A diesel export ban may sound like a way to lower fuel costs. In reality, it could actually raise gasoline prices.

Blocking diesel exports would eventually force refiners to cut fuel production overall, including gasoline, putting upward pressure on prices and increasing America's reliance on imported fuel.

Here’s why.

1. Diesel exports help keep gasoline flowing

Americans use more gasoline than diesel, but because both fuels are produced from the same barrel of oil, refineries can't make all the gasoline we need without also producing surplus diesel. Exporting that surplus diesel allows refineries to maximize gasoline production. Without exports, refiners can't simply stop making diesel and keep producing the same amount of gasoline.

2. A ban would force refinery cutbacks

A diesel export ban would strand roughly 1.5 million barrels per day of diesel that the U.S. market won’t use. As storage and pipelines fill, refiners would have to cut production.

According to S&P Global Energy, those cuts could reach 1.9 million barrels per day and reduce gasoline output by up to 750,000 barrels per day – roughly 12% of U.S. refining capacity or equivalent to the output of America's largest refinery.

3. America could become a net gasoline importer again

For more than a decade, the United States has benefited from being a major fuel exporter, reducing reliance on foreign energy and strengthening America's energy security. A diesel export ban could move us in the opposite direction. The same S&P analysis estimates the resulting refinery cutbacks could turn the United States into a net gasoline importer again by the end of 2026, making Americans more dependent on foreign supplies and overseas price shocks.

4. Less gasoline means higher prices

Here's where basic supply and demand comes into play: when refiners cut production because they have nowhere to send surplus diesel, they also produce less gasoline, putting upward pressure on gasoline prices.

Here’s what other smart people are saying:

> *“A run cut of that magnitude would have significant knock-on effects for other fuels, the analysis found. U.S. gasoline production could fall by as much as 750,000 b/d, flipping the US from a net exporter to a net importer of gasoline in the fourth quarter of 2026.”*

*— **William O'Neil, Brian Stetter and Debnil Chowdhury**, [S&P Global Energy CERA](), 9/22/2026*

"The price of gasoline could soar," Lipow said. "Do not ban diesel exports. You will have a whole rash of unintended consequences."

*— **Andy Lipow**, [CNN](), 9/22/26*

"'A diesel export ban could have the counterintuitive effect of an increase in gasoline prices if U.S. refiners cut runs,' analysts including Martijn Rats said in a Sept. 23 note. That's because barring overseas sales would prompt local storage tanks to fill up within weeks, forcing U.S. processors to pare activity, resulting in lower gasoline output and higher prices, according to the report."

*— **Martijn Rats, Morgan Stanley,** [Bloomberg](), 9/23/26*

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