MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

AIDE MEMOIRE

Publishing bulk storage facilities demand data

Date:	5 May 2026	**Priority:**	High
Security classification:	Restricted	**Tracking number:**	REQ-0032052

Information for Minister(s)
Hon Nicola Willis **Minister of Finance**
Hon Shane Jones **Associate Minister for Energy**

Contact for telephone discussion (if required)				
Name	**Position**	**Telephone**		**1st contact**
Eric Chapman	Head of Fuel Response Data Cell	N/A	Privacy of natural persons	✓
Sarah Drought	Principal Policy Advisor, Economic Development Policy			

The following departments/agencies have been consulted

Minister's office to complete:

- ☐ Approved
- ☐ Noted
- ☐ Seen
- ☐ See Minister's Notes
- ☐ Declined
- ☐ Needs change
- ☐ Overtaken by Events
- ☐ Withdrawn

Comments

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Purpose

As requested by Ministers MBIE is planning to publish bulk storage facilities demand data on Wednesday. This paper outlines how MBIE proposes to present the data and why this differs from the current approach in the bi-weekly fuel monitoring pack.

The *draft* website content and Ministerial talking points for tomorrow's release are attached as appendices.

Privacy of natural persons

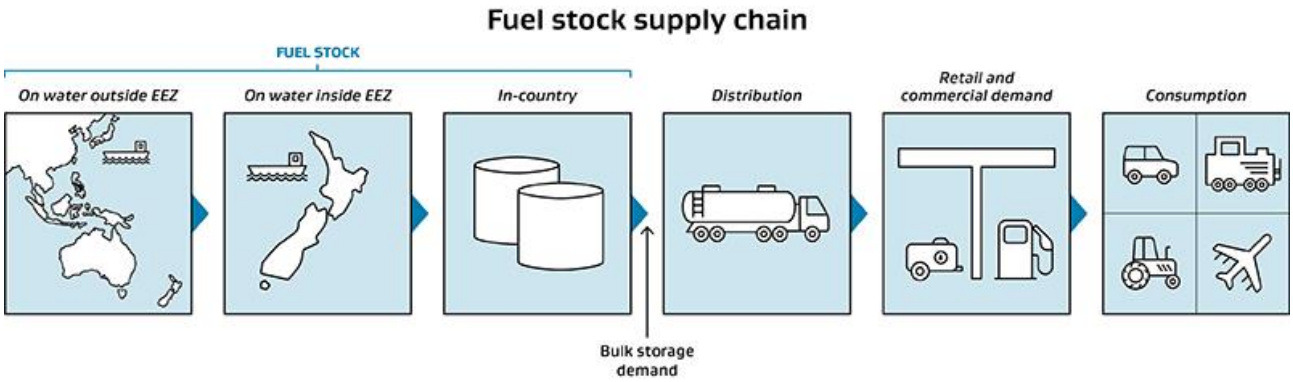
Eric Chapman
Head of Fuel Response Data Cell
MBIE

05 / 05 / 2026

MBIE is planning to publish bulk storage demand data on Wednesday alongside fuel stocks data

1. MBIE has undertaken external quality assurance on the bulk storage facilities demand data which concludes that MBIE's methods are reasonable and robust [refer REQ-0031965]. MBIE is planning to publish this data on Wednesday alongside the regular fuel stocks reporting.

2. Bulk fuel storage facilities demand data reported by fuel companies shows how much fuel is being drawn from storage facilities for distribution to, for example, petrol stations, farms and other commercial users. The infographic below shows where in the supply chain bulk storage demand is measured.



3. Bulk storage facilities demand is different from consumption. It represents fuel supplied into the downstream distribution system and is a reliable proxy for consumption over time, but is not a direct measure of end use.

4. Publishing bulk storage facilities demand data will improve transparency around how fuel demand is responding to changing conditions from the Iran conflict. However, as this is a new dataset, it should be treated as an emerging indicator rather than a definitive measure.

The nature of fuel demand influences how the data should be presented and the frequency of publication

5. Fuel demand is inherently complex because it is a critical input for economic activity and underpins many aspects of everyday life. Each fuel type has different underlying drivers and responds differently to changing conditions such as higher fuel prices.

6. Fuel demand is influenced significantly by seasonal patterns and external factors such as weather events, public holidays, and broader trends in economic activity. April is a particularly challenging month due to the changing dates of Easter, school holidays and weather events including Cyclone Vaianu in 2026.

7. The bulk storage facilities demand data can be quite noisy from week to week. Our experience working with the data over the past month, has highlighted that presentation of the data in bi-weekly fuel monitoring pack is not optimal to best describe and understand changes in fuel demand in the public arena. For example, comparing the latest week's data to the week prior to the beginning of the conflict is complicated by strong seasonal trends, especially for diesel and jet fuel as demand is near its peak in February and declines substantially as we move towards winter.

MBIE proposes to publish the data in more simplified structure compared to the current bi-weekly data pack

8. MBIE proposes a shift from some of the existing comparisons in the bi-weekly data pack, and plans to publish the demand data for each fuel type in the following way:

    a. Line chart showing demand in 2026 (so far) compared to 2025

    b. Table showing the daily average demand of completed months in 2026 compared to 2025 (January, February, March, April)

    c. Weekly time-series of the demand data (daily average across the week) from the start of conflict compared to last year

    d. CSV file with daily data

9. MBIE's interpretation of the data and proposed talking points for Ministers would take a flexible approach to best explain how demand is evolving for the specific fuel type, rather than being bound by pre-determined comparisons. This is highlighted by the proposed content for Wednesday's release where describing the dynamic in diesel demand requires a different approach from jet fuel demand.

10. Publishing the weekly time-series from the start of the conflict and the CSV file with daily data provides transparency of the full data set and enables the public, including economists and other interested parties, to undertake their own analysis.

MBIE proposes the bulk storage facilities demand data is published weekly, as recommended by Infometrics in its recent review

11. Due to the complexity of interpreting and explaining the trends across fuel types, including triangulating with other indicators, MBIE is proposing publishing demand data at a weekly frequency, compared to the bi-weekly frequency of the fuel stocks update. Weekly publication strikes a good balance between providing frequent public updates on fuel demand, while ensuring that the data and interpretations are robust. It is also consistent with the recommendation from Infometrics as part of its external review.

Demand data will be published on a separate web page to fuel stocks

12. MBIE is planning to publish the data on a separate webpage to fuel stocks to clearly distinguish it as a separate, but related, data series and topic. The current fuel stocks page is already long, so we don't recommend adding more content to it. Having a separate webpage will also simplify the process to publish demand data at a different frequency to stocks data.

Next steps

13. Subject to the usual communication approval process for regular fuel stocks reporting, MBIE will publish demand data in the format described on the MBIE website on Wednesday 6 May 2026, and weekly thereafter.

Appendix

1. DRAFT MBIE web page Bulk Storage Demand Data
2. DRAFT Ministerial talking points – 5 May 2026 Bulk Storage Facilities Demand

Fuel demand update

Published: 6 May 2026

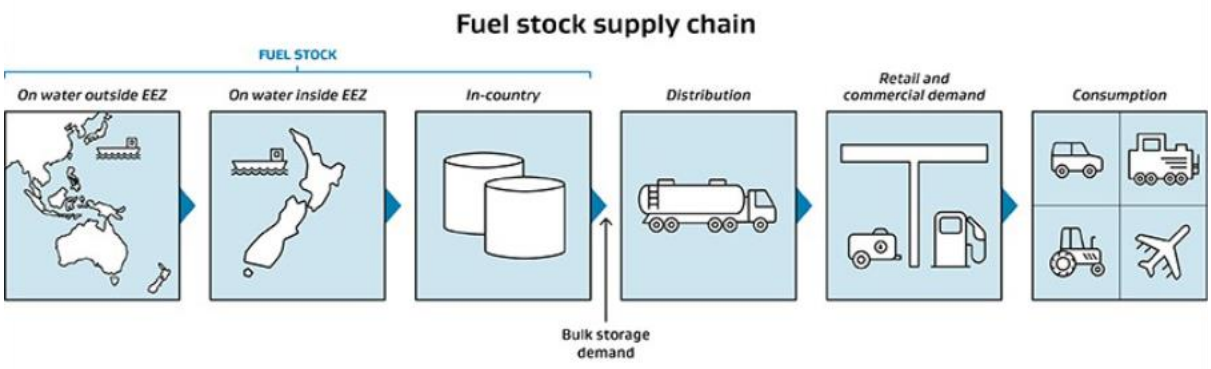
MBIE has made changes to the national fuel data published on our website. Alongside twice weekly updates on fuel stocks, we are now publishing data on demand from bulk storage facilities to create a detailed picture of fuel demand over time in New Zealand.

We will publish the latest information on current fuel demand on this page every Wednesday afternoon.

Bulk storage demand

Bulk storage demand data reported by fuel companies shows how much fuel is being drawn from storage facilities for distribution to, for example, petrol stations, farms and other commercial users.

This infographic shows the fuel supply chain and where in the supply chain fuel stocks and bulk storage demand are measured.



Demand data is different from consumption data. Demand data represents the fuel supplied into the downstream distribution system. It is an indicator but not a direct measure of fuel consumption, or use. This is because fuel is also held in storage tanks beyond terminals – at service stations, truck stops, airports and customer sites.

Consumption data is a measure of fuel that is used (for example when driving a car, using a tractor, running a generator or heating a building).

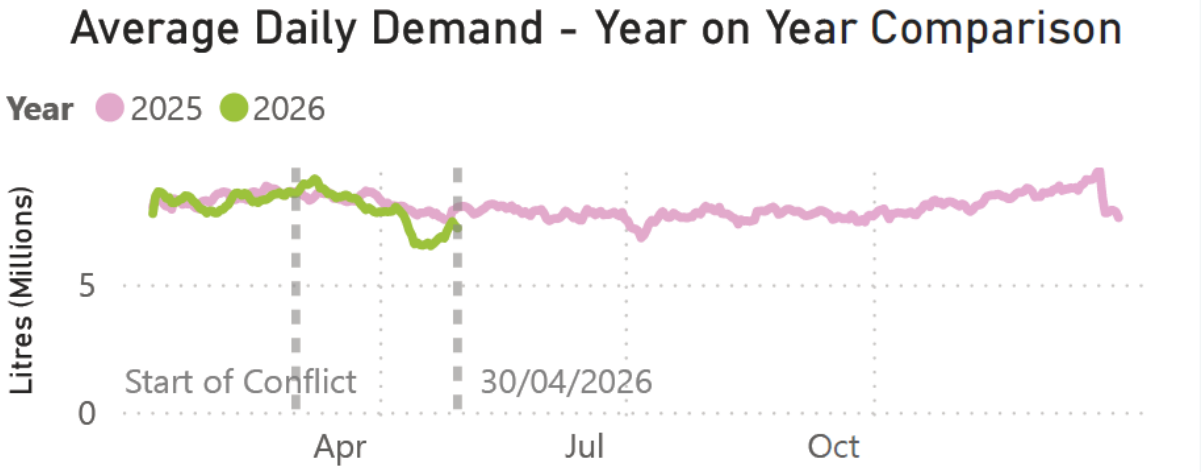
Travel indicators, such as Vehicle Kilometres Travelled, provide another indication of fuel consumption. More information about transport demand indicators can be found on the Ministry of Transport's dashboard:

Fuel response monitoring dashboard | Ministry of Transport

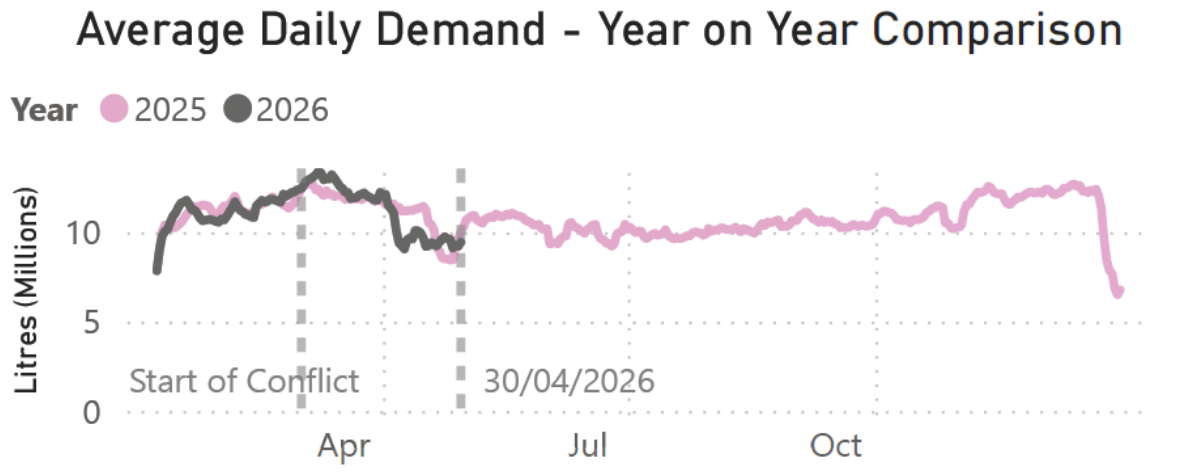
Trends in demand for petrol, diesel and jet fuel

This demand data is as at 30 April with a starting date of 7 January 2025. We will update this data each week.

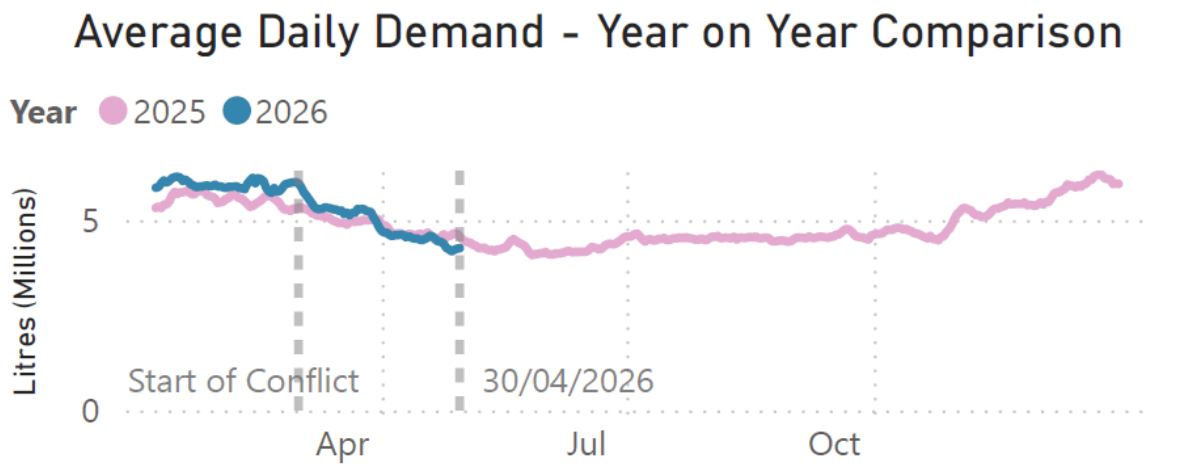
Petrol demand – year-on-year comparison



Diesel demand – year-on-year comparison



Jet fuel demand – year-on-year comparison



Fuel Demand Comparisons

Fuel demand is inherently complex because fuel underpins almost every aspect of economic activity and daily life.

Prior to the conflict period, fuel demand was trending upward, which is consistent with expectations during periods of economic growth, with the increase most evident in jet fuel.

Demand by week can be affected by public holidays and weather events, this is particularly evident in April due to Easter and Anzac Day, which makes comparison by month more appropriate than weekly comparisons.

Petrol

- Petrol had a modest increase in demand (up 1.2%) in March which has been followed by a sharp fall in April (down 8.9%) compared to March and April in 2025.

Diesel

- A sharp increase in demand for diesel (up 6.8%) occurred in March with a corresponding sharp fall in April (down 7.5%) compared to March and April in 2025.

Jet fuel

- Jet fuel demand was elevated through January (up 5.4%) and February (up 7.3%), in March (up 4%) and April (down 2.2%) jet fuel demand fell sharply from these earlier highs compared to March and April in 2025.

Monthly fuel demand

Monthly Petrol Demand (monthly ML/day)

Month	2025	2026	% Change
Jan	8.2	8.0	-2.4%
Feb	8.6	8.5	-1.2%
Mar	8.3	8.4	1.2%
Apr	7.9	7.2	-8.9%

Monthly Diesel Demand (monthly ML/day)

Month	2025	2026	% Change
Jan	10.5	10.2	-2.9%
Feb	11.7	11.7	0.0%
Mar	11.7	12.5	6.8%
Apr	10.6	9.8	-7.5%

Monthly Jet Fuel Demand (monthly average ML/day)

Month	2025	2026	% Change
Jan	5.6	5.9	5.4%
Feb	5.5	5.9	7.3%
Mar	5.0	5.2	4.0%
Apr	4.6	4.5	-2.2%

Weekly fuel demand

Weekly Petrol Demand (weekly average ML/day) since start of conflict

Week Ending	2025	2026	% Change
5-Mar	8.4	8.9	6%
12-Mar	8.5	8.7	2.4%

19-Mar	8.3	8.5	2.4%
26-Mar	8.5	8	-5.9%
2-Apr	8.2	7.8	-4.9%
9-Apr	8.1	7.8	-3.7%
16-Apr	7.8	6.5	-16.7%
23-Apr	7.7	6.8	-11.7%
30-Apr	8	7.2	-10%

Weekly Diesel Demand (weekly average ML/day) since start of conflict

Week Ending	2025	2026	% Change
5-Mar	12.8	13	1.6%
12-Mar	12.1	13	7.4%
19-Mar	11.9	12.2	2.5%
26-Mar	12	12	0%
2-Apr	11.5	12.1	5.2%
9-Apr	11.2	9.1	-18.7%
16-Apr	11.4	9.7	-14.9%
23-Apr	8.6	9.6	11.6%
30-Apr	10	9.4	-6%

Weekly Jet fuel Demand (weekly average ML/day) since start of conflict

Week Ending	2025	2026	% Change
5-Mar	5.2	5.5	5.8%
12-Mar	5.1	5.3	3.9%
19-Mar	4.9	5.2	6.1%
26-Mar	5	5.3	6%
2-Apr	4.9	4.7	-4.1%
9-Apr	4.6	4.6	0%
16-Apr	4.6	4.5	-2.2%
23-Apr	4.6	4.4	-4.3%
30-Apr	4.6	4.3	-6.5%

Data Period and Quality

The data period is 1 January 2025 to 30 April 2026. Fuel companies provide the data on Tuesday and the data is usable from the previous Thursday.

Fuel company system and quality XX

Data file

XXX.xlsx

Disclaimer

MBIE endeavours, to the best of its knowledge and ability, to ensure the data provided and published is accurate. However, as the data is received from external sources, MBIE does not warrant that it is current, accurate or complete. The data may be changed, deleted, added to or otherwise amended at any time as new information becomes available.

New Zealand is continuing to closely monitor the impacts of the conflict in the Middle East on global fuel markets. While this is a fast-moving situation internationally, fuel

supply into New Zealand remains stable and onshore and incoming stocks are sufficient. There is currently no need for New Zealanders to change how they buy fuel.

It is important to remember that fuel supply is inherently dynamic, with stock levels fluctuating week to week as fuel is consumed and new shipments arrive. Changes in stock levels reflect normal patterns rather than supply disruption.

Fuel importers manage their imports in line with demand and minimum stockholding obligations. Fuel companies are providing immediate updates to officials if they are made aware of disrupted supply, and there have been no reports of material issues with future shipments.

More information

Fuel stocks update webpage

MoT dashboard

Fuel supply disruption response

Fuel security

MBIE media contact

Email: media@mbie.govt.nz

Ministerial talking points – 5 May 2026 Bulk Storage Facilities Demand

- MBIE has added fuel demand data to its website updates to improve transparency and clarity by reporting fuel demand trends alongside fuel stock availability.
- When we refer to fuel demand, we mean the amount of fuel drawn from import Bulk Storage Facilities for distribution, such as to service stations, truck stops and wholesale customers. This provides a nationwide view and an early indication of demand trends.
- Demand data is used consistently for calculating national fuel stocks, Minimum Stockholding Obligations (MSOs), and tracking changes in demand over time, and is provided by fuel importers.
- While this data is not a direct measure of end-use consumption, it is a good approximation, as actual consumption is difficult to measure in real time.
- As this is a new dataset, it should be treated as an emerging indicator rather than a definitive measure. Used alongside fuel stock data, it helps complete the overall picture of fuel availability and market conditions.
- MBIE will continue to work with fuel companies to enhance the quality and consistency of domestic fuel demand information.
- The demand analysis also relates to a period ending three days earlier than the latest fuel stock data, so the two datasets should be viewed as complementary rather than a single snapshot.
- Fuel demand is inherently complex because fuel underpins almost every aspect of economic activity and daily life.
- Each fuel type has different underlying drivers and responds differently to changing conditions such as higher prices.
- Demand by week can be affected by public holidays and weather events, this is particularly evident in April due to Easter and Anzac Day, which makes comparison by month more appropriate than weekly comparisons
- Jet fuel demand was elevated through January (up 5.4%) and February (up 7.3%), in March (up 4%) and April (down 2.2%) jet fuel demand fell sharply from these earlier highs compared to March and April in 2025.
- A sharp increase in demand for diesel (up 6.8%) occurred in March with a corresponding sharp fall in April (down 7.5%) compared to March and April in 2025.
- Petrol had a modest increase in demand (up 1.2%) in March which has been followed by a sharp fall in April (down 8.9%) compared to March and April in 2025.

- Prior to the conflict period, fuel demand was trending upward, which is consistent with expectations during periods of economic growth, with the increase most evident in jet fuel.

Factors that impact fuel demand

Fuel demand varies by fuel type, reflecting differences in end use, economic sensitivity, and substitution options.

Petrol demand is primarily driven by passenger vehicle travel and is closely linked to household income, commuting patterns, and vehicle fleet efficiency, making it relatively price sensitive and exposed to long-term declines from electrification.

Diesel demand is more closely tied to freight transport, construction, agriculture, and industrial activity, giving it a stronger link to economic growth and fewer short-term alternatives, which tends to make demand less responsive to price.

Jet fuel demand is distinct again, being almost entirely dependent on aviation activity. It has strong exposure to tourism, international trade, and global mobility trends, and high sensitivity to external shocks such as pandemics, geopolitics, or fuel cost volatility.

Fuel demand is also influenced by seasonal patterns and external factors such as weather events, holidays, and broader economic activity. April is a particularly challenging month due to school holidays, Easter which falls on different dates between 2025 and 2026 and weather events including Cyclone Vaianu in 2026.

Question and Answers

Q: Why is MBIE publishing fuel demand data now?
A: MBIE has added fuel demand data to improve transparency and provide clearer context alongside fuel stock availability. Reporting both demand and stock levels helps give a more complete picture of fuel market conditions and resilience.

Q: What exactly does MBIE mean by "fuel demand"?
A: Fuel demand refers to the volume of fuel drawn from Bulk Storage Facilities Demand for domestic distribution i.e. to service stations, truck stops, and wholesale customers. It provides a nationwide, near-real-time indicator of demand trends.

Q: Is this the same as actual fuel consumption by consumers?
A: No. It is not a direct measure of end-use consumption. However, it is a good approximation and is currently the most reliable indicator available in real time. Measuring actual consumption precisely and consistently is more complex.

Q: How is this data used by the government?
A: The same demand data is already used to calculate national fuel stocks, Minimum

Stockholding Obligations, and to track changes in fuel demand over time. It is supplied by fuel importers and applied consistently across these settings.

Q: How has Easter affected the numbers?
A: Easter timing has a significant impact. Easter Monday fell within this reporting week, whereas in 2025 Easter occurred later in April. As a result, Easter-related demand effects appear in different weeks across the two years.

Q: Why do the demand figures not align exactly with fuel stock data?
A: The demand data relates to a period ending three days earlier than the most recent fuel stock data. They are designed to be complementary datasets, not a single point-in-time snapshot.

Q: Should this data be treated as definitive?
A: No. This is a new dataset and should be treated as an emerging indicator. Used alongside fuel stock information and other metrics, it strengthens our overall understanding of fuel availability and market dynamics.

Q: What factors influence fuel demand differently for petrol, diesel, and jet fuel?
A:

- **Petrol** demand is driven mainly by passenger vehicle travel and household behaviour, making it more price-sensitive and exposed to long-term declines from efficiency improvements and electrification.
- **Diesel** demand is closely linked to freight, construction, agriculture, and industry, which makes it more tied to economic activity and generally less responsive to short-term price changes.
- **Jet fuel** demand depends almost entirely on aviation activity and is highly sensitive to tourism, international travel, and global shocks.

Q: Are recent weather events reflected in the data?
A: Yes. Fuel demand is influenced by seasonal and external factors, including school holidays, weather, and events such as Cyclone Vaianu, which can affect travel patterns and economic activity.

Q: What is MBIE doing to improve this data over time?
A: MBIE will continue working with fuel companies to enhance the quality, consistency, and usefulness of domestic fuel demand information as part of broader efforts to improve market transparency.