to working with Rob over the next several months to ensure a smooth transition," said outgoing PMAA President Dan Gilligan.

"Rob understands the unique challenges petroleum marketers and their state associations face in the years ahead and I have a lot confidence in him." said PMAA Chairman Grady Gaubert. "PMAA's search process was comprehensive and exhaustive over the past four months. We were fortunate to interview so many excellent candidates, all of whom could have served PMAA well. The committee wanted to make sure we picked the best possible executive and I believe Rob has the skill set, knowledge, and attitude to become an excellent President," said Search Committee Chairman Mark McBride.

Rob is a native of Georgia and earned his BA degree in Political Science from the University of Georgia. Prior to joining PMAA in 2007, Rob worked for U.S. Senator Saxby Chambliss (R-GA).

Fuel Tax Rate Increase
April 1, 2015

	Prior to April 1, 2015	Effective April 1, 2015
Gasoline	22¢	28¢
Special Fuel (clear diesel/kerosene)	22¢	28¢
Biodiesel/Biodiesel Blends (1)	22¢	28¢
Ethyl Alcohol/Methyl Alcohol	8¢	14¢
Aviation Gasoline	6¢	6¢ No INCREASE
Jet Fuel	4¢	4¢ No INCREASE
Liquid Petroleum Gas (propane)	20¢	20¢ No INCREASE
Compressed Natural Gas (CNG)	10¢	10¢ No INCREASE
Liquid Natural Gas (LNG)	14¢	14¢ No INCREASE
Tank Inspection Fee (2)	2¢	2¢ No INCREASE

SB 1 for your reference. http://legis.sd.gov/docs/legsession/2015/Bills/SB1ENR.pdf

(1) The tax imposed by § 10-47B-4 on biodiesel or biodiesel blends shall be reduced by two cents per gallon in the quarter after biodiesel production facilities in South Dakota reach a name plate capacity of at least twenty million gallons per year and fully produce at least ten million gallons of biodiesel within one year as determined by the secretary of revenue. The secretary shall file a certification of the determination with the secretary of state and the Legislative Research Council as the means of determining the rate of tax applied by § 10-47B-4. The provisions of this section are repealed in the quarter after thirty-five million gallons of taxed biodiesel and biodiesel blended fuel are sold as determined by the secretary of revenue. The secretary shall file a certification of the determination with the secretary of state and the Legislative Research Council as the means of determining the effective date of the repeal of this section.

(2) **The Tank Inspection Fee did not change.** This fee is assessed on every gallon of fuel sold in the state. This includes gasoline, dyed and undyed diesel, ethyl alcohol, etc.

Dakota Access Pipeline

Midwest Alliance for Infrastructure Now (MAIN) Coalition

In late January 2015, the South Dakota Petroleum and Propane Marketers Association became the first South Dakota association to become members of the Midwest Alliance for Infrastructure Now (MAIN) Coalition.

Since that time, many other associations have joined the group which supports the Dakota Access Pipeline. This pipeline will transport oil from the Bakken in North Dakota to Illinois to refineries.

For more information, go to the following links.

Website: https://mwalliancenow.org/
Facebook: https://www.facebook.com/MWAllianceNow
Twitter: https://twitter.com/Mwalliancenow

The Midwest Alliance for Infrastructure Now (MAIN) is a partnership of entities from the agriculture, business, and labor sectors aimed at supporting the economic development and energy security benefits associated with infrastructure projects in the Midwest. MAIN is a project of the Iowa State Building and Construction Trades Council, with members in Iowa, North Dakota, South Dakota, and Illinois – the states crossed by the proposed Dakota Access Pipeline.

Our members include:

- Iowa State Building and Construction Trades Council
- Iowa Association of Business and Industry
- Iowa Petroleum Marketers Association
- CRST Trucking
- South Dakota Grain & Feed Association
- Pierre Economic Development Group
- South Dakota Petroleum and Propane Marketers Association
- South Dakota Trucking Association
- South Dakota Hotel and Lodging Association
- Laborers District of North Dakota and Minnesota
- Great River Economic Development Foundation
- Midwest LECET (Laborers)

7. PADD 2 Regional outage review

7.1. Summary

Planned maintenance in the Midwest region is expected to be light during the first half of 2015. Winter weather did cause unplanned fluid catalytic cracking unit (FCCU) and atmospheric crude distillation unit (CDU) outages in January, but those outages have been resolved. The unplanned outages did not result in supply disruptions as Midwest inventories of gasoline and distillate were high at the start of the year, near the top of the 5-year range.

Midwest refineries produce most of the gasoline and distillate fuel consumed in the region, particularly during the winter months when gasoline demand is seasonally lower. The Midwest also receives supplies from other regions, primarily from the Gulf Coast. Planned Gulf Coast refinery maintenance is not expected to affect the supply of gasoline and distillate available to the Midwest.

As of February 20, Midwest distillate inventories are 4% above average, sufficient to supply 28 days of average demand based on the last three years. Gasoline inventories are slightly below average and sufficient to provide 22 days of supply. Inventories can act as a source of supplemental supply during outages. The time required for resupply from outside PADD 2, typically from PADD 3, varies considerably in the Midwest because of the size of the region. Resupply can reach Oklahoma, Kansas, and Missouri, the southern part of the Group 3 subregion within 7- 10 days, but can take close to 30 days to reach the northernmost states at the end of the supply line. As a result, unplanned outages in the northernmost states could lead to supply disruptions.

7.2. Refinery capacity overview

PADD 2 includes North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Missouri, Iowa, Minnesota, Wisconsin, Illinois, Indiana, Michigan, Ohio, Kentucky, and Tennessee. PADD 2 has 27 operable refineries, of which 26 are operating. These 26 operating refineries have combined CDU capacity of 3.8 million barrels per day (bbl/d[2]) (21% of U.S. capacity) and total FCCU capacity of 1.2 million bbl/d (22% of U.S. capacity). While PADD 2 refineries supply most of the gasoline and distillate consumed in the region, PADD 2 also receives supplies from PADD 3, especially gasoline during the peak summer driving season.

7.3. CDU planned maintenance

Planned CDU maintenance in PADD 2 is light during the first half of 2015. PADD 2 refineries have planned maintenance from March through May (Table 6). Planned CDU maintenance peaks in April when an average of 144,633 barrels per day (bbl/d), 4% of capacity, is expected to be offline. Maintenance as a share of regional capacity is expected to average only 2% in March and 3% in May.

[2] This report measures refinery capacity in barrels per calendar day. Barrels per calendar day is a measure of the amount of input that a distillation unit can process in a 24-hour period under usual operating conditions. It takes into account both planned and unplanned maintenance. Stream day capacity, another measure of refinery capacity, is the maximum number of barrels of input that a distillation facility can process within a 24-hour period when running at full capacity under optimal crude and product slate conditions with no allowance for downtime. Stream day capacity is typically about 6% higher than calendar day capacity.

Table 6. PADD 2 planned CDU outages

(barrels per day)

Month	2015 planned outages	2014 planned outages	2005-14 average of realized planned outages	2005-14 count of realized planned outages	2005-14 minimum realized planned outages	2005-14 maximum realized planned outages
January	0	0	129,032	2/10	18,065	240,000
February	0	14,071	82,826	9/10	8,571	310,609
March	71,290	193,694	250,025	10/10	107,742	451,161
April	144,633	169,683	221,388	10/10	65,167	595,733
May	100,645	192,258	149,456	10/10	7,258	536,774
June	0	34,667	173,288	5/10	34,667	294,773

Source: U.S. Energy Information Administration, based on IIR data as of January 27, 2015.

Note: *Realized* planned outages are the average of actual outages and exclude months where no outages occurred.

7.4. FCCU planned maintenance

Planned FCCU maintenance is light in PADD 2 during the first half of 2015, with the exception of June. FCCU maintenance is scheduled during March, April, and June (Table 7). Planned FCCU maintenance has occurred almost every year since 2005 during the February-May period. Planned maintenance is less common in June and rare in January.

Excluding the June peak, planned FCCU maintenance levels are particularly low during the first half of 2015. Maintenance in June is expected to average 50,267 bbl/d or 4% of regional capacity, above the 40,967 bbl/d monthly 10-year average but below the 53,000 bbl/d that occurred last year. In March, an average of 19,039 bbl/d of FCCU capacity is scheduled for maintenance, and only 8,323 bbl/d is scheduled to be offline in April, accounting for only 2% and 1% of regional capacity respectively.

Table 7. PADD 2 planned FCCU outages

(barrels per day)

Month	2015 planned outages	2014 planned outages	2005-14 average of realized planned outages	2005-14 count of realized planned outages	2005-14 minimum realized planned outages	2005-14 maximum realized planned outages
January	0	0	6,194	1/10	6,194	6,194
February	0	2,321	25,799	7/10	1,448	61,786
March	19,039	100,565	78,249	9/10	32,000	207,935
April	8,323	157,333	72,098	9/10	17,067	157,333
May	0	164,677	76,286	7/10	839	164,677
June	50,267	53,000	40,967	4/10	26,000	53,000

Source: U.S. Energy Information Administration, based on IIR data as of January 27, 2015.

Note: *Realized* unplanned outages are the average of actual outages and exclude months where no outages occurred.

7.5. Unplanned outages

The large geographic area of PADD 2 is an important factor in understanding the significance to distillate fuel and gasoline supply of both planned and unplanned refinery outages. For example, the closeness of southern PADD 2 to the main U.S. refining center in PADD 3 typically makes it possible for emergency supply to reach the region fairly quickly. An unplanned refinery outage in the northernmost part of PADD 2 is more problematic because it can take several weeks for product from alternate sources of supply to reach the area. In addition, supply disruptions that are concentrated in one part of PADD 2 can have a greater impact than disruptions of similar magnitude that are dispersed across the PADD.

Severe cold weather in January caused unplanned CDU and FCCU outages at several Midwest refineries. The unplanned outages did not result in supply disruptions as Midwest inventories of gasoline and distillate were high at the start of the year, near the top of the five-year range.

Tables 8 and 9 provide detail on historical unplanned outages.

Table 8. PADD 2 unplanned CDU outages

(barrels per day)

Month	2005-14 average of realized unplanned outages	2005-14 count of realized unplanned outages	2005-14 minimum realized unplanned outages	2005-14 maximum realized unplanned outages
January	65,998	7/10	3,387	131,513
February	29,383	8/10	2,857	90,000
March	62,356	8/10	14,735	203,303
April	55,839	8/10	2,833	137,823
May	61,502	5/10	11,194	174,032
June	48,073	8/10	10,000	96,200

Source: U.S. Energy Information Administration, based on IIR data as of January 27, 2015.
Note: *Realized* unplanned outages are the average of actual outages and exclude months where no outages occurred.

Table 9. PADD 2 unplanned FCCU outages

(barrels per day)

Month	2005-14 average of realized unplanned outages	2005-14 count of realized unplanned outages	2005-14 minimum realized unplanned outages	2005-14 maximum realized unplanned outages
January	18,286	7/10	5,419	29,419
February	14,486	8/10	1,714	49,786
March	16,118	7/10	1,774	58,710
April	17,021	9/10	4,767	35,933
May	29,678	7/10	3,032	75,000
June	17,783	8/10	3,333	49,000

Source: U.S. Energy Information Administration, based on IIR data as of January 27, 2015.
Note: *Realized* unplanned outages are the average of actual outages and exclude months where no outages occurred.

Visa Incident Response Webinar April 15th

1:00 - 2:00 pm EST

On Wednesday, April 15 at 10:00am Pacific Time, Visa will host a free webinar discussing a critical component of an organization's data security playbook—the incident response plan. Identifying, containing and remediating any electronic security incident is crucial to coordinating resources, minimizing IT downtime and mitigating active exfiltration to reduce the impact of a data breach. Having a comprehensive incident response plan in place can help an organization be prepared to respond to an attack and further protect payment environments, potentially control costs and reduce damage to its reputation.

This webinar will discuss how to create, develop and institute an effective plan, and will explore common incident response gaps that could significantly affect an organization's ability to recover quickly from a security incident. In addition, one of the leading firms specializing in cyber security, compliance and incident response will be in attendance and presenting its real-world best practices.

This one-hour webinar will be presented in English only and will not be rebroadcast in other languages. Participants must attend via computer. Attendance is limited to 1,000 individuals, and **registration is required**. To register, click here. **Note**: The username and password created at registration will be necessary to access the webinar on the day of the event.

Should you have any additional questions on this webinar or any other petroleum solutions, please contact PMAA's Worldpay Executive Client Manager, Glenda Preen at 972.325.1801.

Biodiesel Infrastructure Reimbursement Grants Available

The South Dakota Soybean Research & Promotion Council (SDSRPC) will consider awarding grants to fuel distributors and diesel retailers for the purpose of investing in equipment used to sell biodiesel blends to bulk users or at retail stations. Equipment may include, but is not limited to, extra tanks for biodiesel, heat for biodiesel tanks or blender pumps. The SDSRPC and MEG Corp will handle all grant inquiries, receive official requests and help evaluate each request for funds to determine which projects will result in higher availability of biodiesel in South Dakota. MEG Corp will provide technical assistance to grant recipients.

For More Information:
Adam Herges
South Dakota Soybean Research & Promotion Council
605-330-9942
aherges@sdsoybean.org

SOUTH DAKOTA SOYBEAN RESEARCH & PROMOTION COUNCIL

MEG CORP

2014/2015 Training Programs

Please email the following address for registration forms for all classes: dawna@sdp2ma-sdacs.com or go online to http://sdp2ma.com and find registration forms in Education and Training.

Certified Employee Training Program

2015 Class Schedule

January 6-7	Basic	Pierre	**Complete**
February 3-5	Delivery	Pierre	**Complete**
March 3-4	Basic	Watertown	**Complete**
March 31- Apr 2	4.1	Mitchell	**Complete**
April 7-9	Delivery	Watertown	
April 28-30	Plant	Aberdeen	
May 5-6	Basic	Sioux Falls	
June 2-4	Delivery	Sioux Falls	
June 9-11	4.2	Mitchell	
June 23-25	Plant	Sioux Falls	
June 30-July 2	Plant	Mitchell	
July 7-8	Basic	Aberdeen	
August 4-6	Delivery	Aberdeen	
September 22-23	Basic	Deadwood	
October 6-8	Delivery	Rapid City	
November 3-4	Basic	Mitchell	
December 1-3	Delivery	Mitchell	

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UST Owner/Operator Training

2015 Class Schedule

March 24	Sioux Falls Ramkota	**Complete**	1- 5 pm
March 25	Amerinn Chamberlain	**Complete**	8 am to 12 noon
March 26	Rapid City Ramkota	**Complete**	8 am to 12 noon
May 5	Mitchell Highland Conference Center		8 am to 12 noon
May 6	Watertown Event Center		8 am to 12 noon
September 9	Aberdeen Ramkota		8 am to 12 noon
September 10	Sioux Falls Ramkota		8 am to 12 noon
November 3	Rapid City Ramkota		8 am to 12 noon
November 4	Pierre Club House Inn & Suites		8 am to 12 noon
November 5	Sioux Falls Ramkota		8 am to 12 noon

All other seminars 8 am to noon (except March 24).

To register: http://denr.sd.gov/des/gw/tanks/TankOperatorTraining.aspx

News from NACS
Washington, DC Update

American Fuel Consumption Lowest in a Generation

Annual household fuel consumption declined by 19% from 2004 peak usage, now at lowest level since mid-1980s.

March 27, 2015
ANN ARBOR, Mich. – Data released this week by the University of Michigan's Transportation Research Institute (UMTRI) found that average fuel consumption for U.S. drivers dropped in 2013 to the lowest level since the organization began measuring in 1984.

Fuel consumption is lower now than it was a generation ago and is some 14 to 19% less than peak levels in 2003-2004, whether analyzed by vehicle, driver, person or household. This finding is similar to the findings in a Fuels Institute report analyzing driver demographics over the past 100 years.

The UMTRI study indicates that in 2013, the amount of fuel consumed per person in the U.S. was about 392 gallons, while households consumed an average of 1,011 gallons — respective declines of 17% and 19% from 2004 peaks. Fuel consumption per vehicle dropped to 524 gallons in 2013 (down 14% from the peak) and per-driver fuel use declined 16% to 583 gallons.

"Despite population growth of 8%, the absolute amount of fuel consumed by light-duty vehicles decreased by 11% during the period 2004 — the year of maximum consumption — through 2013," UMTRI researcher Michael Sivak summarized in a press release.

Similarly, the Fuels Institute report, "Driver Demographics: The American Population's Effect on Vehicle Travel and Fuel Demand," found that transportation demand has stabilized after a century of continuous growth, suggesting that the U.S. driving pool has reached a level of saturation. Historically, the amount of drivers grew rapidly until 1980, but has since plateaued at around two-thirds of the general population.