



# Stranded: West Coast Fuel Supply & Strategic Vulnerability

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# West Coast fuel supply is becoming more fragile at a critical moment



Image Source: LA Times

# California refinery closures are reducing gasoline, jet fuel, and diesel production

## Los Angeles Times

Phillips 66 is closing Wilmington-area refineries after more than a century, marking the end of an era

## San Jose Mercury News

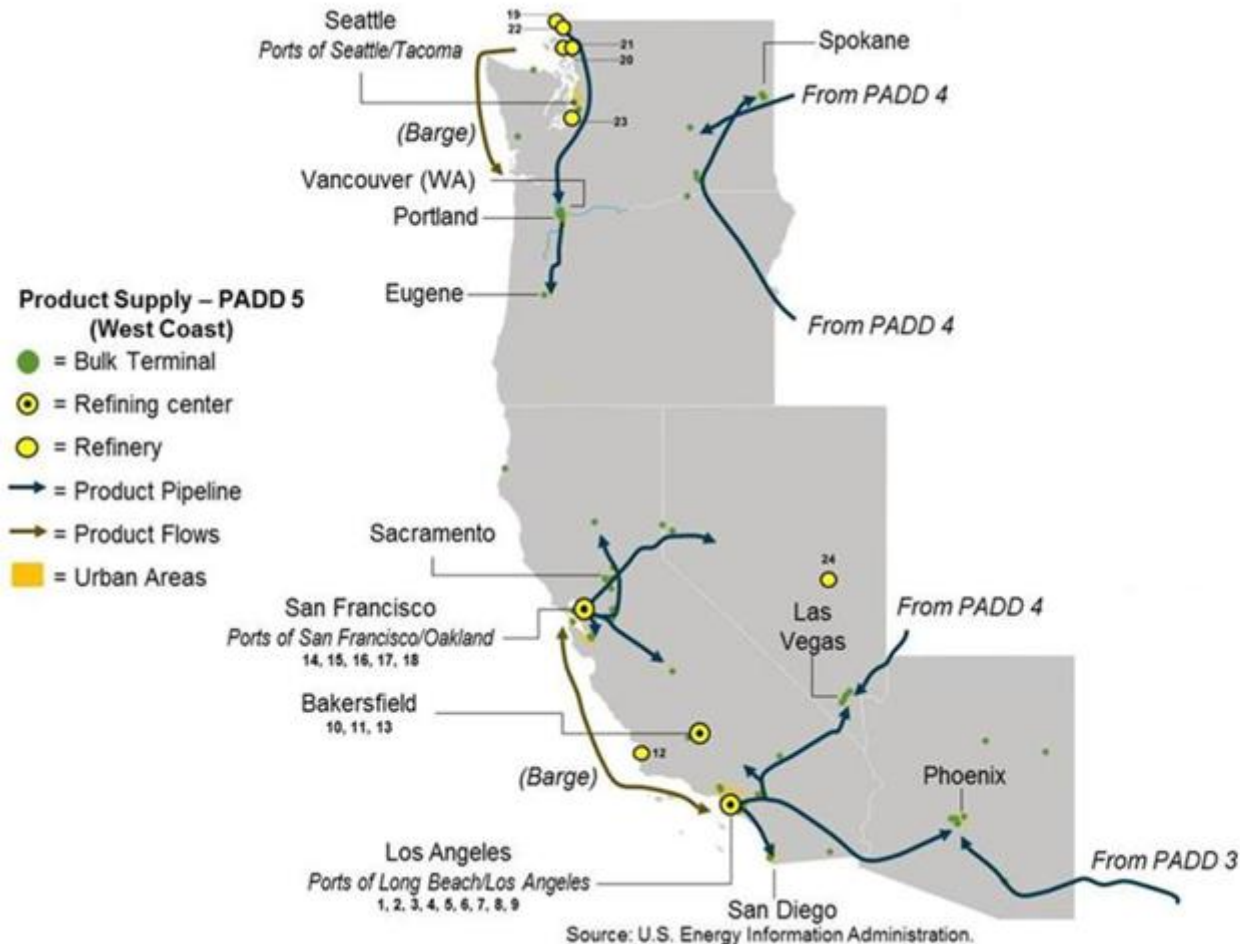
**Valero confirms Benicia refinery will close, leaving city's future uncertain**

Gov. Gavin Newsom had tried to find a buyer for the refinery. Impacts on gasoline prices could be blunted by imports.

## San Francisco Chronicle

**California could lose 20% of its refining capacity in a single year. Drivers will feel it**

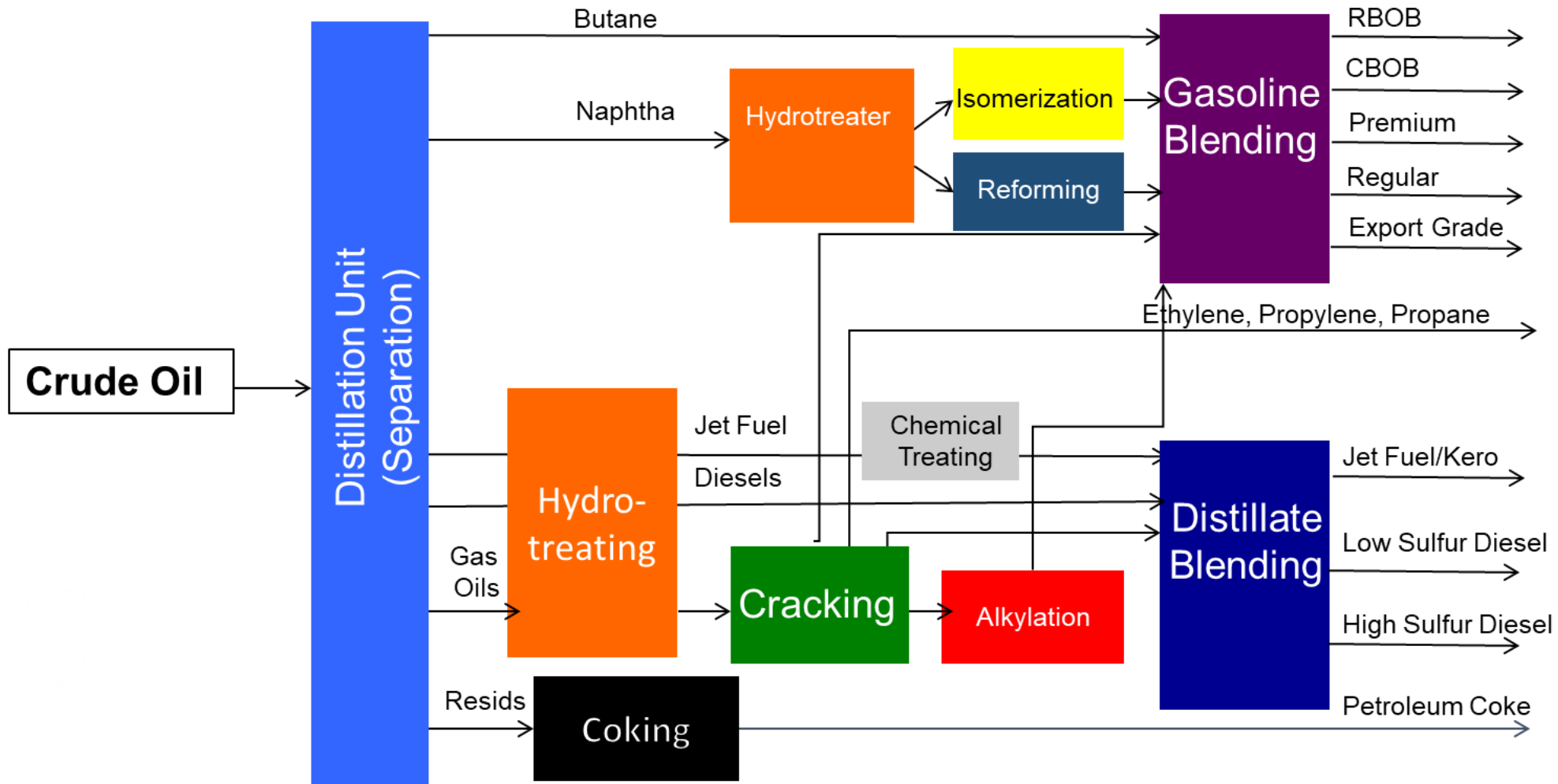
# The West Coast fuel system is like an island and cannot be easily resupplied



**No crude oil pipelines from the East**



# Crude oil flows determine everything downstream



**Crude supply → Refinery throughput → Product availability**

# The West Coast already depends on imported crude, gasoline, and jet fuel

## Crude Oil



25% from Middle East

## Jet Fuel



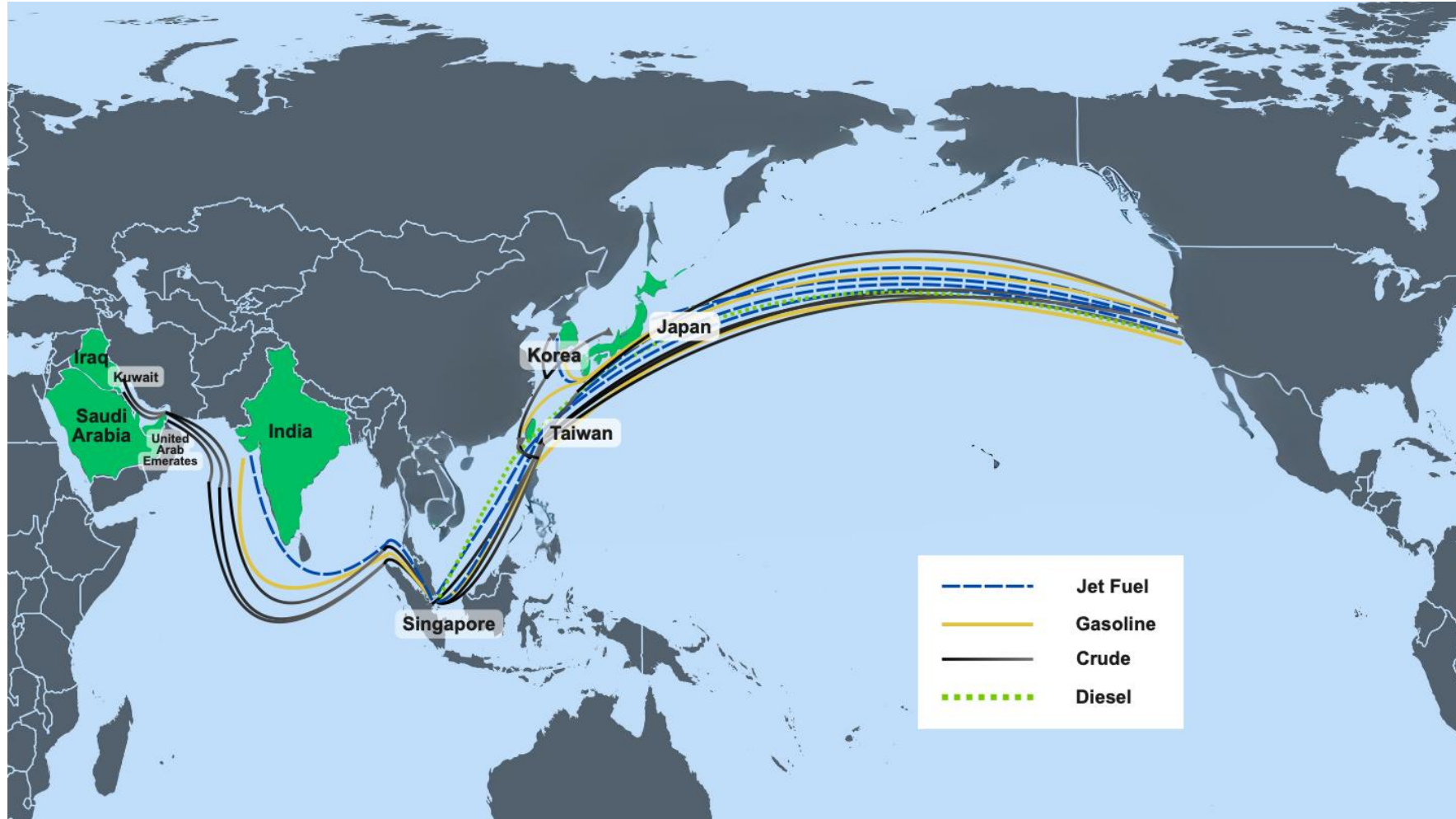
16%, mostly Korea

## Gasoline

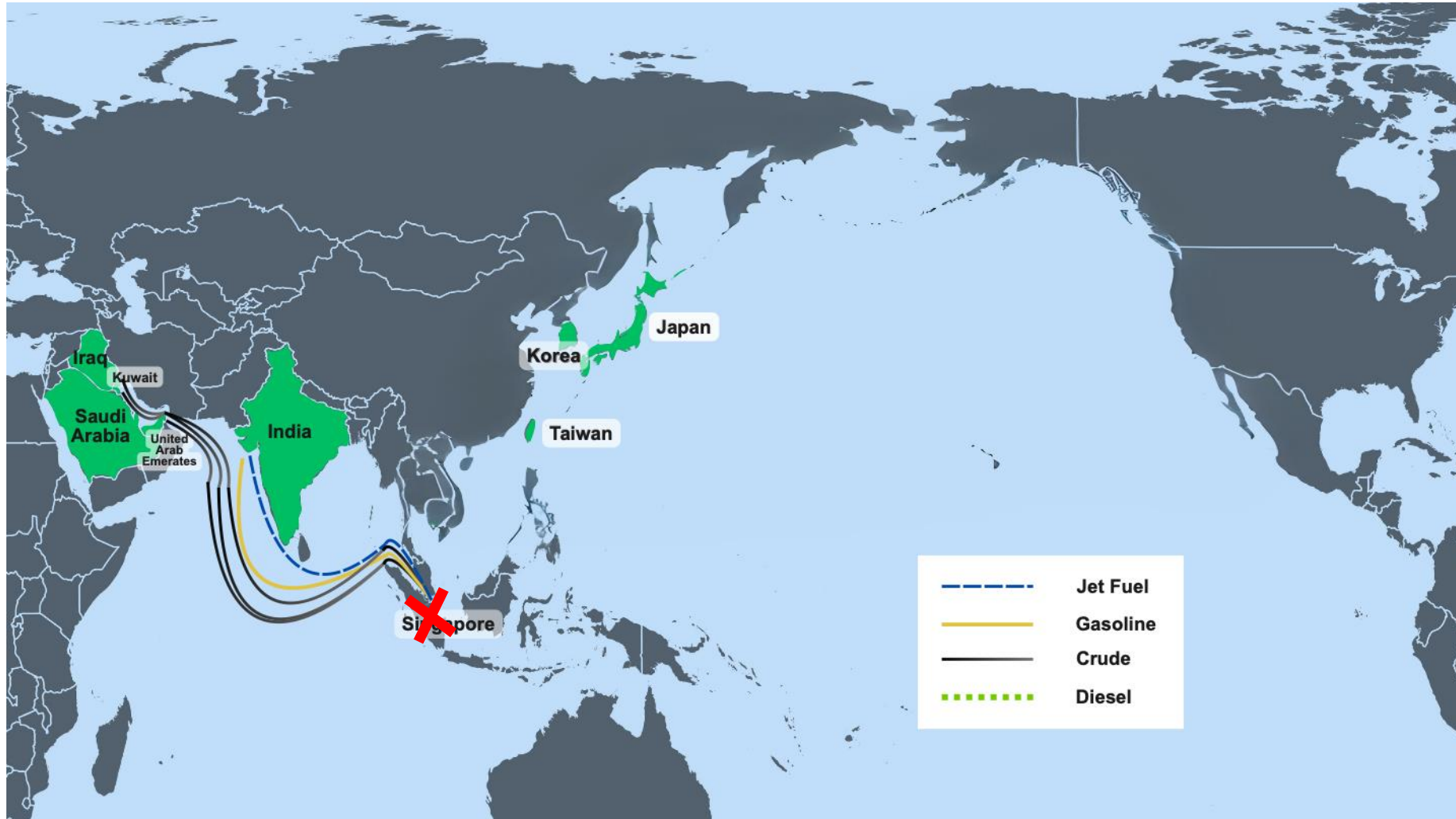


8% Korea, India, Japan,  
Taiwan

# Indo-Pacific refineries and shipping lanes are part of the West Coast supply chain



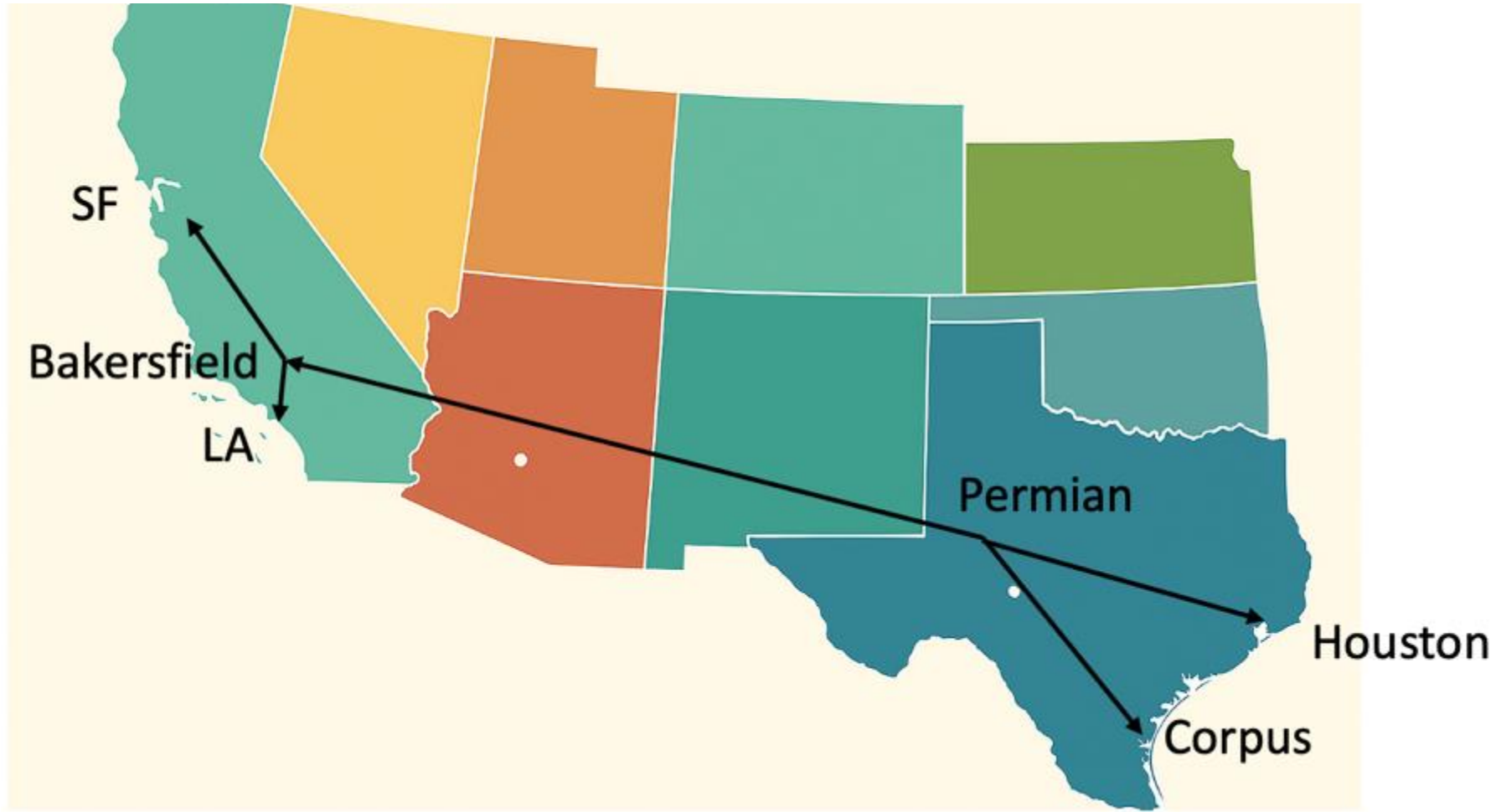
# Disruption upstream means no crude in and no fuel out



# Fuel resilience on the West Coast is a strategic planning issue for the Navy



# A million-barrel-per-day pipeline from the Permian Basin to Bakersfield will solve many fuel supply problems



**The USGC exported nearly 4 million barrels per day in 2024.**

# Bottom Line: West Coast fuel supply is a readiness issue for Indo-Pacific operations

1. Refinery closures permanently reduce local supply
2. West Coast is isolated with limited surge options
3. Crude availability drives refinery and fuel output
4. Supply chains extend deep into the Indo-Pacific
5. Fuel resilience underpins operational readiness
6. There are few short-term solutions



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Thank you.  
Questions?