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Faith, hope and clarity

As we enter 2013 what would the industry wish for? With reports imminent on retail price transparency, oil market competition and refining security in the UK – fair and positive outcomes are to be desired.

In an evolving energy world, it is important not to lose our **faith** in oil. The Coryton refinery may be no more but the site soon reopens as the Thames Oil Port providing the south east with another terminal. In the north west, Valero is reopening the Manchester Fuels terminal (see pages 16/17) and Essar is making investments at Stanlow. Having faith in oil led WCF Fuels to acquire Chandlers at the end of November.

This may be a mature market but it is tried, tested and largely trusted. Retaining **hope** for the future is vital as oil continues to hold the proven line for our energy security. Oil's presence not only gives new energies time to emerge, it will still be around until they flourish.

'Oil will continue to be the most widely used fuel' says Exxon Mobil's latest Outlook for Energy. In 2040 energy demand will be 35% higher than it was in 2010 – the extra demand being largely created by the 1.3 billion people in the world who still have no access to electricity.

In the world of UK renewables, the big hope for 2013 is the domestic Renewable Heat Incentive. The first scheme of its kind worldwide, but will it be enough to tempt cash-strapped customers looking for tidings of comfort and joy? (See page 15)

And finally there's **clarity** – often highlighted as a key reason for the slow progress of renewable energy to date. Faith, hope and clarity – the greatest of these is clarity – in our energy future, the sender of the clearest message is likely to emerge as the strongest contender.

Fuel Oil News

The monthly magazine for the fuel distribution, storage and marketing industry in the UK and Ireland.

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Annual subscription for the UK & Republic of Ireland is priced at £92 or €109 inc. p&p. Overseas: £109 or €129. Back issues: £8 per copy.

Credit card payments
01565 653283

Founded in 1977 by James Smith

Published by
Ashley & Dumville Publishing Ltd,
Caledonian House, Tatton Street,
Knutsford, Cheshire
WA16 6AG

AD
PUBLISHING



Fuel Oil News
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2013

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Manchester Central
17 Oct 2012

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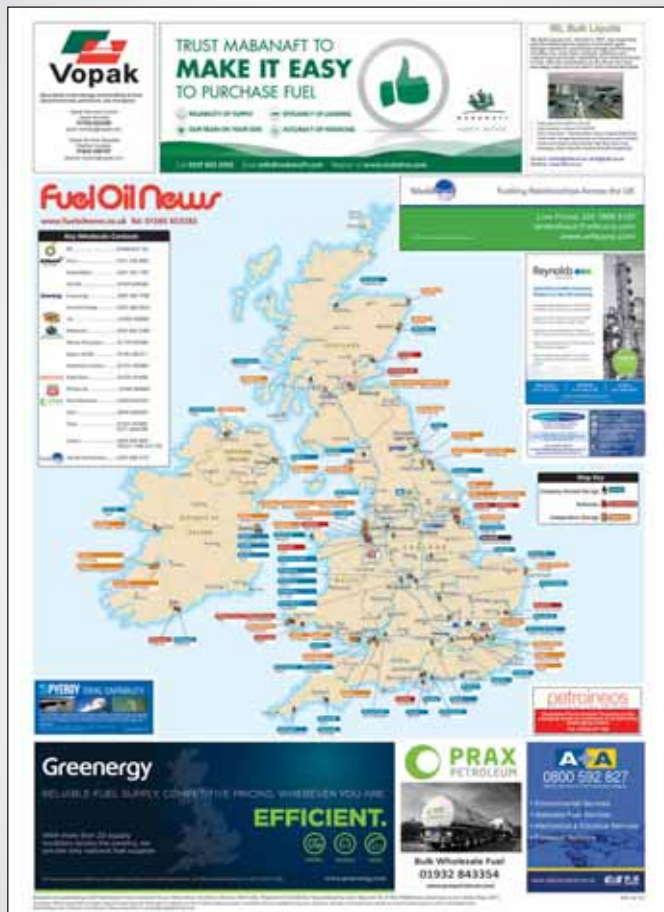
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On the map



Your 2013 storage & terminals wall map is FREE with this issue. For additional copies, please call 01565 653283.

Downstream at IP Week 2013



Changes in global demand for oil and crude products are impacting all aspects of the downstream value chain including refining, trade, infrastructure and logistics. On Wednesday 20th February, a special IP Week conference will discuss the outlook, the challenges and the opportunities for the downstream industry. Chris Hunt, UKPIA's director general will be among the speakers. Questions being asked include:

- How can we make profit in the downstream sector?
- What is the refining outlook to 2030?
- Is there room for a European domestic refining sector?
- Can process safety be better aligned?
- Dieselisation: who has the competitive advantage?
- Clean fuels: what is their impact?

Register to attend at www.energyinst.org/ip-week

Tanker building success

Morrow Fuels is so proud of its new tankers that the Lisburn-based distributor nominated not one, but two vehicles for the title of Fuel Oil News tanker of the year 2012.

Built by sister company, Morrow Tanker Services, the first of the two tankers is a 12 tonne DAF LF 45-220 with an automatic gearbox and a 7500 litre three compartment Central Welding barrel. Interestingly it is believed to be the first DAF LF 45 with an automatic gearbox, to be used as a tanker.

The second, an Eastside Fuels tanker – is an 18 tonne DAF LF55 250 and is the first that Morrow Tanker Services has built using a Tasca Tankers aluminium barrel. The company has just entered into a supply agreement with Tasca Tankers. "This is the first of hopefully many aluminium barrels that we will use as they offer far superior payloads and life span over mild steel," explains Jonny Morrow. Morrow Fuels recently acquired Eastside Fuels and quickly set about updating its aged fleet.

Both tankers are well-equipped with Emco Wheaton lids and bottom loading systems, Mouvex CC850 pumps, Alpeco TE550 control boxes and metering systems and Collins Youldon hose reels. Additionally both vehicles feature a remote control PTO system developed by Morrow Tankers, in conjunction with Alpeco.

As well as building its own tankers, Morrow also manufactures tankers for other distributors and has just started to break into the southern Irish market, with sales to Eire making up nearly 30% of the company's turnover. In the last year alone the company has completed 16 tankers for other fuel oil distributors including Hayes Fuels, Thompson Fuels, AH Fuels, Robinson Fuels, Roy Kennedy Fuels, Tom Young Fuels, Bloomfield Fuels, Murdock Fuels and Craig Fuels.



Well equipped – Morrow's new DAF LF 45



Updating the fleet – Eastside Fuels' newest addition

The source of the graphs on this page is the Price Totem data published each month in Fuel Oil News. Figures for the Republic of Ireland are adjusted by the exchange rate to be comparable to pence per litre.

Regional margins

Without the impetus of the coldest winter for many years, margins did not reach the giddy heights of the spring of 2011. Most regions experienced margins of 4p-6p / litre for kero and 3p-4p / litre for gasoil throughout the year (except July/August when demand was at it weakest). USLD margins remained the same across the seasons, rarely going above 3p / litre.

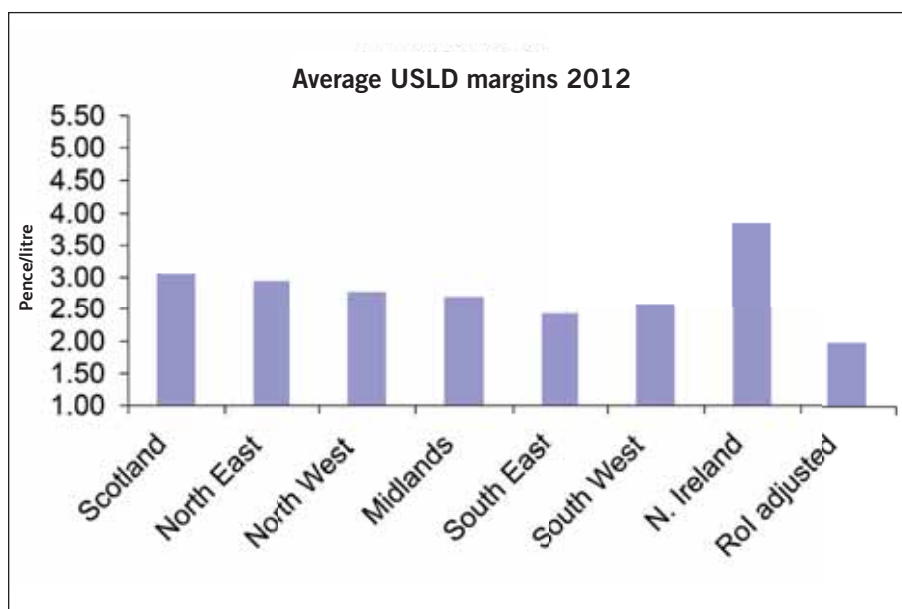
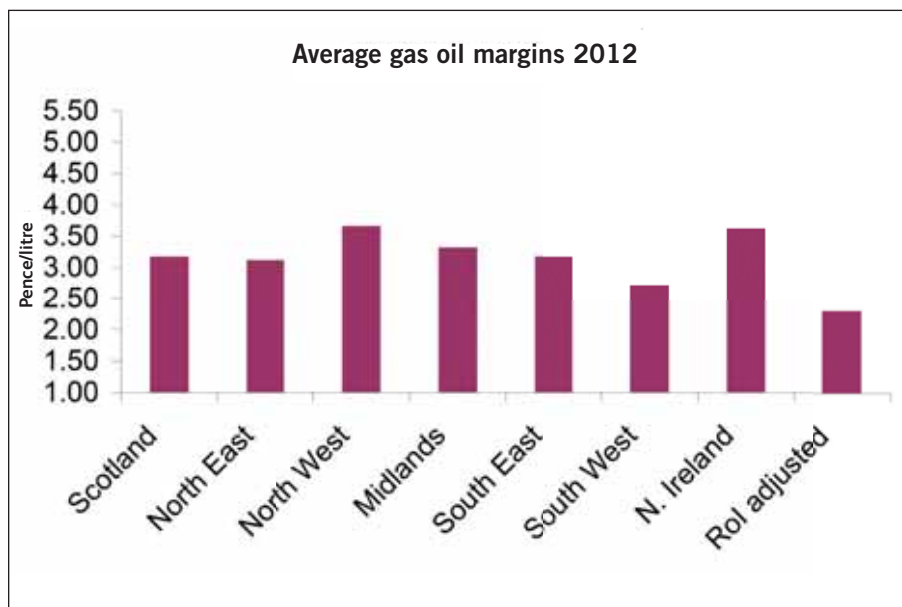
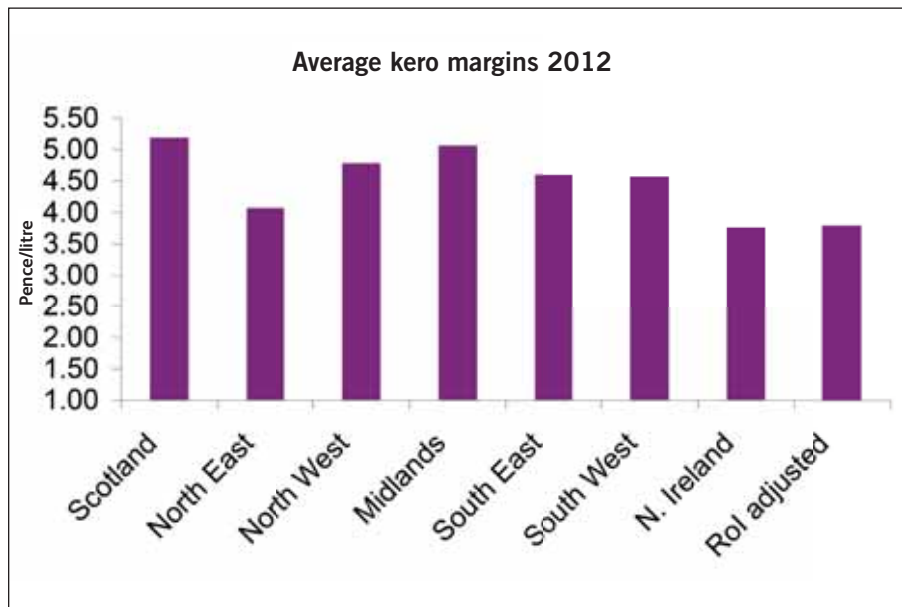
Kero: Scotland, the North West and the Midlands were once again able to manage higher margins than elsewhere – whilst the North East margins fared the worst.

Gas oil and USLD: Northern Ireland and Scotland benefitted from the best margins; the Republic of Ireland seems to have really struggled.

Prices fluctuate

The steady rise in average buying prices in 2010 and 2011 continued into the first four months of 2012. A significant decline in May and June, and then again in October and November means that at the end of the year average prices are virtually unchanged from where they were a year ago.

	Dec 2011	Dec 2012	Inc/Dec
Kero	52.24	51.42	1%
Gasoil	63.37	61.62	-1%
Deriv	110.97	110.65	-1%



Question time

Below, Teresa Sayers, chief executive of the Downstream Fuel Association (DFA) answers questions on the introduction of E10 petrol.



Q: What should distributors/retailers do to prepare for the introduction of E10?

With different characteristics compared to E5 or E0, the most important thing to do is check the material compatibility of any infrastructure - seals, pipes, linings/coatings, tanks, dispensers and associated equipment. Experience gained in the US and elsewhere has shown that E10 petrol can have a more severe impact on the degradation of rubber seals, permeation through plastic pipes and corrosion of steel tanks. The Energy Institute and the DFA are jointly funding a project to develop guidelines for assessing compatibility and to recommend materials resistant to attack.

With greater solvency and the potential to lift rust/other particulates from tanks and pipes, E10 can cause pump dispenser and vehicle filter blocking. At sites moving directly from E0 to E10, it's particularly important to remove any water bottoms in tanks to prevent potential problems with phase separation. E10's higher ethanol content makes spills more difficult to handle. There's an increased risk that fuel can get into water and discharge systems. Effective procedures to handle petrol spills, and ensure that interceptors/water separators are biofuel compatible, must be in place.

Tanks, loading arms and dispensers must be properly and clearly labelled at distribution sites and petrol stations. Guidelines for handling any mis-fuelling incidents must be displayed, and distributors/retailers need to be ready to answer consumer questions and concerns with respect to compatibility.

Q: What lessons have been learnt from other countries that have already been put into practice here?

Problems have occurred in Europe, most notably Germany. Low consumer acceptance of E10 petrol was caused by unclear guidance as to which cars were compatible. The UK has learnt that it's important to inform consumers about compatibility in a clear, unambiguous manner and to provide E10 education - *what is it?* and *how does it differ from other grades of petrol?* Any confusion in consumers' minds can lead to doubt and a slow switchover. Industry stakeholders are co-operating to ensure that all necessary consumer information is available in a user-friendly format to facilitate a smooth and trouble-free move to E10.

Nolan's appeal

Helping boost funds for the British Legion's Poppy Appeal were (l-r) Mark Nolan and Sarah Facey of Nolan Oils with Dee Grant, Barnardo's and Duncan Grant, GB Oils.

Fundraising in 2013? Over the years, Fuel Oil News has supported some brilliant fundraising efforts for many fantastic causes. If you are raising money for charity, we'd like to help you. Email jane@fueloilnews.co.uk with details.



International Petroleum Week 2013

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Conference

Exhibition

Networking



Unique to *IP Week* is its breadth of content, ranging from upstream, midstream and downstream, to finance and investment, technology and gas. It also features outlooks on specific regions such as Africa, the Middle East, Asia and Russia.

In-depth, strategic conferences will focus on:

- Global energy security
- Strategic role of innovative technology solutions
- Financing oil and gas in the future and managing international risk
- Delivering gas
- Oil and gas development in Russia, CIS & Arctic
- Energy security in Asia
- Investing in oil and gas in Africa and the Middle East
- The global outlook of the downstream industry



IP Week speakers include:

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- Samir Brikho, CEO, AMEC
- Chris Beddoes, Acting Secretary General, EUROPIA
- Elizabeth Spomer, Senior Vice President - Global Business Development, BG Group
- Angus McCross, Exploration Director, Tullow Oil
- Harry Brekelmans, Executive Vice President of Russia and Caspian, Shell Exploration and Production Services



IP Week Lunch

Tuesday 19 February 2013,
Park Plaza Victoria, London
Ayman Asfari FEI,
Group Chief Executive, Petrofac



IP Week Dinner

Wednesday 20 February 2013,
Grosvenor House, London

For more information on attending, speaking, sponsoring or exhibiting at

IP Week, please contact:

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MabaLIVE – now with online contract management

A new contract management service has been added to MabaLIVE enabling customers to view and monitor their contract price online at anytime throughout the day, and to purchase fuel as and when the price is right.

The new service has been developed in response to growing demand from customers using MabaLIVE to spot purchase fuel, who also wanted to manage their term based supply contract online. The personalised price information is in addition to the usual ex-rack and delivered-in prices.

Launched by Mabanaft in April 2011, MabaLIVE's online price information and fuel ordering service was an industry first and has been an outstanding success. (See page 2).

FEATURES

- Available Mon–Fri 8.30–5.30
- Prices are updated every minutes–virtually real time
- Intraday graph gives market overview
- Access to view order history and volumes

BENEFITS

- Saves time–fewer phone calls
- Convenient and easy to use
- View prices and purchase when it's right for you
- Monitor and manage your volume ordered
- Track your ordered monthly volume against your forecasts



Marketing manager Stephen Rhodes said: "We've been really pleased with MabaLIVE's success and its positive feedback. It soon became apparent that customers were looking to do more business online; by extending the system we can now allow customers to manage their individual supply contracts in this way too."

"MabaLIVE is convenient – available to view online, contract prices are updated every 5 minutes. It's as close to real time as can be achieved while still allowing customers time to place an order!" added Stephen. "Clear graphical information provides an at a glance reference that allows customers to track and monitor their monthly volume ordered against their forecast volume. Complete transparency of pricing is provided, giving the customer the ability to order fuel and manage their contract account quickly and easily."

To find out more about MabaLIVE and/or the new online contract management service, please call 0207 802 3300 or email sales@mabanaft.co.uk

New for FPS EXPO 2013

Taking place at the Harrogate International Centre on Wednesday 17th/Thursday 18th April, the FPS EXPO 2013 will have new features and new exhibitors.

Among this year's innovations is a dedicated *Product Theatre* where exhibitors can stage their own product demonstrations/presentations in front of visitors.

"We believe this will be a big bonus," said Vanessa Cook, FPS marketing and events manager. "The theatre is free of charge and can be booked in advance. For exhibitors with technical products, which may be challenging to explain fully on stand or require an active working demonstration, this theatre will be particularly useful."

Relevant, exciting and dynamic

Over 73% of the exhibition space has already been booked. "We're delighted that there's been such an early uptake," said Vanessa. "I've seen FPS EXPO grow year on year. Attendance year on year is higher which, in a period of recession, is extremely encouraging. If you're involved in oil distribution, FPS EXPO is relevant, exciting and dynamic."

Make a date for golf and dinner

The annual FPS Golf Day will take place at The Belfry on Thursday 13th June and will be played on the PGA National Course. "We've listened to what people have said and know that the golfers have found it difficult to pack in all they wanted."

This year's awards dinner takes place on Thursday 18th April after the EXPO closes. However, plans are afoot to switch the 2014 dinner to the Wednesday evening, making it easier for visitors to spend two days at the event with just one night's accommodation.

For more details email Vanessa Cook at vc@fpsonline.co.uk.



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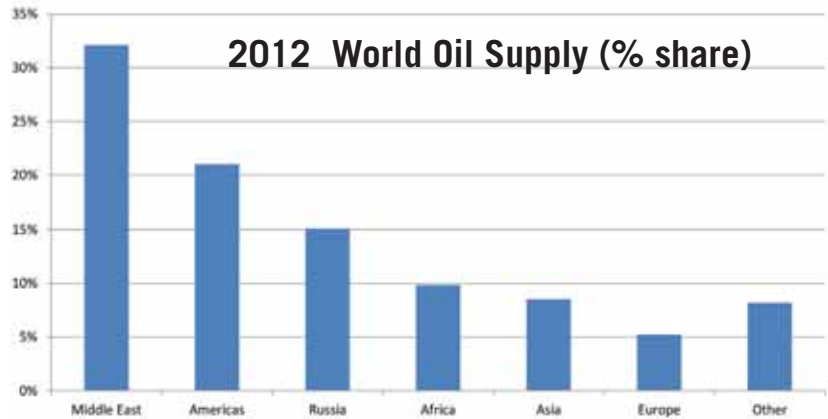
Portland market report

January update

When it comes to news, no other story dominated the headlines in the final quarter of 2012 more than the depressing (re) conflagration between Palestine and Israel. The conflict's increasingly incendiary nature kept oil prices high, as the Middle East headed towards what it often seems to do best – bloodshed, falsely clothed in the doctrines of scripture. The continued high oil price had some cynics questioning why border skirmishes between two countries with minimal energy resources, continue to play such a significant role in the energy dynamic. This view seems to ignore what it is that Israel and Palestine represent. On the one hand we have the consumer, the buyer, the user and that is the West. On the other hand, we have the provider, the seller and the supplier and that is the Islamic Middle Eastern states.

In a previous life, Portland once found himself in Bradford with a man of considerable faith, and this man opined with a mixture of humour and sadness, that divine humour was indeed peculiar. He went on to question why in His wisdom, the Man above had placed the source of one of the world's main needs (ie, energy) in the very location that the world's biggest argument would endlessly rage. Faced with this wisdom, a slightly tongue-tied Portland launched into discussing at length the first part (energy), knowing full-well that the opiner really wanted to discuss the juicier part (politics). Move forward 6 years and we still have lots of graphs to illustrate just how right the wise man was vis-à-vis energy in the Middle East, but Portland still does not have the clarity, courage or appetite to really cover the latter.

The energy facts on the graph below deliver a fairly stark message, ie that 32% of the world's oil comes from the Middle East and the picture gets worse when we analyse production in the Americas. Here, the majority of oil is produced in the USA, where not one barrel is exported to the rest of the world—100% of USA oil is used in the USA. So when we take this into account, we actually see that 37% of the world's available oil comes from the Middle East and even this assumes that the Russian Bear happily plays ball and always makes available its 17% share...



Crude Oil Supply 2012

Region	mbpd	%
Middle East	28.28	32
Americas	18.50	21
Russia	13.30	15
Africa	8.65	10
Asia	7.50	9
Europe	4.60	5
Other	7.20	8
Total	88.03	100

ME Country	mbpd
Saudi Arabia	10.00
Iran	3.20
Iraq	3.00
Kuwait	2.90
UAE	2.60
Qatar	0.73
Algeria	1.20
Libya	1.45
Oman	0.90
Other ME	2.30
Total	28.28

Source: Portland Analytics

UK, the USA and Europe condemn the actions of Israel (whether heartfelt or not), the land of David will always be viewed as a western flag-bearer to those in the Middle East. Every time the West Bank or Gaza comes under Israeli fire, the Middle Eastern world sees a western attack

That the Middle Eastern states are in the pound seats is beyond doubt, as is the fact that almost all of them – if a decision had to be made—would support Palestine, before Israel. And however much the

on their Palestinian brethren and by indirect definition, an attack on them – the suppliers of the world's oil. As the world teeters and tough men talk of lines in the sand that cannot be crossed, an energy abyss slowly opens up and oil prices will always consequently rise. The mere concept of a line in the sand, takes us one notch closer to the possibility of Middle Eastern countries cutting supplies to the West (until for example, Israel is forced to back down).

So when people scratch their heads or curse the fact that the West Bank has such a profound impact on petrol prices, they should stop and ask a deeper question. What if the situation becomes so polemic, that the Middle Eastern powers introduce another oil embargo? A world without Middle Eastern oil is unthinkable, impossible and catastrophic; lights would go out, ambulances would stop moving, shop shelves would empty and families would go cold – all in fairly short order. Naysayers may accuse Portland of melodrama as such outcomes seem outlandish in modern, comfortable Britain. But what nobody should deny is that the odds on all of the above, are heavily slashed every time Israel and Palestine go to war.



For more pricing information, see page 26

Portland Fuel Price Protection
www.portland-fuel-price-protection.com

Monumental news

It's not often that a distributor's business makes the BBC News so well done to this Monument Fuels tanker, seen here braving the weather conditions to bring fuel and comfort to the good folk of Somerset.



White Rose in the forest

A recent 5k run around Sherwood Forest undertaken by John Roberts of White Rose Fuel Services raised £768 for Cancer Research UK.

Suffering from a bad cold at the time, John coughed and spluttered his way round the forest in 37 minutes; a time he described as 'rather disappointing'. John sends his thanks to everyone who sponsored him.

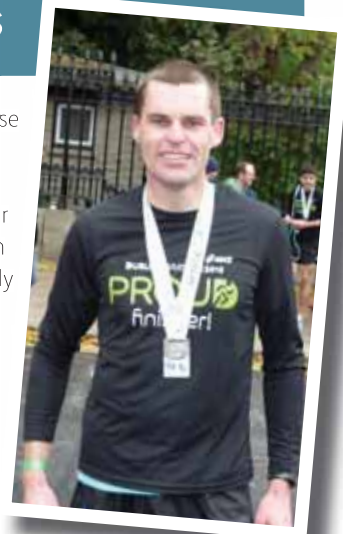

Celebrating at the finish line – White Rose's John Roberts



Simon's success

Simon van Lonkhuyzen of TEC Industrial, supplier of industrial hose and fittings, completed the Dublin city marathon in 2.59.27. To date Simon has raised 715 euros for Our Lady's Children's Hospital, Crumlin where his son, Tom was successfully treated for bacterial meningitis in November 2011 at just three weeks old. www.cmr.org/eventMembership/show/653

Simon completes his second marathon

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PHILLIPS 66 – THE PERFECT VEHICLE TO TALK

A FEW MONTHS AFTER THE CONOCO PHILLIPS DEMERGER TO CREATE A BUSINESS DEDICATED SOLELY TO ITS DOWNSTREAM OPERATIONS, PHILLIPS 66 TOOK TO THE ROAD IN A UNIQUELY BRANDED BUS TO DO WHAT IT DOES BEST – TALKING, AND BUILDING CUSTOMER RELATIONSHIPS

Over 200 dealers and distributors turned up to the Phillips 66 roadshow at exciting locations across the country, to take a seat in the specially designed double-decker bus, talk to members of the team, and learn more about the company after its introduction to the UK market earlier this year.

It was a whirlwind journey around the UK, designed to allow as many customers to attend as possible. The dual-branded Phillips 66 and JET bus visited eight iconic venues, including the Falkirk Wheel, Bristol Planetarium, Twickenham and the Imperial War Museum. Fuel Oil News joined in the fun at the last event at Old Trafford football stadium, for a chat about the benefits of the recent reorganisation, and a peek into the Phillips 66 future.

A seamless split

“Looking back at the demerger, it has appeared seamless – but there has been a lot of work from those behind the scenes in the organisation,” said Pete George, managing director, UK and Ireland marketing.

Lindsey Grant, manager, national sales, added: “The roadshow has been about showing that although operations are under a new name, we still have the same culture, mind-set and strengths. The name has changed, but we haven’t changed who we are.

“Our objectives from the outset were to introduce customers to our team and highlight our new customer-centric structure and approach. It was also just as important for us to get feedback from customers and find out more about their needs directly from them. We feel that we have achieved this and more.”

Phillips 66 was introduced in the UK in May this year, when the downstream business split from the ConocoPhillips name to create two independently operated companies. As a result, Phillips 66 focuses on downstream refining, marketing operations and trading in the UK, while also continuing to market its fuel brand as JET. The move also included a company restructure, involving the creation of a separate national sales team, led by Lindsey, to look after UK-wide brands, such as GB Oils and Watson Petroleum. Independents with a regional base are now looked after by Guy Pulham, manager, regional sales, and a team of regional managers.

Distributor benefits

“We have introduced a number of changes during the reorganisation to further support our distributors. For example, regional account coordinators have been introduced to be on hand for customers when a member of the sales team is on the road or unavailable,” said Guy. “A new online system has also been installed at Bramhall, Immingham and Kingsbury which calculates the daily amount of fuel a distributor has lifted. If needed, they can request to lift additional product, meaning no wasted journeys.

“The service we provide for each customer depends on the type and level of support they require,” added Lindsey. “Whereas national customers need a UK outlook, regional customers now have a contact within their local area to match the needs of their business. Matching technology and different planning strategies are also tailored for each customer.

“The reorganisation addresses



Out on the road – Pete, Lindsey and Guy at Old Trafford

the way the industry is heading, and means Phillips 66 is at the forefront for the benefit of our customers,” said Lindsey.

Busy ensuring that the split and restructure was as smooth as possible for customers, the company has been less vocal than usual. The roadshow presented the perfect opportunity to show customers that it’s business as usual and shout about the benefits of the structural changes.

“We’ve seen a lot of people and it’s been a lot of fun,” Lindsey continued. “Our biggest strength is our service focus and the relationships we have with our customers, so the bus acted as the ideal mobile venue for us to talk informally to people in a friendly and relaxed atmosphere.”

Culture of success

The company recognises its culture as one of its core strengths, emphasised by the name change to Phillips 66 – which has been one of the leading fuel brand names in the United States for decades.

“The Phillips 66 culture is

very family oriented,” explained Pete George. “Our values of safety, honour and commitment are a perfect fit with the UK business.

“We like to think we have a different approach. We listen to our customers and they have almost unlimited access to us – most have got my mobile number. We’ve got a very responsive and energetic team who don’t have to answer calls at 10pm, but they want to. You can’t buy that culture, you have to create it.”

Pete was planning to retire later this year, but accepted his new position as part of the reorganisation and has no regrets about continuing.

“It didn’t take a lot to persuade me to stay on after the restructure. I love the unique culture of the company, which was shown at its best throughout the roadshow. It’s a breath of fresh air in a corporate world.”

An earlier interview with Pete George was published on page 6 of the September 2012 issue of Fuel Oil News

Dealers and distributors join Phillips 66 on the road to success

Over 200 dealers and distributors turned out in force to take part in the first ever Phillips 66 customer roadshow. The whistle-stop tour of the UK on board a specially designed double-decker bus saw customers from across the country attend to learn more about the company following its introduction to the UK market earlier this year.

The roadshow route was designed to allow as many customers to attend as possible. The dual-branded Phillips 66 and JET bus visited eight iconic locations in just eight days, including The Falkirk Wheel in Scotland, the Imperial War Museum in Duxford, Twickenham Stadium and Edgbaston Cricket Ground, before finishing at Old Trafford, the home of Manchester United Football Club.

The series of events was not only for customers to learn more about the Phillips 66 brand and its team, but also to allow dealers and distributors the opportunity to discuss their own plans for the future and find out how Phillips 66 and JET could support them.

Pete George, Managing Director, UK and Ireland Marketing, was delighted with the success of the roadshow and the number of people who attended: "Our objectives from the outset were to introduce customers to our team and highlight our new customer-centric structure and approach, while also

letting them know more about our plans for Phillips 66 and JET. Just as important to us was to hear directly from them and find out more about their needs. We certainly achieved this and more."

The roadshow comes after the introduction of Phillips 66 to the UK earlier this year, following ConocoPhillips' global repositioning of its upstream and downstream operations to create two independently operated companies. As a result, Phillips 66 focuses on downstream refining, marketing operations and trading in the UK, while also continuing to market its fuel brand as JET.

"We felt it was important to get out on the road, meet customers and show them that it's business as usual after the structural changes implemented earlier in 2012," said Pete. "While it was the first time we had ever undertaken a roadshow in this form, it was the perfect way to reach out to our customers and the marketplace," he continued.

The double-decker bus was modified solely for the purpose of the roadshow. The exterior was dual branded with Phillips 66 and JET messaging, and the interior was kitted out with video screens, information zones and seating areas where customers could relax and meet with the Phillips 66 team and other industry contacts.

"While the bus acted as a mobile venue for our customers and team to meet, it was also

much more than that," said Pete. "It was packed with information about Phillips 66 and JET, such as videos, historical timelines and organisation charts, which, when combined with the knowledge of our team, meant that every possible question our customers could ask was answered on the spot," he explained.

However, the roadshow was not all about hard work. Having built a reputation in the industry for a friendly and informal way of working, the team at Phillips 66 designed each event with the same relaxed approach in mind.

"The roadshow really encapsulated the unique way we interact with our customers. I cannot think of another company in the sector that would take to the road in this way," explained Pete.

"For nearly 60 years, we have built a reputation for being friendly and approachable. The informal nature of the roadshow certainly emphasised to attendees that this is still the case. Indeed, it was just the start of our marketplace activity as Phillips 66. We look forward to building on its success in 2013," he concluded.

To view the pictures from each roadshow event, please visit the gallery on the dedicated roadshow website at www.phillips66uk.co.uk





Inside Out



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THE RETAIL FUELS MARKET

WHEN FILLING STATION NUMBERS PEAKED IN THE LATE 1960S, AROUND 13 MILLION REGISTERED VEHICLES WERE SERVICED BY A NETWORK OF ALMOST 40,000 OUTLETS. FAST FORWARD TO THE END OF 2011, AND SITE NUMBERS HAD DWINDLED TO 8480, SERVICING 34.7 MILLION VEHICLES

At over 4000 vehicles per site, the UK has the highest density in the EU, ahead of Germany (circa 3700) and Spain (circa 3100); this is a manifestation of the greater rationalisation of this sector in the UK. At 4.4m litres per year, average site fuel throughputs are the second highest in the EU, after Luxembourg and are 52% higher than in 2000.

In 2011, retail fuels represented the largest segment of the inland oil products market, amounting to 26.98 million tonnes or 39% of the total market. Geographically it should come as no surprise to learn that the south east is overwhelmingly the dominant region, with 24% of outlets, 30% of fuel volumes and 34% of

shop sales.

There has also been a significant shift in the composition of fuel market demand. Petrol sales peaked as long ago as 1990, since when they have been in continuous decline. At the start of the millennium, the average petrol to diesel volume ratio for the forecourt sector was 76% v 24%. By 2011, diesel accounted for just over 50% of the total, having grown by 89% since 2000, while petrol volumes had declined by 36% – with the total market down by 4%. This trend has continued in 2012, with diesel volumes running at 2.5% up and petrol 4% down, giving an overall market decline of 1% by mid year.

Falling site numbers have been a feature of the retail sector for the past 40 years

Year End	1970	1980	1990	2000	2005	2011
Site Numbers	37,539	25,527	19,465	13,053	9,764	8,480

Source: Petroleum Review

Changes in the retail landscape

Market dominance by BP, Esso and Shell is much less pronounced, the trio's combined market share is now assessed at around 37%. Up to the early 1990s it was 55-60%.

Rationalisation/divestment – in 2001 Jet divested its company owned network, Texaco a few years later. BP has sold significant numbers of its company owned/leased estate while Esso is adopting the US branded wholesaler model.

Multi-site independent dealer networks such as Malthurst Retail Holdings, Snax 24, EuroGarages and Park Garage Group have grown to supply approximately 40% of the market.

Supermarkets – in particular Tesco, Sainsbury, Asda and Morrison – have become a major force. Their original participation can be traced back to 1974 but over the past 20 years they have established a substantial presence. Market share has grown from around 7% in 1990 to 25% in 2000 and 41% by 2011. UK market leader, Tesco has an assessed share of 15.5%. Supermarket annual average site volume is 11.25 million litres per year, the average for the rest of the industry is three million.

Shop sales now total about £4.3 billion, equivalent to £520,000 per site per year – pressure on fuel margins necessitated the development of alternative earnings streams. C-stores of the majors include Esso On the Run, Shell Select and BP Connect plus Esso/Tesco Express and Shell/Sainsbury Local alliances. Independents formats include the Co-operative, Shop'N Drive (Snax 24) and Park & Shop (Park Garages) whilst independent dealers favour Spar, Mace, Costcutter, and Londis.

Biofuels – compliance with RTFO requires a biofuel content of 4.5% up to March 2013; this rises to 5% from April 2013. Typical forecourt grades now comprise up to 7% biodiesel and 5% bioethanol.

What's next for the retail sector?

The forecourt sector has shown extraordinary resilience in the face of unrelenting competitive pressures, adapting and evolving to meet both these and changing consumer demands. A number of challenges still face the sector:

(1) What will be the impact of the current OFT investigation into price transparency?

A contentious area is addressing public concern about the transmission mechanism between changes in crude oil prices and the resulting changes in pump prices i.e transparency around wholesale prices. At the time of going to press a report is imminent.

(2) How much more market penetration will supermarkets achieve?

In France the share has settled at around 58%.

(3) To what level will total site numbers decline?

Some have suggested a network of around 6000 sites.

(4) What part will unmanned sites have in the future network?

(5) How much more scope is there to drive non-fuel earnings?

(6) What new entrants might appear?

Recent years have seen the entry of Harvest Energy, Rontec, GB Oils and Greenergy.

(7) What new fuels, such as CNG or hydrogen, will become available?



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IS THE HEATING OIL MARKET THREATENED BY THE GOVERNMENT'S DECISION NOT TO SUPPORT BIOLIQUIDS UNDER THE RENEWABLE HEAT INCENTIVE?

Ben More, Moorland Fuels, Devon

"After attending The Oil & Renewable Energy Show in October and conducting our own research, it's clear that alternative energy sources and government incentives have to be taken seriously.

"As a fuel supplier, we firmly believe that biofuels have a significant part to play in the future as a reliable and trusted fuel source. As such we continue to promote the benefits of fuel oils and derivatives to our customers, while keeping an eye on the impact new technologies are having in our market place and the future thereof."

Trevor Rolph, Monument Fuels, Somerset

"I don't think it will have any noticeable effect. Let's be realistic – unless there's some great development in the way energy is generated from oil, which makes it either environmentally friendly or extremely cost effective, we will remain in a mature market."

Carrie Marsh, Marsh Fuels, Berkshire

"To be honest, I would need a degree to understand the Renewable Heat Incentive in the first place. It does not affect our customer base at present."

Kevin Bennetts, Consols Oils, Cornwall

"We operate in an increasingly mature market place where the only prospect for any future growth will come at the expense of competitors, who are unable to compete on service. Of course price, as always, will be an issue but the current vogue for mega buying groups will eventually run its course along with the mega distributors who are the next generation of dinosaurs in gestation.

"Someone once said a *good little un* will always beat a *big un*. Our aim is to be a *good little un*, consolidating a rock solid customer base within a clearly defined territory, always getting better at what we already do well and letting our customers judge us on performance. All we need

to achieve this objective is a reliable supply of gimmick free kerosene at a competitive price.

"I've always viewed biokerosene as a gimmick, cynically promoted by aspiring bandwagon hoppers. Life is already complicated enough, given that further complication will add further costs which the customer will pick up, invariably and almost inevitably to our collective disadvantage."

Who is switching to renewables?

"The Renewable Heat Premium Payment communities scheme, launched in July last year, offers a valuable insight into the type of consumer opting to switch to renewable heating technologies," says Paul Stephen. Find out more in the February issue of Fuel Oil News.

Should oil give up without a fight?

Email jane@fueloilnews.co.uk.

What is the Renewable Heat Incentive?

"Like so many of the government's strategies to boost the deployment of renewable technologies, the aim of the Renewable Heat Incentive (RHI) is quite simple; whilst its details remain fairly difficult to digest," says Paul Stephen, staff writer at Renewable Energy Installer magazine. Below Paul explains the RHI.

Only 2% of total heat demand in the UK is currently generated from renewable sources such as biomass and heat pumps. The RHI is designed to reduce the financial barriers faced by homes and businesses installing these technologies, which currently struggle to compete on a cost basis with traditional energies such as oil and gas.

Phase 1 of RHI (industrial) has been in operation since November 2011. Phase 2 (domestic) is scheduled to come on stream this summer with an estimated 40–50,000 installations being completed per year. Although eligibility is not limited to off-grid areas, the scheme will focus on the 1.5 million properties in these areas.

Proposed tariff ranges for the domestic RHI

Technology	Proposed tariff rate (pence/kWh)
Air source heat pumps	6.9 -11.5
Ground source heat pumps	12.5 -17.3
Solar thermal	17.3
Biomass boilers	5.2 - 8.7

Air source and ground source heat pumps, solar thermal and biomass boilers will all be eligible for the domestic RHI, provided the technology is Microgeneration Certification Scheme (MCS) accredited and was not installed before 15th July 2009.

NB: DECC has excluded biomass bivalent (combining an existing oil/gas boiler with a renewable energy technology to reduce energy bills) systems from the domestic RHI over fears that consumers will switch back to fossil fuel heating after the payment period elapses. Heat pump and solar thermal systems can be bivalent as long as they are metered.

Householders who receive Renewable Heat

Premium Payment (RHPP) funding (available until March 31st 2013) will have this subtracted from their payments. Properties will also have to meet energy efficiency criteria and undergo a Green Deal assessment.

Under current proposals, tariffs will be paid to homeowners over a 7-year period to cover the property's assumed heat load. DECC has opted to deem the heat usage of a building rather than meter it in order to avoid incentivising any overproduction. (The total cost of funding RHI tariffs over the next 7 years will be £400m.)

Although similar in many ways to the Feed-in Tariff which incentivises renewable electricity generation, RHI has no export tariff element as the entire heat output of a system will be consumed on site.

A NEWCOMER TO THE UK, THE VALERO ENERGY CORPORATION ENTERED THE UK MARKET LAST SUMMER FOLLOWING ITS ACQUISITION OF CHEVRON ASSETS INCLUDING THE PEMBROKE REFINERY, PIPELINES, TERMINALS, AN AVIATION FUELS BUSINESS AND A NETWORK OF OVER 900 TEXACO-BRANDED SERVICE STATIONS IN THE UK, PLUS AROUND 230 IN IRELAND. THIS FORTUNE 500 COMPANY HAS HEADQUARTERS AT SAN ANTONIO IN TEXAS WITH TOTAL ASSETS (AT THE END OF 2011) PUT AT \$42 BILLION.



Eric Fisher



Mike Lewis

A POSITIVE STORY FOR THE UK

Market opportunities

Keen to know what attracted Valero to the UK market, Fuel Oil News editor Jane Hughes recently met with Eric Fisher, president – Europe and Mike Lewis, director – product supply, at the company’s UK headquarters in London’s Canary Wharf.

“Valero has had a keen interest in acquiring an asset in the UK or ARA (Amsterdam Rotterdam Antwerp) markets for some time,” said Eric. “Having a North Atlantic position enables us to do commercial trades here and to gain a much better insight into the European market.

“The Chevron acquisition has given us an excellent entry into the UK – it was a good opportunity that came with good people and good logistics. With this European foothold, Valero has the ability to ship excess gasoline back to the north east US, where many refineries have closed. And, on the flip side, we can bring diesel back to the UK and ARA region.”

Now firmly focused on profitably growing its inland volume, Valero has already made significant investment to move more barrels into the Midlands market and to offer its customers quality products at a competitive price.

The company has an interest in four pipelines and owns five terminals – Avonmouth, Cardiff, Kingsbury, Manchester and Plymouth, and is part owner of a terminal in Dublin. The Mainline pipeline which connects the Pembroke refinery with the Midlands and Manchester is also under Valero ownership.

To further strengthen its supply position in the Midlands and north west of England, Valero will be reopening the Manchester Fuels terminal this spring. “This terminal is very conveniently placed; former and prospective customers are very enthusiastic about its reopening,” said Mike. “I am pleased to say that Valero has been very well received in the UK market place and our work force is proud of what we’ve achieved to date. We’ve had some excellent feedback.”

An experienced refiner

“The refining market is volatile, seasonal and cyclical but we’ve got the experience in this business,” said Eric. (Valero is now the world’s largest independent refiner with 15 refineries producing 2.8 million barrels of oil per day.)

“Western Europe is a challenging market to operate in, and it’s very competitive. That said, we’ve been here 14 months now and we’ve found nothing here that we had not already anticipated.

“Valero is very pleased with its UK acquisition. There are still more opportunities to reduce costs, to be more effective and to ensure we continue operating safely – we work to improve on these things every single day,” Mike added.

Valero’s refined product customers include its network of Texaco sites, branded wholesalers, jet fuel handlers and supermarkets.

Kerosene is a sizeable market for Valero. From allocated crude stocks, the company



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Developing a sense of community

A recognised community leader, Valero likes to give back to the communities in which it works. Eric explained: "Well established in all the countries in which Valero operates, we've got volunteer schemes, charitable giving and governorships going in the UK and Ireland. To date employees have volunteered 785 hours to local projects."



Valero staff volunteering at Monkton Priory Community School in Pembroke

currently sells 83% as kerosene and 17% as jet fuel but acknowledges that kerosene demand is 'steadily decreasing.' Ireland is one of Valero's biggest kerosene customers.

Asked if they thought the UK's kerosene market would be quickly eroded by the UK government's renewables drive, Mike replied: "Not yet, such transitions take a lot of time. The good thing about kerosene is that it's a dual

purpose fuel. In an area that's short on fuel, we could easily switch more kerosene sales to jet fuel."

Introducing E10 and the possibility of a Valero brand

The challenges of introducing E10 into the UK market were also discussed. "E10 is difficult as the rules are far from clear," said Mike. "By early January, it will be possible to put up to 10% ethanol in petrol but will that be introduced on the forecourt? The industry is waiting for some guidance as to when, where and what. We look to the government for direction and to communicate with consumers."

FON also asked about the possibility of a Valero brand being introduced to UK forecourts. "We're evaluating our options with respect to rebranding. Texaco is a strong brand with a long history in the UK so this is clearly something we have to consider very carefully," said Eric.

So have there been any regrets about entering the UK market? "Valero is a positive story for the UK, the company is well-capitalised and we're still excited about being here. Make no mistake the UK market is very different, but it's been a great transition and we've got a great team here. We're here, we've identified the assets and we're continuing to invest."

Valero was formed as a pipeline company in Texas in 1980. The company acquired a shutdown refinery site at Corpus Christi, now one of the newest refineries in North America. In the mid 90s, Valero chose to sell its pipeline business to grow the refining side. Valero is now the world's largest independent refiner with 15 refineries producing 2.8 million barrels of oil per day. With 21,000 employees, Valero operates in the US, Canada and the Caribbean and also owns 10 corn ethanol plants in the Mid West, a biodiesel plant in Louisiana and 6800 branded retail sites.



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THE BATTLE TO OFFER A COMPETITIVE PRODUCT

CASH CONSCIOUS CONSUMERS, ROGUE TRADERS DEALING IN WASHED DIESEL AND A SHARP RISE IN THE USE OF SOLID FUEL, ENSURES THAT OIL DISTRIBUTORS IN THE LEINSTER REGION ARE FEELING THE HEAT THIS WINTER, WRITES IRISH CORRESPONDENT AINE FAHERTY



With other strings to its bow, Top Oil has invested in its Dublin terminal

Martin Daly, head of sales and marketing at **Top Oil** says that a succession of shorter winters, coupled with a short home heating season, is putting pressure on the sector, as people use their central heating as a last resort. "People are burning turf or whatever fuel they can and supplementing this heat with oil," says Martin. "In a bid to save them money in the long term, people are investing in solid fuel burners instead."

Tackling low margins

Outlining how consumer spending has changed, Martin said heating oil order sizes had reduced to 500 litres and even 300 litres, down from an average 1000 litres a few years ago. "Drivers are busy but orders are small," said Martin, whilst highlighting that Top Oil can no longer charge a premium for a small drop, as it would isolate too many customers. As a result, he underlined how difficult it is to get a margin on this side of the business.

To survive in the current climate, it has been important for Top Oil to have other strings to its bow. The company has concentrated on other offerings including its retail outlets and fuel cards, which are going strong.

To tackle low margins on small orders, Ardee-based **Malone Oil**

Products, which delivers in Meath and the border county regions of Louth and Monaghan, sourced a mini-tanker in early 2011. For smaller deliveries, director Pdraig Malone reports this tanker is cheaper to operate than the two 20,000 litre tankers also in the fleet.

Calls for lower taxes, COD and drums

Due to Malone Oil's proximity to the border competition from Northern Ireland-based distributors, who can sell the same product at a much cheaper rate due to lower tax rates, is another ongoing problem. Although Pdraig appreciates that the Irish government cannot determine the price of fuel, he says they could lower the level of tax on it; but he is not hopeful that this will happen anytime soon!

Hugo McManus, operations manager at Kildare-based **Tougher Oil** is critical of the high level of tax on oil products in Ireland, which he highlights accounts for 60% of the cost that customers see daily.

"There's pressure from every angle," he says with credit terms reduced from oil suppliers, which in turn need to be passed on to the consumer. "For the most part we need to demand cash on delivery which isn't always what the customer wants to hear," said

Hugo. "But it's too risky to accept anything less."

As order sizes have dropped, Tougher noticed a niche for the sale of 20 litre drums of home heating oil and now sees a growing demand for them at its forecourts.

"Loyalty doesn't come into it anymore," he says with very little guaranteed return custom and distributors now held to ransom by the price conscious consumer.

Cutting out the cowboys with ROM1

Gary Power, director of Dublin's **Liffey Oil** says the introduction of new daily pricing has made the market ultra-competitive with customers willing to change supplier for as little as one euro on a bulk purchase.

Gary hopes that the new *Monthly Return of Oil Movements* e-filing requirement introduced on 1st January 2013 will cut-out a lot of cowboys who are dealing in washed diesel. Washed diesel is proving a big hit with cash strapped customers, but it is taking substantial business away from genuine businesses like his, he says.

At the moment, it is thought that somewhere between 12-20% of diesel on the market has been tampered with, with its distributors then able to sell their product at sometimes 9% below the average price.



"There's pressure from every angle" says Tougher's Hugo McManus

It is apparent that competing on price is paramount for oil distributors with most consumers now ordering smaller amounts of fuel, less often. What is also important is that the quality of the product and the level of service remain high and are not lost in the battle to offer a competitive product.

Keeping the home fires burning

Whilst speaking to distributors this month, Aine Faherty reported no evidence of investment in renewable technology (biomass, air/ground source heat pumps or the installation of solar PV/thermal equipment). "Basically, distributors said people weren't investing money in any green equipmenteven though it might save them money in the long-run."

"Irish consumers are reverting back to using open fires more," said Aine. "They're also investing money in having solid fuel burners installed in their homes and connecting them up to the central heating system, thus taking away the need to rely as much on oil or gas.

"Whilst there are big advertising campaigns being run by solid fuel burning businesses, there are not many businesses advertising in the renewable energy sector as yet. Undoubtedly, this will change in future."

Fuel Oil News welcomes your opinion – jane@fueloilnews.co.uk.

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Carried out by former Dragons’ Den star, Doug Richard, the *Richard Review of Apprenticeships* (www.bis.gov.uk), found that the quality of some schemes means that the benefits for employers and employees are being lost.

One company bucking the trend is Petroineos – its apprenticeship scheme – with 150 enrolled across the UK – was applauded in the House of Commons recently.

Communications manager, David East commented: “We were delighted to have been at the House of Commons. Meeting with policy and decision makers provided us with an opportunity to highlight to them the importance to UK manufacturing of having a vibrant talent pool.”

Recognising the challenge of recruiting good quality people into engineering, David added: “For UK manufacturing in general and INEOS specifically, it is crucial that there continues to be investment in skills to provide the next generation of engineers, as the age profile of highly skilled engineers continues to increase. For manufacturing to thrive, the UK needs a large and growing reserve of people with the knowledge and skills to deliver world-class manufacturing and research and development.”

For the second year running, DAF Trucks has been named as a *Top 100 Apprenticeship Employer* by the National Apprenticeship Service and City & Guilds.

Ray Ashworth, DAF Trucks managing director, said of the scheme: “Over a three year period, it combines on-the-job practical training with periods of intense study at the City of Bristol College and results in students achieving nationally recognised qualifications of the highest standard.”

For Ray, being able to provide a higher level of customer support was a key benefit. “The trucks we sell are technically very sophisticated and represent a significant capital investment for their operators. The hundreds of young technicians who have gone through our apprenticeship programme and who are now employed across our dealer network provide our customers with a clear measure of confidence that we can consistently deliver that level of support.”

Neil Ryding, managing director at FAST Exocet, which employs clerical and production apprentices, believes that the advantages for



Petroineos is actively supporting apprenticeships – “it is crucial that there continues to be investment in skills to provide the next generation of engineers,” said David East

his company are threefold. “It provides us with a more balanced age profile, gives us people continuity as we fulfil our growth plans, and also enables a positive local profile and good relationships with the local training providers and colleges.”

Shaun Harte, of Tasca Tankers, agreed that taking on apprentices changes the age profile of the company’s skilled workers. Tasca runs an apprentice scheme in association with Wakefield College, and have taken three young recruits each year for the past three years. Of those nine, eight are still employed by the company.

The first year of a new work placement scheme has also gone very well. Andrew Bell, who featured on the front cover of Fuel Oil News June 2012 issue, worked for Tasca for a year as part of a mechanical engineering degree.

“The placement gives a young engineering degree student the opportunity to experience real life engineering,” said Shaun. “They can see a sheet of aluminium transform into a fuel oil tanker, which is ready to deliver to customers.

“For us, we benefit from a young student with a different way of thinking. They see our existing production facilities with a slightly different viewpoint, and give us new ideas.”

He added: “It was our first year of running it, but we’re hopeful he may come back to us. I

don’t think there are many Andrew Bells in the world! We were very lucky, I’m sad to see him go back to university.” (See also page 24).

Tim Bates, managing director of GB Lubricants and Fuels, agreed that success depends on the person. “Some graduates want to be chairman within two years. However, if you manage to select the correct person, they can bring many qualities to the business, such as enthusiasm, intellect, IT skills, and an eagerness to learn. It is essential that the right person is selected rather than just because they are a graduate.”

With the government increasingly focused on apprenticeship schemes, Fuel Oil News asked the UK’s largest fuel oil distributor, GB Oils if they had looked into such possibilities. “Unfortunately, the nature of GB Oils’ business is not currently conducive to offering apprentice schemes. However, we are looking into ways in which we can model a scheme to fit the business structure.”

Going back to the aforementioned Richard Review, Doug Richard’s aspirations are ‘to hear about an 18 year old who looked at their options and turned down a place at Oxbridge to take up an apprenticeship and I want to hear that their parents were thrilled.’

Dantec in partnership

Merseyside composite hose manufacturer Dantec has a new deal with Danish distributor, Fontenay A/S. The company has also launched a fresh transatlantic campaign after signing a major deal with Texas agency True North Works.

Dantec's managing director John Laidlaw said he estimates that the global composite hose sector is worth around £45m and that Dantec is only 'scratching the surface' of the market.

"We have one of the most comprehensive ranges of high quality composite hoses in the world combined with more than 40 years of manufacturing and technical excellence. This is the message we will be communicating to boost our market share."



John Laidlaw, Dantec's managing director, says its deal with True North Works will propel the company's brand across the USA



This low voltage ATEX approved pump from CTS can be used for dispensing petrol and kerosene

CTS expands Piusi range

Centre Tank Services (CTS), the exclusive UK distributor of Piusi fuel transfer equipment, has expanded its range to cater for the needs of the flammable liquid market. The company's product portfolio now includes ATEX certified equipment, suitable for the dispensing of petrol and kerosene.

The Piusi EX50 ATEX approved pump is designed for the transfer of petrol and kerosene in a potentially explosive environment. Manufactured in Italy, the pump is also available as part of a refuelling kit, complete with nozzle, filter, drum connector, telescopic down tube and hose.

This low voltage pump is ideal for many applications including mobile drum dispensing. Its uses include refilling heating oil tanks when tanker access is difficult and refuelling race/rally cards.

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THE DISTRIBUTOR RESPONDS...

IN THE OCTOBER 2012 ISSUE, FUEL OIL NEWS LOOKED AT COMMUNITY BUYING GROUPS FROM THE PERSPECTIVE OF THE GROUP ORGANISER; THIS MONTH, IT'S BACK TO DISTRIBUTORS TO AIR THEIR VIEWS

"If members of a local community got together and formed a group to force the butcher to reduce the price of his mince, there would be a hullabaloo!" argued Ian MacMillan, **BD Fuels**. "Why then should government—both national and local—actively encourage activists to form vigilante buying groups to force down the price of fuel?"

"The problem with our industry is that if we don't want to deliver, we give groups a high price to avoid winning the business," said David Hodge, managing director of **Ribble Fuels**. "The group then publicises this high price to members saying they've have made savings of x ppl or £ per 1000 litres. If we quoted 0.50ppl too high we would not get the order and they couldn't quote massive savings."

"So it's really our own fault – or we should be brave and tell them we don't want the business. Buying groups will only affect the marketplace if we let them."

"We take the attitude that we will use buying groups as they use us," said David Fairchild, managing director, **WP Group**. "So in summary, if we're light on work and the group purchase makes financial sense then we'll compete for it. But, if we're just delivering to regular, loyal customers we won't. It's simple really—we just play them at their own game."

Supplying buying groups can have an impact on a distributor's ability to deliver a top quality service says Ben More, **Moorland Fuels**: "In times of peak demand we always prioritise service to our loyal, regular customers. Moorland Fuels does its own work in the community, setting up groups who use a central point such as the village store to place orders with the company at a competitive price. Staff also contact customers to let them know when tankers will be in their area."

"If there's a rise in demand over the winter, some bigger distributors that have made

significant cutbacks will struggle to meet the larger buying groups' delivery expectations."

A distributor with 20 years experience, who wished to remain anonymous, agreed. "We wouldn't want to commit to a larger group; it could have a negative impact on the service we're able to offer our regular customers."

To avoid compromising service levels to loyal, regular customers, Ian Macmillan suggests a different level of service for groups. "If we can get paid up front, charge for credit cards, only supply what's ordered, charge for aborted deliveries and only deliver when we feel like it; why not supply groups? We just need to educate these consumers to expect a budget service for a budget price!"

Send your comments to:
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TOP UP TELEMETRY – WHAT’S ON OFFER?

IN THE DECEMBER ISSUE, FUEL OIL NEWS COVERED THE SUBJECT OF TANK TOP UP SERVICES. WHILST CONCERNS WERE RAISED ABOUT THE RELIABILITY OF SOME PRODUCTS, MELANIE NOEL, WP GROUP’S FUEL SALES MANAGER COMMENTED: “ALTHOUGH THERE HAVE BEEN A FEW ISSUES WITH OLDER SYSTEMS, MAINLY THE BATTERY, NEW TELEMETRY HAS IMPROVED.”

In this issue we take a closer look at available telemetry – its features, benefits and reliability.

Never out of reach

“Dunraven Systems’ Apollo RMS remote tank monitoring system is already the telemetry system of choice for many distributors,” says managing director, Gerry Jones. RMS allows distributors to remotely monitor customers’ tanks without leaving their depot. “Wherever and whatever the tank, we’ve got a reliable and affordable way for distributors to remotely monitor it. Even when a tank may be out of range, with Apollo RMS, it need never be out of reach,” adds Gerry.

Whilst some systems are dependent upon access to mobile communication networks to relay consumer data to the distributor, Apollo is different, argues Gerry. “We recognise, a significant number of tanks still remain beyond the reach of mobile networks – especially in rural areas, where oil is more prevalent. Therefore, we offer customers a choice of communication technologies including analogue, broadband, GPRS and GSM technologies, all of which can be integrated into the Apollo RMS system.”

The company also places a strong emphasis upon ‘backward compatibility’. “There are over a million Apollo products already installed worldwide and from a distributor’s perspective, it’s reassuring to know that Apollo RMS isn’t just compatible with the very latest Apollo hardware... it’s also compatible with the very first hardware we ever produced too,” says Gerry.



“Apollo RMS remote tank monitoring system is already the telemetry system of choice for many distributors,” says Gerry Jones

Peace of mind

“The SmartGuard fuel tank gauge and alarm system is ideally suited to help distributors manage their top up customers,” says Steve Richardson, director, Fuel and LPG Services.

“The system constantly measures fuel levels and sends data back every two days. Gauge reliability is critical; a top up customer running out is a situation none of us want. This is why the system has a 5-year warranty,” he added.

Having managed a customer top up service for many years, Steve is fully aware of the issues distributors face. “As the costs of running a tanker become more expensive, it’s important that we use them as efficiently as possible, delivering more and driving less. Therefore, rather than taking an educated guess at what the customer requires, the SmartGuard enables you to accurately predict the volumes required.

“The SmartGuard has been developed using technology from other industries. Battery life, in particular, is managed and the components are more robust than many others out there.”

Following a recent trial, the entire customer base at Three Counties Fuels now uses the system. Managing director, Pauline Newcombe said: “The Smartguard is a powerful customer retention tool. It enables us to stage deliveries throughout the entire year reducing seasonal peaks and troughs, and gives customers’ peace of mind that their tanks are alarmed against theft, and will never run out.”

Logistics management

Kingspan Environmental’s SonicSignalman is a one-part device that uses the latest ultrasonic and GSM technology to remotely monitor oil levels.

The device has an SMS facility, enabling distributors to send updates to their customers about promotions, planned delivery runs, offers on other oil related products etc. These messages can be broadcast to all customers or sent to those in specific locations. The information can be used to improve logistics management, reducing the number of wasted deliveries and spreading periods of peak demand.

Additionally, customers will have access to a consumer services portal, bespoke to their distributor, where they can purchase a wide range of services including theft alerts and an iPhone app.



Smarter telemetry with SonicSignalman – text updates for customers and an iPhone app

Data to save you money

Powelectrics design and manufacture remote monitoring solutions. “As consumption can vary it’s hard for distributors to predict when a tank needs a top up and every trip to a customer costs money. Before the use of telemetry, 86 % of deliveries were inefficient. The use of remote tank level monitoring has increased the average amount of product delivered to a customer per visit by 34 %,” says sales director, Dave Oakes.

“The cost savings are significant and of course there’s a dramatic reduction in CO2 emissions, but the benefits don’t stop there. Users can integrate the data into their computing systems and interface with sales order processing and routing/planning software.”

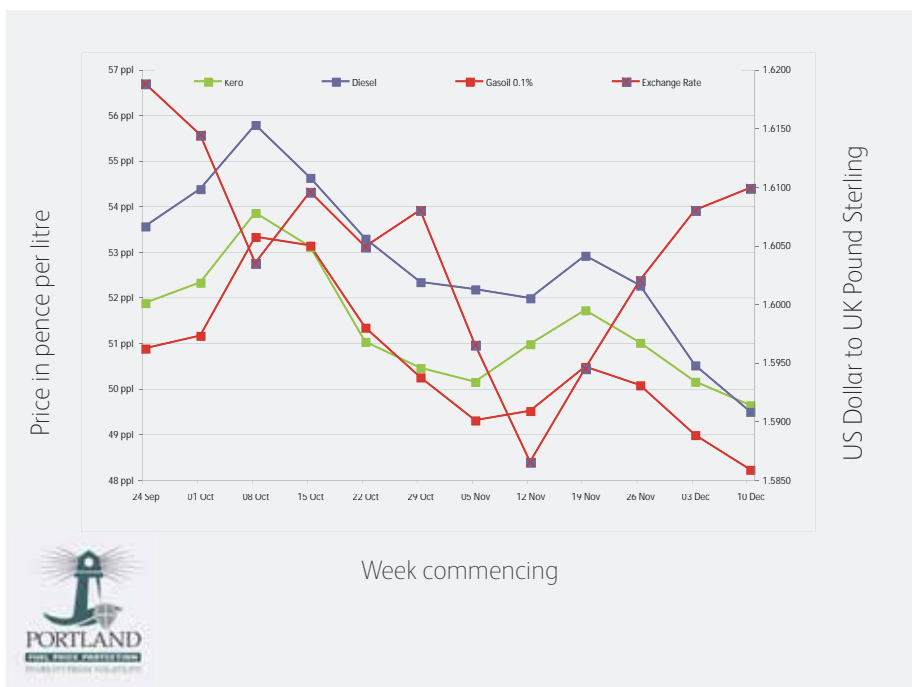
“To ensure our solutions are very reliable, devices have been designed to work with different types of sensors,” adds Dave. “In heating oil tanks we would recommend a submersible pressure sensor with compensation for changes in atmospheric pressure.

“Our units are manufactured using the latest pick and place automated systems, with components being placed to within 30 um. This leads to exceptional reliability and is supported by innovative power management technology that maximises battery life and signal strength, ensuring communication is as efficient as possible. The use of multi-network sim cards further enhances communications reliability, especially when devices are deployed in rural locations.”

Wholesale Price Movements: 19th November 2012 – 12th December 2012

	Kerosene	Diesel	Gasoil 0.1%
Average price	50.74	51.52	49.55
Average daily change	0.37	0.50	0.40
Current duty	0.00	57.95	11.14
Total	50.74	109.47	60.69

All prices in pence per litre

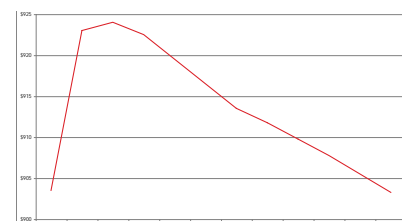


Highest price 51.93 ppl Mon 19 Nov 12	Biggest up day +1.10 ppl Mon 19 Nov 12
Kerosene	
Lowest price 49.32 ppl Tue 11 Dec 12	Biggest down day -0.75 ppl Tue 04 Dec 12

Highest price 53.40 ppl Mon 19 Nov 12	Biggest up day +1.46 ppl Mon 19 Nov 12
Diesel	
Lowest price 49.08 ppl Tue 11 Dec 12	Biggest down day -0.95 ppl Tue 04 Dec 12

Highest price 50.75 ppl Mon 19 Nov 12	Biggest up day +1.60 ppl Mon 19 Nov 12
Gasoil 0.1%	
Lowest price 47.91 ppl Tue 11 Dec 12	Biggest down day -0.90 ppl Tue 04 Dec 12

Gasoil forward price
in US\$ per tonne



December 2012 – November 2013

The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerozene	Gasoil	USLD	Kerosene	Gasoil	USLD
Platts	51.42	61.62	110.65			
Scotland	51.94	63.19	110.54	58.59	67.42	114.25
North East	53.41	63.81	111.60	59.90	67.96	114.97
North West	52.86	63.49	110.75	59.93	68.43	114.23
Midlands	52.78	63.27	112.12	62.77	68.20	116.53
South East	53.22	64.00	110.87	59.74	69.33	115.04
South West	53.53	64.03	111.53	62.42	67.72	114.43
Northern Ireland	52.38	63.73	112.12	57.62	69.63	116.24
Republic of Ireland	73.66	78.77	117.89	79.37	82.92	121.82

The price totem figures are compiled from the results of a telephone survey of distributors carried out on 06/12/2012

Buying prices are ex-rack. Selling prices are for 1000 litres of kero, 2500 litres of gas oil and 5000 litres of USLD (Derv in ROI). Prices in ROI are in €.

The FON Price Totem includes Platts derived market data, supplied courtesy of Platts and BigOil.net. This allows distributors to make a comparison with the average buying prices.



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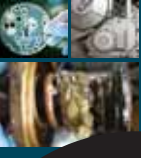
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