

Fuel Oil News

MAY 2015



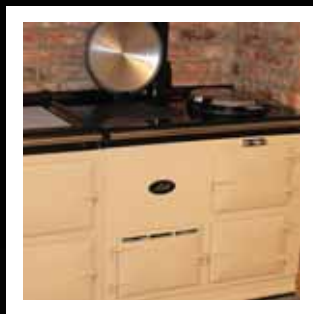
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Are MPs ready for some oil-fired action?

With our long term future energy security still hanging in the balance, the topic of energy was conspicuous by either its lack of prominence or complete absence from most manifestos prior to the race to number 10.

"Most parties probably filed energy under *too difficult*", said Neil Schofield, head of government affairs at Worcester Bosch whilst speaking on the occasion of the 10th anniversary of condensing boilers.

In stating that it would *get rid of the Department of Energy and Climate Change and repeal the Climate Change Act*, Ukip was among the parties that declared a slightly raised interest in energy.

Whilst getting rid of DECC would alienate those in the oil industry who have recently highlighted much improved working relationships with the government body, Ukip's other action may be welcomed by those in refining feeling the pinch from an Act that *'drives up costs, reduces competitiveness and hits jobs'*.

Should Ukip now be in power we will have a *'diverse energy market based on coal, nuclear, shale gas, conventional gas, oil, solar and hydro as well as other competitively priced renewables.'* The Green Party will be investing £35 billion in renewables and banning fracking; the Conservatives will continue to support fracking but ban onshore wind subsidies. Labour will be getting tough with energy companies and tackling climate change, the Liberal Democrats will be launching 5 green pledges and making energy saving a top infrastructure priority.

By the time you are reading this, the result of the general election will be known and depending on the party/parties in power you will be able to hazard a guess as to the no doubt eclectic energy policy that will be our lot for the next five years.

Whatever that policy, we must all hope that the newly elected MPs will heed the wise words of the Federation of Petroleum Suppliers and OFTEC on the subject of oil-fired heating – see page 7.

Fuel Oil News

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

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Rotterdam does the contango

LATE MARCH SAW THE ANNUAL STOCEXPO EVENT IN ROTTERDAM, NETHERLANDS. NEIL MADDEN, EDITOR OF BULK DISTRIBUTOR, REPORTS FROM THE EVENT

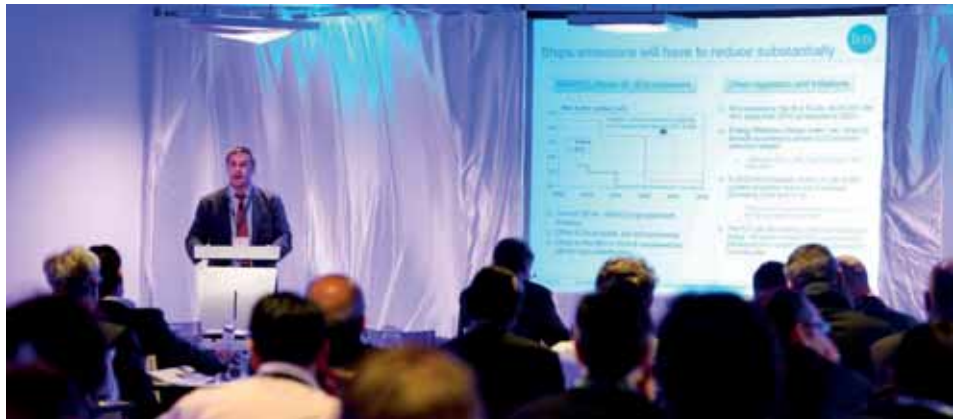
Since last year's show, oil prices have of course collapsed with significant impacts on the global storage market. A contango market, where spot prices have been lower than forward prices, was in play for several months. But, in recent weeks this has started to fade as prices across all benchmarks have recovered sooner than expected. Not surprisingly, this provided the context for much of the conference discussion in Rotterdam.

The oil price slump has provided temporary relief for European refineries, but the consensus among speakers was that this would not last. With high labour costs, elevated energy prices and stiff competition from the US, Middle East and Russia, European refineries have the odds set against them. Further capacity rationalisation is still required and likely to be witnessed over the next few years.

The impact on the European storage market

With respect to European storage, the contango may have boosted demand for floating tankage, but this is not having a big impact on expansion plans. Over 4 million cbm was built between 2011 and 2015, bringing the total product storage capacity to around 19 million cbm. Now, however, capacity additions have slowed markedly.

The Botlek Tank Terminal expansion in Rotterdam is the main project in the pipeline,



The recent changes in marine fuels were among the topics discussed at this year's StocExpo

but aside from this little else is going on. By 2016 Shtandart TT was planning to build a 3.2 million cbm terminal at Europoort West, Rotterdam, but Onur Capan, manager of downstream oil services at Wood Mackenzie said the analyst firm did not expect this to materialise.

Additionally in October last year Kuwait Petroleum International cancelled a planned US\$ 1.4 billion investment in its Rotterdam refinery, which has the potential to be turned into storage capacity.

The LNG market – well below expectations

Taking a closer look at LNG storage, Stefaan Adriaens commercial manager at Gate Terminal, Rotterdam said there have been

many predictions for LNG to be the biggest commodity after crude in the near future. However, when it comes to storage, LNG is still not so popular as crude, not least for cost reasons. A typical 180,000 cbm LNG tank costs around €100 million to build. It can also take between 3-5 years to complete and after one year 33-50% of the LNG will have evaporated, so long term storage simply does not make sense.

LNG still has a very limited market in Europe. Just 1,500 trucks in Europe run on the fuel and at the end of 2014 only 57 ships were running on LNG – well below expectations.

THE GROWTH OF THE WORLDWIDE LNG TRADE IS THE SUBJECT OF THIS MONTH'S INSIDE OUT ON PAGE 19

Next steps with PDP

STAFF ON THE DOWNSTREAM OIL DISTRIBUTION FORUM'S (DODF) STAND AT LAST MONTH'S FPS EXPO CONFIRMED THAT OVER 6,100 DRIVERS NOW HOLD A PETROLEUM DRIVER PASSPORT (PDP)

“We're delighted with the response from industry particularly as this initiative was set up on a voluntary basis,” said Peter Oakford, DODF chair whose appointment was announced in the October 2014 issue of Fuel Oil News.

“The PDP has been accepted by every terminal in the UK and, since its implementation on 1st January there've been very few, if any, problems bar a single question on terminal access,” added Peter.

PDP in Northern Ireland and the Republic of Ireland

“We are now finalising the PDP implementation in Northern Ireland with an expected completion date of 1st August. Our next step is to open formal discussions with the government of the Republic of Ireland with a view to extending the scheme.”

Adding another layer to driver training, PDP has met with some criticism from fuel oil distributors Fuel Oil News asked Peter for his comment:

“The government wanted to see PDP as a separate qualification to Driver CPC,” explained Peter. “Both government and unions are pleased with PDP's safety benefits and have given complementary feedback on the extra levels of safety it provides.”

“The Petroleum Driver Passport is a major achievement in setting health and safety and training standards in the downstream oil distribution industry,” said Diana Holland assistant general secretary transport at Unite.

“Unite is proud to have played a central role in alerting the industry and government to the 'race to the bottom' in this vital sector; and in bringing together key players to agree the passport, safeguarding standards for our economy and for our communities.”

Please see Talking Point on page 11 for a selection of readers' views on driver training.

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PORTLAND MARKET REPORT

IT'S STILL TRUE TO SAY THAT
GAS IS NOT READY TO DISPLACE
OIL JUST YET

May update

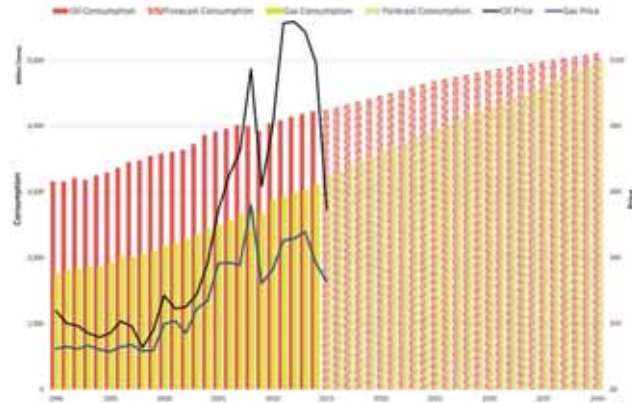
Big oil companies and their shareholders tend to panic when oil prices plummet and the result is often a splurge of corporate mergers. Indeed, it was the low oil price at the end of the 1990s, that led Lord Browne (then head of BP) to first merge with Mobil and then buy the American oil giants Amoco and ARCO in quick succession. At about the same time, Exxon bought out the remnants of Mobil, Chevron merged with Texaco and Total gobbled up Elf and Fina.

So it was no surprise that on the back of such a momentous drop in the oil price that we saw at the turn of the year, a big merger would soon be in the making. And we didn't have to wait long, as April saw the mighty Shell swoop for BG (what was British Gas) – Britain's 3rd biggest energy company – in a \$70bn takeover. Shell execs must be pleased with themselves for the new combined entity will indeed be a Leviathan – particularly when it comes to gas. In fact, the new company will be the 3rd largest gas producing company in the world, after Gazprom (Russia) and the Iranian State Gas Company.

And it is the importance of gas in this merger that is so interesting for in itself it signifies a massive sea-change in the energy landscape. Whereas the mergers of the 90s were all about the economies of scale of oil exploration, here we have blue-blooded oil aristocracy in the form of Shell spending all its money on a gas takeover. Why? Well...to put it bluntly, it is gas and not oil that represents the future of the fossil fuel industry.

In operational terms this is actually rather good news for the oil majors. In recent times they have increasingly found themselves on the fringes of oil exploration, toiling away on cost-heavy and inhospitable fields (deepwater reserves, polar regions etc), whilst the National Oil Companies (Saudi, Iran, Iraq, Venezuela) enjoy lower exploration costs in more accessible places. Gas on the other hand is a much more open playing field, where the majors seem to have the upper hand when it comes to newly discovered fields. Not to mention (AGAIN!), the shale miracle, which of course represents just

Oil & Gas: Consumption in Million Tonnes per year and Price in US\$ / Barrel Oil Equivalent



about the most openly-accessed energy market in the world and where there is not a National Oil & Gas Company in sight.

But the main reason why the oil majors (who should probably nowadays be called "oil and gas majors") are rushing headlong into the gas world is its relentless growth as an energy source. True, the graph shows that crude oil demand continues to grow going forward until 2040, but the rate of growth for gas is far, far more impressive, meaning that consumption of oil and gas by 2040 is more or less equal. There are 3 main reasons for this. Firstly, it has been and looks likely to continue being cheaper than oil. Secondly, burning gas generates unrivalled energy efficiency and finally, linked to this second point, the leaner hydro-carbon chains (lower carbon content) means that gas is by far the greenest fossil fuel on the planet.

That's why it's already projected to overtake coal as the world's largest power generation source by 2020 – a remarkable fact when you consider that at present, the world's largest energy user (China) relies on coal for 70% of its power generation and gas for only 5%. But demand for gas in the East is booming and overall, demand in Asia is set to quadruple over the next 30 years. This is a massive modal switch in global energy demand, reminiscent in many ways of the last time coal was overtaken as the prime source of energy (by oil) at the turn of the 19th century. So when Shell was considering who to buy next, it hardly seems much of a coincidence that they pursued a company with huge gas operations, rather than

another oil major with a portfolio of elaborate and complicated oil plays.

It's still true to say that gas is not ready to displace oil just yet and without doubt, it is likely to lag behind oil for many years to come. Particularly in the transportation sector where the infrastructure required for mass gas supply is enormous. Here crude and refined oil have huge advantages, for although flammable, transportation of these grades is pretty straight-forward. Gas on the other hand requires liquefaction plants, compression pipelines, specialised (pressurised) rail cars, not to mention roadside refrigeration and regasification facilities, if it is to become the prevalent fuel grade at petrol forecourts. But for a blue-chip oil & gas major, a few years is but a short period of time to wait, when all the projections seem to suggest that one day, gas will triumph over oil as the world's main energy source. In this light, Shell's latest acquisition represents both a prudent and canny long-term bet. Shame Portland is an oil man mind...



For more pricing
information, see
page 22

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

Boilers – 10 years of condensing technology

“There is no question that the decision to make condensing boilers mandatory was a wise one,” said Martyn Bridges, director of marketing and technical support at Worcester, Bosch Group which manufactures both oil and gas-fired boilers.

“Around 1.5 million condensing boilers are now sold in the UK every year and, with condensing boilers on average 20-30% more efficient and 15-30% lower in emissions than ageing standard efficiency boilers, these savings have, and continue to, stack up.

“By 2012 44% of households had a condensing boiler installed but there is still a job to be done as some 8 million non-condensing boilers still reside in homes across the UK.

“If everyone in the UK had a condensing boiler, our annual carbon dioxide emissions would be reduced by 17.5 million tonnes which, in monetary terms, could result in a saving of £1.3 billion on energy bills every year, according to the Centre for Alternative Technology.”

The boiler market faces another hurdle when the Energy related Product Directive

(ErPD) comes into effect on 26th September. ErPD will establish future performance standards for domestic and commercial heating products throughout Europe. The Directive, which aims to phase out lower performing energy using products, covers a wide range of products for domestic and commercial use including electrical powered products, boilers and water heaters.



April 2007 saw Worcester introduce A-rated boilers under the SEDBUK efficiency scheme (I) and now 10 years on from the mandatory introduction of condensing boilers, the boiler manufacturer is working towards an A+ efficiency rating under the ErP Directive

Realistic energy policies to tackle fuel poverty and carbon emissions

MORE THAN ONE MILLION HOMES IN RURAL ENGLAND, SCOTLAND AND WALES, AND ALMOST 500,000 IN NORTHERN IRELAND, ARE HEATED BY OIL. A FURTHER 250,000 BUSINESSES ARE ALSO HEATED BY OIL

Approximately 80% of these oil-heated homes are in the lowest energy efficiency bands F and G and, as a result, some 40% are in ‘fuel poverty’ according to the new definition, with many also occupied by older and vulnerable people.

Last month, supported by rural charity ACRE (Action with Communities in Rural England), OFTEC and the Federation of Petroleum Suppliers wrote to prospective parliamentary candidates in rural constituencies with the intention of ensuring that the next government will implement policies that will help the forgotten rural fuel poor whilst also cutting carbon emissions.

Calling for a ‘serious re-think’

Pointing out the very limited take up of the Green Deal and the domestic Renewable Heat Incentive (RHI), two failed flagship policies from which the fuel poor are excluded due to high upfront costs, the letter calls for the following policy changes:

- ✓ Improved insulation levels in UK homes
- ✓ The installation of high efficiency condensing boilers through a generous boiler scrappage scheme applicable to oil boilers as well as mains gas boilers
- ✓ A revision of the domestic RHI to include more pragmatic steps to encourage the installation of low carbon heat – e.g. improved incentives for hybrid heating solutions and recognising bio-liquids such as B30K
- ✓ An extension to the £25 million scheme to install heating systems in fuel poor homes without one, and to upgrade existing heating systems in fuel poor households
- ✓ A more holistic domestic energy policy that will address fuel poverty and carbon emission reduction simultaneously, rather than as separate goals

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PICTURES FROM AN EXHIBITION



George Simpson (l) from West Midlands-based A&R Vehicle Services with Steve Gillingham of DFT's Dangerous Goods Division



Tanker of the Year presentation to Howells Fuel Oils and RTN Lakeland (l-r) Jane Hughes, Brian Edwards, Les Howells, Linda Farrow, Roger Howells, Clive Felton and Suzanne Newall



A tanker with sporting connections on the Cisternas Cobo stand



Bruce Woodall, managing director of Oil Tank Supplies demonstrating fuel quality. The OTS Tankcare division provides technical advice and preventative maintenance for fuel oil storage facilities



Andy McAvoy, Inver Energy, Paul Preston, Turners (Soham), Bruce Williams, Williams Tanker Services and Tony Wilson, Inver Energy beside Inver Energy's latest tanker



Alan Davies (l), chief executive of DJ Davies Fuels in Ammanford, Wales with commercial director Jonathan Davies



Visiting the Fuel Oil News stand are Marcus Jones (l) from TR Jones on Anglesey and Mark Adcock of NWF Fuels



(l-r) Trevor Seed, J Seed, Greg Clarke, IFC Inflow with Marcus Dandy and Nick Heath of Preston-based Compass Fuel Oils

PICTURES FROM AN EXHIBITION



The nearest to the pin competition on the Lion Safety stand attracted many entries



From Stoke on Trent distributor Potteries Fuels – managing director Tony Griffiths with business development manager Jeff Worsdale



This British Touring Car sponsored by Fuel Science Additive Technologies (FAST) was a bright addition to the many tankers outside the exhibition hall



Armed with ideal reading material – Gavin Brannigan and Martin Hughes from Oil Direct, Drumore, County Down



An extra special new tanker for Standard Fuel Oils – Nick Goodwin shakes hands with Brian Edwards, RTN Lakeland with Seb Hoxter (far right)



David Hodge of Ribble Fuel Oils alongside one of two new Magyar-built tankers ordered by the Preston-based distributor



Ray Geary – runner up in the FPS Driver of the Year competition – a Barton Petroleum tanker driver who had a close encounter with a plane whilst out delivering



A Tasca Tankers build for Scottish distributor Oilfast



With the introduction of the Driver CPC in September 2013 and the Petroleum Driver Passport (PDP) this January, Fuel Oil News sought readers' opinions on these recent additions to driver training

For any person receiving training a relevant question should be: *"What is the value of this training to help me with my job?"*

Whilst Driver CPC and PDP both seek to provide vocational training to enable drivers to carry out their jobs more safely and with less risk to the environment, in their current forms both seem to be less than perfect.

PDP seems to be aimed at drivers loading from mainline terminals and carrying out deliveries to retail sites. As a large number of drivers in the fuel distribution sector rarely deliver to retail sites, the training's value is substantially diluted.

With respect to Driver CPC, a driver can attend a 7-hour training course such as roping and sheeting of flatbed vehicles, offering little, if any, practical benefit to the driver of a rigid road tanker delivering mainly kerosene, gas oil and diesel, bar its contribution to the requisite 35 hours to complete the Driver CPC! Potentially, a driver can go on the same 7-hour course over 5 consecutive days – this situation clearly isn't right.

David Mattock, Beacon Safety Consulting

WP Group is committed to providing its drivers with the best training possible to enhance their professionalism. The PDP scheme provides essential training specific to the oil industry and raises the standard of our drivers to the very best in the country.

Russell Fairchild, WP Group

PDP is fantastic; it provides industry specific training that benefits the driver and raises the industry's standards. We've now trained some 1600 drivers to date and received very positive feedback. Some distributors have even chosen to put all drivers through PDP, even those that do not use terminals.

We offer industry specific training where drivers come out having learnt something pertinent to their job. Our Driver DCPC offers continued development based training and there's been no negativity from drivers.

Ken Taylor, OAMPS Training

Driving a tanker can be a challenging job and a high level of training is required, sadly PDP was a missed opportunity. There's nothing in PDP that really adds any value to trained drivers. It's a shame that more people closely involved in driver training weren't asked for their opinion. I honestly don't believe PDP offers any additional benefit and neither do our drivers, in its current format it is simply an unnecessary additional cost.

The Driver CPC is another waste of time – I've heard of CPC courses where the drivers turn up and spend the day playing games on their phones, they know they don't have to learn anything whilst there nor do they have to pass an exam at the end of it. Talking to trainers who run the courses it's not surprising that they hate it as well.

Whilst PDP is a bit better than CPC – but not a lot – they're both something of a box ticking exercise and as such a waste of time and money. On the other hand, ADR is meaningful and offers a good level of refresher training and the standard is tested with an exam at the end of the course, as a result the ADR qualification actually means something.

I think that both basic and refresher training are a good thing and that they should be used to reduce the risk of accidents and incidents in our industry but it would be so much better if that training was meaningful and represented a standard that our drivers benefited from and were proud to achieve. My hope is that common sense will prevail and the PDP and CPC qualifications could be combined and turned into something worthwhile.

Rory Clarke, Rix Petroleum

We decided to enrol all our drivers for PDP training for two reasons. Firstly it provides us with an independent assessment of our drivers, and our driving procedures, supporting the level of professionalism we aspire to, and secondly the training itself can be counted towards the CPC annual 7 hour quota for each driver.

Richard Burton, Barton Petroleum



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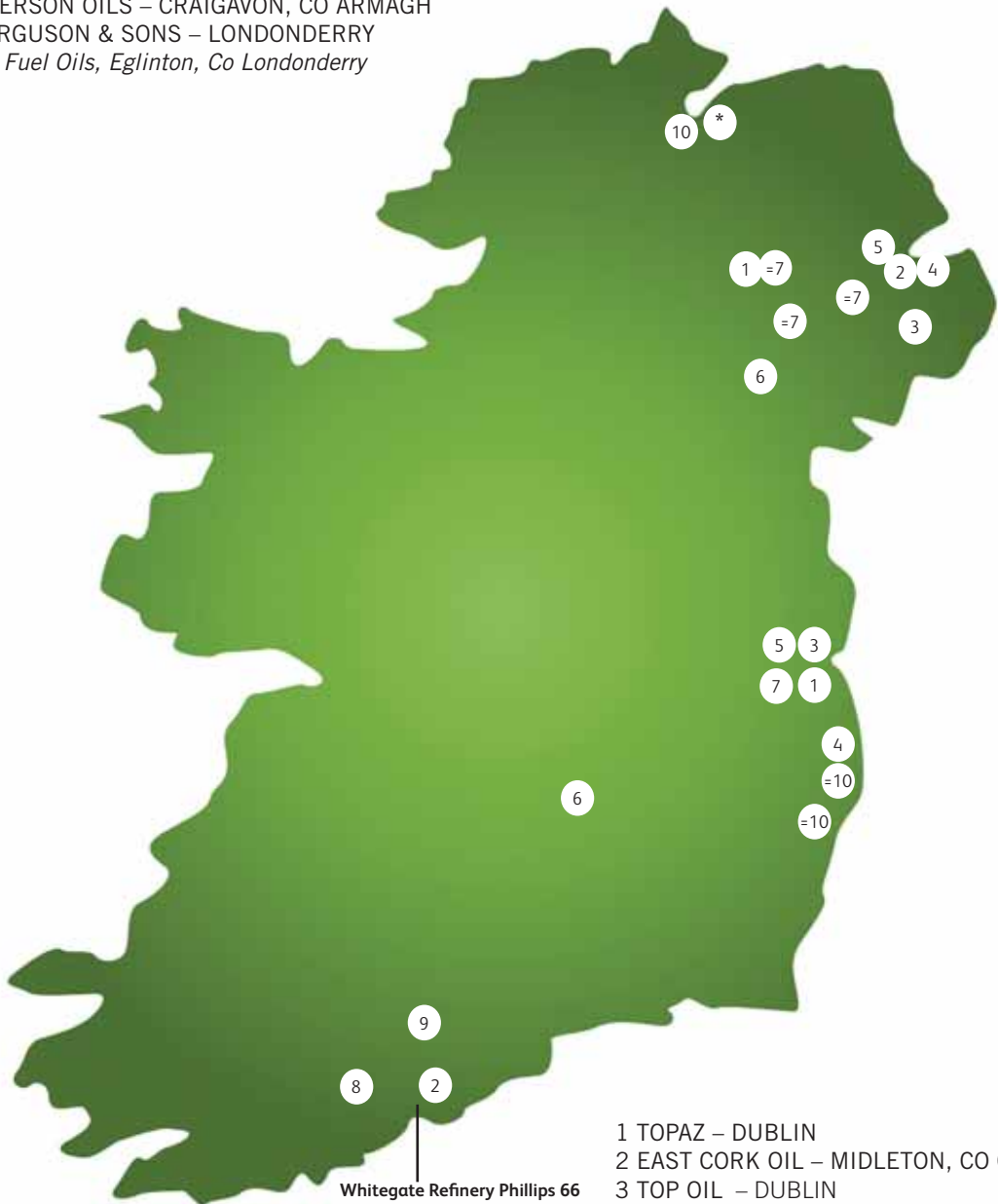
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TOP 10 IN NORTHERN IRELAND

- 1 LCC OIL – COOKSTOWN, CO TYRONE
- 2 EMO OIL – BELFAST
- 3 D&W CARLISLE – BALLYNAHINCH, CO DOWN
- 4 TOPAZ ENERGY NI – BELFAST
- 5 TOP KELLY FUELS – BELFAST
- 6 THOMPSON FUELS – TANDRAGEE, CO ARMAGH
- =7 COLIN J MORROW & SONS – LISBURN, CO ANTRIM
- =7 AH FUEL OILS – COOKSTOWN, CO TYRONE
- =7 PATTERSON OILS – CRAIGAVON, CO ARMAGH
- 10 P FERGUSON & SONS – LONDONDERRY
- *Nicholl Fuel Oils, Eglinton, Co Londonderry



Plotting the top fuel oil distributors on the map of Ireland alongside proved to be an interesting exercise with the vast majority of businesses based in the east and south east with several close to the coast.

The information, which is derived from tanker fleet sizes provided by distributors, was first published in the March 2015 issue of Fuel Oil News. *Based on 2010 figures Nicholl Fuel Oils would remain in the Northern Ireland top 10.

How do you see the future shape of the Irish fuel oil distribution market? Call 01565 653283 or email aine@fueloilnews.co.uk.

TOP 10 IN THE REPUBLIC OF IRELAND

- 1 TOPAZ – DUBLIN
- 2 EAST CORK OIL – MIDLETON, CO CORK
- 3 TOP OIL – DUBLIN
- 4 CAMPUS OIL – BRAY, CO WICKLOW
- 5 JONES OIL – DUBLIN
- 6 EMO ROI – PORTLAOISE, COLAOIS
- 7 VALERO MARKETING IRELAND – QUARRYVALE, CO DUBLIN
- 8 M&J KELLEHER, MACROOM, CO CORK
- 9 AMBER OIL, FERMOY, CO CORK
- = 10 GLEN FUEL SERVICES, BRAY, CO WICKLOW
- = 10 ULTIMA OIL, KILPEDDAR, CO WICKLOW

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Fuel quality – are you on top?

ON THE FOLLOWING PAGES, A SELECTION OF COMPANIES WORKING CLOSELY WITH FUEL TAKE A LOOK AT SOME OF THE ISSUES AROUND FUEL QUALITY

How do you define fuel quality?

FUEL AND QUALITY. TWO WORDS USED TOGETHER DAILY IN OUR INDUSTRY IN A MULTITUDE OF WAYS, PROBABLY WITHOUT MUCH THOUGHT AND PERHAPS EVEN LESS UNDERSTANDING WRITES NEIL RYDING, MANAGING DIRECTOR AT FAST

So what does fuel quality mean to you?

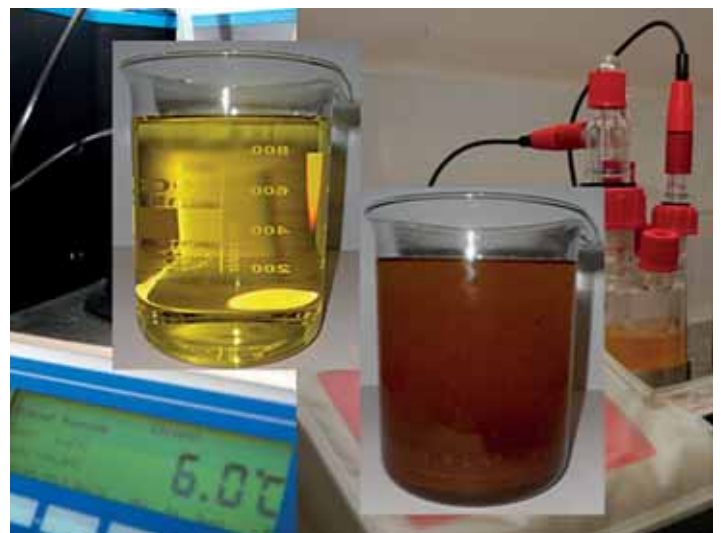
- **Conformance to national and/or international standards?**
 - The basic legal specifications to which a fuel should conform as it leaves a UK refinery or is imported into the UK
- **A measure of combustion performance?**
 - Important to end-users and the most readily noticeable gauge of fuel variance
- **A measure of pre-combustion cleanliness?**
 - A relatively new concept favoured by fuel polishers and tank cleaners but frowned upon by the purists. Utilises ISO4406 particle analysis – really a lube oil standard but mentioned briefly in the World Fuel Charter
- **An indication of excellence or superiority?**
 - As used by forecourt retailers
- **A measure of an ‘emissions standard’?**
 - In the news as being favoured by politicians as another means of revenue generation – ‘demonising diesel’ – yet conveniently ignoring the fact that modern engines with proper exhaust aftertreatment systems, by some measures, produce cleaner air than they suck in
- **Fitness for purpose?**
 - Increasingly important as engine manufacturers supplying equipment to the construction, agricultural and now marine sectors are demanding changes to certain important parameters e.g. sulphur, lubricity and cetane number. The days of making engines to suit the fuels available are long gone: the fuel now needs to suit the engine

“DO YOU BUY FUEL AGAINST ITS QUOTED STANDARD OR DO YOU USE A GENERIC NAME AND HOPE FOR THE BEST?”

There is still an incredible amount of trust within the fuel supply chain as regards the *quality* of what is actually being delivered, how ever you chose to define it. Is this trust still justified with the end of the vertically integrated oil company and the rise of fuel imports? Do you buy fuel against its quoted standard or do you use a generic name and hope for the best? Do you ever ask for a certificate of analysis or conformance from the producer, terminal or wholesale supplier?

No matter where you sit it is incumbent on us all to know the products, to understand the wants and needs of the end users and to educate them as appropriate, not least in the aspects of winter and summer grade fuels, the issues surrounding long-term strategic fuel storage and the needs of modern engines and open flame systems.

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Checking fuel quality – do you ever ask for a certificate of analysis or conformance from the producer, terminal or wholesale supplier?

Keeping fuel in top condition

FROM 1ST JANUARY 2011, EU DIRECTIVE 2009/30/EC INTRODUCED A REQUIREMENT THAT ALL DIESEL AND GAS OIL MUST BE VIRTUALLY SULPHUR FREE, CONTAINING NO MORE THAN 10 MILLIGRAMS PER KILOGRAM OF FUEL

With the *bio* component making these fuels prone to contamination and degradation, proper storage, tank maintenance and, in some cases, fuel polishing, is key to ensuring fuel quality says Jonathan Coombes from E&S Environmental, an Adler and Allan Group company.

Currently, blends of up to 7% biodiesel and 5% bioethanol can be sold without additional labelling. It is also possible to use higher blends of biofuel such as B100 (100% biodiesel) and E85 (85% ethanol), but this may require modifications to engines. A number of vehicle manufacturers are already producing *E85 flex-fuel vehicles* which can

run on petrol containing anything from zero to 85% ethanol. In Brazil's well-established ethanol market, virtually all cars run on 30% or higher blends.

The oxidation stability can be poorer than non-bio fuels, with solids potentially formed over time leading to build-up which can block filters in fuel distribution systems. Ideally, fuel should not sit for too long, with a turnover period of once every six months, no longer than a year.

Sulphur free gas oil has a number of direct and indirect impacts on fuel users. With correct handling, however, any problems can easily be limited.

“LEGALLY, THE OVERALL RESPONSIBILITY FOR ALL FUEL STORAGE FACILITIES FALLS TO THE OWNER”

Maintenance is key to fuel quality

Fuel storage tanks should be inspected annually in accordance with OFTEC and PPG2 Pollution Prevention guidelines. Legally, the overall responsibility for all fuel storage facilities falls to the owner, including ensuring that annual inspections and subsequent maintenance requirements are adhered to.

Depending on size and type, tanks can either be cleaned manually by trained operatives or by using automated machinery; remote controlled washers that speed up the cleaning process, reducing downtime and man-entry costs. A regular fuel tank maintenance programme will extend a tank's life reducing the need for expensive replacements.

Monthly checks

Bacterial growth can be prevented by eliminating water from tanks with monthly checks advisable. Where bacterial growth outbreak has occurred, this can be addressed either by emptying and cleaning the tanks, or by seeking specialist help to tackle the outbreak through bacterial additives and fuel polishing. This process will remove infected material and eliminate the source of the problem. Fuel can then be tested and treated on-site, using mobile units, or in a laboratory environment.



The laboratory at E&S Environmental is one of only a handful of laboratories in the UK which can test fuel samples to ASTM and EN ISO standards



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Before fuel is returned to its tank, tanks must be cleaned thoroughly, to remove any residual sediment, pipes should also be flushed with clean fuel. Biocide can then be added to the tank to help delay future microbial contamination. Any filters should be cleaned or replaced and pumps bled.

Solvency and seals

Biodiesel is particularly solvent and may pick up deposits already in fuel storage, dispensing

systems and tanks. Fuel seals in sight gauges on older tanks may be incompatible with sulphur free gas oil and therefore require replacing. If a tank is being serviced it would be good practice to get seals replaced as a precaution.

A regular maintenance programme utilising fuel sampling and fuel polishing techniques, can reduce risks and extend the useful life of stored fuel.

Fuel polishing experts

Covering all petroleum refined fuels, diesel, gas oil and kerosene, E&S Environmental uses the latest fuel testing techniques, meeting British standards with UKAS accreditation pending. Testing in the laboratory or onsite is carried out by qualified technicians using the very best equipment on the market.

www.adlerandallan.co.uk

Bunker fuel quality: A guide to sulphur content and other properties

FOLLOWING THE INTRODUCTION OF NEW EU REGULATIONS CONCERNING SULPHUR CONTENT IN MARINE FUEL, SHIP OPERATORS ARE BECOMING INCREASINGLY AWARE OF THE QUALITY OF THE PRODUCT THEY ARE BUYING. ALISON STODOLNIC OF THE GEOS GROUP EXPLAINS

On 1 January 2015, the level of sulphur permitted in marine fuel in EU Sulphur Emission Control Areas, (SECA – the North Sea, Baltic Sea, North American coastal areas and the United States Caribbean Sea) dropped from 1% to 0.1%. In order to comply, many ship operators have had to switch to a low sulphur fuel such as 1000ppm marine gas oil.

However, sulphur content is not the only thing that fuel buyers need to be concerned about. MARPOL (the International Convention for the Prevention of Pollution from Ships) regulations specify a number of other fuel quality properties that must be tested at several points in the supply chain.

“SULPHUR CONTENT IS NOT THE ONLY THING THAT FUEL BUYERS NEED TO BE CONCERNED ABOUT”

One such property is **density**. The density of marine gas oil (at 15°C) is generally within the range of 820-875 kg/m³, and is usually between 850-870 kg/m³. As density decreases with an increase in temperature, any density measurement is meaningless without a corresponding temperature reading.

Viscosity (the measurement of a fluid's 'thickness') also decreases as its temperature goes up. The typical kinematic viscosity of marine gas oil is between 1.5 and 5.5 stokes.

Flashpoint is the lowest temperature at which a fuel can vaporise to form an ignitable



“As regulations change, it is becoming increasingly important for ship operators to be mindful of the quality of the fuel they are buying”

mixture in air. The minimum flashpoint for marine gas oil is 60°C.

FAME (Fatty Acid Methyl Ester) or biodiesel content is also tested, and can be within the range of 0-0.1%, although marine gas oil should be FAME free if possible.

The **Cetane Index** indicates a fuel's ignition quality – the higher the cetane index, the more easily the fuel will combust in an engine. The cetane index of marine gas oil BS2869:2010 is 45.

If a ship is bunkered with blended or commingled product that is below-

specification, it can run into operational problems – the fuel may be unstable, have poor ignition or combustibility efficiency, damage the ship's engine or make it difficult to handle. Furthermore, if fuel on board is found not to comply with maritime regulations, the cost of pumping it out, cleaning the tanks and filters and disposing of the waste can be enormous.

It is likely that all ships worldwide will be subject to a new lower limit of 0.5% sulphur content in all areas by 2020 – a global cap set by the International Maritime Organisation.

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Inside Out

THE GROWTH OF THE WORLDWIDE LNG TRADE

THE GLOBAL TRADE IN LNG HAS WITNESSED CONSIDERABLE EXPANSION OVER THE PAST DECADE. IN THE YEARS AHEAD, IT IS PROJECTED THAT DEMAND FOR NATURAL GAS WILL SHOW THE FASTEST GROWTH AMONG FOSSIL FUELS. THIS DEMAND WILL CONTINUE TO SUPPORT INCREASES IN THE VOLUMES OF LNG BEING TRADED WITH THREE NEW SUPPLY SOURCES – THE USA, CANADA AND AFRICA – ENTERING THIS ARENA AS NEW PLAYERS

Natural gas is converted from gaseous to liquid form by refrigeration to a temperature of -162 degrees C (-260 degrees F), which has the effect of reducing the volume of gas by a factor of 600, thereby facilitating its storage and transportation.

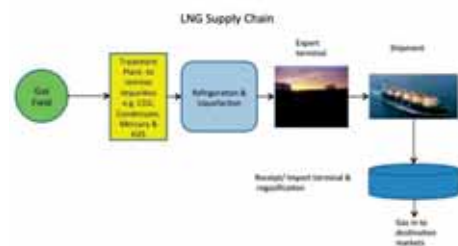
The liquefaction process also involves removal of certain impurities such as water, dust particles, condensate and heavy hydrocarbons. Because LNG achieves a larger volume reduction than in compressed form (CNG) it has a volumetric energy density 2.4 times greater and is about 60% of that of diesel.

So, on the basis that substantial quantities of the world's reserves of natural gas, as with crude oil, are far removed, or 'stranded', from the major markets where it is consumed, the transportation solution is provided by conversion into liquefied form.

Exploiting LNG dates back to a short-lived operation in Cleveland, Ohio in the 1940s. Serious start up of LNG production can be traced in both the USA and Algeria in the 1960s. The UK entered into a supply contract with the latter to ship quantities into storage on Canvey Island which continued into the early 1970s until North Sea gas came on stream.

The LNG supply chain

In simplified form, the LNG supply chain looks as follows:



A central feature of the infrastructure for the production and transportation of LNG is a facility comprising one or more 'trains', which are individual units for gas liquefaction. The largest such production complex in the world, in Qatar, comprises four facilities- Qatargas 1,2,3 and 4, with a total of 7 'trains',

the largest of which have an annual production capacity of 7.8 million tonnes per year.

LNG supply contracts are typically long term (20-25 years) given the scale of capital outlays to be recouped from establishing production facilities; traditionally, prices have been indexed to crude oil, though, recently, with increased market liquidity, there has been some 'kick-back' by buyers, seeking more appropriate local market benchmarks.

The latest vessels being commissioned have a typical carrying capacity in the range 120,000-140,000m³.

The evolution and growth of LNG trade

The past 25 years has seen a material expansion in the volumes of LNG being traded, with particularly rapid growth over the past 10 years, as indicated in the table below:

	1990	2000	2005	2014
Million tonnes	50	110	140	310

This growth pattern is projected to continue at an average rate of circa 8% per year to 2020 (BP Energy Outlook, 2035), with annual volumes approaching 400 million tonnes by 2018.

Last year the top five players (exporters/ importers) were:

EXPORTERS	Quantity (Million MT)	IMPORTERS	Quantity (Million MT)
QATAR	77.7	JAPAN	88.8
MALAYSIA	24.6	SOUTH KOREA	37.6
AUSTRALIA	23.4	KOREA	20.4
NIGERIA	18.9	CHINA	13.4
INDONESIA	18.3	TAIWAN	13.1
		INDIA	13.1

As a result of two very large gas fields expected to come on stream off its west coast next year, coupled with the coal seam projects being developed in Queensland, Australia is expected to overtake Qatar, with export capacity rising to 86 million tonnes by 2020.

For the UK, imports of LNG – around 90% of which are sourced from Qatar – play an increasing role as a source of gas supply, meeting around 25% of the country's requirements. These are fed principally into three large storage and re-gasification facilities, all built in the last 10 years, two at Milford Haven

and one at the Isle of Grain; a further floating re-gasification facility has also been established at Teesside. By 2020, it is projected that LNG imports will supply almost 50% of the country's gas requirements.

Future prospects

Back in the early years of the current millennium the biggest potential market for LNG imports was seen to be the USA and a number of storage facilities were commissioned. The discovery and development of shale gas reserves in Texas, Pennsylvania and North Dakota has been a significant game changer – not only in eliminating a large outlet for the traditional LNG producers but, more importantly, in creating a very substantial potential new source of supply. It remains to be seen what stance the US government adopts in sanctioning gas exports – in the face of continuing and vociferous opposition from domestic industrial and commercial interests (gas users!). That notwithstanding, there is clearly a 'measure of expectation', judging by the number of projects identified to the Federal Energy Regulatory Commission, which is the approving authority for LNG export terminals. It currently lists:-

- 5 export terminals for which approval has been granted and are under construction (4 on the Gulf Coast, 1 in Maryland)
- 15 proposed export terminals (mainly Gulf Coast) + 1 in Alaska + 3 in Canada identified by project sponsors
- 13 potential export terminals (mainly Gulf Coast) + 16 in Canada identified by project sponsors

So, the balance of probability is that there will therefore be two major new players in North America partaking in the global LNG export trade over the coming years. The recently published BP Energy Outlook forecast that the US would be the third largest export supplier by 2035 – behind Australia and Africa (mainly East Africa).

The same publication also forecast that the expansion of LNG trade will be driven by the Asia Pacific region, with net imports nearly trebling and accounting for 50% of global gas net imports by 2035 – and overtaking Europe as the largest importing region in the early 2020s.



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Engine oil reduces fuel costs

A SEVEN-MONTH TRIAL USING MOBIL DELVAC 1 LE 5W-30 ENGINE OIL HAS HELPED A FRENCH HAULIER TO MAKE AVERAGE FUEL SAVINGS OF 1.87%

The aim of the trial was to demonstrate that by using this fully synthetic engine oil, the company could decrease fuel consumption and extend drain intervals when compared with its current engine oil, SAE 15W-40.

The company monitored the fuel consumption of two of its trucks over seven months. The daily consumption measurements taken for each truck using Mobil Delvac 1™ LE 5W-30 engine oil revealed average fuel savings of 1.87% compared to the rest of the fleet, despite all vehicles operating in similar conditions.

*The savings could translate to an overall €13,100 reduction in fuel costs and 34 tonnes reduction in CO₂ emissions per fleet per year.

The most important factor in creating fuel savings is to ensure that lubricants maintain their viscosity during use. Optimum viscosity across different engine applications helps to reduce friction and therefore fuel consumption. However, viscosity can increase over time. Ash particles, various contaminants and oxidation can cause oil to thicken, reducing fuel savings and compromising engine protection. Therefore, any engine oil designed to encourage fuel savings must be specially formulated to combat oxidation and oil thickening phenomena. www.mobildelvac.co.uk

*Savings calculated according to an average annual mileage of 110,000 km per vehicle, with a pre-oil change consumption of 30 L/100km, fuel costing €1.10 per litre (excluding tax) and an emission factor of 3.07kg of CO₂ per litre of fuel.



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Fuel management as a service

KEEPING A TIGHTER CONTROL ON FUEL SUPPLIES AND FUEL MANAGEMENT IS A PRIORITY FOR THE CUSTOMERS OF MANY FUEL OIL DISTRIBUTORS

MIS Fuel Monitoring offers Merridale FuelWorks – Fuel Management as a Service (FmaaS) – which enables complex business applications to be delivered on a subscription service basis.

“Getting started is simply a matter of setting up the database and installing suitable remote communications links at the depot fuelling points,” explains sales director Stephen Hannan.

“The Merridale FuelWorks service is easy to use and most new users require minimal onsite set up or training. A telephone help desk is provided to answer and supplementary training ensures that customers are ready to get up and running without delay. More specialised training can be provided for administrators of multisite installations.”

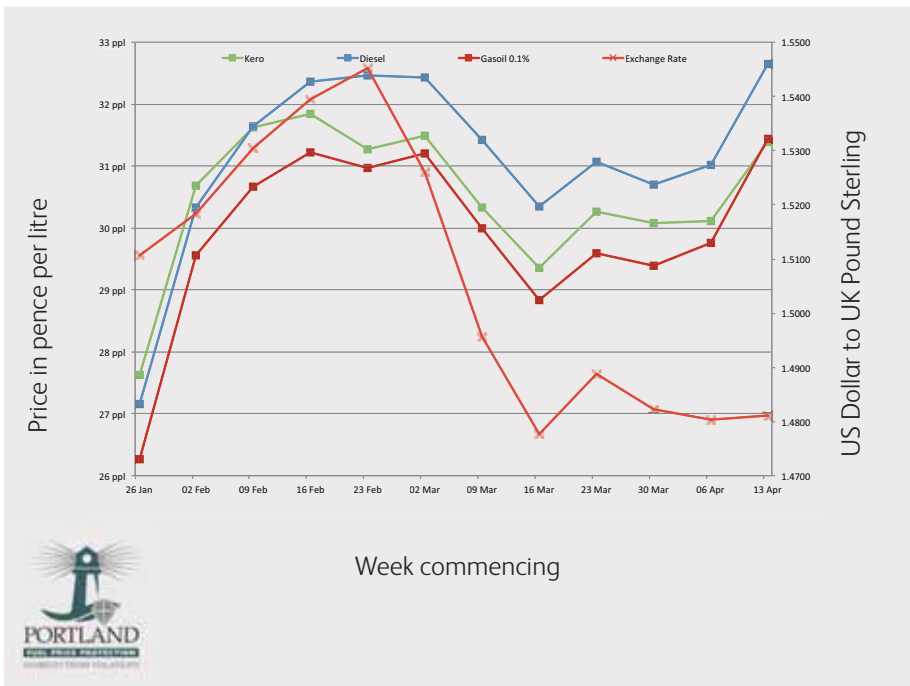
Reports and alerts can be designed to suit specific operational requirements and the information can be accessed from any standard web browser – whether this is an office computer or a mobile device. www.merridale.co.uk



Wholesale Price Movements: 19th March 2015 – 18th April 2015

	Kerosene	Diesel	Gasoil 0.1%
Average price	30.39	31.34	30.00
Average daily change	0.42	0.46	0.45
Current duty	0.00	57.95	11.14
Total	30.39	89.29	41.14

All prices in pence per litre



Highest price
32.02 ppl
Fri 17 Apr 15

Biggest up day
+1.38 ppl
Thu 26 Mar 15

Kerosene

Lowest price
29.55 ppl
Fri 20 Mar 15

Biggest down day
-0.88 ppl
Thu 02 Apr 15

Highest price
33.27 ppl
Fri 17 Apr 15

Biggest up day
+1.31 ppl
Thu 26 Mar 15

Diesel

Lowest price
30.34 ppl
Thu 02 Apr 15

Biggest down day
-0.82 ppl
Wed 08 Apr 15

Highest price
32.14 ppl
Fri 17 Apr 15

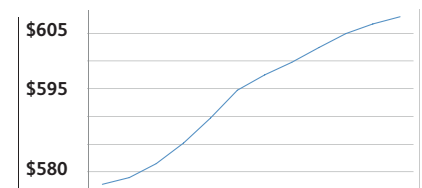
Biggest up day
+1.40 ppl
Thu 26 Mar 15

Gasoil 0.1%

Lowest price
28.99 ppl
Thu 02 Apr 15

Biggest down day
-0.83 ppl
Thu 02 Apr 15

Gasoil forward price
in US\$ per tonne



May 2015 – April 2016

The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Platts	30.57	41.32	90.25			
Scotland	32.96	45.66	92.22	39.90	48.90	96.30
North East	32.90	44.36	91.65	36.90	46.86	93.65
North West	31.63	44.13	91.12	36.37	47.53	94.00
Midlands	31.36	43.65	90.36	36.95	46.95	93.20
South East	32.15	44.02	90.55	40.52	49.18	92.91
South West	31.45	43.30	89.86	36.50	45.50	91.95
Northern Ireland	32.24	44.94	90.63	34.76	47.41	-
Republic of Ireland	52.05	57.70	197.48	61.60	65.91	91.95

The price totem figures are compiled from the results of a telephone survey of distributors carried out on 07/04/2015. 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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