

Fuel Oil News

DECEMBER 2020



THE ISSUE OF CHANGE

THE EVOLUTION OF THE TANKER

KETTLEWELL FUELS – ADAPTING AND THRIVING



**THANKING OUR FRIENDS,
PARTNERS AND CUSTOMERS FOR
YOUR ONGOING BUSINESS IN A
DIFFICULT YEAR FOR ALL.**

**HERE'S TO AS HAPPY A
CHRISTMAS AS POSSIBLE AND
A MORE CONVENTIONAL 2021!**

What can you say about 2020?

We find ourselves in December, the final month of 2020. To say it has been a year of uncertainty would be a masterpiece of understatement. It is a year that has, of course, given us some fantastic, special and memorable moments, both personal and professional, a good number of which we have been privileged to cover within these pages. But it is also a year, with its unwelcome surprises and unprecedented challenges, that, I am confident, a great many will not be sorry to see the back of.

As we approach the end of it, the uncertainty does not show much sign of abating; a sitting US President is holding on by his fingernails, confident he won the election in much the same way West Germany believes it was actually victorious in the World Cup Final of '66, Brexit is yet to be finalised and a trade deal with the EU that "could be sorted out in an afternoon over a cup of coffee" is still the subject of protracted debate – did anyone think to put the kettle on?

Despite the Government's recently announced 10-point green plan, variously described as a 'shopping list' or 'statement of intent', the route to

net zero seems to be more a dimly lit rabbit run than a brightly illuminated path and much of life remains on hold as we muddle our way through 'Lockdown Lite'.

As our thoughts turn to 'ringing out the old and ringing in the new' it is hard not to drift back to the turn of the year, the promise it held and the plans we all likely made for the months that lay ahead, and I find myself recalling Allen Saunders famous 1957 quote; "Life is what happens to us while we are making other plans".

Life is amazing. Then it's awful. Then it's amazing again. And in between it's ordinary and routine. As an industry we have learned to celebrate the amazing, hold on through the awful and regroup during the routine.

So now, as we approach the season of hope, we offer our heartfelt appreciation to all of you who, throughout this year, have overcome every obstacle to keep the UK & Ireland fuelled this year.

We wish you, and yours, a hopeful Christmas and a very healthy and happy 2021 from us all.

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

Janet and Trevor Kettlewell pictured after completing a management buyout to take ownership of Kettlewell Fuels. In a busy year that also saw Janet becoming UKIFDA's 33rd President in June, we catch up on all the changes in our 'In Conversation' on pages 15 to 17.



In this issue

We speak with fleet managers and manufacturers to understand developments in tanker design, functionality and technology as well as the benefits and challenges these present in 'Industry Analysis' on pages 11 to 13, while the changing competitive landscape is considered in 'Industry Insight' on pages 24 & 25.

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Petroineos announces future-proofing Grangemouth reconfiguration plan



Petroineos has announced its proposal to reconfigure the Grangemouth refinery to meet the current, and future, anticipated demand for its fuels products. The reconfiguration will impact on the 637 current full-time roles at Grangemouth but is anticipated to retain 450 highly skilled roles at the site.

The global refining industry is facing huge challenges as increasing electrification of the transport fleet and more fuel-efficient vehicles lead to reduced demand for fuel, a trend that has been accelerated this year by the Covid-19 pandemic.

To address this, Petroineos proposes a realignment of its refining capacity at Grangemouth in line with current, and anticipated future, demand for fuel in Scotland, the North of England and Northern Ireland. The proposal – to keep the two production plants, Crude Distillation Unit 1 and the Fluidised Catalytic Cracker Unit (FCCU) in a mothballed state – will reduce future incurred costs associated with operating these two older plants.

With these changes, Petroineos believes it can have a viable longer-term business, employing up to 450 highly skilled jobs.

Franck Demay CEO Petroineos Refining says;

“As a national critical infrastructure it is vital we retain a productive capacity of fuels in Scotland. For almost a century the Grangemouth refinery has reliably produced high quality fuels for the domestic market and for export. We firmly believe that only by taking action now will we preserve one of Scotland’s last large manufacturing sites and a significant contributor to the Scottish economy.”

Petroineos is entering into a statutory consultation period with its workforce and their representatives to discuss its proposals.

Crown Oil completes acquisition of £18m-turnover Star Oil

North West-based Crown Oil has strengthened its brand in the North West after acquiring an £18m-turnover oil supplier.

The Greater Manchester company, part of the £420m-turnover Crown Oil family of companies, has completed the purchase of Stockport-based Star Oil for an undisclosed sum.

This deal for the 20-year-old business will increase Bury-headquartered Crown Oil’s reach in the region and take staff numbers to more than 1,250.

Star Oil, set up by Christian Hatherall and Michael Doyle, has 7 tankers covering the North West and supplies fuel, oil and lubricants to industrial operations, farms and homes.

Christian and Star’s 10 staff will remain with the business, while Michael will seek new opportunities elsewhere. The business will continue to trade as Star Oil for the time being.

The deal is Crown Oil’s first purchase since 2018, when it added Birlem Oil, in London, and West Midlands-based Beesley Fuels to its portfolio.

The business, established by the Greensmith family more than 70 years ago, had worked with Star Oil for some time when the opportunity arose.

Matthew Greensmith, managing director of Crown Oil Group, said;

“We’re excited to have announced this deal, which will see the Crown Oil family expanding once again. Star has been around for 20 years and, in that time, has built up a



fantastic reputation for great service, which will fit in with Crown’s ideology of putting the customer first.

“We’ve worked closely with Christian and Michael and we were keen to take up this opportunity to safeguard the future of Star, and strengthen our North West footprint. We are looking forward to building on these successes together and we wish Michael all the best for the future.”

Christian Hatherall, who will be senior operations manager for the business, commented;

“I am delighted to see the completion of this deal, which has come about from the solid relationship we have built with Crown over the years.

“I look forward to seeing the business flourish and grow. Being part of that growth journey and working for the Crown Oil Group brand is a very exciting prospect for me.”

The Crown Oil family of companies also offers fuel-related environmental services (fuel testing, fuel polishing, etc.) and has interests in utilities connections, gas supply and uPVC building products.

Fuelsoft team members receive recognition

Fuelsoft’s operations director Neil Smith and technical director Glyn Highfield, have received certificates in Company Direction from The Institute of Directors (IoD).

Commenting on the receipt of his certificate, Neil said;



“I am over the moon to have received my certificate in Company Direction with distinction. I think it is always important to keep learning and expanding your knowledge

and experience in all sorts of areas, as it can bring benefits to me personally and to Fuelsoft. The rest of the board were 100% behind both myself and Glyn taking this qualification.”

When asked about the course, which covered strategy, leadership, finance and the role of the director, Neil added;

“Not only was the course very enlightening, but it also provided me with the opportunity to meet some fantastic business leaders and lecturers.”

BP leads the way on decarbonisation projects

BP has announced a partnership with fellow oil and gas majors ENI, Equinor, National Grid, Total and Shell for a new initiative, the Northern Endurance Partnership (NEP), to develop offshore carbon dioxide transport and storage infrastructure in the North Sea.

BP will lead and operate the carbon capture, utilisation and storage initiative which will serve the Net Zero Teeside (NZT) and Zero Carbon Humber (ZCH) projects. These two projects are set to become the world's first net zero industrial clusters, with the hope that their successful at-scale launch will kick-start decarbonisation of industry and power in Teeside and Humberside, two towns which have historically depended upon energy-intensive industries for economic livelihood.

The projects aim to be up and running by 2026, with realistic pathways to achieve net zero emissions as early as 2030 through a combination of carbon capture, hydrogen and fuel-switching technologies. If successful, NEP's contribution to NZT and ZCH will enable the decarbonisation of nearly half of the UK's industrial emissions.

Grete Tveit, senior vice president for low carbon solutions at Equinor, said;

"Carbon capture and storage is a crucial technology for reaching the goals of the Paris Agreement and we are committed to working with others to create real change. We believe that, with our partners in the Humber, Teesside and the Northern Endurance Partnership, we can deliver deep decarbonisation of these major UK industrial clusters using CCUS and hydrogen, safeguarding jobs and helping develop world-leading low carbon expertise that can play a leading role in the UK's journey to net zero by 2050."



UKPIA proposes net zero pathway in ground-breaking report

Meeting net zero in the downstream oil sector, and in society at large, has been described by UKPIA as "one of the greatest challenges we face".

The association's ground-breaking report, titled "Transition, Transformation, and Innovation: Our role in the Net-Zero Challenge", looks at credible scenarios and proposes an illustrative pathway for the UK downstream sector to achieve government mandated net zero targets, with practical policy solutions to help overcome this challenge.

The three key findings are:

Low carbon liquid fuels

Can play a key role in the UK's decarbonisation – and are doing so already.

There are a number of technological pathways for the downstream oil sector to deliver further decarbonisation of products and their manufacture. Biofuel content in existing road fuels already reduces vehicle carbon emissions and, with further investment in development of clean fuels, net zero could be achieved more readily because they mainly use existing vehicles and infrastructure.

Hydrogen

A major opportunity for both industrial and transport decarbonisation. The downstream oil sector is the largest industrial producer and user of hydrogen, as part of the reforming process and as a power source in refineries, and can maintain and grow its role in producing and delivering zero-carbon emitting hydrogen. Hydrogen has the potential for many roles in decarbonisation especially in some sectors, like

heavy industry, that may struggle to deliver electricity-only solutions.

A systems-based approach is needed

Society is more interconnected than ever before, so delivering net zero will be difficult without considering those interdependencies. An enabling policy framework is required to produce low carbon - and eventually net zero - liquid fuels. Bespoke approaches will be necessary in sectors with limited decarbonisation options like aviation.

Following publication of the report, UKPIA director-general, Stephen Marcos Jones said;

"This is an exciting yet challenging period of evolution for the downstream oil sector – we are committed to action on climate change – and this report shows that, within the right policy framework, this sector can transform and deliver Net-Zero.

"We see hydrogen as a critical component of meeting Net-Zero – and while this is only now coming on many people's radar, it is an area where the sector is the largest producer of hydrogen in the UK and can use that experience to maintain and grow its role in the emerging hydrogen economy.

"Only with industry and government working hand-in-hand in a systems-based approach will the task of Net-Zero be achieved in the UK – as such, this report urges ongoing and rigorous dialogue to ensure optimal results. We want to work now across government to make this report a reality."

We will be taking a more in-depth look at the UKPIA report in the January issue of Fuel Oil News.

Top points for gender diversity

In a historically male-dominated industry, we are delighted to be featuring some very successful women in this issue of Fuel Oil News. We are equally pleased to see that gender diversity in this sector is on the rise.

A recent review of FTSE 100 companies by Debut has found that oil and gas producers are ranked 2nd in the top five most diverse FTSE 100 sectors in the UK.

The review also found improvements in terms of gender diversity generally on the boards of the FTSE 100 companies, with woman taking 36% of current board

roles. Although this hits the diversity target recommended by the Government five years ago, it is still a way away from a 50/50 split, which is achieved by just nine of the 100 companies.

Royal Dutch Shell is one of the nine companies with a 50/50 split, and the oil and gas sector as a whole is close to the target, with 54% male board members and 46% female board members.

We'd love to hear about your own gender and diversity policy. Contact: stephanie@fueloilnews.co.uk.

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Mabanaft's standards remain high through challenging times

With a network of independent fuel terminals strategically located across the country, Mabanaft is uniquely positioned to supply fuel to the UK market. The company takes pride in listening to its customers and delivering the best possible service. To ensure standards remain high, Mabanaft undertakes a customer survey each year and has just released the results of its 2020 survey which offer great insight into what customers expect of a supplier.

Top priorities

In this year's survey, customers confirmed that their priorities remain the same when choosing a fuel supplier – identifying customer service, reliable continuity of supply, the accuracy of invoicing and price as key drivers.

Customer service

97.5% of customers rated the service received as excellent or good, with comments including "always happy on the phone and extremely fast at placing orders" and "very efficient, professional, always helpful and courteous". Positive feedback on the way Mabanaft's staff have performed is especially commendable given the hugely difficult circumstances created by Covid-19. While working from home has presented new challenges, Mabanaft continues to explore ways of supporting staff and enhancing internal communications so they can provide answers quickly.

Reliability of supply

While always significant to customers, reliability of supply has been of paramount importance throughout the uncertainty of 2020. Increasing 1.1% from last year, 95% of those surveyed rated Mabanaft's supply reliability as excellent or good. Demand for home heating oil surged as people remained in their homes, so Mabanaft is delighted to have been able to keep pace with that demand and keep its customers fuelled.

Accuracy of invoicing

Mabanaft understands that accuracy of invoicing is crucial for customers, as errors create a huge administration challenge. This year, 92.5% of customers rated invoice accuracy as excellent or good. The Mabalive portal allows customers to proactively manage deal administration throughout the deal lifecycle, meaning errors can be identified and quickly



resolved. The survey indicates there is still room for improvement; further investments in straight-line processing will help eradicate mistakes.

Price

Mabanaft prides itself on providing quality fuel at competitive prices, even in a fluctuating market. According to survey respondents, 97.5% believe that Mabanaft is performing well on pricing and that "prices in the past year have been very competitive". The Mabalive pricing portal has proven to be invaluable during the lockdown, offering live prices online between 8am and 5.30pm. In response to customers' feedback, further enhancements such as online bidding will be released shortly.

Mabalive

Customers also praised Mabanaft's online system Mabalive, saying one of the main benefits is the "ability to view current prices live" as well as offering "a very straightforward process and usefulness in tracking outstanding balances". They also rated online reporting and deal administration highly for ease of use.

Steadfast in difficult times

Martin Cook, managing director at Mabanaft, says of this year's survey results;

"Despite the challenging circumstances of 2020, Mabanaft is delighted to have delivered a reliable supply of fuel and provided what our customers deem to be an excellent service throughout. We have received brilliant feedback that will allow us to improve even further in the coming year. We also noted several helpful suggestions for ways to improve certain aspects of our service. Online bidding will offer a new and exciting dynamic to the process of purchasing fuel online. We will also bear in mind requests for Mabanaft to have a presence in additional locations.

"We'd like to thank everyone who took part in our 2020 survey and look forward to working with you all over the coming years."

Essar safety raises £3,000 for hospice

Employees at Essar Stanlow have been able to make a valuable difference to a cause close to their hearts, thanks to the company's 'Let's Give' programme.

The initiative links safety achievements with charitable giving to local charities, nominated by employees. A £3,000 donation to The Hospice of the Good Shepherd came after Essar recently recorded two million working hours without a Lost Time Injury.

For over thirty years, the Hospice in Backford has delivered end of life care to patients living with life limiting conditions. In the last year, almost 1,000 families have benefited from the combined services of both the Hospice and the bereavement team.

Paul Wilcox, inspection team leader, who also nominated the charity, added;

"Many colleagues at the refinery, and their families, have benefited from the care and support the Hospice offers and it is great that we are able to collectively thank them, especially during these difficult times, for the incredible work and services provided to so many local families."

The Hospice is facing an unprecedented financial crisis due to the impact of the pandemic. Not part of the NHS, the Hospice receives only 25% of its income from government funding, meaning it has to raise just over £3 million each year with fundraising efforts severely hampered this year.

Justin Caroe, community & events manager for the Hospice, commented;

"We are delighted to receive this generous donation from Essar, which will make a huge difference in allowing the Hospice to continue providing vital services to the community. We continue to source and raise funds on a daily basis to allow our Hospice to remain open, and whether its company or individual funding every penny is a step closer to a more sustainable future for us."





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A member of the Prax Group

OGUK believes diversity and inclusion key to industry future

OGUK has launched a first-of-its-kind survey that will deliver a baseline for diversity and inclusion (D&I) demographic and sentiment within the sector, and act as an essential catalyst for progress and change.

As the energy mix becomes increasingly integrated, differences of perspective and background will be the key to harnessing the new ideas, disruptive innovations, and future ways of working that will propel us forward. The feedback provided by survey participants will play a pivotal role in promoting D&I, which will be a critical success factor in the industry's journey towards realising Roadmap 2035.

Craig Shanaghey, president, operations services (Europe & Africa) at Wood, and D&I task group chair, said:

"The challenges we are facing as an industry require us to collectively think, behave, and act differently. At this critical juncture, we will only be able to turn those challenges into opportunities by unlocking the full potential of our talent pool; by creating the space for diversity of thought and perspective that are essential as we race to keep pace with the fast-changing world around us.

"As a task group, we recognise the broad

acknowledgement that a move to better D&I means a better employee experience, it means a better culture, and it means better business. But the challenge is about how we drive that change – it is a complex and ever-evolving journey that requires constant focus and effort."

OGUK chief executive Deirdre Michie said; "I am delighted to announce the launch of our industry-wide survey on diversity and inclusion. D&I is critical to our efforts in delivering Roadmap 2035 – by fostering a diverse and inclusive working culture, we will secure and retain new talent, bring new perspectives and ideas to the fore and, ultimately, expand supply chain opportunities whilst continuing to contribute to the UK's vital security of energy supply."

The anonymised and confidential survey, developed by OGUK's Diversity and Inclusion Task Group with Robert Gordon University (RGU), will remain open until Thursday 31 December.

It is accessible to all individuals within the oil and gas industry, including those who may recently have retired, or are currently off work or between jobs but are able to share input from their experience at previous organisations

Results and insights are expected Q1 2021.



Logistics UK announces award winners

Twelve of the UK's finest logistics businesses are celebrating after being recognised at Logistics UK's 2020 Logistics Awards, sponsored by Port of Dover.

David Wells, chief executive Logistics UK; "These awards have been the ideal opportunity to recognise the outstanding work of the individuals and businesses committed to keeping Britain trading under increasingly challenging circumstances. I would like to congratulate the winners personally; this recognition is so richly deserved."

The awards were presented at Logistics UK's virtual Future Logistics Conference & Expo on 13 November 2020 and a full list of the winners for the 2020 Logistics Awards can be viewed at:

www.logistics.org.uk/logistics20

CLH completes the purchase of Inter Terminals storage sites to become Europe's leading bulk liquid logistics company

CLH has completed the purchase of Inter Terminals' liquid product storage facilities in the United Kingdom, Ireland, Germany and the Netherlands from Inter Pipeline Ltd. Through this transaction, CLH are adding a further 15 liquid product storage terminals to its current network, making the company the leader in Europe with operations in 8 countries.

The chairman of CLH Group, Jose Luis Lopez de Silanes, stated;

"This acquisition represents a unique opportunity to continue the company's international expansion and consolidate its presence in the European market".

CLH's Group chief executive officer, Jorge Lanza, added;

"This transaction will expand CLH's knowledge of chemical products and biofuel storage by gaining the experience of a European leader in these business segments. It is also in line with CLH's strategy of diversification beyond hydrocarbons in response to the challenges of climate change."

"CLH is acquiring a high-quality business with an outstanding team who have made an important contribution to the success and growth of Inter Pipeline over the past 15 years," stated Christian Bayle, president and chief executive officer of Inter Pipeline.

The 11 UK terminals included in the agreement have a capacity of more than 2 million cubic metres and can store a wide range of liquid products related to a number of supply

chains including diverse chemical products, as well as traditional fuels and biofuels. Integrating these terminal facilities in the United Kingdom offer an excellent complement to CLH-PS, the CLH Group subsidiary already operating in the country.

In addition, the agreement also includes one terminal in Ireland, where CLH already operates at the Dublin airport through its subsidiary CLH Aviation Ireland, plus two more in Germany and one in the Netherlands.

The ITL businesses in scope of the agreement currently have a workforce of 530 highly experienced and technically qualified employees and CLH is committed to ensure facilities continue to be operated under the highest levels of safety and quality conditions.

Industry charity struggles to support record demand

Ben, the charity dedicated to supporting the people of the automotive industry, is making an urgent ‘rallying cry’ in a letter to industry leaders as it faces a 50% increase in demand for services against a £1m income shortfall, following the cancellation of fundraising events including Ben Ball. Without additional funding, Ben may be forced to make difficult decisions about which cases to support.

Covid-19 is having an unprecedented impact on the health and wellbeing of the automotive workforce. More and more people are turning to Ben in financial hardship or are struggling to cope with mental health issues and other life challenges including bereavement.

In the open letter, Ben is asking companies to pledge to do three things:

1. Be an advocate for Ben, ensuring the message of support is promoted widely within their business so everyone knows they are never alone
2. Encourage colleagues to support Ben through

Payroll Giving, Ben’s Big Weekly Lottery and its fundraising products and events

3. Dig even deeper as a business to help address the £1m shortfall.

Matt Wigginton, fundraising director at Ben, said;

“This is an urgent situation that we’re facing – our support teams are at breaking point, with more cases than ever before and we don’t see that changing. The issues people are facing are more complex and more urgent than we have ever seen before. If we’re unable to fill this funding shortfall then we may not be able to support everyone who turns to us for help. That could have a life-changing impact on someone in your business.

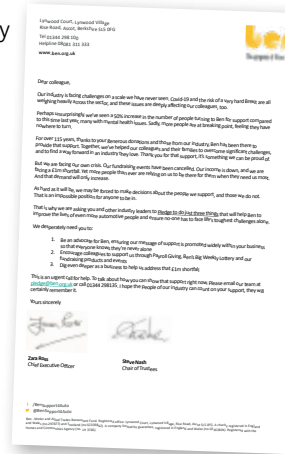
“The automotive industry is like a family; we have to look after each other. People will remember what the leaders of our industry do in a time of crisis and I urge everyone

to consider how you can help ensure Ben is there for everyone, no matter what.

“Amazingly, we have already received pledges for donations of more than £65,000 on the first day of this campaign. Every donation makes a huge difference to people’s lives and we’ll be celebrating each and every one publicly over the coming weeks. Thank you to those who have already pledged their support.”

If you wish to support you can email via pledge@ben.org.uk or call 01344 298135.

The letter from Ben’s chief executive, Zara Ross, and chair of the board, Steve Nash, outlines how the industry can help ensure no-one faces life’s challenges alone. It is also being sent directly to industry leaders as an urgent plea for support, and can be read in full on the Fuel Oil News website www.fueloilnews.co.uk



UKPIA response to end of combustion engine vehicles

In its aims to decarbonise transport the UK Government has announced plans for an end to sales of new conventional combustion engines from 2030. UKPIA fully supports the decarbonisation of transport and will continue to work with its members to deliver that aim but believes that, as well as encouraging EV uptake in light vehicles, government should support the uptake of a range of technologies to reduce carbon emissions in light transport without a ban, but welcomes the acceptance that hybrids have an important role to play.

Stephen Marcos Jones, UKPIA director general, commented;

“The downstream oil sector recognises the need for action on climate change and will play an active role in the pathway to net-zero emissions.

“UKPIA and our members know that a



range of technologies, including EVs, have a major role to play into the 2030s and beyond, and we will keep working with government to deliver this ambitious new target.”

To be ready for the end of the sale of new conventional combustion engines from 2030, UKPIA believes that a holistic plan coupled with regulatory certainty is needed from the UK Government to enable the sector to meet this challenge.

Stephen explained;

“We also need to work with government to make sure that low carbon liquid fuels (LCLFs) continue to be developed. Harder to decarbonise sectors, like aviation, will rely on LCLFs, meaning we need to develop them now

to ensure they are decarbonised for 2050.”

UKPIA will continue to work with government on creating a clear plan that ensures greenhouse gas emissions are reduced across all technologies in the most economically efficient way – taking a whole system-based approach with tailored policy interventions for difficult to decarbonise sectors such as aviation.

Stephen concludes;

“While internal combustion engines will still be in use for some time to come, it is important to deploy low carbon liquid fuels, like biofuels, into the fuel mix sooner as they offer significant carbon emissions reductions with today’s car fleet.”



Evolution of the tanker

IN RECENT ISSUES OF FUEL OIL NEWS, WE'VE EXPLORED THE VARIOUS CHANGES AND CHALLENGES FACING TANKER FLEETS, FROM INCREASING AUTOMATION TO ALTERNATIVE FUELS AND ELECTRIFICATION. HERE, WE SPEAK FURTHER WITH FLEET MANAGERS AND MANUFACTURERS TO SEE WHAT THE KEY CHANGES HAVE BEEN, WHAT IS YET TO COME, AND WHETHER THIS WILL BRING BENEFITS OR CHALLENGES ANEW.

Design developments

Joby Clark, sales and project engineer, and Fernando Gomis, technical director, Cobo Tankers and Services Ltd, comment on how tankers have changed over time;

“The designs of tankers have evolved over the years. Many years ago, in the traditional tanker, we used to see a full chassis arrangement under the whole tanker, but then operators started focusing on weight. Going back to around 2005, we were able to build a standard spec non-pumped trailer under 5 tonnes. This perhaps pushed the compromise between the longevity of the tankers and the weight to the limits and thankfully operators now accept a better engineered product in return for a slightly lower payload. Our standard non-pumped semi-trailer now comes in at about 5.3 tonnes, and a 19,000 litre rigid tanker with full metering and hose reel comes in at about 2.55 tonnes plus base vehicle tare weight.”

Speaking about the recent design changes to Cobo tankers, Joby continued;

“In the last 8 years the Cobo tanker has had the biggest modification to design yet, there has been the introduction of our patented SKD chassis and also the modification of the shape of the semi-trailer tanker to include a 6-metre-long rear section. Both these developments have been long-tested in the field and are now widely accepted.

“The 6-metre-long rear section was developed to remove a circumferential weld of the tanker. This not only reduces the time it takes to build the tanker, thus ensuring a competitive price, but also removes the requirement for five welded T joints in the aluminium plate and therefore increases the structural integrity of the tanker as a whole. This benefit is passed onto the rigid barrels with tankers up to 22,000 litres now being manufactured out of a single “tube” arrangement, using 3 sheets of aluminium with no circumferential weld giving a more streamlined look to the tanker.”

Hoyer Group’s head of fleet, Peter Ellison, comments on how, whilst much of the overall construction of tankers has largely stayed the



same in recent years, there have been many ‘cosmetic’ changes in order to benefit drivers;

“Recent developments have been very limited over the past few years other than trying to establish the optimum configuration given tare weight, wheelbase and payload. More development work seems to have been done around cosmetic changes to aerodynamics, hose trays and toolboxes in addition to providing the driver with the best technical solutions to prevent “crossovers”.

“The product grade indicators now have the functionality to mount the visiwink and foot control valve in one combined unit which greatly assists the driver when following his loading and unloading procedures. More



recently we have seen the introduction of the new RTN short wheelbase (SWB) Maxivator trailer. This is a 40,200 litre, 6 compartment, 3 axle LGBF specification trailer for the purpose of transporting petroleum products with UN classification Numbers 1863, 1202, 1203, 1223, 1170, 3475, 1268. The most significant change being the shape of the barrel which moves from an elliptical shape to the new max section type barrel. This specification enables Hoyer to replace some tandem axle trailers without significantly impacting on the manoeuvrability a tandem trailer brings, this at the same time as increasing payload.”

Discussing a potential reason why overall construction may not have changed much in recent years, Peter comments on the increasingly stringent certification process;

“Tanker production construction and design does not change too much. What has happened is that the tank Type Approval (IAC or ECWVTA) certification process has become much more stringent through the VCA. There are predominantly two forms of construction “Banded” tank design and “Stuffed Head” tank design. The banded design is where each of the

compartments are manufactured separately and then welded together with a band to form a barrel, the “stuffed head” design is similar to a tube with plates (baffles) inserted inside and then welded. The Banded tank was seen to be quite inventive, it is stronger, avoids intercompartment leaks, is stronger in design and is easier to repair following damage.”

Beneficial developments

Ian Billington, operations manager at WCF Fuels North West, describes the biggest changes and benefits to his fleet;

“Since joining WCF Fuels North West we started out with 5 tankers - 4 based at Carnforth and 1 at Preston. We now have 4 at Preston and 8 at Carnforth. We are continuing to grow to this day. The WCF Fuels business combined has 80 tankers, very few aged 8 years or over, 65 drivers and 13 depots.

“The biggest change so far is the pneumatic and air-control elements within the tankers which have improved over the years and, as a result, the reliability of the air systems on tankers is much better.”

Mark Scott, UK fleet engineer, Suttons Tankers, also comments on beneficial changes to tank capacities;

“In terms of the most recent developments and features of tankers, I’d say that some of the biggest changes were in the late 1990s and early 2000s following the increase to 44 tonne operation, which led to increased tank capacities. The drive has since been to reduce overall weight which has introduced other challenges.

“The biggest development, in my opinion, is the introduction of the Tridem system which produces a more manoeuvrable asset through the three-axle bogie. It also reduces turning circle, fuel consumption and tyre wear, improving the efficiency of the vehicle. The Tridem system is something we will be implementing on the Yorkshire Water fleet.”

Increased safety

Highlighting what he regards as the most beneficial change, Ian Billington comments on the increased safety of more modern tankers;

“When people spot a fuel delivery truck, their first thought is to not get too close. Fuel transport can be dangerous, but it’s a lot safer than it was in the beginning. From tin cans on the bed of a wagon to the sleek lines of the modern delivery truck, fuel transport is much more sophisticated and safer than ever before. We believe the most beneficial development in design has been the rear-steer axles on our 6-wheelers, this helps greatly as a lot of our



customers require this for access and it’s also a great benefit to what we are able to carry on board.

“They are now highly specialised with considerable linings to protect the tank as well as prevent leaking and contamination. Tanks are now made from aluminium, for two reasons: one, it’s lighter and can carry more, and two, it doesn’t spark should the truck overturn.

“Other additions that have proved a real benefit are lightweight delivery hoses, which are a big advantage to drivers when required at customer premises, and camera systems. Especially reversing cameras, as they assist with access issues and are also great for the drivers when reversing into narrow properties. They are also excellent should the tanker be involved in an accident to produce essential evidence for the potential claim.”

Ian also comments on how technology has been another helping hand for drivers;

“Technology has greatly improved with OTC computers being the biggest and most beneficial development and WCF were one of the first to go on them. We have had for them for approximately 12 years, first starting with a collaboration with Alfons Haar. We then moved onto Codas and an in-car computer fitted in the cab, before moving on to the Touchstar

unit we have now. One big advantage with the Touchstar device is that it stores the customers’ location and helps drivers going into new areas. Alongside the OTC’s are the sat nav systems, however we still feel they could be improved, but, in summary, have proved a big benefit to the business and driver assistance especially within our terrain.”

Overcoming challenges

When it comes to overcoming challenges, Peter Ellison comments on the importance of driver feedback at Hoyer;

“Most initiatives introduced tend to go through structured trials with full driver engagement. For example; getting the optimum wheelbase is essential for a driver in order for the trailer to follow the tractor unit as true as possible – the wrong wheelbase impacts on the manoeuvrability of the trailer, especially critical in tight restricted petrol station forecourts. Driver feedback helps us make the right choices and decisions.”

With technological advancements requiring regular upskilling and training, it is no surprise to learn that this poses a challenge for fleet managers and drivers. Ian comments;

“As all our businesses embrace innovation, it has proven to be the most difficult challenge for drivers and fleet managers.





“It can be more complicated to be flexible with our fleet when they have different manufacturer’s equipment on and different programming processes. It requires more time for drivers to familiarise themselves with different technology.”

Despite this, Ian goes on to say how WCF Fuels North West has adapted to utilise the full potential of the innovative systems.

“From a fleet managers perspective, it is not easy to diagnose faults and fix problems yourself, typically it will need to be plugged into a computer for diagnostic. However, the equipment is more consistent and reliable now.

“Driver training is constant in our business and we encourage driver champions to guide the team and be involved in technology development.”

Future of the tanker

When asked what will be next for tankers, Peter suggested that there is a “very limited capacity for significant development given the intensely regulated industry (The Dangerous Substances and Explosive Atmospheres Regulations 2002 (DSEAR).”

However, a key focus for Hoyer continues to be around; “finding ways to reduce tanker tare weight in order to maximise payload without compromising the tank integrity, safety and compliance.”

Suggesting that Cobo also feels that there will not be a major shift from the current design of either the rigid or the semi-trailer over the next few years, Joby commented;

“For rigids there will be developments in the metering equipment and how this is either integrated into the truck or into the back office. CANBUS systems may become more common but, overall, there will be no noticeable cosmetic changes.

“For semi-trailers we might start to see some of the API cabinets being boxed in, we



have produced a couple of these for Ireland and it is standard practice across Europe. This does give increased security of the API area but comes at an increase of weight of about 80kg. The drivers that do operate these tend to like them, as the API area is kept clean and away from the road dirt.”

Suttons Tanker and WCF Fuels North West both suggest that technology will play a big part in tankers of the future. Ian commented;

“We hope to see a full telematic system for our tankers where the pumping equipment all links into one package. This would be a great addition!

“If I could add a feature, it would be better satnavs, designed for fuel tankers with improved algorithms, which would be a great addition and assist drivers when delivering. We are excited to see how much further they will evolve, and we will seek every opportunity to embrace new technology within our fleet.”

Mark added;

“In terms of future developments, a key one would be driven from legislation change to increase vehicle weights. Generally, trailers are built to a higher design weight and limited by a lower GB level. Increasing the Gross

Vehicle Weight Rating would naturally increase payload and reduce an element of delivery mileage.

“Future developments on the tanker vessel will likely be around the ancillary parts and components, for example, technology with GPS data, uploading of delivery details and vehicle scheduling. Other developments may be around weight reduction, so potential alternative materials, but these will come at a higher cost. An area where development may be slower is autonomous vehicles due to issues around load security and delivery requirements.

“With an increased focus on sustainability and carbon footprint, the biggest change in the immediate future will be around not only the usage, but also the production and supply chain of alternative fuels. Suttons have a contract with Ryse Hydrogen for the transportation of hydrogen gas which will fuel Transport for London’s buses, as part of their commitment to become a zero-carbon city by 2050.”

We look forward to looking at tankers in more depth in our February issue, as we reveal the winner of the ‘Tanker of the Year 2020’ and look at each entry in more detail.



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In Conversation with Kettlewell Fuels

FOLLOWING THE COMPLETION OF A MANAGEMENT BUYOUT (MBO) TO TAKE OWNERSHIP OF KETTLEWELL FUELS IN APRIL AND WITH JANET KETTLEWELL BECOMING UKIFDA'S 33RD PRESIDENT IN JUNE, WE CATCH UP WITH JANET ON WHAT HAS CERTAINLY BEEN A BUSY YEAR FOR THE KETTLEWELL FAMILY.

Going back over 30 years, tell us more about the origins of Kettlewell Fuels

Based in North Yorkshire near Ripon, Kettlewell Fuels was incorporated in 1987 by my father-in-law, Malcolm Kettlewell. I joined the business in September 1996 to oversee its operation, followed by my husband, Trevor, one month later. We focused on the company's reputation in the local area, which led to growth and expansion, particularly in the domestic sector.

The business started with one tanker; we now have a range of vehicles from six-wheeler tankers to baby four-wheelers. Today, we are proud to be family run and an independent heating and fuel oil supplier. As well as our loyal domestic customer base, Kettlewell Fuels also serves a wider audience that includes the agricultural and commercial sectors.

In April, Trevor and I completed a management buyout (MBO) to take ownership of the business outright from the Kettlewell family. Remaining within the Ripon area, the MBO has provided the opportunity for us to move the business to larger premises.

What was the thinking behind the recent MBO and do you have plans to change Kettlewell Fuels in any way?

Kettlewell Fuels is adapting and thriving, and this is another step forward in the company's 33-year history. Taking sole control means we are in a position to focus our energies on offering our customers an even better service, and one that meets the requirements of

the changing environment.

This includes building a more digitally driven business to serve the demand for online ordering and to provide a much more personalised customer relationship. As an authorised JET distributor, we continue to work closely with Phillips 66 to ensure a continuous UK-based supply of quality fuel as well as building our environmental stewardship to support improved sustainability.

What are the biggest changes you've seen in the industry in your time?

Over the years, the sector has become more challenging, and definitely more competitive, with fewer family-run independents operating due to the market's changing circumstances.

More recently, the emphasis on sustainability and decarbonisation will change how the whole sector will operate in the future.

When did the supply partnership with Phillips start, and what are the main strengths of this partnership?

Our partnership with Phillips 66 started back in 2013 and it allows us to ensure we're delivering the best product and service to our customers from a source that's committed to safety, reliability and environmental stewardship.

We took this route for a number of

commercial reasons and to benefit from the quality service and fuel provided to JET authorised distributors. Most importantly, the Phillips 66 values echo our own here at Kettlewell Fuels.

How does the company see the longer-term future for the supply of diesel, kerosene and gasoil markets?

The move to alternative solutions is going to play a key role in reaching government decarbonisation targets. We are supporting the UKIFDA position and like other members we are investigating new product opportunities.

In the meantime, we take a very proactive approach to informing our customers about how they can contribute to fuel efficiency through our regular e-newsletter, how-to videos and social media activity.

Are you optimistic about the industry's fight for liquid fuel in future heating?

We totally accept that there are big changes ahead for the liquid fuels industry and as the current President of UKIFDA I view it as an interesting time to be involved. We have an excellent team working alongside the UKIFDA committees with many years of experience. We are working together to do everything we can to find a way forward for our industry.

How does Kettlewell Fuels see decarbonisation impacting on its core customers in rural communities and commercial companies?

I very much believe that some within our North Yorkshire community will be early adopters, and others will follow-on naturally when it's time for them to update their systems. It's going to be difficult to change the behaviour and systems used for many generations. The incentive to change will have to be 'worthwhile' for off-grid UK households.





Do you offer any carbon offsetting schemes or plan to get involved with any?

As a UKIFDA member we fully support the organisation's carbon compensation scheme. The trade association has been taking part in the TIST (The International Small Group and Tree Planting) program in Kenya since 1st March 2020 to compensate for the carbon emissions associated with its operation.

UKIFDA has partnered with a member (Portland Fuel) to introduce a scheme whereby Voluntary Carbon Units (VCUs) are purchased to neutralise the carbon footprint of the industry.

Over the next five years, what do you see as the major challenges to the industry and what are the positives?

There are multiple challenges we're going to be facing over the next five years, not least the impact of the recent coronavirus pandemic. Another hot potato is Brexit, which is continuing to deliver uncertainty for our industry.

These factors, coupled with the decarbonisation targets set out by government as I mentioned earlier, will most certainly keep the sector on its toes. As an independent we'll be looking to maintain an agile approach, which will be centred on our customers' evolving requirements.

What would you say has been the key to your success?

The longevity of our amazing team is something we are very proud of. Many have been with the company for over 15 years with the longest serving 20 years! Trevor and I enjoy working with them and they are great ambassadors for our business.

We are both very involved with the day-to-day activities. It is all part of being a family-owned business and taking a true team approach. As I often say, it's the 'Kettlewell cuddle' attitude that makes a difference when it comes to looking after our team and our customers.

Learning from the experts has also been key to our success. It's a very knowledgeable sector and I've been an active member of UKIFDA in various voluntary positions. I've also been involved with other industry organisations and groups where people are happy to advise and share their expertise. It's a great industry to be a part of.

Janet, please can you tell us more about your new Presidency at UKIFDA, and what this means to you?

UKIFDA provides a great platform that allows our industry to blossom, companies to grow and individuals to find answers to their questions. Importantly, it influences the

actions, policies or decisions of officials within the industry and provides representation at government level.

This is a sector full of incredibly hardworking and professional people who, over the years, have supported both me, and Kettlewell Fuels as a business.

Having been a part of the UKIFDA Management Committee for five years and regional representative for Yorkshire and the North East of England, it has been great to see the organisation's transformation into a modern, forward thinking organisation. I am pleased to be a part of its next stage of development.

What are you most looking forward to doing, changing and influencing as President?

First and foremost, I will be working hard to raise awareness of UKIFDA and its benefits to ensure liquid fuel users make UKIFDA members their first-choice provider.

I recognise the importance of decarbonisation and will be working alongside my UKIFDA colleagues to ensure we find the best solutions.

Helping consumers understand the decarbonisation message will be a major focus but I want to ensure that we don't alienate and leave behind those who are vulnerable

and reliant on heating oil – we have to take everyone forward together and I think good communication will play a key role in doing this.

Have you had any advice from Jodie Allan?

Having known Jodie for more than five years and worked alongside her already, I have great respect for her energetic and thorough approach. I admire her for her ability to juggle motherhood, business management and the voluntary role of UKIFDA president. I hope I can follow in her successful footsteps.

What have you personally missed with the Expo not being possible this year and what are you most looking forward to when the industry gets the chance to meet again?

Naturally, I was disappointed that UKIFDA EXPO had to be cancelled in what would have been its 40th year, I have fond memories of my first EXPO in Blackpool and the many

more I have attended since.

It is an important event and a great opportunity for members, participants and industry suppliers to share their knowledge and developments, particularly new product and service opportunities. The event ensures this sector keeps moving forward.

It is also a lively event and great to meet up with familiar faces and, of course, get to meet new people too. It's always good, at the end of a busy day networking, to sit down and enjoy a meal together and have a more relaxed chat.

I know there are some exciting plans coming together for UKIFDA EXPO 2021 in Liverpool. I genuinely do hope that we all get the chance to attend and very much look forward to all being together again – it's been too long!

It has been quite the year for those in the industry, how are UKIFDA members feeling now, looking ahead to 2021.

Due to COVID-19 it's been a challenging 2020 for us, our customers and our suppliers, and I'm sure this has been the same for many of the UKIFDA members.

In 2021 UKIFDA will have a new CEO. Guy Pulham will be leaving behind a fantastic legacy.

As in many sectors, and at this moment in time, we do not know what to expect in 2021.

Being agile and working together will certainly help us through 2021 - whatever it brings.

Do you have any News Year's resolutions, and if so, what are they?

Happy family, successful business and embracing life with a smile!



Janet and Trevor Kettlewell

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In Conversation with Glen Fuels

SINCE OPENING ITS DOORS IN 1986, IN CO. WICKLOW / CO. WEXFORD, GLEN FUELS HAS ALWAYS STAYED ONE STEP AHEAD. CONSTANT EVOLUTION HAS ENSURED THAT THE BUSINESS HAS SURVIVED THE TOUGH TIMES AND EXPANDED IN THE GOOD. OUR IRISH CORRESPONDENT AINE FAHERTY CAUGHT UP WITH MANAGING DIRECTOR, **ALAN KEYES**, TO FIND OUT MORE ABOUT THIS DISTRIBUTOR WHO BEGAN IN OIL AND NOW OFFERS 'ENERGY FOR EVERYTHING'.

Glen Fuels has a commitment to environmentally sustainable business growth. In what way does this affect the way you operate?

We are very conscious that the market is constantly evolving and, if we don't evolve with it, and preferably in advance of that evolution, we will be left behind.

Describe the journey Glen Fuels has taken from its beginnings in 1986 to the present-day company

My brother Kevin and I currently own and run the business. It was started in 1986 by our parents, Kevin Snr. and Miriam. Dad was a high-flyer in Irish Shell at the time (that's what he tells us anyway) and Mum was from the Wicklow / Wexford area. Irish Shell was looking to expand their distributor network in those areas at the time, so they decided to join the ranks of the self-employed leaving the cushy, pensionable job behind.

Kevin and I jumped in around 1990 – the business grew slowly and surely through those difficult times.

As everybody involved in the distribution business knows, it's very tough but also very enjoyable. You meet great people along the way - customers, staff, suppliers, stakeholders - who each helped the business grow.

Mum and Dad retired in the early noughties and with the advent of the Celtic Tiger and Irish Shell being bought out by Topaz, we experienced great growth. This came to a shuddering halt with the financial crisis. Tough times indeed but we learnt a lot and these lessons prompted us to reassess our business model.

We expanded into different geographical areas organically and by acquisition and it has certainly paid dividends. We currently operate out of 5 depots in the South East and are always on the look out for more opportunities.

The current Covid situation is yet another curve ball thrown at everybody. Hopefully it too will soon pass or, at worst, become manageable. It has changed how we all work but as I said above, that's the market evolving so we must evolve with it.



You have certainly been leading the way in Ireland in terms of the energy transition, readily adopting energy alternatives and becoming the first and only company in Ireland to deliver both traditional and renewable energy solutions to all your customers when you founded Glenergy in 2015.

What do you think has made you so open to change where others have perhaps resisted?

We have an in-house joke in Glen Fuels that "change isn't good!" Our belief is that if you don't change, you will be quickly left behind.

The way that we all live our lives in the past 10 years has changed beyond all recognition. It would be foolish in the extreme to think that the oil distribution business would or should be any different.

As you approached your 30th anniversary in 2016 you evolved your original tagline 'Oil for Everything' to reflect the modern, dynamic and forward-thinking company that is Glen Fuels – with the new tagline 'Energy for Everything'.

How has the business continued to evolve over the last 5 years?

6 years ago our product offering would have been oil products only. I remember surveying our lost customer databases and going through their responses. They had changed their energy requirements from oil to gas, geothermal, solar, heat pumps, passive heating, CHP, biomass, things that we had never even heard of!

So we decided to get into those markets. We joined up with a few very intelligent people, combined the collective and set up Glenergy. We hit some speed bumps along the way, made some mistakes by chasing the wrong markets but I think we have now found Glenergy's milieu.

Glen Fuels is still the mother ship but there are lots of synergies between the two businesses that are proving to be very fruitful.

Do you have any further geographical expansion planned?

We would most definitely be open to opportunities should they arise. We have very strategic cover in our depot network in the South East but would like to tack on one or two more but I can't tell you where!

We are currently in the process of branding our second retail station, in Co. Wexford, and this is a market that we'd like to grow in the near future.

Does being at the forefront of the energy transition remain key to the Glen Fuels strategy over the coming years and where do you see this taking you as a business?

Very much so. We are constantly looking at new technologies and products. I can see us being involved more in the design side of energy solutions for the end-user. These solutions will include synthetic fuels, hydrogen cells, electric vehicle charging, water – the list and potential is endless.

We believe that the energy evolution will continue at pace and we would like to be part of that evolution.

What actions have you already taken to green your own distribution activities?

We have, very recently, partnered up with Eirscope, a Galway based software firm that manufactures the Magnus Monitor. We hope to distribute these amongst our customer base to improve our logistics and reduce those expensive trips to fill half empty tanks.

At present we don't have any alternatively fuelled vehicles but we will most definitely have some light commercial EVs in the near future. I think that EV trucks may be a while away yet, but once they are available, we will be in that space.

Looking to the future how does Glen Fuels see decarbonisation impacting on its customers?

Our view is that there will always be a need for

Fuel Oil News – our own journey of diversification

oil, certainly for the rest of my lifetime anyway. It's not going to disappear. This has been signalled by the likes of the International Energy Agency. The decarbonisation should happen over a series of steps – improve the emissions from boilers and improve insulation being two simple steps. These two steps alone will have a dramatic effect on the carbon emissions but also on volumes of oil consumed.

This is the big challenge for the industry. Reduced volumes which will definitely lead to further rationalisation in the marketplace. I hope that this won't change the way that we interact with our customers as we see ourselves as local and part of the communities.

How does the company see the longer-term future for the diesel, kerosene and gasoil markets?

The current Covid situation has thrown a few curveballs into the supply chain. The way that business is contracted between a distributor and its supplier will change. Formal Supply Agreements will become the norm and the days of a non-contracted distributor rocking up unannounced to a terminal to fill up will be gone.

The huge demise of the aviation sector will have an effect on the kero market, and it remains to be seen how the refiners can get around the uncertainty of what happens with supply. Nominations and even draw and average stock levels will be a minimum requirement from the distributor's perspective.

Are you optimistic about the industry's campaign for liquid fuel heating?

Given that I am a life-long supporter of both Greystones Rugby Club and the Wicklow GAA Football team, I'm optimistic by nature!

Yes, I'm very hopeful that the industry will get a fair hearing and that recommendations will be taken on board. It's not feasible to have an energy policy without oil being part of it, both in the short and long term.

Over the next few years, what do you see as the major challenges and positives for the industry?

To adapt and evolve, or you will get left behind.

Positives? We have all experienced change in our industry many times before, so when these new changes come down the line, we will embrace them and move on and wonder what all of the fuss was about!

We will follow the continuing evolution of Glen Fuels with interest. If you would like to talk to Fuel Oil News about the way your business is adapting, please get in touch:

margaret@fueloilnews.co.uk

Friends of Fuel Oil News may already know of its founder's own history in the fuel oil industry which started back in the early 1900s.

Albert Smith, great-grandfather of A&D Publishing's current managing director Nick Smith, bought Ashley and Dumville when it came up for auction in 1905. The business, which had been selling coal and coke from horse-drawn carriages since 1880, continued on this path until Sir Albert's oldest grandson, William, took over the reins of the business in 1954.

Seeing a clear need to diversify for the business to survive the post war changes, the company moved into oil distribution in 1957. The company's first purpose-built tanker (shown here), was an ERF built in Sandbach, Cheshire.

Following in William's footsteps, Albert's grandson, Jimmy Smith, established the Knutsford Domestic Fuel Oil Company in 1975 to serve a growing market in home-heating.

Having worked as a journalist and newspaper proprietor in his early career, Jimmy used his experience to launch a newsletter for the region's fuel oil distributors. Enthusiastically received, as a vital means of sharing important news and other communications between those involved, in 1977 it expanded and launched as a national title – Fuel Oil News magazine – and continues to be the voice of the industry to this day.

The 1980s saw Jimmy begin supplying fuels to the industrial and power generation markets by sea and road, and in 1998 Nick Smith joined the family business. At a time of declining sales for coal and fuel oil, Nick diversified the business further, having identified a need for a specialised recruitment provider to the industry. To meet this need, Nick founded A&D Publishing's sister company, the then-named Oil Recruitment, which successfully rebranded to Eleven Recruitment in 2018.

With recruitment and publishing running side-by-side under the parent company Ashley and Dumville, the publishing arm launched a new quarterly journal, Oil Installer, in 2007 followed, a year later, by Renewable Energy Installer. The addition of Bulk Distributor in 2010, a bi-monthly journal for professionals involved in the international distribution and logistics sector, brought another complementary title into Ashley and Dumville's publishing portfolio, and all titles still continue to deliver quality content to their respective niches.

Immersed in an industry that has continually adapted and diversified to remain vital in a constantly evolving energy landscape, Fuel Oil News continues to look ahead. As the next phase unfolds, we look forward to welcoming and incorporating new challenges and opportunities whilst continuing to be the voice for the fuel distribution community.



Ashley and Dumville's first purpose-built tanker – an ERF built in Sandbach, Cheshire



PORTLAND MARKET REPORT

NOVEMBER
IN VIEW

A SEASONAL TWIST ON CURRENT GLOBAL CHALLENGES

Minutes from Christmas Preparation Meeting, North Pole Inc. The North Pole. 11am, Dec 1st 2020.

Present; Santa Claus (Chair), Mrs Claus (Company Secretarial), Reindeer, Works Representatives

Santa (SC) brought the meeting to order at 11am sharp.

Item 1 – Present Supply; Chief Economist Pixie Boot reported on the latest figures from OPEC (Organisation of Present Exporting Countries) and the WTO (World Tinsel Operations), that showed a huge global glut of both presents and wrapping paper. Pixie informed the meeting that as a result, there should be no problems in sourcing all the required toys for all the girls and boys (plus non-binaries).

“SHE HAD NOT BEEN ABLE TO SEE RUDOLF’S RED NOSE BECAUSE OF HIS FACE MASK.”

Item 2 – Present Preparation; Elf Trade Union Leader Red Dwarf (RD) reported that things were not going so well in this area. He pointed out that whilst being a clear signal of positive environmental intent, the recent boycott of petroleum products in the North Pole had now backfired, with insufficient volumes of hand sanitizer being available. This had resulted in the Present Wrappers refusing to work in the warehouse because they did not deem the premises “covid secure”. In addition, half of the Sellotape Snipping Dept were now off, self-isolating. It was agreed that SC and RD would hold a zoom call with the absent workers to discuss concerns.

Before moving onto item 3, Mrs Claus (MC) admonished Dasher for playing with his phone. Dasher responded that it was not him, but Rudolf playing with the phone and tweeting selfies to his 2.3bn followers. MC apologised and said that she had not been able to see Rudolf’s red nose because of his face mask.

Item 3 – Transport; Chief Reindeer (and general showboater) Rudolph brought Board Members up to speed with the extensive problems that were also affecting transport preparation. As a result of social distancing rules, only 5 reindeers would be able to pull the sleigh, with the extra power required being provided by a stand-in diesel generator. With diesel so cheap these days, this was a fairly cheap workaround solution. However, it did present challenges with regard present delivery to urban areas located in Low Emission Zones and copious amounts of urea based Diesel Emission Reducer (AdBlue) would be required. At this point, Dancer stepped in and reminded meeting attendees that the entire reindeer team had been “on the sauce” for the duration of November and that this had now generated ample liquid urea for the manufacture of AdBlue. SC thanked the reindeer crew for their “efforts” and offered Dancer a couple of paracetamol. MC further opined that total emissions for the 2020 sleigh should be neutral versus 2019, as increased diesel consumption would be negated by reductions in reindeer methane (with only half the number of reindeers in action). This prompted a furious argument amongst the reindeer about who emitted the most methane and why it was always so much worse to be at the back of the sleigh train.

Item 4 – Proposal from Krampus Claus (KC); The representative for the South Pole suggested cancelling Christmas because of “all the bad sh1t that’s going down at the moment”. SC responded that as a minority shareholder, KC did have the right to make such proposals, but that they almost always involved cancelling Christmas or moving operations to the South Pole. SC also stated that as CEO and Chairman of North Pole Inc. he would be vetoing this item. MC then asked why KC only attended meetings in times of upheaval? She pointed out that his last attendance was in 2008 during the Financial Crisis, when he had presented a paper on the cost savings involved in using penguins to wrap presents, rather than elves (and paying the penguins in fish). KC offered no response.

Item 5 – Administration; It was noted that 2020 would be the last year of free reindeer

movement into the United Kingdom and that work would be needed in the new year to ensure tariff-free present access in the future. MC would take this action forward, although she pointed out that like all sectors, the gift industry was waiting for the OFT (Office of Festive Trading) to deliver on their long-promised “oven-ready” Brexit deal. RD gleefully asked colleagues to remind him “never to eat food cooked in that oven”, because it must be “bloody useless”. There was polite laughter from other Board Members in response to this.

“THIS PROMPTED A FURIOUS ARGUMENT ABOUT WHO EMITTED THE MOST METHANE.”

Item 6 – Any Other Business; It was noted that a badly written letter, with lots of CAPITALS had been received from a Donald (aged 74¼) in Washington DC, requesting another 4 years in his big white house. SC commented that whilst North Pole Inc. was in the business of delivering miracles, a line had to be drawn somewhere and that therefore, the letter should be conveniently “lost” (with blame being apportioned to the US Postal Service). There was general agreement to this, along with appreciative (and more fulsome) mirth for SC’s quip that the individual in question “was fired” and that now was the time to “Make Christmas Great Again”.

On that note and at 12.25, the meeting was brought to a close.

Post-script; Despite all the challenges, Santa and his team once again delivered and Christmas 2020 was a triumph! Season’s Greetings to one and all!

For more pricing information, see page 26



Truck drivers and cyclists: essential safety advice

At time of writing we are in 'Road Safety Week 2020', the UK's biggest road safety event, which is coordinated annually by Brake, the road safety charity. Designed to stimulate community involvement, the event has great scope to reach many people across the nation and remind them of road safety, thus potentially preventing many accidents. Fuel distribution is an industry well renowned for its unwavering focus on and commitment to safety but, with one of the impacts of lockdown being the reduction of motorised vehicles on the nation's roads and the subsequent increase in the number of bikes, we hear from Brake as they revisit the challenges this presents to truck drivers.

Every professional truck driver knows that encountering cyclists on busy roads can be a major source of stress, demanding extreme levels of concentration and patience, especially in the face of sometimes careless or dangerous behaviour from riders. Thankfully, due to the focus and skill of drivers, the vast majority of truck/bike encounters pass without incident. But there are now urgent reasons why drivers need to redouble their efforts.

1. There are even more bikes on the road

According to the UK's Transport Secretary, Grant Shapps, there's been a huge increase in cycling across the country due to Covid-19, as many people are discouraged from using public transport. Estimates suggest an increase of up to 100% on cycling journeys being made during the week, and a massive 200% at weekends.

2. There will likely be more fatalities in 2020

There's no new data yet to suggest any change in the number of commercial vehicle journeys and it's still too early to assess any possible impact on the numbers of accidents and fatalities. But with fatal cycling accidents before Covid-19 averaging around 100 per year, it's possible that we can expect more fatalities when 2020 numbers are counted due to the increasing number of cycle journeys.

3. Most serious accidents involve trucks turning left

Sadly, HGVs are involved in as many as 20% of fatal accidents involving cyclists. And perhaps, not surprisingly, it's left turns that lie at the root of many of the worst incidents.

4. There's a minority of reckless riders

Both professional commercial drivers and regular cyclists know that trucks and bikes don't mix well. The vast majority of both parties drive and ride defensively and with high levels of awareness. Unfortunately, there's a small minority who aren't so responsible on the roads and they sometimes put themselves and others in great danger – as well as giving both drivers and riders an undeserved reputation.

5. Better visibility means fewer incidents

Professional drivers are well drilled and regularly tested in the potential dangers and correct procedures where cyclists are concerned.



Improvements in mirror systems and the introduction of cameras have greatly enhanced the driver's visibility and eliminated most blind spots. Drivers are trained to look several times and to pull back before turning left if a cyclist is in the picture on the inside, perhaps losing a few seconds in order to potentially save a life.

6. Road safety is still not mandatory for cyclists

Although there is surely a strong case for it, road safety training for cyclists is currently not compulsory, although courses are readily available nationwide. Proper training for cyclists, especially those new to riding, could help both cyclists and professional drivers to stay safer on the roads. In the meantime, it means drivers often bear the weight of responsibility.

7. Check your mirrors – and keep checking



Awareness, thinking ahead and common sense together make up the simple but powerful formula for safe engagement between trucks and cyclists. The driver should check multiple times in mirrors and screens before indicating an intended left turn as early as possible. A cyclist

should keep looking ahead, be especially aware of large trucks and other vehicles, and keep a sharp watch on their indicator lights. Under no circumstances should a cyclist try to 'undertake' a truck that's indicating left, even if it's stationary in traffic, waiting to turn.

8. Always follow the rules – especially because some riders don't

Unfortunately, drivers know only too well that some reckless riders do exactly that and worse. That's why the rules of engagement for commercial vehicle drivers are so essential. You simply can't assume cyclists will follow the rules, so it's doubly important that you do so as a driver. It's worth regularly refreshing your knowledge of the Highway Code just in case.

Is hydrogen's time now?

OUR JULY ISSUE LOOKED AT HYDROGEN AS A FUEL OF THE FUTURE, A SOLUTION THAT CAN BE AND IS BEING READILY USED IN THE TRANSPORT SECTOR AND AS A POTENTIAL SOLUTION FOR HOME HEATING. BUT IS HYDROGEN'S TIME NOW? CONTENT EDITOR STEPHANIE SAMUEL CAUGHT UP WITH RYSE HYDROGEN'S FOUNDER AND EXECUTIVE CHAIRMAN **JO BAMFORD** ON THE ROLE THAT HYDROGEN IS CURRENTLY PLAYING IN THE ENERGY TRANSITION, AND HOW THE FUTURE IS LOOKING.

Can the UK realistically reach its carbon goals without hydrogen?

In short, no and this is for several reasons. If you stick with batteries and electricity your restriction is going to become the national grid and problems with the grid will arise if you go above 15% electrification. If you wanted to start running all of the cars in the UK with batteries you'll need to put in 2,300 charging stations between now and 2050 – that's 2,300 holes, meaning every single road will be dug up in the UK permanently.

And that's just cars – you also have planes, trains, ferries, shipping etc. For ships, where would the charging stations be, the middle of the ocean? It can't work.

Charge times also take much longer with heavier and larger vehicle batteries. Your distance gets shortened and it becomes much less practical.

“IT DOESN'T HAVE TO BE HYDROGEN – BUT HYDROGEN IS A WORKABLE SOLUTION”

Jo declared that 'Hydrogen's time is now' – why do you believe in hydrogen as a future fuel?

It doesn't have to be hydrogen, but hydrogen is a workable solution. When do you have mass adoption of zero emissions fuel? When it costs the same, when it does the same and when it's easy to fill up because, fundamentally, one of the most difficult things to change is human behaviour.

Going green is not most people's number one choice when they get their vehicle, it's a 'nice to have'. The only solution that starts to be able to operate in the same manner as traditional fuels is hydrogen, meaning that this green fuel could be the alternative fuel that doesn't need to be thought about.

But how do I get as much of the whole



supply chain as possible so that I can make it cost the same? When it costs the same and does the same, it shouldn't be the greatest thing since the second coming, it should be I got in my car and got to work. You shouldn't have to think about it. We want to provide an alternative fuel that works.

What are the greatest difficulties facing the UK hydrogen market today?

The greatest problem is marrying up supply to demand. There is no point moving forward with supply if there is no demand, or vice versa.

With buses, which are ready today, they fill up at the depot every night – this is the demand and with that demand we continue production to ensure that demand has the supply it needs.

We are at the very beginning of this journey. No one knew what oil would become but this is a similar sort of thing. This is the beginning of a hundred-year megatrend, in the same way that oil was. This is a green fuel, made in a green manner and could power the future for the next 100 years.

Japan and Korea are probably more advanced than the UK in terms of products, rather than production. Australia has also been looking into hydrogen over the last 18 months, but, as an export nation, this would be transported around the world. California is also driving it, being a very green location.

Europe will also get going over the next 4 years, with Germany spending 9 billion euros

on hydrogen, France 12 billion euros and even Portugal who are going to be spending 6 billion euros. So, the EU is looking to spend at least 100 billion euros on hydrogen over the next 10 years.

If we don't start now, we risk being left behind.

Will Brexit affect the development and production of hydrogen?

Business finds a way to operate on a global basis. Whatever happens in politics, my job is to find a way to operate on a global basis and in a world market.

Does hydrogen lend itself to being used as a fuel for trucks, tankers and HGVs?

This won't happen in the next five years. The problem with trucks is that you have to have filling stations up and down the motorway, which will cost a hell of a lot of money. Even then, you'll only have a few trucks filling up per day. It will likely happen, but not today.

“WHAT CHINA DID IN BATTERIES 10 YEARS AGO IS WHAT WE SHOULD BE DOING WITH HYDROGEN NOW.”

How can we move forward to ensure that the refuelling network for hydrogen is put in place, and what will this look like?

I'm very focused on 'where does it start?'. I think we need to get the whole hydrogen economy going in one area before rolling it out. It's chicken or egg. Do we start with the refuelling stations and then bring in the cars, or do we change half of all cars to hydrogen and then put in the filling stations to ensure mass adoption? You need a government to start putting that in place.

We don't need any changes; it will get going, but what we do need is government



subsidy to help on the production side. Take buses for example. I can deliver hydrogen for the same cost as diesel today, but a bus that runs on hydrogen is twice as expensive as a bus that runs on diesel.

In the UK, we have 15 hydrogen fuelled buses in Aberdeen, 20 going into London in January, 20 going to Birmingham early next year, 3 will go into Dublin and 3 will also be going into Belfast. We have got the trials at this point in time.

As we are doing, the key is to focus on one area, get it right and then expand out. As a government, you have to closely observe when the trial goes from being a science experiment to a reality, and this is much harder to see when you're trying to be everything to all men. Seeing when the supply marries up to demand is key.

Do you see hydrogen being used in any other ways, commercially or domestically?

There are only two solutions for home heating really – heat pumps or hydrogen.

Why are people not adopting these yet? It takes 24 hours to turn a heat pump up or down – we don't want to wait 24 hours; we want to



be hot when we're cold and cool when we're hot.

It is because of this that hydrogen makes a nice and neat solution for home heating, but, at this point in time, hydrogen heating is too expensive.

What will create a tipping point in the adoption of hydrogen as a future fuel?

What china did in batteries 10 years ago is

what we should be doing with hydrogen now. China decided that batteries were going to be the future and as a country they invested in it properly and created a big enough market to get volume up. Now China has 73% market share of all the world's batteries. They are about to do the same on hydrogen.

If we don't get going, in about 2 years' time, other countries will eat our lunch and we won't have any of it.

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The changing competitive landscape of the current millennium



The 1990s provide a foretaste

The downstream competitive landscape, in both the UK and Ireland, displayed remarkable stability in the 25-30 years leading up to the 1990s. The first change in the UK came in 1990 with the sale, by the US company Amoco, of its refining, distribution and marketing interests to the French company Elf, who had first entered the market in 1975 with the purchase of Isherwoods' Petroleum VIP business from Oxy. The 1990 change was followed, in 1997, by the BP acquisition of Mobil's European downstream assets and, in the same year, by Shell acquiring Gulf Oil's refining, distribution and marketing interests on the latter's market exit.

This decade also saw three refinery closures – Shell Teesport and Shell Haven and Gulf, Milford Haven.

In Ireland, a new entrant arrived in the form of the Norwegian company Statoil who acquired, first, BP's interests in 1992, and, subsequently, those of Conoco subsidiary, Jetoil, in 1997.

These changes were but a modest foretaste of what the 2000s would herald in both countries.

Two decades of significant changes

In several respects, the competitive landscape in both the UK and Ireland is now much changed from that which was in place 25 years ago.

UK

The chart to the right provides a summary of the landscape's evolution since 1995.

Some words of explanation will serve to highlight the principal developments which underlie the changes detailed in the chart.

- Straddling the end of 1990s / early 2000s were two significant European mergers in which **Total** acquired, first, Belgian company **Petrofina** and, then, a couple of years after, French

competitor Elf.

These mergers materially expanded **Total's** footprint, propelling it to the status of 'Major' in the market; it also inherited **Fina's** 50% share of Lindsey oil refinery and **Elf's** 70%, with **Murco** holding the other 30%, of Milford Haven refinery. In 2011 **Total** divested of its retail outlets and equity distributor business (**TotalButler**) to **Rontec** (who, in turn, divested of the dealer sites and distributor business to **DCC Energy**) to become a refiner/wholesaler.

In 2020 **Total** has reached agreement with **Prax Petroleum** on the sale of Lindsey refinery along with its interests in terminals at Kingsbury (WOSL) and Buncefield (HOSL) as well as Finaline.

- In 2001 **Phillips Petroleum** sold its Teesside refinery and wholesale fuels business to Dutch company **Petroplus** (later to be headed up by US oil industry 'luminary' Tom O'Malley). In 2007 **Petroplus** acquired **BP's** Coryton refinery as part of a wider refinery acquisition programme, buying plants in France, Switzerland, Germany and Belgium. Teesside refinery was closed in 2009 and Coryton in

2012, following **Petroplus's** collapse.

- In 2002 an international merger between **Conoco** and **Phillips Petroleum** took place to form **ConocoPhillips**; ten years later the company split into separate upstream and downstream entities, the latter being called **Phillips 66**.
- **BP** sold its Grangemouth refinery to **Ineos** in 2005, with the latter entering into a 50/50 joint venture with **Petrochina** in 2011 to form **Petroineos**.
- **Futura** was renamed **Harvest Energy**, in 2005, with a change of ownership; **Harvest Energy** was acquired by **Prax Petroleum** in 2015.
- **Shell** sold its Stanlow refinery to Indian company **Essar**, in 2011, with the latter establishing a presence in the retail, commercial and aviation markets.
- **Chevron**, which had acquired the Texaco business, in 2000, sold it to **Valero** in 2011.
- **GB Oils**, a wholly-owned subsidiary of Dublin based **DCC**, was renamed **Certas Energy** in 2013.
- **Murco**, having acquired **Total's** 70% share

CHANGING COMPETITIVE LANDSCAPE

	1995	2010	2020	2050?
Major oil companies	BP, Esso, Shell	BP, Esso, Shell, Total	BP, Esso, Shell	
Mini Majors / Mid Size Refiners	Conoco, Elf, Fina, Gulf, Mobil, Texaco, Total, Murco, Phillips	Conoco Phillips, Ineos, Petroplus, Texaco, Murco	Phillips 66, Petroineos, Essar, Total, Valero	
Resellers / Wholesalers / Importers	Burma, Q8, Repsol, Futura, Mabanaf, Greenery	GB Oils, Greenery, Harvest Energy, Mabanaf, Prax Petroleum, World Fuels	Certas Energy, Greenery, Prax Petroleum, Harvest Energy, Mabanaf, Puma Energy, World Fuels	



in 2007, closed its Milford Haven refinery in 2014 and exited the UK market in 2015, selling its logistics/distribution and wholesale fuels interests to **Puma Energy** and its retail interests to the UK's largest independent dealer group, **MFG**.

Take-aways:

1. The 'Majors' have largely retreated from their former dominant position of the second half of the 20th century when they supplied circa 55-60% of the inland market. An exception being the aviation fuel sector, where they continue to dominate at the country's two main airports, Heathrow and Gatwick.
2. The middle 'tier' of the landscape has seen a significant 'shrinkage' in the number of participants, from nine 25 years ago to the current five, as a result of withdrawals, take-overs and consolidation.
3. The market position of the wholesalers/ importers has substantially grown from around a 7% share at the start of the millennium to between 35-40% now,

and even higher in ground transport fuels (circa 45%). Two companies have featured especially prominently:

Greenery, which started in 1992, is now the market leader, with national distribution coverage and a particularly strong position in the supply of products to supermarkets, especially Tesco & Sainsbury. Supermarkets as a group now supply around 45% of the road fuel market (cf. around 6% in 1990). Greenery is now majority owned (85%) by Canadian infrastructure fund, Brookfield Business Partners.

Certas Energy is a wholly-owned subsidiary of Dublin-based FTSE100 company DCC, which entered the market in 2001 by buying BP equity distributor Scottish Oils, and then, over the ensuing 15 years, embarked on an ambitious distributor acquisition programme, which included the equity distributor businesses of **Shell (Shell Direct)**, **Texaco** and **Total (TotalButler)**.

REPUBLIC OF IRELAND

Changes in the landscape are identified in the chart below.

Highlighting the key developments during this millennium:

- In 2001 the government sold Whitegate refinery, operated by the **Irish Petroleum Company Ltd. (IPCL)** to the US company **Tosco Corporation** which was, shortly after, acquired by **Phillips Petroleum** which, in turn, merged with **Conoco** in 2002. **ConocoPhillips** tried unsuccessfully to sell the facility in 2007; in 2012 it came under the ownership of **Phillips 66**, who sold it, in 2016, to family owned Canadian oil company **Irving Oil**. In 2018, **Irving Oil** acquired the large independent **Tedcastle Oil Products (TOP)**, providing it with a distribution terminal in Dublin and, hence, substantially expanded market reach.

- In 2002 **Maxol** acquired **Estuary Fuels**, sold it to **Inver Energy** in 2009 who, in turn, sold it to **East Cork Oil** in 2010.

- In 2003 **Stafford Fuels** acquired **Campus Oil**.
- In 2005 a new legal entity, **Topaz Energy**, was set up by private equity interests to acquire first, in 2003, the **Shell** business followed, a year later, by **Statoil** and, in 2014, by **Esso**. In 2016, **Topaz** was acquired by the Canadian convenience group, **Alimentation Couche Tard**, who has replaced the **Topaz** brand with its own, **Circle K**, brand. The combined entity constitutes by far the largest market participant, with a share in excess of 30%.

- In 2017 **Greenery** acquired **Inver Energy** and earlier this year agreed to buy **Amber Petroleum**.

Take-aways:

1. Of the original mainline companies who owned Whitegate refinery – **BP, Esso, Shell & Texaco** – only the last named, now under the stewardship of **Valero**, remains a supplier to the market; it is probably not a coincidence that the company's Pembroke refinery is substantially the largest (in excess of 50%) supply source of the country's oil requirements.
2. The new owner of Whitegate refinery, **Irving Oil**, has significantly extended its market 'footprint', cf. that of the prior owner, well beyond the Munster region through its acquisition of the **TOP** business and, with it, a terminal in Dublin providing ready access to the local and wider Leinster market
3. Locally owned independents have always played, and continue to do so, an important role in supplying the market – companies such as **Applegreen, Campus/ Stafford, Maxol, LCC Oils, Corrib Fuels, EMO, East Cork Oil, and Jones Oil**. This provides consumers with a healthy range of choice!

CHANGING COMPETITIVE LANDSCAPE – IRELAND

	Early 1990s	2010	2020	2050?
Mainline Oil Companies	Esso, Shell, Texaco, Jetoil, BP, IPCL	Esso, Topaz, Texaco, Conoco-Phillips	Circle K, Valero, Irving Oil	
Large Independents / Resellers	Burmah, Maxol, TOP, EMO, Campus Oil, Stafford Fuels, East Cork Oil, Amber Petroleum, Corrib Fuels, Inver Energy, Jones Oil, Estuary Fuel	Maxol, TOP, EMO, LCC Oil, Campus-Stafford Fuels, Amber Petroleum, East Cork Oil, Corrib Fuels, Inver Energy, Jones Oil, Applegreen	Maxol, EMO, Campus-Stafford Fuels, LCC Oil, East Cork Oil, Greenery, Corrib Fuels, Jones Oil, Applegreen,	

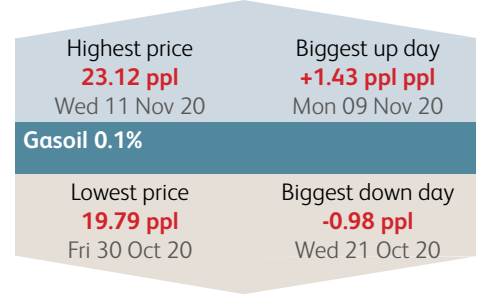
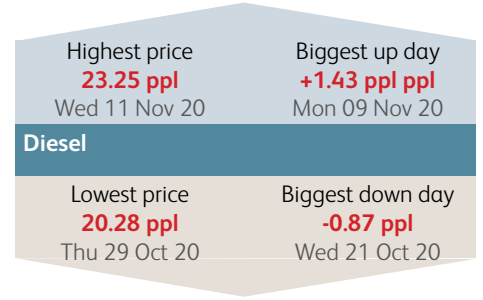
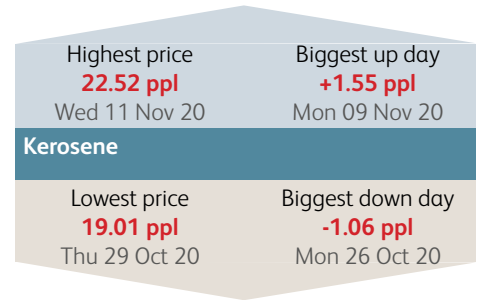
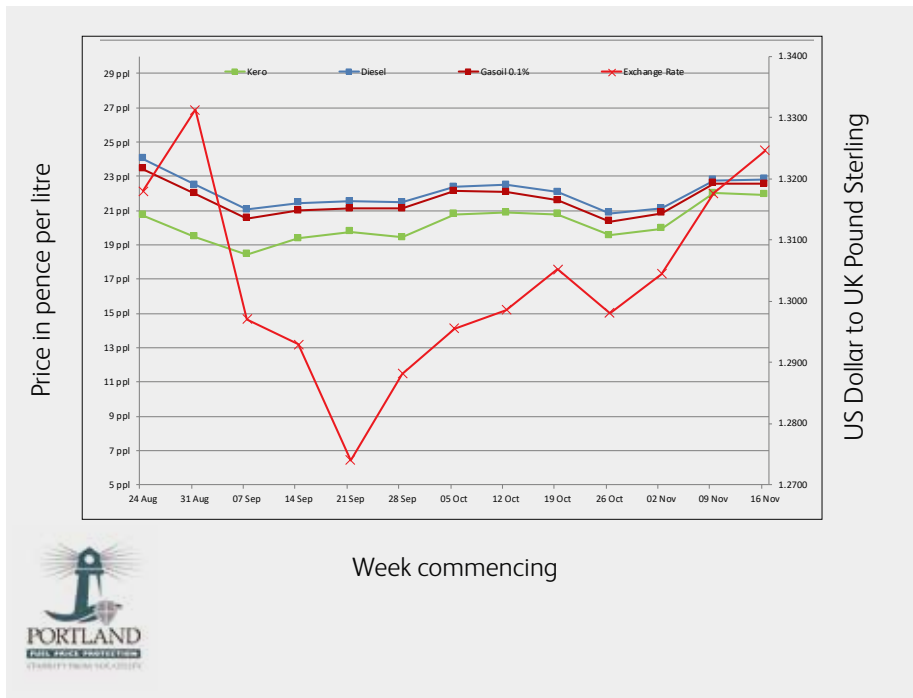
What will the competitive landscape in both countries look like in ten years? It seems unlikely that we will witness the amount of change experienced since the start of the current millennium. However, given the prospect of a plateauing and, then, possibly, decline in market demand, further consolidation must be on the cards.

Those who prosper will be the ones who most successfully adapt to and navigate the 'energy transition' by positioning themselves to take best advantage of the opportunities it offers AND, where necessary, to pursue and develop entirely new or different revenue streams.

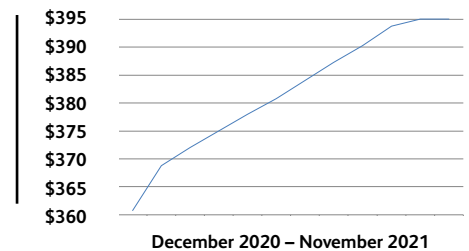
Wholesale Price Movements: 19th October 2020 – 18th November 2020

	Kerosene	Diesel	Gasoil 0.1%
Average price	20.78	21.89	21.54
Average daily change	0.51	0.50	0.52
Current duty	0.00	57.95	11.14
Total	20.78	79.84	32.68

All prices in pence per litre



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	23.02	35.67	83.19	26.24	38.11	86.45
North East	21.97	34.30	82.27	26.34	36.54	84.66
North West	23.54	36.90	84.66	26.67	39.05	86.81
Midlands	22.04	34.83	82.73	25.00	37.05	85.33
South East	22.14	34.79	82.71	28.26	38.66	84.96
South West	22.49	34.63	82.55	26.47	36.84	84.61
Northern Ireland	22.60	36.00	n/a	25.55	38.76	n/a
Republic of Ireland	36.36	41.43	84.13	39.75	43.88	86.79
Portland	20.35	32.35	79.42			

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 <https://portland-fuel.co.uk/pricing>.

WELCOME ONCE AGAIN TO 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.

HERE, WE SPEAK WITH OWNER OF MARSH FUELS, **CARRIE MARSH**, WHO IS ALSO, CURRENTLY, SENIOR WARDEN TO HRH THE EARL OF WESSEX, ROYAL MASTER OF THE WORSHIPFUL COMPANY OF FULLERS, AND FIND OUT MORE ABOUT HER ISSUE WITH THE DISPOSAL OF USED TEA BAGS.

"KETTLE'S ON!"

CARRIE MARSH



Carrie Marsh

Give your career history in 25 words or less

Admin, theatre lighting, design department support for leather goods, joined family business Marsh Fuels as boiler engineer in 1997, HGV driver, now MD.

Describe yourself in 3 words

Determined theatrical sparkle!

What were your childhood / early ambitions?

To see where life took me.

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

Costume making at the RSC ... or ... VOSA – to catch out all those who flout the safety of other road users when we have always taken it so seriously.

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

Never instantly reply to a letter/ email in anger – always sleep on it.

Share your top tips for business success

Learn from the bottom up, know what's going on and be open to change.

What's your most recent business achievement of note?

Keeping the business running, staff and customers safe while personally quarantining and home schooling at the same time as well as pre-empting the next safety measures and how to implement them remotely!

Tell us your greatest fear

That we could, and my children, lose hugs and personal contact and live behind Perspex screens, masks and '2m apart' signs forever.

Which is most important – ambition or talent?

To nurture both. You can have ambition without natural talent or talent with no ambition. Both can thrive.

What's the best thing about your job?

Being a small family business, I know lots of our customers, we have a small and close band of staff and I still get to drive the tanker!

Which is the quality that you most admire?

Selflessness.

What are you most likely to say?

Kettle's on!

What are you least likely to say?

I can't do it.

Describe your perfect day

Somewhere with the touring caravan (York/Sandringham). Waking up to a crisp morning, wrapping up and going off to explore, including woodland trails. Find a hearty pub meal then sit with hubby, myself with a blanket

Carrie trying her hand at ice skating at Somerset House, London



over my knees in the evening hand crafting (making a rug) while the kids snooze in bed.

Do you have a favourite sports team?

The England Rugby team!

What's the biggest challenge of our time?

Aside C19, marine polluting plastics. With micro plastics being found in fish miles below the surface of the sea, we have to act now.

Cheese or chocolate?

I'm a Cadburys girl!

Share your greatest personal achievement

Being, subject to election, installed as Master Fueller in the Worshipful Company of Fuellers, a London Livery Company re-formed in 1984 with my Grandfather, Frederick Marsh, in the room at the time. In the meantime, serving my year as Senior Warden to our Royal Master HRH The Earl of Wessex.

What's your pet hate or biggest irritant?

When somebody puts a new bin bag in the office bin and doesn't flap it about first to fill with air. You know, that moment you drop the tea bag in, and it just sits

there at the top with the bag vacuumed together beneath!

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

Pass "Sophia's law" to ensure that all children and young adults have access to mental health support after the 2020 C19 lockdowns. They may smile on the outside, but so many more than we realise are struggling on the inside too with all the change, uncertainty and lost rites of passage at school.

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

OMG, I couldn't do all that... could I?!

What is number 1 on your bucket list?

To see Andre Rieu and his orchestra in concert in Maastricht.

What 3 things would you take to a desert island?

Swiss army knife, a lighter and a family photo.

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

I love playing outlandish characters in our local am dram and make lots of character costumes on my sewing machine!

Who would you most like to ask these questions of?

Dame Judi Dench.

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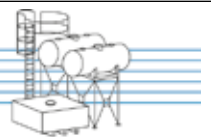
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