

**HEDGEYE**

# DISCLAIMER

## DISCLAIMER

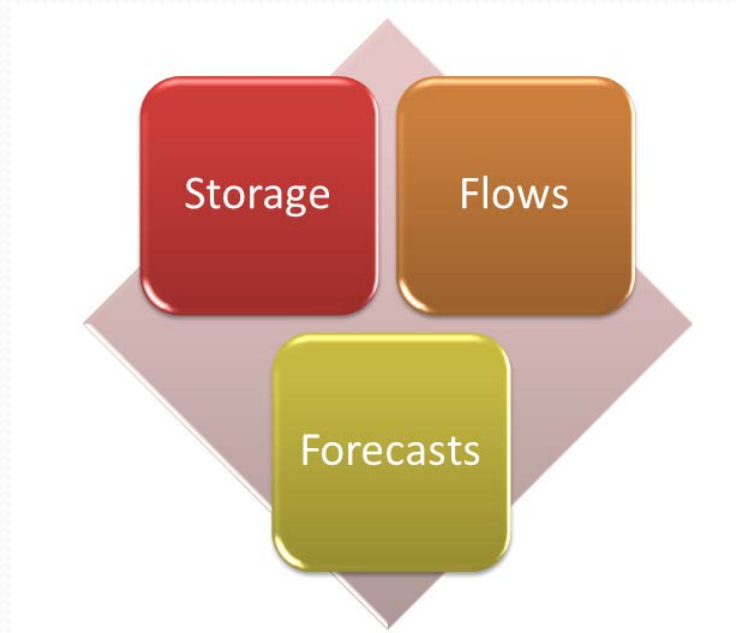
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TankerTrackers.com



*We Rock The Boat!*

# Our *Oil Painting*



While the oil industry refines metric tons, we refine a ton of metrics.

# Meet The Trackers!



**Samir Madani, Co-Founder**

IT / Telecom / Consumer Electronics

Sales & Marketing / R&D



**Lisa Ward, Co-Founder**

Banking

Trading & Finance



**Breki Tomasson, Chief Data Scientist**

IT / Telecom

Software Development & Training

# TankerTrackers.com

- Pro-Bono website (no revenue whatsoever) that keeps daily track of oil flows & inventories in key producer & consumer markets.
- Provide investors and traders a lot more insight into what's going on ahead of the reports.
- Calculate forecasts based on gathered data.
- Dispell rumors.

# @TankerTrackers & #OOTT

**TankerTrackers.com**  
@TankerTrackers

A pro-bono initiative perfecting the daily count of #oil barrels in storage and transit. #BigData #OSINT #EIAReport #OPEC #OOTT #Restore140

🌐 🇩🇪 🇬🇧

🔗 TankerTrackers.com

📅 Joined October 2016

🎂 Born on 21 December 1979

🖼️ 1,421 Photos and videos

Tweets **4,448** Following **3** Followers **10.5K** Likes **2,385** Lists **0** Moments **0** [Edit profile](#)

**Tweets** Tweets & replies Media

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**TankerTrackers.com** @TankerTrackers · Jul 26  
Here we are, friends! TankerTrackers.com is here to rock the boat! Meet the team: @BrekiT @Lisa\_Ward1990 @Samir\_Madani 🙌👏👏👏👏👏👏 #OOTT

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# TankerTrackers.com

## A crude website!

**TankerTrackers.com** 


We Rock The Boat!

EIA REPORTS GOV STATS ABOUT **Q&A**

### Welcome to TankerTrackers.com!

Did you know that roughly 2/3rd of the world's daily exported oil is transported by sea?  
**TankerTrackers.com** is the **WORLD'S ONLY FREE** website which keeps daily track of the amount of barrels of crude oil and refined product present in various spots & fleets of interest!


The advantage with TankerTrackers.com is that don't need to wait days, weeks or months before finding out how many barrels of oil have been moved around. Our website offers the latest data, and is updated daily! PLEASE NOTE that this website does **NOT** offer accuracy, but does provide viewers a general idea of weekly changes.

**NEW!** TankerTrackers.com User Manual to help you interpret our data! 

If you wish to donate, then please consider [organization](#) on our behalf. Thank you!

FLOATING STORAGES AND COMPANY FLEETS


HOT SPOTS



### #OOTT

John Knight Retweeted

**Javier Blas** @JavierBlas2  
In #oil, you don't see \$125 calls and \$85 puts changing hands often. Until this morning. #OOTT via @alexiongley1 [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/)

 **Barclays Oil Sale Triggers a Huge Number of Trades...**  
Barclays Plc sold the last part of its oil book to an unidentified buyer, triggering a surge in trading of exotic options written in the era of higher crude prices, according to [bloomberg.com](https://www.bloomberg.com)

Daddy JaydenEdler Retweeted

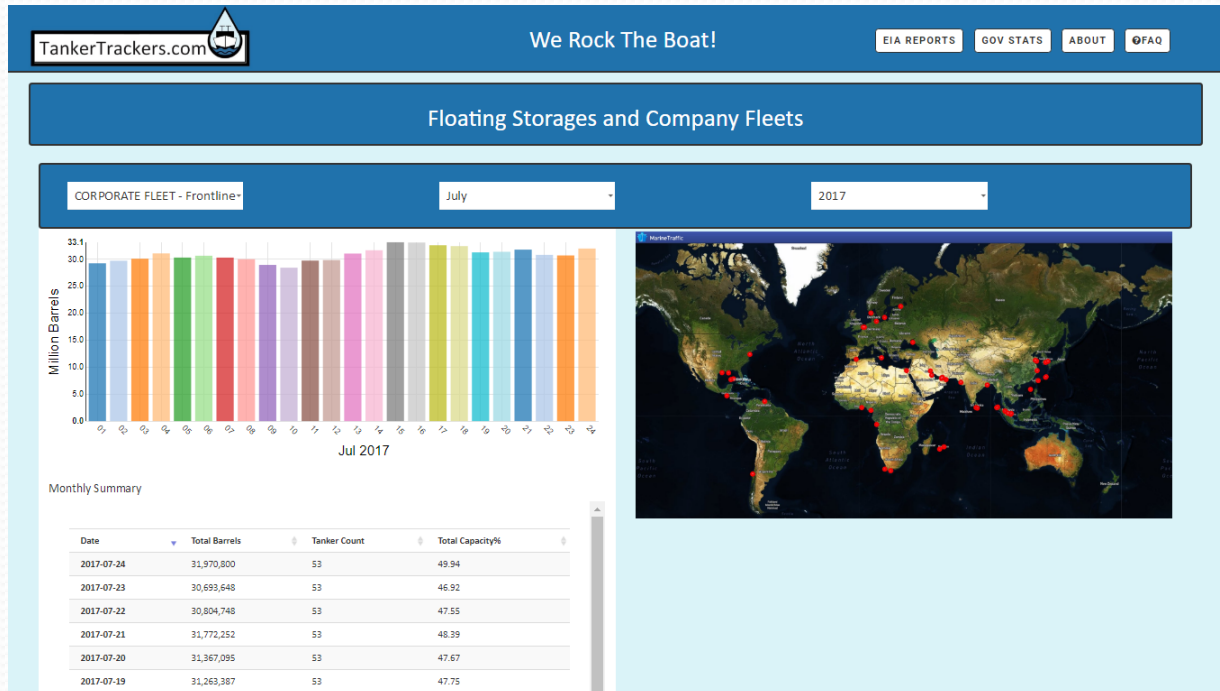
**Javier Blas** @JavierBlas2  
Here we go again: US large E&P #oil firm Anadarko cuts 2017 capex by \$300m (from \$4.5-\$4.7bn guidance) #OOTT #shale [investors.anadarko.com/2017-07-24-Ana...](https://www.investors.anadarko.com/2017-07-24-Ana...)

**"The current market conditions require**

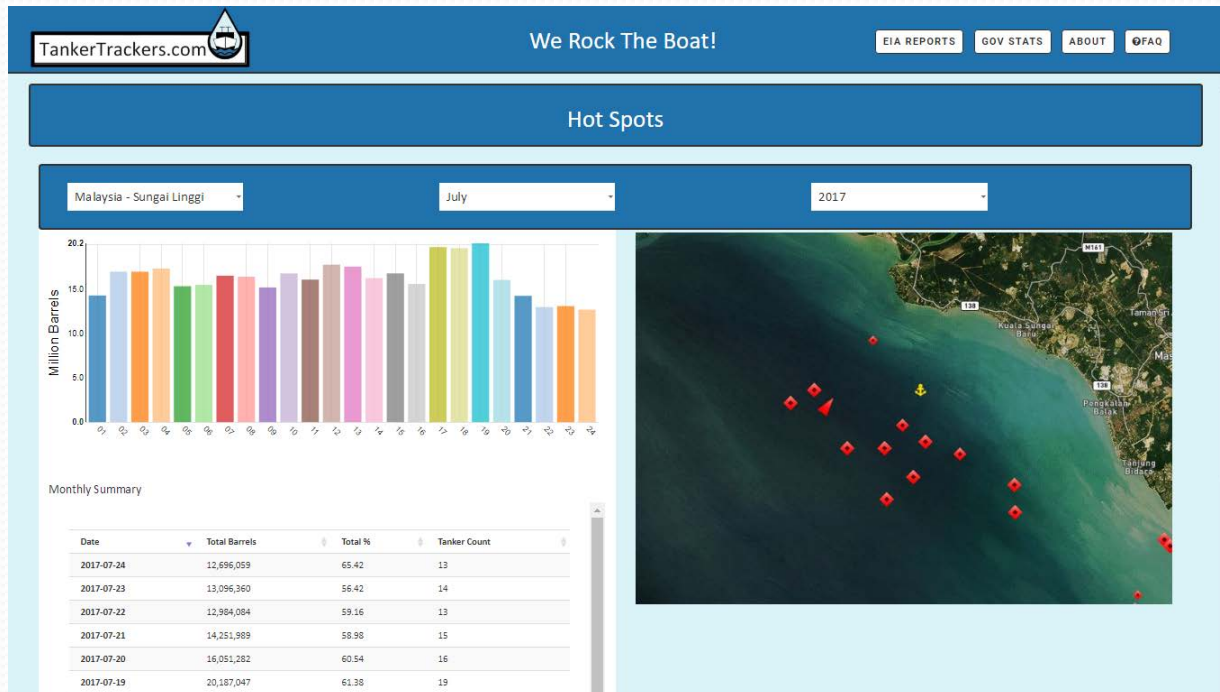
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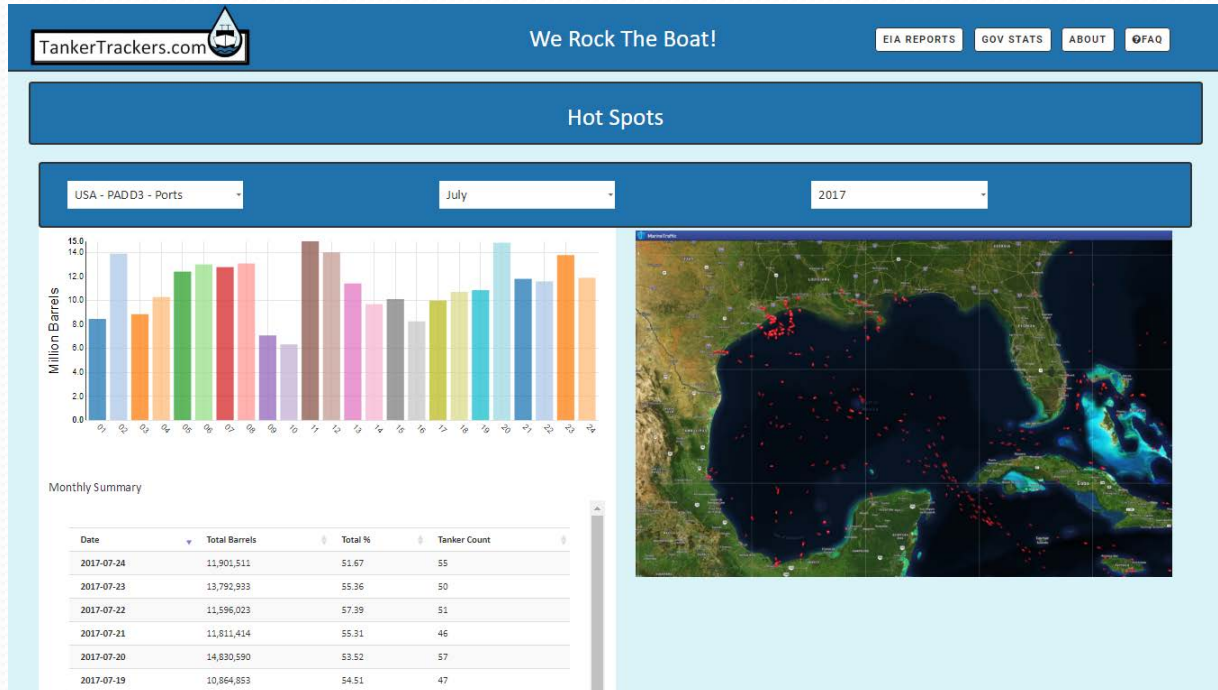
# Floating Storages



# Hot Spots (Ports)



# Hot Spots (PADDs: Ports & Anchorages)



# GovStats - Official Government Data

## TankerTrackers.com Official Government Statistics #OOTT

2017										
GOVERNMENT STATISTICS & DAILY BARRELS	PRODUCTION/DAY	IMPORTS/DAY	EXPORTS/DAY	REFINED/DAY	ADDED TO STORAGE 2017	ADD/REMOVED PER DAY	IMPORT BARREL PRICE	EXPORT BARREL PRICE	REVENUE (BILLIONS)	
CHINA	3,859,939	8,413,419	91,951	11,270,134	276,210,735	908,538	\$50.95			
INDIA	722,810	4,286,163		4,963,159	13,648,794	44,897	\$49.57			
IRAQ	4,505,444		3,808,556	543,444	4,318,000	17,770		\$46.81		
IRAN	3,878,778		2,179,857	1,708,429	-33,000	-90				
JAPAN		3,460,860		3,227,836	2,380,897	8,721	\$53.36			
KUWAIT	2,705,000		1,930,000	780,000		-4,561,000				
RUSSIA	10,985,987		5,191,949	5,576,148	65,985,393	217,057		\$48.34	\$60.74	
SAUDI ARABIA	9,943,222		6,963,444	2,546,778	-19,386,000	-71,011				
National 2017 Total Averages/Day	36,601,179	16,160,443	20,165,757	30,615,928	338,563,818	1,109,225	\$51.29			
2016										
GOVERNMENT STATISTICS & DAILY BARRELS	PRODUCTION/DAY	IMPORTS/DAY	EXPORTS/DAY	REFINED/DAY	ADDED TO STORAGE 2016	ADD/REMOVED PER DAY	IMPORT BARREL PRICE	EXPORT BARREL PRICE	REVENUE (BILLIONS)	
CHINA	3,993,998	7,627,479	75,912	10,881,900	242,541,250	662,681	\$41.28			
INDIA	732,500	4,306,770		4,924,782	41,439,168	113,222	\$39.21			
IRAQ	4,647,000		3,824,482	445,917	75,904,496	207,389		\$33.08	\$46.30	
IRAN	3,650,417		2,007,083	1,645,917	-920,000	-2,514		\$39.61	\$29.10	
JAPAN		3,312,084		3,261,818	11,688,398	31,935	\$41.85			
KUWAIT	2,708,417		1,955,167	765,500	-3,517,000	-9,609			\$42.90	\$30.70
RUSSIA	10,961,143		5,081,548	5,600,442	102,246,449	279,362		\$39.61	\$73.68	
SAUDI ARABIA	10,459,455		7,649,125	2,459,333	-36,777,900	-100,486		\$48.65	\$136.20	
National 2016 Total Averages/Day	37,152,929	15,246,333	20,593,316	29,985,610	432,604,861	1,181,380	\$40.78	\$40.77	\$315.98	

# China - Stocking Up!

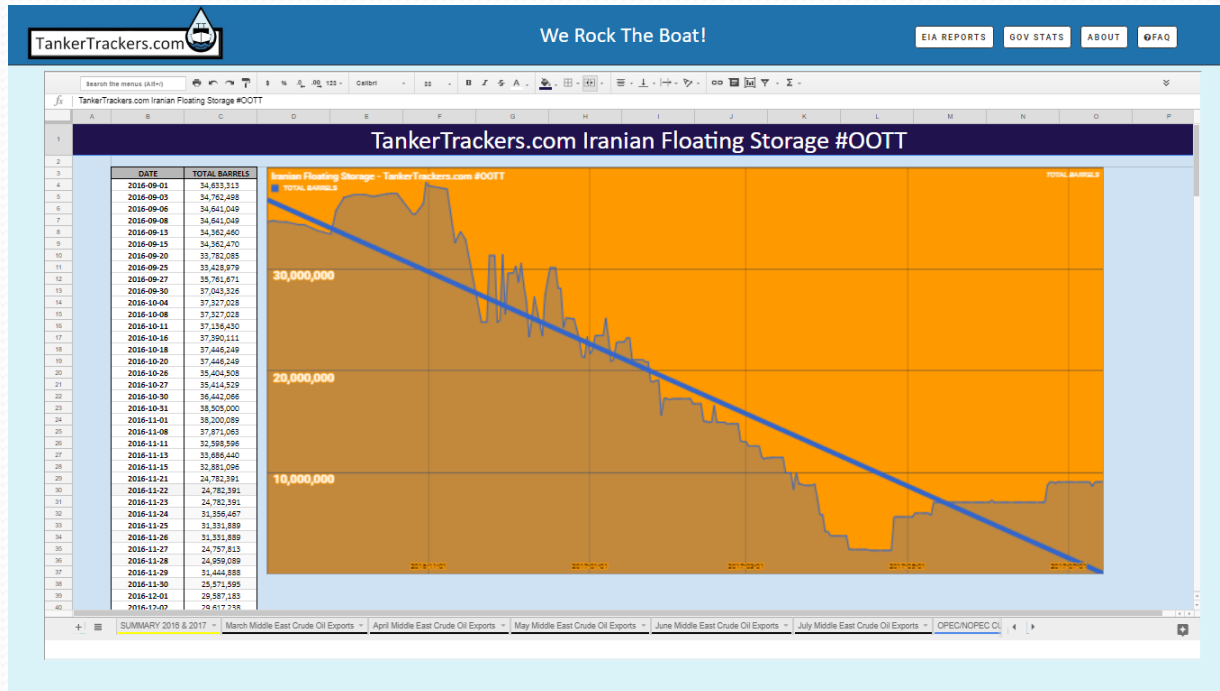
TankerTrackers.com Official China's Official Crude Oil Statistics #OOTT													
Using 7.322 barrels/ton													
Accumulated Storage Change Since Sept 2013	875,216,233 Barrels			479,308			Barrels Per Day						
<b>2017</b>													
Month	January	February	March	April	May	June	July	August	September	October	November	December	Storage Change
Monthly Imports (Millions of Metr	34.03	31.78	38.95	34.39	37.2	36.11	34.74	35.98	37.01	31.03			
Daily Imports	8,037,666	8,310,470	9,199,739	8,393,453	8,786,400	8,813,247	8,205,364	8,805,857	9,032,907	7,329,086			
Value	\$12,968,860,000	\$12,491,899,000	\$15,357,543,000	\$13,063,184,000		\$13,108,503,000	\$11,865,583,000	\$11,766,552,000	\$13,602,554,000	\$12,135,541,000			
10K Metric Tons (Produced)	1653.14	1602.25	1658	1599	1636	1623	1615	1596	1552.9	1603			
Daily Production	3,902,248	3,902,234	3,916,089	3,902,626	3,840,507	3,956,321	383145	3769649	3796111	3781499			
10K Metric Tons (Exported)	48	124	36	23	23	19	26	45	27				
Daily Exports	113,373	13,075	292,880	87,804	54,325	76,101	44,977	81,410	109,830	85,772			
Total Supply	11,625,542	12,599,829	12,822,248	12,008,235	12,572,563	12,692,467	11,996,532	11,754,095	12,713,189	11,046,772			
10K Metric Tons (Refined)	4768.7	4307.25	4750	4445	4652	4608	4712	4634	5051	5051			
Daily Refinery Runs	11,263,362	11,263,459	11,219,194	10,848,763	11,011,343	11,246,392	10,746,806	11,129,440	12,042,249	11,890,136			
Refining Utilization	74.59%	74.59%	74.30%	71.85%	72.02%	74.48%	71.17%	73.70%	79.75%	79.01%			
Spare Barrels	17,425,577	26,212,760	40,718,500	40,703,540	48,330,420	43,546,840	38,205,600	18,744,820	20,122,178	27,354,280			276,210,735
Avg Buy Price	\$52.05	\$53.04	\$53.85	\$51.88	\$49.54	\$48.54	\$46.05	\$47.29	\$50.20	\$53.41			\$50.59
WTI	\$52.81	\$54.01	\$50.60	\$49.33	\$48.32	\$46.28	\$50.17	\$47.23	\$51.67	\$54.38			\$50.59
Brent	\$55.70	\$55.59	\$52.83	\$51.73	\$50.31	\$47.92	\$52.65	\$52.38	\$57.74	\$61.37			\$50.59
Days	31	28	31	30	31	30	31	31	30	31	30	31	908,548
<b>2016</b>													
Month	January	February	March	April	May	June	July	August	September	October	November	December	Storage Change
Monthly Imports (Millions of Metr	26.69	31.8	32.63	32.48	32.92	31.62	31.07	32.85	33.06	28.79	32.39	36.38	
Daily Imports	6,924,606	8,024,802	7,922,222	7,933,602	7,918,850	7,623,321	7,334,924	7,928,998	8,004,814	6,800,612	7,892,507	8,502,721	
Value	\$7,526,209,000	\$7,373,263,000	\$7,711,843,000	\$8,705,697,000	\$9,401,429,000	\$9,836,361,000	\$10,612,173,000	\$10,714,236,000	\$10,513,215,000	\$9,400,850,000	\$11,215,136,000	\$12,297,887,000	
10K Metric Tons (Produced)	1705.5	1705.5	1737.3	1658.7	1687.1	1657.9	1672.3	1644.9	1597.5	1605.1	1608	1677	
10K Metric Tons (Exported)	4,024,241	4,206,093	4,103,301	4,005,324	3,949,821	4,005,301	3,949,803	3,825,348	3,896,503	3,701,343	3,724,502	3,950,968	
Daily Production	10	91	63	36	14	14	25	32	29	15	15	34	
10K Metric Tons (Exported)	23,819	229,799	146,802	63,457	0	34,169	59,048	51,963	104,949	68,496	46,373	80,306	
Total Supply	10,308,667	12,105,786	11,656,860	11,936,568	11,599,701	11,485,533	11,229,350	11,592,143	11,862,860	10,522,659	11,773,776	12,473,381	
10K Metric Tons (Refined)	4489.8	4588.1	4810.6	4479	4422.9	4507.5	4311.9	4421.6	4379.9	4705	4577	4762	
Daily Refinery Runs	10,604,618	11,371,137	10,620,107	10,848,604	10,848,604	11,021,905	10,708,025	10,457,706	10,489,476	11,112,906	11,179,831	11,294,775	
Spare Barrels	-9,174,466	15,478,708	32,560,934	30,437,354	35,746,004	14,226,848	16,284,128	35,167,566	35,189,532	-18,297,678	18,085,340	36,536,780	242,541,250
Avg Buy Price	\$36.51	\$31.67	\$32.30	\$36.49	\$33.83	\$33.87	\$46.05	\$44.54	\$43.43	\$44.70	\$47.35	\$46.17	\$41.38
WTI	\$33.62	\$33.75	\$38.34	\$45.92	\$49.10	\$48.33	\$41.60	\$44.70	\$48.24	\$46.86	\$48.44	\$53.72	\$33.72
Brent	\$34.74	\$35.87	\$39.60	\$48.13	\$49.69	\$49.69	\$42.46	\$47.04	\$49.06	\$48.30	\$50.47	\$56.82	\$36.82
Days	31	29	31	30	31	30	31	31	30	31	30	31	662,681

# Russia – Stocking Up?

TankerTrackers.com Official Russian Government Crude Oil Statistics (2013-onwards) #OOTT													
Calculated Accumulated Storage Change Since January 2013	<b>481,807,043</b>	<b>Total Barrels</b>		<b>272,978</b>	<b>Barrels Per Day</b>								
*****NOTES***** The GREEN rows show what oil production would look like if you remove the excess storage change from the stated daily production.													
<b>2017</b>													
Month	January	February	March	April	May	June	July	August	September	October	November	December	Accumulated Spare Barrels
Produced Tons	46991.7	42430.5	46732.5	45002.6	46315.9	44786.7	46309.6	46152.2	44640	46230	46330	46230	
Produced Barrels/Day	11811.845	11117.999	11849.899	10908.635	11571.879	10742.284	11523.963	11512.742	11079.940	11518.414	11518.414	11518.414	
Production Adjusted to Zero Stock Change	10,899,663	10,802,614	10,732,606	11,018,994	10,770,584	10,864,819	10,823,785	10,739,419	10,316,833	10,791,633	10,791,633	10,791,633	
Exported Tons	21960.4	19417.6	21841.2	22892.2	23143.5	20995.4	21389.2	21214	19975.2	22535.6	22535.6	22535.6	
Exported Barrels/Day	5,192,572	5,083,250	5,164,987	5,594,305	5,472,318	5,129,476	5,057,511	5,016,085	4,880,407	5,328,579	5,328,579	5,328,579	
Percentage Exported	46.8%	46.8%	46.7%	46.8%	46.8%	46.8%	46.8%	46.8%	46.8%	46.8%	46.8%	46.8%	
Refined Tons/Day	24,136.4	21,847.5	23,464.5	22,202.0	22,407.4	23,471.8	24,386.7	24,205.1	22,248.4	22,851.5	22,851.5	22,851.5	
Refinery Runs/Day	5,707,091	5,719,363	5,548,219	5,424,689	5,290,266	5,734,943	5,766,275	5,723,335	5,436,026	5,403,274	5,403,274	5,403,274	
Refinery Utilization	89.03%	89.23%	87.56%	84.63%	82.66%	83.47%	89.96%	89.29%	84.81%	84.23%	84.23%	84.23%	
Spare Barrels	6,559,612	11,548,312	10,418,444	2,003,744	6,607,450	2,141,815	8,912,811	8,372,623	17,132,213	6,314,457	6,314,457	6,314,457	65,985,393
WTI	\$52.81	\$54.01	\$50.60	\$49.33	\$48.78	\$46.28	\$50.17	\$47.23	\$51.67	\$51.67	\$51.67	\$51.67	
Brent	\$55.70	\$56.60	\$52.81	\$51.74	\$50.97	\$47.92	\$52.45	\$52.88	\$57.74	\$61.37	\$61.37	\$61.37	
Days	31	28	31	30	31	31	31	31	30	31	30	31	Barrels Per Day (YTD) 217,057
<b>2016</b>													
Month	January	February	March	April	May	June	July	August	September	October	November	December	Accumulated Spare Barrels
Produced Tons	46141.2	43133.8	46084.1	44219.9	45823.9	44377.946	45893.6	43092.2	45483.4	47493.6	45872.593	47398.9	
Produced Barrels/Day	10,910,141	10,902,440	10,896,660	10,821,888	10,835,608	10,843,011	10,851,618	10,713,433	11,113,111	11,229,938	11,206,204	11,207,546	
Production Adjusted to Zero Stock Change	10,506,312	10,545,594	10,618,845	10,727,844	10,475,208	10,718,062	10,632,662	10,465,320	10,640,964	10,850,264	10,991,410	11,095,266	
Exported Tons	20,820	19,988	21,824	22,389	22,047	20,615	20,768	19,426	21,088	22,313	21,084	21,212	
Exported Barrels/Day	4,946,568	5,052,063	5,160,967	5,470,452	5,211,623	5,046,821	4,910,533	4,959,356	5,152,501	5,279,874	5,151,515	5,014,493	
Percentage Exported	45.4%	46.3%	47.9%	50.0%	48.0%	46.8%	45.7%	45.7%	46.3%	45.6%	45.0%	43.7%	
Refined Tons/Day	23,522	21,774	23,084	21,518	22,555	23,353	24,200	24,797	22,476	23,675	23,901	25,322	
Refinery Runs/Day	5,561,744	5,503,543	5,458,178	5,257,491	5,262,183	5,681,240	5,722,120	5,863,172	5,491,563	5,574,370	5,839,904	5,989,792	
Refinery Utilization	86.77%	85.86%	85.15%	82.02%	82.09%	89.43%	89.27%	91.47%	85.67%	85.96%	91.11%	93.44%	
Spare Barrels	12,457,335	10,062,226	8,621,546	2,921,517	11,172,336	3,748,449	6,747,580	7,864,042	14,071,401	11,770,514	6,503,528	6,370,682	102,246,449
WTI	\$44.74	\$43.75	\$48.28	\$45.92	\$45.19	\$48.33	\$41.69	\$44.70	\$46.25	\$46.86	\$49.64	\$51.72	
Brent	\$44.74	\$43.97	\$48.60	\$48.13	\$49.69	\$49.68	\$42.86	\$47.04	\$48.06	\$48.30	\$48.67	\$46.81	
Days	31	29	31	30	31	30	31	31	30	31	30	31	Barrels Per Day (YTD) 279,362



# Floating Storages





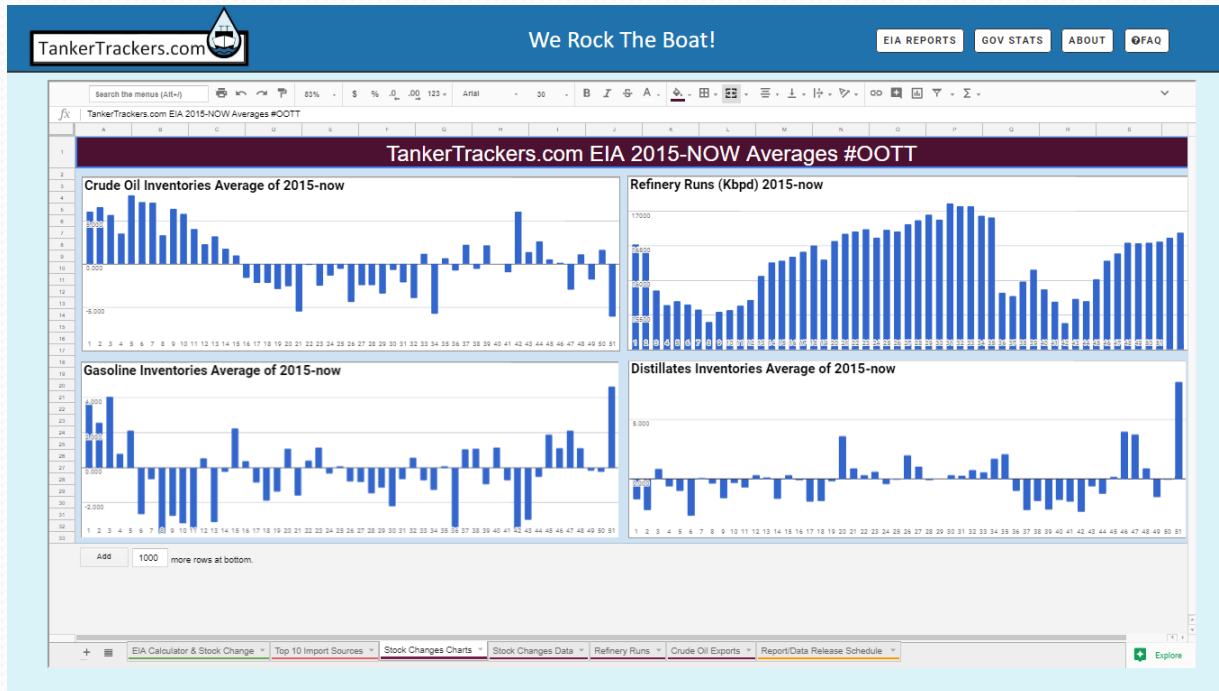
# EIA Forecasts & Stock Change

## TankerTrackers.com EIA Report Crude Oil Forecast & Stock Change #OOTT

TankerTrackers.com EIA Crude Oil Forecast Week Ending Nov 17	EIA Latest	SPR STOCK CHANGE DURING 2017		STORAGE CHANGE DURING 2017		EXPORTED NUMBER OF BARRELS IN 2017	
Daily Production	9,670,000	9,658,000	<b>-27,598,997</b>	<b>-21,816,998</b>	<b>297,080,001</b>		
Daily Imports	8,000,000	7,873,000					
Daily Exports	-1,900,000	-1,591,000					
Daily SPR Change (positive fig = sale)	257,142	246,000					
Daily EIA Adjustment	400,000	387,000					
Daily Net Available	16,427,142	16,573,000	YEAR-TO-DATE DAILY OIL PRODUCTION CHANGE	TOTAL COMMERCIAL OCCUPANCY	CUSHING OCCUPANCY	DAILY EXPORTED NUMBER OF BARRELS IN 2017	
Daily Refinery Runs	16,800,000	16,838,000	<b>888,000</b>	<b>61.22%</b>	<b>67.94%</b>	<b>922,609</b>	
WEEKLY STOCK CHANGE RESULT	<b>-2,610,006</b>	<b>-1,855,000</b>					
POST-CHANGE STOCKS & OCCUPANCY	456,439,994	457,195,000					

EIA Report Date	2017-09-15	2017-09-22	2017-09-29	2017-10-06	2017-10-13	2017-10-20	2017-10-27	2017-11-03	2017-11-10	2017-11-17	2017-11-24	2017-12-01	2017-12-08
Daily Production	9,510,000	9,547,000	9,561,000	9,480,000	8,406,000	9,507,000	9,553,000	9,620,000	9,645,000	9,658,000			
Daily Imports	7,368,000	7,427,000	7,214,000	7,617,000	7,483,000	8,123,000	7,571,000	7,377,000	7,898,000	7,873,000			
Daily Exports (Negative number)	-928,000	-1,491,000	-1,984,000	-1,270,000	-1,798,000	-1,924,000	-2,133,000	-869,000	-1,129,000	-1,591,000			
Strategic Petroleum Reserves (SPR)	230,000	316,000	136,000	171,000	198,000	46,000	313,000	97,000	101,000	246,000			
EIA Adjustment	-352,000	314,000	242,000	-133,000	421,000	396,000	563,000	399,000	389,000	387,000			
Net Available	15,828,000	15,911,000	15,169,000	15,865,000	16,620,000	16,147,000	15,667,000	16,624,000	16,904,000	16,573,000	0	0	0
Daily (Refinery) Inputs	15,172,000	16,174,000	16,029,000	16,258,000	15,439,000	16,025,000	16,015,000	16,305,000	16,639,000	16,838,000			
Actual Results With Adjustments	4,592,000	-1,841,000	-6,020,000	-2,751,000	-5,733,000	854,000	-2,436,000	2,233,000	1,855,000	1,855,000	0	0	0
Commercial Crude Oil Inventory	472,889,000	471,048,000	465,028,000	462,277,000	456,544,000	457,388,000	454,962,000	457,195,000	459,050,000	457,195,000	457,195,000	457,195,000	457,195,000
Storage Capacity Occupancy	63.32%	63.07%	62.26%	61.90%	61.13%	61.24%	60.92%	61.22%	61.46%	61.22%	61.22%	61.22%	61.22%

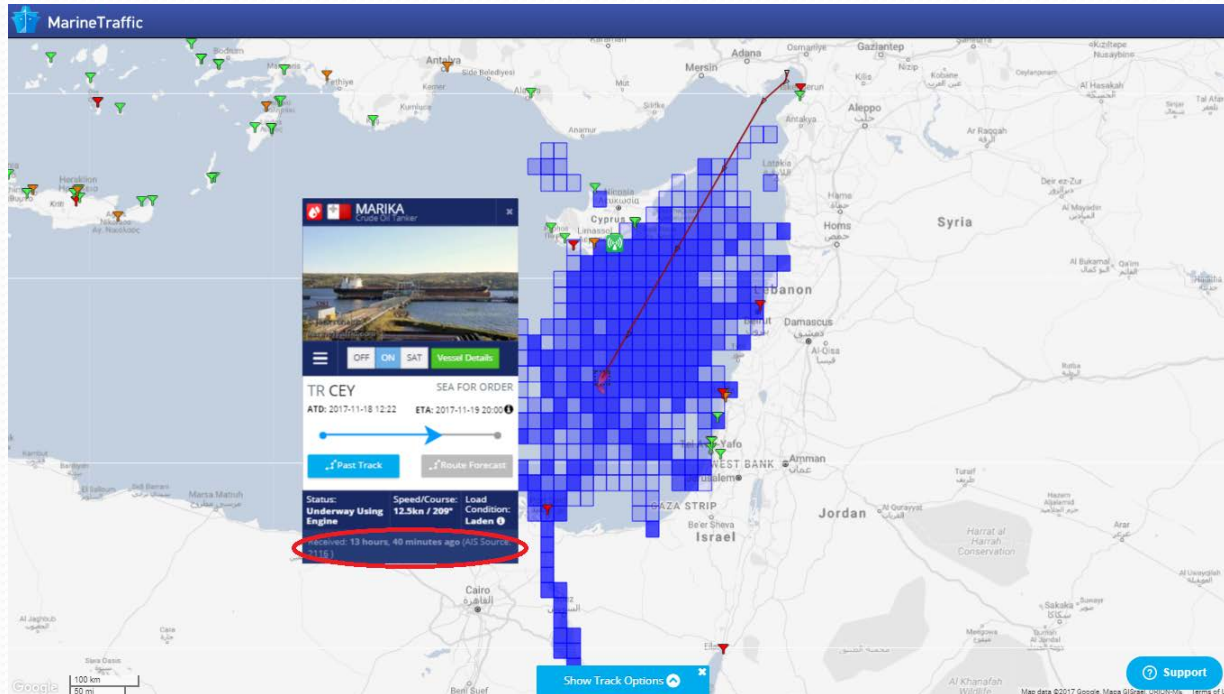
# EIA Recent History



# In-Depth Tracking: KRG

KRG EXPORTS SINCE 2017-09-25							
7.22	CURRENT TOTAL		DAYS SINCE START		Kbpd	START DATE	CURRENT DATE
DATE	IMO	VESSEL	BARRELS	DESTINATION	COUNTRY	BARRELS/DAY	MARKET SHARE
2017-09-25	9792228	Samsara	1,012,754	CROATIA	CROATIA	43,766	12.28%
2017-09-27	9292840	Valtamed	971,166	ISRAEL	CYPRUS	11,902	3.34%
2017-09-28	9232864	Mabrouk	1,025,074	ITALY	GREECE	119,361	33.48%
2017-09-29	9382762	Minerva Sophia	719,094	POLAND	ISRAEL	81,944	22.98%
2017-10-01	9249075	Marika	1,089,820	ISRAEL	ITALY	38,554	10.81%
2017-10-03	9600877	Tahiti	1,043,721	CROATIA	POLAND	27,178	7.62%
2017-10-04	9437983	Sn Olivia	627,954	GREECE	SPAIN	17,010	4.77%
2017-10-07	9332157	Minerva Georgia	1,019,003	GREECE	SUEZ CANAL	0	0.00%
2017-10-08	9436020	Crude Centurion	643,159	GREECE	UAE	16,797	4.71%
2017-10-11	9592290	Nissos Paros	737,922	CYPRUS	DAILY AVG.	356,512	100.00%
2017-10-13	9587207	Vinga	1,054,601	SPAIN			
2017-10-15	9232864	Mabrouk	965,935	POLAND			
2017-10-16	9332157	Minerva Georgia	1,032,590	GREECE			
2017-10-17	9746621	Poliegos	756,497	GREECE			
2017-10-20	9701566	Nissos Schinoussa	672,148	GREECE			
2017-10-25	9155808	Rise Glory	1,041,429	UAE			
2017-10-27	9437983	Sn Olivia	642,787	GREECE			
2017-10-31	9259680	Bls Ability	562,462	ITALY			
2017-11-01	9249075	Marika	913,824	ISRAEL			
2017-11-04	9746621	Poliegos	776,061	GREECE			
2017-11-08	9395329	Botafogo	672,139	GREECE			
2017-11-10	9259692	Bls Advance	558,028	GREECE			
2017-11-14	9292840	Valtamed	1,029,436	ISRAEL			
2017-11-17	9249075	Marika	1,076,282	ISRAEL			
2017-11-20	9777931	Ryman	657,028	CROATIA			
2017-11-23	9592264	Nissos Serifos	802,838	ITALY			

# KRG: Clandestine Transactions



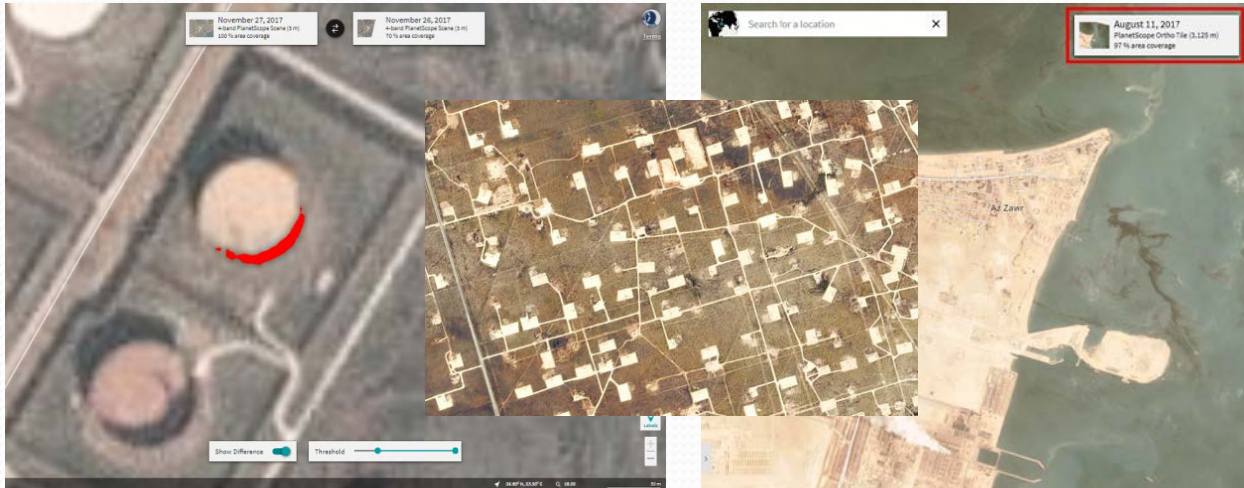
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- Broadest AIS network worldwide
- Massive vessel database
- Maritime transparency



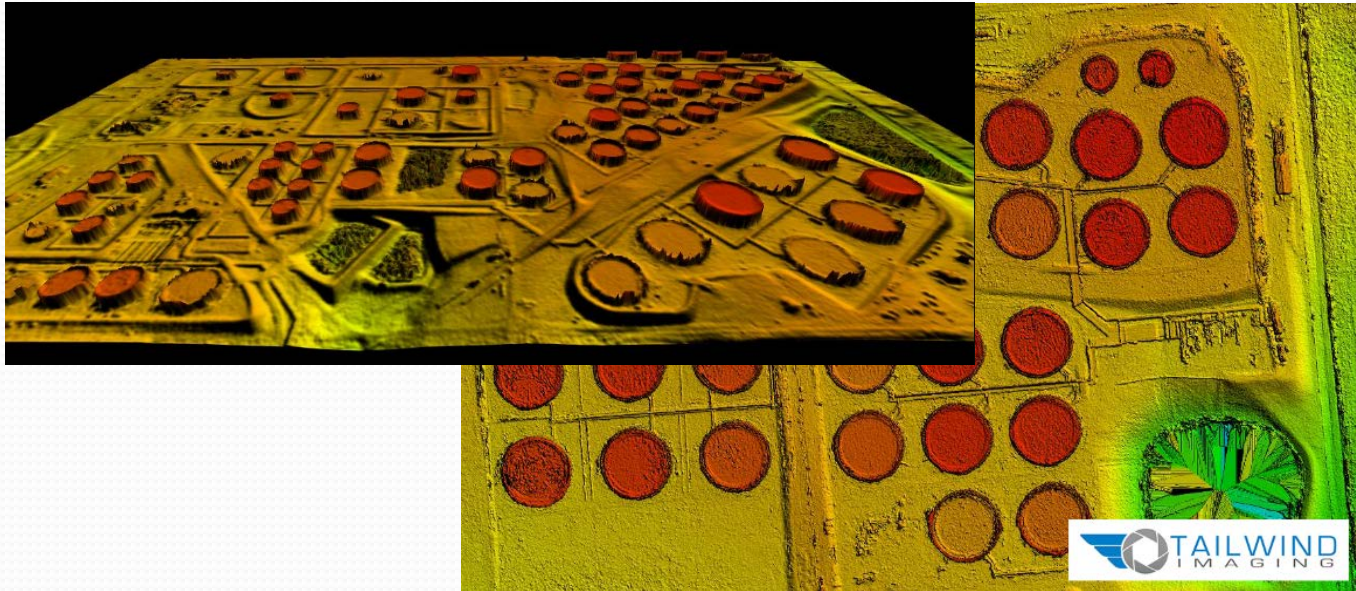
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- Spot daily changes in inventory as well as new oil well pads.
- Investigate ongoing events.
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# *Tailwind Imaging* – Storage Flyovers

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**Inside Look: The Newest, Effective, Free Tool For Oil Traders**

By Ellen R. Wald, Ph.D. | Commodities | Feb 01, 2017 08:02AM ET

One of the key data points gaining popularity among successful oil traders is the question of where the commodity is, or is heading. And one of the best ways to follow the movement of oil is to track tanker information.

Several businesses, some covered here this past summer, provide such data for a subscription fee. However, a community of traders has come together over the course of the past year to discuss oil trading and share data without boundaries or firewalls. Their newest contribution to this effort is a website offering free data on the movement of oil.

TankerTrackers.com touts itself as "the world's only free website which keeps daily track of the amount of barrels of crude oil and refined product present in various spots and fleets of interest." Led

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By Irina Slav • Nov 22, 2017, 11:00 AM CST



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by Leslie Hayward and Matt Piotrowski | June 29, 2016



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Chinese oil imports have been propping up global crude prices © FT montage; Reuters



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- A completely brand new TankerTrackers.com!
- Automated tracking (Crude, Products & Gas)
- OPEC & US exports
- Semi-automated forecasts

Thank You!

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