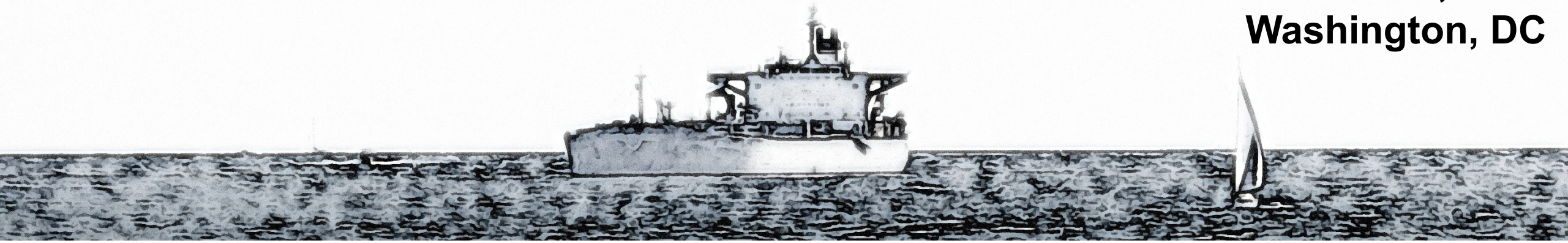
Chart of the Week #2026-27

The Jones Act Waiver Has Been Extended a Third Time. Here's What Happened After the Temporary First Waivers

Max Pyziur

November 18, 2026

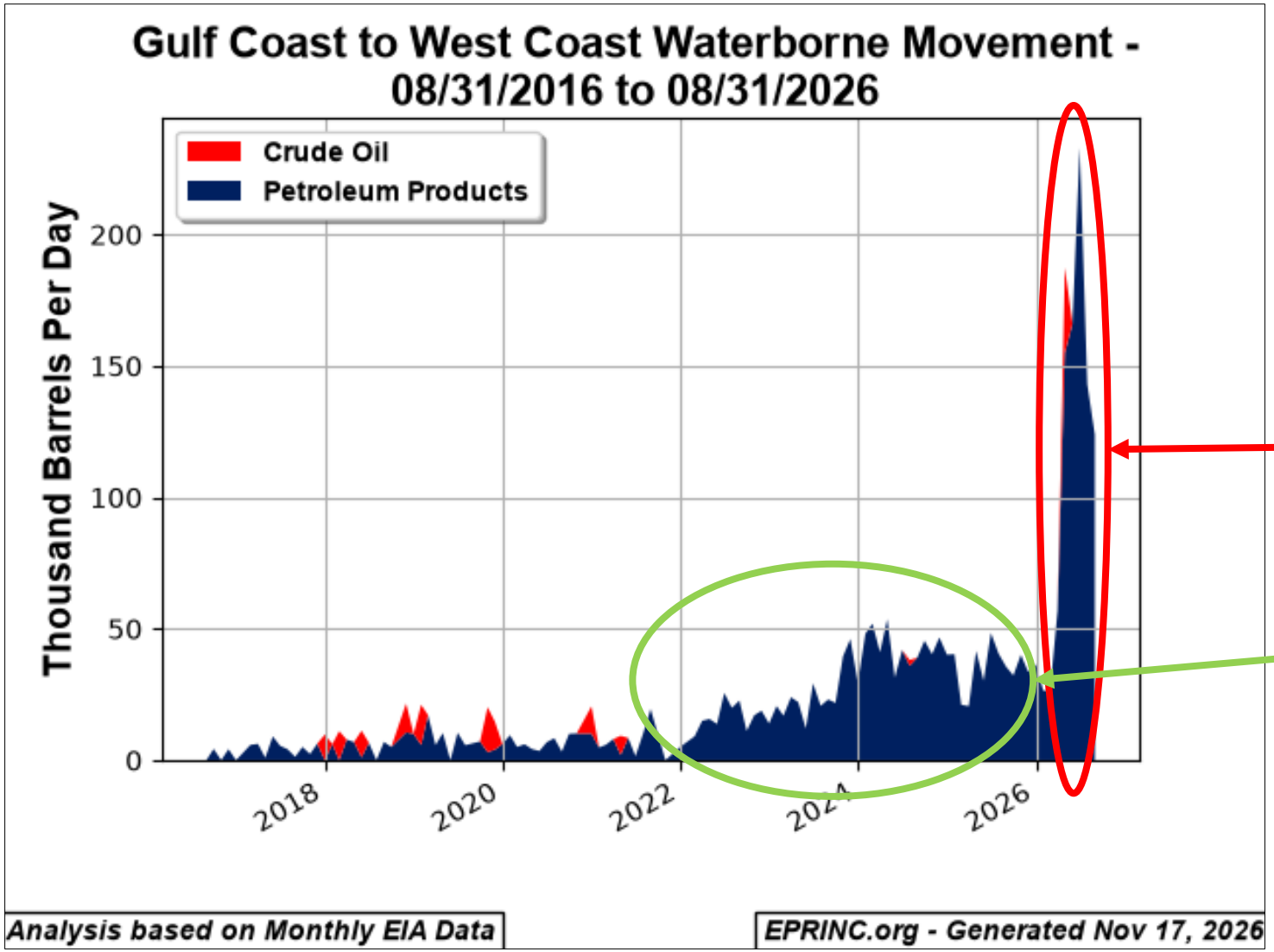
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The Impact of the March 2026 90-Day Jones Act Waiver and its Subsequent Extensions

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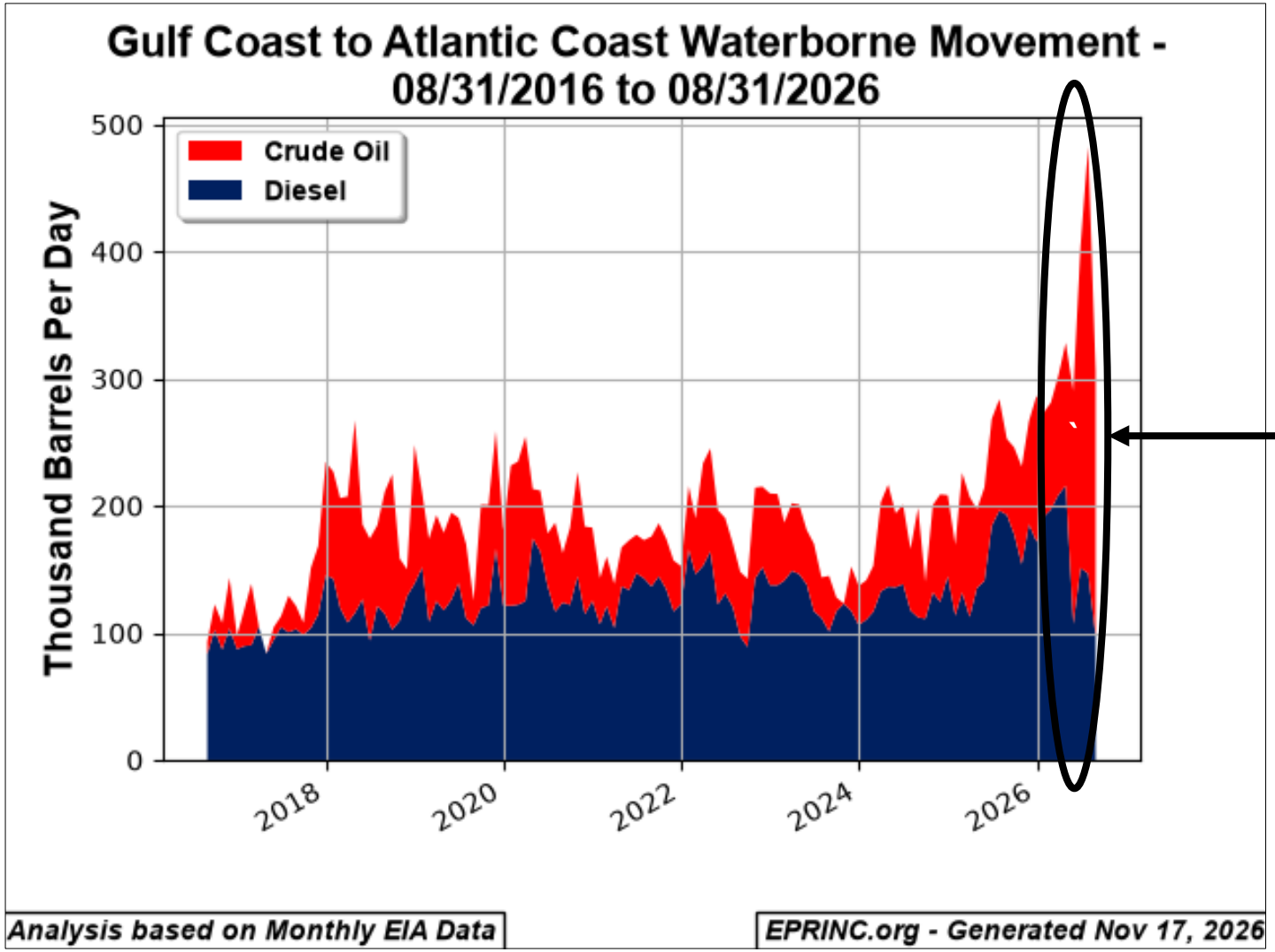
Due to temporary March 2026 Jones Act waiver and its extensions.

Due to California refinery closures/conversions.

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Increase crude oil shipments due to temporary March 2026 Jones Act waiver and its extensions.

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From March 2026 through the end August 2026, domestic waterborne crude oil and petroleum product flows have jumped from the U.S. Gulf Coast to both the East and West Coasts.

April-August 2026 receipts of Gulf Coast petroleum products into the West Coast, dominated by California, averaged 146 KB/d, almost 4.3 times the May 2025 to February 2026 average.

Similarly, crude oil flows into Mid-Atlantic refineries averaged 208 KB/d from April to August 2026 versus 80 KB/d during the prior period, or 2.6 times higher. This has been due to a series of temporary Jones Act waivers.

While attention was drawn to major national IT challenges during the latter part of the week, the Trump administration extended the Jones Act Waiver for a third time on Friday 13, 2026. Like the second extension, the duration is for 90 days through February 14, 2027 covering 237 categories of goods heavily focused on crude oil, petroleum products, petrochemical feedstocks, and fertilizers. In addition, each Jones Act-exempted voyage is subject to an extensive pre-authorization process.

This differs significantly from the prior waivers that expired in August 2026 that had a more expansive list of 600 categories of goods and less oversight and pre-authorization.

More detail can be found in EPRINC's first Jones Act Chart of the Week 2026-27 "Jones Act Waiver's Sea-Change In West Coast Fuel Receipts" published August 4, 2026.

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