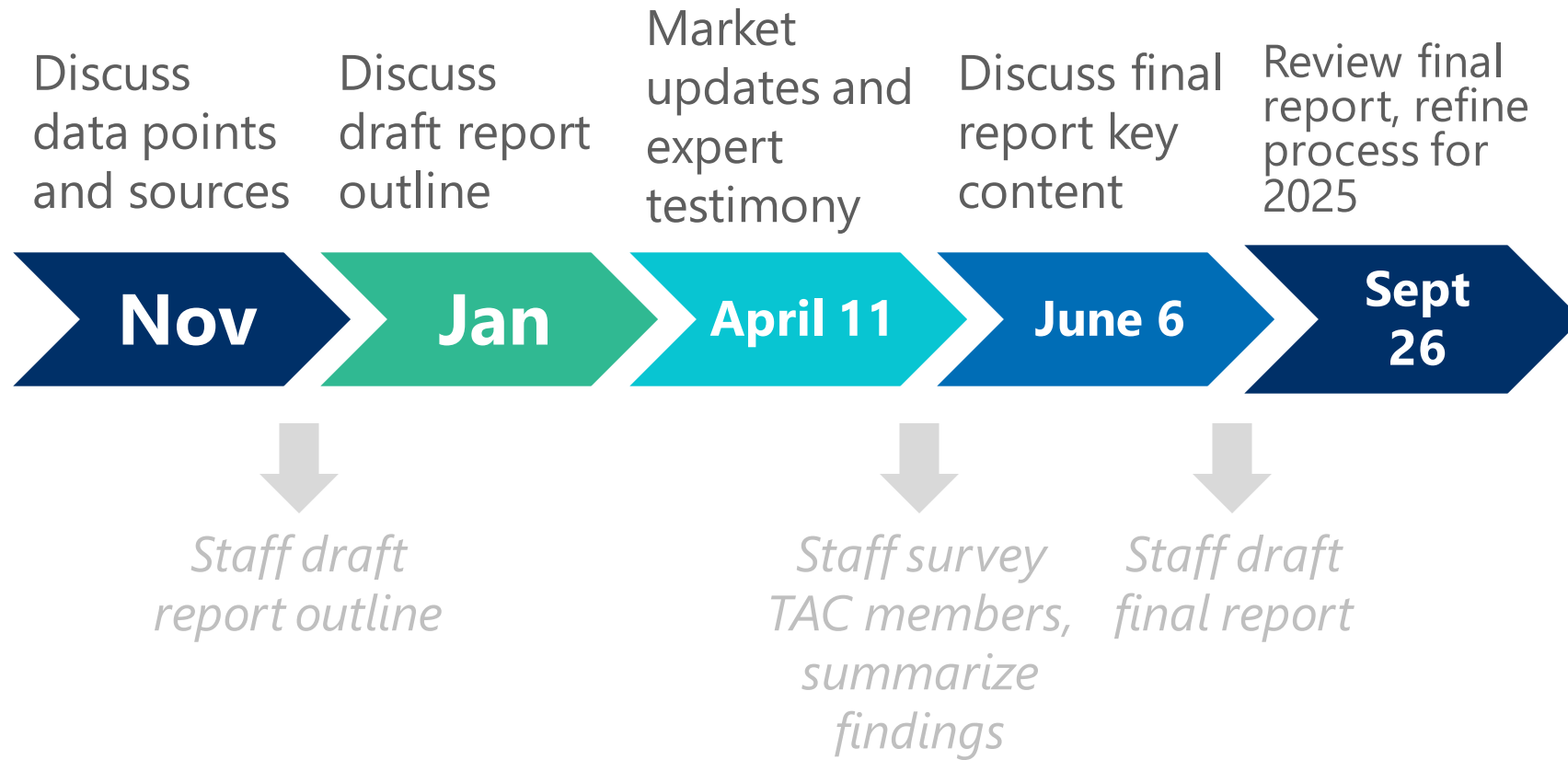


2023-2024 Work Schedule



Report Outline Discussion Topic #1 – Acknowledgements, Introduction, Recommendations

Acknowledgements

Placeholder:
TAC members will need to determine who they want to acknowledge

Introduction

- Background and purpose of report
- List of TAC members
- Meeting schedule

Recommendation

Recommendation to Bureau Director: Should the next scheduled phase-in of the RFS policy proceed as planned?

Justification/key reasons for recommendation citing relevant data points; List of TAC members supporting the recommendation

Dissent: Statement of disagreement with the recommendation and supporting data; List of TAC members supporting the dissent

Report Outline Discussion Topic #2 - Price

Quantitative

Data	Source
Price per gallon at current blend	Subscription service – narrow down choices
Price per gallon of R99 or B99	Subscription service – narrow down choices
Price information based on CI Value	Subscription service – narrow down choices
Rack price	Above or below the rack? Source?
Historical data	What is a useful date range?
Incremental cost of new compliant fuel (including ≤ 40 CI) over current diesel blend	A formula would be created based on the data sources shown above

Qualitative

Summary of important factors likely to affect the broader standard diesel market, as these could affect the incremental cost of bio/renewable over standard diesel. Example, EIA has forecast lower diesel prices for 2024-25 due to supply side factors. This might suggest an increase in the incremental cost of renewable, all else equal.

Current findings on cold weather performance including incremental cost of isomerization for renewable diesel for high blend % cold weather performance.

Report Outline Discussion Topic #3 – Supply and Demand

Quantitative

Data	Source
Reported volume of biodiesel and renewable diesel fuels imported to Oregon: Most recent quarter and trend By volume and % of all diesel fuels	OR DEQ CFP quarterly data
Number and names of fuel importers for biodiesel and renewable diesel	OR DEQ CFP quarterly data
Weighted average CI value of biodiesel and renewable diesel fuels imported to Oregon, most recent and trend	OR DEQ CFP quarterly data
Forecasted availability of alternative diesel fuels to the Oregon market (“fair share” basis)	OR Dept of Admin Services, Office of Economic Analysis, annual analysis forecasted two years out (published in October) WA CFP, Dept of Ecology annual forecast EIA Data - Gasoline and Diesel Fuel Update - U.S. Energy Information Administration (EIA) (supply, price)

Report Outline Discussion Topic #3 – Supply and Demand

Quantitative

Data	Source
Estimated volume of diesel fuels (all types) sold in Portland, most recent and trend	A number of TAC members disagree on using the following as a data source because it has the potential to be misleading. The current estimate uses a downscaled number (105 gallons sold/year), which is based on State population from OR DEQ CFP quarterly data.
	Comments include: S&P Global World View subscription (formerly Polk) has vehicle registration data that could determine vehicle ownership by type / drivetrain down to zip code level - this might be a more useful lens.
	There is likely higher diesel demand in lower populated areas – where there is more trucking, farming, logging, etc.

Clean fuels programs outside Oregon, with alternative diesel phase-in dates before 2026, 2027-2030. Using data from:

- WA (CFP and cap and invest)
- CA (LCFS and cap and trade),
- BC (LCFS)
- Other US
- International, including their requirements and phase-in schedule

Report Outline Discussion Topic #4 – Other

Qualitative

RETAIL

Qualitative analysis of potential constraints of retailers - SMEs that can speak to retail site density and infrastructure challenges for retail diesel within the city.

TERMINALS

Qualitative analysis of terminal investments - Is there sufficient demand in the city for all retail sites and terminals to upgrade to 50% / 99% capability or could you see supply chain consolidation?