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Ignorance is not bliss for the government

Ignorance more frequently begets confidence than does knowledge:

Charles Darwin

Eighty-four per cent of those eligible to vote in the Scottish independence referendum chose to vote. It was a vote that stirred up passions.

'Flawed' and 'inefficient', Green Deal has barely made a ripple in the public conscience; the House of Commons Energy and Climate Change Committee now says its first 18 months have been 'wasted'.

Was ignorance rather than knowledge the reason it 'failed to live up to expectations'? This poorly marketed and largely incomprehensible scheme may have had a noble vision to retrofit existing UK housing stock and lower carbon emissions, but did anyone investigate the potential behavioural barriers blamed for its poor take up beforehand?



A new Moorland Fuels tanker on Dartmoor – evocative of the many cross country journeys through stunning scenery that fuel tankers make across the UK every day. See page 9.

Over half of UK inhabitants fail to save for a pension as living costs consume most of their income. Knowledge of fuel poverty shows that almost 30% of rural households in England and 47% in Wales currently live in fuel poverty. Any spare cash - faced with saving the planet for tomorrow or having a holiday today, there's no contest!

And did it come as a surprise to anyone that the largest percentage of uptake of the Renewable Heat Incentive is in the affluent gas-fired south east?

The government wants to improve the energy efficiency of one million homes by March 2015. Only 25 million more to go!

If energy efficiency is 'too great an untapped opportunity to fall on deaf ears once again, it needs to be a national infrastructure priority,' says John Alker, UK Green Building Council. How about stirring some passions and ditching HS2 in favour of improving more people's lives?

Fuel Oil News

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

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As the heating season approaches OFTEC asks is the Renewable Heat Incentive target an unrealistic goal?

OFTEC's concern about lack of interest in the domestic Renewable Heat Incentive (RHI) launched earlier this year is supported by a recent survey of 750 oil heated homes conducted by Watson Petroleum (www.fueloilnews.co.uk) and OFTEC. This revealed that just 4% would consider switching to an air source heat pump, with 73% choosing to upgrade to a new oil condensing boiler.

OFTEC believes that a simple, all-inclusive boiler scrappage scheme would appeal to a wider audience and go much further in helping the government achieve its ambitious goal of 80% less carbon emissions by 2050.

Targets set out in the impact assessment produced by the Department for Energy and Climate Change (DECC) state that the RHI will support around 750,000 renewable heat installations by 2020 – that is approximately 10,800 new accreditations per month.

Figures released by OFGEM in July showed that since the RHI was launched in April, 5,158 renewable heating systems have been accredited under the scheme. At the current rate of take up, DECC's goal of 10,800 new accreditations per month looks unrealistic.

"Even before the RHI was launched, we voiced concerns that the scheme would suffer the same fate as Green Deal," said OFTEC director general, Jeremy Hawksley. "RHI payments only come into play once the renewable heating system has been installed and the average consumer simply cannot afford to get started due to the high upfront installation costs of between £8,000 and £15,000.

"Whilst we recognise that the initial take-up of any such scheme is often low and that momentum may build, there's going to have to be an enormous surge of interest in the RHI to meet government targets."

Rural dwellers are often oil heating users living in properties that are difficult to improve. With rural areas also containing a higher proportion of people living in fuel poverty, the very people who most need help to upgrade and improve their home's energy efficiency are effectively prevented from accessing the RHI because the upfront cost is unaffordable.

"What the country needs is a simple, accessible scheme which consumers can really get to grips with. We already know that a boiler scrappage scheme works as a similar initiative in 2010 saw 120,000 old, inefficient boilers replaced."



Jeremy Hawksley (top) and Martyn Bridges – make calls for a boiler scrappage scheme and speak of the about turn on oil-fired boilers in new build homes

Oil-fired boilers continue to be installed in new homes

"We certainly welcome the decision to not prohibit the installation of gas or oil-fired boilers in new domestic properties," said Martyn Bridges, director of marketing and technical support at boiler manufacturer Worcester, Bosch Group.

Martyn was commenting on the disappointment surrounding the Queen's speech on zero carbon homes and the criticism of the alleged 'watering down' of the zero carbon homes targets.



"While there's no doubt the revised zero carbon targets themselves are a climb down, they're at least more realistic than those set before the recession – particularly given that renewables simply haven't taken off in the way we would have liked.

"Despite its billing as the future of efficient domestic heating, the heat pump is a concept most UK homeowners are yet to embrace. Ultimately, a properly controlled boiler is far more effective and efficient than a poorly-used heat pump.

"The impracticality and the additional cost of equipping all new homes with a whole host of renewable technologies risked burdening house builders with too many hurdles to overcome," added Martyn.



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Downstream Oil Distribution Forum new appointment

Having spent 28 years in the oil industry with Texaco, Chevron and Valero, Peter Oakford has been appointed as the new chair of the UK Downstream Oil Distribution Forum (DODF). Peter, who took up the post on 1st September, takes over from former colleague Brian Worrall, now director of corporate affairs at Certas Energy.

Broad experience

Peter's career has involved many aspects of the oil industry – having managed international operations, new market entries, retail operations and terminals & distribution networks as well as overseeing upstream ventures in Eastern Europe, his experience is broad. Fifteen of the 28 years were spent working internationally where one of his most challenging roles was setting up a distribution network in Poland to support downstream market entry.

Prior to his first official DODF meeting last month, Fuel Oil News spoke to Peter who was looking forward to hearing the views of DODF members and to taking on board their thoughts as to future development and plans.

DODF members consist of government bodies, large distribution companies, wholesalers and trade associations including UKPIA, the Downstream Fuel Association, the Petrol Retailers Association, the Road Haulage Association, the SQA, which manages the Petroleum Driver Passport scheme, and the unions. Fuel Oil News asked about the involvement of the latter.

"The unions are very helpful," said Peter. "Whilst we in the industry see what can go wrong from a process point of view, the unions better

see what can go wrong from a driver's perspective. It's fantastic to have them on board to achieve our common goal – the safety of every single person involved in the distribution and receipt of a volatile product."

Health and safety is DODF's key focus. "We must ensure that all fuel deliveries are conducted in the safest possible way from delivery to receipt at any given point." In this Peter includes everybody down to the public on the forecourt where he believes more safety education is needed.

PDP success

DODF was instrumental in setting up the Petroleum Driver Passport (PDP) scheme for which 2000 passports had been issued by August.

"We're delighted with the PDP scheme's successful implementation," said Peter. "The whole industry has united behind this voluntary scheme which comes into effect in January 2015. With UK terminals agreeing to participate, all drivers entering a terminal will need to be in possession of a PDP. It's been so good to see everyone uniting behind a common cause.

"Managing the PDP scheme longer term and discussions as to how we can take it forward will certainly be on the agenda for our first meeting," added Peter.



New chair Peter Oakford is 'delighted with the Petroleum Driver Passport scheme's successful implementation'

Changes at FPS EXPO 2015

Showcasing the latest advances in oil distribution technology and with an exhibition spread over 5 halls, next year's FPS EXPO will take place in Harrogate on 22-23 April.

As the show comes to a close on the opening day there will be a new networking drinks reception for visitors and exhibitors whilst the gala dinner, usually held after the second day, will be moving to another time in the year.

Awards for *Driver of the Year* and *Depot of the Year* will be presented at the winner's depots in March and June 2015 respectively by the sponsors and Mark Askew, chief executive of the Federation of Petroleum Suppliers.

Over 70% of the available floor space is

already booked for next year's event which marks the exhibition's 35th year. Regular exhibitors and those returning for a second year will be joined by first time exhibitors Tankquip, KDC Contractors Ltd and Energy Trading Hub.

"Cost savings will no doubt dominate the agenda for those attending the exhibition," said Dawn Shakespeare, marketing & events manager and organiser of the exhibition. "Visitors will be able to see various innovative features from industry renowned exhibitors demonstrating the latest technological developments."

In 2016 FPS EXPO will move to Liverpool's new exhibition centre, the ACC, where it will stay for three years. www.fpsshow.co.uk

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Portland market report

A REFINERY - IT'S JUST A GIANT EFFIN KETTLE INIT

October update

It was 20 years ago this autumn that a fresh-faced Portland started his working career at the now sadly closed Coryton refinery. Very little in early life prepares you for the world of work and in Portland's case, absolutely nothing had prepared him for the world of work in south Essex. A hitherto quiet and provincial existence was to be suddenly and entirely annihilated by the brash Essex girls and boys of Tilbury, Rainham and Basildon. In fact the first conversation that Portland had back in September 1994 was with a refinery scaffolder – a man who had the astonishing ability of not only placing profanities between words but also within them. However, that first conversation made a lasting impression, for it was the scaffolder who most effectively summarised how a refinery worked; *"it's just a giant effin kettle init"* he said, and that indeed is what refineries were in the 1990s and pretty much what they remain 20 years later.

Every single refinery in the world has a Crude Distillation Unit (CDU) and into this unit is pumped crude oil where it is heated and boiled – just like a "giant effin kettle". Those who paid some attention in chemistry lessons may remember that liquid mixtures will separate into their component parts when they are heated and this is what happens to oil, which in its crude form is a latent mixture of all the different grades of fuel (petrol, diesel etc) that a refinery produces. As the temperature inside the Kettle (CDU) increases, the lighter products rise to the top, whilst heavier products separate and sink to the bottom.

The king of the refinery

So at the top of the Kettle (which is actually a heated steel column), we have the products with the lowest boiling points (ie, they boil first at "lower" temperatures), such as liquid petroleum gases (propane and butane), gasolines and naphthas (used in the petrochemical industry). Then we have the heavier products with higher boiling points, such as kerosenes (jet fuel) and distillates (diesel and heating oil). And the process continues all

the way down the column with residual fuels (fuel oils for ships and power stations) coming next, followed by bitumen (for roads), base oils (lubricants) and various special products and waxes at the bottom. Of course most of the products typically have to be treated further to meet legislative requirements (octane boosting, sulphur removal, biofuel blending, odour neutralisation etc, etc, etc – the list is long!) and these extra processes add massive complexity to a refinery. But the Kettle is always *King of the Refinery* and all other units depend upon it.

Different types of crude that go into the Kettle generate different product yields and this affects the price of crude. For example a sweet (North Sea) crude will produce a high yield (>50%) of light-end products (gasolines, naphthas, jet fuels) and these grades typically sell for higher values, meaning that the refinery can generate high income without significant manufacturing complexity (= cost). On the other hand, a heavy and sour crude (Saudi) might only produce 10-15% of light-end products, which means significant further processing is required elsewhere on the refinery to produce the light-ends that the market requires. This obviously pushes manufacturing costs up, which in turn means that sour crudes have to be discounted versus the sweeter crudes on the market.

Poor strategic decisions in the 80s and 90s

AN INDUSTRIAL
MONUMENT ON A SCALE
THAT IS DIFFICULT TO
DESCRIBE UNTIL YOU
EXPERIENCE IT IN THE
FLESH/STEEL

As we know from previous Portland Reports, refineries in Europe are still stuck in a dreadful mire of buying high priced crude versus selling products at low margins and more specifically, they are faced with over supply of gasoline

versus decreasing demand. Much of this was due to poor strategic decisions in the 1980s and 90s and because of this many refineries are expected to close over the next 5-10 years. As we know, this should (but rarely does) worry UK and European consumers who perhaps need reminding that crude oil has absolutely no value nor use if it cannot be refined.

Furthermore to visit a refinery is to visit an industrial monument on a scale that is difficult to describe until you experience it "in the flesh/steel". In its heyday, Coryton was daily dispatching 500 road tankers, 10 – 12 trains, 6 ships and 20m litres of refined product down the United Kingdom Oil Pipeline. It had 150 storage tanks (the biggest of which held 100m litres) and produced about 27.5m litres of fuel per day. That's circa 19,000 litres per minute if you prefer – not bad for a "giant effin kettle"...



For more pricing
information, see
page 26

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



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A tanker for all seasons

WHEN OKEHAMPTON-BASED MOORLAND FUELS DECIDED TO ADD A NEW TANKER TO ITS FLEET, THE COMPANY THOUGHT LONG AND HARD ABOUT WHAT IMAGERY TO USE

“We wanted a design that celebrated the Dartmoor area and also showcased our commitment to delivering fuel whatever the weather,” explained managing director Ben More. “Because our tankers make so many regular deliveries throughout the local area, they’re considered to be part of the landscape.”

The photographs used on the tanker’s eye catching design were found in the work of Alex Nail, a landscape photographer who grew up on the edge of Dartmoor. On one side of the tank is Staple Tor covered in snow whilst Watern Tor in summer is on the other side. An iconic Dartmoor pony gallops across the tanker’s rear.

Moorland recently commissioned photographer Guy Richardson, who specialises in Dartmoor landscape photography, to take a stunning series of photographs of the tanker, as seen here and on the front cover.



The tanker is the first Euro 6 vehicle that MAN has produced for the south west market. With a short wheelbase and a Stokota tank, the vehicle was designed and built by Maine Tankers. It has a 13,000 litre capacity and is equipped with the latest meter technology for efficiency and accuracy



Engaging the local community and being part of the landscape

Before embarking on a series of agricultural shows in August, the company used Facebook to ask customers what made them stop at a trade stand. With the opportunity to have a photograph taken in a tanker cab and the availability of food being among the answers, the artful tanker took pride of place at the Okehampton, Chagford and Holsworthy shows where the company also ran a Name the Tanker competition. Whilst deciding on a name, visitors were invited to relax with refreshments.

This family business likes to engage the younger members of its customers’ families too. This year its annual Christmas card competition, launched at the shows, is in keeping with the tanker’s landscape theme, entrants were given a template of the new tanker to which they can add colourful designs and scenery around a Christmas theme. (Fuel Oil News looks forward to seeing the winning entry which will be rewarded with a family day out and a donation to the charity of their choice.)

Moorland Fuels began supplying lubricants 15 years ago. An independent distributor delivering heating oil, gas oil and derv for homes, farms and industry; tank replacements, boiler servicing and coal are among the services offered. www.moorlandfuels.com

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ON THE NEXT FEW PAGES, SOFTWARE PROVIDERS INFORM AS TO NEW ADDITIONS AND LATEST PROJECTS, ALL DESIGNED TO EASE THE PROBLEMS OF THOSE OPERATING IN THE WORLD OF FUEL OIL DISTRIBUTION

Software from CODAS that grows with the user

Through a combination of regular new releases and monthly Service Pack updates for existing versions, CODAS continually evolves to meet the ever-changing demands of the oil industry and the expanding ambitions of distributors as they seek new markets and new ways of doing business.

CODAS supports over 100 interfaces to 3rd party products to automate the export, import and processing of business-critical data. The count includes instant quote and order websites, on-truck computing solutions, tank monitoring equipment, terminal automation systems, fuel card agencies, banks, print bureaux and payment card service providers.

Innate functionality, combined with outstanding interface support, makes the system exceptionally versatile and flexible. As a result, it is in use at half of the UK mainland's Top 20 distributors and at four of the Republic of Ireland's Top 10 (as defined by the latest Fuel Oil News rankings).

However, this does not mean that the system is only suitable for larger companies. Over a third of CODAS' client base comprises distributors with fewer than ten users, and all of its functionality is available whatever the size of the operation.

The modular nature of the software means that it grows with the user: it is specifically designed to be neither overly complex for the smaller distributor, nor restrictive to growth for the expanding enterprise. A wealth of configurable options allows it to be tailored specifically to the needs of the individual client.

Over 35 years' experience of discovering and fulfilling the needs of the oil and LPG industries provides CDS with an unrivalled perspective into the requirements of the modern distributor. See also opposite page.

www.codas.co.uk

Delivering productive software

EA PROJECTS HAS SUPPLIED A NUMBER OF SOFTWARE UPGRADES TO THE TERMINAL AUTOMATION SYSTEMS (TAS) INSTALLED AT MURCO'S UK TERMINALS

Late last year EA Projects was involved in the design and implementation of a bio-blending software module to facilitate the rack blending of bio-ethanol. User configurable blend recipes can be automatically uploaded into the batch controllers based on the customer profile. Blending equipment is monitored to ensure that correct blend ratios are delivered with the user able to rectify blend errors in the event of equipment failure. Ethanol receipts are recorded and the system handles the product's stock accounting. The new module is fully integrated into the TAS, also managed by EAP, which have been up and running since September 2013.

Athenaeum – a new development in the EA Projects automation platform – has been installed to collect data from all Murco terminals. This web-based data warehousing system captures and stores all bills of lading, invoices and reports as created, storing them off site at two separate locations. It records two copies of each record for up to 10 years worth of data with all data accessible via a web browser where it may be viewed in the form of the original document. This not only meets HMRC's legal requirements for terminals but also provides a dual redundant disaster recovery system.

In January, EA Projects also added a new loading bay onto the automation system at Westerleigh terminal.

Speaking about this work, operations manager Daniel Brain said: "We've worked with EA Projects for a number of years and have a long relationship with the developers who've grown with us and our business. They've consistently delivered on our automation system developments whilst ensuring customer flexibility is built into their offering. We look forward to continuing this very productive relationship." See also page 27. www.ea-projects.com



Murco recently commissioned EA Projects to install a number of software updates and the new Athenaeum system at its terminals

Improving the customer experience

TODAY'S CUSTOMERS EXPECT MUCH MORE FROM IT SYSTEMS – THEIRS AND THEIR SUPPLIERS

At Integer Micro Systems (IMS), this design philosophy drives product development and is evident in the Tankerbase Sapphire fuel management system which boasts many industry leading initiatives including the fully integrated ePOD on-truck computer system.

The ePOD system has the tightest integration available to a back office system when interfaced to the Sapphire fuel management suite. The ePOD system provides near real-time information to back office staff including vehicle on-board stock, customer POD signature for completed deliveries and satellite *geotag* co-ordinates with satellite time stamp for each delivery. The ePOD system also produces a full door step Invoice when appropriate.

Kinch Fuels recently took the plunge and implemented the IMS ePOD on-truck computer system interfacing it to their existing Tankerbase Sapphire fuel management suite. Roy Kinch explains the benefits of installing the system: "With the delivery note acting as a doorstep invoice, customers are able to pay immediately, improving cash flow and removing the need to send an invoice saving both time and money."

Improving the customer experience is key; one way to address this is to notify the customer of their expected delivery time slot and litre price prior to delivery with an automated SMS text alert sent to the customer's mobile phone.

For those fuel suppliers looking to expand their business, the latest



version of Sapphire Prospex CRM has been written specifically for the fuel market and provides a fully featured customer contact and relationship management platform to ensure retention of valued customers while at the same time winning new business. When interfaced to the Sapphire Management Dashboard, sales related information including product, quantity, margin and quote to sales success rate are displayed in an interactive dashboard, with drill down capability to display productivity and profitability by depot and customer service representative.

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The key differentiator between Fuelsoft and other software developers is that Fuelsoft is now fully integrated into Microsoft Dynamics Customer Relationship Management (CRM) software. The CRM application will provide a list of activities for sales operators to follow up on non-buyers and buyers.

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It is the best way to manage the effectiveness of a sales team, monitoring activity and sales pipelines.

“All new customers buying Fuelsoft are buying the software because of the power and flexibility of the CRM application,” says David Kingsman, managing director at Fuelsoft. “This is integrated into Fuelsoft and they can see that effective use of the software will increase sales. New customers are leaving other software providers and switching to Fuelsoft. It’s good to know that the time and money we’ve spent developing the interface over the past two years is paying dividends. We’ve now set up our own dedicated CRM support division and use the product internally for handling all our own support calls. It is the way forward, it’s the Fuelsoft difference.” See also page 14.

Please call Fuelsoft for a demonstration on **0845 557 6496**



Mark Nolan, Nolan Oils with David Kingsman on the Fuelsoft stand at this year's FPS Expo



Total stock reconciliation

One problem faced by fuel storage companies is how to account for an ever changing quantity of stock. Companies need to know what they have received, what has been despatched and what is currently held in their tanks. They also need to identify if any stock is missing and if so, how and why?

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The future of forecourt retail convenience

ONE OF THE UK'S FASTEST GROWING COMPANIES, WITH NEARLY 180 RETAIL FORECOURT SITES, EURO GARAGES LOOKS SET TO TURN OVER £1 BILLION NEXT YEAR. LIZ BOARDMAN SPOKE TO COMMERCIAL DIRECTOR ILYAS MUNSHI

The successful Blackburn-based company is headed up by the Issa brothers, Zuber – chief executive and Mohsin – managing director and employs just under 2,500 employees.

Described as “serial entrepreneurs” by commercial director, Ilyas Munshi, there has always been a keen family interest in owning and operating commercial businesses in various sectors. Over the years the Issa family has been involved and invested in operating a chain of retail kiosks in shopping malls as well as clothing manufacture and plastics businesses.

The transition to retail fuel convenience came about in 2001 when Zuber wanted to move away from the traditional forecourt – kiosk-style offering and explore providing a broader shop offer to forecourt consumers. At the time the family owned a single petrol forecourt in Bury and the decision was made to undertake a complete knock down and rebuild. The investment resulted in a larger retail shop and additional fuel pumps. As a result, shop sales tripled and the Issa brothers recognised the real potential for the forecourt retail sector.

At the time, BP were also actively divesting their company estate and identifying independent forecourt operators to work with. The Issa brothers were keen to grow the Euro Garages portfolio and began an extensive acquisition programme which gave them approximately 90 sites.

At the onset of 2013, Euro Garages secured 45 sites from Esso across the North of England and Wales with a further 48 sites in the Midlands and East of England being successfully transferred during May 2014.

FOR MOST OF OUR CUSTOMERS, FUEL IS NOT THE PRIMARY DRIVER

Changing the consumer experience

Central to the company's offering are strategic partnerships with major global brands such as SPAR, Starbucks, Subway, Greggs and Burger King. Having chalked up its 50th Subway store at the beginning of July, Euro Garages plans to reach the 100 milestone by the end of 2016.

“Our vision is to offer world class fuel,

convenience shop retail, food and drink – it's a simple business model and one which differentiates our site proposition from the average forecourt offer accessed by our customers,” explains Ilyas. The company is currently ranked 7th in the Grocer's top 50 independent grocery retailers in the UK.

“Five to six years ago 60% of our gross profit came from fuel and 40% from non-fuel products. Now this has switched and non-fuel products and services account for 60% of our gross profit with fuel being 40%, demonstrating a very noticeable shift in consumer buying habits and justifying the extra investment in this side of the business.

“At Euro Garages we have our ears close to the ground on consumer habits and recently brokered the deal with Greggs on the back of a Palmer and Harvey research study which revealed that bakery products were top of the forecourt consumer wish list.”

“For most of our customers, fuel is not the primary driver,” continues Ilyas. “We're not using fuel as a loss leader but as an opportunity to sell something else. Fuel margins are tight so we concentrate instead *on filling the tanks of people*. We have a big emphasis on changing the consumer experience and have as standard, ample parking, well lit forecourts, seating areas, clean toilets, free ATMs and an open door policy to ensure that customers feel safer at night. It's all in the detail!

Location, location, location

“The key to our success is to acquire/build sites in good locations,” Ilyas told Fuel Oil News. “We have and would walk away from deals where the location wasn't right. The ideal location for us is in close proximity to a major road network, office/commercial properties and residential areas. The combination of these three ingredients makes a successful forecourt.”

He added, “For consumers, forecourt service stations were traditionally recognised for making distress purchases. We wanted to challenge this perception and completely enhance consumer experience and make them want to go to the site rather than simply having to.”

“With regard to the motorway network, although the company own and operate Rivington Services on the M61, there are no immediate plans to invest in further Motorway



“We're not using fuel as a loss leader but as an opportunity to sell something else,” says commercial director Ilyas Munshi

Service Areas (MSAs). “We don't actively look for them,” says Ilyas “but if the right opportunity came along we would consider it. At Rivington we operated the forecourt whilst another company ran the services. One of us had to buy the other out so that the whole offering could be properly developed.”

Following a £12 million investment the site was completely transformed. “We wanted to make it like an airport experience for commuting customers – ample parking, large food court with global brands, games area, facilities for the motorway traveller including showers, an on-site hotel to name a few. There is now a greater convenience offering, fuels for both trucks and cars and enhanced parking. We even hosted David Cameron on his tour of Lancashire last year”

Investing in people

People are important to Euro Garages. The company invests both time and money in nurturing staff and making them feel valued. “We provide a number of staff training programmes in areas such as customer service and also offer an accredited qualification –



Winners of Forecourt Trader of the year 2013, Euro Garages' Calder Park site in Wakefield was described as a site with the 'wow factor' offering retail fuel and convenience at its best; the company also took the title in 2011

excellence in forecourt retail management," explains Ilyas. "For our staff it's about having a long-term career rather than just a job. There are vertical and horizontal opportunities across all of our businesses and we like to empower our staff, giving them control over stock selection and promotions."

The future of retail

With a heavy concentration of sites in the North West, North East, Yorkshire, Midlands and Wales, Euro Garages is looking further afield to national expansion. The company is currently developing their first new-to-industry site in Scotland and is already looking at potential sites in the south of England.

"We know that our business model produces results and we can flexibly scale up and replicate our brand offers across the country. Our model operates in a tight market and taking our existing partner brands down south will deliver fantastic returns to all stakeholders involved," says Ilyas.

Development of Euro Garages own branded products and services however are not on the immediate horizon. "We believe our success lies in delivering and executing effectively our partner brand offers. With our scale, many people say why don't you do your own fuel, coffee offer or fast-food concession but we firmly believe in investing in global brands that have effective offers. However, we continue to explore new products and services to extend the consumer experience on our forecourts."

Looking ahead the company sees continuing development and growth of the non-fuel offering as pivotal for the sector. Fundamentally, customer engagement and education is going to be critical. "We're already investigating ways to better promote this side of the business and make customers more aware of special deals across all partner brands. In days gone by special promotions were advertised on a screen behind the cashier but for customers already in a queue, this was too

late and the opportunity missed. To address this, we're looking at smart phone technology and LED screens on the fuel pumps.

Loyalty schemes are another area of interest. "We're actively looking at how we operate loyalty schemes and make them attractive to customers. We're looking to extend our existing click and collect scheme so consumers can order and pick up essentials."

AIM – Acquire, Invest and Manage

For Ilyas the very root of the company's success lies in its mantra – AIM which stands for Acquire, Invest and Manage. These values are very much in evidence across the whole business and look set to thrust Euro Garages to the next level. www.eurogarages.com

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Strategic oil reserves terminal to be sold

THE WHIDDY ISLAND OIL TERMINAL IN BANTRY BAY, WHICH HAS A STORAGE CAPACITY OF 7.5 MILLION TONNES, IS TO BE SOLD TO US ENERGY STARTUP COMPANY ZENITH ENERGY

The deal, which is expected to be finalised by the end of this year, was brokered between current owners Phillips 66 and Zenith Energy. It is understood that the terminal, which has seen considerable investment in recent years, will continue to operate on a commercial basis by its new owners.

Zenith Energy

Zenith Energy is run by a former executive from Kinder Morgan, one of the foremost US oil logistics companies which has long experience in owning and operating pipelines and terminals.

To enable Zenith to establish a scaleable worldwide terminal building programme, the company recently received a \$600m injection from Warburg Pincus, a New York private equity firm which has invested heavily in energy.

The acquisition of the Whiddy Island oil terminal will give Zenith a foothold in Europe with the ownership of an established facility.

The Department of Energy Communications, Energy and Natural Resources has said that the Bantry terminal will “remain an important element of Irish oil infrastructure, regardless of its owners.”

The facility was sold by the state to Tosco in 2001 with the proviso that it would remain in operation for at least 15 years from the sale; Phillips 66 subsequently bought the facility, the obligations and guarantees on the terminal and the Whitegate refinery expire in 2016.

Regarded as one of Europe’s best fuel storage facilities, the terminal currently employs 30 people directly and supports a further 100 support or contract jobs. It was a major contributor in the €1.3m in harbour dues collected by Bantry Harbour Commissioners in 2012.

90 days of oil reserves

The sale of the Bantry Bay facility, which holds a third of Ireland’s strategic oil reserves, will not impact on the existing contract for National Oil Reserves Agency (Nora) stocks held at that site, according to the Department of Energy Communications, Energy and Natural Resources.

Nora holds stocks at Whitegate, Tarbert, Co Kerry, Ringsend, Dublin, and Kilroot, Co Antrim with some stocks held in the UK.

Ireland is required under EU and IEA obligations to hold 90 days of oil reserves.



Delivering 40% of the Republic’s kerosene

FOLLOWING THE APPOINTMENT EARLIER THIS YEAR OF NICK HAYES AS THE FEDERATION OF PETROLEUM SUPPLIERS’ NEW IRELAND REPRESENTATIVE, THE FPS NOW HAS 18 MEMBERS IN THE REPUBLIC AND HOPES TO FURTHER INCREASE MEMBERSHIP

New members include Flynn Fuels, East Cork Oil, DCC Ireland, J&E Hughes Fuel Oil, Michael O’Reilly Oil, West Cork Oil, Sweeney Oil, M&J Oils, McGuckian Oils, Fenmack-McMahon Oil, and Peadar O’Keefe Oil. The FPS reports that its members are now delivering approximately 40% of the Republic of Ireland’s kerosene requirements.

Sponsored by OAMPS, an inaugural FPS Republic of Ireland members’ meeting with speakers from the Road Safety Agency and Customs & Revenue was held in Portlaoise last month. FPS reports that it is ‘developing good links with government and key stakeholders to help move the industry forward in a positive way’.

Chief executive, Mark Askew said: “We’re delighted with the success we’ve had in gaining new members in the Republic. The meeting was the perfect opportunity to receive feedback from our members regarding what’s impacting their businesses, allowing us all to identify key items and to develop strategies as to how we can help our members.

“Through these relationships we’re able to provide members with a collective voice for the industry at every level, and offer advice on meeting legislation.”

Mark Askew of the Federation of Petroleum Suppliers which aims to increase membership levels and ‘to meet the growing needs of FPS members across the whole of Ireland’



BigOil powered by Vianet

FOR OVER A DECADE, BIGOIL HAS UNLOCKED MARKET DATA WHICH WAS PREVIOUSLY THE PRESERVE OF MULTINATIONAL OIL COMPANIES AND PROVIDED THIS TO ITS CUSTOMERS

BigOil allows its customers – petrol retailers and other fuel related companies – to receive daily market data from Platts for fuel products such as unleaded, diesel, kerosene and jet fuel. By receiving this information on a daily basis, not only are customers made aware of the market’s volatility, but more importantly it enables them to have a more informed approach with regards to buying and pricing decisions.

In 2013, BigOil joined forces with Vianet Fuel Solutions. With a clear vision and a fresh approach, Vianet has fuelled major development of the BigOil web portal. The web portal now contains a vast amount of historical data allowing customers to trend weekly, monthly and yearly prices of fuel products

along with the raw dollar per tonne prices of fuel grade oil. All information can be displayed and downloaded in easy to use reports.

BigOil Powered by Vianet now offers customers a ‘Premium’ version of its standard daily report. This Premium Daily Platts report includes fuel grade oil prices in dollars per tonne such as biodiesel, gasoline and ethanol etc. The report also contains exchange rate information of all major exchange rate outlets such as Financial Times, European Central Bank and Forex etc. The report also expands on the merged market prices to include prices using every exchange rate.

The Premium Daily Platts report can be obtained in a variety of different ways such as email, accessed through the BigOil web



portal and a soon to be available app for IOS & android smart phones.

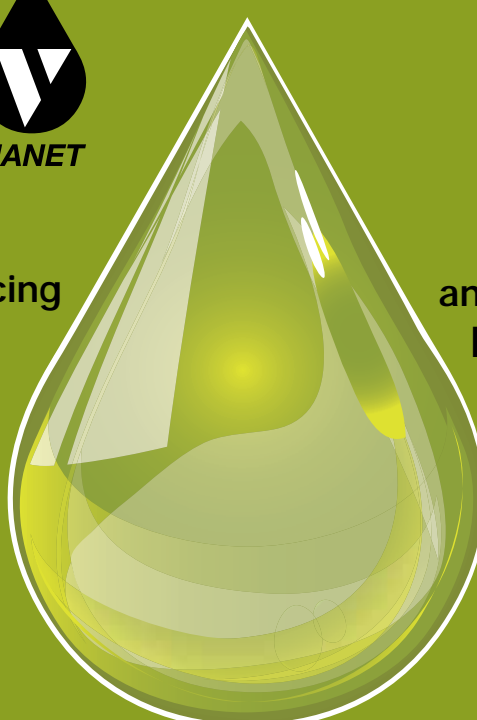
Even though BigOil is seen as a market leader in the industry,

Vianet is continuing its vision and constantly developing the BigOil web portal to both meet and exceed customer expectations.



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THE WORLD OF LUBRICANTS

THE WORLDWIDE LUBRICANTS MARKET AMOUNTED TO 35.3 MILLION TONNES (MT) IN 2013 – MARGINALLY BELOW WHERE IT WAS AT THE START OF THE CURRENT MILLENNIUM AT 37 MILLION MT

Lubricants represent about 0.8% of the global oil market with two regions accounting for over half of total lubricants demand – the fast growing Asia Pacific takes one third with the USA accounting for just over 20% of the market.

International majors still dominate the market

The lubricants market continues to be dominated by international, integrated oil companies. At circa 13%, Shell is the market leader closely followed by ExxonMobil. Traditionally named after sea shells, Shell's lubricants have names such as Rotella, Rimula and Helix. The Mobil range has a long established reputation across a wide range of applications whilst BP's Castrol range has always enjoyed strong brand credentials.

Unlike their fuels operations which have seen significant rationalisation in global presence, the international majors have maintained their footprint in the worldwide lubricants market.

Lubricants – source, production and distribution

Lubricants typically comprise 90%+ base oil with the balance consisting of an additive to achieve the requisite performance characteristic(s) associated with the finished lubricant. Base oils are classified into 5 main groups – groups 1-3 are derived from mineral oil while 4 & 5 are synthetic – with classification done according to features such as saturate content, sulphur and viscosity. Crude oils with a high paraffinic content are preferred as a feedstock for production of mineral oils through the refining process.

Synthetic lubricants emerged in the latter part of the 20th century. Produced by chemical synthesis rather than via the crude oil refining process, they produce a compound with gives planned and predictable properties. Using the chemical process Fischer-Tropsch, originally developed by Germany in World War 2 when access to crude oil was very limited, raw materials like methane, carbon monoxide and carbon dioxide are used. While more expensive than lubricants derived from mineral oil,



Recently appointed as quality assurance manager at British oil blender Morris Lubricants, Phil Saunders is in charge of making sure that every product leaving the Shrewsbury factory is of the highest quality. Phil said: "Whether it's an incoming raw material or finished product, numerous industrial test methods are carried out in accordance with internationally recognised bodies to ensure every product passes rigorous testing."

synthetics enable superior performance under temperature extremes due to a higher viscosity index, better chemical stability and reduced losses from evaporation.

Blenders are a key element in many a country's lubricants supply chain. These independent companies – several can trace their origins back to the 19th century – take base oil and blend into a range of finished lubricants before marketing and distributing; Fuchs, Morris and GB are among the many names. The industry is backed by strong trade associations – United Kingdom Lubricants' Association (UKLA), the Union of the European Lubricants Industry (UEIL – Europe) and the Independent Lubricant Manufacturers' Association in the USA.

Demand decline

As a result of technological advances, there has been a steady and progressive decline in lubricants demand in developed economies such as the UK.

Advances in the lubricants themselves and in their end usage such as in the automotive sector where car engines that once required lubricant replacement intervals of under 5,000 miles, now only need replacing after 20,000 miles plus.

At the start of the new millennium, UK demand was around 800,000 mt/year by 2007 it was just under 700,000 mt. The 2008-2013 recession accelerated the decline with demand in 2013 at 418,000mt which is just over 50% of what it was in 2000.

With the recent cessation of base oil manufacture at Stanlow, the only UK refinery now producing lubricant base oils is Fawley which has an annual capacity of around 400,000 mt representing 3% of total output.

The biggest lubricants consumers are the industrial and automotive sectors; the former accounts for around 50% of demand with the latter, which includes automotive related gear oils & transmissions, accounting for 45%.

As with the wider oil products market, it is expected that whilst the future will see continued growth in lubricant requirements in developing economies, usage in developed economies will show further decline, albeit at a reduced rate than that experienced since 2000.

Integrated, major international oil companies are likely to maintain their dominant market position while independent blenders are expected to remain a vital presence in the supply chain, helping to ensure that market requirements, and changes thereto, are fully satisfied.



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The company is managed by a team of experienced oil and technology professionals and has a proven track record in combining accurate market analysis with reliable intraday price assessments and cutting edge technologies. OMJ is a Platts licensed distributor for UKI, a Dow Jones partner, and a licensed vendor of Financial Times forex prices and ICE Futures Europe oil prices.

Solutions for oil buyers and traders

The OMJ provides a wide range of key oil and forex services to oil professionals, especially those distributors operating in the UK and Ireland. Key services include real time intraday prices for Rotterdam cargoes of refined products, live and delayed London and New York futures prices, closing Platts prices in a range of currency/units, along with live and settlement foreign exchange prices.

OMJ also provides focused news, comment and analysis on what is driving prices and moving markets along with 24-hour Dow Jones energy news.

Ian Moore, director of markets, says that OMJ provides considerable advantages to clients because the OMJ system can be specifically customised in line with client requirements to ensure the provision of the

precise oil prices and information relevant to their business. In addition, OMJ market analysis provides clients with a better understanding of price trends and enables them to make more advantageous trading decisions.

An oil distributor in south west England recently reported: "The OMJ has been of terrific help to us, a small company far from the centre in a very volatile phase. We now have at our fingertips accurate, up-to-date information which is absolutely crucial to get the maximum benefit from live pricing, which has significantly helped our bottom line in what can best be described as interesting times."

Innovative systems

The Oil Market Journal is continually developing new products and services for the downstream oil market. Earlier this year the Journal launched the OMJ Wallboard which, says Iain Magee, OMJ director of technology, is proving very popular with oil distributors in both the UK and Ireland. The Wallboard provides live oil and foreign exchange prices, along with Dow Jones energy news, in a clear format for large screens on oil distributor sales floors, enabling office-wide visibility.

With more than 500 live pricing product options available on the OMJ Wallboard, each screen can be customised in line with client requirements. Live prices can be viewed in dollars per tonne, sterling pence per litre and euro cents per litre.

For a free trial of OMJ, go to www.the-omj.com/fueloilnews

Market intelligence can save £200k pa

Most oil distributors understand that breaking oil market intelligence and time sensitive information can have a dramatic effect on their company's bottom line says Fuel Prices Online.

Decision-makers involved in purchases, pricing, risk management and inventory positions will usually use end of day Platts assessment for pricing, but by the time these figures are published the market and the price of oil has already moved says Basil Shrourou, Fuel Prices Online.

Turn to page 24 for details of the savings.



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Market intelligence can save £200k pa Cont/d from page 23

Real-time market intelligence alerts the decision-maker before the market moves, allowing oil distributors to buy before the price goes up or to hold off for the market to come down. On a full load of 30,000 litres, this could be as much as £300+, says the company.

"If we look at this saving across the year, an average 20 million litre distributor takes 666 x 30,000ltr loads, if multiplied by the £300 average saving this is just under £200,000 per annum off the bottom line," says Basil Shrourou.

"The launch of Fuel Prices Online's big three developments have allowed our clients to harness the power of real-time market intelligence

through: the industry's fastest and most feature-rich ticker; the market's first and most downloaded mobile app; and the most visually impressive user-centred dashboard," he adds.

To experience a complementary demonstration of the company's market intelligence products, please email basil@fuelpricesonline.com.

100+ years of market data and analysis

Since 1909, Platts has provided information and insights to help customers make sound trading and business decisions.

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Platts publishes news, commentary, fundamental market data and analysis, and thousands of daily price assessments which are widely used as benchmarks in the physical and futures markets. Products and services include real-time news and price information; market reports and analytics; end-of-day market data; geospatial data and maps; conferences; and a weekly television program broadcast in the US and online.

Platts employs a staff of more than 1,000 and maintains a network of correspondents spanning the globe. It has offices in more than 15 key cities, including New York, Shanghai and Sao Paulo, and major energy centres such as Houston, Singapore and London, where Platts is based.

Platts regularly engages with customers and industry participants through forums, training sessions and one-on-one meetings as well as hosting many high-profile industry events.

Providing the wholesale benchmark

The world's largest independent energy news, analysis and price reporting agency, Argus Media uses a precise and transparent methodology to assess prices of fuels.

The international industry's confidence in the quality of Argus' reporting and ethical standards has led to increased use of its prices as benchmarks by major market participants in physical and swaps contracts. The company's price assessments for gasoline and biodiesel are the standard industry wholesale benchmarks in northwest Europe, with more and more usage in supply contracts to distributors and forecourt dealers.

Argus also monitors the gas oil market with daily price assessments on diesel, jet/kerosene and heating oil. www.argusmedia.com



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The new range of Maxol Turbosynth LSP Plus engine oils is the complete solution for mixed fleets. This range of dedicated HGV engine oils come fully approved by leading OEMs including Volvo Trucks, Renault Trucks and MAN Trucks and are developed for use in Euro IV, Euro V and Euro VI engines. Turbosynth LSP Plus engine oils cover such a vast range of vehicle makes and models that they can in essence service an entire mixed fleet. For more information contact Maxol Lubricants on **+353 (0) 1 806 0300**.

New transmission fluid for Mercedes

Morris Lubricants has developed Liquimatic DX14, a premium product which ensures efficient and effective gearshift under a variety of loads and operating conditions. The oil has been officially approved by Mercedes and is now recommended for the latest generation of Mercedes-Benz seven-speed rear wheel drive automatic gearboxes and all AMG models.

Three other Morris Lubricants products – the Lodexol DX90, Lodexol DX80, Lodexol HPS 75W-90 – have also received approval.

The transmission fluid, which is red in colour, ensures positive and continuous frictional control and a smooth, vibration free drive. It has a high level of thermal and oxidative stability and encourages reduced fluid loss due to low volatility.

Automotive product manager, Adrian Hill, says that the Liquimatic DX14 is a key addition to the firm's product portfolio, which is now more than 800 lines strong. www.morrislubricants.co.uk

NSF approved lubricants

Aztec Oils provides the largest range of NSF H1 (National Sanitation Foundation) approved lubricants, greases and aerosols in the UK and is one of the country's leading specialists in high performance lubricant manufacture and distribution.

The Derbyshire-based company has recently received NSF H1 certification for its new range of food grade aerosols including maintenance spray, lube oil, silicone lube, penetrating oil, white grease, chain spray and fast-drying solvent cleaner.

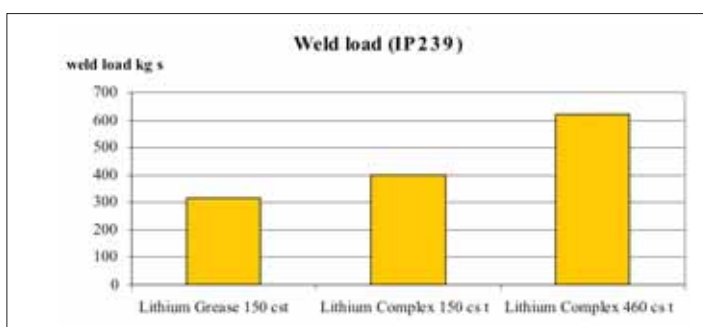
The aerosols, which can be used at any angle to lubricate, contain no CFCs and are available in either 300ML or 400ML sizes. Each aerosol is colour coded for easy product identification.

Aztec Oils manufacture and supply a comprehensive range of industrial, commercial, automotive and supplementary products.

www.aztecoils.co.uk

New extreme performance grease

Ironsides Lubricants has launched an extreme performance, high viscosity lithium complex grease suitable for applications running in arduous conditions where standard grades are not sufficient to cope with extra loads and difficult operating conditions.



Using new heavy grade base oils now available to produce greases with a base oil viscosity of 460cst or higher in their grease formulations has greatly benefited performance. Heavy base oil grades have a more synergistic effect and greater thickener interaction with greases based on lithium complex thickener types. This is effective within lithium complex thickeners more than any other soap type.

Four ball weld load testing has demonstrated an increase in weld load to greater than 620 kg. Another major benefit in addition to retaining a wide operating temperature range is good pump-ability with this type of thickener. (This trend has also been observed in mineral oil as well as PAO and PAG base oils). www.ironsideslubricants.co.uk

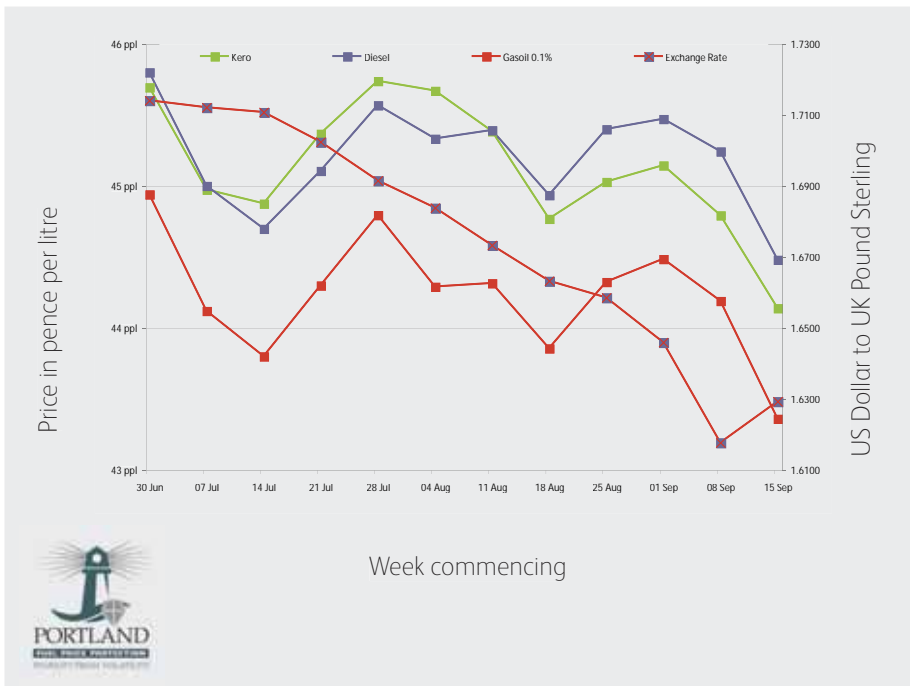
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Wholesale Price Movements: 19th August 2014 – 18th September 2014

	Kerosene	Diesel	Gasoil 0.1%
Average price	44.79	45.13	44.07
Average daily change	0.25	0.25	0.25
Current duty	0.00	57.95	11.14
Total	44.79	103.08	55.21

All prices in pence per litre



Highest price
45.53 ppl
Thu 04 Sep 14

Biggest up day
+0.60 ppl
Wed 03 Sep 14

Kerosene

Lowest price
43.55 ppl
Thu 18 Sep 14

Biggest down day
-0.89 ppl
Wed 10 Sep 14

Highest price
45.89 ppl
Tue 09 Sep 14

Biggest up day
+0.52 ppl
Wed 03 Sep 14

Diesel

Lowest price
43.84 ppl
Thu 18 Sep 14

Biggest down day
-0.85 ppl
Wed 10 Sep 14

Highest price
44.86 ppl
Thu 04 Sep 14

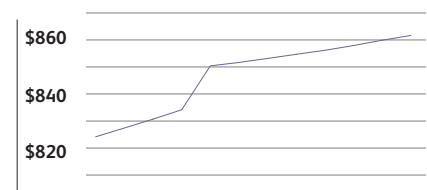
Biggest up day
+0.56 ppl
Wed 03 Sep 14

Gasoil 0.1%

Lowest price
42.67 ppl
Thu 18 Sep 14

Biggest down day
-0.84 ppl
Wed 10 Sep 14

Gasoil forward price
in US\$ per tonne



October 2014 – September 2015

The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Platts	45.52	56.02	104.20			
Scotland	47.08	58.75	105.26	53.73	62.38	108.88
North East	48.16	58.99	105.68	53.51	62.08	108.10
North West	47.88	59.16	105.79	51.43	61.43	107.43
Midlands	46.81	58.34	105.19	50.73	61.05	107.60
South East	47.10	58.39	105.18	51.63	61.16	107.11
South West	47.70	58.78	105.86	51.03	61.10	107.95
Northern Ireland	47.28	58.91	105.91	50.00	62.37	120.95
Republic of Ireland	67.58	72.36	111.13	82.00	85.00	113.50

The price totem figures are compiled from the results of a telephone survey of distributors carried out on 05/09/2014. Buying prices are ex-rack. Selling prices are for 1000 litres of kero, 2500 litres of gas oil and 5000 litres of ULSD (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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