

Fuel Oil News

MARCH 2022



THE FUTURE FUELS ISSUE

CELEBRATING 90 YEARS OF NORTHERN ENERGY

UPDATED! TOP DISTRIBUTORS IN NI AND ROI

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What's in a name?

Bringing this issue together has served to highlight the increasing number of business updates that relate to the rebranding of those involved throughout our industry.

It seems that the transitioning of a sector leads those within it to consider not just how they evolve their business focus and activities to continue to deliver within the changing sector, but also how they are perceived.

As a famous writer put it: 'A rose by any other name would smell as sweet.' Comparing our energy producing giants and distributor community to a bunch of roses may be an imagination stretch too far, but the implicit meaning certainly applies – that what something is called is arbitrary compared to its intrinsic qualities. In other words, it is the worth of an organisation that counts rather than its name.

As an increasing number of organisations remove references to fossil fuels in their branding to reappear with broader energy-focussed identities, there are the inevitable shouts of 'greenwashing' – the implication that the only thing changing is the name.

A vocal lobbying sector strongly

believes that only 'green' companies hold the answer to climate change and would happily see an immediate cessation of the energy producing activities of those 'belonging to the fossil fuel era'.

Thankfully, the more rational voices understand that the only route to achievement of the Paris goals is the transformation of energy, transport and industry, and that those that are serious about transforming to meet the demand, the necessity, for green energy, are the ones who will get us there.

The oil sector is full of companies pushing ahead with plans to reduce hydrocarbon production and move to low carbon energy and our own website has many articles covering these brand transitions.

All convey the same message: that the change of name is the signal of the shift in the business strategy, ambition, focus and activity and not an end in itself.



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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

The reassuring sight of a Northern Energy tanker out on a delivery, resplendent in the energy distributor's new branding. Find out more about the reason behind this brand overhaul in our 'In Conversation' on pages 13 to 15.



In this issue

There's an update on the tanker market on pages 8 & 9, and thoughts on future fuels for the transport sector in 'Industry Insight' on pages 24 & 25 as well as a detailed analysis of hydrogen and biofuel projects in our analysis on pages 17 to 19.

Delivering more than fuel to the local community

Greater Manchester based distributor, Crown Oil, is proud to be part of the local community, and is passionate about supporting those in the area where the company has its roots.

Matthew Greensmith, managing director said: "Although Crown Oil has grown to become a national leading fuel supplier over the last 75 years, our roots remain in our hometown, Bury. We're proud to be a Greater Manchester business and we are passionate about helping our local community in any way we can.

"Whether it's sponsoring charity events or sports clubs or donating sustainable fuels to help reduce our borough's emissions, it's never been more important to support local."

Having chosen two official charities to support in 2022 – with those chosen being Bury Hospice and Rochdale Children's Moorland Home – Crown Oil has activities planned to support both.

Members of the company will take part in a 'Forget-Me-Not Memory Walk' on Sunday March 20th to raise money to support Bury Hospice patients and their families across Bury. If you would like to For the secondonate then please go here:

<https://www.justgiving.com/team/crownoil>



They also have two events planned to support Rochdale Children's Moorland Home – the first is a climb up Snowdon in September, and they have also sponsored 'Rochdale Over the Edge 2022', a charity bike ride to support both Rochdale Children's Moorland Home and Jolly Josh: <https://rochdaleovertheedge.co.uk/>

Racing, fighting and cheerleading

For the second year running, Crown Oil is supporting 13-year-old Adam (ADS1928) who has autism. Adam is becoming a great racing driver and, to help with the forthcoming racing season, Crown Oil has made a contribution which covers Adam's driving suit and fuel for the year. Adam's dad is the driving force behind the team and works incredibly hard to make his son's dream a reality.

Crown Oil is also sponsoring local Heywood lad, MMA fighter Jamie Hay, who is about to take on his toughest opponent yet – IMMAF World Champion Lee Hammond – on one of the biggest international stages, at Bellator 275.

In addition, Crown Oil has also sponsored Heirforce Cheer, a non-profit cheerleading programme based in Bolton, to help enable those taking part to compete in the Summit Cheer Championship, a prestigious international competition in Florida.

We know that many of our distributor businesses contribute hugely to their local communities as Crown Oil does. We would love to hear from you if you are also proudly sponsoring charities, teams, or individuals this year.

Please contact claudia@andpublishing.co.uk



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New chief executive for leading downstream association

With effect from 13 April 2022, Elizabeth de Jong will become the new chief executive of UKPIA, succeeding Stephen Marcos Jones who has led the association since 2017. Elizabeth will be joining from Logistics UK, where she has been director of policy since 2017.

Responding to the appointment, Elizabeth said: "I am delighted to be joining the UKPIA team, and our growing membership, as its new chief executive. Society at large is going through a historic change with the need to deliver new, sustainable ways of working. UKPIA supports the Paris Goals, and our members are already on the path towards net zero.

"As my predecessor made clear, by working collaboratively with all our members, government, and other sectors, there is a significant and positive role that UKPIA's members can play in delivering the

transformation needed to reach net zero. I look forward to building on the progress already made to encourage a competitive, reliable and ultimately transformed downstream sector."

A changing downstream sector

Stephen Marcos Jones said: "I am confident that Elizabeth will be an excellent leader for UKPIA. The role of the downstream sector is changing and the opportunities and challenges for the sector to be part of the solution to net zero are clear. I look forward to seeing how UKPIA, and the sector, will continue to play a central role in delivering a net zero carbon UK economy."

Darren Cunningham, UKPIA President, general manager of Humber Refinery and Phillips 66 lead executive in the UK said: "We are excited for Elizabeth to join us. UKPIA's members and I look forward to working with her at such a challenging time for



the industry. She brings a wealth of highly relevant experience including working with, and in, government. Elizabeth will lead our collaboration work with policymakers to provide an attractive investment environment. It is vital for us that government offers certainty and the right policy levers if we are to make the energy transition a smooth one."

Oil price at seven-year high amid supply concerns

February saw oil prices reach seven-year highs with geopolitical tensions, a winter storm in the United States and cyber-attacks in Europe all adding to concerns over supply disruptions. With supplies already tight, and crude oil inventories reportedly lower than previously declared, the Ukraine crisis also fuelled supply concerns resulting in both Brent and WTI hitting seven-year highs.

Global crude inventories running low.

In a recent report, Morgan Stanley said it had calculated that observable crude oil inventories globally had shed some 690 million barrels in 2021 leaving them at their lowest level in more than five years and also commented: "With a constructive demand forecast and relatively cautious expectations for Opec+ supply, however, we expect inventories to end 2022 lower still."

The IEA also reported a gap between its global inventory calculations and the actual inventory with various reasons cited but, in essence, it means that there may be a lot less oil in the world at a time when demand is robust and still growing with Covid restrictions being lifted in many countries.

"Tank bottoms are in sight across crude and products worldwide already," said Energy

Aspects. "There is a growing acceptance that the oil market has few, if any, shock absorbers left."

Struggling to increase output

Despite agreement amongst OPEC+ members to continue adding moderate output increases of 400,000 bpd rather than boost additions amid the growing supply worry and higher prices, reports suggest that OPEC+ has already been failing to meet this group quota for months now. The 23-country cartel is struggling with decreasing spare production capacity and Morgan Stanley estimates a potential decline in global spare capacity from the current 6.5 million bpd to just 2 million bpd by the middle of the year.

The IEA also reported that crude oil demand had surprised with higher-than-expected growth during the fourth quarter of 2021 and has revised its full-2022 demand forecast upwards by 200,000 bpd despite anticipating a slowdown in demand growth during Q1 2022.

Competition for product leads to price concerns

Ian Moore from The Oil Market Journal commented: "U.S. refineries have struggled to produce enough distillate over the last year. Outages following the ice storm in Texas during

February 2021 along with the hurricane outages in August and September 2021 resulted in a 2021 Q4 stock build of just 7mb compared to a five-year average of 21mb.

"In addition, shipping demand for distillate is growing as the move to low sulphur fuels in 2020 is now resulting in higher demand after COVID interruptions in 2020 masked the transition. This means shippers are competing for the same product as farmers and industry – low sulphur diesel."

Ian added: "I am deeply worried the ICE Gas Oil future could settle back into the \$850-1000/t. trading range seen during 2010-2014."

OPEC+ seems unphased by inventory updates with its joint technical committee still reporting an expectation of an oil supply surplus for this year, albeit trimming its forecast a little from 1.4 million bpd to 1.3 million bpd. Either OPEC+ is underestimating the global crude oil supply situation, or analysts and observers are overestimating the impact of the decline in global oil inventories and the strength of demand.

At time of going to press the price is hovering around the mid-\$90s. To avoid seeing the price of oil head into the \$100 plus territory the best hope is that it is a combination of both overestimation of demand and underestimation of supply. The reality remains to be seen.



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'The Future is Your NRG' – Oil NRG rebrands to Your NRG

The national bulk and liquid fuel distributor, Oil NRG, has recently announced that it has completed a major rebranding exercise in order to help reposition the business for the future. A released statement communicates the reasons for the rebrand and what it means for the future of the company:

"Oil NRG, incorporated in 2007 and recognised as one of UK's most inspiring firms in a high-profile list from the London Stock Exchange Group (LSEG), has rebranded as Your NRG™ after seeking and listening to the thoughts, opinions and challenges faced by its employees and stakeholders.

Managing director, Jeremy Royle explained: "The feedback that we received provided the business with scope for some exciting projects, although it became clear that the immediate focus had to become the brand positioning.

"This has not only helped to kick start Your NRG's transitional journey from fossil fuels to fuels of the future, but it has also allowed Your NRG to align to the UK Government's pledge to tackle climate change and achieve Net Zero target by 2050. This whilst strengthening and driving the business forward from within."

Sustainability with purpose

The future fuels that Your NRG already delivers, using its growing fleet of road tankers, are cleaner, greener and made from fossil-free, certified sustainable waste materials, reducing their customer's carbon emissions, in some cases



by almost 90% compared to existing fuels.

CEO Roger Peart went on to say: "Just as my family had to transition from coal to oil, so we now move forward towards the greener fuels of the future to help reduce all of our carbon footprints, and Your NRG is our first step to delivering next generation fuels.

"It's early days but it has been heartening to see the engagement and passion for what we are doing here at Your NRG – to build a sustainable service with purpose throughout the supply chain."

Retaining their position as the 6th largest fuel distributor in mainland UK, Your NRG, whose head office is based in Hartlepool in northeast England, remains an independently run liquid fuel supply and distribution business with a growing network of depots. Located on Tyneside, Teesside, Yorkshire, Lincolnshire, Northamptonshire, East and West Midlands, East Anglia and the northern most Home Counties of Bedfordshire, Buckinghamshire and Hertfordshire, Your NRG has ambitious growth plans to continue to expand into new markets.

"The 'Your NRG' rebrand entails a new brand name, logo, vehicle livery, website and products and will also see a complete redevelopment of the company's Hartlepool depot and offices, which is due to be completed this summer."

Fuel Oil News is looking forward to following future developments at Your NRG.

Industry energy expansion reflected in new name for OGUK

OGUK is expanding to encompass the range of low-carbon offshore energy technologies that its members are developing and is reflecting this in a name change.

With offshore wind, hydrogen production, carbon capture and storage systems, and other emerging technologies all in development, OGUK has rebranded to Offshore Energies UK.

Fossil fuels removed from name not focus

Offshore Energies UK will continue to champion the oil and gas sector but will also support those with an interest in ccus, hydrogen production and offshore wind, in a move that reflects the evolving nature of the industry.

Deirdre Michie, CEO of Offshore Energies UK, said the organisation would be a unifying voice for an offshore energy sector that was undergoing rapid and positive change and commented: "Our members are investing in cleaner energies, boosting the technologies needed to support jobs, communities and the UK's energy security – and to drive the transition to low-carbon energy.

"Following an extensive strategic review, we recognised that we too need to evolve to reflect what is happening in our sector.

"This is a natural next step for our organisation, which builds on our heritage of proudly championing the UK's oil and gas industry."

For more details on the rebrand read the full story on our website: www.fueloilnews.co.uk

A lorry looking to the future and a face from the past for Nicholl Fuel Oils

Nicholl Fuel Oils, Northern Ireland's largest independent oil distributor, has recently shared some exciting new developments with Fuel Oil News.

After 17 years away, Rod Hawkins has returned to Nicholl Fuel Oils as the company's new business development manager, and they are thrilled to have him back: "We are delighted to have him back in the team. Rod will be working closely with the commercial and wholesale teams to further expand the Nicholl product portfolio across the province.

"He will also take the lead in introducing our newest fuel grade, HVO, to the market which provides a 'green' alternative to diesel and offers an immediate reduction of CO2 by up to 90%."

Helping Rod to make an immediate impact in this role, Nicholl Fuel Oils has also taken delivery of a new green liveried HVO lorry. The new lorry is certainly a head-turner and stands out from the usual fleet.

Let us know if you see it out and about on the roads!



Rod Hawkins returns to the Nicholl team



Tanker market review

IN A FUEL DISTRIBUTION SECTOR THAT HAS SEEN HIGH DEMAND THROUGHOUT THE CHALLENGES OF THE LAST TWO YEARS, THE TANKER MANUFACTURERS IN THE UK AND IRELAND ARE NO EXCEPTION. WE HEAR HOW THEY HAVE EVOLVED TO ADDRESS THE CHALLENGE OF OVERFLOWING ORDER BOOKS COMBINED WITH UNPREDICTABLE PART SUPPLY IN OUR 2022 MARKET REVIEW.

PLANNING TO MAINTAIN SUCCESS – ROAD TANKERS ARMAGH

“It has been another unbelievably busy year,” reports RTA’s Mark Skelton. “For us, as always, it’s all about ensuring top quality builds and meeting delivery times. Despite all the challenges faced over the last couple of years it seems that the industry need for new tankers knows no limit, which has certainly kept us on our toes, but I am extremely proud to say that, for the whole of 2021, we didn’t let a single customer down on delivery times.”

“With our order books for both 2022 and 2023 already filling rapidly, we are doing what we always do to ensure we maintain our record of delivering to time. We are aware of challenges in the supply chain, with chassis delivery a particular issue which is common across the market, as well as unpredictable problems with supply of some parts. But our premises allow us to keep a good level of stock holding of genuine original manufactured spare parts which has enabled us to increase production, reduce lead times, and more importantly fulfil our customers’ needs.

“When it comes to tanker orders we pre-order everything that is needed to fulfil our commitments, and this is why it pays to get orders in early. The days of ordering a chassis and getting it built in the same year are proving to be more and more difficult and we are already seeing a rapidly filling order book for the year ahead.”

“One of our most recent deliveries was a 20,000 litre, 5 compartment BLVR aluminium, 6-wheel road tanker to Tinney’s Oil. Equipped with a full Emco Wheaton package and built to ADR standard, the tanker is finished in Tinney’s unmistakable red livery.”

The phrase springs to mind ‘If you fail to plan you plan to fail’ and it’s clear that the team at RTA plan everything very carefully to maintain their 100% record of meeting delivery times and surpassing expectations.



Eye-catching red livery for a recent quality build completed by RTA for Tinney’s Oil



Western Fuels’ new build with 13000ltr, 4 compartment, ring tank with Emco Wheaton BLVR system.

EXCEPTIONAL – RTN GROUP

The RTN Group offered a very positive update: “We enjoyed another exceptional year in 2021 with investment in our new websites. The old website was a little outdated and not mobile friendly which is extremely important to our export customers, so a new, modern website has been custom designed with input from our sales team and is now available to view at www.rtnltd.co.uk

“We have also launched a new parts website so customers can now log into www.rtntankerparts.com and order any one of 800 tanker parts from air fittings up to hose reels.”

On the sales side, Adrian Mason, retail sales executive, was pleased to report: “2021 was another very strong year and 2022 has followed suit with orders already into 2023 for rigid. Trailers have some availability for later this year with potential of some stock builds.

“Price fluctuations and availability of raw materials have, again, made pricing extremely difficult, especially when quoting for 2023 builds, but our parts team are working closely with suppliers to keep production flowing without affecting quality.

“We are excited to be exhibiting at this year’s UKIFDA Expo 2022 which marks the return of some sort of normality to the industry so call over and say hello.”

Are you a distributor looking to expand or update your fleet or a tanker manufacturer working to meet demand? Let us know your thoughts on the market: margaret@fueloilnews.co.uk

BEST YEAR TO DATE – COBO TANKERS AND SERVICES

“Cobo Tankers and Services continues to grow in market share and 2021 has proven to be our best year for tanker deliveries to date,” comments Joby Clark. “The semi-trailer market has remained strong. With more people working from home during the pandemic there may have been a slight decrease in fuel used, but this has been made up for by the amount used for home heating and this has been seen with orders of rigid tankers increasing.

“Now having taken our 4th or 5th orders from some customers, these rigid tankers are being well received into the marketplace and not only by customers – we are also thrilled to have won the Fuel Oil News Tanker of the Year 2021.

“With no customer visits happening for the last 2 years we are hoping to be able to start these soon and showcase the factory and to continue to grow our customer base.”



“As Cobo’s customer says: ‘What U want when U want’ – providing you can get a chassis of course!”

MEETING SPECIALIST DEMANDS – VOLVO

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All Volvo FL, FE, FM and FH vehicles are available with a factory-fitted ADR package and can be further supplemented locally with a safe loading pass package to meet these unique UK demands. With additional options including factory-fitted PTO’s and pumps, Volvo can meet specialist requirements across a vast range of applications. Tanker manufacturers can have access to the rollover stability calculation programme to verify the complete vehicle for ADR on the Volvo body builder website.

As all sectors of the industry struggle to employ and retain drivers, Volvo can also offer the market-leading I-Shift gearbox on FE, FM and FH models.

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TOP 10

FUEL OIL DISTRIBUTORS

IRELAND



Republic of Ireland

COMPANY	NUMBER OF TANKERS
East Cork Oil	187
DCC	101
Corrib Oil	110
Valero Marketing	41
Campus Oil	34
M&J Kelleher	21
Glen Fuel Services	20
Sweeney Oil	19
Ultima Oil	15



An RTA built truck in the livery of Campus Oil, a distributor which became a subsidiary of DCC in 2021

Northern Ireland

COMPANY	NUMBER OF TANKERS
LCC Oil4	94
Bangor Fuels	33
Carlisle Fuels	28
Patterson Oil	25
AH Fuel Oils	25
Thompson Fuels	16
Morrow Fuels	16
WR Kennedy & Sons	13
P Ferguson & Sons	11



Fuel Oil News respects the wishes of some fuel oil distributors who chose not to disclose figures

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In Conversation with Northern Energy

Fuelling communities for 90 years

WITH YORKSHIRE-BASED NORTHERN ENERGY CELEBRATING ITS 90TH YEAR IN BUSINESS THIS YEAR, FUEL OIL NEWS MANAGING EDITOR MARGARET MAJOR HAD THE PLEASURE OF MEETING WITH THREE GENERATIONS OF THE ILLINGWORTH FAMILY TO HEAR THE COMPANY'S LATEST DEVELOPMENTS.

In an industry where the most successful businesses are those which constantly evolve to meet the changing needs of the communities they serve, at the same time as retaining the traditional values and unbeatable service on which they built their success, there is no better example than Northern Energy.

Margaret met with managing director Stuart, his father Howard, from whom he took over the reins in 2020 and Stuart's Gran, Muriel Illingworth, mother of Howard and daughter of Ralph Robinson, the founder of the business, at the delightful Sophie's café in the High Street in Hampsthwaite.

Where it all began

It proved to be the ideal setting to begin the journey through 90 years of this fourth-generation family business, with the café sitting on the High Street facing the very building where it all began.

Muriel delights in taking me back in time to the days when "It was milk churns that were sat outside waiting to be delivered," as she looks across the road. Painting a wonderful image of a company that, from the start, has seen an opportunity to fulfil a need and grasped it, Muriel explains how her father, Ralph Robinson, happened across a local farmer who had missed

his train to take his milk churns to sell in the city.

With the farmer accepting Ralph's offer to take his milk to the dairy for him, the business had its beginnings on that day in 1932, with the first flat-bed wagon following shortly after. The milk collection service was extended to farmers throughout North Yorkshire, and the number of trucks grew.

"My father soon realised the waste of bringing back empty trucks," Muriel continues, "so he began to bring back coal from the city to sell to the many local farmers."

From this initial foray into a fuel collection service, the energy business emerged, with

R. Robinson Haulage, as it was then known, expanding its fleet rapidly to service a customer base that quickly reached over 200 customers.

Clearly with an eye for efficiency, Ralph also added a garage at the Hampsthwaite site to fix the trucks, with a car sales business, Rootes Motors, also based there.

Driven by need

Howard takes up the story of the move from milk to oil: “My father, John, joined the business in 1951 and expanded the business further to a network of depots.

“With an increasing demand for agricultural oil, Esso was looking for a partner in the area and approached us, in 1957, to supply to the many local houses and farms.”

As Robinsons Petroleum Distributors (RPD), we became an Esso-authorised distributor, some 65 years ago now, moving to oil distribution in May 1957.”

“It was really a customer-driven change,” Stuart adds. “After more than 20-years’ operating in the Dales, the business had already established a strong network of customers as well as a good base of depots, that made it very easy to move into this new emerging market.

“Once we started distributing oil we added a new business – Robinsons Heating – which undertook domestic installations and enabled further growth in the market.”

This perfect partnership is another example of a company that has, from the start, moved with the times and responded to the needs of its customers.

Fully focused on energy

When Ralph decided it was time to retire, in the mid-70s, the original milk collection business was sold to the Milk Marketing Board and, at that point, the business became fully energy-focused – reflecting this in a name change to ‘RPD Fuels and Lubricants’ in 1979.

With John retiring in 1988, Howard, who came into the business in the late 70s along with his brother David, took over as managing director and relates the “steep learning curve it was” for a young man thrown into the deep end at what turned out to be one of the most challenging times in the business.

“When I was asked to take over the reins of the business, I was still in my 20s,” Howard explains. “My father had a very long-standing relationship with Esso and, having been an authorised distributor for over 30 years, it ran through his veins.

“At the time I was asked to run the business Esso were looking to change the deal. Based on the south coast they didn’t wish to supply so



far north and the new arrangement would have cost us substantially in financial terms.”

Little did Howard anticipate that one of his first major decisions at the helm of the business would be to leave the Esso fold – RPD was the first distributor to do so – but, within the next 5 years all the other ADs had followed.

After a brief supply agreement with Total, the business became an independent supplier in 1992 – a decision it has never looked back from.

Independence brings freedom and growth

“For me the decision to go independent was an easy one,” Howards says. “It gave us the ability to source product wherever we chose and freed us to map out our own future in energy, especially as we could see a growing opportunity in natural gas.”

With a license to supply gas secured, the company evolved to its current identity of Northern Energy Supplies and extended its product portfolio over time to encompass LPG, natural gas and electricity.

Gas and electricity presented Howard with another steep learning curve as it became apparent that: “With the Government driving those markets you quickly realise you have no control, and those parts of our business were swiftly divested.”

Stuart agrees with the importance of self-determination: “Over the past 30 years Northern Energy has grown both in size and in geographical reach. We supply customers from Alnwick to Skegness and everywhere in between but our decisions have always been our own.”

Growth has been both organic and through a few acquisitions in a sector that has consolidated rapidly with many small fuel distributors absorbed into other businesses over the years and others acquired by larger ones.

Family values

“Whatever fuel a customer uses and whatever size they are, our principles are the same – we offer an exemplary service and always look to see where we can add value,” Stuart comments.

Muriel agrees that this has always been part of the business for as long as she remembers: “It was never just about the price,” she says. “It was important to us to provide extra value to our customers.

“My father always went the extra mile and provided more than just fuel to the community – it was about service.”

Stuart picks up the ethos that has been in the business from the start and still runs through everything it does: “Since we began, we’ve stuck to what we know, providing an excellent service that keeps customers coming back.

“Our customers know that we care, and if we mess up, we’ll move mountains to rectify the situation.

“We’re family run and we really care about what we do.”

The fourth generation

In a business that is now in the hands of the fourth generation it is no surprise to hear the emphasis placed on family values.

Succession has always been carefully planned from Ralph to John to Howard through to Stuart – with a wonderful reminder of this heritage in portrait photos of the MDs displayed in the newly refurbished company offices.

Howard’s other two sons, James and Ted, also work in the business, as does Howard’s brother David. With growth continuing rapidly throughout the 2000s, as more and more homeowners chose Northern Energy for oil and LPG and with deregulation in the domestic LPG market making it easier to switch, 2009 saw the company launch a new division, LPG

Home Heat. James was instrumental in building up this new division and is now group sales director, Ted, who joined aged 17, looks after LPG domestic sales whilst Stuart joined in 2013 to run operations before succeeding his father as managing director for Northern Energy in 2020.

With each family member bringing their own experience and skill set to the business they thrive on contributing to the success of a company that offers a greater level of involvement.

“To work towards something that you really care about emotionally as well as professionally is brilliant, not many people have that opportunity,” Stuart acknowledged.

Oil and LPG

When we last caught up with Northern Energy, in 2017, the oil business was twice the size of the LPG business by volume.

Stuart succeeded his father as managing director two years ago and his stated ambition was simple – to double the size of the LPG business over five years to become the largest independent supplier of LPG in the country.

It’s an undeniably ambitious growth target but one which Stuart is committed to hitting which, coupled with the company’s drive to deliver, suggests they has every chance of achieving it.

The trajectory is already looking good, with 2021/22 being the year LPG sales by volume is forecast to match oil for the first time in the company’s history.

The future for fuel

In common with all those operating in the sector both Howard and Stuart feel that the future for energy is far from clear but Northern Energy is committed to both its own contribution to fighting climate change and to supporting its customers in doing the same.

As he takes on the mantle for the next phase of the company’s journey Stuart comments: “I’m proud to be following in my father’s footsteps, leading the way to a more sustainable future.”

In addition to the growth in the LPG business, the last five years have seen two other significant developments at Northern Energy –the introduction of carbon offsetting and an exciting brand facelift.

“There are big changes that need to be made as we step towards meeting the government’s Clean Growth Strategy,” Stuart stresses. “We plan on evolving with the times to offer the bio alternatives to kerosene and LPG when they are readily available and not cost prohibitive to the customer.”



“In the meantime, carbon offsetting is just one way we’re looking to fight climate change and support our customers in doing the same.”

Stuart believes carbon offsetting is part of a wider sustainability strategy and that it is vital that the companies that provide the energy lead the way.

“We’ve partnered with Carbon Footprint, an accredited carbon off-setting business to offer our heating oil and LPG customers the opportunity to offset their carbon emissions from the fuel they buy. The business’ own carbon consumption from activities at head office and fuelling our vehicles is also being offset and, to date, we have offset 50 million litres and planted over 5,000 trees.”

A brand fit for purpose

As the company looks to the future, another exciting project was the development of the new brand that was facilitated by Leeds-based ‘North Project’ and involved all the staff.

Stuart explains the importance of it: “With our aim to double the size of our business it was important that we had a new brand that was ‘fit for purpose’ and that gives us a clear foundation for growth and diversification.”

“The buzz it created in the office was brilliant to see,” Stuart enthused. “The whole team got involved in thinking about what our brand actually stands for, what our values are.”

The offices where the staff are based underwent an impressive makeover in recent years and it is evident, from the smiles, enthusiasm and feedback from the team based there that it has been well-received. Bright, airy surroundings with excellent amenities all add to

the sense of service that runs through the core of the business and graphic representations of the brand values, created in the project work, are interspersed with historic and current company images to create a real sense of what Northern Energy is all about.

A new website was also created with eCommerce capability, video, a ‘Go Greener’ offering and, finally, an interactive values page, and the team are delighted with the end results.

“The feedback from customers has been overwhelmingly positive. I am confident that our new brand and understanding of our brand values is helping us achieve continuing business growth.”

In the café the Illingworths were clearly not just well known but also well liked and highly respected and appreciated members of a close-knit local community.

As Stuart puts it: “Only a tiny percentage of businesses thrive for as long as ours has and our working relationships are stronger than ever. Each family member’s skills are used in the right way.”

“It’s our strong, family values that the business is built on and which will ensure its continued success.”

It was a privilege to hear Muriel’s recollections, not just of the early days of the business but of life in and around Hampsthwaite over her lifetime, and I hope it won’t be another 5 years until I return to hear more.

Meeting three generations of the family, it is clear that the same values and great service that were established by Ralph Robinson in 1932 continue to the present day and are pivotal to Northern Energy’s success – long may that continue!



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Fuelling progress

WHEN IT COMES TO THE FUELS OF THE FUTURE, JUST HOW FAR HAVE WE COME? LIZ BOARDMAN TAKES A LOOK AT THE LATEST HYDROGEN AND BIOFUEL DEVELOPMENTS FOR HEAVY TRANSPORT.

Electric avenue

HGV fleet operators face a huge challenge in rapidly switching to more sustainable fuel sources to meet climate targets. HGVs account for 16% of UK transport emissions, despite representing just 5% of the total mileage covered on the UK's roads.

While electric vehicles may, ultimately, be the answer to decarbonising transport, there are still many practical matters that need addressing. There are issues around battery production, an entire infrastructure to replace and, currently, less than 40% of electricity consumed in the UK is renewable.

There are 278 million cars on Europe's roads and only 0.2% are fully electric. In the UK there are 35 million cars but, as only 0.3% of these are fully electric, the majority of the general fleet is still pumping out emissions... and our 2050 target is looming.

Andrew Willson, CEO of specialist fuel developer, Coryton raises the question: "In our quest towards perfection, are we ignoring solutions that could have an immediate and effective impact on the climate emergency we currently face?"

Biofuels – an immediate impact

"Sustainable liquid fuels could begin making a difference almost immediately, reducing greenhouse gas by up to 80% if fully replacing

their fossil-based equivalent. But even a staged introduction could remove 130 million tonnes of CO₂ in Europe by 2030 – almost the same amount as 33 coal-fired power stations would produce in a year."

Currently up to 10% of the E10 petrol at the pumps is biofuel, but Andrew believes this doesn't go far enough: "Sustainable fuels could be used in all cars which typically run on petrol or diesel. There's no need for any alterations to vehicles or the infrastructure surrounding refuelling. We're limited to the amount of bioethanol we can use in fuels before there's a compatibility issue, but we could use other biowaste to produce other bio-components, with no such issues and with some support to scale up operations. Due to current government policy, there has been no call to produce sustainable fuel in the huge volumes needed – but it could be done, and studies have been undertaken to prove it."

Buying time

"Here we have a solution that could be making a difference to greenhouse gas emissions almost immediately and, given that we're in a climate emergency, why would we not make those easier changes as we transition into fully electric vehicles?"

"It doesn't help when data is misrepresented or 'cherry picked' by influential

NGOs and then used as a base for government policy. It's time we stopped looking at solutions as being either perfect or not worth exploring. While we're gearing up the electric infrastructure, we're still emitting millions of tonnes of CO₂ from our cars every year. Sustainable fuel may not be the ideal solution but, realistically, nothing out there currently is, and it's the only option for tackling the existing fleet. It makes sense that we employ a suite of effective solutions to tackle these issues as quickly as possible. Imposing a single solution policy suppresses innovation that might find better or complementary ones."

Last year, the UK Government changed regulations to increase the amount of ethanol in petrol.

"The impact of this is the equivalent of taking 350 cars off the road every year with no perceptible changes for the majority of consumers," says Stephen Marcos Jones, director-general UKPIA.

"This is a perfect example of a progressive measure to reduce emissions until a greater uptake of electric vehicles or other zero-carbon transport fuels emerge at scale. It reduces emissions today, and it promotes further investment into renewable fuels that will be vital to decarbonising hard-to-abate sectors like HGVs, marine and aviation.

"The Renewable Transport Fuel Obligation is already set to increase biofuel content to 14.6% by 2032. We are keen to work with the DfT to see if that can be increased further as the challenges of electrifying, or even hydrogen-fuelling HGVs and other high duty vehicles, mean that deployment may still be years away from being delivered at scale."

Big names get on board with biofuels

Some of the industry's biggest names have jumped on the biofuels bandwagon, including bp, which clearly sees their potential. The company has acquired a 30% stake in Green Biofuels (GBF), the UK's largest provider of low emission hydrogenated vegetable oil (HVO) fuels.

bp's investment will support GBF's growth as it works with businesses looking to transition away from using traditional diesel fuel in their assets, such as HGVs. It will also expand bp's global biofuels portfolio and its lower carbon solutions for UK customers.

GBF's products are made from renewable feedstocks such as vegetable oils, animal oils and fat. The product range includes HVO Gd+, a low emission, advanced HVO fuel that can be used as a direct drop-in replacement for diesel.

HVOs have enormous potential to play an

important part in supporting lifecycle emission reductions in numerous sectors, providing a commercially viable decarbonisation option for fleet owners, construction companies and vessel operators as a drop-in replacement fuel.

William Tebbit, CEO of GBF, explains: “Our mission is to support the net zero energy transition by providing an immediate solution that makes a difference to carbon and air pollution emissions today. Our fuels provide businesses the time to transition to new technologies when they are proven both economically and operationally.”

And it's not just bp, ExxonMobil recently acquired a 49.95% stake in a Norwegian biofuels producer. Biojet AS plans to develop up to five facilities to produce lower-emissions biofuels and biofuel components by converting forestry and wood-based construction. Commercial production is expected to begin in 2025 and, under the terms of the agreement, ExxonMobil will be able to purchase up to three million barrels of the products per year.

Hydrogen – a net zero hero?

Hydrogen is seen as a very viable solution to the challenge of decarbonising some of the most polluting parts of the economy and will provide real opportunities for zero-emission vehicles, especially in the heavy transport sector. Hydrogen buses, tractors and even a cargo submarine are all being developed and have the potential to play a huge part in the future of net-zero transport.

Leading the charge is the Decarbonised Gas Alliance (DGA), an organisation which represents nearly 30 pioneering businesses that are striving to decarbonise the UK's gas system quickly, safely, and cost-effectively and meet the country's net zero target.

The DGA has come together to explore the role of hydrogen in decarbonising the country's

industry, transport and domestic heating sectors and, last year, as part of a UK-wide roadshow, it completed a 10-stop tour, visiting groundbreaking projects across the country, all from behind the wheel of a vehicle fuelled entirely by hydrogen. The projects included Northern Gas Networks' Hydrogen House innovation site – where the UK's first homes to feature 100% hydrogen gas appliances are sited – Thames Estuary, Equinor's Hydrogen-to-Humber (H2H) Saltend project, Fuel Cell Systems, Johnson Matthey, DNV, and the Shell Learning Zone.

And, in January, we saw the launch of the UK Hydrogen Policy Commission – a new group of senior politicians and policymakers that will hold the Government to account on its hydrogen policy commitments – proof that, as a country, we are taking hydrogen seriously. There are fears that the UK is at risk of missing out on potential hydrogen opportunities and the Commission will consider ways that the Government can maximise levels of private investment.

As well as helping the Government to achieve its ambitions of 'levelling up' and reducing carbon emissions, a hydrogen economy could also protect and create thousands of jobs, as former general secretary of the Labour Party, Lord McNicol indicates: “Embracing hydrogen is critical to achieving the UK's net zero ambitions. From supporting the decarbonisation of energy intensive industries to reducing public transport emissions, there are myriad applications for hydrogen that won't just help us meet our climate goals but will also protect and sustain high skilled jobs.”

On trial

CNG, the largest supplier of low carbon fuels for HGVs, is going to be hosting hydrogen fuel trials this year across its rapidly expanding network of public access biomethane refuelling stations to

support the decarbonisation of HGVs. HyFuels, which is a new branch of the company, has been established to identify the best hydrogen production pathways and infrastructure solutions for HGVs.

Findings from the trials will be used to inform government, industry and customers on the effectiveness of different hydrogen solutions and outline key infrastructure considerations for a hydrogen refuelling network. The company is also planning to incorporate the findings into a wider business strategy, with a complete roadmap for companies to switch fleets from diesel to net zero fuels.

CNG CEO, Philip Fjeld, comments: “HGVs alone account for 5% of all UK emissions, making their decarbonisation one of the single most important things the UK can do to meet our net zero ambitions.

“Renewable biomethane is, and will continue to be, the most effective decarbonisation solution for heavy transport for many years. However, we've launched HyFuels to ensure we're ready to support our customers' journey to a multi-fuel future as new technologies become commercially viable and the fuel readily available.”

Baden Gowrie-Smith, CFO of CNG and head of hydrogen development for HyFuels adds: “We build our sites with our customers' future needs in mind, acquiring additional space so we can expand as demand grows. This means up to 30% of our future land will be perfectly placed to deploy multi-fuel trials on some of the busiest haulage routes in the UK.

“As soon as these technologies are viable, we will be ready to support our customers in adopting the latest and greatest in low carbon technology. With increasingly aspirational decarbonisation targets set by government, our role is to support fleets in their journey to net zero, making it as simple and affordable as possible.”

bp also has a foot in the hydrogen camp. The company is working with Daimler Truck AG to help accelerate the introduction of a hydrogen network. Under their Memorandum of Understanding (MoU) bp will assess the feasibility of designing, constructing, operating and supplying a network of up to 25 hydrogen refuelling stations across the UK by 2030. These stations will be supplied by bp with green hydrogen generated from water using renewable power. Alongside this, Daimler Truck expects to deliver hydrogen-powered fuel cells to customers from 2025.

Emma Delaney, bp's executive vice president for customer and product said:





“Hydrogen is critical to decarbonising hard-to-abate sectors, and for heavy and long-distance freight, it is sometimes the only answer.”

Moving in the Wright direction

In the December issue, we looked at how bus manufacturer, Wrightbus, is leading the way when it comes to hydrogen. Since launching the Streetdeck Hydroliner in 2020, it has prevented one million kilogrammes of carbon dioxide from entering the atmosphere. Emitting just water, and no nasties from its tailpipe, the reduction in emissions from the 600,000 miles covered by its fleet of hydrogen-powered buses, is the equivalent of taking more than 230 cars off the roads for a year.

As well as fleets in Aberdeen, London, Birmingham, Dublin and Belfast, Wrightbus has signed a deal to supply its hydrogen-powered buses to the Go-Ahead Group. As part of the agreement, Brighton and Hove Metrobus has purchased 20 Wrightbus hydrogen fuel cell buses for deployment on the Fastway routes in the Crawley, Redhill and Gatwick Airport areas. The single-decker GB Kite Hydroliner buses will be delivered in June and will be the first hydrogen powered vehicles in Go Ahead’s fleet of more than 6,000 buses.

How aviation can help

To highlight the potential of low carbon hydrogen fuel, Wrightbus’ double decker hydrogen bus took part in a 600-mile tour of the UK last October, which included a stop-off at COP26. The UK Hydrogen Roadshow was a partnership between Wrightbus, hydrogen distribution firm, Ryze Hydrogen and hydrogen production company, INEOS, through its subsidiary, INOVYN. Along the way the bus refuelled at Sutton Tankers’ Gretna depot and zero emission aviation pioneer, Zero Avia’s R&D base in the Cotswolds, showing how aviation technology can support advancements in other areas of transport.

Sergey Kiselev, Zero Avia’s head of Europe, commented: “With passengers connecting to other modes of transport such as buses and trains and high volumes of road freight feeding airport operation, the potential to use hydrogen fuel cell technology to decarbonise these vehicles will be aided by the adoption of hydrogen-electric propulsion and refuelling operations at airports. The refuelling demonstration is an early sign of the potential for airports to act as hubs to support demand for green hydrogen.”

Production potential

And, on the supply side, hydrogen production is ramping up – vital if we are to meet the UK Government’s strategy of achieving 5GW of low carbon hydrogen production capacity by 2030.

“Like low carbon fuels, the downstream sector is already supporting hydrogen and supplies it to forecourts for light-powered vehicles such as the Toyota Mirai,” highlights Stephen Marcos Jones, UKPIA. “Hydrogen is also suitable beyond cars and some of our members are looking at ways to help support the uptake of hydrogen in heavier vehicles. This means working with hydrogen bunkering solutions at ports to refuel hydrogen-powered shipping or delivering to the agriculture sector for their bespoke vehicles.”

Essar recently announced a new joint venture with Progressive Energy to build the UK’s largest hydrogen hub at the Stanlow Manufacturing Complex. Vertex Hydrogen has been formed to provide the catalyst for development of a hydrogen economy across North West England and North Wales, at the heart of the HyNet decarbonisation cluster. It will produce a total of 1GW per year of hydrogen across two units from 2026, providing low carbon energy to replace fossil fuels in industry across the region, as well as heating homes, and fuelling buses, trains and trucks.

INEOS at Grangemouth has also

announced big plans to construct a low carbon hydrogen manufacturing plant. The carbon dioxide from this project will be routed to the Scottish Cluster’s Acorn CO2 transport and storage project, resulting in reductions of more than one million tonnes of carbon dioxide emissions each year.

CEO and chairman, Andrew Gardner, commented: “This is an exciting development and an important step forward for our site. We are determined to reduce our own emissions to net zero by 2045, create products that will help others reduce their emissions, and play a leading role in a clean hydrogen revolution.”

At the end of 2021, Exxon Mobil subsidiary, Esso, signed an MoU with gas distribution group, SGN, to explore the use of hydrogen and carbon capture in the Southampton industrial cluster, home to the Fawley refinery. There’s real potential here for a Southampton Hydrogen hub that could lead to large-scale hydrogen production at Fawley.

The study estimates that carbon capture facilities could initially capture approximately two million tonnes of CO2 per year, including from initial hydrogen production of around 4.3 TWh of hydrogen per year, reducing emissions and stimulating the local economy.

Angus McIntosh, director of Energy Futures, SGN said: “Hydrogen will be key in our journey to net zero, providing a reliable, affordable and practical supply of clean energy to multiple sectors while ensuring security of supply.”

Looking to the South East, Global consulting and engineering company, Wood, has agreed a MoU with HYGEM Energy to accelerate the production of green hydrogen in the UK. The agreement will see Wood bringing together its many years of hydrogen experience, consulting projects and operations expertise to develop solutions for future hydrogen plants, starting with the conceptual design for the facility at Herne Bay in Kent. The facility will generate green hydrogen from existing offshore wind farms from the middle of 2023.

All in the mix

Despite the many challenges that lie ahead, the UK has already taken huge strides towards transport decarbonisation.

As highlighted in ‘Industry Insight’ – pages 24 & 25 – it’s not about finding a single solution but, rather, taking a multi-faceted approach and looking at new, immediate, ways to tackle the problem while we wait for the electrification of transport to be fully adopted. Biofuels may be the answer right now, but hydrogen is the next logical step, and may turn out to be the net zero hero that we’re looking for.

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Could improving gender diversity be an answer to the driver shortage problem?

The fuel oil distribution business is heavily male dominated with very few women driving tankers. When Fuel Oil News caught up with a new distribution business, Bedford Fuels, for our January issue, we discovered that there are already two female tanker drivers in the company. Bedford Fuels, the Bedfordshire-based distributor, only launched in October 2021, and it is already thriving and expanding.

Paul Craddock, the director of the company, said: "In a male dominated industry, it is nice to see female HGV drivers and especially tanker drivers. We have been lucky enough to have two female tanker drivers work for us.

"Most applications for jobs in the fuel distribution industry are from male drivers, but we didn't hesitate to employ our two female drivers, as they are very capable drivers and more than capable of handling the physical aspect of the job.

"Our customers are also delighted when a female driver shows up with their fuel and we have several customers that always ask for our lady drivers to make their deliveries, having lady drivers is a major plus point for our customers when choosing who to buy from. I would hope that more females will join the industry in the



future to help with the driver shortage."

Fuel Oil News spoke with Lorraine, one of the female drivers at Bedford Fuels to hear more about her experience of working in this industry.

Asked what has helped her to settle into what is, traditionally, a very male-dominated industry, Lorraine comments how it has never been an issue noting: "I have always been made to feel welcome by my employers."

That said, Lorraine has seen some of the downside of the lack of gender diversity in the industry, commenting that it can be difficult due to occasional negative comments made by those she interacts with while doing the job. Despite this and the imbalance of numbers, Lorraine really enjoys the job and has also come

across other females doing the same role and even had the pleasure to have personally worked with a couple of other females in the industry.

Asked about any negative reactions to doing the job from friends, those in the industry, or customers, Lorraine laughs: "I was told that I wouldn't last 6 months! (Lorraine has now been a tanker driver for over 13 years!) The customers have always been great and positive towards me."

In fact, asked about what she enjoys most about the job Lorraine doesn't hesitate and her customers are clearly an important part of a good day: "Every day is different, and I enjoy meeting the customers."

Naturally, despite the low numbers in the role, women are more than capable of fulfilling the job requirements and are seen as an asset by some customers. In an industry where there is currently a lack of HGV and tanker drivers, as well as a lack of gender diversity overall, it would be great to see more females entering the industry.

If you'd like to share your own experiences as a female in this industry, we would love to hear from you. Please get in touch with claudia@andpublishing.co.uk

Funded ADR courses available now for HGV drivers to upskill

Do you know any HGV drivers who want to upskill, increase earning potential, or rebuild your confidence to get back behind the wheel? Spaces are available now on funded ADR & Petroleum Passport courses for those wanting to transport hazardous goods and drive fuel tankers.

The Government-funded training courses, called Skills Bootcamps, are now available through the Driver Academy Group, a consortium comprising Logistics UK, HGV training specialist HGVC, and workforce solutions group Manpower.

Vital support for a vital sector

David Jordan, deputy operations director – services at Logistics UK, comments: "HGV driving is a vital occupation that supports all facets of the nation's economy and society; Logistics UK is proud to be part of a consortium helping to

train our nation's supply chain heroes. Providing HGV drivers with an exciting opportunity to upskill and build confidence – at bootcamps located across the UK – and employers the chance to receive funding for this training, this opportunity is not to be missed; we urge all those interested to apply now and secure your place."

Available now – ADR and Petroleum Passport bootcamp

For existing HGV drivers, three types of bootcamps are available: licences upgrades, for those with a category C licence (rigid HGV) looking to upgrade to a category C+E (an articulated lorry), refresher courses for anyone looking to rebuild their confidence behind the wheel, and ADR & Petroleum Passport, for those wanting to transport hazardous goods and drive fuel tankers. While there may be waiting lists



for places on the first two courses, spaces are available now for the ADR & Petroleum Passport.

Free courses are also available for individuals with no experience wishing to start a career in HGV driving.

Companies looking to upskill existing drivers can apply for Government funding of 70% of the scheme's cost. The Skills Bootcamps are part of the Government's Lifetime Skills Guarantee, helping everyone gain skills for life.

For more information, please visit www.hgv.academy



PORTLAND MARKET REPORT

FEBRUARY
IN VIEW

THE TRIUMPH OF REALPOLITIK OVER WISHFUL IDEOLOGIES.

At the end of last year, we predicted a speedy resolution to the issues surrounding the Gazprom (i.e. Russian) owned Nord Stream 2 gas pipeline. As gas prices spiralled out of control, we figured that no European Government would sit on their hands and do nothing to increase gas flows into Europe – even if it meant rewarding Russian gas producers and thus, by definition, Russia itself.

Well, so far, it would seem that we were wrong with our prediction. Nord Stream gas continues to terminate in the Baltic States (this is the Nord Stream 1 part of the line) but goes no further, because the Nord Stream 2 pipe (which continues into Central Europe), despite being ready for operation, has still not been activated. One imagines that, privately, plenty of European leaders would love to give Nord Stream 2 the green light. The resultant increased supply of gas might bring prices down and end the billions of pounds of energy bill subsidisation that is now taking place across the continent. It would also give breathing space to ragged energy departments who are stuck in a crisis whereby energy growth is booming whilst supply is faltering – be that fossil fuel based or renewable.

‘SEEING GREATER VALUE IN A CATASTROPHIC EUROPEAN ENERGY CRISIS’

There are, however, two rather large objects standing in the way of a quick green light for Nord Stream 2. One is the USA who, whilst facing a certain element of domestic turmoil in their own energy markets, are far more energy self-sufficient (when it comes to gas) than Europe. This gives them a certain sang-froid in their dealings with the Nord Stream issue and their opposition to the pipeline is absolute. They believe its opening will give Russia even more (soft and hard) power over Europe and, of course, there is a healthy dose of self-interest thrown into the mix too! Even green-leaning Democrats are well

aware of the economic value of US liquified natural gas exports to Europe, which would be displaced by any new pipeline bringing extra Russian gas into the continent’s heartlands.

The second object standing in the way of Nord Stream 2 is as implacable as the first, but considerably more surprising. It would now seem that Russia is beginning to pull back from the new pipeline, perhaps seeing greater value in a catastrophic European energy crisis, than in the commercial benefit that the line presents. Remember that current gas prices are now so high that Russia is earning more income through existing pipelines than was forecast as a result of the extra volume to be transited via Nord Stream 2. Furthermore, such is Russia’s enviable geographic position, that it has gas options to the East (China) and South (India), which means it can effectively starve (European) markets of gas as it sees fit. With China and India’s boundless gas demand, compared to a Europe of awkward questions, tiresome politics and an obsession with the environment, the options East and South would seem considerably more attractive to Putin’s Russia than moving gas westward via Nord Stream 2.

This makes the current Ukrainian crisis the most serious it has ever been. Conventional wisdom has always been that, for as long as Russia wanted Nord Stream 2 operational, any incursion into the Ukraine would not be forthcoming. But, if it has now been decided in Moscow that Nord Stream 2 isn’t quite as important as it once was, then the outlook looks disconcertingly different. Energy crises have a habit of moving at breakneck speed, but Putin has responded in kind, sensing no better opportunity to take control of the Ukrainian situation whilst Europe prioritises domestic cost of living issues. Arch Machiavellianism for sure, but the Russian leader did cut his teeth in the KGB...

History is made up of missed opportunities and there are many when it comes to European energy policy. One example was when the proposed Trans-Caspian ‘Nabucco’ line was confined to history in 2014 – perhaps the first step in sealing Ukraine’s long-term fate. The proposed pipeline was to source gas from Azerbaijan, Turkmenistan and Iraq (travelling

into Europe via Turkey) and was specifically designed to avoid over-reliance on Russian gas. For a hundred reasons that seemed important at the time (amongst them strong environmental opposition), the line was killed, and Europe continues to rely on Russia for over 50% of its gas supply. Put quite simply, we are at the mercy of energy and state policy as set by the Kremlin, because we have no other viable energy supplies to rely on. Politicians of different persuasions differ on many things, but they almost certainly would all agree that relying so completely on a foreign power for energy supply is not a good thing. Yet, that is the current situation.

‘ENERGY CRISES HAVE A HABIT OF MOVING AT BREAKNECK SPEED’

Which begs the question whether it has been wise to treat gas in the same way as oil and coal when it comes to the decarbonisation agenda? The former has considerably better CO2 credentials and yet has been blocked and opposed in the same way as oil and coal projects. The result has been limited gas supply, rising prices, the slowing of CO2 emission reduction and worst of all, the current state of complete energy insecurity. Those Ukrainians now facing a rather uncertain future, may choose to disagree with the current European viewpoint that ‘climate change threatens lives and livelihoods’. The painful reality is that a lack of cheap and constant energy does exactly the same thing and, had we taken care of our short-term energy needs, – on an equal basis to the long-term – the current Ukrainian crisis could, perhaps, have been avoided.

For more pricing
information,
see page 26

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The Exolum logo is written in a white, lowercase, sans-serif font. The 'x' is stylized with a gap in the middle. The background of the entire advertisement is a vibrant blue sky with scattered white clouds and a bright sun in the upper right corner, creating a lens flare effect. Three seagulls are shown in flight: one large one in the center-left, and two smaller ones, one above and one below it.

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The future transport energy mix



THE ADOPTION OF LOW CARBON FUELS ACROSS DIFFERENT TRANSPORT MODES IN THE PERIOD UP TO 2050 HAS ALWAYS BEEN PART OF THE GOVERNMENT'S TRANSPORT DECARBONISATION PLAN. NOW LOOKING TO CREATE A LONG-TERM LOW CARBON FUELS STRATEGY TO ACHIEVE THIS, THE GOVERNMENT HAS RECENTLY INVITED PROPOSALS, IDEAS AND AREAS TO BE ADDRESSED IN A CALL FOR IDEAS THAT SUMMARISES THE PROGRESS MADE TO DATE AND LOOKS AT SOME OF THE BROAD OPPORTUNITIES AND CHALLENGES FOR LOW CARBON FUELS IN THE TRANSPORT SECTOR. WE NOW TAKE A LOOK AT THE MAIN FUEL OPTIONS THAT ARE UNDER CONSIDERATION.

A range of solutions:

Among other things, the recent COP26 meeting in Glasgow brought in to sharp relief the scale of the challenge to be met in order to achieve the temperature rise containment targets set out in the 2015 Paris Agreement and, in particular, carbon neutrality by 2050.

Central to success in this endeavour will be decarbonisation of the transport sector which, on a global basis, accounts for around a quarter of total GHG emissions. Within this sector, road transport accounts for about three quarters of emissions – roughly split 60/40 passengers/freight, with both aviation and shipping at around 12% and rail at 1-2%. As such, it is the largest single emitting sector and even, in the case of the UK, having overtaken energy supply (now at 21%) in 2016.

It may seem to be a statement of the obvious, but worth re-stating at the outset nonetheless; that, within each sector, there is no one 'silver bullet' but rather a range or 'suite' of solutions that will need to be pursued as part of the de-carbonisation challenge.

With this backdrop in mind we will look at progress to date in road transport, rail, shipping and aviation, highlighting the main options which are available/possible.

Road Transport

The past couple of years has seen a sharp acceleration in the Electrification of this sector in developed economies, with December sales of EVs in the UK accounting for just over 20% of total



new car sales. Significantly greater penetration (50%+) has been witnessed in Norway and Sweden, supported by generous incentivisation. There are two technologies available:

- **Battery power (BEV).** This is now well established as the traction 'technology of choice'. Issues around cost (cf. ICEs) and range anxiety still need to be addressed. However, the received wisdom is that further reductions in battery cost (currently accounting for around one third of total vehicle cost) as well as technology improvements therein will largely eliminate the cost disparity around the middle of the current decade; although sharply rising costs of the key components; lithium, nickel, cobalt and copper, may delay this levelling up of cost.

One of the greatest challenges, the successful resolution of which will go a long way to addressing the range anxiety issue, will be the establishment of a comprehensive charging network. In the UK there were around 25,000 charging stations at the start of 2021 which, by the end of this year, is projected to grow to circa 40,000. The Competition & Markets Authority last year estimated that the network needs to grow to 250,000 by 2030 to meet

expected demand. In addition, there needs to be a material expansion in the availability of ultra rapid chargers, capable of providing an 80% charge in circa 10 minutes.

- **Hydrogen Fuel Cell (FCEV).** This has, in some circles, been viewed as the better long term option, with support expressed, in particular, by both Toyota and Hyundai. But both of these manufacturers now appear to have accepted that BEVs will be the dominant future energy source. The benefits of easier/quicker re-fuelling must be weighed against issues around fuel logistics of storage and delivery, as well as the availability and cost of green hydrogen. Further, there is the same 'chicken & egg' conundrum, as was the case in the early BEV days, around the rate of adoption and development of supply infrastructure. The technology will have a role to play, especially where considerations around battery weight (HGVs), range (HGVs and long distance buses and coaches) and route gradient/engine torque are pertinent.

Two German companies, Bosch and Porsche, have been working on the feasibility of E-Fuels as a future source of transport fuel, offering a drop-in option which would see a future role for the ICE.

In addition, Repsol is planning to establish a synthetic fuels plant near its Petronor refinery, utilising CO2 captured from refinery activity, which would be synthesized with green hydrogen produced in an electrolyser fed with renewably generated electricity.



The longer term viability of these fuels as an energy source for transport is questionable due to considerations around:

- Potential production volumes
- Cost of production
- Extent of energy loss associated with process
- Exhaust pollutants

Biofuels will clearly have an important role to play in the energy transition, especially renewable diesel (HVO), which can be readily produced from existing oil refineries as co-processing or bespoke plants (including conversions of oil refineries).



Rail

The key decarbonisation challenge for rail is the phasing out of diesel-powered trains, which currently account for 29% of the total UK fleet. The Govt. has set 2040 as the date by which this should be achieved. Full electrification of the network must clearly be the long term aim but only 42% is currently electrified (cf. 70%+ in a number of European states such as Spain, Italy and the Netherlands). With this in mind, the Network Rail Decarbonisation Strategy recommends that the non-electrified parts of the network are converted as follows: to electric traction (85%), to hydrogen traction (8%) and to battery traction (5%), calculated by track km, with the least busy routes relying principally on the latter two sources.

Battery powered trains are already tried and tested and are particularly suited to short journeys, and French company, Alstom, has recently introduced a hydrogen-powered service in Germany with no range issues. This suggests that both sources of traction will have a supporting, albeit relatively minor, role to play.

Shipping

While shipping only accounts for about 2.5% of global GHG emissions, the regulatory body, the IMO (International Maritime Organisation), has set targets of a 40% reduction by 2030 and at least 50% by 2050 cf. 2008 levels.

One of the zero carbon possibilities



attracting increasing interest is green ammonia, with a recent Lloyds List survey of shipowners and managers identifying it as one of the three future fuels of greatest potential and noting the expectation for it to account for around 7% in 2030, rising to 30% by 2050.

Similar levels of interest and expected future usage were expressed for hydrogen, with ammonia having the advantage of being able to be stored in liquid form at -34 DegrC vs -253DegrC for hydrogen. Ammonia also has a slightly higher energy density, albeit half that of fuel oil. Its main drawbacks are the emission of nitrous oxides, requiring exhaust cleaning, and its toxicity, requiring careful handling and storage.

Another possibility is methanol, with Maersk recently announcing plans to build its first methanol-powered vessel.

In the nearer term, as transitional options, biodiesel and LNG will have roles to play in decarbonising the sector with a number of LNG powered vessels and a supporting fuelling infrastructure already in place.

Aviation

Aviation also accounts for around 2.5% of global GHG emissions (as of 2019 with the current figure likely closer to 2.1%) and, while modest relative to those from road transport, it is widely viewed as the most difficult sector to decarbonise.

Short-haul journeys with small passenger loads will offer opportunities for either battery power or hydrogen fuel cells (powering electric motors). The biggest challenge presented is long-haul journeys (those over 7 hours duration) which, while comprising less than 10% of total flights, account for 52% of total aviation emissions. Recognising this, some countries have begun to set mandates for sustainable (SAF) content; Spain @2% by 2025 and Sweden @0.8% in 2021, rising to 27% by 2030. The EU has proposed a minimum of 8% SAF by 2030.

Over the past 10-12 years there have been a number of trials, by various airlines, using biojet blends of up to 50% with Jet A-1. At the



end of last year, BA entered into a multi-year agreement, starting this year, with Phillips 66 for the supply of SAF from co-processing at the latter's Humber refinery, which will see the first production of the drop-in material, at scale, in the UK. In Scandinavia, SAS has entered in to an agreement with Preem to replace 100% of its Jet A-1 consumption on domestic routes with SAF by 2030.

Both Preem and Finnish refiner, Neste, are very much in the vanguard of developing SAF production capacity, but global capacity is currently probably no more than around 2-3 million Mt/year. This must be seen in the context of global jetfuel demand of around 270 million Mt in 2021 (down from the 2019 peak of 355 million MT). Clearly, there will be a huge challenge to scale up SAF production, dramatically so, as part of the solution to decarbonise aviation, especially long-haul traffic.

Quantum improvements in jet engine combustion efficiency will also be needed.

To achieve carbon neutrality in transport by 2050 the momentum evident over the past couple of years in the fast rising adoption of BEVs in passenger cars needs to be not just maintained but accelerated and an optimum solution for HGVs must be established. Although the aviation and shipping sectors only account for fairly small shares of global GHG emissions (cf. road transport) there remain a number of daunting challenges to be faced in finding low or zero carbon solutions for their decarbonisation.

The above will constitute a stern test, as well as a significant resource commitment, for the developed economies; for developing economies the test will be of a magnitude many times greater!

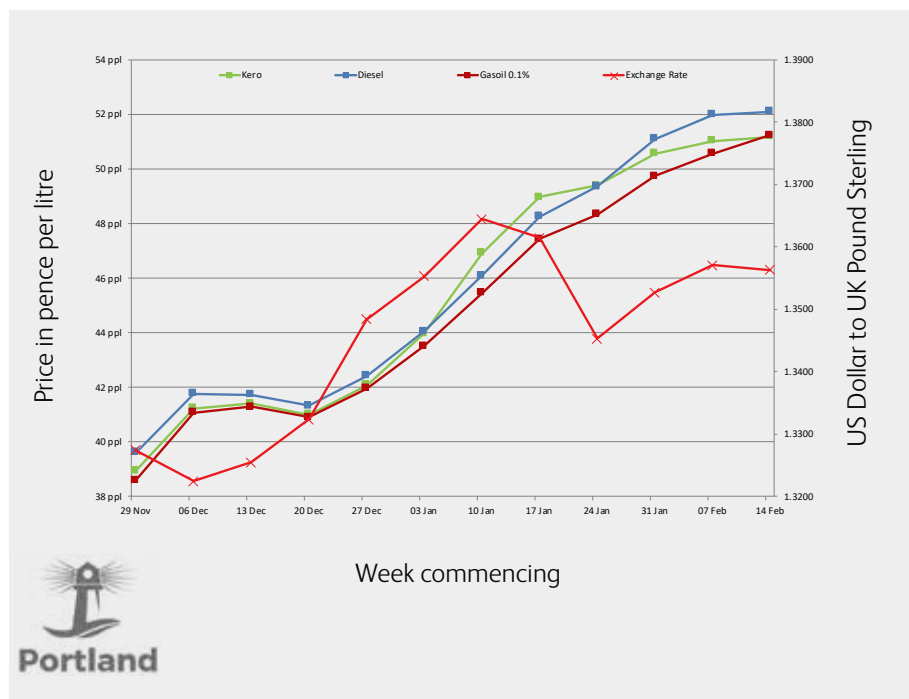
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Wholesale Price Movements: 19th January 2022 – 18th February 2022

	Kerosene	Diesel	Gasoil 0.1%
Average price	50.28	50.67	49.57
Average daily change	0.71	0.78	0.74
Current duty	0.00	57.95	11.14
Total	50.28	108.62	60.71

All prices in pence per litre



Highest price 52.47 ppl Mon 14 Feb 22	Biggest up day +2.07 ppl Fri 04 Feb 22
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Kerosene	
Lowest price 48.19 ppl Mon 24 Jan 22	Biggest down day -2.35 ppl Tue 08 Feb 22

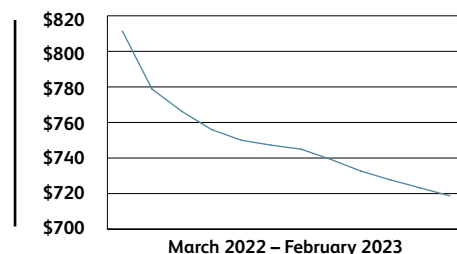
Highest price 53.41 ppl Mon 14 Feb 221	Biggest up day +2.13 ppl Fri 04 Feb 22
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Diesel	
Lowest price 47.81 ppl Mon 24 Jan 22	Biggest down day -2.24 ppl Tue 08 Feb 22

Highest price 52.10 ppl Mon 14 Feb 22	Biggest up day +2.12 ppl Fri 04 Feb 22
--	---

Gasoil 0.1%	
Lowest price 46.69 ppl Mon 24 Jan 22	Biggest down day -2.21 ppl Tue 08 Feb 22

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	53.01	64.04	112.75	60.43	68.42	117.16
North East	51.96	62.67	111.83	62.29	66.76	115.08
North West	53.53	65.27	114.22	60.66	69.08	117.12
Midlands	52.03	63.20	112.29	59.01	67.23	115.81
South East	52.13	63.16	112.27	66.53	70.18	115.33
South West	52.48	63.00	112.11	61.77	67.02	114.90
Northern Ireland	52.59	64.37	n/a	59.45	69.30	n/a
Republic of Ireland	66.35	69.80	113.69	72.53	73.93	117.29
Portland	50.34	60.72	108.98			

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

WELCOME TO MARCH'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.

WITH OUR MARCH ISSUE FOCUSING ON FUTURE FUELS FOR TRANSPORT WE THOUGHT IT WOULD BE THE PERFECT TIME TO CHAT WITH **DAVID WELLS**, THE CHIEF EXECUTIVE OF BUSINESS GROUP LOGISTICS UK, WHO WAS AWARDED AN OBE IN THE RECENT NEW YEAR'S HONOURS LIST FOR HIS SERVICES TO TRANSPORT AND LOGISTICS.



“HAVE A CLEAR STRATEGY, A COHERENT PLAN AND GOOD PEOPLE.”

DAVID WELLS

Give your career history in 25 words or fewer

Engineering graduate, qualified as management accountant in engineering and distribution businesses in UK, EU and USA. Joined Logistics UK in 2009, became CEO in 2015.

Describe yourself in 3 words

Quiet. Determined. Loyal.

What were your childhood / early ambitions?

To be a farmer, driving the recently launched Range Rover.

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

This is it.

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

Never leave any business partner on bad terms.

Share your top tips for business success

Have a clear strategy, a coherent plan and good people.

What's your most recent business achievement of note?

The recovery of Logistics UK's finances following the pandemic.

Tell us your greatest fear

Failure.

Which is most important – ambition or talent?

Talent.

What's the best thing about your job?

Variety.

Which is the quality that you most admire?

Staying calm in a crisis.

What are you most likely to say?

Let's fix it.

What are you least likely to say?

I don't want to know.

Describe your perfect day

Both sons at home, pub lunch with all the family.



David the bee whisperer

Do you have a favourite sports team?

Tottenham Hotspur.

What's the biggest challenge of our time?

Net Zero.

Cheese or chocolate?

Cheese.

Share your greatest personal achievement

An OBE.

What's your pet hate or biggest irritant?

“Your call is important to us” – well answer the phone then!

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

German Shorthaired pointer dogs.

If you were elected to government what would be the first law you'd press for?

Truck driver facilities included in local development plans.

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

Wow – How did that happen?

What is number 1 on your bucket list?

Visit the Grand Canyon.

What 3 things would you take to a desert island?

Gas BBQ, endless supply of books and a tool kit.

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

Eating onion makes me ill.

Who would you most like to ask these questions of?

William Wilberforce.



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