



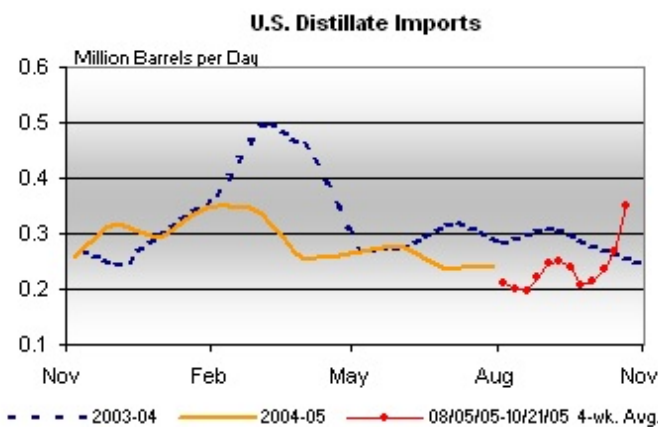
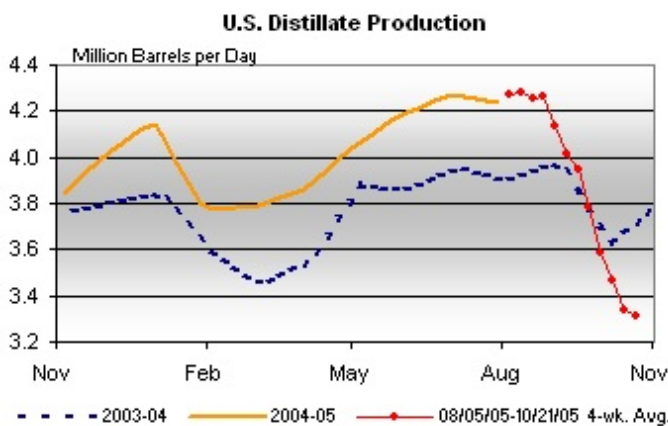
## The leaves and data are changing . . . .

Posted by [Heading Out](#) on October 29, 2005 - 6:30pm

Topic: [Supply/Production](#)

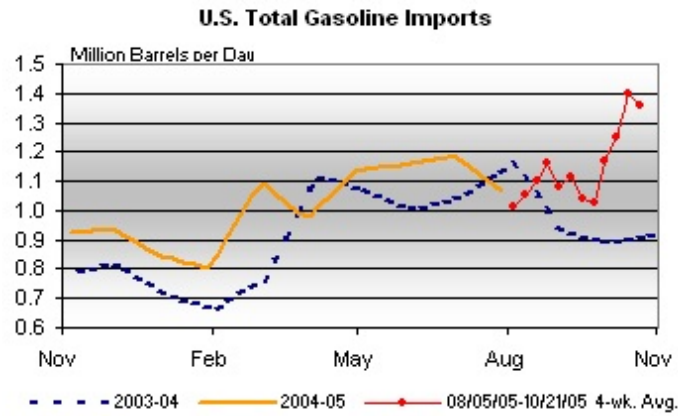
Tags: [distillate](#), [gasoline](#), [imports](#), [peak oil](#), [production](#) [[list all tags](#)]

The next few weeks will begin to spell out the situation in regard to the production of gas and distillate fuels as we prepare for the winter. Looking at distillate first.



It begins to appear that the refineries are switching around and that the [EIA](#) are now showing not only a swing upward in production but an increase in imports as well - perhaps not before time. But then all the folk who will need fuel in the North East have already stocked up ! Right ?

On the other hand, with gasoline imports, it looks as though we have come to the end of the lollipop. While the curve so far from the [EIA](#) shows only a slight kick over, but, remember that these are four week averages.



When one goes to the actual numbers the drop was from 1.54 mbd to 1.027 mbd. This could signify that we are at the end of the loan volume, which, since the refineries aren't up to full production yet, is a concern. Certainly there are enough stocks at present, and with the inability to refine beyond a certain point there is more than enough crude to meet the refinery demand, if not the demand beyond it.

This, I suspect, may be where the juggling begins.



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