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## Out of the predictions market

BY: **KELSEY TAMBORRINO** | 04/23/2026 05:45 AM EDT

*With help from Pavan Acharya, Rachel Shin and Amelia Davidson*

### QUICK FIX

- **Members of President Donald Trump's Cabinet appeared before lawmakers this week** and sought to play down their earlier comments on gasoline prices.
- **Facing apparent GOP opposition to the bill**, the House abruptly shelved legislation that would overhaul the Endangered Species Act.
- **Bipartisan lawmakers offered a proposal to the House farm bill** to permanently allow nationwide, year-round sales of fuel that uses a blend of 15 percent ethanol.

**GOOD MORNING! IT'S THURSDAY.** I'm your host, Kelsey Tamborrino. Khary Cauthen of Cheniere is once again our trivia winner for knowing John Carpenter was the first-ever million-dollar winner on "Who Wants to Be a Millionaire?"

For today: Which U.S. president was the first to bring pet cats into the White House? Send your tips and trivia answers to me at [ktamborrino@politico.com](mailto:ktamborrino@politico.com). You can follow me at [@kelseytam](https://twitter.com/kelseytam) or on Signal at [kelseytam.90](https://signal.com/kelseytam.90).

## DRIVING THE DAY

**UNCERTAIN TIMES:** Several Trump administration officials made the rounds on Capitol Hill on Wednesday, where they quickly made clear they are done making predictions about when the war with Iran will end and energy markets will return to normal, [as James Bikales, your ME host and Aiden Reiter report.](#)

It marked a shift in the confident rhetoric from previous public appearances made by officials after Trump launched the strikes in the Middle East. At the time, Trump administration officials and the president himself predicted the war would likely end in a matter of weeks, with energy [prices to fall soon after.](#)

Since then, Trump allies have reworked their timelines amid changing dynamics in the region. Energy Secretary Chris Wright [earned a rebuke from President Donald Trump](#) over the weekend when he [told CNN](#) that sub-\$3 gas “might not happen until next year.”

On Wednesday, [Wright told appropriators](#) he “never said gas prices wouldn’t go down until next year.”

“There was a thing on the news that I said they might not be below \$3 a gallon — I didn’t know when,” Wright said. “I left some uncertainty in there. But I also share your desire for lower gasoline prices. I’m with you.”



Energy Secretary Chris Wright testifies before the Senate Appropriations Subcommittee on Energy and Water Development on Capitol Hill, on April 22, 2026. | Francis Chung/POLITICO

The uncertainty over a specific timeline for when consumers might see relief was echoed by others on the Hill. “I think the conflict will end, and I think gasoline prices will come back to where they were, or perhaps lower,” Treasury Secretary Scott Bessent told Senate appropriators.

But Bessent didn't say Wednesday when the price of gasoline — still averaging above \$4 per gallon even after a week of declines — will come down. Instead, he said that it depended on the length of the war. “That is path dependent on when the war and the conflict end,” he said.

Republicans were quick to acknowledge that tricky dynamics of committing to a firm timeline. “I don't know when the price of gas is going to come down either,” Senate Appropriations Energy-Water Subcommittee Chair [John Kennedy](#) (R-La.) told Wright. “If I did, I'd go play that thing called the polymarket,” adding he thought the conflict is “pretty close to being done.”

“When the conflict ends, the price of gas will come down,” Kennedy said. “I don't know how fast.”

Democrats, meanwhile, are keeping affordability front of mind. Senate Democrats are [planning to use a marathon voting session this week](#) to hammer Republicans on several cost-of-living issues.

**The comments also come as a drop in gasoline inventories** pushed up U.S. gasoline futures to their highest level in nearly four years, briefly touching \$3.37 a gallon for the May wholesale price — a signal that retail prices at the pump aren't likely to see any relief soon.

Gasoline inventories were down by 4.6 million barrels and were 0.5 percent below the five-year average, according to new [data by the U.S. Energy Information Administration](#). Gasoline demand held near 9.1 million barrels a day and analysts had forecast that gasoline stocks would slip a more modest 1.4 million barrels, [as The Wall Street Journal reported](#).

#### ON THE HILL

**WHAT'S NEXT FOR ESA?** The fate of House Natural Resources Chair [Bruce Westerman](#)'s overhaul of the Endangered Species Act is in limbo after House Republican leaders on Wednesday pulled the “ESA Amendments Act of 2025,” [H.R. 1897 \(119\)](#), Jennifer Yachnin, Kelsey Brugger, Timothy Cama and Andy Picon report.

House Speaker [Mike Johnson](#) said Wednesday evening that he pulled the bill from consideration at the request of “a few subset of members.” Westerman added that he

expects his bill will return to the floor in the coming weeks.

Florida Republican Rep. [Kat Cammack](#) said that she was concerned about the bill's language expanding the use of the Endangered Species Committee, also known as the "God squad," a group of high-level officials that can exempt projects from ESA mandates.

Rep. [Anna Paulina Luna](#) (R-Fla.) had posted to X.com [an apparent criticism](#) of the legislation prior to Wednesday, but Pennsylvania Rep. [Brian Fitzpatrick](#), Florida Rep. [Maria Elvira Salazar](#) and New York Rep. [Andrew Garbarino](#) were also unhappy, according to people familiar.

The House on Wednesday did pass two other notable bills, including [H.R. 6387 \(119\)](#) — or the Fire Improvement and Reforming Exceptional Events (FIRE) Act — from Rep. [Gabe Evans](#) (R-Colo.). That bill, which now heads to the Senate, would make sure that emissions from "prescribed burns" may not count against an area's compliance status with National Ambient Air Quality Standards.

The lower chamber also approved "Reliable Federal Infrastructure Act," [H.R. 4690 \(119\)](#), from Rep. [Nick Langworthy](#) (R-N.Y.), which [would roll back](#) several energy-efficiency mandates for new and renovated federal buildings.

**ME FIRST — UNDER A ROCK:** Sens. [Catherine Cortez Masto](#) (D-Nev.) and [Jim Risch](#) (R-Idaho) are introducing legislation today meant to speed up permitting for geothermal projects. The "[Geothermal Ombudsman for National Deployment and Optimal Reviews Act](#)" would create a central coordinating office in the Interior Department focused on geothermal.

"This needed fix will help states across the country harness untapped geothermal potential," Cortez Masto said in a statement.

A version of the bill from Colorado Republican Rep. [Jeff Hurd](#), [H.R. 5631 \(119\)](#), is already moving in the House. The measure sailed through the Natural Resources Committee by voice vote. The House Natural Resources Committee has kept a focus on the renewable energy source, most recently [advancing a bill](#) this week to require yearly lease sales for geothermal energy on federal land.

**The House is poised to vote on a more controversial geothermal bill as soon as today.** The "Harnessing Energy at Thermal Sources (HEATS) Act," [H.R. 5587 \(119\)](#), from Reps. [Young Kim](#) (R-Calif.) and [Adam Gray](#) (D-Calif.), would keep some geothermal projects on state and private land from requiring federal drilling permits.

**THE HEAT OF THE MOMENT:** Interior Secretary Doug Burgum on Wednesday backed efforts by lawmakers to enact comprehensive permitting reform, despite actions

by agencies within his department that have stalled those negotiations, [Ian M. Stevenson reports](#).

"It's absolutely essential that this permitting bill goes forward," Burgum said during a Senate Appropriations hearing on the Interior Department's budget request.

In response to questioning from Environment and Public Works Chair [Shelley Moore Capito](#) (R-W.Va.), Burgum backed changes to laws like the National Environmental Policy Act and Endangered Species Act, which he said are necessary to stop their "weaponization" and to return to Congress' original intent.

"This is the moment," Burgum said, adding that he was willing to pitch in "anything we can do to help Congress get the permitting bill over the line."

**Related:** [Burgum gets heat over offshore agency reorganization](#)

**FOR YOUR RADAR:** The Senate Environment and Public Works Committee [announced](#) EPA Administrator Lee Zeldin will appear for a hearing next week to examine the agency's proposed budget for fiscal 2027.

**E15 RETURNS:** Rep. [Michelle Fischbach](#) (R-Minn.) introduced a bipartisan [amendment](#) to the farm bill, [H.R. 7567 \(119\)](#), with twenty other members — including Reps. [Randy Feenstra](#) (R-Iowa) and [Stephanie Bice](#) (R-Okla.), the co-chairs of the House Rural Domestic Energy Council tasked with creating a solution on ethanol — to allow nationwide, year-round sales for E15.

The amendment proposes a limit on exemptions from the Renewable Fuel Standard by defining "small refining companies" as those that processed fewer than 75,000 barrels per day across all facilities in 2025. And it would also allow for refineries to seek exemptions beginning in 2028 if they are at risk of closure, permanent idling or conversion to a renewable fuel production facility.

Agriculture Committee leadership has said ethanol sales are not within the committee's jurisdiction. House Agriculture Chair [G.T. Thompson](#) (R-Pa.) told POLITICO's Rachel Shin that while he does not have the authority to put a year-round E15 provision in the farm bill, it would be possible if House leadership allows it.

"I wouldn't be opposed. I'm supportive of year-round E15," Thompson said Wednesday. "That's jurisdiction of Energy and Commerce. Now that all can be waived, but that's a leadership question."

**Biofuel supporters, meanwhile, said the proposal struck the right balance.**

"With the summer driving season approaching fast, this amendment represents a critical opportunity to unleash investment in rural communities and shield U.S. consumers from

volatility with lower-cost, American-made fuel,” said Emily Skor, the CEO of Growth Energy.

The **Fueling American** Jobs Coalition, which represents U.S. independent oil refiners, said in a statement earlier on Wednesday that efforts to “force unchecked E-15 expansion, without needed reforms to lower and prevent continuous increases in ethanol mandates, through yet another must-pass piece of legislation” would be counter to lawmakers’ promises on a responsible path forward. FAJC said it opposed efforts to include E15 in the farm bill and called on lawmakers “to take a stand for the independent refinery workers, consumers, and communities they represent.”

**FLYING IN:** Roughly 1,500 electric cooperative leaders will be in town next week for the National Rural Electric Cooperative Association’s annual fly-in, ME is told.

The co-ops — who will be in D.C. from April 26-29 — are expected to engage with lawmakers and agency officials on reforms in federal permitting, modernizing FEMA, strengthening wildfire mitigation policies through the Fix Our Forests Act, [H.R. 471 \(119\)](#), and expanding USDA’s Rural Utilities Service Electric Loan Program.

#### AT THE AGENCIES

**CHUGGING ALONG:** The Nuclear Regulatory Commission’s leaders are feeling bullish about the agency’s efforts to [meet the requirements](#) laid out in Trump’s executive order last year to overhaul its functions. Commissioner Bradley Crowell, a Biden administration appointee, told members of the House Energy and Commerce Committee’s energy panel on Wednesday that “we are on track to finish by the timeline set in the executive order by late this year.”

NRC Chair Ho Nieh similarly said that he expects provisions from the “Reforming and Modernizing the NRC’s Regulations” section of the order to be in “final form” by the end of the year.

Nieh also pushed back on claims from Democrats and nuclear safety advocates that recent moves at the agency have compromised the independence of the nation’s chief nuclear energy regulator, [as Nico Portuondo reports](#).

“Do you believe that Trump’s attacks on the NRC’s independence and staffing cuts undermine public confidence in the NRC and the safety of nuclear energy?” Rep. [Rob Menendez](#) (D-N.J.) asked all five commissioners.

Nieh said he does not believe the agency is under attack. His fellow Republican commissioners agreed, with David Wright calling it a “trick question” and Douglas Weaver saying he had not seen any attacks during his short tenure.

## WORLD VIEW

**RAKING IT IN ON SOLAR:** China is selling lots of solar — and the world has been more eager to buy it since the onset of the U.S.-Israel war with Iran, [new data released by](#) energy think tank Ember shows.

According to Ember, China exported a record 68 gigawatts worth of solar panels, cells and wafers in March, higher than the previous top mark set last August by about 50 percent. Fifty countries across the globe also set all-time records for solar imports from China that month as well, Ember said, including India, Australia and the United States.

“The latest data shows that the regions most affected by the unfolding energy crisis have seen some of the sharpest increases in demand for solar PV,” Ember wrote in a news release.

The report comes as disruptions to global markets since the start of the war [have driven many countries](#) dependent on oil from the Middle East to consider other energy sources to meet their electricity needs.

## MOVERS AND SHAKERS

— **Michael Abboud** and **Molly Vaseliou**, two veteran officials from the first Trump administration, have left EPA’s Office of External Affairs, [per Kevin Bogardus](#). Abboud joined the Agriculture Department last month as deputy chief of staff for public affairs and Vaseliou’s automatic reply said she was no longer with EPA as of April 10.

## THE GRID

— [“Supreme Court blocks Enbridge from slow-walking Line 5 dispute,”](#) via E&E News

— [“Druzhba pipeline restarts Russian oil flows to Europe, unblocking EU loan for Kyiv,”](#) via Reuters

— [“Tesla South Texas refinery wastewater found to contain toxic metals,”](#) via USA Today

— [“USA Rare Earth CEO says U.S. is in ‘early innings’ of independence,”](#) via Bloomberg

— [“Trump praises decision to keep 2 Pennsylvania coal plants open: ‘Big win,’”](#) via The Hill

## ON THE CALENDAR

## THURSDAY

**9 a.m.** — The Energy Department [holds a meeting](#) of the Defense Production Act Consortium to provide updates to the public on the progress of the Consortium and provide commentary on approved Plans of Action.

**10 a.m.** — The Groundwire Group and E3G [hold a discussion](#) on "Macro Meets Micro 2026: What State-Level Numbers and Narratives Tell the World About U.S. Climate Action."

**2 p.m.** — The Business Council for Sustainable Energy [holds a discussion](#) on "Understanding an Evolving Energy Marketplace: Top Findings of the 2026 Sustainable Energy in America Factbook."

**4 p.m.** — The Environmental and Energy Study Institute [holds a briefing](#) on "Tracking Down Data — Where to Find Climate and Environmental Information in 2026."

**4 p.m.** — The Carnegie Endowment for International Peace [holds a discussion](#) on "The Future of Climate-Health Policy: Lessons from the U.S. Experience."

**4 p.m.** — United in Sustainability Network [holds a discussion](#) on "From Risk to Resilience: How Financial Cooperatives are Navigating Climate."

**THAT'S ALL FOR ME!**

***CORRECTION:*** A previous version of Morning Energy misspelled Molly Vaseliou's name.

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