

Fuel Oil News

OCTOBER 2019

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PEOPLE MOVES

UKIFDA Q&A





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Making an unprecedented effort

Expressing the volatile nature of the oil industry, September's drone attacks on Saudi Arabian facilities saw the oil price have its 'biggest one-day rise since the 1991 Gulf War' followed by news the next day that prices had been 'pushed back down' with the announcement that Saudi Arabia expected to restore full production soon.

Well-known for its resilience in the face of adversity, the oil world has often proven itself to be a well-oiled machine that quickly resolves issues to ensure the world's wheels continue to turn and fuel the economy.

The battles oil now faces – such as climate change – *the defining issue of our time* – are very different to those of the past when the industry stepped on the gas and produced oil to keep up with world demand. Now that world is changing, the emphasis is firmly on

reducing oil's flow, something that in the words of the UN

secretary-general António Guterres 'will require an unprecedented effort from all sectors of society'.

By the time you are reading this editorial, the UN secretary-general will have had time to ponder on 'the concrete, realistic plans' of the leaders who attended last month's Climate Action Summit in New York, as to how countries are planning to reduce greenhouse gas emissions by 45% over the next decade, and reach net zero emissions by 2050.

Taking place ahead of last month's United Nations Climate Action Summit, the Peoples' Summit on Climate, Rights and Human Survival called for governments and companies to be held accountable for the phasing out of fossil fuels.

On Friday 20th September the global climate strike saw a steadily increasing number of people take action across the UK and beyond, rallying in cities and towns for faster action from our governments and industries.



Ruggedised hand and hearing protection, like the Honeywell designed ones shown on this month's front cover, are a requirement at noisy locations such as this power station, where massive pipes collect and transport steam under high pressure. See page 16.

Fuel Oil News

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

4-5, 7-9 NEWS

UKIFDA and a no deal Brexit; Building new relationships with government; People Moves; Geos Group opportunity; Shipping key to the economy; Heritage Mustang; Hybrid HGVs and greener fleets; using virtual reality in the oil and gas industry

11 PORTLAND MARKET REPORT

'the astonishing growth of renewables – could genuinely be viewed as a 21st century industrial revolution'

13 Q&A WITH UKIFDA

CEO Guy Pulham in conversation

15 IRISH NEWS

Motoring on at Murphy Oils

16 KNOWLEDGE

Honeywell Industrial Safety

17-18 INSIDE OUT

Belgium's downstream oil sector

19, 21 TRADE & TECHNICAL

Taking control – products & services for an easier life – managing fuel quality, deliveries, ordering and using trigger contracts

22 PRICING PAGE

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‘Security of supply will be the key concern’

SPEAKING LAST MONTH WITH GUY PULHAM, UKIFDA'S CEO, FUEL OIL NEWS ASKED:

Should a no-deal Brexit take place; do you feel the industry is well-prepared to cope with the challenges this may bring?



Guy Pulham – in respect of a no-deal Brexit, UKIFDA has ‘asked each member to talk to their suppliers and ask about their contingency plans’

This industry has the skills, knowledge and expertise to cope with most situations. I do have confidence in the supply chain – a supply chain which consistently performs even during the largest peaks of demand.

Writing this in mid-September, the Operation Yellowhammer report has just been released. These papers talk about the worst-case scenarios of a no-deal Brexit leading to fuel shortages, and how smuggling across the Irish border could increase, (we have lobbied on the current smuggling issue).

As a result, we are currently reviewing government plans and continue to work hard to ensure lines of communication are open between all parts of the supply chain – UKPIA and TSA for primary distribution issues – to ensure members are kept fully informed of the situation enabling them to update their customers. Having attended several Brexit meetings in London, we have continually been told that no disruption to imports is expected. The reality may be somewhere between the two.

Our members mainly operate in secondary distribution moving product from primary locations to their own depots and/or onwards to end consumers. Security of supply will be the key concern. That is why we’ve asked each member to talk to their suppliers and ask about their contingency plans. We would also encourage members with depots to have a little more stock than usual in tank at the end of the October.

The second stage of our ‘Get Winter Ready’ campaign will also be sent out in October – it will use Brexit as an extra reason to buy early this year. The balance is trying to get consumers to have a little more stock in tank through the end of October without causing unnecessary panic buying and thereby causing supply issues.

TURN TO PAGE 13 FOR A FURTHER Q&A WITH GUY PULHAM

OFTEC – building new relationships with government

Letters regarding the importance of bioliquids to be included as an option in the home energy mix have been dispatched by OFTEC.

Replies have been received from both the new minister of state for business, energy and clean growth, Kwasi Kwarteng, and Andrea Leadsom, under-secretary of state for energy and climate change.

OFTEC was disappointed to learn that Aaron Gould has now left the BEIS Heat Team to take up a new role in the ministry of housing, communities and local government.

OFTEC reports that ‘Aaron was one of the few remaining people within BEIS originally involved in DECC, and who could bring a degree of consistency and history to discussions.’ With his successor yet to be appointed, OFTEC remarks that this ‘creates a degree of uncertainty’.

OFTEC will seek to build a relationship with Aaron’s successor as quickly as possible.



**TANKER OF THE YEAR 2019
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- **Prax** has appointed **David Howells** as the Group's in-house talent engagement manager. With over 20 years' operational experience across multiple industries including oil and trading, David has 'responsibility for the direct sourcing and acquisition of talent, along with providing strategic recruitment solutions as the Group continues its ambitious plans to expand activities', in the UK and internationally. Commenting on David's appointment, CEO Sanjeev Kumar said: 'Our success has been achieved through our entrepreneurial spirit, and the commitment and integrity of our staff. Looking to continue to engage with driven and dynamic individuals, David will now be the first point of call for any enquiry about employment opportunities.'
- On the departure of Marc de Witte, **Ravi Bhatiani** has formally assumed the role of executive director of the Federation of European Tank Storage Associations (**FETSA**). FETSA's new correspondence address is Rue Abbé Cuypers 3, B-1040 Brussels; main telephone number +32 2 741 6833
- **James Wroath** has joined **Wincanton** as chief executive officer 'to continue to build on the firm's strong reputation for delivering market-leading supply chain, transport and storage solutions.' "Wincanton's focus on great people, innovation and operational excellence are critical to the firm's development. I will work closely with the board of directors and the entire team to ensure we continue to deliver great service for our customers as we head towards what I anticipate will be an exciting next phase of growth and development for Wincanton."
- Founded by her grandfather Francis P. Scully, **Katrina Scully Ohl** is now president and CEO of the **Scully Signal Company**. Katrina, who has been instrumental in driving initiatives to invest in new product development and improve operations in recent years, is 'very excited to continue the process we started a few years ago to revitalise our role as the innovative industry leader in fluid handling solutions.'
- Strengthening its management team to support further expansion, the multi-disciplined technology and engineering company, **XL Group** has appointed **Mike Fergusson** as UK sales director with **Richard Dodunski** joining the group as operations director. In addition, 5 new business development roles have been created. The group's integrated engineering offering is spread across eight divisions employing 100 members of staff working across five global locations.
- Arc flash garment supplier, **ProGARM** has appointed **Dietmar Rohrbach** as business development manager in Germany with responsibility to expand into new markets there. The brand, which supplies clothing to contractors across the globe in industries such as petrochemical, utilities and power generation, specialises in garments that help protect against life changing injuries and potential fatal consequences posed by an arc flash – a type of electrical explosion that can be hotter than the sun and louder than a gunshot.
- Formed in April 2019 **Fleetmaxx Solutions**, a wholly-owned subsidiary of Oilfast Ltd, now supplies specialist fleet management advice to businesses nationwide. Heading up the business are **Alan Tait**, **Campbell Brogan** and **Stephen Anderson**.



David Howells



James Wroath



Katrina Scully Ohl



Dietmar Rohrbach



Richard Dodunski (l) and Mike Fergusson



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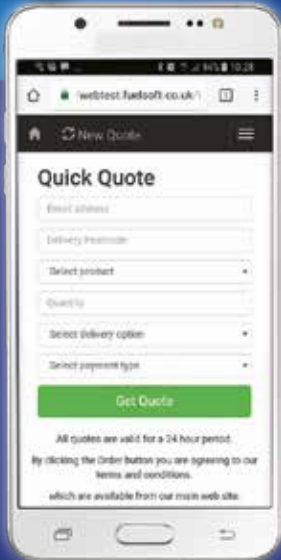
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Coming into service in October 2020, the new tanker 'will help strengthen our NWE physical market position' and give 'the option of supplying more niche ports' says Barry Newton, MD, Geos Group

Geos Group – an exciting opportunity

Due for delivery in October 2020, the Geos Group has placed an order for a 4,250-deadweight product tanker and entered into a long-term agreement with Thun Tankers BV.

The tanker, which will be built by Scheepswerf Ferus Smit B.V. in the Netherlands, will be constructed with a NAABSA design – Not Always Afloat but Safely Aground. The focus has been on maximising the vessel's cargo intake and increasing in-port performance, with the scope to allow further increased cargo lot sizes going into restricted niche ports.

"The NAABSA vessel being built by Thun Tankers for our own requirements will help strengthen our NWE physical market position," said Barry Newton, MD, Geos Group.

"The new vessel will allow us to focus on enhancing our position as the most reliable bunker supplier in our market by bringing in additional ship-to-ship capability, as well as the option of supplying more niche ports.

"This is an exciting opportunity for us and our clients alike and can only strengthen our partnership with Thun Tankers and take us into a period of strong partnership and growth together."

"Having identified the demand for improved niche size tankers with increased performance and cargo capacity, this NAABSA-Max tanker will be built to the absolutely latest design," added Joakim Lund, CCO, Thun Tankers BV.

"This will enable the Geos Group and its clients to access the most efficient transport solution available in this size of shipments."

Shipping – key to the economy

In the week commencing 9th September, maritime trade took centre stage as 20,000 industry leaders headed for London's International Shipping Week.

The aim of the week's global maritime event was 'to show the UK is open for business and has a bright future in international trade' said the Department for Transport with ministers also highlighting the value of the shipping sector to key coastal communities with the sector directly employing more than 186,000 people.

"Our maritime industry is thriving, and fundamental to our success as a trading nation, contributing £14.5 billion to the UK," said maritime minister, Nusrat Ghani.

The UK has a proud maritime history, and shipping remains key to the economy, directly contributing £14.5 billion to the UK's GDP and accounting for 95% of British trade.

As government looks towards the UK's role as a premier global trading nation post-Brexit, ministers used the week to set out a range of measures to support the maritime sector even further, including plans and investments to strengthen UK ship-building, boost cutting-edge maritime technology, and increase the uptake of careers in the industry.

Gulf's special edition

Should you be interested in owning a limited-edition Brown Lee Performance Gulf Heritage Edition Mustang, it costs \$139,995 which includes a 2019/2020 Ford Mustang GT Premium.

Production will be limited to 119 units globally – the 119 serial numbers signify the 50th anniversary of the Gulf '69 24 Hours of Le Mans victory.

Each Gulf Heritage Edition Mustang comes with a three year/36,000-mile limited warranty as well as an official letter from Gulf Oil congratulating the owner with signatures from Gulf and Brown Lee Performance executives.

Do send an image to Fuel Oil News if you do decide to purchase!



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Hybrid HGVs

According to a new report from the Energy Technologies Institute (ETI), the transition to zero emissions in the HGV sector may require hybrid vehicles.

As the UK strives to achieve a net zero energy system, the report – *HGVs and their role in a future energy system* – addresses decarbonisation options for HGVs which currently account for around 4% of total UK carbon emissions, although this could rise to a 15% share by 2050 if no action is taken.

www.eti.co.uk/insights/hgvs-and-their-role-in-a-future-energy-system

Whilst the ‘most promising long-term solution (for HGVs) is seen as electrification’, existing technologies pose challenges. The report says that gas-electric plug-in hybrid vehicles could act as a bridging solution from 2025 to 2040, while zero CO2 tailpipe emissions options are developed. The use of hydrogen, either in zero emission vehicles, or in plug-in hybrids, will require the supply of large volumes of cheap, clean hydrogen.

With respect to the electrification of HGVs, it is thought that the availability of suitable vehicles, rather than the difficulty of generating and distributing sufficient electricity, will be the largest constraint.

“The HGV sector is a difficult area to decarbonise,” said Jonathan Wills, ETI’s chief executive officer

“This research has identified that plug-in hybrid HGVs are a viable next step, if overall energy system transition costs are to be minimised. Changing the purchasing behaviour of fleet operators will also be really important to help investment in new technologies.”

A greener fleet

‘Sending out a strong signal for low-emission, noise-reduced transport’, the HOYER Group is progressively enlarging its fleet with LNG trucks and CNG vehicles, with its most recent additions being two LNG trucks put on the road in partnership with Nippon Gases Deutschland.

“Transporting gases liquefied under pressure and cryogenically on a daily basis, we ensure gases of all kinds are transported safely and smoothly,” said Thomas Hüttemann, managing director of the Gaslog business.

“The growing LNG market has an especially positive effect on the balance sheet of our business. Now, we’re not only transporting these alternative energy sources, but also driving with them ourselves, it was a logical consequence for us.”

Whilst the company is also considering the purchase of electrically-powered cars, it points out that ‘adequate solutions for heavy commercial trucks are not yet available in the market’, and many countries do not have a service station network for alternative energies which is an additional obstacle.

Alternative drive systems will be ‘followed up intensively in the future to achieve the company’s target of reducing CO2 emissions by 25% per ton/km by 2020’.

Apprenticeships, virtual reality and the energy transition

Over 20 years more than 2,000 trainees have successfully completed OPITO’s four-year Oil & Gas Technical Apprenticeship Programme (OGTAP) to secure work in the industry, with 103 new trainees welcomed into the programme last month.

“A recent review by OPITO and Robert Gordon University highlighted there could be up to 40,000 new people needed over the next 20 years,” said Scottish energy minister Paul Wheelhouse who attended last month’s SPE Offshore Europe 2019.

“As the industry moves further into utilising artificial intelligence, robotics and digitisation and embraces opportunities arising from the energy transition, this will include 10,000 posts which don’t exist today.”

With support from sponsoring companies, OPITO has produced the OGTAP Champions’ films which will be shared with schools, colleges and career development agencies around the country.

“In a peer-to-peer approach apprentices have



OPITO CEO with apprentices Robyn Burn and James Penmon

shared their own experiences in order to help the next generation to evaluate the apprenticeship route and consider a rewarding future career as the industry progresses the energy transition,” explained John McDonald OPITO CEO.

Mission ready with simulation technology

OPITO’s Global Conference takes place in Kuala Lumpur on 6th November where the guest speaker will be British astronaut major Tim Peake who will share how he prepared for a six-month mission on the International Space Station.

“My extensive training, particularly using virtual reality simulators, was undoubtedly the best preparation for launching into space and living there for six months,” explained Tim.

“If you’ve tested scenarios repeatedly it means you can quickly react to situations.”

“There are real similarities in how the energy and space industries prepare people to operate safely in demanding and extreme environments,” said John McDonald.

“We can learn a great deal from Tim’s inspiring space experience, how simulation technology helped him get mission ready and how these new techniques can be used in energy sector.”



Major Tim Peake – the keynote speaker at OPITO’s Global Conference next month

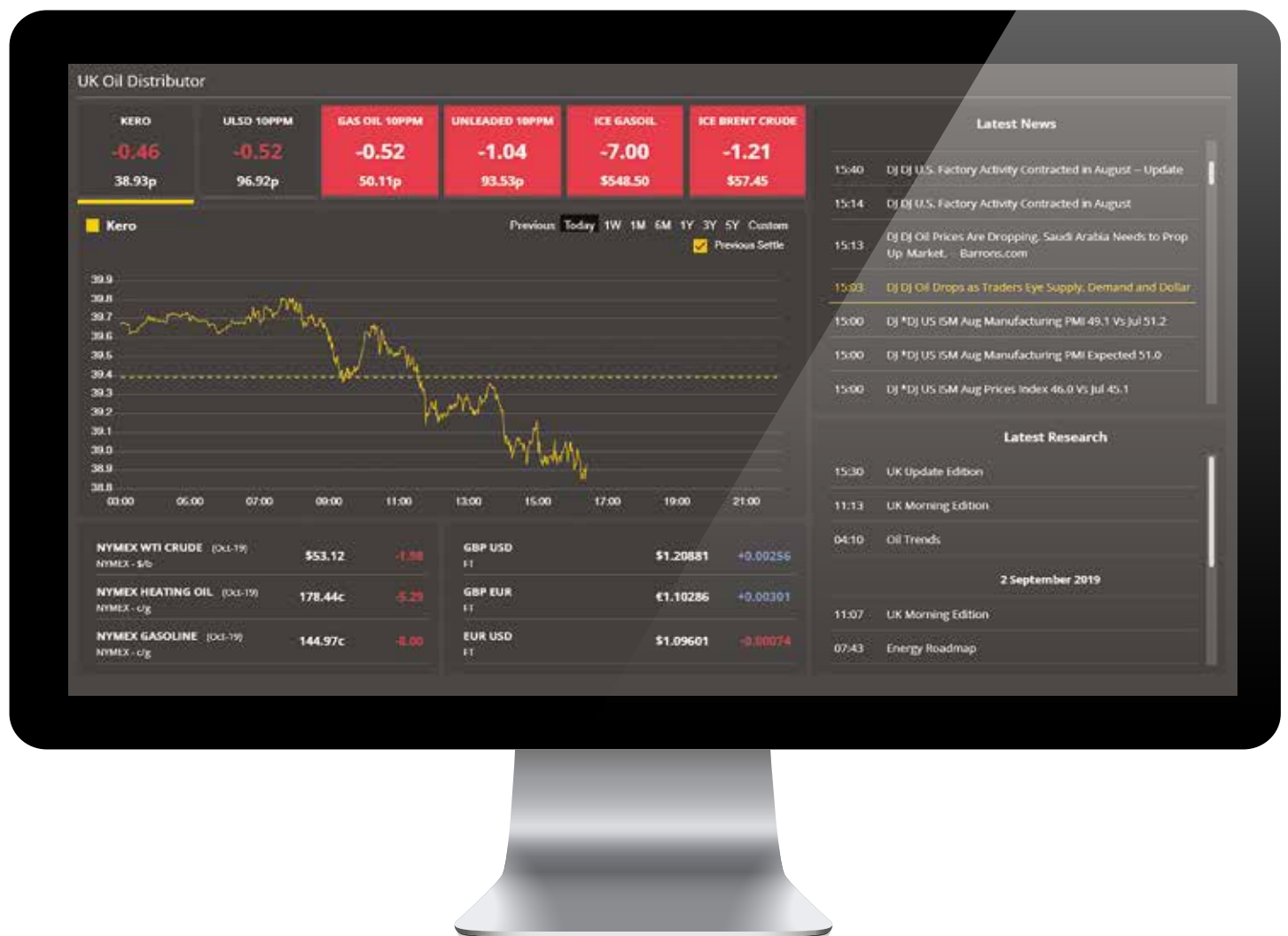
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PORTLAND MARKET REPORT

“IN THE UK, WIND POWER HAS GONE FROM GENERATING 2M TOE IN 2009 TO 13M TOE IN 2019”

October update

Last month to celebrate Portland’s 10-year anniversary, we considered how much change had been experienced in the oil industry over the last decade. This month, we will continue the theme by looking at energy beyond oil, where developments have arguably been even more significant.

Excluding oil, the biggest energy source – and polluter – at the turn of the Millennium was coal. By 2005, coal-fired power generation was hitting record heights, as the likes of China went on a building spree that at one point commissioned 1 new coal-fired power station every month. This had peaked by around 2005 and since that point, coal has experienced a rapid turning of the tide in the face of economic and environmental considerations. This has been particularly true in the West and no country epitomises this decline better than Britain. As recently as 2014, the UK was regularly relying on (imported) coal for up to 40% of its electricity. Today that figure rarely goes above 5% and coal-free days, weeks and even months are regular occurrences. This trend has been replicated in Europe and most importantly in the USA, where annual coal consumption has reduced from 471m tonnes of oil equivalent (toe) in 2009, to 317m toe in 2019.

In China, the picture is more complicated and, on the surface, less heartening. First of all, the figures are a whole lot bigger – in 2009, 1,685m toe of coal was consumed (3.5 times that of the USA), which equated to 87% of electricity generation in China. 10 years later and the consumption figure is actually higher (1,907m toe), which is a reflection of China’s tremendous economic growth over the last decade. However, perhaps a more encouraging measure is that coal’s share of Chinese power generation is declining. The figure today is around 65% (still high), but that is expected to fall below 50% in the next 5 years, as the dire state of local air quality has forced the Chinese Government to shift away from coal.

The two winners from this decline in coal usage are natural gas and renewables, with gas

in particular growing its share of global power generation to above 30% (from 20% 10 years ago). From an emissions perspective, this shift is positive, with gas emitting less than half the CO₂ of the equivalent volume of coal. But for hardened environmentalists, Natural Gas is still not a preferred source of energy. After all, it is still a fossil fuel and by encouraging its consumption, we are simply fostering further hydrocarbon exploration. Taking such a view neatly sums up the conundrum of modern environmental politics, which can be seen as a battle between pragmatism and idealism (as in all politics!). Increasing the use of gas has the immediate effect of reducing CO₂ emissions, versus more common and more polluting alternatives. Against that, it still adds CO₂ to the atmosphere! Businesses such as Portland would always favour realities above ideologies and therefore, we would see gas as the quickest and most straight-forward route to a lower carbon future, as it can easily displace more polluting energy alternatives.

That being said, anti-gas environmentalists still have a point in that simply increasing the use of one fossil fuel over another, hardly signifies a major transition - let alone an energy revolution. However, alongside the gasification of power generation, we are also witnessing the astonishing growth of renewables, which could genuinely be viewed as a 21st Century industrial revolution. Admittedly, renewables were starting from a low base, but even so, growth in this area has been virtually exponential. In the UK, wind power has gone from generating 2m toe in 2009 to 13m toe in 2019. And solar power has increased from a tiny 4,000 toe to 3m toe today – that’s a 646-fold increase!! Across the whole of Europe, the share of renewables in electricity generation has gone from less than 10% in 2009 to over 25% today, whilst in the USA and China, the figures also demonstrate this very clear trend (9% to 17% in USA and 8% to 20% in China). Yes, it has to be acknowledged that renewable energy has often received very significant initial subsidies, but thanks to this (or in spite of this), renewables have gone from being

niche technologies against climate change to today becoming one of the key elements of our energy system. If you had said 10 years ago that by 2020, almost 50% of power generation would frequently be renewable, you would have been laughed out of town. But today it is a reality and the beauty of renewables is that once initial capital costs have depreciated, generation is (give or take) free. This, along with low interest rates and the favouring of infrastructure projects, makes for an extremely attractive long-term investment model.

Finally, we have one piece of the global energy jigsaw that has barely changed over the last 10 years but still should demand attention. Nuclear energy in OECD countries accounted for about 10% of power generation in 2009 and still contributes at similar levels today. As the debate around climate change intensifies to almost frenzied levels, the fact that nuclear energy is seen as increasingly inconsequential is puzzling to say the least. Here is a known and efficient energy source, that has seemingly been written-off, despite the fact that it contributes precisely zero CO₂ into the atmosphere. Portland is neither an expert on, nor a cheerleader for, the nuclear industry, but can it really be sensible to walk away from this endless source of energy? It is said that nuclear waste may take up to 1,000 years to degrade, but if we are truly facing a climate emergency today, wouldn’t we consider prioritising the now above a problem that may or may not affect us at the back end of this Millennium?

For more pricing information, see page 22

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A Q&A with Guy Pulham, CEO, UKIFDA

'Biofuels should be part of the future' – are you still optimistic about the progress being made and the recognition for their role?

I am optimistic that biofuels can and should play a part in a decarbonised future for off-grid heating in both the UK and Ireland. There seems to be a growing acceptance that one technology cannot be the panacea for all households without significant cost for some homes, due to the fabric of the building. The final stage of the Renewable Energy Association's Bioenergy Strategy – see page 40 - highlights that bioliquid fuels are an immediate opportunity for heat in buildings – as part of a range of decarbonisation solutions that will be specific for each business or household.

A pathway to which UKIFDA, OFTEC, TSA and UKPIA were all agreed, how was the Clean Growth Future Vision document received?

Published in May, our *Future Vision* was distributed to members, industry bodies, BEIS, UK MPS and Irish TDs. Finding support in many areas, the simple 4-stage plan was well-received. Indeed, the Science and Technology Committee's report on Clean Growth supported stage 1 of our plan, in that the government's new energy efficiency policy must provide all homeowners with the incentive to make energy efficiency improvements to their property; with particular thought given to lower income households, as well as the financial means to do so.

We continue to work alongside other trade associations both collectively and individually, and I hope that a new Steering Team (including OFTEC and TSA) will be formed very soon. This will help us to move forward with new

trials of bio blend fuels and to research future low carbon fuels. You should expect to hear about these workstreams as soon as the team's composition is decided. This work will replace the pathway initiative.

A new, updated version of UKIFDA's *Future Vision* will be published very soon; this will be a topic of discussion at our October regional meetings.

Having digested a plethora of reports over the past year in both the UK and Ireland, have your views changed with respect to the industry's role going forward?

My views haven't changed – in fact recent reports have made me think that industry trade associations have been on the right track for some time.

In the UK, it's good to see the small change in positioning; 18 months ago, biofuels were rarely mentioned in relation to decarbonisation ideas. Now, whether seen as an immediate opportunity – REA report September 2019 – or a speculative option – Committee on Climate Change report May 2019 – they are at least included in the range of options.

I am also pleased to see that energy efficiency (irrelevant of heat source) is a consistent message from all interested parties which is why it is stage 1 in our *Future Vision*.

In Ireland, electricity still seems to be seen as the only solution in certain government offices. UKIFDA's Irish representative, Nick Hayes and I are working alongside IPPIA, OFTEC and other interested parties to shape discussions in the same way that has happened in the UK. We will continue to lobby and



influence to ensure that the right solutions are implemented in the right homes to achieve the lowest cost per tonne of carbon saving. Educating and looking after consumers is key in this transition.

However, members should not expect that current levels of demand for liquid fuels will continue either in the UK or Ireland. Some homes will efficiently convert to electrical solutions now, some after minimal retrofit with some being effective with a hybrid system. All of this will reduce demand which is why our members must look at their business models and future proof.

Is UKIFDA still intending to have a big push on membership starting in October?

We are always open to new members! Over the last two years, there has been a 38% growth in associate membership, whereas full membership has been static as the market continues to consolidate. We are now working with Portland on a distributor database that allows us to understand the heatmap of our members and the prospecting opportunities.

Whilst UKIFDA already represents 80% of the volume sold to domestic consumers in the UK, we know that there are distributors who would benefit from the support, representation,

information sharing and engagement of a professional trade association especially as we transition to low carbon fuels. Our first membership drive will take place later this year. We are certainly keen to convert exhibitors to becoming associate members – at a minimum it gives them discount on their stand space – so we are very open to deals on stands and membership!

Should members be actively encouraging their customers to upgrade heating equipment in readiness for new liquid fuels?

With boiler replacement a key part of stage 1 of our *Future Vision*, consumer messaging will be a key part of any future Steering Team alongside OFTEC and other interested parties.

OFTEC is better placed to comment on boiler technology but I understand new condensing boilers will not only save money and emissions by up to 25%, they will also cope with future biofuels.

Domestic tanks will also need to be considered. We know that there are some old tanks in situ and biofuels could be the impetus to change them thereby also reducing contamination and spill risk.

SEE THE NOVEMBER ISSUE FOR THE SECOND PART OF THIS Q&A WITH GUY PULHAM

Don't fail when the leaves fall.

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In business since the 1940s, Alan Murphy Oil works around the stunning Antrim coastline



Independent fuel business Alan Murphy Oil is one of those businesses that has truly stood the test of time, writes Irish correspondent, Aine Faherty.

The business of importing and delivering coal to nearby homes from its shoreside base in Ballymena, Co Antrim was established in the 1940s. As time has passed, the Murphy's at the helm have changed through four generations, but the same steadfast business has remained. While still delivering coal, oil became its main business component in the 1980s.

Running the show for a long period, Alan Murphy introduced oil in 1987. Over time Alan also made many hard and fast business decisions which have ensured the long-term success of Alan Murphy Oil.

Fifteen years ago, Alan's son George who now drives a tanker full-time, stepped up to work in the business and assist his father with the day-to-day affairs. George is a man who really enjoys his work and talks with pride about the family business with which he has grown up.

Working in the business presently are George, Alan, who still keeps his hand in, and

John, a second full-time tanker driver. Showing a loyalty that is rarely seen in modern business, John has been with the company for 33 years.

"We look after him!" quipped George.

Ensuring truck reliability

With trucks used in the business on the road 6 days a week, there's little wiggle room for breakdowns or downtime. Truck reliability is therefore key with this year seeing the business invest in a brand-new vehicle equipped with a MechTronic OptiMate fuel metering system.

"Being so precise it's an excellent tool for budgeting and planning ahead," said George.

"And, the new vehicle is not only very efficient, it's also proving to be very economical on fuel."

Geographically, Alan Murphy Oil's work is much more spread out than it used to be with drivers and drops being further from each other than before.

"Not all work is on the doorstep now; you're out driving for longer periods," says George who puts this down to more competition from other fuels, including renewables, plus increasing competition from other fuel providers.

Also engaged in more non-domestic trade now, Alan Murphy Oil has a number of agricultural customers and pleasure boat users along with some business customers, which keeps the business afloat during the less busy summer period.

Brexit is not something that this north of Northern Ireland-based business is concerning itself with very much; not doing business near to the border, it doesn't believe Brexit will have a major impact on the company in the short-term.

"We're not thinking about it," says George who takes the view of what will be will be...

"Like other businesses, we will react to whatever circumstances might prevail.

For now, the dynamic team of George, Alan and John will motor on and enjoy the fruits of their labours around the stunning Antrim coastline.

REMEMBER – ENTRIES FOR THE 2019 TITLE OF FUEL OIL NEWS TANKER OF THE YEAR CLOSE ON HALLOWE'EN – THURSDAY 31ST OCTOBER 2019

Award winning solutions to safety and productivity challenges

HONEYWELL INDUSTRIAL SAFETY, PART OF THE COMPANY'S SAFETY AND PRODUCTIVITY SOLUTIONS GROUP (HONEYWELL SPS), IS AN INDUSTRY LEADER IN SAFETY AND PERSONAL PROTECTIVE EQUIPMENT. ITS BROAD PORTFOLIO, WHICH HELPS ORGANISATIONS TO MANAGE WORKPLACE SAFETY, INCLUDES PERSONAL PROTECTION GEAR FOR A WORKER'S EYES, EARS, HEAD AND HANDS – PLUS RESPIRATORY PROTECTION, FIRST RESPONDER GEAR, GAS MONITORING DETECTORS AND FALL PROTECTION SOLUTIONS



High visibility colours increase safety awareness and aid communication gestures in low-light conditions

The Honeywell User Experience

In 2012, Honeywell integrated its design thinking methods and tools into its own product creation process in a new department, Honeywell User Experience (HUE). Today, there are 10 of these centres worldwide with 60 talented and experienced designers able to define, articulate, visualise, prototype and evaluate the most suitable product and process solutions for their customers.

Combining creative designers with strategic marketing and engineering expertise Honeywell is delivering more innovative, sustainable and connected solutions. By partnering with customers to understand their needs and the environments in which they operate the products created are functional, easy to use, and compelling.

To see how this process works in practise, Fuel Oil News visited one such HUE centre – the SPS Experience Design studio in Bracknell, Berkshire – to meet members of the team and to talk with Pete Holdcroft, global creative director of experience design at Honeywell and Gerard Jorna, EMEA experience design director.

Pete outlined the ethos of the HUE design experience: “The Honeywell team works closely with its customers to understand where their industrial safety and productivity challenges

lie. From the field-based experts who carry out the research direct with customers through to studio-based developers who design the products which meet these needs the Honeywell team comes up with the solutions required for a whole range of safety and productivity demands.”

The resultant industrial safety products have been recognised at the highest levels, with many winning design awards, including the prestigious iF Design, Red Dot and Good Design Best 100 awards. Alongside are examples of Honeywell's award-winning products.

“In addition to the introduction of the Honeywell User Experience came the Honeywell Design Language,” explained Pete.

“This was established to align the look, feel and functionality of products brought into our range through acquisition, to make them easier to use and to ensure customers receive the same experience every time.

“For example, having a hearing set with dedicated sensors in addition to a protective uniform and a wearable gas detector with similar connectivity capabilities makes it easier and more efficient to protect your workers in the oil & gas industry than just having one of these devices.”

Rig Dog Xtreme the next generation of impact – and cut-resistant gloves (pictured left) for rugged industry with increased range of motion, lightweight dexterity to reduce hand fatigue over previous models and high visibility colours that increase safety awareness and aid communication gestures in low-light conditions.

Verishield a new ergonomically designed earmuff (below) constructed to fit a variety of ear and head shapes for a range of applications. The lightweight design and ‘memory’ foam cushions are optimised for comfort and a more consistently sealed fit that helps maintain noise attenuation capacity.



Searchzone Sonik an ultrasonic gas leak detector that listens for the sound signature produced by pressurised gas leaks instead of requiring a gas cloud to come into contact with the device. Since sound is unaffected by wind and other environmental factors the Searchzone Sonik complements other forms of gas detection to alert personnel of a potentially dangerous event faster. Communication with the device through an app eliminates the need to climb a ladder or scaffolding, while the LED indicator allows the product's status to be checked from a distance. The ‘focus mode’ of the detector emphasises direction thus eliminating any issues caused by nuisance alarm sources.

Pikachu (Red Dot Award), a full-body harness designed to protect workers at heights or in confined spaces where electrical arc flash hazards are present through use of arc flash resistant materials, electrical insulation properties and a global anthropometric fit.



Belgium's downstream oil sector

A NOTEWORTHY FEATURE OF THE BELGIAN ECONOMY HAS BEEN THE REMARKABLE STABILITY AS TO THE BREAKDOWN OF PRIMARY ENERGY DEMAND IN THE CURRENT MILLENNIUM. SHARES OF THE TWO MAJOR SOURCES REMAIN UNCHANGED; OIL, AS THE LARGEST ACCOUNTS FOR 40%, WITH NATURAL GAS AT 26%. AT JUST UNDER 20%, NUCLEAR, THE THIRD LARGEST SOURCE, HAS ALSO HARDLY CHANGED WHILE COAL HAS FALLEN FROM 9% TO 5%. THE RENEWABLES SHARE HAS RISEN FROM 3% TO ALMOST 9%.

In 2018 the country's four major sources of crude oil supply were Russia (40%), Middle East (22% – mainly Saudi Arabia), the North Sea (18%) and Africa (14% – mainly Nigeria). Along with the Netherlands, the country plays a pivotal role as a European oil trading hub, centred in Antwerp, where its three refineries are located.

THE OIL SUPPLY CHAIN

The port city of Antwerp is the focal point for refining and distribution; having a deepwater port it is accessible to liquid and bulk carriers of up to 160,000 tonnes and very large container vessels of 18,000TEU. The port incorporates Europe's largest integrated oil and chemicals cluster, with 7 million cubic metres of liquid storage and pipeline connections to Rotterdam, France and Germany.

REFINERY OWNERSHIP	CAPACITY (000BD)
Total	340
Esso	320
Gunvor	110
GRAND TOTAL	770

With a capacity to produce 1.1 million tonnes of ethylene per year, the **Total** facility is the company's largest European refining and petrochemicals complex. Recent investment of circa €1 billion has upgraded the complex to produce more light products to meet the strictest environmental standards. Enabling the complex to be more flexible, it now uses the most cost-advantaged feedstocks available, which has increased the synergies between refining and petrochemicals.

The **Esso** facility has made an investment of a similar magnitude with the construction of a 50,000BD capacity delayed coker which enables more of the residual fuel oil stream to be converted, giving additional availabilities of diesel and mindful of IMO 2020 regulations marine gasoil.

Oil trading group, **Gunvor**, purchased its refinery from Petroplus in 2012 when the latter went into liquidation. For the refinery's size, the facility is supported by a very large one million cubic metres storage facility.

Up from the recent low of 68% in 2013, refinery utilisation is running at around 85%. There is a distillation capacity of 40 million tonnes/year with overall cracking capacity amounting to 11.6 million tonnes/year. Reforming is at 4.9 million tonnes with desulphurisation at 34.6 million tonnes/year.

Having two of Europe's top ten worldscale refineries and a population of 11.5 million, it is not surprising that Belgium's throughput exceeds market requirements by almost 20%, based on recent years' out-turns.

Product balances show a sizeable surplus of motor spirit and a modest surplus of middle distillates, the former being exported principally to the US and Africa and the latter to France and Germany.

Oil product distribution for the Flanders region is centred out of the Antwerp refining complex, while, for Wallonia, it emanates principally from Feluy, just south of Brussels, which is pipeline fed from Antwerp.

Mandatory stocking obligations are managed by a public limited company, Apetra, which levies charges on market participants. These charges are reviewed on a quarterly basis and to 30th September 2019 stood at 0.781 cents/litre for Cat 1 (motor spirit) and 0.802 cents/litre for Cat 2 (diesel/ gasoil).

PRODUCT DEMAND

In aggregate, oil product consumption has only shown modest change in the current millennium, with increases in LPG and Jet A-1 and reductions in heating gasoil and modestly so for diesel since 2016.

(Million Tonnes)

Product/Year	2005	2010	2015	2016	2017	2018
Motor Spirit	1.8	1.2	1.4	1.5	1.5	1.7
Diesel	6.2	7.1	7.0	7.1	6.8	6.7
Heating Oil	5.6	4.6	4.1	3.7	3.7	3.5
Jet A-1	1.2	1.3	1.4	1.4	1.6	1.8
LPG	0.3	1.2	2.3	2.1	2.1	2.0
Others (1)	6.2	5.9	6.7	6.9	6.7	6.5
GRAND TOTAL	21.3	21.3	22.9	22.7	22.4	22.2

Excluded from the table below are international marine bunkers, comprising circa 5 to 5.5 mln tonnes/year of fuel oil and 1.5 mln tonnes of gasoil.

The main driver behind the rise in LPG demand over the past 10 years has been increased use as a petrochemical feedstock, which currently accounts for around 85% of requirement.

MARKETING

In the past 20 years, three significant developments have affected the competitive landscape

- In a series of global acquisitions at the start of the current millennium, Total purchased Petrofina and then Elf; both had a strong presence in the local market place, with the former being the market leader.
- Russian company, Lukoil, acquired the Jet network plus associated logistical assets in 2006; since then the network has expanded from 157 sites to around 180.
- Acquiring the Texaco Benelux network, Israeli company, Delek Petroleum, gained 259 Belgian sites from Chevron in 2007. In 2014 this acquisition was divested to TDR Capital, a London-based private equity group whose partner, Lancashire-based Euro Garages (EG Group), now manages the business.

Retail – over the past 10 years, site numbers have shown a relatively modest 5% decline down from 3,258 to 3096 at the end of 2018.

The proportion of unmanned sites has

Source: Service Public Fédéral Economie

Note (1) Principally naphtha, used as a petrochemical feedstock (circa 5 million tonnes/year)

Inside Out

Continued from page 17

nearly trebled to around 22% over this period, which is comparable to the Netherlands share. Average fuel volumes, at just over two mln litres/year are also comparable – but less than half the UK level of 4.2 mln litres.

Belgium retains a system of administered maximum permissible pump prices. This is based on a formula made up of ex-refinery wholesale prices + applicable supply chain costs & margin + applicable taxes (excise duty & VAT). Currently this allows a fairly generous maximum gross margin of 17.7 cents/litre – from which unmanned outlets typically discount 3-4 cents.

As in France, Belgium has in recent years pursued a policy of having duty equalisation between motor spirit and diesel and they are now the same, at 60.02 cents/litre.

Operators in the retail sector are Total, Q8, Shell, Esso, Texaco and Lukoil

The market leader is Total with around 17% and 530 sites, followed by Q8 at 15% with 460 sites, to which a further 75 will be added following recent acquisitions from independents. Below this are a cluster of four companies – Shell (270), Esso, Texaco (Euro Garages) and Lukoil (180) – with market shares

HEATING OIL

Representing one third of households, 1.7 million Belgian homes rely on heating oil which is the largest proportion in any European country. Used by 55% of households, natural gas is the main energy source. Overall, the Belgian market is the third largest in Europe, after Germany and France. Called mazout, the fuel used is gasoil with a maximum sulphur content of 50ppm, reduced from 1000ppm from 1st January 2016.

Informazout, the Belgian information centre for the rational use of oil heating, has been arguing for a stepped approach and an energy open technology mix to reach Europe's climate objectives. Informazout has developed different communication tools which focus on the important role of hybrid heating systems in existing homes as a realistic and least expensive way to reach the EU targets in 2030 and beyond.

In collaboration with an external engineering company, the centre published the results of a comparative study as to the long-term costs over a 15-year period of a variety of retrofitted heating systems, including replacing an old boiler with a new high efficiency oil boiler or a hybrid heating system. The combination of a condensing oil boiler and solar came out as the best option, environmentally and financially.

in the 5-10% range.

As in several other European countries, such as the UK and France, Esso began divesting its owned/leased sites principally to independents in 2012, under its branded wholesaler programme.

Independents account for ownership of around one third of the country's site network – the two largest being Maes (280 sites) and G&V Energy Group (200+ sites).

Supermarkets account for about 5% of sites – local groups Colruyt, Cora and Makro along with more recent overseas groups, Carrefour and Tesco.

There were 1,600 electric charging

locations at the end of 2018 (vs 380 in 2013), with sales of electric cars totalling just over 9,000 during the year; in total, these account for a very modest 0.5% of the car parc.

Relative stability has been the hallmark of Belgium's downstream sector since the three developments detailed earlier, with two of the country's refineries undergoing substantial upgrades. In the retail market it seems probable that the two large independent groups will play an increasing role in site ownership and/or operation. Given Antwerp's size/scale as a marine bunkering location, it is likely that availabilities of heating oil will come under pressure from the onset of IMO 2020.



Taking control – products & services for an easier life

BELOW AND ON PAGE 21, FUEL OIL NEWS LOOKS AT SOME PRODUCTS & SERVICES DESIGNED TO HELP MAKE LIFE EASIER FOR YOU AND YOUR CUSTOMERS

Protection for fuel distributors and customers

Designed to raise the quality of fuel used across the industry, and authorised by UKIFDA, OTS TankCare™ has created an independent fuel certification scheme.

The TankCare™ Fuel Quality & Certification (FQC) scheme works by measuring fuel stocks for contaminants, at six weeks and then again at six months, with its testing method and procedures being the fastest, most accurate and least expensive when monitoring, controlling and predicting microbial contaminant activity.

With the tests detecting as little as one living cell per millilitre, the system can track and predict potential contamination risks. Subject to passing strict tests, fuel is certified at six months, tests are then repeated every six months to ensure quality is maintained. This gives time for measures to be taken, should fuel quality drop.

If fuel quality is not up to standard after the initial six-month test, it is recommended that tests continue quarterly.

Fuel stocks can easily become ‘dirty’ – most often by water or particulate and biological contaminants, rendering them unfit for purpose. Poor quality fuel not only risks increasing tail pipe emissions, but can also cause engineering malfunctions and engine damage, resulting in costly repairs. End users must maintain fuel tanks effectively and only buy good quality fuel from distributors that test and certify their stocks.



Stages of fuel contamination – “protecting everyone in the fuel supply chain, this scheme improves the quality of fuel across the board,” says Steve Gain.

“We want to protect the interests of fuel distributors as well as encourage all fuel users to buy high quality certified fuel – the aim of the TankCare™ scheme is to achieve a quality seal of approval for fuel quality,” commented Steve Gain, managing director at OTS TankCare™.

Complete control of fuel deliveries

OptiMate, MechTronic’s electronic metering system, provides a range of automatic processes which save time and money and prevent contamination during customer deliveries. Its self-draining manifold enables a cleaner line change and protects fuel oil distributors against contamination. With the addition of automatic compartment follow-on, drivers no longer need to return to the vehicle to perform the changeover, enabling faster deliveries.

When combined with VisiLevel, fuel oil operatives are also protected against contamination at the point of loading. VisiLevel automatically identifies the contents of each compartment by measuring the volume, temperature, density and colour, displaying the output on its LCD screen. Drivers can instantly see which fuel is in each compartment and load their tanker accordingly. VisiLevel also links to a cloud-based reporting tool that gives fuel oil operatives a live audit trail, a useful tool if drivers need to be re-routed to fit changing customer demand.

Finally, drivers are in complete control of their fuel delivery with the Pro Control 3 Remote, volumes can be pre-set from inside the cab and with the remote’s automatic hose reel rewind function, drivers no longer need to manually load the hose back to the tanker – improving driver safety.



OptiMate has ‘a range of automatic processes which save time and money and prevent contamination during customer deliveries’

Kingspan
Intelligence
Inside



You may not know
this week's lotto
numbers but you
could know how
much oil is in your
customers tanks
at all times



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Trigger contracts – shaping the industry’s future

Every decision that’s made for the progression of the OnlineFuels platform is based around one question – **does it remove the pain points for the end-user?**

So far, we’ve built an online marketplace that gives market visibility to distributors and allows them to monitor, compare prices and purchase from multiple suppliers throughout the day. It’s not just the distributors that have it easy, suppliers now benefit from another medium of sales without additional resources.

A permanent feature that is especially beneficial over the winter months is our Trigger Contracts. With these, you can commit to a certain monthly volume with a supplier at an agreed premium over the live market. You then ‘trigger’ volume throughout the month. This gives you a guarantee of supply while benefiting from the live market movements, which over the winter months puts you in a much stronger position.

Stuart Jobs of OilNRG who has been using the new trigger contracts says:

“The advantages to me are it is 100% live which mitigates risk; we can back to back orders live against the market especially orders taken for delivery after the D2 price expires.”



OnlineFuels – giving market visibility to fuel distributors

Quick and easy fuel ordering and deal administration

Mabalive, Mabanafit’s unique online service, makes the process of buying fuel and managing your trading account as quick and easy as possible, as well as providing complete transparency throughout the deal lifecycle.

Customers can log in and view live ex-rack pricing and instantly order their fuel online on Mabalive. They can also manage deal administration including tracking a deal, with real-time reporting, from lifting at the terminal to final invoicing.

Placing an order online is quick and easy, and saves time on phone calls, while the online audit trail supports more accurate and efficient administration.

Key information and headline reports are presented in a dashboard, providing a clear and intuitive at-a-glance overview of the account. Customers can also drill down for more detailed reporting – purchased orders, daily movements, balances to lift, expiry dates of terminal releases etc – and to view a comprehensive invoice history. All key reports can be downloaded in either CSV or PDF format.

“Customers using Mabalive say they like having instant access to the market and that it is quick, easy and convenient to use,” said Martin Cook, joint managing director of Mabanafit Limited.



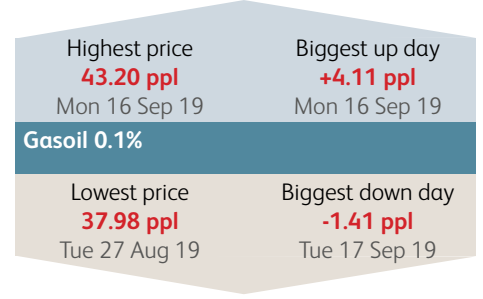
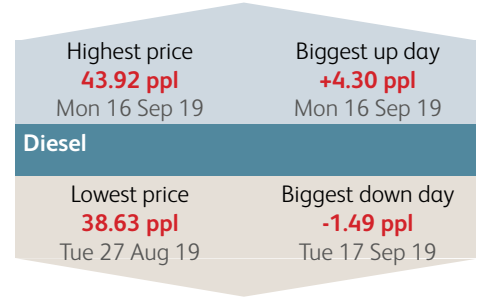
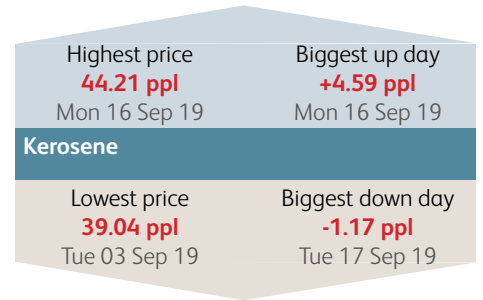
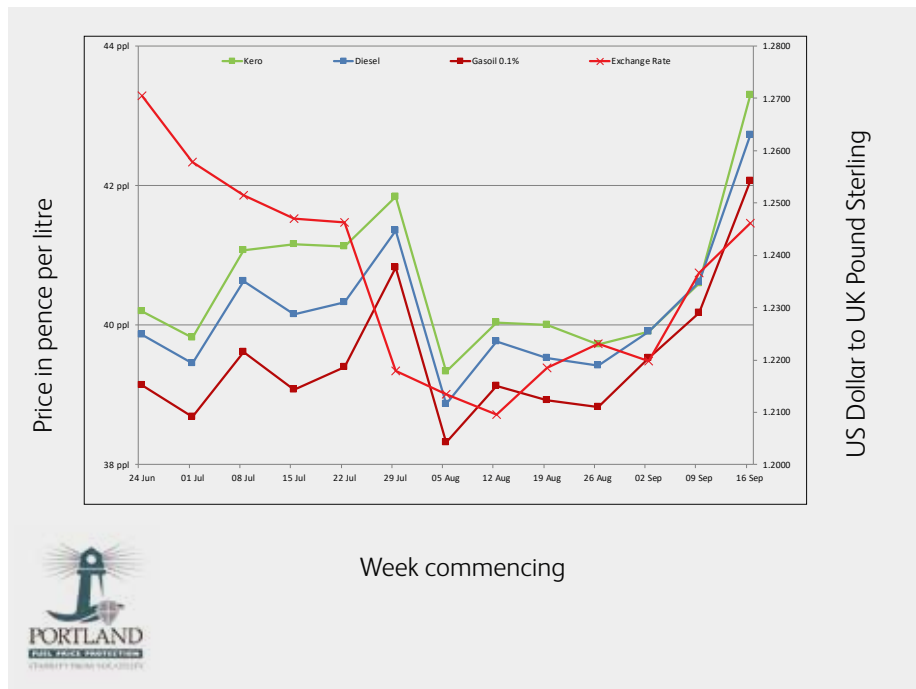
The new Mabalive dashboard gives a snapshot of activity - “Those managing their trading account on Mabalive tell us they really like having real-time visibility of their account status online,” says Martin Cook.

LOOK OUT FOR MORE PRODUCTS & SERVICES FOR AN EASIER LIFE IN THE NOVEMBER ISSUE OF FUEL OIL NEWS

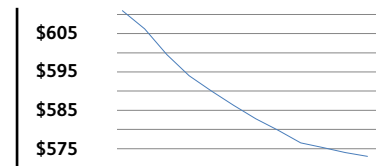
Wholesale Price Movements: 19th August 2019 – 18th September 2019

	Kerosene	Diesel	Gasoil 0.1%
Average price	40.50	40.27	39.74
Average daily change	0.75	0.79	0.78
Current duty	0.00	57.95	11.14
Total	40.50	98.22	50.88

All prices in pence per litre



Gasoil forward price
in US\$ per tonne



October 2019 – September 2020

The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Scotland	41.65	55.50	102.19	45.95	59.95	106.35
North East	40.05	53.60	100.46	49.25	56.87	102.75
North West	42.73	57.56	104.06	47.95	59.95	106.95
Midlands	40.21	54.01	100.72	45.95	56.95	102.95
South East	40.52	54.09	100.94	50.36	58.26	103.35
South West	n/a	n/a	n/a	n/a	n/a	n/a
Northern Ireland	42.69	56.89	103.44	47.60	60.10	n/a
Republic of Ireland	55.71	60.05	101.29	59.91	64.32	104.30
Portland	40.67	51.49	98.66			

The price totem figures are compiled from the results of a telephone survey of distributors carried out on 05/09/2019.

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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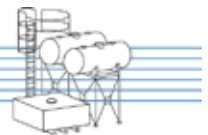
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