

# Fuel Oil News

 Incorporating **DOWNSTREAM**

**AUGUST 2023**

## **THE HEALTH & SAFETY ISSUE**

**A LOOK AT LOGISTICS**

**DELVING INTO DATA**



# FUEL THEFTS ON THE INCREASE



Exocet<sup>®</sup> Diesel Defender is compliant with Regulation 14(3) of the Hydrocarbon Oil (marking) Regulations 2002 and therefore:

- causes no issues with identification, quantification, and classification of marked rebated fuels within mainland UK
- is notified with HMRC
- does not cause interference with statutory markers
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## Can we get to the start line?

"The hardest thing is not getting to the finish; it is getting to the start."

Those are the words of wisdom to which I attribute one of my greatest personal achievements to date.

Back in 2017 I had one of those slightly insane life moments, driven, no doubt, by my 50th year looming large, and signed up for the British Heart Foundation's London to Brighton ride.

Those of you who regularly propel yourself around our nation on two wheels will wonder what was quite so momentous about taking on a 54-mile bike ride. If I add that I'd entered with just three months to go and not yet in possession of a road bike, the scale of the challenge may be a little clearer.

A bike was duly secured, training commenced and Father's Day, 18th June 2017, saw me conquering Ditchling Beacon in a heatwave and riding into Brighton with the broadest grin on my face, raising a decent amount for the charity in memory of my Dad, who we lost way too young.

That first challenge had, initially, seemed to me insurmountable but, bitten by the bug (and being something of a masochist) I then took on the Ride

London 100, completing it in torrential rain at the end of July 2018.

Others followed and, for my 'piece de resistance' I decided to take on the insane C2C – peddling 150 miles from Seascale to Whitby up Hardknott and Wrynose passes, from one side of our glorious country to the other – in a day.

I chickened out. I wasn't ready. I deferred to 2019. And post the 2018 event was when organiser James Thurlow uttered the immortal words I opened this with, adding his observation that the vast majority of those who make it to the start get to the end. Inspired, I rocked up to the start line in 2019, still feeling way out of my depth, but determined to pedal until I could pedal no more in the vain hope that would be at the finish. And it was.

With the necessity of our transitional journey only emphasised by recent weather extremes it is vital that the Government delays no more and gets us all to the start.

It's the only hope we have of getting to the finish.



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# Fuel Oil News

The independent voice for the fuel distribution, storage and marketing industry in the UK and Ireland.

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## On the cover

A Certas tanker winding through striking Lincolnshire countryside, the rapeseed field a reminder of the biofuel feedstock challenge. On pages 34 & 35 we hear more on the imperative to decarbonise and why faster progress has to be made.

## In this issue

'Industry Analysis', pages 11 to 13, has an innovative approach to changing health and safety culture while 'In Conversation' on pages 14 & 15 considers the evolving scope of fuel logistics. On pages 17 to 24, Downstream has the latest industry data.

## Fundraising golf day is a huge hit with distributors

A recent industry golf day proved to be such a massive success with the many distributors who attended that hosts Boilerjuice are now planning to create an annual event!

Head of supply for Boilerjuice, Zoe Blackhall, commented after the event, that was held at St Ives (Hunts) golf club,; "It was a great day! The suppliers really enjoyed it, and we even had a couple of 'non-golfers' take part, which was brilliant!

"We've decided to host a supplier event each year on the back of such a successful day. Ben from Exswift won the competition overall and a few of the other golfers won various prizes.

"We were thrilled that it raised over £2,000 for children's charity Dreamdrops, and the networking was as good as we hoped. Our thanks to all those who joined us – NWF, Certas, Bartons, Rix, Exswift, New Era, Bedford, WCF, Craggs, Exocet, Eliminox and Harlequin.

"We've got some great pics as well as valuable feedback on how much the teams enjoyed the day and how we can make these events bigger and better in future!

Dreamdrops makes a real difference to sick children and their families by providing all the little (and large) extras that may be needed in healthcare situations but are not covered by public funds.

Donations can still be made on the Boilerjuice Charity Golf Justgiving page: [www.justgiving.com/fundraising/boilerjuice-charity-golf](http://www.justgiving.com/fundraising/boilerjuice-charity-golf)



## Team Exocet conquers Ultra Challenge to raise funds for MND



**A team from Fuel Additive Science Technologies (FAST) took on the Cotswold Way Ultra Challenge to raise awareness and support for the Motor Neurone Disease**

**(MND) Association.**

Rising admirably to the challenge, Team Exocet completed the 50K walk, raising vital funds for the charity which is very close to the company's heart.

### Supporting the fight

Scott Mace is an account manager for FAST, and several members of Scott's family have unfortunately been affected by MND. Scott's Mother-in-Law and her sister both passed away after a battle with the disease and now Scott's Brother-in-Law, Ryan, faces his own battle.

Ryan was diagnosed in January 2022, aged 28, and has faced his diagnosis with determination and amazing positivity. Unfortunately, the disease has taken its toll, and Ryan is now bed-bound and supported with a NIV 24/7 to help with his breathing.

Despite all that is going on for Scott and his wife Vicki they are determined to raise awareness and much needed funds for research into this cruel disease and, to this end, they embarked on the Ultra Challenge.

10 and a half hours after starting their challenge at 6am, on one of the hottest days of the year, the team crossed the finish line, raising an impressive £4432.

### Extremely proud

Paul Derham managing director of FAST said: "Scott and Vicki approached me to ask if we could raise awareness and raise funds. I was more than happy to support them and decided to join them.

"Despite everything they have to deal with, this incredible couple still find the time to walk 50K on a Sunday and the whole team at FAST Exocet are extremely proud of them both."

## Greenergy agrees terms for sale of service station network

**A total of 241 retail gas and convenience sites located across Canada are included in the agreed sale of Greenergy's Canadian retail business to Global Fuels. The network is one of the largest in Canada.**

"This acquisition is a perfect fit for us," commented Dave Armstrong, CEO of Global Fuels. "It is consistent with our strategy to develop the leading gas station network in Canada while deepening our relationship with Imperial as a strategic Branded Wholesaler of the Esso, Mobil, and Esso Cardlock business."

"We're excited to have the Greenergy retail team join the Global Fuels family. They bring a wealth of knowledge and operating experience,

which we see as complimentary to our, predominantly, dealer business," added Andrew Armstrong, Vice President of Global Fuels.

Christian Flach, CEO of Greenergy expressed his own appreciation to the retail team: "I would like to thank our retail team for their continued dedication and commitment to Greenergy over the last three years."

Highlighting the company's strategic direction, Christian Flach, Greenergy CEO explained the decision to divest: "Following three years of significant growth and development, Greenergy is divesting its Canadian retail business to focus development on its renewable project pipeline."



## Suttons Tankers rolls out HVO on road to net zero

**Aligned to its ESG strategy, Suttons Tankers has embarked on an eight-week HVO trial.**

The trial phase aims to reduce CO2 emissions by 91,000 kgs on just 5 routes. Full implementation throughout the Suttons fleet aims to reduce 39,000 tonnes of CO2, which is 85% of its Scope 1 emissions.

Aiming to become net zero by 2040, this trial is one of many initiatives within Suttons ESG strategy which focuses on laying the foundations for a sustainable future.

Steve Hassall, fleet director, commented: "Sustainability, ESG and reducing our carbon footprint are at the absolute forefront of our agenda at Suttons, and in order to move this forward we are trialling HVO so that we can fully understand the emissions reductions, costs and practicalities of this product.

It is naturally more difficult for logistics businesses to reduce their impact on the environment than other industries, but the emergence of alternative fuels, such as HVO, is a step in the right direction and one that will significantly reduce emissions."

## Essar expands fuel distribution into South East

**A deal with Essex-based Oikos Storage will allow Essar Oil (UK) Ltd to expand fuel distribution into new markets.**

Under the agreement, Essar will store and distribute middle distillate fuels at Oikos' Canvey Island facility to serve the Thames region – the largest market in the country. The agreement also enables Essar to leverage Oikos' connectivity to the United Kingdom Oil Pipeline ("UKOP") system to boost supply resilience.

Deepak Maheshwari, CEO of Essar Oil UK, said: "This agreement represents a significant step in Essar's strategic downstream ambitions, boosting capacities and ability to meet demand at Northampton and Kingsbury. We are delighted to be working with Oikos to gain access to the largest market in the country."

Carlos Rojas, chief marketing officer, said: "Supply resilience and security are paramount for our customers. This agreement is a testament of Essar's commitment to strengthen our supply proposition in the Midlands and extends our winning customer offering to customers in the Thames region."





## Essar's new flagship forecourt is officially open

Blackpool Road, Preston is the site of Essar's new flagship forecourt, Lea Gate, which was officially opened in July.

With the objective of 'driving community convenience' in mind, the new forecourt has both an 8-bay fuelling area for normal vehicles at the front and a second 4-bay area specifically for heavy vehicles (HGVs) at the back. The fuel pumps will include super grades of fuel including high octane Essar 99 as well as Adblue and there are also two electric vehicle (EV) charging bays on site.

A large, 3,000 sq. ft., Morrisons store will provide fresh sandwiches and bakery goods made on site as well as fresh hot and cold food to go. The store includes an innovative refrigeration system that recovers 97% of heat lost from fridges to take care of the site's



heating needs.

Speaking at the official opening, Carlos Rojas, chief marketing officer, said: "We are delighted to be opening our new flagship forecourt for customers at Lea Gate. Our whole approach is about driving customer convenience and we have made visiting this site an easy and value-added experience by creating numerous fuelling bays, a large convenience store and a Costa Express and by having friendly staff and much more on offer."

35,000 vehicles a day are expected to pass the site along Blackpool Road – a figure that is expected to double with the opening of the new Western Distributor Road.

## Mabanaft – a daily mindset of gratitude

Sunday 2nd July was the UK's third annual 'Thank You Day!', a celebration day that has grown hugely in popularity. Over the past two years, fifteen million people have taken the chance to say thank you – to all the people that make a difference.

Mabanaft wanted to make sure it took this opportunity to give thanks for the contribution of all staff, partners, and customers but also emphasised that the company's gratitude wasn't solely for that day.

"At Mabanaft, we go beyond dates on the calendar and embrace a daily mindset of gratitude. We consistently value and recognise globally the remarkable contributions of all our colleagues, partners, and customers. Today and every day, let's celebrate by acknowledging and appreciating the achievements, collaborative efforts, and unwavering support that make our work environment genuinely exceptional.

### Invaluable contributions



Clare Charlton, head of sales and marketing for Mabanaft said: "I want to express my gratitude to the incredible individuals who make

Mabanaft UK an extraordinary workplace. Your dedication, passion, and hard work continues to play a pivotal role in our success.

"I am thankful to every member of the Mabanaft family. Your contributions are invaluable, and it's through your exceptional efforts that we continue to thrive as a company. Thank You Day gives us a moment to pause and reflect on the impact we create together."



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## THE LATEST UPDATES FROM OUR DISTRIBUTOR COMMUNITY



### Craggs Energy – Employee of the Quarter

Craggs Energy, the West Yorkshire-based distributor, is delighted to announce their latest Employee of the Quarter winner – Adam Wolstenholme.

#### Hard work doesn't go unnoticed

Adam, an assistant management accountant at Craggs, said: "I was so pleased to have received the Employee of the Quarter award. It's great to know that hard work doesn't go unnoticed here. We are encouraged to gain and grow our skills through qualifications and the support received whilst studying is great."

Craggs is supporting Adam with his CIMA qualifications which will eventually see him qualify as a chartered management accountant.

Craggs marketing director Ben Duckworth presented Adam with the award saying: "Adam has been with the company for just under a year now but what a massive impact he has had, not only within his own team but throughout the whole of Craggs Energy.

"He has recently completed his Level 4 certification in business accounting and continues to strive for more qualifications. Thanks for all your great work we appreciate it!"

*Congratulations Adam!*

### Nolan Oils – regattas and raffles



Nolan Oils, the Oxfordshire-based distributor, is proud to be sponsoring two local charities.

The Nolan Oils team and friends enjoyed a fabulous day out at the Henley Regatta and hosted a fundraising raffle.

Luke Nolan, sales manager, said: "We are delighted to have raised £1158 for Sands, the stillbirth and neonatal charity, and £500 for the charity Angels Against Breast Cancer.

"We raised the money by hosting a raffle at the Henley Regatta, then Nolan Oils matched the proceeds raised on both days with a donation. It is very important to our family business to support local charities where we can."

*Great work Team Nolan!*



### New Era Fuels – supporting a charity bike ride

New Era Fuels, the Essex-based fuel distributor, is proudly supporting Macmillan Cancer Support and recently sponsored Damian Ransome, from Travis

Perkins, to undertake a 1000-mile motorcycle ride, which he completed in less than 24 hours!

Amber Geggus, project director at New Era said: "We were honoured to sponsor Damian and to support Macmillan who are such an important and special charity. Damian did an incredible job!"

Aiming to ride from Land's End to John O'Groats, Damian said: "It was a fantastic ride. A real adventure. The weather was lovely and my decision to not take an easy route and see some scenery paid off. I ran it close to the clock and, although I didn't ride all the way to John O'Groats on the day, it was the right decision. I did well over 1000 miles!"

If you would like to sponsor Damian, please visit his Just Giving page: [www.justgiving.com/page/damian-adventures](http://www.justgiving.com/page/damian-adventures)



### NWF Fuels – a depot manager celebrating double success

NWF Fuels, the Crewe-based distributor, is celebrating a fantastic double success for depot manager, Abbey Eames.

Having recently won the UKIFDA Depot of the Year award, Abbey has now been nominated as Apprentice of the Year by the Staffordshire University Business Awards.

Managing the depot, Abbey has responsibility for a team of 22 and manages trucks stationed at a terminal in Kingsbury and a refinery in Immingham as well as a fleet of 13 tankers covering Derbyshire, Nottinghamshire, South Yorkshire and Lincolnshire.

Abbey completed a Level 5 Operations and Departmental Manager Apprenticeship with Staffordshire University last year and is currently topping up to Level 6 which she is due to complete in summer 2024.

Abbey said: "The apprenticeship has helped me to grow as a person as well as in a work capacity. It's been nice to interact with people from other businesses who are part of the same cohort and to learn from them.

She continued: "It can be hard working full-time alongside studying but I'm very self-motivated and it means a lot to me so I've made sure I've done everything well."

*Huge congratulations Abbey, we look forward to hearing how you get on!*



### Oilfast – star pupil of the month!

Oilfast, the independent fuel supplier with depots in Scotland, Wales, Herefordshire, and Gloucestershire, is very proud of sales administrator, Peter Rettie, who recently passed his forklift truck test.

Peter said: "I have been working for Oilfast for the last 2 months and I am looking forward to the challenges ahead. The depot is getting busier and busier with lubricant sales and having the forklift license allows me to assist with collections for our customers and to load products for delivery."

*What a brilliant member of the team, many congratulations Peter!*



### Nolan Oils – The future is in safe hands

Nolan Oils has had a busy month with Luke Nolan celebrating his recent qualification from Oxford Brookes University.

Mark Nolan said: "I'm so proud of Luke for completing the Help to Grow Business Management course.

"I know from his comments the course will stand him in good stead in the forthcoming business challenges in running Nolan Oils. Luke is now looking forward to the next Scale Up Network course in October.

"We would highly recommend the courses at Oxford Brookes University either face to face or by Zoom/Teams so you can attend the course from anywhere in the country."

Luke added: "I am over the moon to have received my certificate for Business Management at a presentation evening after completing my Oxford Brookes University Course.

"The course has really help me to learn new skills and enabled me to grow as a business leader. I think it is important to always keep learning and improving with an open mind to new ideas."

*We couldn't agree more. Congratulations Luke!*

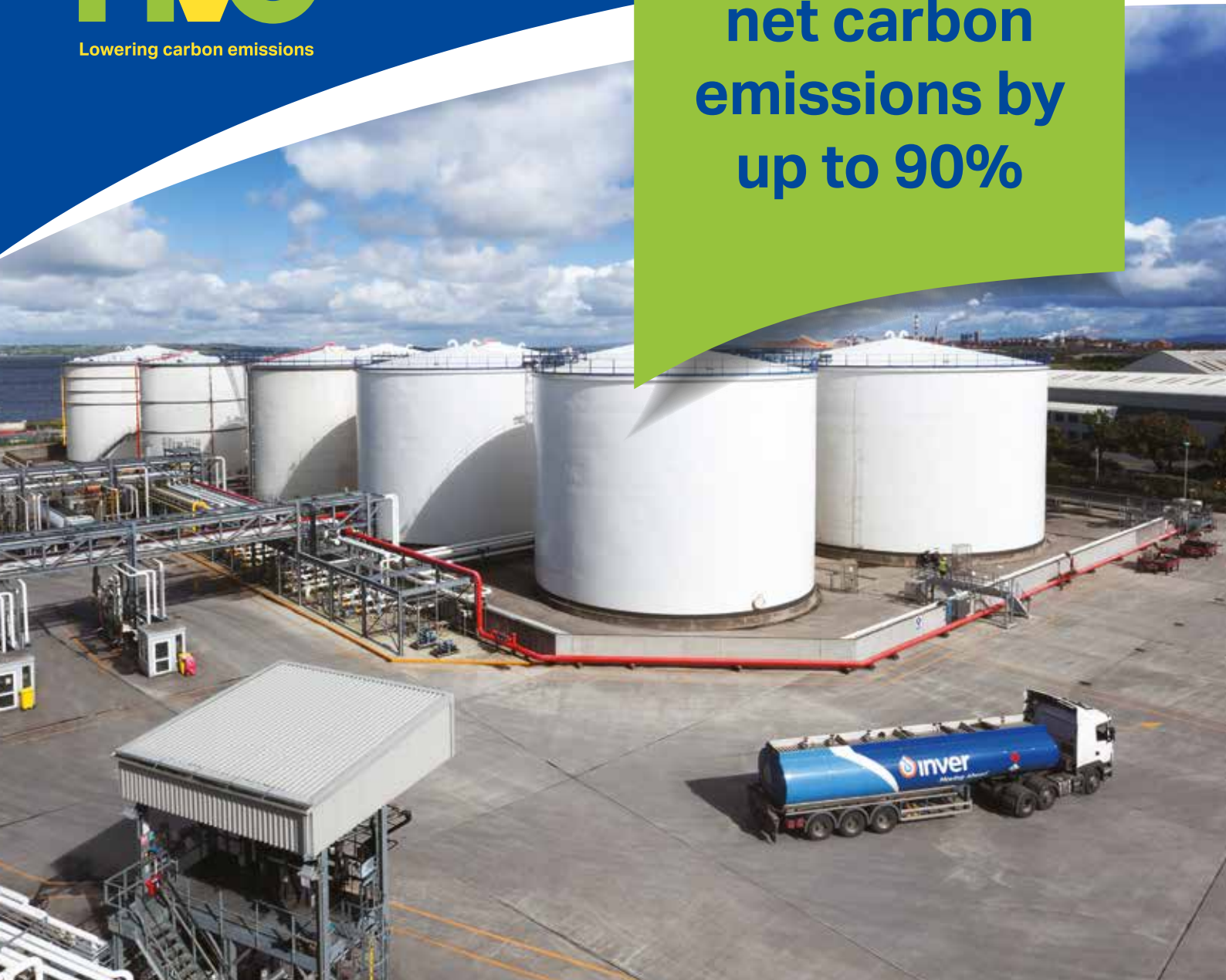
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### WCF Chandlers – attracting future talent

WCF Chandlers, the Lincolnshire-based distributor, is actively planning to recruit and attract the next generation.

On the 5th of July, Danielle Casbon, people and culture partner at WCF Chandlers, and Sophie Kay, sales and marketing executive, attended the first ever Future Fest at Boston College organised by South and East Lincolnshire Councils Partnership.

830 young people from local schools and academies attended on the day to find out more about the wide variety of career opportunities available across the region, helping them to make those important decisions ready for life after leaving school.

Danielle said: “It was great to see so many employers from across Lincolnshire come together to engage with all the young people who are looking to plan their next steps for their future careers. Who knows, maybe we met some future WCF employee-owners at the event!

“Promoting the different opportunities within the fuel distribution sector is something we at WCF Chandlers are focussing on to attract future talent to our industry. We have recently partnered with the Greater Lincolnshire Local Enterprise Partnership and have started attending several local careers fairs within the region and I have signed up to be an Enterprise Advisor.

“As an Enterprise Advisor I work closely with the senior leadership team of a specific school or college to support the development of a whole school strategy for careers, enterprise and employer engagement and help schools and colleges to focus efforts on programmes and activities that are most effective in motivating young people, supporting independent choice and supporting positive outcomes for young people.”

*If your business is also involved in speaking with the next generation of talent, then do get in touch to tell us more: [claudia@andpublishing.co.uk](mailto:claudia@andpublishing.co.uk)*



### WCF Chandlers – It's a Knockout!

Another busy distributor, WCF Chandlers, is also continuing to raise vital funds for the Lincolnshire and Nottinghamshire Air Ambulance Service.

In July, a team from WCF took part in ‘It’s a Knockout’ – a local charity event – which was a great opportunity to raise money and have fun at the same time. The event features costumes from the original BBC TV game show, crazy challenges, giant inflatables, and plenty of water!

Clare Cheevers, a key account manager at WCF, said: “The atmosphere was electric as our two teams faced fierce competition from all the other teams taking part. The camaraderie between us was amazing and helped us to a very credible 6th place!

“We had such a fantastic time whilst raising money for a great charity – getting the feel-good factor twice.”

*Congratulations to the team at WCF Chandlers on raising money for such an important cause.*

# Is there a place for biofuels in Ireland's future energy strategy?

WE CATCH UP WITH **DAVID BLEVINGS** OF THE NORTHERN IRELAND OIL FEDERATION (NIOF) AND OFTEC IRELAND MANAGER, FOR HIS THOUGHTS ON THE LATEST PROGRESS.



The big ‘advantage’ that Ireland has in the push to include biofuels in future energy strategies North and South of the border is the size of the liquid fuel sector. In NI, liquid fuel is used by c.60% of consumers and in ROI its c.40%. That’s 1.2 million homes relying on a liquid fuel. Add to that, the low levels of energy efficiency in the households, lower levels of income (NI) and the high cost of retrofits, and you can see the dilemma that faces the Governments in both jurisdictions.

The liquid fuel sector is lobbying hard, and recent developments are encouraging. Ahead of the Department for Economy (DfE), Energy Branch heat consultation we provided up-to-date information on biofuels, and they readily admitted that there is no one solution for decarbonisation of heat in Northern Ireland, indicating that all no and low carbon solutions will be required to meet the carbon reductions that have now been signed into law under the climate act.

Due to there being no Stormont Executive in NI, the DfE has advised that the heat consultation, that was scheduled for summer 2023, is likely to slip back to the autumn if not into early 2024. On one hand that is negative, but work continues, and a positive for our sector is that DfE have established a biofuels stakeholder group (including OFTEC and NIOF) and the first meeting is planned for the end of July.

## A big statement

DfE is developing a call for evidence (CFE) on the roles that HVO and renewable biofuels will play in decarbonising heat in Northern Ireland’s homes and buildings. One very positive comment in the brief for the biofuels group is: “Properties that use kerosene or LPG could make an immediate transition to low carbon heating as **biofuels are considered carbon neutral**”.

The comment that biofuels are considered carbon neutral is a very big statement and shows clearly the positive approach the Department are taking to including biofuels in the decarbonisation process.

In the Republic, we met with representatives from the Sustainable Energy Authority of Ireland (SEAI) to discuss incorporating HVO and biofuels into the Dwelling Energy Assessment Procedure (DEAP software – similar to SAP in GB). This would allow energy assessors to choose HVO in a biofuel-heated home as, currently, that option does not exist.

The meeting was constructive, and SEAI are willing to look at incorporating HVO into the software for a 100% fuelled HVO boiler as long as we can demonstrate compliance with RED II sustainability criteria for HVO used for heating. We expect further discussions with a view to HVO appearing in DEAP by the end of this year. This is good news.

## Making the case for HVO

Like GB, we already have a number of homes and commercial properties locally running on HVO with demand for more to be converted, as businesses and consumers see an ‘easy’ route to decarbonising their homes and businesses without huge capital spend on retrofit works. Let’s hope Government listens to the increasing volume of politicians, consumers and businesses asking for inclusion of HVO in energy policy as an option for decarbonisation.

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# ACTION – changing health & safety culture from the ground up

HEALTH & SAFETY IS A PERENNIAL HOT TOPIC IN OUR INDUSTRY WHERE MISTAKES CAN HAVE VERY SERIOUS CONSEQUENCES. **LUKE ARMITAGE**, WHO RECENTLY JOINED NWF FUELS AS OPERATIONS DIRECTOR, FINDS HIMSELF TASKED WITH DELIVERING A CULTURAL SHIFT IN THE COMPANY'S OWN APPROACH AND CHATS HERE WITH MARGARET MAJOR, MANAGING EDITOR OF FUEL OIL NEWS ABOUT THE EXCITING NEW STRATEGY THAT HAS BEEN BUILT BY THE COMPANY'S OWN WORKFORCE.



Having joined NWF in late May, Luke had only been in the business for around seven weeks when we spoke, so began by explaining how he arrived there.

## From the beginning.

My working life began at Royal Mail where I started as an apprentice postman many, many moons ago and stayed for 13 years.

I worked my way up through a first line manager role, initially in the warehouse, then in the transport area, eventually taking a senior transport manager role. It was all really good experience.

The opportunity came to move to Wincanton, where I joined as national operations manager and had my first experience of fuel logistics.

I was there for 3 and a half years and ended up running the Valero and P66 planning centre, before being promoted again to also run all of our fuels contracts – Avanti Gas, P66, Valero and our own internal fuels company – Energy Link.

After a few years, a further promotion within Wincanton saw me move into the public service sector, working for HMRC – another completely different experience.

## A fantastic opportunity.

At NWF Fuels the team all work together, which makes it a fantastic opportunity to help shape the business as we move forward.

As Dave (Dave Walmsley, MD) shared with you in his interview ('In Conversation' FON June issue) we are focused on acquiring and growing so it's a fantastic time to get on board.

**You seem to be someone who sees something you can do that will make a difference to a business so you do it and end up climbing the career ladder almost by default – because you can change things.**

Exactly that! I'm always very open and honest that I'm not looking to get into a certain role or follow a certain career trajectory. I'm hungry to make a difference. I like to push myself and get my teeth into something and then see what happens after that.

**I guess that's why, just seven weeks in you're already delivering a new key strategy. How has this come about?**

In my role with NWF I have a couple of key focus areas.

Firstly, we already have many depots across the country and, as we continue to expand, it is important that we are as efficient as possible but retain our depot-based principle – the local supplier in the local area.

The second focus for me is around health and safety and ensuring that it is embedded into our culture. As a fuel distributor we are already very health and safety conscious so the new strategy we are delivering is about it being at the forefront of everyone's mind and that everyone is part of delivering 'best-in-class' health and safety.

As with any workplace there are standards and processes in place that everyone is aware that we need to follow.

As a company, we want to take it up a level. We care about our people, who do a phenomenal job, and we want to make sure that they can do that in the safest possible way.

To achieve this, we've created a new safety charter and the great thing about it is that this has been driven from the ground up. It has come from the teams at the depots and the office and isn't something being imposed.

The safety charter itself was created just prior to my arrival – my role is to implement that strategy.

## How did the charter come about?

I need to highlight Sian, Adam and Dominic from our depots and John, a regional ops manager, who were all involved in our apprenticeship scheme – Aspire.

As part of the Aspire programme, they had to deliver an endpoint assessment on their own choice of subject, and they chose health and safety. They visited other depots to speak with drivers and depot staff as well as head office, to get a complete picture.

The picture that emerged was that we needed to reinvigorate our approach to these important messages and think differently.

Safety is our number one priority both for our teams and for the customers we deliver to and the Aspire team captured this perfectly in their safety charter with a fantastic new approach. It is why I've embraced the strategy and I'm excited about delivering it.

## What does the charter change and how are you planning on implementing it?

There is a really powerful strapline – ACTIONS – and the most powerful thing is that it has all come from the teams – those out in the field who know what the day-to-day challenges are.

One of the first key things is making sure that our depot teams are fully skilled up and trained to know how to deal with any safety

issues or concerns that may arise.

Another element of this is that we are putting specific key people through NEBOSH courses so that we will have someone in every region who is able to support the regional teams.

Alongside this, I am in the process of implementing safety KPIs across every depot across each region, and as a company, so that we can all track how we're performing against our priorities and against previous years.

We're also putting together new monthly 'toolbox talks', related to safety, that will be engaging and interactive and will encourage more input. They won't all be talks delivered in the same way in the same room, they could be based around a vehicle, or looking at an aspect of the depot. That way, the message is more likely to stay in the forefront of their mind.

## Clearly it is all very new but how is the rollout going?

We've just launched the health and safety charter which every depot manager will sign up to. The signed charter will be displayed in each depot so the teams know their managers are committed to it, which we hope will enable them to contribute freely to improving safety wherever they see a need.

The next step is rolling out training that considers how we can mitigate the potential for human errors.

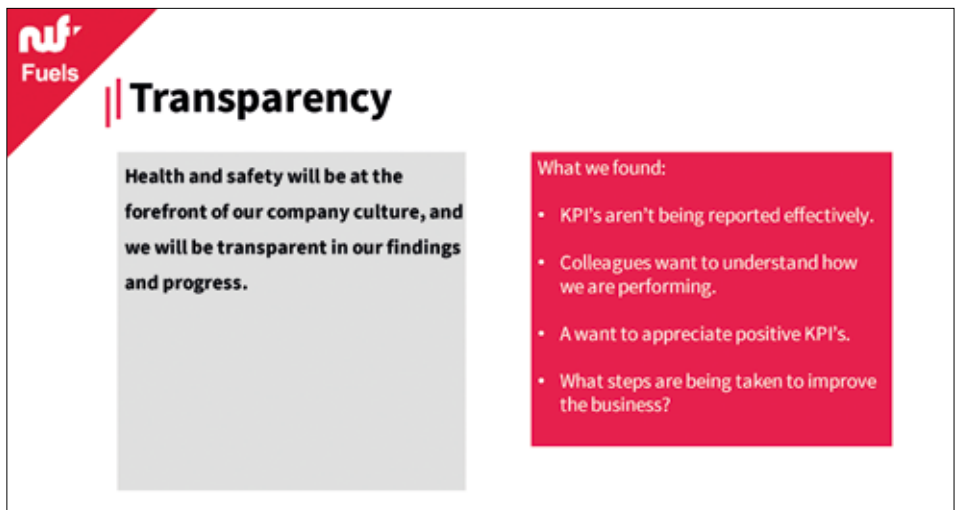
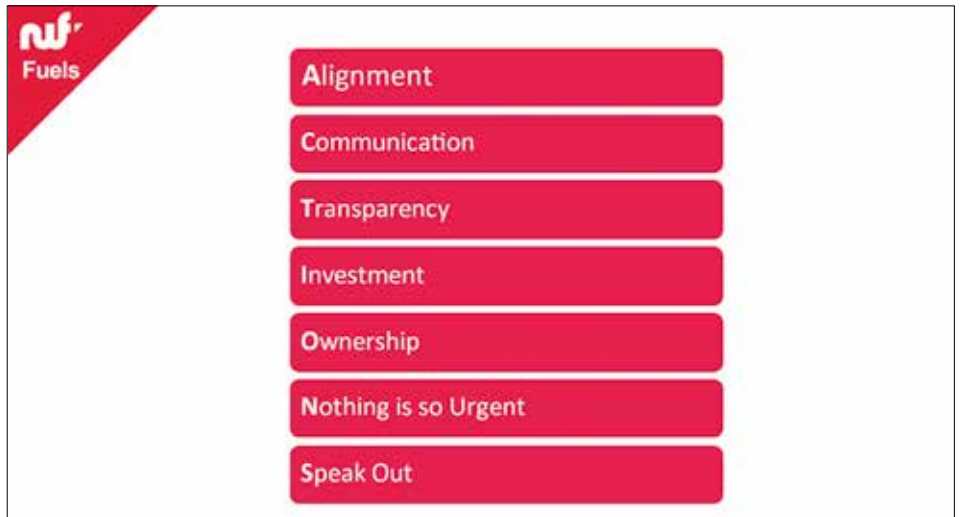
The training is based on an approach used in aerospace where safety is obviously a crucial element – if you put a plane together wrong it can drop out of the sky – and safety is just as important to us when you're talking about tankers full of fuel.

With the course modules lasting up to eight hours, it's a full day off the road each time for a driver and we're rolling it out to every driver across the business so that's a real investment from us.

To back up the skills and training delivery we're also about to launch a new health and safety platform which is a vital part of our commitment to our teams.

The platform will ensure that all accidents or incidents are logged but also, further into the rollout, it will enable drivers to log issues in real time. If they arrive at a customer and consider it unsafe to deliver, they will be able to use a tablet from the cab to take photos and upload the concern. This way the depot will be immediately aware of the issue and can begin to rectify it before the driver is even back.

It's a bit of a cliché, but we are genuinely fanatical about service and that includes being safe out on the road. So, it's giving our drivers



the tools to report issues and ensuring that we feed back to them as the issue is resolved.

That feedback is another vital aspect of delivering this health and safety culture. When a member of the team logs an issue, we need to ensure there's the feedback to say we've dealt with it, it's sorted, as well as putting a check in place so that, next time they go, we make sure it's resolved. If the first time anyone reports an issue, they don't feel listened to or get any feedback, they will stop doing it.

## How is the charter being received?

Every year we hold a sales conference to bring everyone together and this year's was the first opportunity for all the depot managers and teams to see the new safety charter. The feedback so far has been amazing – really, really good – everyone seems to have genuinely bought into it.

We're now delivering the same to the drivers and I'm asking for their feedback, as it's really important to me to understand what people are thinking so that we can get everyone on board. Throughout my career, I've found that you have to listen to the people

that do the job; don't make an assumption, sit in an office somewhere. Those people will give you invaluable feedback and often know the best way to achieve something because they do it every day. By speaking to them, you're not starting off with a mistake.

## I guess it would have been very easy for the management team to come up with a charter to improve the focus on safety which would create an immediate barrier of 'you didn't talk to us'?

Exactly! And that's what we've avoided with this because we've been out and spoken to our teams across the entire company, so it has been developed at depot level.

## Is there genuine buy-in throughout the company so that, for example, the first time a driver goes out to a delivery and decides that it is not appropriate to deliver will there be full support?

We've been rolling this out over the past couple of weeks across the depots and we've already had a couple of drivers report unsafe drops and ask what they should do. We log these in

a hazard report so that we can speak with the customer before the next delivery to get the issue resolved.

That's the culture shift. It's very satisfying that we're already getting drivers asking those questions.

With the new online reporting system, we'll be able to flag if feedback hasn't been provided to the person logging the issue. It means we can make sure we're closing off that loop and not losing engagement.

The reporting system itself will take about 12 months to roll out completely but, once it's fully embedded, I believe it will change the game. Giving drivers the opportunity to log issues on site and provide photographic evidence so that the depot teams can get onto it even before the driver gets back as well as ensuring the loop is closed off – that's game changing.

So here's the plan for the next twelve months:

- Upskilling the depot teams.
- Ensuring the toolbox talks are refreshed, interactive, and different.
- Implementing KPIs that are transparent to drivers and depots
- Ensure the key messages are communicated

### And what do you hope it will deliver?

What I'm looking for is that not only will drivers, staff, everyone, feel safe, but that it also helps us to deliver an amazing service.

Our strapline is 'fanatical about service' and we want to make sure we deliver phenomenal service to our customers.

Changing the culture around health and safety will also support an overall culture change across the business with us all on board and with the same ways of working but, importantly, still retaining the individual depot identities.

### One last question for you Luke; what's the best advice you've ever been given?

That's a very, very good question. I think, especially in this day and age, when people can become stressed and sometimes overwhelmed, it has to be something that one of my old bosses said to me – to take a step back, breathe and relax – to get a perspective. It may feel like it at the moment but is it actually the end of the world?

I found myself saying that to one of my team recently who was very stressed over a delivery mistake. Relax, everyone can make a mistake – it's going to happen – what can we do, moving forward, to try to avoid it?



The news safety charter being signed off by NWF Group Chief Executive Richard Whiting

If things are getting on top of you, take a step back and talk to someone about the best way to sort it.

Wise words from Luke and ones we would all do well to remember.

Health and safety is a perennial industry topic and what company doesn't consider a new initiative from time to time? What makes the NWF Fuels approach unique is the way it has been driven from the Aspire team project.

This will almost certainly make successful implementation far easier and we look forward to hearing how it progresses when we catch up with Luke in a future issue.



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# Adam Franklin of Greenergy Flexigrid

THE FUEL LOGISTICS SECTOR FACES MANY CHALLENGES AND CHANGES, SOME OF WHICH WILL BE PASSING AND SOME PERMANENT. WITH LONG ROOTS IN THE SECTOR AND A CURRENT ROLE HEADING UP THE LOGISTICS ARM OF GREENERGY **ADAM FRANKLIN**, CEO OF GREENERGY FLEXIGRID CONSIDERS THE CURRENT STATUS OF THIS VITAL PART OF OUR INDUSTRY, SHARING HIS THOUGHTS WITH MARGARET MAJOR, MANAGING EDITOR OF FUEL OIL NEWS.

## Can you give us a potted history of your background and how you came into your current role?

After attending university, I chose a career in logistics as something that I felt was a 'real' and vital industry for the UK economy and which offered multiple potential routes for development.

I joined the National Freight Consortium as part of their graduate scheme, before moving into the world of bulk transportation with Tankfreight. Progressing through a number of account, operational and functional roles (including IT and Safety), I was lucky enough to become a director of the business before picking up other sectors of what was then Exel Logistics and subsequently DHL, eventually becoming MD of the Industrial division covering customers in the utilities, engineering, construction, industrial manufacturing, publishing, and energy sectors.

Just over six years ago, I got the opportunity to join Greenergy, facing a completely new challenge working for a privately owned and highly entrepreneurial business, and taking on their in-house haulage business, Flexigrid. The strategy was to take a relatively small but very capable in-house operation and develop and scale it to support Greenergy's ambitious growth plans and to build a strong service-based and cost-effective culture underpinning our customer relationships.

Alongside this, the challenge was to develop a long-term business strategy that maximises the opportunities for both Greenergy's delivered-in product offer and those in the third-party logistics (3PL) market utilising Flexigrid's reach and capabilities as well as navigating through the energy transition and creating opportunities for our business.

## What does your role involve?

My focus is leading the business to deliver its strategy whilst ensuring that great service comes as standard for all our clients – internal and external. A key component to achieving this is continually setting the right tone and culture with Flexigrid's leadership team, with a strong focus on supporting the team to perform to their potential.

In a practical sense, each day consists of supporting the operational teams to review and set daily service targets, making sure the management team have the guidance they need to ensure we are delivering the essentials and meeting the needs of our customers.

I engage in as much face-to-face activity as possible – whether by travelling round the country to host driver reviews, engaging with our NNC teams or developing other means to encourage open and honest two-way communication.

An open-door policy is essential, as is ensuring everyone has a sense of our direction and purpose, and that we pick up on employee's ongoing and legitimate concerns and do something about them.

## What's the best business advice you've ever been given?

Take your opportunities and recognise you're only as good as the team you build around you.

## I believe this is your 7th year with Greenergy Flexigrid – what are the main developments you have seen in fuel logistics over that time?

It's certainly been an interesting period, especially with nearly two years 'lost' to Covid and the distractions and challenges this brought. However, in this time we've managed our way through driver, LGV Technician and equipment shortages, Just Stop Oil protests, a fuel crisis and the impact of the war in the Ukraine with the move away from Russian oil and the supply fragility this brought, along with sharply escalating prices and costs – seemingly from every direction.

Running alongside this, and gaining pace, is the drive towards decarbonisation and the transition to new, cleaner energy technologies.

These have all influenced this sector, with some reduction in capacity and capability, together with an increased customer sense of the value of reliable, resilient and flexible delivery capability. It's of no value to save some pence per litre on distribution costs if you haven't got any product.

The driver shortage has changed the face of the industry, not only by pushing up costs but also altering perspectives on risk and benefits of change, as well as making it imperative to get the most out of an essentially fixed cost base.

For the right businesses, this brings opportunity, even through the energy transition.

## How have you been impacted by the problem of driver shortages?

We were fortunate not to be heavily impacted by the shortages thanks to our strong reputation and proposition for drivers.

However, driver shortages elsewhere prompted the fuel crisis of late 2021 and led to wage inflation, which no company in this sector has been immune to.

## What role do telematics play in fleet management?

They're now a vital everyday part of the business for many, if not most, operators in this sector.

From the essential vehicle tracking through to in-cab forward facing cameras and the use of telematics to provide useful MI and support performance management tools, it's difficult to imagine winding the clock back to the days without it.

### **Have customer priorities changed over time? What tops their list of 'wants' from logistics provision?**

At a micro level, the absolute basics still apply – right product, on time and in full, and delivered safely – and preferably with as little noise or drama as possible.

On a broader level, clients are looking for increased security of supply but aligned to an ability to move with the inevitable shifts in this sector, especially as supply from time to time will remain tight. Everyone wants cost certainty – which is tough with current inflationary pressures. The lack of clarity and certainty in the energy transition space is another key challenge that customers are seeking answers to.

### **It's been exciting to follow Greenergy's journey as an early driver of lower carbon fuel to being at the forefront of the energy transition in the transport sector. What role is Flexigrid playing in delivering this transition?**

Flexigrid has an important role in helping test and prove technologies wherever we can, to help Greenergy provide carbon reduction solutions to customers.

The challenge for many businesses is how to do something now, whilst future emission-free technologies develop to the point where they are truly viable options. Low carbon fuels have a key part to play in the here and now.

For over a year, Flexigrid has been running a fleet of vehicles in the south-east on B20 high bio blend diesel to demonstrate the technology and operational effectiveness and establish real life costs, which, in turn, Greenergy can offer to customers. This has demonstrated that, with some nominal increased costs from more frequent maintenance (oil and filter change) intervals that are offset by improved fuel cost, this can deliver a 13% carbon improvement on a broadly cost neutral basis for LGV operators looking for CO2 savings today. We are rolling this out progressively across our fleet of over 200 trucks as well as investigating options for even higher bio blend percentages e.g. B30 to B50.

The other role Flexigrid plays is in supporting our Next Generation Renewables team, as they develop new waste-derived, renewable fuels, with logistics capability and inbound and outbound solutions. A good example is the capability and technical support for hydrogen distribution that has been developed.

### **Indeed! Congratulations on the recent Octopus Hydrogen partnership and the deliveries of the Nanosun units that have already taken place. What further developments do you see for Flexigrid in transportation of future fuels such as hydrogen?**

It remains to be seen exactly what role hydrogen will play in the mobility sector, but it will undoubtedly form part of the new energy picture.

We're working hard with a number of partners to develop scalable and flexible solutions that will help this sector grow.

The technology is moving on apace and, in many ways, the dilemma for many is investing in today's technology that will rapidly become yesterday's technology, as well as working out exactly where the opportunity and growth will lie.

Beyond hydrogen, we will definitely see the development of more sustainable fuels, which we may or may not be able to leverage through current infrastructure. It's vital we have a business strategy that can evolve and flex in this fast-moving part of the energy sector, and we continue to invest in our core business to ensure it remains as efficient and customer-focused as ever.

Liquid fuels, from whatever origin, will be here for some time yet.



### **In your experience is the rate of the energy transition increasing and where do you think more can be done to make a difference now?**

The rate is definitely increasing, though it will probably be many years before we see the inversion point, especially in the heavy haulage sector. Equally, in the fuels sector, it would be great to see the compliance regimes in oil terminals developing at a faster pace to consider how to support adoption of the new technologies.

As Chair of the RHA Tanker Group, I get to hear, and engage with, the thoughts of many operators, large and small. It's really difficult for hauliers, who enjoy an average 2-to-3-year contract life, to work out what technology to invest in, given the pace of change and the cost of investment in current BEV or hybrid technologies, all of which are assets with typical 5-7 year operational lives.

The things companies crave are certainty and direction – I've not heard a single haulier who doesn't want to be part of the energy transition, they're just unsure about which way to turn. I think that the growing gap between aspiration and reality will require further sources of new products to help achieve a zero-emission future.

### **Which fuels do you see having the biggest role to play in the decarbonisation of heavy transport?**

As outlined above, sustainable biofuels have a key part to play whilst, in time, I believe we will see viable BEVs as well as, potentially, BEVs with Hydrogen Fuel Cell range extenders and possibly even Hydrogen ICE vehicles.

HVO can play a role, particularly in lower mileage operations where the relative cost increase is less impactful. High bio blend diesel fuels can offer access to immediate CO2 savings on a much better cost position.

Longer term, the focus must be on new sources of raw materials – particularly from waste – to create sources of sustainable fuel production – such as the end-of-life project the Greenergy team are developing.

### **What are your hopes for the next 5 years?**

To continue to help Greenergy, and all our clients, to grow – even in a declining market, whilst also continuing to diversify services to ensure we maintain an efficient cost base and provide a long-term future for everyone.

We have just signed our first contract to provide bitumen distribution, building on our success in hydrogen and aviation distribution. This is the sort of 'near market' growth that helps to underpin the existing business and grow the capability of Flexigrid for all our clients.

### **And what does Flexigrid offer to the fuel distribution sector?**

A strategic partner able to deliver reliability, quality and safety with UK scale and real resourcing flexibility; all from a company that is here for the long term and committed to the sector and supporting clients with the energy transition.



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## “It is a capital mistake to theorise before one has data.”

WELCOME TO THIS EDITION OF KEN'S CORNER, WHICH HAS BEEN SPECIALLY EXTENDED FOR SUMMERTIME READING. THE TITLE COMES FROM THE GREAT DETECTIVE SHERLOCK HOLMES AND THE FULL QUOTE SITS ON MY OFFICE WALL: “IT IS A CAPITAL MISTAKE TO THEORISE BEFORE ONE HAS DATA. INSENSIBLY ONE BEGINS TO TWIST FACTS TO SUIT THEORIES, INSTEAD OF THEORIES TO SUIT FACTS.”

I know I bore for Britain when it comes to data, but it is so fundamental to what we are all trying to achieve. In this edition, we present the updated version of the UKIFDA Databank of our members and customers, which we use to demonstrate to the Government how policies and pathways impact our industry.

Every successful campaign, political or otherwise, has been firmly directed by the understanding and use of data. With so much happening in the political world, this edition brings together several strands to illustrate why data is of utmost importance.

### Our membership

I am pleased to report that our membership this year has risen by 8%. While I'm sure this increase is due to something we are doing right, I also acknowledge that this increase may be a result of the challenges we are facing as an industry and need to overcome in the future.

### By-elections

By the time this column has been published, we will know the results of the three by-elections called following the fall-out of the privileges committee report into behaviours in parliament. So, I am already in dangerous territory.

Ignoring the shenanigans in parliament, the by-elections are set against the aftermath of the pandemic challenges, including the ongoing cost of living crisis, high inflation, the Ukraine war, and the recent spike in mortgage rates. The impact of these, and future policy costs, will have undoubtedly played a crucial role in determining voting choices in rural communities.

Selby and Ainsty in Yorkshire is what I call a typical oil-heated constituency – rural, high oil heating numbers with a high Conservative majority.

The constituency data is interesting, it reveals that 11,000 homes use oil, which is more than twice the national average. 25% of these homes were built before 1919, and 40% of them are either detached or a bungalow, which is significantly higher than the national average. As these houses are larger, it is likely that more than 30,000 people live in them. When you consider that each constituency has roughly 70,000 voters, it becomes evident how crucial the oil heating vote is.

These households want to do their bit to support the UK's journey to net zero but they face a cliff-edge situation created by the Government's proposal to ban oil boiler sales in 2026. They need a realistic, affordable, and fair solution which this industry has now formally put forward to the Government in the shape of a renewable liquid fuel obligation and proposals to harmonise duty rates across all liquid heating products.

The outcome of this by-election will be an important pointer to the

Government on how rural communities feel.

### Climate Change Committee progress report

At the end of June, the Climate Change Committee (CCC) published a pretty damning review of the Government's progress towards meeting its climate change policy of net zero by 2050.

The document, at 438 pages, was a long read and probably, as a result, did not get the attention it deserved. Nevertheless, the report and previous CCC findings are essential in our ongoing discussions with government.

The CCC concluded that buildings remain the UK's second highest-emitting sector, accounting for 17% of total emissions and, since 2010, progress has stalled, with no further substantive reductions in emissions. “To reach Net Zero, the Government urgently needs to coordinate a shift in how the UK's 28 million homes and two million non-residential buildings use energy.”

The CCC continues to support the view that electrification is best, but acknowledges that there are some issues with off-grid homes regarding grid connections. The committee has been much more robust in its recommendations for hybrid biofuel boilers in this circumstance (its central scenario included 0.9m hybrid biofuel boilers). “The only potential limitation on electrification for these properties is the capacity of the electricity grid. It is likely that electricity distribution networks will need to be upgraded to meet demand; but not all rural areas (where a higher proportion of properties are off-gas) will have electricity grid upgrades immediately. Hybrid heat pumps with a biofuel boiler could offer a solution in these circumstances.”

The CCC goes on to say: “The Government needs to clarify its position on hybrid heat pumps”.

However, for our sector, the CCC report is in danger of possibly sending out mixed messages by calling for the Government to “publicly affirm that electrical heat is the default option in all new buildings and existing properties off the gas grid” and “finalise and ensure the timely implementation of plans to prohibit fossil fuel boiler replacements in off-gas grid buildings from 2026 (2024 for large non-residential buildings).”

There is no reason our customers should invest in a hybrid option that uses renewable liquid fuels that costs nearly as much as a conventional heat pump when they can simply drop in the fuel using their existing equipment. In fact, our Kehelland report, presented in parliament in April, outlines that this is by far the cheapest option.

It is encouraging that the CCC endorses the use of renewable liquid fuels, but we must get the theory to suit the facts, as Mr Holmes would say.

I hope this summer you have as many adventures as he.



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# OUR MEMBERS

UKIFDA represents 121 distributors who, in turn, deliver c90% of the UK's heating oil directly to consumer homes via almost 12,000 employees and 500 local depots across the country. The majority of UKIFDA members are small, family-run, local businesses.

In contrast, in June 2018 there were 70 active gas and electricity suppliers. This has reduced to 26 currently.

The market is dominated by small, local, family-run businesses with less than 10 trucks. This provides significant price competition as a consumer, typically, has around 4 different distributors within a 30-mile radius of their home.

Total members		
Region	2022	2023
UK	151	163
Ireland	26	28
<b>Total</b>	<b>177</b>	<b>191</b>

**8%**  
Total membership has increased **8%** in 2023



Trucks		
Region	2022	2023
UK	3193	3363
Republic of Ireland	333	366
<b>Total</b>	<b>3526</b>	<b>3729</b>

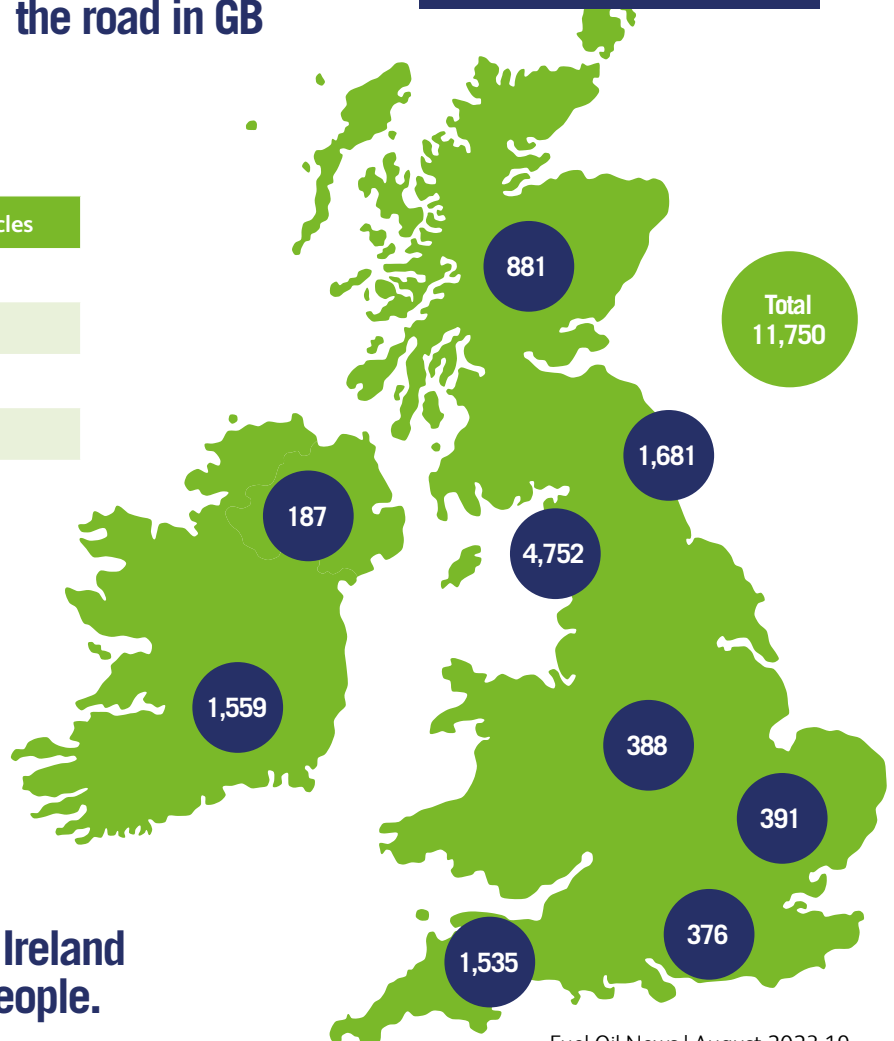
**c90%**  
UKIFDA represents **c90%** of trucks on the road in GB



Where employees are located

Number of trucks per company		
	Number of companies	% of total vehicles
1-10	61	9%
11-50	27	21%
51-100	8	16%
>100	6	54%

Number of employees		
Region	2022	2023
UK	10,606	10,191
Republic of Ireland	1,353	1,559
<b>Total</b>	<b>11,959</b>	<b>11,750</b>



**12,000**  
Our members across the UK and Ireland directly employ nearly **12,000** people.

# OUR CUSTOMERS ENGLAND

The data shown comes from census 2021 which provided options for households to choose two forms of heating. According to the census, 8% of homes have two or more forms of heating, excluding renewables such as solar and heat pumps. The census shows that the number of oil-heated homes has dropped 3% since the last census. It is likely that many oil-heated homes are in the Two+ (excluding renewables) number as they will have chosen oil and another form of heating such as wood.

Type of central heating		
	Total	%
None	351,632	2%
Mains gas	17,334,040	74%
Tank or bottled gas	232,512	1%
Electric	2,041,989	9%
Oil	760,470	3%
Wood	31,032	0%
Solid fuel	41,967	0%
Renewable energy	92,396	0%
District or communal heat networks	216,543	1%
Other	217,543	1%
Two+ (excl. renewable)	1,989,259	8%
Two+ (incl. renewable)	126,690	1%
<b>Total</b>	<b>23,436,073</b>	<b>100%</b>

Tenure		
	Oil homes	All England homes
Owner occupied	85%	65%
Private rented	14%	18%
Local authority	0%	7%
Housing association	2%	10%

Dwelling age		
	Oil homes	All England homes
Pre-1919	43%	20%
1919-44	6%	15%
1945-64	12%	17%
1965-80	20%	20%
1981-90	7%	7%
Post-1990	12%	21%

Type of central heating										
Type of central heating	North East	North West	Yorks. & Humber	East Midlands	West Midlands	East of England	London	South East	South West	Total
Mains gas	79%	79%	78%	76%	75%	70%	71%	75%	67%	74%
Tank or bottled gas	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%
Electric	5%	7%	6%	6%	8%	9%	13%	9%	10%	9%
Oil	2%	1%	2%	4%	3%	7%	0%	3%	7%	3%
Two+ (excl. renewable)	10%	8%	9%	8%	9%	8%	8%	8%	9%	8%

Type		
	Oil homes	All England homes
All terrace	8%	27%
Semi-detached	19%	25%
Detached	58%	18%
Bungalow	16%	7%
Converted flat	0%	4%
Purpose-built flat, low rise	0%	16%
Purpose-built flat, high rise	0%	3%

Total usable floor area		
	Oil homes	All England homes
Less than 50m2	1%	10%
50 to 69m2	7%	22%
70 to 89m2	9%	27%
90 to 109m2	14%	15%
110m2 or more	68%	26%

Energy efficiency rating (EER) band (% of all in group)						
	A/B	C	D	E	F	G
All homes	3%	43%	43%	8%	2%	1%
Oil	0%	9%	42%	33%	15%	1%

Off-grid, oil-heated homes are very different to what could be described as the UK average, or normal, as can be seen by these data tables.

The highest oil numbers are experienced in South West England and East of England.

Data sources: Census 2021 and the English housing survey 2020



# OUR CUSTOMERS WALES

The data shown comes from census 2021 which provided options for households to choose two forms of heating 9% of homes according to the census have two or more forms of heating excluding renewables such as solar and heat pumps. The census shows that the number of oil-heated homes has dropped 8% since the last census. It is, again, likely that many oil-heated homes are in the Two+ (excluding renewables) as they will have chosen oil and another form of heating such as wood.

Type of central heating		
	Wales	%
None	15,497	1%
Mains gas	964,685	72%
Tank or bottled gas	27,590	2%
Electric	71,122	5%
Oil	105,468	8%
Wood	4,693	0%
Solid fuel	7,491	1%
Renewable energy	6,336	0%
District or communal heat networks	4,369	0%
Other	7,838	1%
Two+ (excl. renewable)	124,065	9%
Two+ (incl. renewable)	7,960	1%
<b>Total</b>	<b>1,347,114</b>	<b>100%</b>

Type of area		
Main heating fuel	Urban	Rural
Gas	93%	59%
Oil	–	28%
Electricity	4%	8%
Solid	–	4%

28% of rural dwellings use oil, which is much higher than the overall proportion for Wales (10%).

16% of pre-1919 homes are heated by oil, which is a much higher proportion than other age groups.

The oil-heated homes tend to be detached, larger and older than the average, as well as rurally based and dominated by home ownership.

Oil homes are predominantly detached.

Owner-occupied dwellings are more likely to use oil than the other tenures, and the private rented sector are more likely to use electricity than the other sectors.

Construction date					
Main heating fuel	Pre-1919	1919 to 1944	1945 to 1964	1965 to 1980	Post-1980
Gas	75%	86%	90%	85%	80%
Oil	16%	–	6%	8%	9%
Solid	–	–	–	–	–
Electricity	5%	–	–	4%	9%
Other	–	–	–	–	–

Dwelling type					
Main heating fuel	Bungalow	Terraced	Semi detached	Detached	Flat
Gas	72%	92%	88%	71%	75%
Oil	18%	–	8%	24%	–
Solid	–	–	–	–	–
Electricity	–	5%	–	–	20%
Other	–	–	–	–	–

Tenure			
Main heating fuel	Owner -occupied	Social housing	Private rented
Gas	81%	87%	80%
Oil	12%	5%	7%
Solid	2%	–	–
Electricity	4%	5%	12%

Data sources: Census 2021 and Welsh housing condition survey 2018

# OUR CUSTOMERS SCOTLAND

6% of Scottish homes are heated by oil, with larger concentrations in rural and remote areas. Typically, oil-heated homes across Scotland are distinctly different in character; they tend to be older, detached and larger. In addition, in keeping with the age and character of these homes, their energy efficiency tends to be significantly lower than the Scottish and UK averages.

## Number of dwellings by primary heating fuel of households and tenure 2021 in '000s

Primary heating fuel	Owner occupied	Private rented	Social sector	All sectors	%
Mains gas	1,293	257	478	2,027	80%
Electricity	124	70	76	270	11%
Oil	126	18	3	146	6%
Communal heating	6	7	19	32	1%
LPG bulk or bottled	23	2		26	1%
Solid mineral fuel	9	3		14	1%
Biomass	8	3		12	0%
<b>Total</b>	<b>1,589</b>	<b>362</b>	<b>578</b>	<b>2,529</b>	<b>100%</b>

## Number of dwellings by primary heating fuel and urban rural location 2021 in '000s

Primary heating fuel	Urban	Rural	% Rural
Mains gas	1,858	169	8%
Electricity	188	82	30%
Oil	20	127	87%
Communal heating	31		0%
LPG bulk or bottled		24	92%
Solid mineral fuel	3	10	71%
Biomass	3	9	75%
<b>Total</b>	<b>2,107</b>	<b>423</b>	<b>100%</b>

**87% of Scottish homes using oil are rural, compared to only 8% for gas.**

## Proportion of oil-heated and all dwellings by dwelling type and age

	Detached	Semi-detached	Terraced	Tenement	Other flats
Oil	78%	15%	5%	–	1%
All heating fuels (inc oil)	23%	20%	21%	24%	13%
	pre-1919	1919-1944	1945-1964	1965-1982	post 1982
Oil	40%	9%	13%	13%	26%
All heating fuels (inc oil)	19%	11%	21%	22%	27%

## EPC band

	ABC (%)	DE (%)	FG (%)
Gas	58%	42%	1%
Oil	8%	73%	18%
Electric	32%	56%	11%
Other fuel type	44%	42%	14%

## Proportion of dwellings by number of bedrooms and primary heating fuel type

Primary heating fuel	2 or fewer bedrooms	3 bedrooms	4 or more bedrooms	All Dwellings
Gas	46%	36%	18%	100%
Oil	22%	31%	46%	100%
Electric	75%	20%	5%	100%
Other fuel types	63%	31%	6%	100%
All fuel types	48%	34%	18%	100%

Data sources: Scottish Housing Condition surveys 2021 & 2019



# OUR CUSTOMERS NORTHERN IRELAND

The data shown comes from census 2021 which provided options for households to choose two forms of heating. 15% of homes, according to the census, have two or more forms of heating excluding renewables such as solar and heat pumps. The census shows that the number of oil-heated homes has dropped by 49% since the last census. It is likely that many oil-heated homes are in the Two or more as they will have chosen oil and another form of heating such as wood.

## Number of dwellings by primary heating fuel of households 2021

Primary heating fuel	Number	%
Electric (for example storage heaters) only	12,167	2%
Mains gas only	242,805	32%
No central heating	2,428	0%
Oil only	380,547	49%
Other central heating only	2,017	0%
Renewable heating system only	2,589	0%
Solid fuel (for example coal) only	4,279	1%
Tank or bottled gas only	5,891	1%
Two or more types of central heating	115,299	15%
Wood (for example logs or waste wood) only	787	0%
<b>Total</b>	<b>768,809</b>	<b>100%</b>

Historical records show that c62% of homes use oil.

## Energy Efficiency Rating bands

	A-C	D	E	F-G
Total NI	49.40%	36.40%	11.20%	3.00%
Oil	37.80%	45.20%	14.40%	2.60%
Gas	87.50%	12.10%	0.20%	0.20%

## Number of dwellings by primary heating fuel and tenure 2021

Tenure	Gas	%	Oil	%	Other	%
Owner occupied	95,800	53%	363,920	69%	33,480	58%
Private rented and others	27,010	15%	96,280	18%	12,290	21%
Social housing	58,630	32%	50,650	10%	11,610	20%
Other			15,340	3%		
<b>Total</b>	<b>181,440</b>	<b>100%</b>	<b>526,190</b>	<b>100%</b>	<b>57,380</b>	<b>100%</b>

## Number of dwellings by primary heating fuel and construction date 2021

Construction date	Total NI	%	Oil	%
Pre- 1919	81,630	10%	49,550	9%
1919-1944	67,600	9%	42,430	8%
1945-1964	126,150	16%	78,210	15%
1965-1980	189,400	24%	132,500	25%
Post 1980	315,220	40%	223,500	42%
<b>Total</b>	<b>780,000</b>	<b>100%</b>	<b>526,190</b>	<b>100%</b>

The mix of home ages is similar but, as a total percentage, the oil homes tend to be older and less energy efficient.

## Number of dwellings by primary heating fuel and urban rural location 2021

	Whole of NI	%	Oil	%
Total rural	277,110	36%	233,890	44%
Total urban	502,890	64%	292,300	56%
<b>Total</b>	<b>780,000</b>	<b>100%</b>	<b>526,190</b>	<b>100%</b>

Oil homes are split evenly between rural and urban locations, while gas is, predominantly, an urban fuel.

# OUR CUSTOMERS IRELAND

39% of homes in Ireland are oil-heated, and the age profile, while similar to gas, reflects the fact that no oil homes have been built in the last 10 years. Oil-heated homes are split evenly between urban and rural, whereas gas is predominantly an urban fuel. Oil homes are mostly detached, whereas gas tends towards semi-detached and flat-based living. Energy performance tends to be similar to gas homes.

## Number of dwellings by primary heating fuel of households

Primary heating fuel	No. of homes	%
Oil	714,177	39%
Natural gas	601,339	33%
Electricity	216,075	12%
Coal (incl. anthracite)	63,437	3%
Peat (incl. turf)	67,891	4%
Liquid petroleum gas (LPG)	11,874	1%
Wood (incl. wood pellets)	31,854	2%
Other fuels	16,916	1%
No central heating	21,254	1%
Not stated	91,911	5%
<b>Total</b>	<b>1,836,728</b>	<b>100%</b>

Oil homes are split evenly between rural and urban locations, while gas is, predominantly, an urban fuel.

## Number of dwellings by primary heating fuel and construction date 2021

Year built	All households	%	Oil	%	Gas	%
Before 1919	154,290	8%	62,911	9%	35,823	6%
1919 to 1945	113,788	6%	43,559	6%	37,510	6%
1946 to 1960	132,276	7%	47,786	7%	53,847	9%
1961 to 1970	122,685	7%	50,397	7%	47,656	8%
1971 to 1980	224,733	12%	111,159	16%	69,460	12%
1981 to 1990	185,556	10%	85,136	12%	52,805	9%
1991 to 2000	267,186	15%	109,990	15%	87,922	15%
2001 to 2010	450,817	25%	170,943	24%	164,405	27%
2011 to 2015	49,160	3%	16,834	2%	16,864	3%
2016 or later	93,128	5%	8,702	1%	29,506	5%
Not stated	43,109	2%	6,760	1%	5,541	1%
<b>Total</b>	<b>1,836,728</b>	<b>100%</b>	<b>714,177</b>	<b>100%</b>	<b>601,339</b>	<b>100%</b>

## Number of dwellings by primary heating fuel and urban rural location 2021

Location	All Homes	Oil	Gas
Rural	36%	59%	2%
Town	64%	41%	98%

## Number of dwellings by primary heating fuel and type

	All homes	%	Oil	%	Gas	%
Detached house	715,133	42%	445,404	65%	85,670	15%
Semi- detached house	471,948	28%	165,422	24%	235,910	41%
Terraced house	284,569	17%	61,595	9%	162,887	29%
Flat	204,145	12%	9,199	1%	80,076	14%
Not stated	21,870	1%	4,384	1%	4,623	1%
<b>Total</b>	<b>1,697,665</b>	<b>100%</b>	<b>686,004</b>	<b>100%</b>	<b>569,166</b>	<b>100%</b>

Data sources: Census 2016 & 2022



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# A DAY IN THE LIFE...

George Brinkworth

WELCOME TO OUR FEATURE WHERE PEOPLE FROM MANY DIFFERENT ROLES IN THIS INDUSTRY WILL TAKE YOU THROUGH A TYPICAL DAY IN THEIR WORKING LIFE. THIS MONTH, FUEL OIL NEWS SPEAKS WITH **GEORGE BRINKWORTH**, FUEL SUPPLY AND PRICING COORDINATOR AT FORD FUELS, AND WINNER OF THE UKIFDA YOUNG PERSON OF THE YEAR AWARD, TO DISCOVER HOW GEORGE SPENDS A TYPICAL DAY.



## MY ALARM GOES OFF AT...

6:05am.

## THE FIRST THING I DO IS...

Check my phone for any emails that have come in overnight to see if there are any operational issues with fuel supply into the depots that need to be dealt with. I will also look at my calendar for the day ahead.

## I PREPARE FOR THE DAY AHEAD BY...

Having a nice hot shower, followed by a large cup of coffee and breakfast. I find I need these three things to function.

## I CAN'T LEAVE THE HOUSE WITHOUT...

My phone.

**MY TYPICAL DAY** – I don't really have a typical day – but if I am at home then it's a very short, and quick, 10-minute commute to work. So, I will leave at 7:05am, to be at my desk at 7:15am. However, if I'm at my girlfriend's house I will leave Bristol at 6:40am, to be in the office at 7:15am.

Each start to the day involves a discussion with my team. We review the closed Platts market movements from the previous day, analyse the sales/quotes and margins and review stock prices and external factors which could influence the market. From here, I set base prices for the fuel products across the group.

Throughout the day, I undertake general account management, negotiate prices and build and maintain key relationships with customers and suppliers.

I purchase the product in several ways; off the live market, triggered and hedged back. With this comes operational and haulage difficulties, although there is excitement at the same time! As well as this, I am responsible for pricing all unpriced orders.



In my role, it's very important to keep an eye on the live market movements and market talk, as we all expect the unexpected to happen when it comes to the fuel industry. It has been no secret that prices, and supply, have been more than unusual for the last three years. Between all of that, I go for lunch at 1pm, and I am lucky to have my gym and golf club across the road, so I will either have a quick gym session or hit some balls on the driving range. I find this is beneficial for productivity in the afternoon!

## MY MOST MEMORABLE WORK MOMENT...

When my 1-year-old nephew visited the office; it was very cute to see him! No doubt he will love the fast-paced working environment when he's older!

## THE WORST PART OF MY JOB...

Hearing domestic customers' cost-of-living difficulties.

## THE BEST PART OF MY JOB...

Building and maintaining relationships with customers and suppliers and also closing deals on large contracts.

## I RELAX AFTER WORK BY...

Hitting some balls on the driving range or jumping in the steam room at my gym.

## MY FAVOURITE MEAL IS...

Evening meal. I like to keep fit and whether that's an after-work gym workout or 18 holes on the golf course, it always works up an appetite for a delicious dinner.

## ON MY BEDSIDE TABLE IS...

David Goggins and Ross Edgley book. Apple watch charger, phone charger and lamp.

## THE LAST THING I DO EACH DAY IS...

Set my alarm, and check my phone isn't on silent.

## I'M NORMALLY IN BED BY...

9:30pm to 10:00pm.



# Creating business value through a clear roadmap



IN A RAPIDLY TRANSITIONING SECTOR, MANY OF THOSE IN OUR COMMUNITY OF DISTRIBUTORS FIND THEMSELVES CONSIDERING THEIR FUTURE BUSINESS PROSPECTS. THE CHOICE TO EITHER INVEST IN GROWING, OR EVOLVING, THE BUSINESS TO SEIZE FUTURE OPPORTUNITIES, OR TO PLAN FOR A SECTOR EXIT, WHETHER BY RETIRING, SELLING OR DIVERSIFYING, CAN BE AN EXTREMELY DIFFICULT ONE TO MAKE. HERE WE HEAR FROM CORPORATE FINANCE SPECIALIST, **OLIVER NEWBOLD**, A PARTNER AT LEADING ACCOUNTANTS RANDALL & PAYNE, WHO GUIDES US THROUGH THE PROCESS OF DECIDING THE RIGHT OUTCOME FOR YOUR BUSINESS.

We recently had the pleasure of attending the UKIFDA Conference at the Coventry Arena in May. From the numerous conversations we had, we were able to see a common theme emerging. Despite some of the changes in the industry, like the adoption of future fuels and some of the challenges around recruitment etc., conversations very clearly centred around two topics: either Business Growth or Business Exit.

## Finding the route ahead

Acquisition is a common way to expand geographical influence and increase volumes in the sector. Additionally, strategic acquisitions can deliver enormous financial benefits as some geographies can achieve better margins than others, and the geography of depots can play a significant role in maximising profitability.

On the other side of the equation, we had some tentative conversations with business owners who can see some big changes in the industry coming down the track and are beginning to feel a little cautious about what this means for them and their legacy.

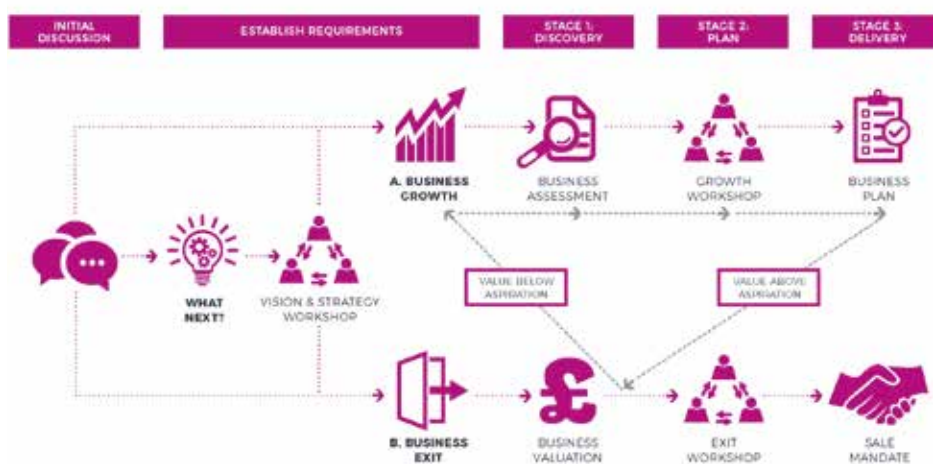
Whilst many clients engage with us knowing exactly what they want and how they wish to proceed in the next step of their business life cycle, we have a number of clients who also come to us feeling uncertain as to which route to take – knowing that something needs to change but they are not sure what.

Using this process, we can lead the client through the appropriate journey depending on what success means to them.

## The client considering options

This is typically a client where business may have felt challenging over recent years for several reasons. They want to take steps for change, but the direction and approach feel uncertain. The first key step is a vision and strategy workshop to develop a clear path. This process allows the client to share some of the challenges they have faced and explore

## Value Creation Client Roadmaps



the options available to them. It also allows the client to move from a crossroads to clearly identify a path and an ultimate destination: **either Business Growth or Business Exit.**

## Business Growth

Where our client is certain that growth represents the next step in their journey, we initially undertake a benchmarked review of the business from an operational, management and financial perspective which allows us to establish areas that are adding value and opportunities for improvement. This directly feeds into a Growth Workshop which helps digest and fully understand the assessment. Finally, a Business Plan pulls together the key steps over a medium term where actions can be tracked.

## Business Exit

The critical first step in this process is to understand the value of the business based on comparable transactions undertaken in the sector. If the value does not meet requirements, then the process loops back into Business Growth to improve value. If, however, the value

meets with client requirements then an Exit Workshop helps run through the key points of the valuation and sets out the options available in terms of establishing an Exit process, as there are a number available. Typically, we then move into a Sale Mandate process where the business is, initially anonymously, presented to a tailored list of potential buyers. This competitive process is a tried and tested approach of achieving best value.

## Summary

This is a whistle-stop tour of a detailed and involved process. As a result of the relatively recent uptick in trading performance throughout the COVID period, there is no shortage of cash-rich businesses looking to achieve growth through key acquisitions. Happily, there is a good mix of the size and nature of these acquisitive organisations, so sellers are likely to find an appropriate buyer.

*If you are one of those businesses uncertain of the path ahead, you can find out more about the process by contacting Oliver: oliver.newbold@randall-payne.co.uk*



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# A case study: software that is maximising flexibility in fuel deliveries



Greenery Flexigrid Ltd (Flexigrid) is the wholly owned logistics business for Greenery.

Originally founded to supply low-emission diesel, Greenery has built its business on minimising the impact of its operations, providing lower carbon renewable fuels to commercial and retail customers. Now Europe's largest manufacturer of biodiesel from waste the company continues to invest in development fuels that will help drive decarbonisation.

Supplying some 18 billion litres of fuel annually, Greenery manages fuel supply chains from refinery gates to customer sites which requires a high level of both flexibility and efficiency.

Flexigrid provides specialist fuels distribution and logistics services to both retail and commercial sectors, employing more than 600 drivers and 70 support staff throughout the UK. Each day, Flexigrid fuel deliveries comprise some 600 routes across two shifts.

As a 24/7 logistics business, Flexigrid needed to integrate commercial and retail delivery planning to make scheduling and demand planning faster, easier and more efficient. The solution they chose was AMCS Fuel Planner and Rachel Bligh, IT manager for logistics at Flexigrid, and James Herbert, Greenery's head of IT & security, talk about the benefits the software has brought to the business.

## The challenges

Offering products and services that span the entire length of the fuel supply chain requires intensive and complex logistics and it is Flexigrid's flexibility and resilience that differentiates them. According to James, the company's logistics activities have undergone a significant evolution.

"Flexigrid was set up initially to handle Greenery's commercial haulage," he explains. "But, as the business expanded further, a second system was added for retail logistics. However, this meant the business was operating two programmes separately within the same system which affected flexibility and restricted growth potential."

Rachel continues: "Working with two separate systems was impacting flexibility, as we were unable to utilise excess vehicles

and drivers from one side of the business to meet demand peaks on the other side of the business. Scheduling with AMCS Fuel Planner has improved this."

"Bringing the commercial and retail operations together into a single system has allowed us to combine planning, which makes cross-business delivery routing possible and the scheduling much more effective and efficient."

## Powerful algorithms

Rachel goes on to explain how the vendor inventory management capabilities have improved delivery accuracy and efficiency, reducing needless fuel costs and emissions.

"This is a benefit that has immediately impacted business results. Where, before, a delivery could sometimes not be made, after the implementation of the AMCS Fuel Planner system we have the ability to manage the customer's inventory and have seen a real reduction in the number of trucks returning with undelivered fuel as a result.

"The powerful algorithms of AMCS Fuel Planner have taken that service capability to the next level."

These algorithms allow the system to not only build the most efficient and cost-effective route, but also, uniquely, include the product price and product availability, honouring contractual obligations within its route planning.

Timely updates throughout shift patterns make accurate, real-time information available for billing as well as generating a significant amount of information enabling enhanced visibility to support business decisions.

## Operational efficiency

Reducing the resource needed for daily route planning has also improved operational efficiency.

Under their old system, a team of five would create the schedules. On a like-for-like basis, regular planning work now requires the equivalent of two full time employees, freeing up resources for other logistics activities, as well as analysis that will drive further efficiencies.

## Competitive advantage – flexibility

Flexigrid, prides itself on offering the highly flexible delivery solutions that the name implies

and the system enables them to coordinate a positive response whenever something in the market changes. Enabling them to offer maximum flexibility, even during particularly volatile market conditions, further differentiates the business.

## So why AMCS Fuel Planner?

'We already had experience with AMCS's customer portals that we used alongside our previous system, so we were aware of some of the capabilities,' says Herbert.

"When we ran the process, it was the power of AMCS' algorithm that was the key differentiator among the available options we considered. We felt that the capabilities were truly next level and would deliver big improvements over our old system. It has proven to be a great success."

## Any advice?

The implementation was not without its challenges, however. "Our absolute number one piece of advice to anyone considering implementing this type of system," says Rachel, "would be to invest time and effort in training your people and help them understand the 'how and why' of the new system."

"Understandably, it can take some time for a team of planners, used to working all out to coordinate deliveries under very tight deadlines, to trust that the system is reliable enough to do that high-pressure work and generate accurate planning."

Rachel also highlights the risk of underestimating the amount of change a more efficient system makes to the team's daily workload making careful change management essential.

"Getting everyone on board as early as possible is crucial. Implementing the system in stages can also allow time for users to understand what the system can and cannot do and see a trustworthy output which maximises buy-in."

And James agrees, adding: "It is important that both the selection and the implementation for this type of solution is business-led.

"For a transport-heavy business with complex logistics such as ours, this is not simply an IT solution. It is a core business system."

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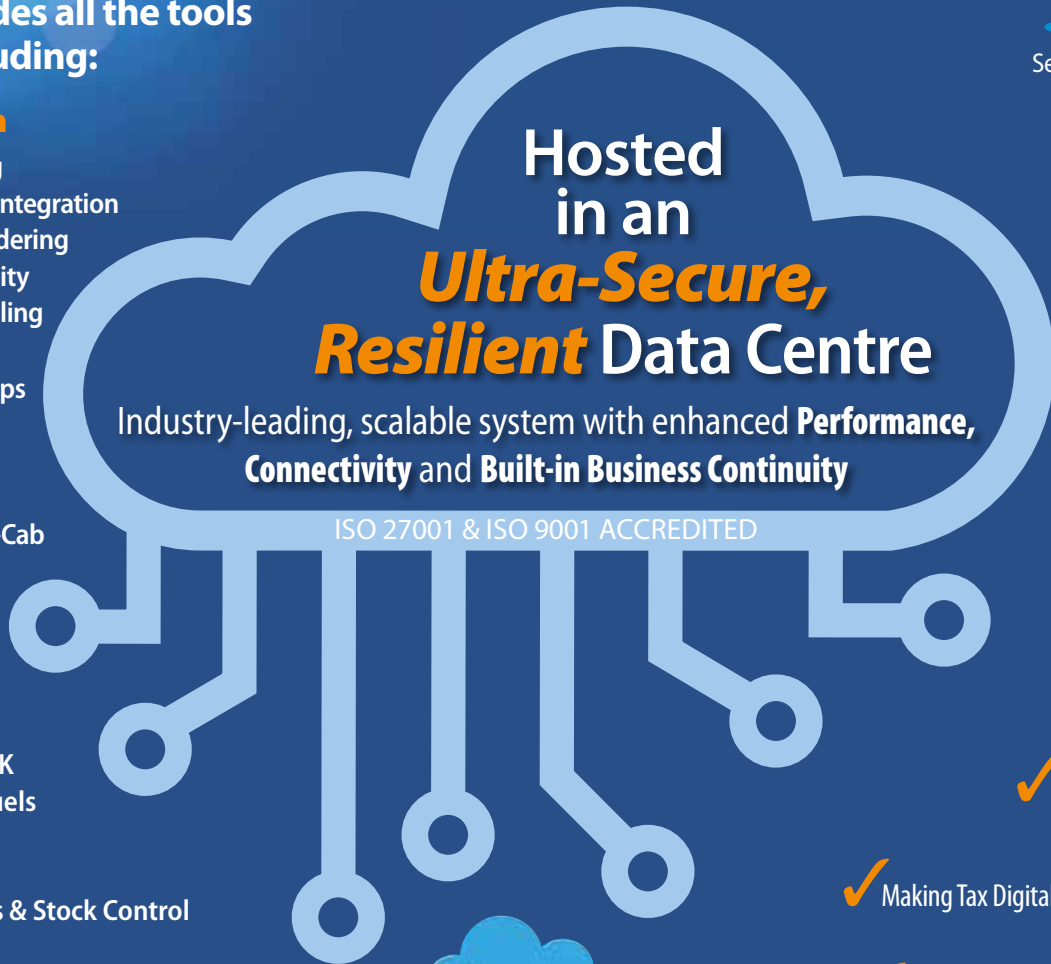
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# PORTLAND MARKET REPORT

JULY  
IN VIEW

THE ROAD TO HELL IS PAVED WITH GOOD INTENTIONS. FURTHER UNINTENDED CONSEQUENCES OF WESTERN SANCTIONS.

Last month's report highlighted that Russian exports of oil had actually increased since the invasion of Ukraine, thus highlighting the failure of Western sanctions. One of the key enablers of this unexpected surge in exports has come through the so-called maritime "Dark Fleet", which now accounts for over 50% of Russia's oil sales

The shipping industry has, sadly, never been much of an exemplar for scrupulous standards. From poor labour conditions to eye-wateringly complex ownership structures, ship-owners across the world have often excelled at operating beyond public scrutiny. Just look at the quite ludicrous Flags of Convenience system, whereby over 40% of the world's ships are registered with either Panama, Liberia or the Marshall Islands! This, to minimise legislative, environmental and legal burden in case of catastrophe. That isn't to say that there aren't blue-chip fleets out there, operating to the very highest standards. But in an industry as fragmented as international shipping, there are far too many companies operating in the shadows, and these make perfect converts to the world of dark shipping.

**"THERE ARE FAR TOO MANY COMPANIES OPERATING IN THE SHADOWS."**

The Dark Fleet itself is estimated to be made up of around 1,000 ships in total, and this equates to around a tenth of the global tanker fleet. Even prior to the Ukraine invasion, ageing tankers – some over 50 years old – were plying their trade to sanction-hit destinations such as Iran, Venezuela and North Korea. Iran itself has around 200 active Dark Fleet tankers and Venezuela has around 125. But, since the invasion of Ukraine, the numbers of dark ships have surged and the fleet has doubled in size. Russian shipments account for the largest part of the Dark Fleet with over 600 ships (crude + product tankers) and it is estimated that this

fleet now makes up 80% of all opaque tanker movements.

Sailing with their maritime transponders switched off, dark fleet vessels are almost impossible to track and trace. The vessels are frequently renamed and repainted whilst at sea and documents are constantly falsified. As efforts increase to monitor these ships, so does the counter-subterfuge from the ship owners. Dark fleet vessels now frequently engage in a new technique called 'spoofing', whereby military-grade software is used to manipulate AIS signals (transponders), thus disguising the ship ID, location and route. Other activities to avoid 'capture' involve the transshipment of liquid cargoes to another vessel mid-voyage. Such transshipments in open waters (rather than in sheltered anchorages and ports) are operationally challenging and present tremendous environmental hazards. Spillages are commonplace. Another favoured tactic is to quickly land Russian product at busy (non-sanctioned) oil terminals, where the oil can be blended with 'legitimate' oil and thus lose its Russian provenance. This then allows exports of the oil as a non-sanctioned product. An example of this practice can be seen in Malaysia, where the country is managing to export twice as much oil as it actually produces – no prizes for guessing how this is being done.

Hopes to counter dark shipping activities were initially pinned on the insurance market. Prior to the invasion of Ukraine, 95% of the global oil fleet was insured by Protection & Indemnity (PI) Clubs in London. If insurance was withheld, surely then the illicit shipping would cease? After all, even the most reckless of operators would never take the risk of shipping millions of dollars of uninsured cargo. However, as soon as the London PI Clubs pulled cover (as part of the sanctions programme), new and shady PI clubs cropped up, almost certainly Russian-owned. These insurance outfits have, of course, never been tested in anger and how reliable they would be if (for example) a tanker ran aground in the Bosphorus, is anybody's guess. But such is the lucrative nature of current dark fleet shipping rates, many ship owners are willing to take the risk or, worse, are simply sailing without

insurance cover at all.

This makes for a bleak and worrying picture. Here we have an aged and secret fleet, largely designed for short-sea shipping, but now carrying hazardous cargoes half-way around the world with inadequate (or no) insurance. It used to take 4-5 days to ship Russian oil from the Baltic ports (Primorsk, Kozmino and Novorossiysk) to the Amsterdam-Rotterdam-Antwerp trading hub, but now it takes up to 6 weeks to sail to the new refining destinations of the Middle East, India and China. Perhaps this was always the inevitable result of the western sanctions programme, which were applied for the right reasons but seem to have worked for neither the oil trade, nor the shipping movements that go with it.

**"EVEN THE MOST RECKLESS OF OPERATORS WOULD NEVER TAKE THE RISK OF SHIPPING MILLIONS OF DOLLARS OF UNINSURED CARGO."**

Good intent does not necessarily equate to good outcomes and until there is a far wider global consensus that includes the operational sea lanes of West Africa, Malacca and the Black Sea, then the Dark Fleet may continue to grow and the ships involved will never come back into the light.

For more pricing information, see page 38

Portland  
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# TRANSITION TALK

## “There’s no one-and-done solution – but that’s what makes decarbonisation so exciting.”

CONTINUING OUR SERIES OF INSIGHTS ON THE TRANSITION FROM THOSE BOTH WITHIN AND OUTSIDE OF OUR SECTOR, WE TALK WITH MARK DEENEY, THE RECENTLY APPOINTED RENEWABLES DIRECTOR AT CERTAS ENERGY. HAVING RECENTLY JOINED THIS SECTOR AFTER MORE THAN 15 YEARS IN RENEWABLES, MARK SHARES HIS THOUGHTS ON THE PAST, PRESENT, AND FUTURE OF RENEWABLE ENERGY TRANSITION, AND HOW THE KEY TO LONG-TERM SUCCESS MAY LIE IN A MORE COMPREHENSIVE, CROSS-SECTOR COMMITMENT TO DECARBONISATION.

### Early evolutions and seismic advances

Until I joined Certas Energy, I was more focused on the displacement of fossil fuels with renewable technologies or retaining fuel with bivalent systems to reduce the amount of fuel consumed. However, once I joined Certas Energy and saw the advantages of HVO and the many applications it can serve, my views on renewable fuels have become a lot more favourable. The benefits of HVO are impressive, and it can assist in reducing CO<sub>2</sub> output for all sectors – from construction to transport – meaning that it can help the industry and consumers on their energy transition journey, easily.

In my more than 15 years working in the renewables sector (20 years in construction) I’ve seen cleaner fuels and heating technologies make some seismic advancements. During my tenure at Nutherm (the distributor for German heat pump manufacturer Waterkotte across the UK and Ireland) for instance, we focused primarily on the design and installation of residential and commercial heat pumps, with the occasional solar and wind installation added into the mix. Now, not only are heat pumps far more efficient, but solar panels are a common sight on roofs around the country and smart technology is making all these systems easier to design, install and operate.

There’s also been a huge leap forward in battery storage capabilities over the last 10 years, allowing for the widespread installation of electric vehicle (EV) chargers in virtually every large town and city. Solar photovoltaic (PV) systems are currently having a real renaissance, proving extremely popular across domestic and commercial projects due to the ongoing rise in electricity costs. This economic context, alongside recent technological developments which have vastly improved the efficiency and longevity of PV installations, means solar systems are now even more attractive from a return-on-investment point of view – especially for large commercial buildings facing big energy bills.

### A meteoric growth in renewables

I like to think that my various director roles at Nutherm and, subsequently, Glen Dimplex Heating and Ventilation have given me a unique insight into the state of the UK renewable energy market, past and present. From working with a wide range of global HVAC equipment manufacturers, distributors, R&D teams, suppliers and end users, I’ve witnessed a marked change in attitudes towards decarbonisation – from a technological curiosity to a vital necessity.

With governments around the world instituting big plans for heat pumps, solar, electric vehicles, low-emission fuels and everything in between in the coming decade, I can only see the meteoric growth we’ve seen in the renewables sector accelerating in the coming years.

### Picking up the pace

As mentioned, interest in solar PV systems, battery power and heat pumps is growing, as businesses and the public become more familiar with renewable technologies. The pace of change is already accelerating, but since the goal of decarbonisation is so imperative, we think progress can – and should – happen even faster.

At Certas Energy, we’re leading the way to a low carbon future through our wide range of renewable energy solutions, underpinned by our commitment to supporting businesses as they navigate their energy transition journey.

### HVO – the promising fuel plugging the net zero gap

Let’s take Certas Energy Hydrotreated Vegetable Oil (HVO) as an example of the impact one smart switch can have on decarbonisation targets. By transitioning from conventional diesel to HVO, businesses can cut greenhouse gas emissions immediately by up to 90%, with no need for capital expenditure or downtime – just drop-in and go. Non-toxic, odourless and readily-biodegradable, HVO is a high-stability, high-performance fuel with a naturally low cold filter plugging point (CFPP) to -30 degrees. It also offers higher filterability and improved combustion over some diesel alternatives. This fuel standard EN 15940-accredited solution is as flexible as it is sustainable, suitable for use in on- and off-road vehicles and plant machinery across a range of industries, including construction, agriculture, transport and logistics, marine and the public sector.

Beyond its benefits for efficiency and performance, what excites us the most about HVO is its potential to help businesses adapt – quickly. I’d argue that most companies across the UK, and further afield, want to reduce their carbon footprints but feel constrained by the current limitations of electric-powered technology and other decarbonisation strategies.

The ‘plug-and-play’ nature of HVO reflects Certas Energy’s wider goal of making carbon reduction not just possible, but simple. We extend this ethos across our portfolio of energy transition solutions and my goal is to make sure that when people think ‘efficient and effective renewable energy systems’ – they think Certas Energy.

### Practicing what you preach

When it comes to decarbonisation, words aren’t enough. To be a real trailblazer in the energy transition space, you must show your dedication through expert guidance and tangible, measurable action. These include the launch of our low carbon, energy transition technology brand Evolo for homes and businesses moving to cleaner energy supply for power and heat, as well as Cynergise™, our commercial energy transition consultancy service.



Our nationwide roll out of HVO for commercial customers and participation in the joint UKIFDA and OFTEC Future Ready Fuels Project, are just some of the other ways we support the adoption of cleaner fuels in the UK. Together, these efforts led Certas Energy to being crowned winner of the highly coveted UKIFDA Green Award for 2023.

In a similar vein, our ESG and Sustainability Committee has introduced a number of energy transition-focused initiatives to underpin our own decarbonisation efforts and set the standard we want to see across the sector. Measures include the adoption of HVO in our own fleets, offering EVs to company car users, the installation of heat pumps in our offices and solar panels on our retail sites. In short, we practice what we preach.

Our drive to lead by example has helped us exceed our 20% carbon reduction by 2025 goal two years early, so we've now set our sights firmly on achieving net zero carbon emissions by 2050. By continuing to set ambitious carbon reduction targets and invest in new and exciting alternative energy technologies, we're confident we can surpass even our own high expectations and support more businesses to start their own journey to net zero.

### **We go – together**

In my decades of experience working on a host of energy transition projects, I've come to believe there's no single silver bullet solution for decarbonisation – and that's a good thing. In the absence of one clear strategy or technology, businesses like Certas Energy have had to innovate, experiment and collaborate. The industry would not have made the incredible progress we've seen over the past few years without adopting a technology-agnostic, open and cooperative approach to emission reduction.

For our part, beyond the constant conversations we have with our customers and colleagues every day, we also display our commitment to dynamic, collaborative thinking through our strategic acquisitions. The most recent example of this is our acquisition of Hafod Renewable Energy,

one of the UK's fastest growing renewable energy businesses.

Hafod offers a wide range of sustainable energy solutions for domestic, commercial and agricultural customers, including air source heat pumps, solar panels, EV chargers and underfloor heating. The addition of Hafod to Certas Energy's expanding portfolio – which also includes Freedom Heat Pumps – demonstrates our dedication to bolstering our renewables offering and providing customers with the right expertise and solutions to make the energy transition with confidence.

### **Decarbonisation – more than renewable technologies**

I would say that a lot of industries are guilty of not acting fast enough to embrace future solutions. I think businesses are fearful of new advancements and technologies, which may then see them miss out on the benefits or not getting the value for money or return on investment that they want.

There truly needs to be a change across the board, and the fuel industry needs to lead in this transition. In all honesty, there will never be a one size fits all solution that can support every business's carbon reduction journey, but there is a huge array of options available to all industries which will save companies money and increase the speed of renewable adoption nationwide.

### **We're all in this together**

Every sector and market needs to assess their specific operations and put in place a realistic plan for reducing their own carbon emissions. That being said, fuel usage is an unavoidably huge factor in most businesses' overall energy transition. The move to HVO, and other alternative energies, will be central to this conversation, as will strategies to reduce waste, shorten journeys, encourage sustainable production practices and make buildings more energy efficient.

We're all in this together, so let's make sure we're harnessing the true power of varying strategies and perspectives – for the good of business and our planet.

# Government strategy, incentives and progress for heat pumps

IN A PREVIOUS ISSUE OF FUEL OIL NEWS (MARCH 2022) WE CONSIDERED THE INCREASING FREQUENCY WITH WHICH CORE FUEL DISTRIBUTION BUSINESSES WITHIN OUR COMMUNITY WERE CHANGING THEIR NAMES AND UPDATING THEIR BRANDS TO REFLECT THEIR BROADER ENERGY REMIT BEYOND, SIMPLY, FUEL DISTRIBUTION. IN MORE RECENT TIMES WE HAVE SEEN THE BROADEST DIVERSIFICATION OF OUR SECTOR YET AS FUEL DISTRIBUTORS EXPAND THEIR PRODUCT AND SERVICE PORTFOLIOS BEYOND THE INCREASINGLY COMMONPLACE ADDITION OF RENEWABLE LIQUID FUELS THROUGH THE ACQUISITION OF COMPANIES IN THE RENEWABLE TECH SECTORS, AS THEY SUPPORT THEIR CUSTOMERS ON THE ROAD TO NET ZERO.

WITH A TECHNOLOGY-AGNOSTIC APPROACH TO DECARBONISATION OF THE DOMESTIC ENERGY SECTOR, WE WILL BE TAKING A CLOSER LOOK RENEWABLE TECHNOLOGY SOLUTIONS TO UNDERSTAND THE ROLE THEY HAVE TO PLAY AND WHAT IS HAMPERING THEIR BROADER UPTAKE.

IN THIS ISSUE WE CONSIDER THE PROGRESS TO DATE ON HEAT PUMPS WITH INSIGHTS FROM **BEAN BEANLAND**, DIRECTOR FOR GROWTH & EXTERNAL AFFAIRS AT THE HEAT PUMP FEDERATION AS HE BRINGS US UP TO DATE ON CURRENT GOVERNMENT POLICY AND SUPPORT AS WELL AS CONSIDERING THE POLICY ENVIRONMENT NEEDED TO DELIVER NET ZERO 2050.

The Heat Pump Federation was launched in 2020 to press government for policy that encourages the electrification of heat. We support all types of heat pump deployment, including heat networks, and systems for commercial process heat and coolth.

As part of our lobbying activity, we invest a great deal of time engaging with community groups across the country, and with built environment industry professionals, so that we can speak to government with authority and with a good understanding of what consumers and the wider industry want to see by way of policy development.

## Measured, managed and affordable

Despite years of effort and some policy interventions, the heat pump market remains stubbornly and disappointingly modest, held back by the lack of a viable long term strategy for decarbonisation of our homes, businesses and for process heat and cooling. Looking to the future, as the Skidmore Report recommended, we need a plan covering multiple Parliaments that sets out how fossil fuels are to be gradually withdrawn in a measured way. As the Net Zero Review concluded, and as the heat pump industry has been saying for many years, this plan needs to sit alongside a concerted and multi-year dialogue with consumers that explains why such actions need to be taken in the face of the risks of climate change. Homeowners are

naturally inclined to resist change unless and until, they see and understand that there are really compelling reasons to participate in a measured, managed and affordable transition to low carbon technologies.

“WE HAVE TO GET TO A PLACE WHERE THE LOWEST CARBON HEAT IS ALSO THE LOWEST COST HEAT.”

The implementation of many of the policy initiatives that are already under discussion and design, such as the Future Homes Standard, the off-gas boiler replacement consultations, the reform of the electricity price setting mechanism and the question of where the burden of the Environmental & Social Levies should fall, will require political courage. It is partly the role of industry to support the civil service policy teams to get to a point when the courage to act can be found.

Whilst recognising the Boiler Upgrade Scheme (BUS) as a welcome further interim step to support heat pump rollout, it has been constrained. We have seen the stumbling blocks caused by the unprecedented rise in electricity prices, a lack of clarity and marketing from the government and the delays in automating

Ofgem processes. There is very sound potential for government to improve the scheme as data from the first year is analysed and lessons are learned. There is now clear evidence that domestic ground source activity has been severely impacted by inadequate levels of support. This is being reviewed inside the Ministry, potentially in parallel with discussions on options for a “rural uplift” that would acknowledge the average higher heat losses and greater land availability in off-gas communities.

In a wider sense, the success of the BUS relies on an environment of supporting policy packages. Grants alone will not be enough to change how the country heats its homes.

2023 could be very different, but it will take genuine political leadership to cause a step change. If the leadership fails, then 2023 could be another wasted year on the road to net zero, and we cannot afford to have more wasted years.

From the consumers’ perspective, the single biggest problem with rolling out low carbon heating is that it remains cheaper to burn fossil fuels, which is completely incompatible with the UK’s legal obligation to deliver Net Zero by 2050. We have to get to a place where the lowest carbon heat is also the lowest cost heat. The impact of such pricing is very clear to see on the island of Jersey, where a 20-hour low carbon tariff sets the electricity price approximately 28% lower than the price of gas. The result, a queue for heat pump deployment that



includes almost every building on the island. Rather less radical, but more far reaching, are recent submissions to the EU parliament by the European Heat Pump Association, calling for pricing policy such that electricity is no more than twice the price of gas across all EU states. Taking technology efficiencies into account, this would render heat pumps around 27% cheaper to run than burning natural gas.

To achieve the scale of utility price differential required for consumers to make the transition, the UK government has to reform how electricity is priced for both domestic and commercial consumers. Work has started! The REMA consultation is reviewing the linkage between electricity pricing and volatile international gas prices, and the proposed autumn consultation on the Environmental & Social levies should resolve the current distribution which sees them make up less than 2% of gas bills, but 23% of electricity bills.

In addition to fair utility pricing, government has a number of other levers that could be pulled as part of the regulatory framework needed to stimulate the transition.

### No time to lose

SAP, the Standard Assessment Procedure, needs significant reform to reflect the low carbon status of heat pumps and the value of their flexibility in a world where the UK generation mix includes a higher proportion of intermittent sources. SAP only impacts on new build; it is RdSAP (Reduced SAP) that applies to existing homes. By convention, RdSAP is usually updated many months after SAP itself. With just twenty seven years to go until 2050, we cannot afford to lose more valuable time

to address the far greater problem that is the existing housing stock. We are, therefore, urging government to progress RdSAP in parallel.

We also need to see permitted development rights (PDR) in planning regulations updated to reflect the need to decarbonise. The Department for Energy Security & Net Zero (DESNZ) is already undertaking this work but we would ask for a greater sense of urgency in driving through the resulting legal changes to allow more homeowners to reduce the carbon footprint of their homes without planning permission.

The final commitments required of government, and that are already on the table, are the introduction of the Future Homes Standard, as scheduled, in 2025; a clear timeline for the end of replacing higher carbon fossil fuel boilers off the gas grid (originally slated for 2026, but this date is almost certain to slip); and the current maximum design flow temperature of 55°C for new heating systems to be extended to all boiler replacements. This latter action would recognise the fact that condensing boilers are, essentially, low flow temperature devices and, it could be argued, should have been stipulated alongside the mandate for the installation of condensing boilers back in 2005. If this had been the case, almost all homes in the land would now be operating at 55°C or less, and it would not have been necessary for Grant Shapps, the Secretary of State, to appear on our televisions, advising home owners to reduce flow temperatures themselves.

### Confident consumers

Outside of potential (or should that be

“essential”) government activity, the industry has to recognise that electrification and Net Zero as a whole, cannot be delivered in spite of consumers, rather it can only be achieved with the full and willing participation of the whole population. This enquires us, government and the heating industry, to do much more to explain why decarbonisation is needed and how it can deliver enormous dividends in terms of economic prosperity and health. Consumers need to have confidence that a decarbonised future will provide affordable, efficient heat. This confidence will come from very clear messaging from government on the direction of travel, ideally reflected across the political spectrum, and from a robust quality management process that can ensure consumer protections with respect to critical heating and hot water services.

MCS, the Microgeneration Certification Scheme, is currently consulting on very significant changes that will place system quality and, by extension, consumer protection, at its heart, tackling the perception that the current scheme is more about paperwork than results.

If consumers are reassured that a heat pump is not scary new technology, having already relied on this technology to keep their milk fresh and their peas frozen for decades, and that they will be protected in the transition away from fossil fuels, then confidence will build. We have all been through massive transformations in our homes before. There was a time when central heating was deemed just for the rich, but now it’s almost impossible to find a house without it. The majority of this was delivered as retrofit and could be the blueprint for decarbonisation.

It is only a confident and informed consumer who will embrace Net Zero, but if the messaging is consistent and the actions taken are fair to all in society, the zero carbon future remains within reach.

**BEAN** is a graduate of Imperial College, an Associate of the Royal College of Science, and a founding member of the Heat Pump Federation (HPF). He has 14-years’ experience in energy and carbon mitigation.

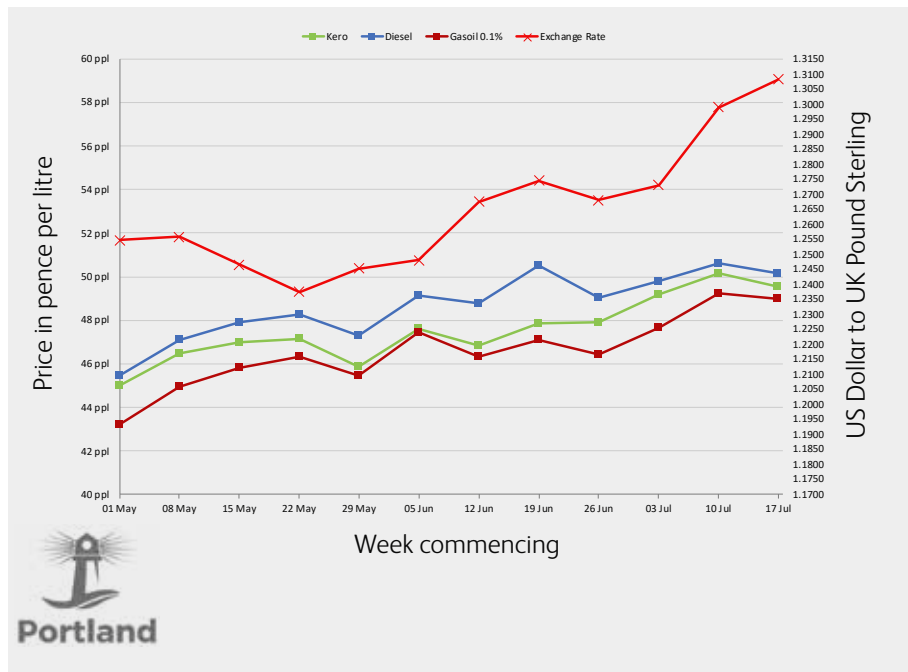


Bean is a highly active participant in the industry, supporting the development of heat pump technology, installer training and standards, and government policy. He is responsible for the lobbying activities of the Heat Pump Federation and for growth in membership.

## Wholesale Price Movements: 19th June 2023 – 18th July 2023

	Kerosene	Diesel	Gasoil 0.1%
Average price	48.85	50.01	47.71
Average daily change	0.57	0.59	0.61
Current duty	0.00	52.95	10.18
Total	48.85	102.96	57.89

All prices in pence per litre



Highest price  
**50.78 ppl**  
Mon 10 Jul 23

Biggest up day  
**+1.76 ppl**  
Wed 21 Jun 23

**Kerosene**

Lowest price  
**46.83 ppl**  
Fri 02 Jun 23

Biggest down day  
**-1.81 ppl**  
Thu 22 Jun 23

Highest price  
**51.62 ppl**  
Mon 10 Jul 23

Biggest up day  
**+1.43 ppl**  
Wed 05 Jul 23

**Diesel**

Lowest price  
**48.49 ppl**  
Thu 29 Jun 23

Biggest down day  
**-1.76 ppl**  
Thu 22 Jun 23

Highest price  
**49.42 ppl**  
Tue 11 Jul 23

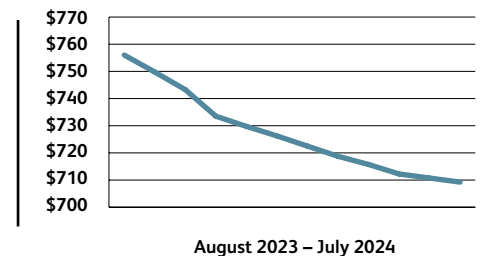
Biggest up day  
**+1.71 ppl**  
Wed 21 Jun 23

**Gasoil 0.1%**

Lowest price  
**45.94 ppl**  
Fri 23 Jun 23

Biggest down day  
**-1.62 ppl**  
Thu 22 Jun 23

Gasoil forward price  
in US\$ per tonne



## The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Scotland	51.49	60.96	106.12	58.70	65.13	110.28
North East	50.44	59.59	105.20	60.47	63.48	108.25
North West	52.01	62.19	107.59	58.94	65.82	110.32
Midlands	50.51	60.12	105.66	57.29	63.95	108.98
South East	50.61	60.08	105.64	64.59	66.76	108.52
South West	50.96	59.92	105.48	59.98	63.74	108.11
Northern Ireland	51.07	61.29	n/a	57.73	65.98	n/a
Republic of Ireland	64.83	66.72	107.06	70.87	70.67	110.45
Portland	48.82	57.64	102.35			

The price totem figures are indicative figures compiled from the Portland base rate using calculated regional variances.

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 €.

Wholesale prices are supplied by Portland Analytics Ltd, dedicated providers of fuel price information from refinery to pump.

For more information and access to prices, visit [www.portlandpricing.co.uk](http://www.portlandpricing.co.uk)

WELCOME TO AUGUST'S EDITION OF OUR SPECIAL MONTHLY FEATURE WHICH GIVES YOU THE OPPORTUNITY TO 'MEET' AN INDUSTRY FIGURE AND, HOPEFULLY, TO DISCOVER ANOTHER SIDE TO THEM BEYOND THE WELL-KNOWN FACTS. THIS MONTH WE CHAT WITH **GEOFF HENDERSON**, WHOLESAL BUSINESS MANAGER AT PHILLIPS 66.

**"WHEN YOU MAKE MISTAKES, MAKE SURE YOU LEARN FROM THEM."**

**GEOFF HENDERSON**

**Please give your career history in 25 words or fewer**

22 years with the company. In this time, I have worked in Supply, Retail, Transport and Unbranded Sales. Promoted to Wholesale Business Manager in 2021.

**Describe yourself in 3 words**

Open. Purposeful. Good-listener.

**What were your childhood / early ambitions?**

I wanted to be a Sainsbury's lorry driver.

**Describe your dream job (if you weren't doing this?)**

Travel journalist (does lottery winner count?).

**What's the best business advice you've ever received?**

Don't put important tasks off until tomorrow and when you make mistakes, make sure you learn from them.

**Share your top tips for business success.**

I like to empower everyone to make their own

decisions and encourage collaboration. I'm also a great believer in constructive, real-time feedback and having clarity around goals and objectives. A clear sense of purpose is also vital in leading a successful team.

**What's your most recent business achievement of note?**

Leading a successful team through a crazy 2022 due to global events. And it's a challenge that remains – finding solutions whilst navigating a customer-focused path through change.

**Tell us your greatest fear**

Snakes – I think it comes from watching Indiana Jones when I was a kid!

**Which is most important – ambition or talent?**

Ambition.

**What's the best thing about your job?**

Working with great people and the buzz from winning new business.

**Which is the quality that you most admire?**

Trust.

**What are you most likely to say?**

Thank you.

**What are you least likely to say?**

Leave me alone, I'm not interested.



**Describe your perfect day**

Summer holiday on the beach or skiing with family and friends. Then socialising in the evening with great company, food and wine.

**Do you have a favourite sports team?**

Aston Villa – very excited about this upcoming season's prospects and being back in Europe.

**What's the biggest challenge of our time?**

Climate change and ensuring technology/AI is used for good.

**Cheese or chocolate?**

Both – but not at the same time.

**Share your greatest personal achievement**

My wonderful family – my wife Liz and our two girls Victoria and Charlotte.

**What's your pet hate or biggest irritant?**

Laziness.

**If you were on 'Mastermind' what would your specialist subject be?**

Cars 1990 onwards.



**If your 20-year-old self saw you now what would they think?**

I would like to think they would be proud of what I have achieved personally and professionally.

**What is number 1 on your bucket list?**

When I was younger it was always to parachute jump and go travelling in Australia. I have been very lucky to have achieved both of these and would now like to share these experiences with my daughters.

**What 3 things would you take to a desert island?**

An endless supply of beer as drinking water is essential for survival... Swiss army knife and magnifying glass to start a fire.

**Tell us something about you that people would be very surprised by**

In May this year I cycled to the Alps with 2 of my mates – We did 500 miles over 5 days.

**Who would you most like to ask these questions of?**

Shakespeare.



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