



CDTFA
CALIFORNIA DEPARTMENT OF
TAX AND FEE ADMINISTRATION

Managing the Transportation Fuels Transition: An Update on Ensuring an Affordable and Reliable Fuel Supply

June 3, 2026

Senate Committee on Energy, Utilities, and
Communications

Genti Droboniku

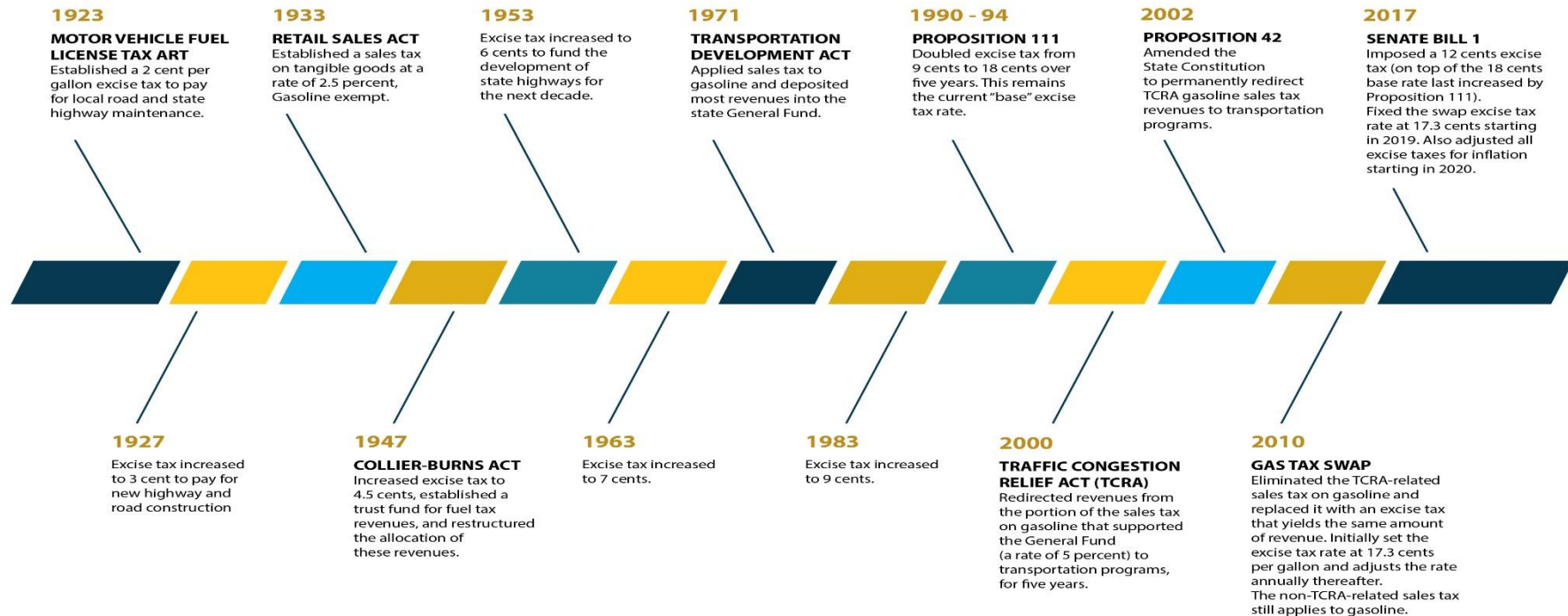


Gasoline Price Report Highlights

- Gasoline Excise Tax History
- Sales and Revenue Over Time
- California Retail Market and Retail Margins
- Price Variation and the Increasing Gap Between Brands
- Further Analysis

Major Changes to State Excise and Sales Taxes on Gasoline

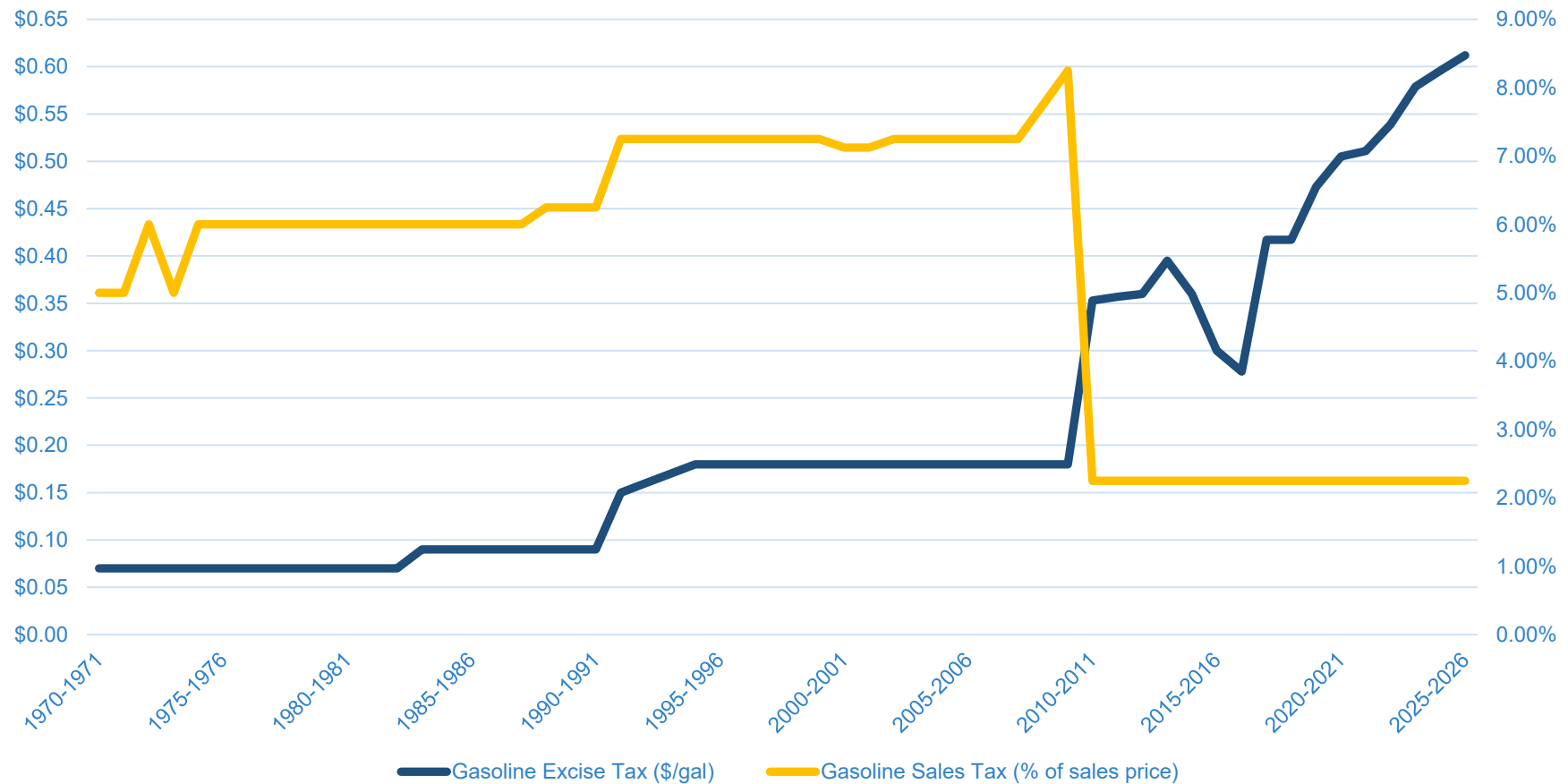
Major Changes to State Excise and Sales Taxes on Gasoline





California Gasoline Excise Tax (\$) and State Sales Tax (%) Rates (FY 1970-2025)

California Gasoline Excise Tax (\$) and State Sales Tax (%) Rates (1971-2025)





California Gasoline Excise Tax Adjusted for Inflation (FY 1923-2025)

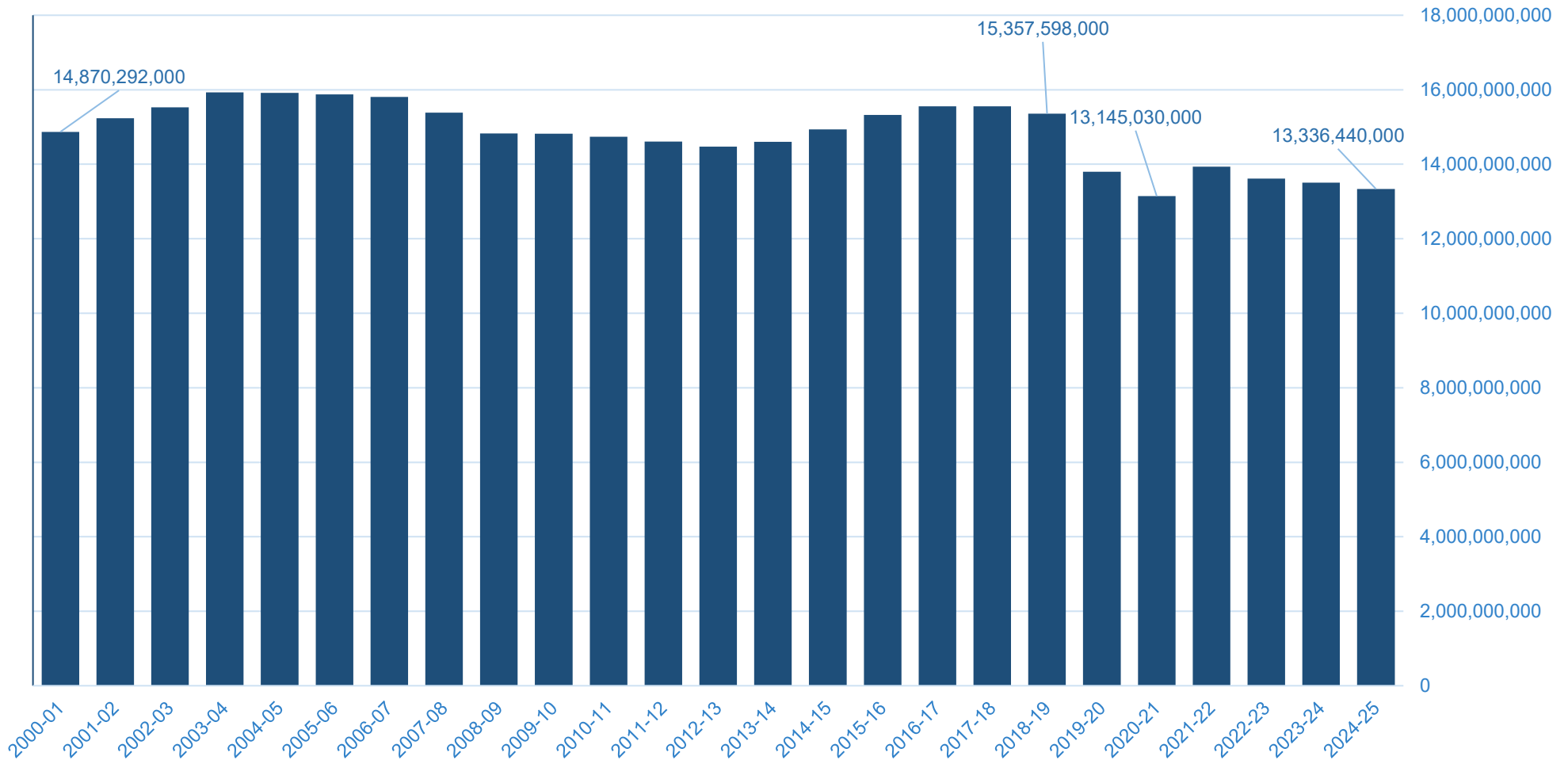
California Gasoline Excise Tax, (1923-2026), Real 2025 dollars





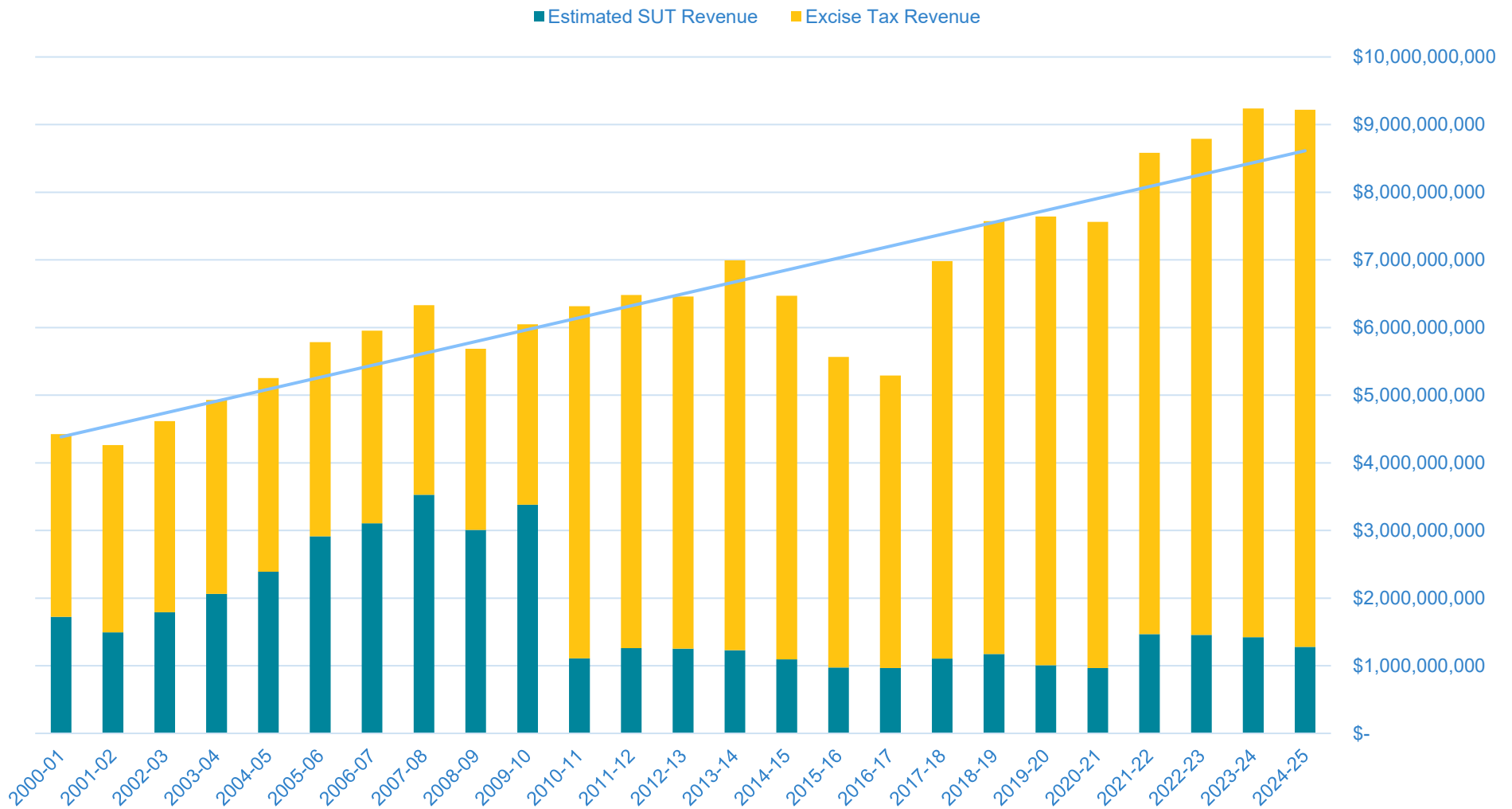
California Gasoline Gallons Sold (FY 2000-2024)

Gasoline Volume Sold (FY 2000-2025)



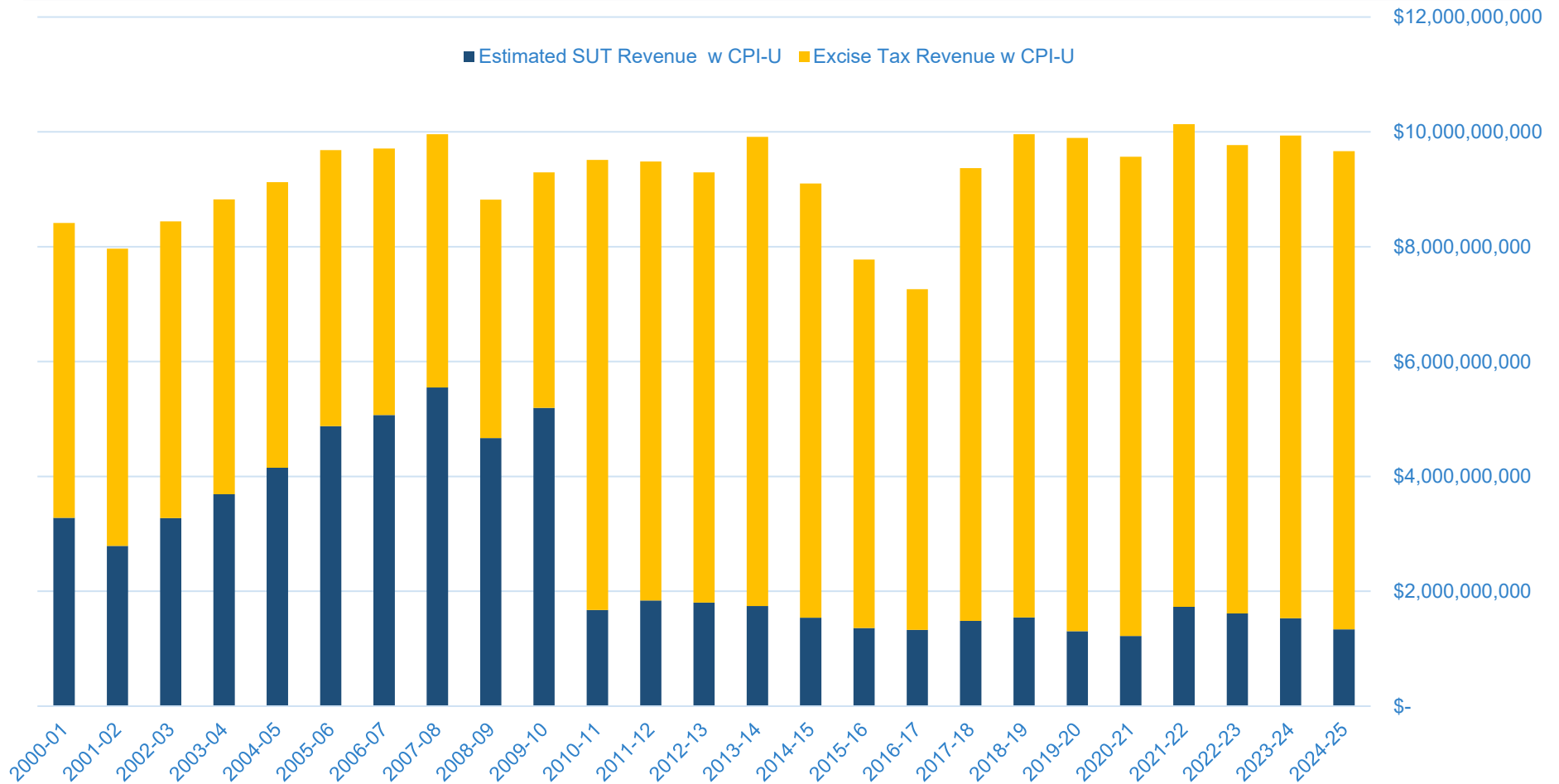


California Gasoline Revenue

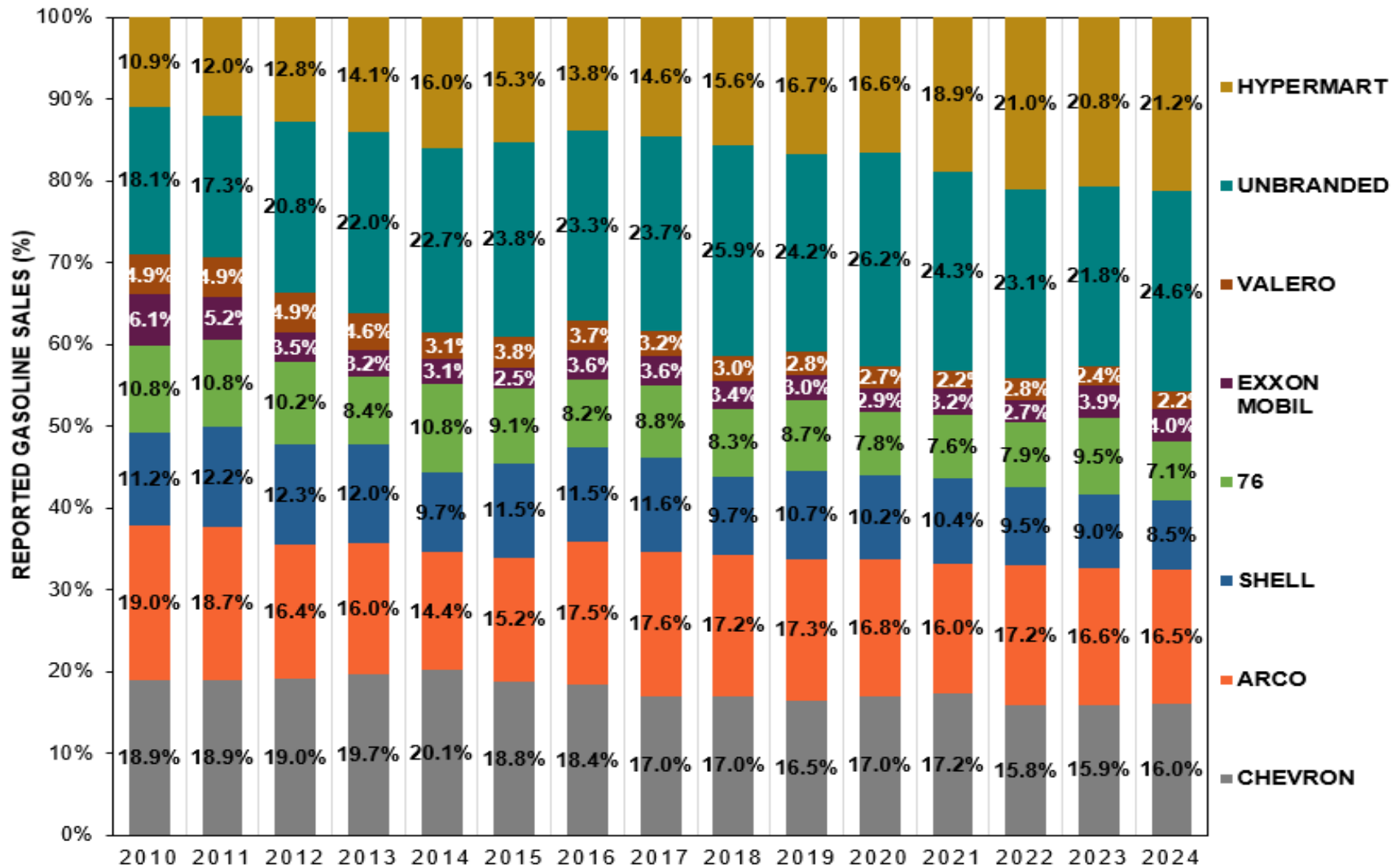




Inflation-Adjusted California Gasoline Revenue



California Retail Gasoline Market Share, 2010–2024

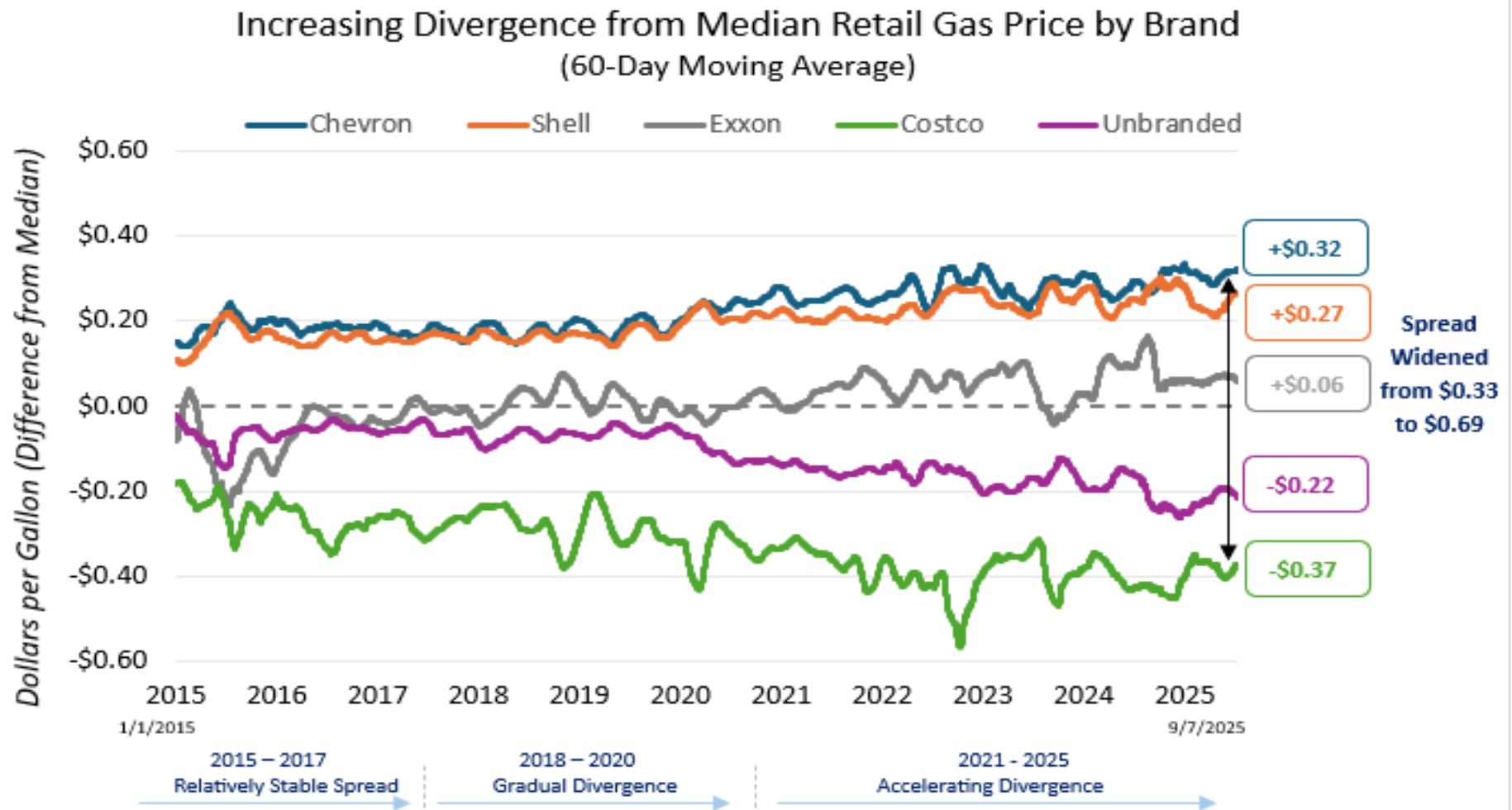


Retail Price and Margin

Year	Branded												Unbranded			Hypermart		
	Chevron			Shell			76			ARCO			Retail Price	Retail Margin	Retail Margin as % of Price	Retail Price	Retail Margin	Retail Margin as % of Price
	Retail Price	Retail Margin	Retail Margin as % of Price	Retail Price	Retail Margin	Retail Margin as % of Price	Retail Price	Retail Margin	Retail Margin as % of Price	Retail Price	Retail Margin	Retail Margin as % of Price						
2013	\$ 3.97	\$ 0.35	8.9%	\$ 3.95	\$ 0.33	8.5%	\$ 3.94	\$ 0.32	8.1%	\$ 3.76	\$ 0.14	3.8%	\$ 3.82	\$ 0.24	6.3%	\$ 3.72	\$ 0.16	4.4%
2014	\$ 3.85	\$ 0.41	10.7%	\$ 3.82	\$ 0.40	10.5%	\$ 3.81	\$ 0.38	10.0%	\$ 3.59	\$ 0.24	6.8%	\$ 3.66	\$ 0.33	8.9%	\$ 3.55	\$ 0.23	6.5%
2015	\$ 3.30	\$ 0.48	14.6%	\$ 3.26	\$ 0.46	14.1%	\$ 3.26	\$ 0.44	13.6%	\$ 3.01	\$ 0.24	7.9%	\$ 3.05	\$ 0.35	11.5%	\$ 2.88	\$ 0.21	7.4%
2016	\$ 2.88	\$ 0.49	17.1%	\$ 2.84	\$ 0.47	16.5%	\$ 2.82	\$ 0.44	15.8%	\$ 2.53	\$ 0.24	9.7%	\$ 2.59	\$ 0.36	14.0%	\$ 2.43	\$ 0.23	9.4%
2017	\$ 3.16	\$ 0.49	15.5%	\$ 3.13	\$ 0.48	15.4%	\$ 3.09	\$ 0.43	13.9%	\$ 2.80	\$ 0.26	9.1%	\$ 2.88	\$ 0.35	12.1%	\$ 2.72	\$ 0.21	7.7%
2018	\$ 3.72	\$ 0.52	14.1%	\$ 3.68	\$ 0.51	14.0%	\$ 3.64	\$ 0.46	12.6%	\$ 3.35	\$ 0.30	8.9%	\$ 3.42	\$ 0.37	11.0%	\$ 3.26	\$ 0.24	7.3%
2019	\$ 3.88	\$ 0.61	15.6%	\$ 3.85	\$ 0.63	16.4%	\$ 3.79	\$ 0.55	14.6%	\$ 3.51	\$ 0.35	10.1%	\$ 3.59	\$ 0.45	12.4%	\$ 3.42	\$ 0.30	8.7%
2020	\$ 3.37	\$ 0.68	20.3%	\$ 3.33	\$ 0.72	21.7%	\$ 3.25	\$ 0.62	19.2%	\$ 2.96	\$ 0.44	14.7%	\$ 3.03	\$ 0.51	17.0%	\$ 2.84	\$ 0.35	12.4%
2021	\$ 4.37	\$ 0.62	14.2%	\$ 4.32	\$ 0.65	15.0%	\$ 4.24	\$ 0.53	12.5%	\$ 3.97	\$ 0.42	10.6%	\$ 4.00	\$ 0.43	10.9%	\$ 3.83	\$ 0.28	7.3%
2022	\$ 5.72	\$ 0.93	16.2%	\$ 5.68	\$ 0.93	16.4%	\$ 5.55	\$ 0.80	14.5%	\$ 5.31	\$ 0.65	12.3%	\$ 5.30	\$ 0.65	12.2%	\$ 5.04	\$ 0.42	8.4%
2023	\$ 5.21	\$ 0.83	16.0%	\$ 5.18	\$ 0.83	16.0%	\$ 5.04	\$ 0.70	13.9%	\$ 4.78	\$ 0.53	11.2%	\$ 4.76	\$ 0.53	11.1%	\$ 4.52	\$ 0.31	6.9%
2024	\$ 5.06	\$ 0.85	16.8%	\$ 5.01	\$ 0.82	16.4%	\$ 4.86	\$ 0.70	14.4%	\$ 4.60	\$ 0.55	11.9%	\$ 4.57	\$ 0.53	11.7%	\$ 4.35	\$ 0.33	7.5%
2025	\$ 4.95	\$ 0.87	17.6%	\$ 4.88	\$ 0.83	16.9%	\$ 4.73	\$ 0.71	14.9%	\$ 4.45	\$ 0.44	9.9%	\$ 4.41	\$ 0.45	10.3%	\$ 4.22	\$ 0.27	6.4%

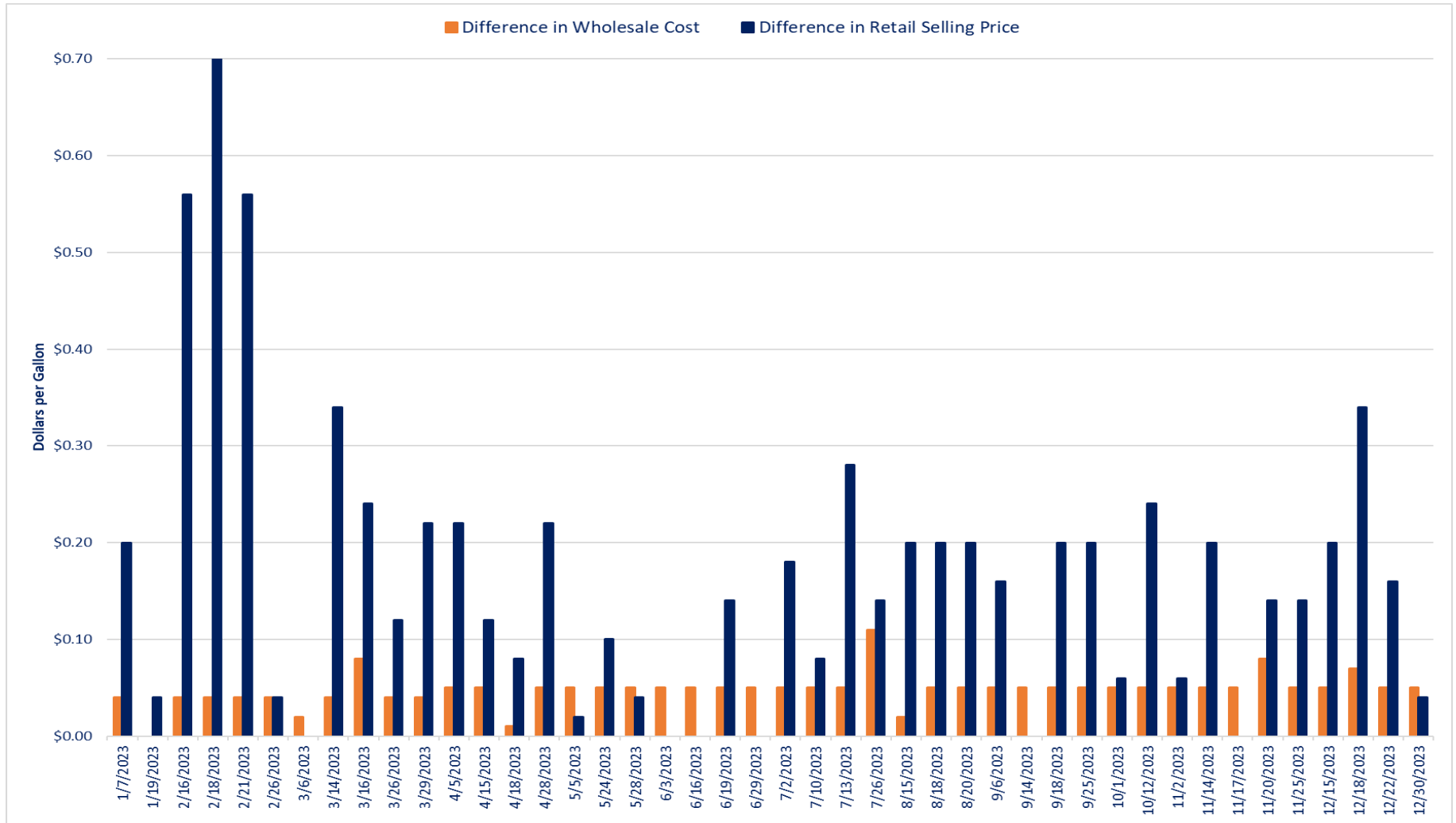


Accelerating Divergence from Median Retail Gas Price



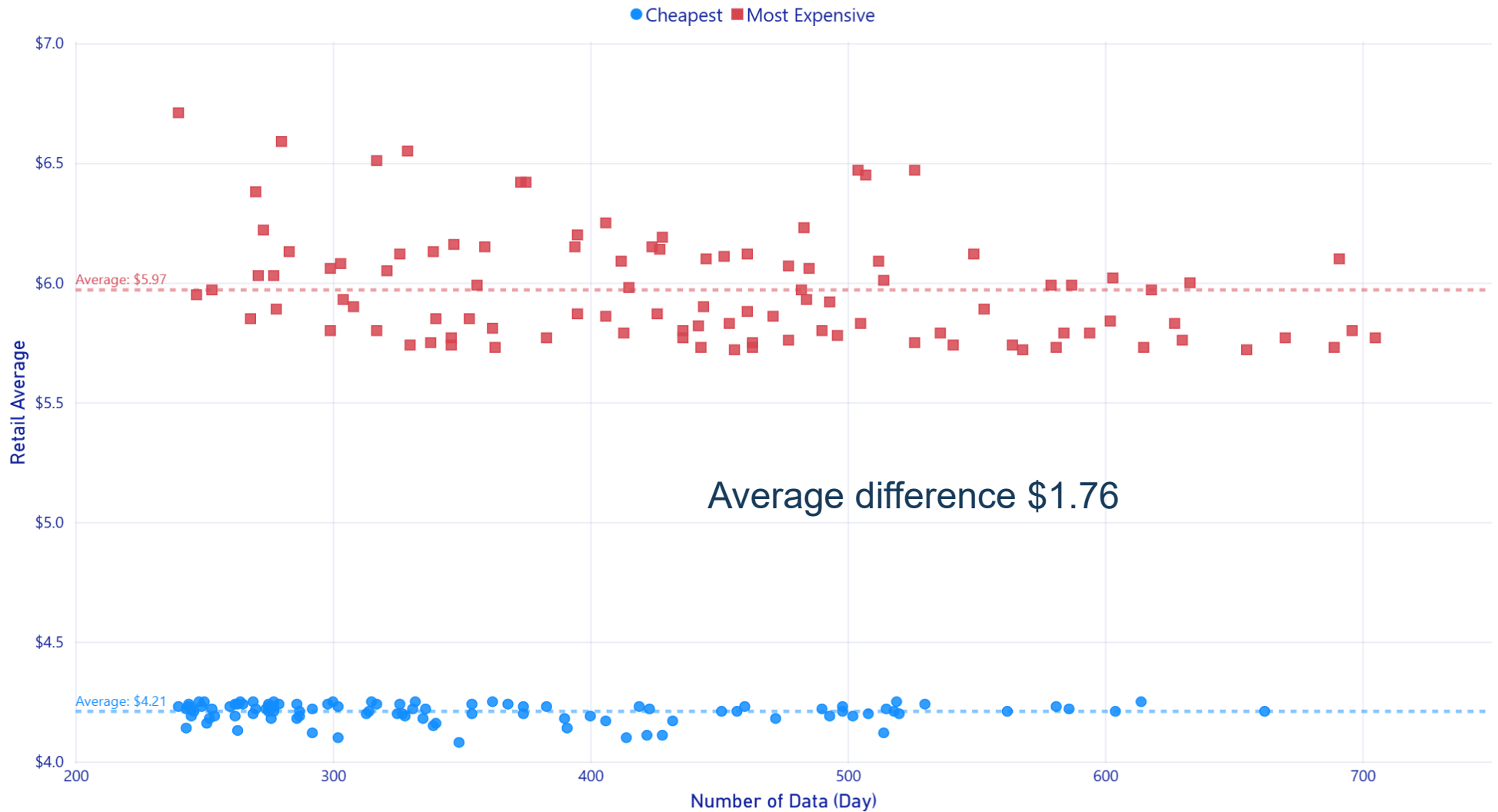


Retail Price Difference Two Gas Stations Selling the Same Brand and Grade



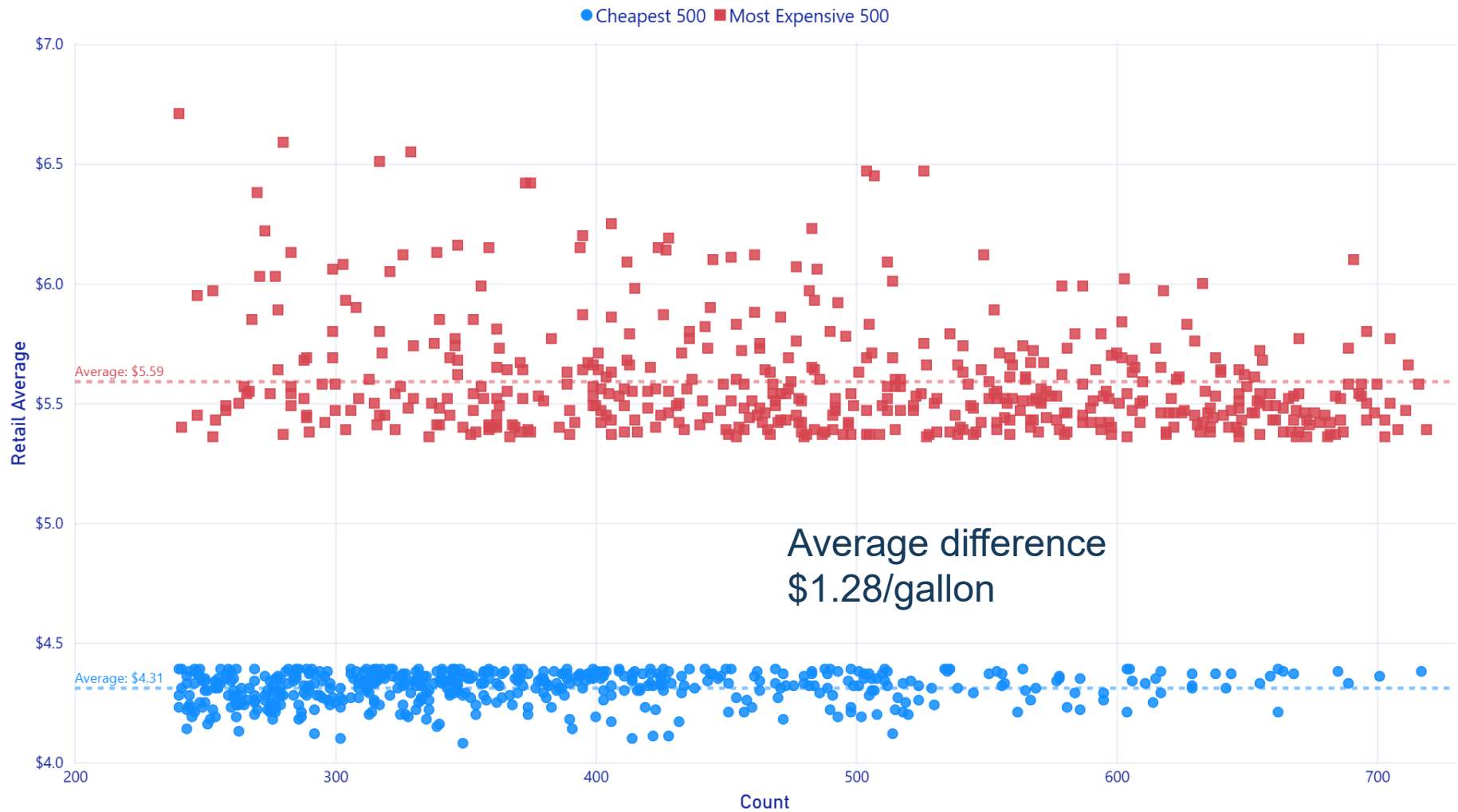


Top vs. Bottom 100 Gas Stations. Significant Retail Price Difference





Top vs. Bottom 500 Gas Stations





Further Analysis

- Retail outlet ownership concentration statewide and in local markets.
- The widespread use of new pricing software systems and their impact on prices.
- How shifts in pricing strategies for brands may be impacting the broader market as well as local competition in the gasoline retail market