

U.S. distillate fuel oil consumption

Selected indicators

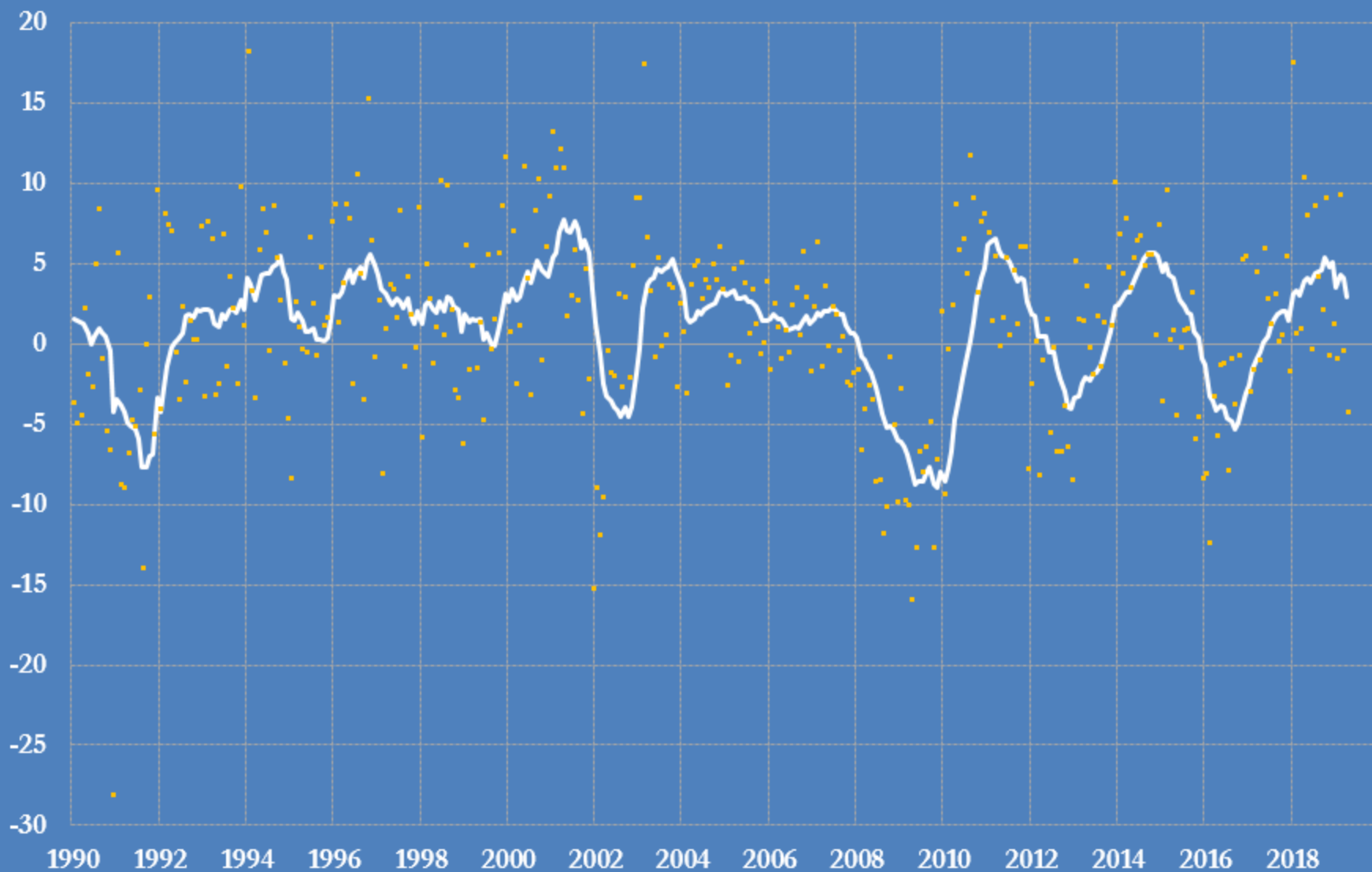
JOHN KEMP

REUTERS

4 July 2019

Distillate fuel oil supplied to U.S. consumers, 1990-2019

Percent change from prior year, monthly and 12-month average

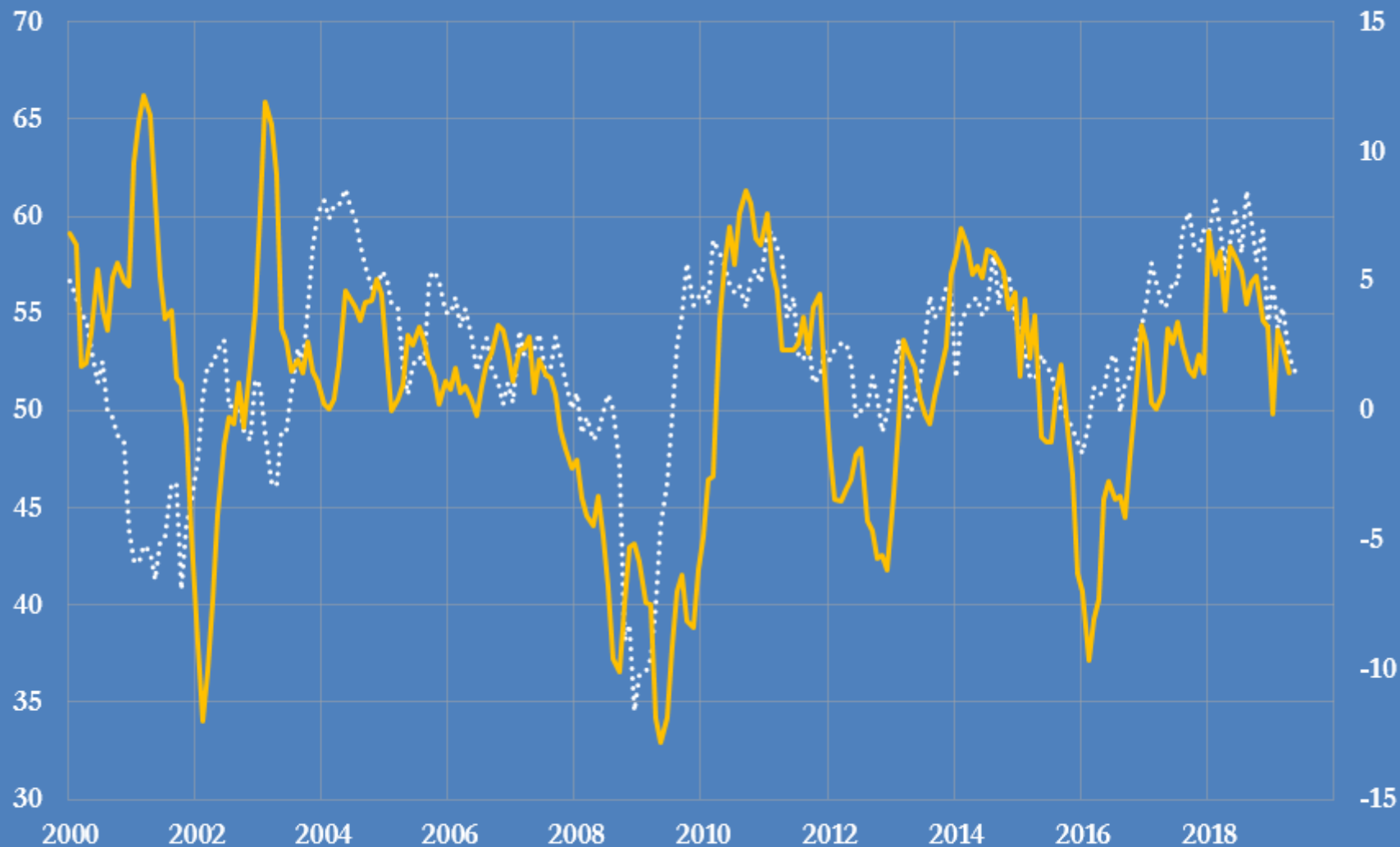


Source: U.S. Energy Information Administration
@JKempEnergy

Distillate fuel oil supplied to U.S. customers, 2000-2019

Percent change from prior year, three-month average

ISM manufacturing index shown

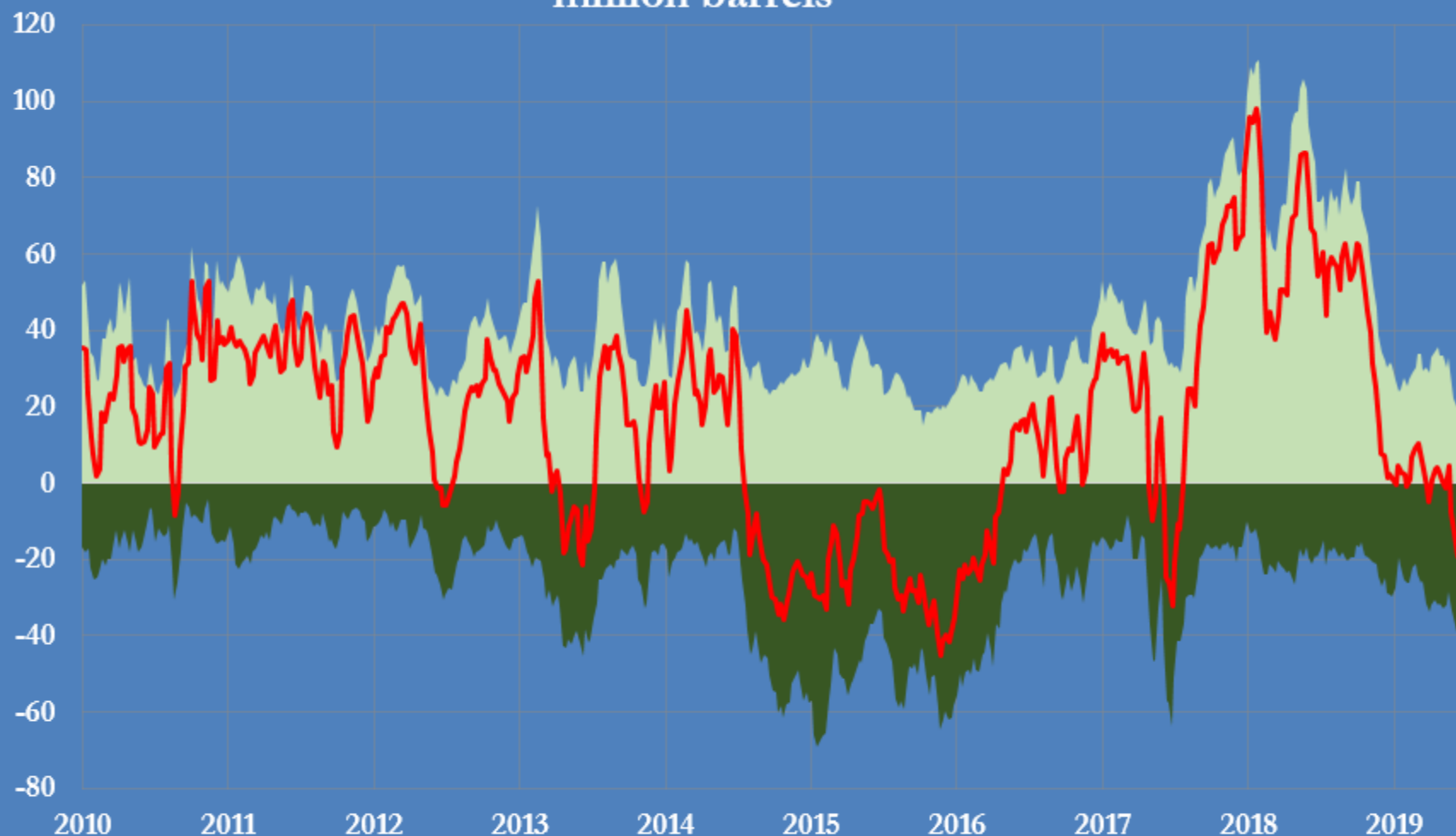


..... L-axis: ISM manufacturing index

— R-axis: Distillate supplied (YoY % chg)

Sources: U.S. Energy Information Administration and
Institute for Supply Management; @JKempEnergy

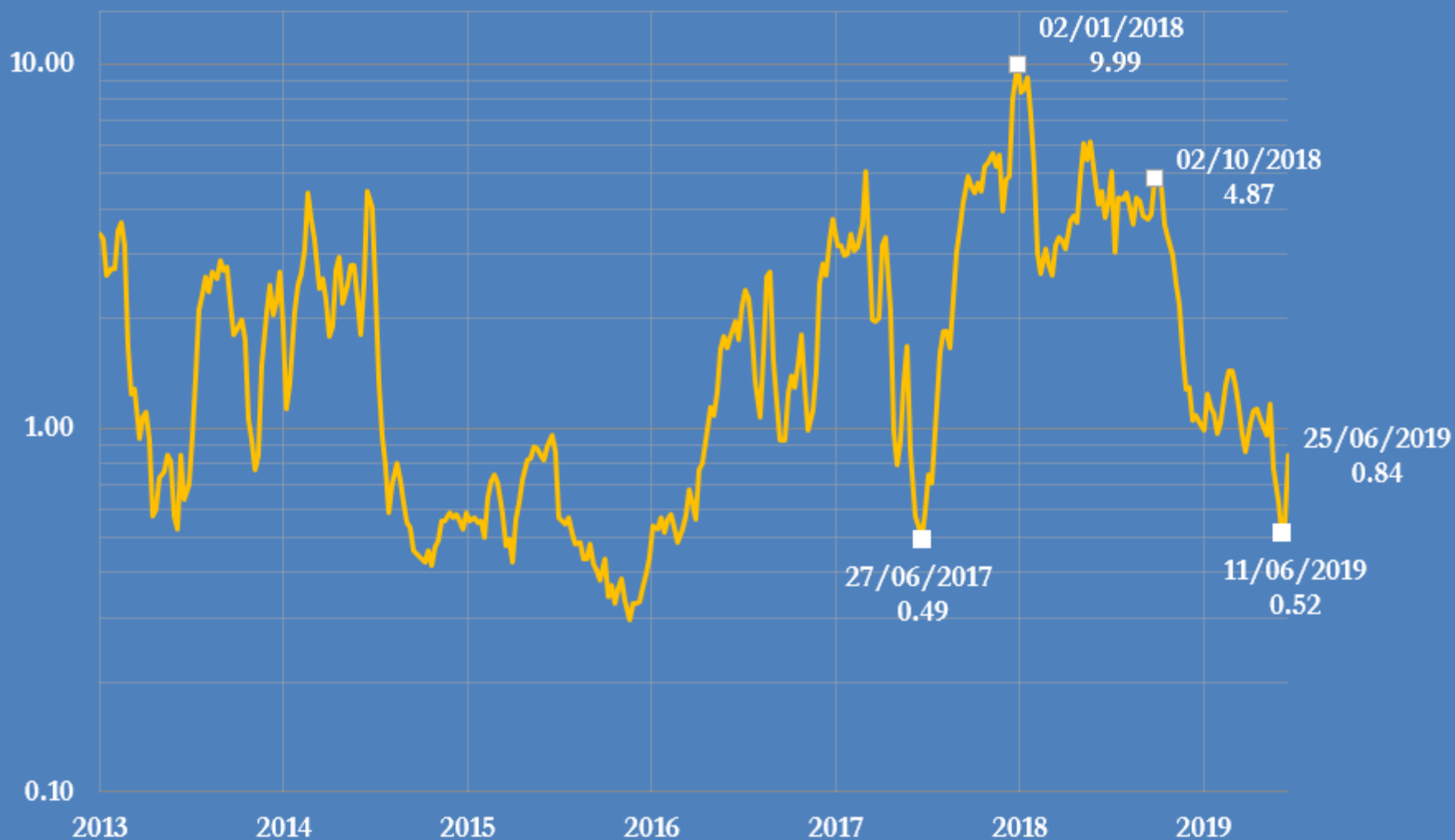
Money managers' long and short positions in New York heating oil futures and options, NYMEX #2 heating oil, million barrels



Long positions
Short positions
Net long position

Source: US Commodity Futures Trading Commission
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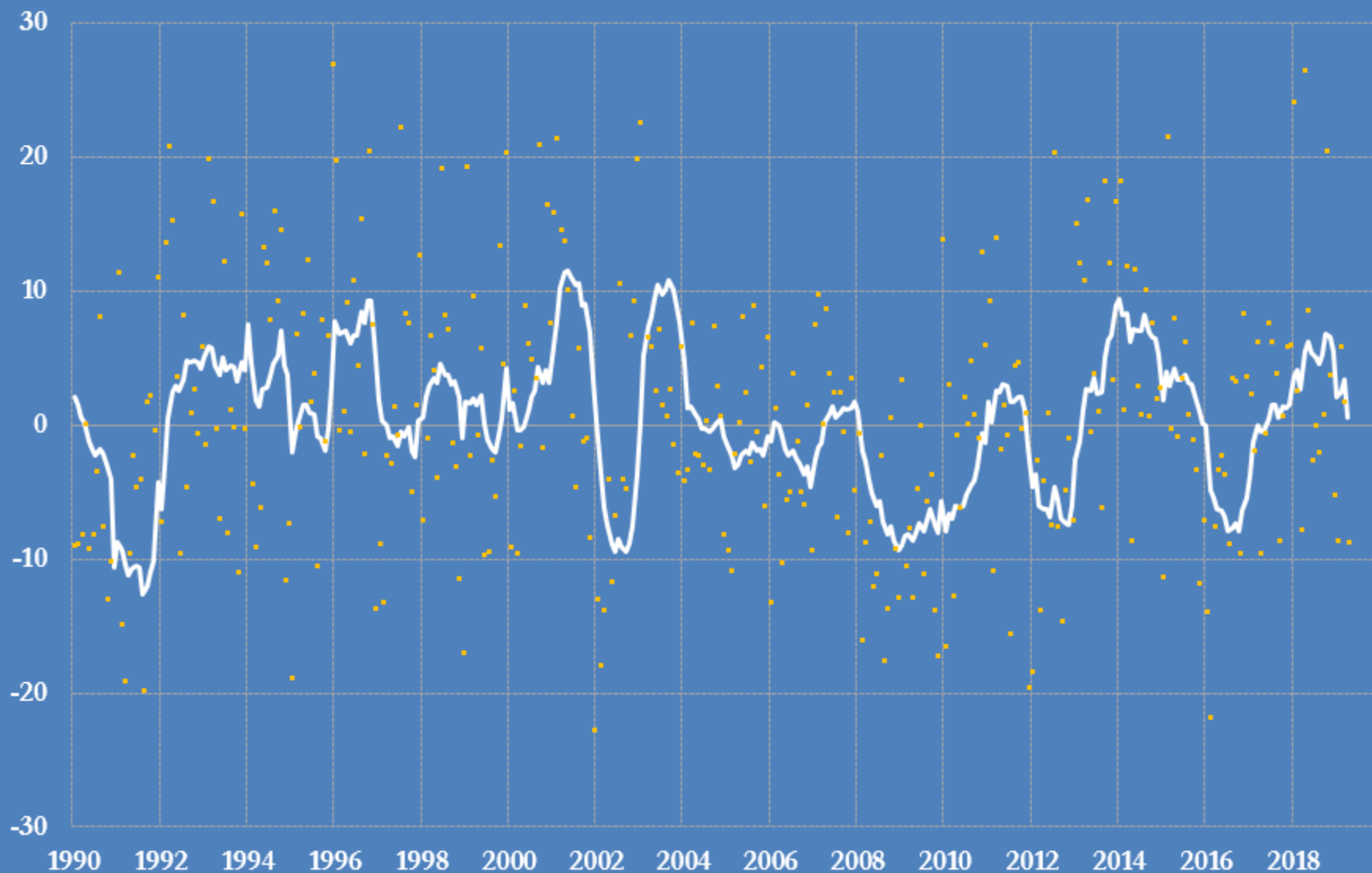
Ratio of money managers' long to short positions in New York #2 heating oil futures and options (log scale)



Source: US Commodity Futures Trading Commission
@JKempEnergy

Distillate fuel oil supplied to U.S. East Coast consumers

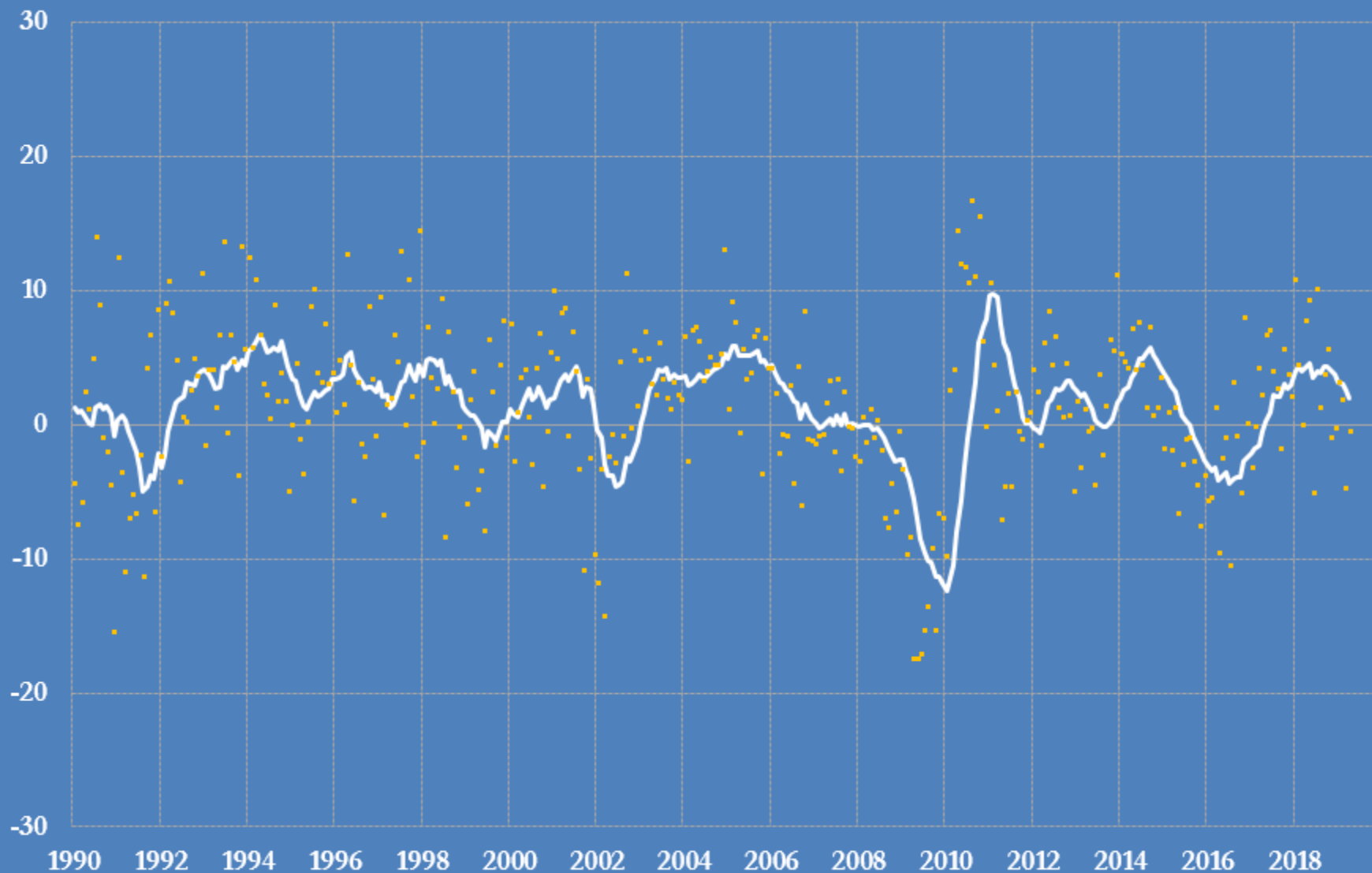
Percent change from prior year, monthly and 12-month average



Source: U.S. Energy Information Administration
@JKempEnergy

Distillate fuel oil supplied to U.S. Midwest consumers

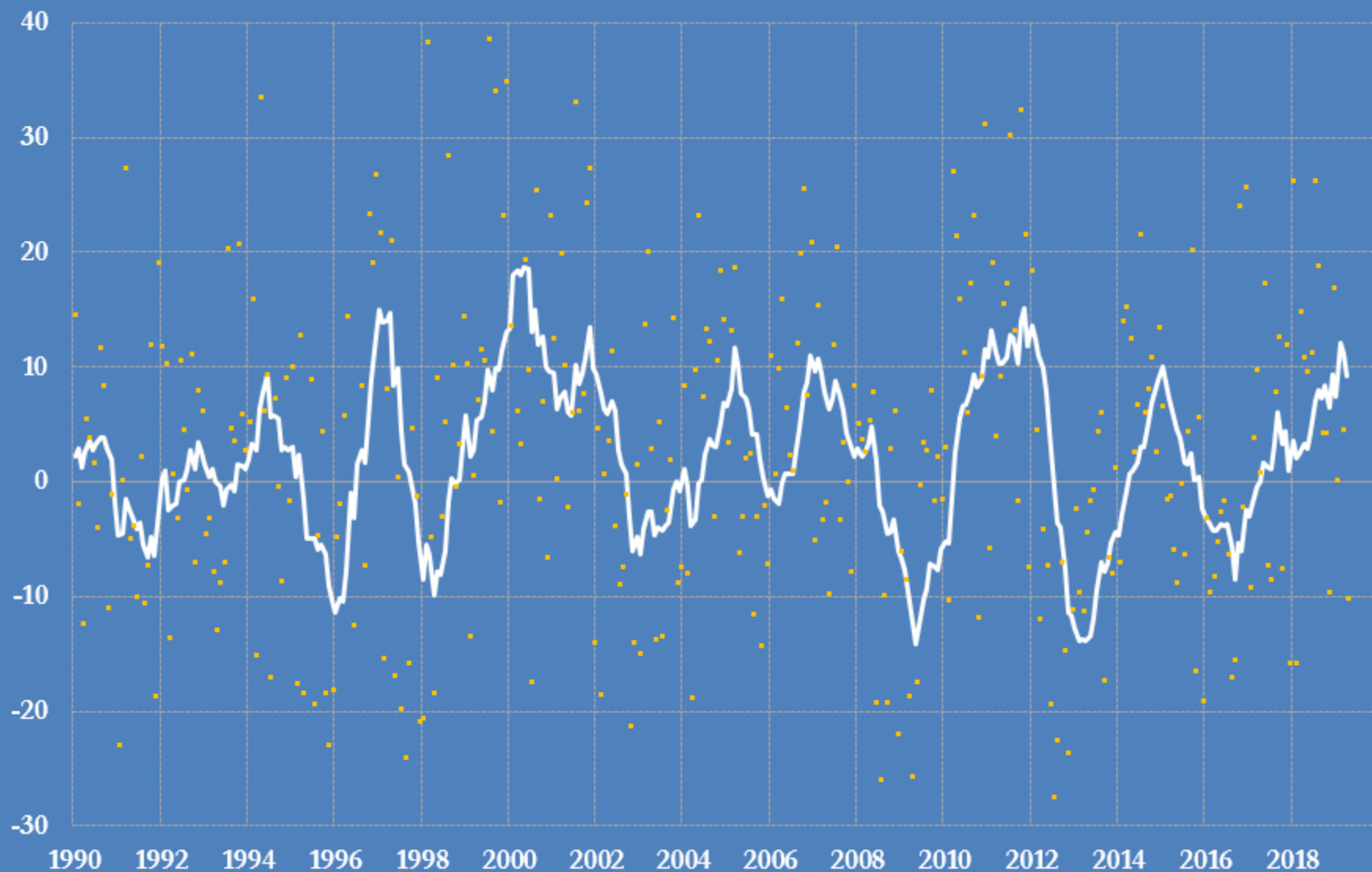
Percent change from prior year, monthly and 12-month average



Source: U.S. Energy Information Administration
@JKempEnergy

Distillate fuel oil supplied to U.S. Gulf Coast consumers

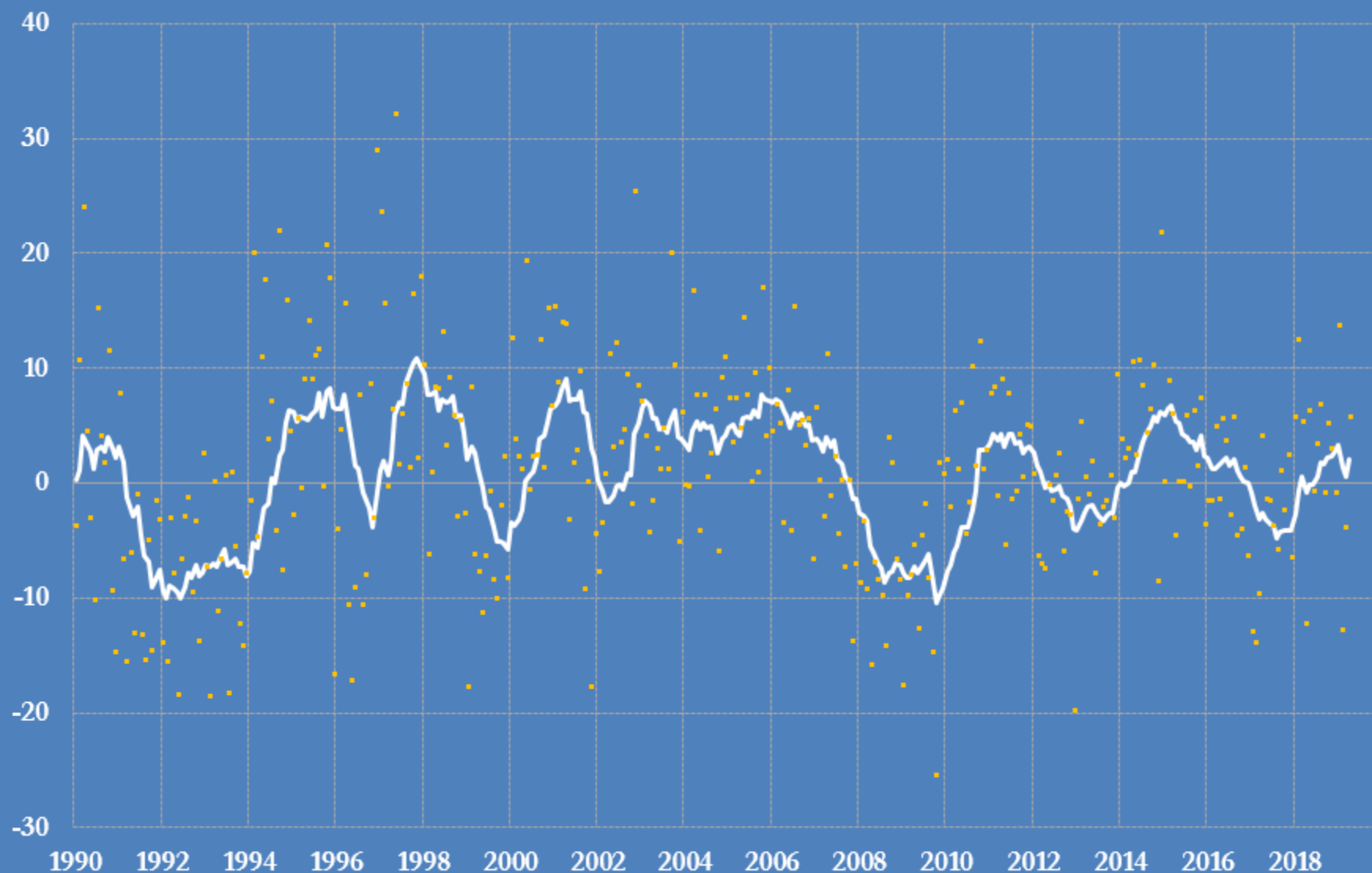
Percent change from prior year, monthly and 12-month average



Source: U.S. Energy Information Administration
@JKempEnergy

Distillate fuel oil supplied to U.S. West Coast consumers

Percent change from prior year, monthly and three-month average



Source: U.S. Energy Information Administration
@JKempEnergy