

RBN ENERGY FUTURE OF FUELS

Long-term Outlook for Crude Oil, Refined Products, Biofuels, and EVs

Understand How Changes Across the Fuels Value Chain Affect Supply, Demand, Trade, and Prices.

Global liquid fuel markets are shaped by interconnected changes in crude supply, refinery capacity, petroleum demand, renewable fuels, vehicle adoption, infrastructure, policy, and pricing. Future of Fuels brings these markets together in one analytical view, helping subscribers understand how developments in one part of the value chain affect regional balances, trade flows, margins, and investment needs.

What We Provide

Published twice a year, Future of Fuels combines analyst interpretation, long-term quantitative forecasts, and supporting Excel workbooks. Each edition provides a full refresh of the market analysis, forecasts, and supporting data and includes:

- ✓ Market analysis across the liquid fuel value chain
- ✓ Supporting data and reference tables
- ✓ Long-term quantitative forecasts
- ✓ Multi-decade market outlook

Built for Decision Makers



Refiners



Producers



Midstreamers



Traders



Financial Institutions



Corporate Strategies

Ready to Learn More? Contact our sales team to request a **demo, sample report,** or inquire about pricing.



Report Features | How You Benefit



Market Interrelationships

Connects crude supply, refinery capacity, liquid- products demand, biofuels, infrastructure, policy, and pricing in one integrated analytical framework.



Long-Term Market Developments

Evaluates structural changes through quantitative forecasts extending over a multi-decade planning horizon.



Changing Market Fundamentals

Assesses developments affecting regional balances, trade flows, infrastructure requirements, margins, and pricing.



Strategic Planning

Provides analytical context for long-term planning, commercial decisions, and investment evaluation.

Report Contents

01.

Introduction

Defines the report scope, methodology, and forecasting approach.

02.

Executive Summary

Summarizes major market developments, key findings, and the outlook.

03.

Recent Developments and Trends

Reviews market, policy, geopolitical, and technology changes influencing the outlook.

04.

Global Refinery Capacity Analysis

Tracks refinery capacity and utilization, additions, closures, conversions, projects, and regional refining capability.

05.

Global & Regional Liquid Products Demand

Forecasts liquids and crude-derived product demand by product, country, and region.

06.

Biofuels and Vehicle Adoption

Evaluates biofuels, renewable diesel, sustainable aviation fuel, and vehicle-adoption trends affecting petroleum demand.

07.

U.S. Refinery Product Supply & Crude Demand

Models refinery operations, crude demand, product balances, and trade requirements.

08.

Upstream & Midstream Analysis

Forecasts crude production and reviews pipeline capacity and market connectivity.

09.

Price Forecast

Forecasts crude and product prices, differentials, margins, freight, feedstocks, and environmental credits.



Each edition of Future of Fuels includes **forecast workbooks with nearly 100 supporting data tables** covering quantitative forecasts, historical reference data, project detail, regional balances, and key market assumptions.

8 Included Forecast Workbooks

- ✓ Petroleum Refinery Capacity Changes from Expected Projects/Shutdowns
- ✓ Global Liquid Products Demand
- ✓ Renewable Diesel & Sustainable Aviation Fuel Capacity Forecast
- ✓ Global Biofuels & Electric Vehicles
- ✓ U.S. Refinery Crude Demand & Product Supply Balance
- ✓ U.S., Canada & Global Crude Production Forecast
- ✓ Key Crude Oil & Products Pipelines
- ✓ Long-Term Price Forecast

Supporting Data Coverage Tables



Petroleum Refinery Capacity Changes from Expected Projects/Shutdowns

- Crude and Product Capacity Changes by Region
- Conversion Unit Capacity Changes
- Total Crude Capacity Changes by Year
- Heavy Crude Capacity Changes by Year
- Expected Projects/Shutdowns Detail – U.S.
- Expected Projects/Shutdowns Detail – Canada & Mexico
- Expected Projects/Shutdowns Detail – Central & South America
- Expected Projects/Shutdowns Detail – Europe (ex. CIS)
- Expected Projects/Shutdowns Detail – CIS
- Expected Projects/Shutdowns Detail – Middle East
- Expected Projects/Shutdowns Detail – Africa
- Expected Projects/Shutdowns Detail – Asia Pacific
- Selected Other Proposed Major Refinery Projects – Watch List
- Crude Capacity Changes by Year – Historical
- Historical Refinery Shutdowns and Capacity Reductions by Facility
- Key Developments Since the Previous Edition



Global Liquid Products Demand

- U.S. Total and by PADD
- Canada
- Mexico
- Brazil
- Other Americas
- Europe (ex. CIS)
- CIS
- Middle East
- Africa
- China
- India
- Japan
- Rest of Asia Pacific
- Total World
- Total World Petroleum (Excluding Biofuels)
- GDP and Population Assumptions





Renewable Diesel & Sustainable Aviation Fuel Capacity Forecast

- Standalone Facilities – U.S.
- Capacity at Year End – U.S.
- Co-Processing Facilities – U.S.
- Announced but Unlikely Projects – U.S.
- Operating and Probable Facilities – Canada
- Capacity at Year End – Canada
- Standalone Facilities – Rest of World
- Co-Processing Facilities – Rest of World
- Key Developments Since the Previous Edition



Long-Term Price Forecast

- Crude Oil Prices
- U.S. Gulf Coast
- U.S. Atlantic Coast
- Group 3
- U.S. Midcontinent
- U.S. West Coast
- Latin America & West Africa
- Northwest Europe
- Western Mediterranean
- Arab Gulf
- Singapore
- Freight Rates
- Renewables & Credits (Ethanol, BBD Feedstocks, RINs, LCFS)
- U.S. Inflation Indexes – Historical and Future Assumptions



Global Biofuels & Electric Vehicles

- U.S. & Global/Regional Biofuels Demand Forecast
- U.S. EV Sales – Share of Annual Sales and Existing Fleet
- Global EV Sales by Region – History and Forecast
- Global BEV Sales by Region – History and Forecast
- Global PHEV Sales by Region – History and Forecast
- U.S. and Global EV Impact on Petroleum Demand
- U.S. BD+RD+SAF Product Balance



Key Crude Oil & Products Pipelines

- Pipelines to Cushing
- Pipelines from Cushing and Patoka
- Permian Crude Oil Pipelines
- Bakken Crude Oil Takeaway Capacity
- Western Canadian Crude Oil Takeaway Pipelines
- U.S. Product Pipeline Expected Expansions and Reversals
- Key Developments Since the Previous Edition



U.S. Refinery Crude Demand & Product Supply Balance

- PADD 1–5
- U.S. Total
- PADD Level Gasoline Balance
- PADD Level Jet/Kero Balance
- PADD Level Diesel Balance
- PADD Level Combined Balance
- U.S. Net Balance for Gasoline, Jet, and Diesel – Imports & Exports



U.S., Canada & Global Crude Production Forecast

- U.S. Production – Historical and Forecast
- U.S. Supply and Disposition
- Canada Production – Historical and Forecast
- Western Canada Supply (Including Diluent) – Historical and Forecast
- Global Crude Production – Historical and Forecast

