



U.S. PETROLEUM REFINING

*Assuring the Adequacy and
Affordability of Cleaner Fuels*

A 2000 Report of the National Petroleum Council
An Oil and Natural Gas Advisory Committee to the Secretary of Energy

The report assesses the industry's ability to meet consumer demand for petroleum products, including the continuing viability of the U.S. refining industry. The report analyzes the timing and size of the necessary refining and distribution investments to implement four changes in petroleum product specifications for which regulations have been issued or proposed:

- Reducing the sulfur content of gasoline to 30 ppm average
- Reducing the sulfur content of on-highway diesel to 30 ppm average
- Reducing or eliminating MTBE from gasoline
- Reducing the driveability index of gasoline to 1,200 degrees Fahrenheit.

The report includes examinations of such factors as the state of development of process technology, refinery producibility, product delivery and testing considerations, and facility implementation requirements and capabilities. Appendices to the report include background material on refining and distribution, data on gasoline and diesel sulfur removal technologies, model results and methodologies, and details on construction scheduling and staffing.

Recommendations are made regarding petroleum product specification regulations issued or proposed as of June 2000. The recommendations specifically address very low sulfur gasoline and diesel requirements, driveability index, environmental permitting, and the flexibility of the petroleum distribution system. Other specific recommendations address regulatory basis, timing, and certainty. The executive summary may be viewed at www.npc.org.

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