

Fuel Oil News

FEBRUARY 2020



TANKERS 2020

TOP 20 UK MAINLAND FUEL DISTRIBUTORS

TRANSPORT MANAGEMENT



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Vested interests, divided opinions

Whilst the UK and Ireland's weather remains relatively warm this winter, Davos had some frosty moments.

Mindful of the carbon footprint created by delegates departing the World Economic Forum, Jet Aviation and World Fuel Services made sustainable aviation fuel (SAF) available; SAF can reputedly reduce a flight's emissions by 80%.

Addressing industry leaders last month Tim Eggar, chairman of the UK's Oil & Gas Authority, said: "Growing public awareness about climate change is putting the sector's very survival at stake".

Stressing the urgency to 'act much, much faster and go farther in reducing their carbon footprint' the industry will need to keep pace with the European parliament's vote for a 55% emissions reduction by 2030.

On 11th February, OFTEC will be attending the All-Party Parliamentary Group's Winter Reception for Renewable and Sustainable Energy at Westminster. Offering 'an ideal opportunity to present our vision for a sustainable low carbon liquid fuel to new parliamentarians with an interest in heat policy', the industry hopes government is perhaps warming more to liquid biofuels....

Making the most of opportunities, a copy of the recently published *Industrial*

Strategy For Decarbonising Homes will be sent to all rural MPs, many being newly elected.

Next month OFTEC and strategic partners will be manning the Future Installer Zone at Futurebuild which takes place at London's ExCel on 3rd-5th March.

Meanwhile in Washington DC, a Business Aviation Global Sustainability Summit will be helping to accelerate the use of SAF.

Acknowledging there is 'certainly a role for synthetic fuels in energy intensive industries and aviation', Julia Poliscanova, director for clean vehicles and e-mobility says this role is 'limited and a dangerous distraction'.

Donald Trump, who approved a right-of-way allowing the Keystone XL oil sands pipeline to be built across U.S. land, no doubt disagrees.

With so much still to resolve to reach a consensus on the way forward, all those with a vested interest still have much to play for. In the opinion of François-Régis Mouton, director of EU affairs at the International Oil & Gas Association the feeling is:

'At the end of the day the industry will demonstrate why we are still a big part of the solution and credible partners in the transition.'

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

Taking the 2019 title of Fuel Oil News Tanker of the Year, Hylands Fuels was 'delighted and very proud' see page 15.

Fuel Oil News now welcomes your nominations for the 2020 title. For news from the tanker market see the 2020 Tanker Review.

In this issue

This month Inside Out looks at the role played by public oil storage.

Investigating the changes in ownership, the key players, the facilities and the outlook for this sector.

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News in brief

◆ Recently undertaking the largest IPO in history, **Saudi Aramco** ‘has caused a stir’, says a Brand Finance media release. Entering the ranking for the first time, Saudi Aramco is the second most valuable oil and gas brand in the world. With a brand value of US\$46.8 billion, the oil giant is only a fraction behind long-standing leader **Shell**.

◆ **Rotterdam** is exploring the potential of becoming a major hub for the production, uptake and trading of hydrogen. Large-scale production and utilisation of blue hydrogen will allow Rotterdam’s local industry to substantially reduce its CO2 emissions before 2030. The **H-vision project** is focused on the production of hydrogen using natural gas and refinery fuel gas. CO2 released during production will be captured and stored in depleted gas fields under the North Sea with the blue hydrogen obtained used as a low-carbon energy carrier in industrial processes.

◆ The Energy Industries Council (EIC) has published a report entitled **Survive and Thrive 2019 Insights** which shows businesses are adopting alternative growth strategies such as innovation, digital and diversification rather than investing in new markets. 64% of companies surveyed cited technology and digital as their most used strategy for survival.

◆ A group of 10 organisations is calling for internal combustion engine vehicles to be banned from city centres by 2030. The ban is just one of 12 measures which the **Climate Emergency Response Group**, which includes WWF Scotland, the Energy Saving Trust, Scottish Land and Estates and the University of Edinburgh, wants the Scottish government to consider.

◆ Aiming to become **Britain’s first car free city**, the City of York’s council has approved plans to ban private car journeys from its centre by 2023.

◆ **Circle K**, Ireland’s largest fuel and convenience retailer, has installed an IONITY high-powered charging station at Cashel in Tipperary with four more charging stations due to be introduced over the next few months. “Through our

exclusive partnership with IONITY, we are very proud to be able to offer Irish motorists exceptionally fast EV charging facilities,” commented incoming Circle K Ireland managing director, Gordon Lawlor. (Look out for more news from Circle K in the March issue.)

◆ **Amnesty International’s Ambassador of Conscience Award for 2019** has been awarded to climate change activist, Greta Thunberg and the Fridays for Future movement of school children. The awards ceremony took place in Washington D.C. as further events were held in cities around the world.

◆ According to a recent BBC report, the levels of **sulphur hexafluoride (SF6)** gas in the atmosphere are increasing as a result of clean energy technologies becoming increasingly widespread. Commonly used as an electric insulator, SF6 prevents short circuits, fires and electrical accidents across the sector. Reputedly the most potent greenhouse gas, SF6 leaks across the UK and the rest of the EU in 2017 could cause additional warming equivalent to that produced by 1.3 million cars.

◆ **JP Morgan** has upgraded its outlook for Europe’s top oil and gas companies, saying that in recent years Royal Dutch Shell, BP and Total have begun adapting to reduced oil demand by cutting costs and lowering emissions from their operations.

◆ **OFTEC** has been in contact with BEIS and is compiling a submission to bid for innovation funding to assist with a large-scale field trial of B30k. The ambitious project will involve up to 150 homes, spread across five sites in the UK and Republic of Ireland.

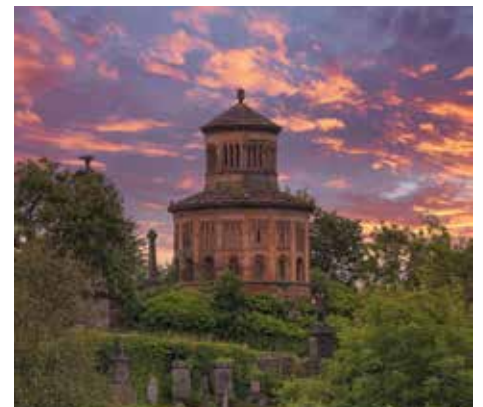
◆ A **Worcester Bosch** survey has revealed that half the nation has never asked for a boiler’s service history when moving into a new house, with 18% believing servicing is unnecessary until a boiler breaks down. Over a tenth of the population have never had their boiler serviced, and a further 20% haven’t had their boiler serviced for over 12 months. Over a third of millennials would wait for their boiler to break down

before servicing it. Interestingly, almost three quarters of Northern Ireland’s population knew their warranty would be voided without regular servicing and, compared to Londoners, double the population in the North East have had their boiler serviced in the past six months.

◆ Researchers at Queen’s University Belfast have discovered new ways to convert single-use plastic waste into products such as **storage tanks for fuel** and water. Funded by Innovate UK through its Plastics Innovation: Towards Zero Waste Programme, the researchers are working in collaboration with three industrial partners including **Harlequin Plastics** in Northern Ireland. The £500,000 Rotocycle project began in January 2019 and will last for two years.

◆ **A Future Homes Standard consultation – building regulations for new dwellings in England**, which closed last month, sets out plans which include proposed options to increase energy efficiency requirements for new homes in 2020. The standard will require new-build homes to be future-proofed with low carbon heating and world-leading levels of energy efficiency; it will be introduced by 2025.

◆ Pictured below, **Glasgow** will host the UN climate change summit in November 2020. Up to 30,000 delegates are expected to attend COP26 which takes place at the Scottish Events Campus (SEC). Partnering with Italy, which will host preparatory events including a youth event, the UK is hosting the main COP summit. SEC will also be the venue for the UKIFDA EXPO in 2021 and 2022.



PEOPLE MOVES

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- **David Hatherell** has been appointed as general manager of **Mabanaft's Truck Stops division**.
- **Lindsay Austin** has been appointed as managing director of **The Bayford Group** which marks its centenary this year. Taking over from Liz Slater, Lindsay is responsible for overseeing Bayford's four divisions comprising energy, property, hospitality and a charitable foundation. Most recently the Group launched Gulf Gas and Power in the UK and Holland to take advantage of the increasing electrification of transport and heating; more details in the March issue.
- Following a review of the strategic direction of its business **Thomas Silvey** will now focus on fleet solutions. The change sees **Miriam James** appointed as managing director of the business. Joining the company 10 years ago, under Miriam's direction the Silvey fleet business has developed into one of the largest resellers of fuel cards in the UK.
- Joining a 17-strong policy team, **Zoe McLernon** has taken on the newly created role of multimodal policy manager at the **Freight Transport Association**. See page 12 for a report from the FTA's Transport Manager seminar in Manchester.
- **Graham Wilson**, a qualified chartered surveyor, has joined the **Motor Fuel Group** as MFG's new property director.
- New marketing managers – **Alex Loveless** and **Jessica Russell** – have joined **The Suttons Group** working within the International and UK Tanker divisions respectively.
- **Nunzia Florio** is now communications specialist at the **Tank Storage Association**.



Liz Slater and Lindsay Austin



Zoe McLernon



Jessica Russell and Alex Loveless

Young employee of the year

Morris Lubricants' Owen Lloyd took the title of United Kingdom Lubricants Association (UKLA) Young Employee of the Year.

Last year 27-year old Owen was promoted to group purchasing manager for both Shrewsbury-based Morris and its Gateshead sister company, GB Lubricants.

In 2016 Owen joined the company's new graduate recruitment programme, spending a year working in different departments to gain a greater understanding of the company and how the business operates in home and international markets. Owen is now responsible for buying all the company's raw materials from around the globe.

"Passionate about our industry, I believe that Owen is not only a key member of our team but will also be influential in leading our business and overcoming the future challenges," said managing director, Chris Slezakowski.



Owen Lloyd, the first Morris Lubricants' employee to win a UKLA award for 19 years (centre) receiving his award from UKLA president David Hopkinson (l) watched by David Wright, UKLA director general

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A more sustainable ship

The CLH Group has a new-generation tanker ship – the Castillo de Arteaga. With a capacity of 42,275 cubic metres distributed in 16 tanks segregated for loading/unloading to a manifold, this double hull vessel can reach a maximum speed of 14 knots.

Built in 2019, the new tanker incorporates the latest technologies to reduce SOx and NOx emissions by using a hybrid scrubber, in addition to a ballast water treatment system certified by the International Maritime Organisation and the United States Coast Guard.

The new ship, which is owned by Naviera Elcano and operated under a time charter agreement, will strengthen CLH's fuel transportation services and improve supply to its facilities.

CLH Group now has two tankers to perform fuel movements that cannot be carried out through the pipeline network. In 2018, a total of 2.9 million tonnes of fuel was transported by tanker ship.



The Castillo de Arteaga is fitted with the latest technologies including a hybrid scrubber

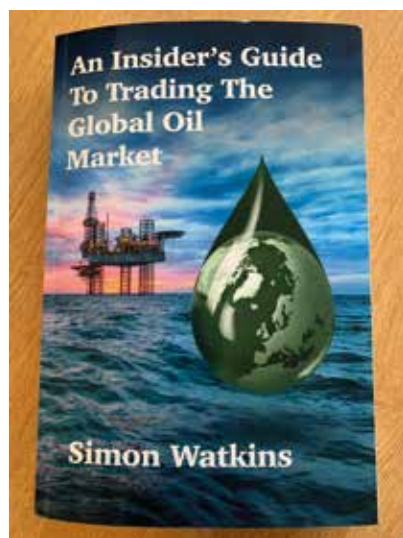
Oil market nirvana

The oil market is so important to virtually all of the world's economies that it is subject to macroeconomic and political factors to a much greater degree than other markets. It is also the focus of a huge degree of manipulation by the key players says Simon Watkins author of **The Insider's Guide to Trading the Global Oil Market**.

With traders in mind, the premise of this book is that *'once all the macro elements involved are understood and the agendas of the principle agents are recognised, it is relatively simple to ascertain the future direction of the oil market'*.

"If the intricacies are understood, the oil market is a trader's nirvana; it offers far and away the most opportunities out of any other market for high returns," reports Simon.

Having worked for many years as a senior Forex trader, Simon is now a consultant to a number of the world's biggest hedge funds.



Fuelsoft – ISO certification

After an extensive auditing process and plenty of hard work from the whole team, Fuelsoft is delighted to announce that the company is now ISO 9001 and ISO 27001 certified!



Protecting and supporting customers at Fuelsoft

Perhaps the best known of the International Standard Organisation's (ISO) 9000 series, **ISO 9001** focuses on quality management systems with the aim of standardisation, meaning that products & services received from an ISO 9001 company will not only be inspected to a high standard, they will also be guaranteed to perform as expected.

ISO 27001, which is perhaps less well-known outside the IT industry, is also an internationally recognised standard with its focus on world class information security management systems.

With the risk of cyber threats, ransomware attacks and data breaches on the rise, Fuelsoft has invested in robust business continuity processes and procedures to ensure cloud and managed platforms remain protected from such threats, which in turn protects customers.

"The two ISO accreditations distinguish us from other companies and have provided us with the tools to monitor and identify areas for improvement in our own processes," commented David Kingsman, Fuelsoft's managing director.

"Taking the initiative with these processes relieves our cloud and managed services customers from the burden and expense of running internally managed hardware systems.

"The processes and procedures used to operate our business, mean we not only protect our customers' data, which is critical to their success, but also our customers' reputation in being able to deliver a quality, reliable and secure service," added David.



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PORTLAND MARKET REPORT

“A RECIPE FOR DROOPING
OIL PRICES”

February update

A new year in a new decade and time for some oily predictions from Portland Towers! Last year when we wrote our start of year report, oil prices were at \$50 per barrel and we predicted that as long as President Trump didn't do anything too crazy, prices in 2019 would increase to a range of \$65 - \$75 per barrel. Well, there was certainly plenty of craziness from the orange-faced one, but prices did indeed sit in our predicted range for much of the year. The average for the 12 months was actually \$64.23 (largely the result of the low starting price in January), with prices peaking at \$75 per barrel in May. In the second half of the year, prices did steady and start to fall, so that by December, the oil price stood at \$67 per barrel. 98 working days in 2019 saw a price between \$65 to \$75 and 178 working days (70% of the year) experienced prices somewhere between \$60 - \$70. So, if anything, we were a tad bullish in our range prediction (to the tune of around \$5/barrel), but as predictions go, we think we didn't do too badly...

What does stand out from 2019, is how significant levels of tension in the Middle East had so little impact on oil prices. In any year up to the present day, missile attacks on Saudi oil facilities, the seizure of oil tankers in the Straits of Hormuz and targeted killings of Iranian officials by American forces, would have sent prices sky rocketing. Not so in 2019, and whilst these events did have immediate effects (the Abqaiq-Khuras Saudi drone attack pushed prices up \$5 a barrel overnight), price movements were short-lived and oil prices soon settled back to “normal” levels. Which mainly tells us that the underlying oil market is a bearish one and Portland sees this bearish trend as one that will continue throughout 2020.

The main reason behind this view is that most economists seem to agree that some form of economic slowdown is inevitable in 2020 and this will bring a slowing down of demand (a trend already evidenced in Q4 of 2019). It is also difficult to see how any thawing of US-China trade relations will

sufficiently lift the economy to accelerate oil demand growth back to the levels of 2016-18. On the production side, the US shale oil industry is pumping more and more oil (up 10% on 2018 volumes), making the US now easily the biggest oil producer in the world (a whopping 13m bpd versus 10m bpd for Saudi Arabia and Russia). With export facilities in the Gulf of Mexico finally coming into play, that excess oil is now finding its way to global markets, just as demand looks to be tailing off. Put the two together and you have a recipe for drooping oil prices.

“SOME FORM OF ECONOMIC SLOWDOWN IS INEVITABLE IN 2020”

Such a scenario puts very significant pressure on our friends at OPEC, as they rein in their own production, and try and drive prices back up. For the last three years, they have shown uncharacteristic discipline in maintaining agreed production cuts and indeed, in December of last year, further production cuts were signed off. But it is beginning to feel now that OPEC is swimming against the tide, with more and more of their Member states (and “guest” nation Russia) bitterly complaining about production caps, as they see shale oil simply gobbling up the market gaps that appear when OPEC pulls back. It is also worth pointing out that the production cap regime introduced by OPEC at the end of 2016 was supposed to be a temporary 6-month measure (to “support the market”), but has now gone on for more than three years...

So, we have a global economy possibly heading for skid row, the US shale oil industry going absolutely fracking crazy and the operational unity of OPEC beginning to crack – prices are only going one way surely? That would certainly seem to be the logical conclusion, but each one of the

aforementioned bearish factors can easily be deconstructed. Number one; a concerted effort by Trump and Xi Jinping could easily set the global economy back into a mega growth phase. And remember, neither of these two Presidents play by any rules, other than their own. Two; the Saudis have just started the process of floating their most precious asset (Saudi Aramco) and a prolonged drop in prices would be disastrous for long-term Saudi prosperity. So, expect them to do whatever it takes to maintain OPEC unity and continue to drive for production cuts. Finally, factor number three; it's not even a well-kept secret, that most US shale oilers are not only massively in debt, but they haven't made any money for the last three years. A drop in price will scatter investors and send them in search of considerably safer bets than shale oil. In turn, this will put most of the smaller, marginal producers out of business and the whole sector could easily wrap-down, just as quickly as it racked-up in the last decade.

Those are three entirely credible scenarios, which can be layered on top any number of bullish scenarios around tension in the Middle East, regime change in Venezuela and the rapid decline of conventional (non-shale) oil exploration projects. Which means that whilst a bearish year is the most likely outcome for 2020 (with prices slowly ticking down), we also fully expect to see some major price spikes in the 12 months ahead, as geopolitics and economics frequently boil over. Depending on when those spikes occur, the price of oil this time next year could easily be back up to the \$80 mark - but for the average of the year, we expect a price of around \$55 - \$60 per barrel.

For more pricing
information, see
page 22

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

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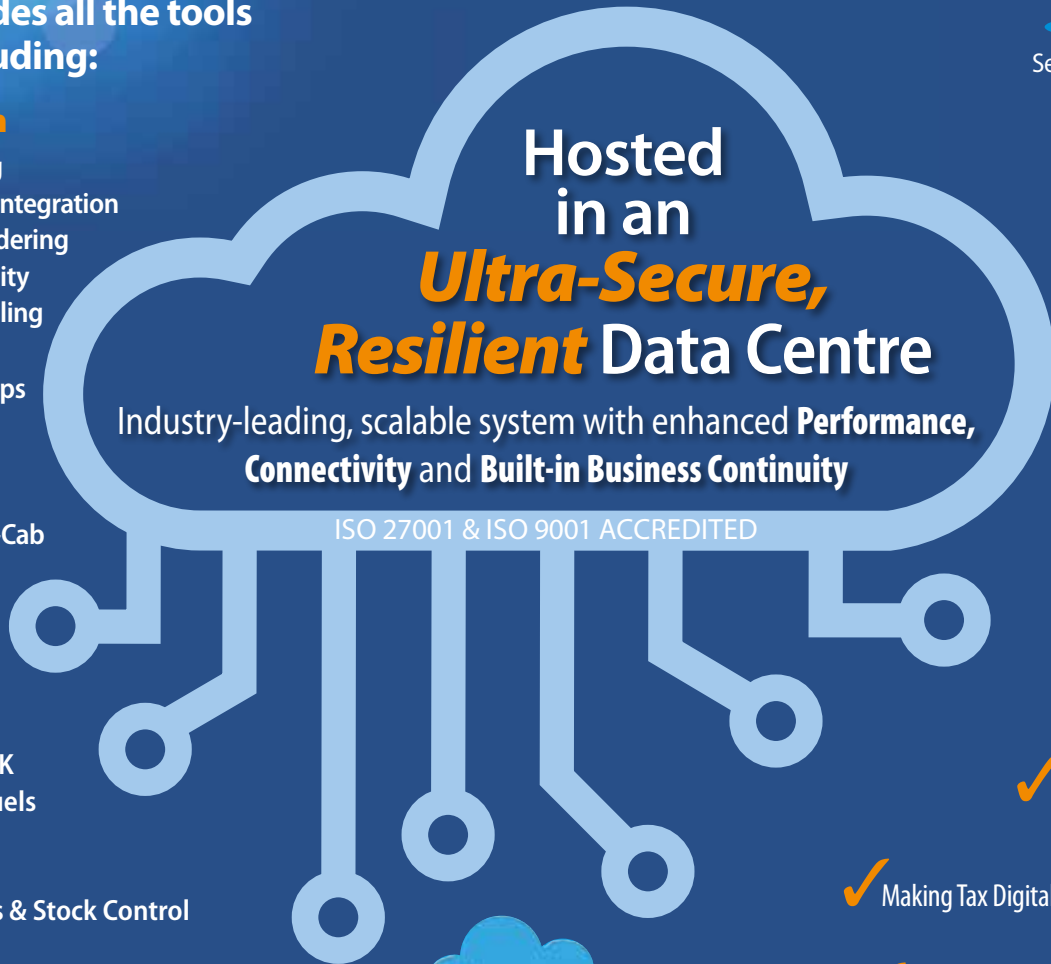
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TOP 20

FUEL OIL DISTRIBUTORS: UK MAINLAND

2020	2019	Company	Number of tankers
1	1	Certas Energy	900
2	2	WFL (UK)*	321
3	4	NWF Fuels	155
4	5	Rix Petroleum	114
5	3	Goff Petroleum**	104
6	8	Oil NRG	88
7	6	Johnston Oils	87
8	7	WCF Fuels	72
9	9	Ford Fuel Oils	65
10	10	Crown Oil	58
=11	17	Oilfast	50
=11	11	WP Group	50
13	12	Mitchell & Webber	48
=14	14	Gleaner Oils	44
=14	13	Highland Fuels	44
16	19	Barton Petroleum	43
17	16	Carrs Billington	42
=18	18	Heltor	39
=18	=14	Oil4Wales***	39
20	20	Fuel Oil Holdings	28

Distributors are ranked by number of tankers supplied to Fuel Oil News in January 2020.

* WFL (UK) – having partnered with Wincanton on its articulated fleet, the inhouse tanker fleet has reduced.

** Goff Petroleum – 2019 figure

*** Oil4Wales – recent acquisitions and the merger of Powys/Brecon depots has improved fleet logistics reducing vehicle numbers

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Daniel Stockley, daniel.stockley@aon.co.uk, t +44 (0) 161 687 2306

Ensuring continuous and effective transport management

FUEL OIL NEWS ATTENDED A FREIGHT TRANSPORT ASSOCIATION (FTA) TRANSPORT MANAGER SEMINAR AT THE ETIHAD STADIUM IN MANCHESTER. DESIGNED TO EQUIP TRANSPORT MANAGERS WITH KNOWLEDGE AND TOOLS FOR THE COMING YEAR, THIS EVENT, WHICH WAS ONE OF MANY AROUND THE UK AND IRELAND, ATTRACTED A VERY HIGH ATTENDANCE

Key dates

October 2019 – drug-drive limits and a zero-tolerance approach to the eight drugs most associated with illegal use, including cannabis, heroin and cocaine

January 2020 – revision of financial standing rates

Early 2020 – consultation on 10-year tyre ban

April 2020 – agency workers regulations to prevent businesses abusing under the derogation – opt out banned

May 2020 – changes to Driver CPC

October 2020

- London Direct Vision
- Euro 6 needed for all HGVs in Greater London lower emission zone
- Pavement parking and double parking banned in Scotland

2020 Introduction of Clean Air Zones

2021

- Van Vehicle Excise Duty to encourage more efficient vehicles
- EU Mobility Package

Transport manager – a vital role

Simon Evans, traffic commissioner for the north west of England is ‘*horrified*’ when he sees some payment rates for transport managers which ‘*do not reflect the importance of the role*’.

Standards continue to improve at the top of the logistics ladder, and although the middle tier try their best, some ‘*still fall off the path of righteousness*’. Highlighting 7 key acts and omissions which create an environment where things go wrong, Simon referred to not learning from previous mistakes, making assumptions without evidence, mistaking experience for expertise, confusing the pursuit of activity with achievement, squeezing profit, forgetting

the basics and not passing on responsibility effectively.

With the non-compliant posing a high risk, a traffic commissioner’s focus is firmly on keeping vagabonds and villains out.

Key concerns and hot topics

Among Simon’s particular concerns – **brake testing, bridge strikes and driver distractions.**

On the essential subject of brake testing and maintenance, it was pointed out that operators are often misled by tests and do not understand the results.

Bridge strikes – 90% of those affected are railway bridges with an average of four hits per day. Over a year the number of strikes rises to 2000, each costing around £13,500.

‘*Please don’t try a bridge for size*’ – know your height before your journey and ensure that someone in your business is responsible for bridge details on all routes and keep a checklist.”

<https://www.networkrail.co.uk/communities/safety-in-the-community/railway-safety-campaigns/wise-up-size-up/>

Driver distractions – how are your reactions affected?

Research conducted by Southampton University revealed the following:

- 13%** on the drink drive limit
- 21%** when high on cannabis
- 27%** on a hands-free phone
- 37%** when texting
- 46%** on hand-held phone

Enforcement updates

Laura Great-Rex, head of enforcement delivery at DVSA, is hopeful that 10% of the UK’s fleet will have Earned Recognition status by the end of the financial year. DVSA’s aim is to help more logistics companies to achieve this status.

With over 500 vehicles found to have manipulated control systems, more action is being taken with respect to emissions enforcement and load security. The DfT is working on testing equipment to detect

modified or illegal systems, particularly those on new vehicles.

Vehicle safety recalls – fleets should regularly check for recalls

<https://www.gov.uk> › **Buy a vehicle: step by step**

Having gone live in February 2019, the ANPR single system (NAS) is being trialed until April 2020. NAS, which connects all UK police forces for law enforcement purposes, enables the results of complex searches to be returned in minutes not hours. With offences more effectively detected, impounding illegally operated vehicles and removing illegal MOT testers becomes easier.

“This system will revolutionise our actions,” said Laura.

“The NAS system has revealed ‘a disturbingly high level of offending by use of a vehicle without an MOT’.

“Getting the non-compliant off the road is the best way to improve our road safety.”

Tyres, brakes and technology

‘*Less than 5% of truck tyres sold in the UK are energy efficient.*’ according to Ian Davis, UK fleet sales manager at Bridgestone.

With more pressure to raise vehicle efficiency, the tread compound of energy efficient tyres offers a reduction in annual fuel costs and greater mileage performance, Ian reported. Adding technology and telematics to a tyre maintenance and monitoring regime can further assist. Good pressure maintenance improves wear life and optimises fuel consumption.

Energy efficient tyres are best suited to long or regional distance operations with a single drop; regional tyres being more appropriate for multi drop.

To protect a fleet’s health, Bridgestone now offers FleetPulse.

Brakes – when in doubt check it out!

Presenting detailed brake test results to

help demystify brake testing, James Firth, FTA's, head of road freight legislation, urged attendees to 'look beyond the overall results' and ask questions; 'the more questions, the more likely testers will test right'.

- **% brake imbalance across an axle?** Could indicate an imminent problem.
- **Low brake readings from all brakes on one side?** Could indicate a problem with the brake machine.
- **All brakes locking at low figures?** May make the brake test meaningless.
- **Test result just above Pass Value?** Further deterioration could result in prohibition action at a DVSA inspection
Electronic brake performance monitoring systems (EBPMS) – measuring the heat of the brakes can be the best monitor.

DVSA enforcement

Officers saw some horrors on the UK's roads in 2019. Highlighting some of the worst offenders, vehicle examiner Gareth Prismick, reflected on the range of offences with which he deals on a regular basis. All have played an active part in removing dangers from our roads.

<https://movingon.blog.gov.uk/2020/01/06/news-years-enforcement-dishonours-list/>

In the last 12 months 38,712 serious defects and traffic offences were found on our roads. Many led to fines, prosecutions, visits to the traffic commissioners and other enforcement action, all of which helped to protect road users from unsafe vehicles and drivers.

Smarter transport

It is estimated that over 70% of road freight will be smart transportation by 2030.

With a focus on trailer technology, Derek Skinner, technical consultant at Schmitz Cargobull, looked at the increasing role of truck technology. As the digital age witnesses an increase in trailer functionality, businesses require data that shows increases in their efficiency and ever higher performance levels.

Backed by remote maintenance assistance, virtual reality service training and proactive monitoring, intelligent networks, live diagnosis, digital temperature control coupled with electric innovation and hybrid technology will produce transport with 100% cooling and 0% omissions.

Electrification is becoming a more interesting prospect for customers, reported Derek.

The company offers anti-theft protection



Pete McNamara and Nicky Jones from NWF's agricultural division who attended FTA'S Transport Manager event at Manchester City's football ground

for valuable fleets, safe operation, modular and flexible solutions with the ability to keep customers updated on delivery progress.

Vehicle terrorism threat and safety advice – pursue, prevent, protect, prepare

Vehicles used as a weapon have been involved in attacks in London, Nice, Berlin and Stockholm.

"The UK must be as strong as possible," said Scott Gibbons from the national vehicle threat mitigation unit, national counter terrorism policing headquarters.

At the time of the seminar, NaCTSO had 800 live investigations underway in the UK. Twenty-two plans had been stopped, seven of which were extreme right wing; an area which has seen offences rise by 18%. A total of 273 arrests for terrorism had been made.

Hostile vehicle mitigation is now in place such as surface mounted barriers which are not fixed, along with additional traffic exclusions.

At least 2,000 pieces of terrorist propaganda are posted on the internet each week, 315,000 pieces have been removed.

"Having a moat around our island is helpful," said Scott, who added that having established a strong safety culture, the public do not hold back and now contribute around a third of the information relating to any suspicious activity; everywhere, every day, by everybody.

The Counter Terrorism and Border Security Act 2019 Overarching Fact Sheet was issued at the end of 2019.

New government guidance – <https://www.gov.uk/government/publications/counter-terrorism-and-border-security-bill-2018-factsheets>

To reduce criminal activity Scott advised – 'keep your heavy goods vehicles secure and always check to see that vehicles have not been tampered with'.

Clean Air Zones and other air quality issues

Clean Air Zones (CAZs) are 'a constantly changing picture' said Chris Yarsley, FTA's policy manager – Midlands, south west England and Brexit

Nitrogen oxide emissions have fallen 72% since 1970 and a further 27% since 2010.

The government's aim is to further reduce these emissions by 55% from the 2005 baseline this year and by 73% by 2030.

London's ULEZ, which was introduced in April 2019, will be further extended on 26th October 2020 and again on 25th October 2021.

With respect to other cities mandated to become CAZs, **Leeds** and **Birmingham** have delayed introduction until at least July 2020. **Glasgow's** LEZ will affect all vehicles from 31st December 2022. **Nottingham, Derby** and **Middlesbrough** have confirmed CAZ plans with **Southampton** opting for a non-charging CAZ.

Greater Manchester and **Sheffield** are expected in January 2021 with **Oxford** looking at no HGVs in a wider green zone by 2022.

Last month FTA commented on plans for **Bath** – A Class C charging CAZ is the worst option for businesses and the regional economy; it will place the heavy financial burden of improving the city's air quality on commercial vehicle operators.

And of **Newcastle** where there is a proposal to close one lane of the Tyne Bridge in each direction, FTA said: It is unfair to expect businesses to bear the cost of cleaning Newcastle's air alone and that closing one lane would simply increase road congestion.

Ahead of **York's** CAZ launch last month, the council awarded more than £1.6 million in funding to five bus companies to help make their vehicles more environmentally-friendly.

Here's to the 2020s

FOLLOWING ON FROM THE *OUTLOOK FOR 2020* COMMENTS PUBLISHED IN JANUARY'S ISSUE, IRISH CORRESPONDENT AINE FAHERTY HAS BEEN IN CONVERSATION WITH IRISH READERS TO FIND OUT HOW FUEL DISTRIBUTORS ARE DEALING WITH THE CHALLENGES



“2020 and the coming years will bring many challenges for the Irish oil distribution industry,” said Alan Keyes **GLEN FUEL SERVICES** Kilmacanogue, Co Wicklow

Current problems with biodiesel in the transport sector must be addressed at importation and governmental level with a pan-industry approach needed to raise awareness of issues. Oil distributors such as ourselves cannot solve the problems on our own.

Nationally, around 750,000 houses are still using oil for heating but within a very short timeframe, the plan is to switch all households to alternative energies such as heat pumps. A move which is being encouraged by incrementally increasing the carbon tax over the next few years.

With Glenergy, our sister company supplying and installing heat pumps, we would do well out of this migration, however, upgrading to a heat pump only works if the house is properly insulated and most are not!

Due to the massive spend required by the householder in order to get the appropriate grant, we feel that little or nothing will actually happen. Our proposed solution is a condensing kerosene boiler, a couple of PV panels and a hot water heat pump. Whilst this will not

eradicate all CO2 emissions, it does offer a significant reduction in current emissions. With less disruption to the householder and a much more affordable price, this option is far more likely to succeed.

Migrating all diesel and petrol cars to EV is simply not feasible – the grid is not in a position to power these vehicles. An enormous capital infrastructure spend would be required to facilitate such a network, especially when rapid growth in the data centre industry is taking a massive chunk of power generation.

We believe the Irish market's consolidation will continue; meanwhile we will continue to embrace technology advances in this fast-moving industry. No day is ever the same and I guess that's a large part of why we're all still doing it – here's to the 2020s!”

“**VALERO** is very optimistic for the year ahead,” reported Paul Leahy, manager direct business, Valero Marketing Ireland.

We have a further upgrade to our delivery fleet scheduled and will be investing in our storage locations to ensure they maintain the highest levels of safety and are modern and fit to service our growing operations.

The industry remains challenged though

due to margin pressure, increasing legislative requirements and growing environmental fears that are leading to a disproportionate perception of the oil industry and its role in the future.

Nonetheless, we are committed to supporting Irish households and businesses with the supply of quality product, particularly to those located in more rural locations where energy supply choices are limited.

It is our intention to grow our business further in the year ahead and to make the Texoil brand more widely available in the market.”

“As a new decade begins, **HYLANDS FUELS** looks forward to the challenges ahead,” commented Paul Hylands, Hylands Fuels, Belfast.

As Brexit will now definitely happen in some shape or form, this may at least give a little more certainty to businesses and consumers in Northern Ireland...

So far 2019-2020 has seen milder temperatures, and by all accounts, media reports point to global warming gathering pace. We must prepare for potentially shorter peak seasons, particularly as operational costs do not change throughout the year.

Over the course of 2020, Hylands Fuels will continue to strive to move forward whilst continuing to offer the best possible service to all its customers in what is an ever-changing market.”

Given oil's large market share – 65% in Northern Ireland (c.500,000) homes and 40% in the Republic (c.700,000) – David Blevings, spokesperson for the **NORTHERN IRELAND OIL FEDERATION (NIOF)** still strongly advocates that due to the majority of these homes having low thermal efficiency, a sustainable low carbon liquid biofuel (kerosene blended with FAME) has the potential to deliver the highest carbon reduction impact of any off-grid heating technology for the lowest overall cost over the lifetime of the appliance.

“That is the position NIOF and OFTEC are putting to governments both north and south, as a potential solution in the reduction of our carbon emissions – watch this space and the March issue for more comment.

No sign of a slowdown in a buoyant market

WITH A NEW DECADE IN FRONT OF FUEL TANKER MANUFACTURERS, THERE ARE PRESENTLY NO SIGNS OF A SLOWDOWN ACCORDING TO THOSE WHO RESPONDED TO A REQUEST FOR THEIR VIEWS ON THE MARKET.

RECENT INVESTMENTS AND EXPANSION ARE PAYING DIVIDENDS WITH SEVERAL MANUFACTURERS NOW OFFERING ADDITIONAL SERVICES TO FUEL OIL DISTRIBUTORS WHO CAN ALSO LOOK FORWARD TO NEW TRUCK RANGES FROM VEHICLE MANUFACTURERS.

BUSY LAST YEAR, THE MOOD IS POSITIVE AND UPBEAT IN THE MAIN, ESPECIALLY WITH MANY HAVING FULL ORDER BOOKS FOR 2020. THERE WAS JUST A WORD OF CAUTION ON RISING PRICES FOR ALUMINIUM, PAINT AND OTHER CONSUMABLES.

“Delighted and very proud”

Hylands Fuels Northern Ireland is ‘*delighted and very proud*’ to have been awarded the title of *Fuel Oil News 2019 Tanker of the Year*.

“Firstly, we must thank Trevor Wilson, managing director of Road Tankers Armagh, and all his staff including Mark Skelton, for the superb build quality of this DAF-manufactured 12,500 litre four compartment aluminium vessel, supplied by TBF Thompson,” commented Hylands Fuels director, Paul Hylands.

“This award is testament to Road Tankers Armagh’s high workmanship standards and quality. The company carried out this high-end build and sign writing in a very professional and prompt manner.

“This award-winning tanker joined our fleet of tankers in supplying kerosene, gas oil and derv to customers in Greater Belfast and the surrounding areas.

“Like all our fleet, the new vehicle is fully equipped with Alpeco metering equipment. Although this tanker has been in operation for several months, this is its first full winter. To date, we’ve been exceptionally pleased with its performance when delivering to domestic and commercial customers in both urban and rural areas,” added Paul.



Undertaking its first full winter, the company is ‘*exceptionally pleased*’ with the performance of this winning tanker

Founded in 1966, Hylands Fuels has been supplying customers for over 50 years, celebrating its landmark anniversary in 2016.

“This is a very special award of which everyone at Hylands Fuels is particularly proud.

“Having entered another new decade, we expect this winning vehicle will continue to provide both existing and new customers with many more years of service.”

“This was the very first tanker build that Road Tankers Armagh had carried out for Hylands Fuels,” explained managing director, Trevor Wilson.

“We could not be more delighted with this tanker’s success and we would like to thank Hylands Fuels for its continued custom.”

Who will take the 2020 title of *Fuel Oil News Tanker of the Year*?

Fuel Oil News welcomes your nominations for the 2020 tanker of the year award.

To enter simply email a high resolution image of your new tanker together with full details of the vehicle’s chassis/tanker manufacturer, type, size, capacity, compartments and on board equipment, paying particular attention to anything that is new, innovative or different to other vehicles in your fleet.

Entries for the 2020 award will be accepted up to **31st October 2020**.

Road Tankers Armagh – ‘happy’

“Having entered a new decade there seems to be no slowdown when it comes to the industry’s need for new tankers,” reports RTA’s general manager, Mark Skelton.

“We couldn’t be happier with the additional capacity at our new premises which has enabled us to increase production, reduce lead times, and more importantly fulfil our customers’ needs.

“We’ve also been able to increase the stock holding of genuine original manufactured spare parts. Ready for immediate next-day dispatch from our parts department, Road Tankers Armagh has a full-time sales representative for parts to service new and existing customers across Ireland.

“We recently delivered a 20,000 litre, 5 compartment BLVR aluminium, 6-wheel road tanker to Scott Fuels Equipped with a full Emco Wheaton package and built to ADR standard, the tanker is finished in Scott’s eye-catching livery

“2019 was a very busy year, and now with an ever-filling order book, it certainly pays to get tanker orders in early. The days of ordering a chassis and getting it built in the same year are proving to be more and more difficult.”



Having been the manufacturer of the Fuel Oil News tanker of the year in 2019, Road Tankers Armagh may be looking to repeat it’s 2019 success with this eye-catching build for Northern Ireland-based Scotts Fuels

Cobo Tankers and Services – ‘success’



Sweeney Oil – ‘a small company with a wealth of experience’ Headed by John Sweeney, the company chose a Cobo Tankers and Services build for this new tanker

“2019 was a good year for Cobo, not only did the company remain strong in its staple semi-trailer market, we also enjoyed great success with rigid tankers,” commented Joby Clark.

“With an incredibly buoyant rigid market, good orders were delivered in 2019 and having been well-received, there is a healthy order book for 2020.

“Our entry into the market saw two trips to Spain for potential UK and Ireland customers.

Looking to form long term partnerships, visitors were able to see the production facility and product quality first-hand, with orders taken following both trips.

“2020 has got off to a great start with new names added to our order book. This is expected to continue over the year as we showcase our Spanish facility to more fuel distributors.

“We will also be developing some new lines of business throughout the year – watch this space!”

Morrow Tanker Services – ‘fabulous’

With production up 20% on the previous year, it's been 'another fabulous year' for Morrow Tanker Services.

"We've invested in computer-aided manufacturing equipment and staff training and are now reaping the rewards," explained Jonny Morrow.

"The order book is filling up fast and it looks like there's another good year ahead. Brexit remains a hot topic, especially as most truck chassis are manufactured or owned by European companies and there's still talk of hefty import tariffs.

"Our customer base continues to grow in all corners of the UK & Ireland; we attribute this to our unrivalled customer focus and flexibility in meeting customers' individual needs. We still stick by our core values and our mantra remains – quality means doing what is right when no-one is looking."



Featuring a Volvo FL 12 tonne chassis and 7,000 litre three compartment tank, this recent Morrow Tanker Services build was for the LCC Group's Go Click Oil.com brand

The RTN Group – ‘exceptional’



NWF Fuels selected The RTN Group for this very smart new tanker

The RTN Group experienced another exceptional year, especially as investment in a new 25,000 sq.ft trailer manufacturing workshop started to pay dividends with increased trailer production over 2019.

"The workshop has also freed up space for four more rigid bays which will further increase rigid tanker production throughout 2020," explained operations director, Don McKelvie.

"Enquiries have not slowed up, leaving only limited slots on rigids, trailers and LPG available.

"Our dedicated sales team has already taken orders for early 2021 and we are expecting another strong year of continual growth," reported Adrian Mason, retail sales executive.

"The only cloud on the horizon is further rises in manufacturing costs and, as Brexit gets ever closer, the cost of aluminium, paint and other consumables has risen, forcing an increase in prices across the range."

Looking ahead to another busy year Adrian confirmed that Tank Testing UK, the group's testing and inspection arm, has also seen further investment with the addition of a second technician in Scotland. All of which is helping to cement the RTN Group as a true one-stop shop.

Our Humber Refinery's premium coke formulations are already powering electric vehicles

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Tasca Tankers – ‘all-time high’

“As Tasca Tankers turns 25-years old, our production is at an all-time high,” said Ben Firth.

“2019 saw Tasca deliver a record number of new tankers to valued customers old and new, here in the UK & Ireland and further afield, with 2020 shaping up to be even busier again.

“With the quality of build essential at Tasca, we’ve seen our customers order larger numbers of vehicles, in the knowledge that lead times reflect the success we’ve achieved over the last 12-18 months.”



A Tasca Tanker's build for Highland Fuels – 19,000 litre 4 compartment aluminium barrel with Alfons Haar BLVR metering equipment

MAN – ‘exciting’

Following a successful 2019, truck manufacturer MAN Truck & Bus has announced exciting news for 2020 with the launch of its much-anticipated new truck range in February.

“We’re assured that the new range will offer unrivalled levels of both efficiency and connectivity,” said Simon Wood, press and PR manager.

“It will most certainly boast the excellent German-build qualities as seen in the current range and use the latest manufacturing methods and designs.

Following the unveiling, the first public viewing will be at the CV Show which takes place at the NEC, Birmingham, from 28th-30th April.



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Scania – ‘well-received’

Well-received by the petroleum industry, Rix Petroleum’s articulated vehicle offers ‘good fuel consumption and reliability’



Scania’s new generation truck range has been extremely well-received by the petroleum industry, with good fuel consumption and reliability often cited as two key customer-drivers. Driver acceptance is also very good, with the new P-cab capable of achieving two or three stars under Transport for London’s Direct Vision Standard.

Scania is currently in the process of extending its offer so that vehicles built to both ADR FL specification and compliant with the Safe Loading Pass scheme, will be directly available ex-factory.

Scania has 13 fully-equipped Petroleum Regulations workshops across the UK.

With many of today’s operators having requirements that extend beyond vehicle supply and uptime to the provision of complete maintenance packages, Scania’s offering is in demand. The stocking of all-makes parts through Scania’s VRS brand is critical in ensuring third-party components are available at Scania’s workshops nationwide.

Workshop upgrades to make sure they are fully compliant to DSEAR regulations and internal procedural and health & safety requirements are now underway in the Scania network, with a full review and overhaul being undertaken to also encompass CNG and LNG vehicles.

Despite technician training becoming ever more demanding, Scania enjoys good retention rates and also offers training to the relevant legislative parties to help ensure the highest standards are maintained.

Being involved with the Department of Transport and other professional bodies within the tanker industry’ ensures that the Scania network is kept informed on the very latest legislation and compliance issues. The company plays an active part with working groups to assist and advise of the latest truck operating systems and workshop requirements.

Volvo – ‘versatile’

Petrochemical transportation requires maximum safety and payload, whilst responding to a demanding set of operational safety standards. The Volvo range boasts some of the most versatile trucks on the market, from the 10-tonne FL to the 44-tonne FH. With a range of cab styles and high load capabilities, all vehicles can be configured in chassis layouts from a 4x2 to an 8x4. Add to this engine options from 210hp to 750hp, together with the industry leading I-Shift automated or I-Shift dual clutch transmission, and you will find a model to suit every aspect of the tanker market.

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

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



The new FE from Volvo



Public storage – revisited and in fine fettle

JUST OVER 7 YEARS AGO *INSIDE OUT* EXAMINED THE ROLE PLAYED BY PUBLIC STORAGE FACILITIES IN THE DOWNSTREAM INFRASTRUCTURE AND VALUE CHAIN. THIS MONTH WE PAY A TIMELY REVISIT TO REMIND OURSELVES OF THIS SECTOR'S KEY CONTRIBUTION AND TO SEE WHAT CHANGES HAVE OCCURRED IN ITS COMPETITIVE LANDSCAPE

Four key functions

- ✓ Enhances downstream supply security and continuity, supplementing and complementing existing oil industry owned facilities, and acts as a key link in international oil products trade and entrepot movements – a significant factor in a backdrop of increasing deficits of diesel and Jet A-1
- ✓ Enables ready market access to non-refining companies e.g. traders and importers/wholesalers thereby supporting a competitive environment by lowering entry barriers
- ✓ Provides an important source of physical storage to help meet more demanding CSO requirements
- ✓ Has played/is playing a lead role in the development and provision of facilities to accommodate non-conventional fuels, such as biofuels and e-fuels

Utilisation rates continue to run at healthy levels, often over 90%, and this has encouraged substantial investments in both upgrading and expansion of facilities at major European hub locations such as Antwerp and Rotterdam.

Changes in ownership

A couple of significant changes in facility ownership have taken place in recent years.



2016 – Navigator Terminals

was formed as a joint enterprise between Macquarie Capital of Australia and Greenergy, which acquired Vopak's interests

2015/2018 – Inter Terminals, a subsidiary of Canada-based Inter Pipeline, which undertakes oil transportation, storage and operates a natural gas processing company, integrated the Simon Storage interests into its operation and acquired NuStar Energy and its European subsidiary, NuStar Europe in 2018

In terms of facility numbers and total storage capacity, Navigator Terminals and Inter Terminals are the dominant players, with Inter Terminals not only being the largest UK operator, the company also occupies the 5th position across Europe. A further three companies – **Oikos Storage, ASCO and Stolt-Nielsen** – make up the UK mainland's public storage sector as a whole.

Players, facilities and capacities – UK

Inter Terminals owns/operates 9 facilities with a total storage capacity of 1.87 million cubic metres – Tyneside, Seal Sands (Teesside), Immingham,

Billingham, Eastham, Belfast, Grays (Thames), Grangemouth and Clydebank.

Navigator Terminals owns/operates three oil facilities with a total storage capacity of 1.24 million cubic metres – North Tees, Seal Sands and Grays as well as a 42,000 cubic metre chemicals facility in Cardiff.

Oikos Storage owns/operates a 300,000 cubic metre facility on Canvey Island, Essex, providing ingress to both the CLH and UKOP pipeline networks/systems.

ASCO owns/operates three facilities with a total storage capacity of 73,000 cubic metres – Aberdeen, Peterhead and Great Yarmouth which are part of larger North Sea supply bases servicing the offshore oil/gas sector, accommodating high flash products only.

Stolt-Nielsen owns/operates a 162,000 cubic metre at Dagenham, Essex, known as Stolthaven.



OIKOS Storage

Players, facilities and capacities – Republic of Ireland

There are two public storage facilities in the Republic of Ireland both located at Foynes in Co Limerick

The Atlantic Fuel Supply Company which was commissioned just over 10 years ago, has a capacity of 81,000 cubic metres and is jointly owned by East Cork Oil and Greenergy.

Inter Terminals' Shannon facility has a capacity of 14,325 cubic metres.

What is the outlook for public storage?

In the near term over the next 10 years at least, public storage facilities will continue to play a critical role.

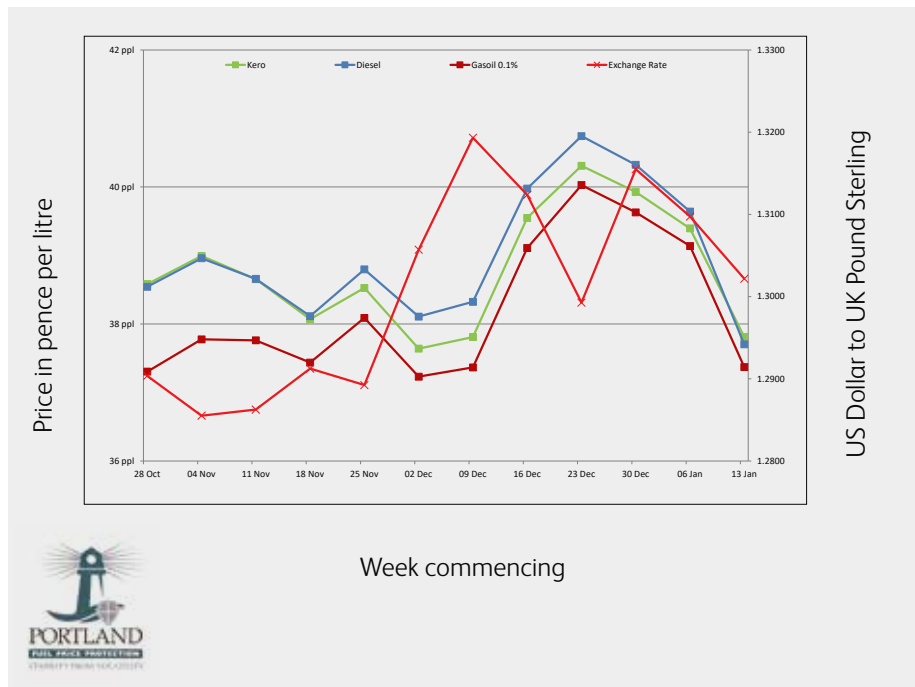
Continuing to play a key part in the downstream oil sector infrastructure and value/supply chain, these facilities will help ensure continuity and security of supply of oil products and liquid substitutes. Beyond that they will no doubt be compelled to find a role in the transition from fossil fuels.

Their understanding of the storage sector and expertise places them in a good position to continue to play a key role both during and post the energy transition.

Wholesale Price Movements: 19th December 2019 – 18th January 2020

	Kerosene	Diesel	Gasoil 0.1%
Average price	39.31	39.54	39.98
Average daily change	0.36	0.38	0.38
Current duty	0.00	57.95	11.14
Total	39.31	97.49	50.12

All prices in pence per litre



Highest price
40.67 ppl
Fri 03 Jan 20

Biggest up day
+1.10 ppl
Fri 03 Jan 20

Kerosene

Lowest price
37.53 ppl
Fri 17 Jan 20

Biggest down day
-0.81 ppl
Tue 31 Dec 19

Highest price
40.99 ppl
Fri 27 Dec 19

Biggest up day
+0.94 ppl
Fri 03 Jan 20

Diesel

Lowest price
37.22 ppl
Fri 17 Jan 20

Biggest down day
-0.98 ppl
Mon 13 Jan 20

Highest price
40.27 ppl
Fri 03 Jan 20

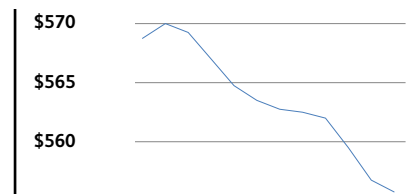
Biggest up day
+1.01 ppl
Fri 03 Jan 20

Gasoil 0.1%

Lowest price
36.85 ppl
Fri 17 Jan 20

Biggest down day
-0.85 ppl
Tue 31 Dec 19

Gasoil forward price
in US\$ per tonne



February 2020 – January 2021

The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Scotland	42.67	54.28	102.04	48.64	58.00	106.04
North East	41.62	52.91	101.12	49.89	56.36	104.05
North West	43.19	55.51	103.51	48.94	58.75	106.14
Midlands	41.69	53.44	101.58	47.28	56.84	104.77
South East	41.79	53.40	101.56	53.33	59.33	104.32
South West	42.14	53.24	101.40	49.60	56.63	103.93
Northern Ireland	42.25	54.61	n/a	47.76	58.79	n/a
Republic of Ireland	56.01	60.04	102.98	61.23	63.59	106.24
Portland	40.00	50.96	98.27			

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>.



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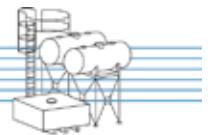


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