

Fuel Oil News

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OCTOBER 2024

UPDATED: FUEL INDUSTRY STATISTICS

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	EN590 DIESEL Summer 16th March – 15th Nov	EN590 DIESEL Winter 16th Nov – 15th March
CFPP* (°C) Specification	-5	-15
CFPP* (°C) Typically with Exocet [®] Additive	-18	-24
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*All fuel delivered from 16th November is winter grade, so no need to add the Anti-Wax after this date.

A three legged stool or a four legged chair?

The World Energy Council has been releasing the World Energy Trilemma Index and Report since 2010. It is a framework of three core elements that energy policymakers must balance when establishing energy policy: Security, sustainability and affordability.

The energy trilemma could be compared to a three-legged stool, with the three equally important legs being; keeping the lights on, keeping energy bills down, and achieving global decarbonisation. Keeping these equally balanced creates a stool fit for purpose.

However, on night outs in your local, or lunchtime meets at a café, when you find a table that just about accommodates your group, which of you hopes for the more comfy looking chair over the somewhat spartan stool?

With the far-reaching impacts of energy policy, is it enough to simply be fit for purpose? Is there not an important element omitted from the framework? Energy policy formulation has historically lacked the vital human consideration of equity or fairness – a consideration of the interests of individuals, that reduces the potential for injustices.

An energy transition is the process of shifting global energy production, distribution, and consumption away from fossil fuels and toward renewable energy sources with the goal of a sustainable energy system producing little or no carbon emissions.

The noticeable omission in this is a consideration of people. Yet, energy transitions are all about people – the ones who make the decisions and the ones affected by those decisions.

Expanding on the previous definition, a just transition is one in which the affected people are considered by the ones making the decisions. Taking this approach ensures we move away from fossil fuels in a way that reduces inequality and ensures that those affected by climate action are not the ones who pay the price.

At time of writing this issue, news came of a decision over Grangemouth refinery future. In these pages we ask whether there has been sufficient consideration of the human impacts of this decision.



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Fuel Oil News

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

4-8 INDUSTRY NEWS

9 PEOPLE MOVES

10-11 DISTRIBUTOR DIARIES

12 & 13 TRANSITION TALK

A just transition for Grangemouth?

14 & 15 I A DAY IN THE LIFE

The young tanker driver who is raising a few eyebrows.

17-18 IN CONVERSATION

What underpins the growth of this successful distributor?

19-23 DOWNSTREAM

Insights from latest industry data.

24 INDUSTRY VOICE

The question of future fleet fuelling – does LNG offer any answers?

25 GALLERY

An essential role for distributors.

26 & 27 PRODUCT FOCUS

Latest sector software innovations.

29 PORTLAND REPORT

Why hydrogen-fuelled vehicles is a grey area.

30 INDUSTRY FOCUS

A statistical analysis of the fuel supply sector.

34 PRICING PAGE

35 IN PROFILE

A proven business leader with a passion for truth and a thing for fast cars, cocktails and Barbie!



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On the cover

A wistful last shout for summer. A Lynx Fuels Tanker set against a beautiful backdrop. Discover this growing fuel distribution business on pages 17 & 18, as we hear all about its new depot, and why its people are its greatest strength.

In this issue

The latest industry data is unpacked in our Downstream section on pages 19 to 23. We look in-depth at recent news of Grangemouth refinery operations while exciting developments in key industry software can be found on pages 26 & 27.

UK launches anti-dumping probe on Chinese biodiesel

The Trade Remedies Authority (TRA) has launched a survey on imports of biodiesel from China, which is designed to gather evidence from businesses and consumers affected by the measures under investigation..

The TRA was one of the first public bodies to be set up to meet the new needs of the UK following its departure from the European Union, and offers a first line of defence for UK producers facing unfair international competition. It is a non-departmental public body of the Department for Business and Trade. Investigating whether new trade remedies are needed to prevent injury to UK industries caused by unfair trading practices, it also makes recommendations on appropriate measures to defend UK economic interests.

The results of the survey, which closes on 4 October 2024, will help the TRA understand the effects that tariffs on imports of the above products might be having on businesses and consumers. Information submitted will be used anonymously for the Economic Interest Test (EIT).

Earlier this year, the European Commission, which oversees EU trade policy, launched an investigation into Chinese biodiesel imports and imposed provisional duties, after initial findings that Chinese importers were undercutting European producers.



Starting August 2024, the European Union (EU) imposed anti-dumping duties on Chinese biodiesel imports, ranging from 12.8% to 36.4%, which will remain in place until a final decision is made in February 2025, when the investigation concludes.

The UK's investigation will conclude in the first quarter of 2025. In the interim, imports will continue to enter the UK market without

any additional tariffs raising concerns among domestic producers about the potential inflow of Chinese biodiesel for several months.

The UK can impose provisional duties before the official findings are released, which means importers will need to offer a guarantee that will cover any subsequent anti-dumping duties.

The UK has set a time line of June 2025 for a final decision

UKIFDA announces 2025 liquid fuel distribution industry event in Leeds

The UK and Ireland Fuel Distributors Association (UKIFDA) has announced that the UKIFDA Show 2025 will be held on 14 May 2025 at the First Direct Arena in Leeds.

Building on the success of EXPO 2024 in Liverpool, and following the inaugural one day event held in Coventry in 2023, which was well-received by the industry, the UKIFDA Show 2025 will be the second of this biennial one-day format.

Themed 'Be Part of the Solution,' the UKIFDA Show 2025 aims to shape the industry's future and is expected to draw industry experts, national companies, independent distributorships and other stakeholders under one roof.

Phillips 66 returns as the event's main sponsor, ensuring a high calibre gathering of industry professionals.

Innovative approach

Ken Cronin, CEO of UKIFDA and event organiser, stated: "Always innovative in our approach, for 2025, we're introducing some new features to keep the format fresh."

The event will feature a 'Speakers Corner' hosting sessions on crucial industry topics, as well as the interactive WHOVA Show App to streamline registration and facilitate communication before and during the event.

The UKIFDA Show 2025 will not only offer a platform for networking and showcasing the latest advancements in the industry, but will also include the UKIFDA Gathering, an innovative evening format replacing the formal dinner with a more dynamic evening featuring a drinks reception, gourmet bowl food, casino tables and complimentary drink vouchers.

The event will also include the popular annual UKIFDA awards, adding an extra

dimension to the day and evening.

Dawn Shakespeare, UKIFDA's membership and events manager, emphasised: "Don't miss this opportunity to be at the forefront of the liquid fuel distribution sector. Whether you're looking to launch new products, demonstrate service solutions or engage in those all-important face-to-face discussions, the UKIFDA Show 2025 is your platform to 'Be Part of the Solution'.

"Join us in Leeds and help shape the sector's future."

For more information, please contact Dawn Shakespeare at ds@ukifda.org



Boost for HVO, as NWF Fuels welcomes MP visit

NWF Fuels, the Crewe-based distributor, was delighted to welcome Pippa Heylings, MP for South Cambridgeshire, and Ken Cronin, CEO of UKIFDA, to their Cambridgeshire depot. They discussed HVO, as the economical solution to decarbonising off-grid homes in the future.

Ken Cronin, CEO at UKIFDA, said: "UKIFDA, with significant help from local distributors, is actively engaging with many new Members of Parliament who represent high-heating oil areas. We have been meeting with MPs, both in person and virtually across the country, and the response so far has been extremely positive.

"It was a great experience to meet Pippa Heylings, MP for South Cambridgeshire, at NWF in Cambridge, along with depot staff and Gemma Wakefield (Marketing Director NWF). This level of engagement allows us to demonstrate to new MPs the importance of our industry to local communities and what we are doing to assist the government and the country in achieving decarbonisation targets.

"Many MPs agree with us that a one-size-fits-all approach to decarbonisation simply won't work."

Working in partnership

Gemma Wakefield, Marketing Director for NWF, added: "We've been working in



partnership with UKIFDA, to support the future move to renewable liquid fuels in home heating.

"It's important we spread the message far and wide on how we can decarbonise off-grid homes economically and with minimum disruption. We're excited to work with other local MPs over the coming weeks to continue



strengthening the message. As an industry, we must work together to generate the biggest impact we can, delivering a simple and fast solution to our customers, and securing the future of our industry."

If you have any planned visits, meetings or discussions with MPs then please do let us know: claudia@andpublishing.co.uk

Confirmed: Grangemouth, the UK's oldest refinery, is to close in 2025

Petroineos has confirmed its intention to cease refinery operations at Grangemouth during the second quarter of 2025, subject to an employee consultation, putting 500 jobs at risk.

Last November, Petroineos outlined plans to

transform the refinery site into a finished fuels import terminal and distribution hub which will require significantly fewer people to operate.

Having confirmed their intention, Petroineos will enter a formal consultation process with the site's 475 employees and their representatives

on the details of the transformation plan, which is expected to lead to a net reduction of approximately 400 roles over the next two years.

A detailed analysis of the decision and its implications can be found on pages 12 and 13 of this issue.

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Achievement of major milestone triggers celebrations for MechTronic

MechTronic Ltd, the Leeds-based metering and gauging fuel delivery system experts, is celebrating another milestone, with over 800 OptiMates now out on the road.

Brad Wilkie, Managing Director, said: "MechTronic is a leading provider of innovative metering solutions, and is proud to celebrate a major milestone for the business: over 800 fuel tankers are now delivering with OptiMate.

"This achievement underpins OptiMate's position as a trusted and reliable solution for fuel suppliers that require accurate and efficient flow measurement. OptiMate was built with the operative in mind. With its future-proof design and core values of saving customers time and money and preventing fuel contamination, OptiMate has gone from strength to strength since its launch in 2016."

Emma Allinson, Marketing Coordinator, added: "We are incredibly proud of the OptiMate electronic metering system. It offers complete accuracy, enhanced efficiency, improved safety and reduces contamination. With over 800 OptiMates now delivering on the road, OptiMate has demonstrably earned the trust of customers. MechTronic's commitment to exceptional customer service further reinforces its position as a leader in the electronic metering industry."

"We are all so proud to achieve this significant milestone" continued Brad. "The success of OptiMate is a testament to our dedication to developing innovative and reliable metering solutions that meet the evolving needs of our customers."

Management buyout completed at leading industry supplier

Simon Van Lonkhuyzen, Managing Director at TEC, one of Ireland's leading suppliers and distributors of a wide range of industrial and hydraulic hoses, fittings, and adapters, is proud to announce that he has completed the purchase of the entire share capital of TEC.

Having first joined TEC in 2000, working in hose assembly, Simon worked his way up through the ranks, holding roles as a Sales Representative, Sales Manager, and most recently, Managing Director. Now, with full ownership of TEC, Simon is eager to continue driving innovation and excellence in the industrial hose industry.

Simon said: "I am incredibly excited to take on this new role as owner of TEC. I am honoured to be leading the next chapter in

TEC's story. Our team and I are committed to maintaining the high standards of service, quality, and reliability from our thousands of hoses, fittings and components that our valued clients have come to expect from us.

"TEC has been a trusted name in the oil distribution industry for many years, known for its market leading fluid transfer solutions including the innovative TECOIL reeling hose and exceptional customer service. The company will continue to expand its offerings while strengthening its relationships with long-term customers."



HVO partnership with Tria Energy supplies greener future for Dyno-Rod Ireland

A new partnership will see Tria Energy supply Dyno-Rod Ireland with HVO, enabling the drainage services provider to significantly reduce the carbon footprint of its vehicle fleet.

"We're proud to partner with brands like Dyno-Rod Ireland in our collective drive to promote sustainable fuels," says Patrick Kirby, CEO of Tria Energy. "This collaboration showcases the immediate and scalable benefits that HVO can offer."

And Barry Benson, Managing Director of Dyno-Rod Ireland, is very positive about the benefits the partnership offers: "We have been delighted with the whole HVO journey so far with Tria Energy.

"We are saving over 400 tonnes of carbon per annum by switching our fleet to HVO, and in Partnership with Tria Energy, we have been able to change our company's carbon footprint and exceed our ESG targets."

A cost-effective way to reduce emissions

The partnership, which moves Dyno-Rod Ireland's fleet away from fossil fuels and onto HVO, delivers a significant reduction in their



emissions by up to 90%. The fuel, produced through a process known as hydrotreating, in which renewable feedstocks, such as vegetable oils and animal fats, are subjected to high pressure and temperature to remove impurities and saturate hydrocarbon chains, is a direct drop-in replacement for conventional diesel. This avoids any additional capital expenditure, unlike other forms of renewable energy.

Founded in 1991, Tria Energy is a leading supplier of renewable energy solutions, specialising in the supply of HVO to various industries across the UK and Ireland. As a distributor of both ISCC-accredited and ZEMO-approved fuel, the company uses its expertise to educate distributors, guide regulators, train verifiers, and empower customers to uphold high standards.

Dyno-Rod specialises in blockage clearance, CCTV drain inspections, drain repairs, and pipework installations for residential, commercial, and industrial premises. Offering 24-hour emergency response, it is the only drain cleaning service with full national coverage.

Logistics UK employees get on their bikes to support charity

Five Logistics UK employees completed an impressive 225 mile bike ride from York Minster to Westminster Abbey in September, and were able to sooth any saddle sores with the knowledge that they had raised almost £3,500 for Macmillan Cancer Support.

The team left York Minster on Thursday 5th September, and arrived at Westminster Abbey at noon on Saturday 7th September, after overnight stops at Newark and Flitwick.

Ian Dunn, Strategic Development Manager at Logistics UK, said: "During our ride, we have had to contend with sore legs, punctures and, surprisingly for a British summer, sunburn, but our struggles pale into insignificance when you think about people suffering from cancer.

"The sad reality is that one in two people will develop some form of cancer during their lifetime, so it has been an honour to raise some funds for Macmillan. Without contributions, Macmillan will not be able to provide the amazing support for cancer sufferers and their families that it does, and I would like to thank everyone who has made a donation."



Dawsongroup Vans Ltd provided an electric van for the Logistics UK support team and Logistics UK Director of Operations, Chris Lipscomb, said: "We are so grateful for the use of such a fantastic vehicle to support our riders, and are really proud of the team and the effort they have put in. And I would like to thank everyone that we met en route for their words

of encouragement, cheers and donations.

"We set out to surpass the £3,000 Logistics UK raised for Macmillan on a previous sponsored bike ride in 2022, so to raise almost £3,500 so far is incredible."

The team is still accepting donations: <https://www.justgiving.com/page/logistics-uk-bike-ride-2024>

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Experience industry leaders appointed to deliver EET Fuels energy transition strategy



Adrian Curry has been appointed as Chief Decarbonisation Officer of EET Fuels to lead the development and implementation of EET Fuels' energy transition strategy,

with the goal of delivering the world's leading low carbon process refinery.

He brings extensive experience as a seasoned chair, managing director, and board member across Europe, the Middle East and Africa (EMEA), with a proven track record of establishing and growing disruptive businesses, large-scale manufacturing, and major capital projects.

Energy transition strategy

Deepak Maheshwari, CEO, EET Fuels, said: "Adrian's appointment demonstrates our commitment to almost fully eliminating our carbon dioxide emissions. His expertise and established regional leadership will help to ensure that we continue to make a positive contribution to the regional and national economy."

Tony Fountain, Managing Director, Essar Energy Transition, commented: "Adrian's appointment is a significant step in our transition to a low carbon future. We are committed to establishing a leading low carbon energy transition hub and, alongside the agreement to purchase Thornton Science Park, this appointment demonstrates our plan to playing our part to ensure that the UK delivers on its climate change goals, enhances energy security, and maintains a

strong, secure manufacturing base for fuels."

Talking about his new role, Adrian Curry added: "I am thrilled to join EET Fuels and contribute to the Company's sustainable future. The Company's commitment to decarbonisation is incredible. It fully aligns with my passion for driving growth and innovation while reducing carbon emissions. I look forward to working with the team to achieve our goals."

Long-term growth objectives



EET has also appointed Ruth Herbert as Managing Director, Business Development and Strategic Initiatives to support long-term growth objectives.

Ruth will lead the development and execution of strategic initiatives to support EET's long-term growth objectives and ensuring that the company's initiatives are in line with the evolving energy landscape.

Energy industry experience

Ruth brings with her over 15 years of energy industry experience, most recently as Chief Executive of the Carbon Capture and Storage Association, where she helped to shape government policy and fostered partnerships that significantly advanced the industry's progress.

Ruth has extensive UK Government experience, previously holding several key positions at the Department of Energy and Climate Change, where she played a pivotal

role in the UK's energy policy, including leading negotiations on the EU Directive on CO2 Storage, international CCUS, and policy coordination, stakeholder engagement and programme management for the UK's Electricity Market Reform. She has been a member of the UK Government's CCUS Council and its Industrial Decarbonisation Challenge Advisory Council, as well as the UKCCSRC Advisory Council.

She has also served as Director of Strategy and Development at the Low Carbon Contracts Company, where she was responsible for shaping the company's strategic direction, developing its business plans, managing government affairs, and leading external communications.

Net zero goals

Tony Fountain, Managing Director, EET, said: "We are very excited to have Ruth onboard at EET. Through our hydrogen production and decarbonisation projects at Stanlow, we are fully focused on assisting the UK Government to deliver its net zero goals. Ruth's strong track record of leadership in both decarbonisation policy and practical implementation regimes will be instrumental as we progress our strategic initiatives."

Ruth Herbert added: "I look forward to joining at such a pivotal time for EET, and for the sector as a whole. EET's plans present a huge opportunity for the UK's North-West to be a trailblazer in the net zero industries of the future and for EET to be at the forefront of the emerging low carbon products market. I'm looking forward to working with the EET team to achieve its long-term objectives and make these ambitions a reality."

Aggreko targets growth of energy transition partnerships with new appointment



Aggreko has strengthened its provision of energy transition solutions with the appointment of a new managing director for the UK and Ireland.

Aiming to address specific-sector and regional challenges for customers, Alan Dunne has been appointed to spearhead Aggreko's growth strategy and innovation in the region.

Strategic partnerships

Bringing 30 years of commercial

experience to the role, Dunne first joined Aggreko in 2014, working in both operational and commercial leadership roles across Europe and North America. He is set to develop strategic partnerships with customers in the region to provide flexible energy solutions.

Dunne said: "I am excited to bring my commercial experience to drive Aggreko's growth strategy. Following conversations and input from customers, I am acutely aware of the challenges the energy transition presents and that each customer's challenges and priorities require a different solution.

"With further investments planned, this is an exciting time for Aggreko, and I am delighted to lead our continued innovation across sectors in the UK and Ireland."

THE LATEST UPDATES FROM OUR DISTRIBUTOR COMMUNITY

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Highland Fuels – TruckNess sponsorship

Highland Fuels, the Inverness-based distributor, is delighted to have sponsored TruckNess 2024! TruckNess is a festival that celebrates the contribution of the men and women working in the haulage industry in North Scotland. The festival also raises money for the charity, Cash for Kids North Scotland.

Stephen Rhodes, Managing Director, said: “We were absolutely delighted to support TruckNess; we are the main sponsor of this wonderful community based charitable event that showcases the importance of the haulage industry throughout the North of Scotland.

“It was great to be able to connect with so many haulage businesses



and members of the community – and, most importantly, raise vital funds for Cash for Kids which is a grant-giving charity helping disadvantaged children who need it most across North Scotland.

“Cash for Kids supports those who are affected by poverty, illness, neglect or have additional needs with grants going directly to families, community organisations and local charities who provide support to those who often have nowhere else to go.

“Additionally, we extended our involvement at Truckness to also make it a Highland Fuels Family Day where we hosted a BBQ which provided a great chance to unwind with family and friends, enjoy some food and drinks, and celebrate our participation in a truly unique setting.”



LCM – ‘Born Survivor’ obstacle challenge success!

LCM, the Lancashire-based, fuel, energy, and infrastructure specialist, is proud to announce that the team successfully completed the ‘Born

Survivor’ obstacle challenge in support of ANDYSMANCLUB. The charity provides a safe space for men to talk about their mental health.

Richard Wallace, Managing Director, said: “LCM has experienced remarkable growth and transformation over the past year, a testament to the exceptional team we’ve assembled. It was our team’s collective decision to support ANDYSMANCLUB in this year’s ‘Born Survivor’ event.

“In our industry, we often encounter strong, seemingly invincible men. It’s inspiring to support a charity that recognises the importance of talking about mental health. Mental health has always been a cornerstone of our company culture, and we’re committed to upholding the highest standards in this area. We encourage everyone to join us in supporting ANDYSMANCLUB and breaking down the barriers that prevent people from seeking help.”

If you would like to contribute to their fundraising efforts then please visit: <https://www.justgiving.com/team/lcm-born-survivor>



Rix – Successful completion of ‘It’s a Knockout’ Challenge!

Rix Petroleum recently participated in the annual ‘It’s a Knockout’ challenge in support of Dove House Hospice, marking the seventh time the company has taken part in this event.



The challenge, which brings together teams for a day of fun and competition, has become a highlight of the year for the Rix Petroleum team. Their continued involvement reflects the company’s ongoing commitment to supporting community causes.

Dave Rowland, Transport Manager at Rix Petroleum, said: “The team’s enthusiasm and dedication resulted in a fundraising total of over £1,500 for the hospice, a local charity providing care for people with life-limiting illnesses.

“Our team had an incredible day taking part in the ‘It’s a Knockout’ challenge. The teamwork was amazing, with everyone coming together to give their all in each activity. To top it off, raising important funds for such a worthy cause like Dove House Hospice makes the whole experience even more rewarding.”

Nolan Oils – Oxfordshire County Show support

Nolan Oils, the Bicester-based fuel distributor, is always keen to support and help their local community. They have recently sponsored the Oxfordshire Young Farmers County Show and Rally. The event was a great success, and plans are already in progress for the next County Show in 2025!

To thank Nolan Oils for their support and sponsorship of the event, the Oxfordshire Young Farmers presented them with a certificate of appreciation.

Luke Nolan, Sales Director, said: “The day was a tremendous success. To raise £38,000 was an amazing achievement. We always support our local farmers. We hope the day helped to showcase the Young Farmers and the rural community to a wide audience.”

CERTIFICATE OF THANKS TO



Halso UK Fuels and EL-Oils – Summer Fun Day 2024 is a big hit!

Halso UK Fuels and EL-Oils, the Staffordshire-based distributors, hosted their Summer Fun Day at the end of August.

Emma Osborn, Managing Director, explained more about the event: “On 31st August, Halso UK Fuels and EL-Oils hosted a fantastic Summer BBQ Fun Day filled with laughter, sunshine and great company. Family, friends, colleagues and customers all came together to enjoy a day of delicious food, vibrant activities, and plenty of sparkle!



“Guests were treated to a sparkle station for glitter makeup and colourful hair braids, adding extra flair to the day. Our ‘Pimp Your Prosecco’ stand was a hit, offering an array of fresh fruits and Bellini toppers to make each glass a little more exciting. The BBQ spread was delicious offering veggie options while great music helped set the perfect vibe for the day.

“We even brought out some friendly competition with a few rounds of beer pong, adding to the fun and laughter. And let’s not forget our furry friends, who happily indulged in the BBQ treats too. It was a day to remember, full of warmth, fun, and smiles!”

“It was incredible to see everyone come together to celebrate a wonderful day filled with fun, food and great company,” Emma concluded. “Events like these remind us of the special bond we share with our team, customers, and their families. We can’t wait to do it all again!”

CDS – Jon Bishop celebrates 10 years with the business

CDS the innovative software, technical support, and customer service business, is proudly celebrating Jon Bishop, Operations Director, who has recently completed 10 years working with CDS.

Graeme Lea, Managing Director at CDS, said: “A team player, hard-working family man and all-round good guy, Jon is a fantastic asset to CDS. With 10 years in the business under his belt, Jon’s expertise and commitment have played a vital part in the company’s continuing success. Congratulations on your first decade with us Jon!”

Jon added: “What a decade it’s been! I joined CDS as a Project Manager back in 2014, spending time managing most teams at one point or another on the journey to becoming Operations Director. During that time, we have seen 19 new distributors join us and taken on the task of building the next generation of CODAS which is progressing at pace now. I am very proud to be part of such a successful company.

“(Oh, and just a minor matter on a personal front: the two girls in the picture turned up too!)”

Congratulations from Fuel Oil News on such a busy and productive 10 years Jon!





TRANSITION TALK

A just transition for Grangemouth? Mystery buyer has ambition for ‘business as usual’, while Governments explore routes to a greener future

Grangemouth, one of six oil refineries in the UK, is the oldest and the last one in Scotland, supplying around 65% of Scotland’s oil products.

In a September statement, site owner Petroineos confirmed plans, first shared in October 2023, to cease production in the second quarter of 2025, with the loss of all but 75 of the 475 jobs at the site.

The decision has come on the back of the plant haemorrhaging cash, to the tune of millions of pounds over the last decade, and its inability to compete with newer refineries in Africa, Asia and the Middle East. In the week leading up to the announcement Grangemouth has been accruing average daily losses of 500,000 US dollars (£380,000).

Responding to the announcement, Scotland First Minister John Swinney said it would create a “significant economic shock” as the Scottish and UK governments promised a joint £100m support package for Grangemouth.

However, Scottish energy secretary Gillian Martin was unable to say how many jobs the investment would likely save but claims to be “confident” saying: “They are a highly skilled, highly experienced workforce who have the skills that could be transitioned into making biofuels, into making hydrogen and, of course, running the import terminal.

“I am confident that those highly skilled people will find other work.”

There is an increasingly urgent need to deliver a full transition from fossil fuel production to sustainable alternatives, but this cannot be at the expense of the workforce.

Neither can there be a cessation in UK production of fossil fuels, only to replace the lost production with imports. It is neither just, nor an effective transition, to import carbon and export jobs.

A just transition away from fossil fuels means moving to a more sustainable economy in a way that’s fair to everyone – including those working in transitioning industries. But if the transition is driven by profitability, then it will be, inevitably, the workforce that pays the ultimate price. This would be an unjust transition.

Status quo

Following September’s announcement, SNP MSP Michelle Thomson, MSP for Falkirk East, claimed she has been in discussion with a ‘serious prospective buyer’ who would keep the site as an oil refinery.

“Wary” of talk of a potential buyer, Gillian Martin commented: “I think one of the things that I’m slightly wary of is the fact that Petroineos actually said around late November last year that their intention was to close the refinery in its current form and turn it into an import terminal.”

“I would have imagined that if anyone was interested in taking over the refinery, that would have been the key point to get in touch.”

Michelle Thomas would not name the prospective buyer, having signed a non-disclosure agreement (NDA), but believes the North-American buyer “to be serious, with an appetite and a willingness to buy the Grangemouth refinery in its entirety including its jobs.”

Confirming that the purchase would be funded by the buyers own resources, rather than requiring government support, the MSP said she hoped the international buyer could meet with John Swinney and Petroineos to discuss a potential deal.

No promises

Thomson suggested that talks had been ongoing for a while, and added: “We shall see, but being quite clear, there’s some way to travel.

“These things are very complex. There’s lots of moving parts in terms of business plan and funding and so on. I am not making any promises. I am merely saying that there are options and I am duty-bound to pursue all options and that is what I’ll do.”

Following her initial comments, Thomson raised the offer with John Swinney during First Minister’s Questions with Swinney saying he would be “very happy” to open discussions with a potential buyer.

Energy transition impacts

Due to its size and configuration, Grangemouth

incurs high levels of capital expenditure each year just to maintain its licence to operate. This annual outlay on essential planned maintenance and running repairs has been consistently higher than the company’s earnings over the past decade.

Petroineos is a joint venture between INEOS and PetroChina who have invested more than \$1.2bn since 2011 to maintain the refinery’s safe operation, recording losses in excess of \$775m during the same period.

Frank Demay, Chief Executive Officer at Petroineos Refining, said: “The energy transition is happening now and it is happening here. Demand for key fuels we produce at Grangemouth has already started to decline and, with a ban on new petrol and diesel cars due to come into force within the next decade, we foresee that the market for those fuels will shrink further. That reality, aligned with the cost of maintaining a refinery built half a century ago, means we are exploring ways to adapt our business.

“The action we are taking to create an import terminal will safeguard fuel supply for Scotland. We currently expect Grangemouth to be ready to operate as a national distribution hub for finished fuels in Q2 next year.

“Unfortunately, a terminal would require only around one-fifth of the current refinery workforce. Therefore we will soon enter an information and consultation process with representatives of our employees to discuss the proposals. We have already agreed to move from the UK statutory minimum redundancy terms to an 18-month package and if plans proceed we intend to do everything we can to reduce the impact on our people. We will of course be seeking to minimise compulsory redundancies as far as possible.”

Wakeup call

Responding to the announcement, UK energy secretary Ed Miliband said the move is “deeply disappointing” with the Unite union branding it an “act of industrial vandalism, pure and simple”.

Elizabeth de Jong, Chief Executive Officer of Fuels Industry UK said: “We are very sad to



hear that Grangemouth refinery is planning to become a fuels' import terminal.

"As we have told Government, the fuels sector is vital for the nation's energy security and net zero ambitions, but faces difficult investment conditions in the UK, as this decision shows. Today's announcement must be a wake-up call for Government to work more closely with us and our member companies to address the long-term challenges facing the sector."

Grangemouth complex

There are three different businesses at the Grangemouth site, which spans 1,700 acres and is Scotland's largest industrial complex, employing around 2,000 people in total:

- The oil refinery: operated by Petroineos, a 50/50 joint venture between PetroChina and INEOS, employing c.475 people.
- The petrochemicals plant: an INEOS business employing c.1,000 people.
- The Forties Pipeline System: another INEOS business which employs c.500 people, transporting 300,000 barrels of crude oil per day from 85 North Sea fields. The pipeline also facilitates approx. 30% of the UK natural gas supply.

The wider Grangemouth complex also hosts some 2,000-5,000 contractors each day.

Business as usual for INEOS

Following the announcement, INEOS moved quickly to issue reassurances regarding the two other businesses located on the wider Grangemouth complex:

"INEOS O&P UK and INEOS FPS (Forties Pipeline System), will continue as normal and are largely unaffected by this change. We wish to assure our customers, suppliers and other stakeholders that it is "business as usual" for the INEOS businesses at Grangemouth.

"INEOS Grangemouth remains committed to a long term successful future for the site which includes the commitment to deliver net zero by 2045."

Fears for Grangemouth future

June Wyper, a Grangemouth resident with family and friends who have worked, and still work, at INEOS, in Grangemouth, spoke with Fuel Oil News to share her intense disappointment with the decision and her fears for the area.

"With the loss of 400 jobs, I do not take any comfort that two of the INEOS businesses are unaffected. This will have a detrimental

effect on families involved, local businesses and the town of Grangemouth."

Echoing concerns over the need to address investment in the industry, June continued: "I believe the responsibility lies with Jim Ratcliffe and the Scottish Government who could have invested in Grangemouth Refinery over a period of 5 years, therefore saving jobs and the future of Scotland's refinery. I believe the UK Government could have intervened.

"As a wife, mother and grandmother I am nervous for the future of Grangemouth; INEOS is a major employer in the area. Grangemouth used to be a thriving town but, like other towns, has seen such a detrimental effect on shops, living standards, jobs and local services brought on by austerity and the cost-of-living crisis. Community services have taken a big hit, with more cuts to come, and I fear for the future of our young people as there is nothing to keep them in Grangemouth.

"The town will suffer with the closure of the Grangemouth Refinery. This will hurt the local economy badly; flat rentals, local hotels, local shops etc. which the workforce of INEOS all contribute to."

THE ROAD TO NET ZERO CANNOT BE PAID FOR WITH WORKERS' JOBS

Fight for jobs

Also highlighting the potential wider impact of the closure, UK union, Unite, which represents 500 workers at the site, has vowed to explore all avenues to preserve high quality jobs at Grangemouth.

The union says the plans place the jobs of those employed directly at Grangemouth in jeopardy, but could also impact thousands more in the supply chain.

Highlighting "widespread fury within the workplace due to the failure of the bosses and politicians to ensure the future of the site", Unite general secretary Sharon Graham said: "This is an act of industrial vandalism, pure and simple.

"This dedicated workforce has been let down by PetroIneos and by the politicians in Westminster and Holyrood who have failed to guarantee production until alternative jobs are in place.

"This is now the last chance for this Labour

government to show whether it's really on the side of workers and communities. The road to net zero cannot be paid for with workers' jobs. This is the only refinery left in Scotland, and it must remain. There are alternative plans.

"This is yet another example of workers paying for a crisis they did not create while billionaire owners laugh all the way to the bank."

Pivot to low carbon

Unite is now in high level talks with the government about alternatives for the site, including the production of sustainable aviation fuel (SAF).

Derek Thomson, Unite Scottish Secretary said: "The sole objective for Unite remains that the jobs at the refinery, and thousands more in the supply chain, are protected by any means. The governments involved cannot simply hide behind the convenient smokescreen that this is a commercial decision which they couldn't influence."

While preparing the refinery site for the transition to an import terminal, Petroineos is simultaneously working with UK and Scottish governments to analyse options for Grangemouth to become a low-carbon fuels manufacturing hub.

Next year's closure has accelerated efforts to plot a pathway for a green future for Grangemouth.

An initial feasibility study, 'Project Willow', funded equally by the Scottish Government and UK Government, is assessing various low-carbon opportunities from technical, economic, commercial, regulatory, environment, community and skills perspectives.

The initial research phase is complete, with shortlisted options for development including, but not limited to, Sustainable Aviation Fuel (SAF), low-carbon hydrogen and related products, and eFuels. The project team has entered the second phase of research, comprising a detailed assessment of the viability of each shortlisted option.

By Spring 2025, the project aims to have identified commercially viable opportunities to develop low-carbon fuels that would underpin government commitments to net zero transition, maximise local employment, and contribute to long-term sustainable energy and fuel security in Scotland and the UK.

Delivering these opportunities may yet deliver a just transition – but is it all coming too late for the people of Grangemouth?

A DAY IN THE LIFE...

Jack Popplewell

WELCOME TO OUR FEATURE WHERE PEOPLE FROM MANY DIFFERENT ROLES IN THIS INDUSTRY WILL TAKE YOU THROUGH A TYPICAL DAY IN THEIR WORKING LIFE.

THIS MONTH, A DAY IN THE LIFE FEATURES A TANKER DRIVER AGED JUST 22! FUEL OIL NEWS SPEAKS WITH JACK POPPLEWELL, TANKER DRIVER FOR DICE FUELS, AND RUNNER-UP OF THE YOUNG PERSON OF THE YEAR IN THE 2024 UKIFDA ANNUAL AWARDS, TO DISCOVER HOW JACK SPENDS A TYPICAL DAY.



Jamie Popplewell, Director at Dice Fuels and Jack's father, added additional insight into Jack's career to date: "There will be a few raised eyebrows when we say we have a fully qualified ADR driver at just 22 years old, people might ask is that a bit young? But, of course, we all have to start somewhere in the industry."

Jack has the advantage of working for Dice Fuels Ltd, in Aylesford, Kent, a business owned and operated by his father and stepmother Sally. Jack is one of four drivers working within the business, with his stepbrother, James, driving our largest rigid tanker.

"Sally has been in the industry for nearly 20 years, and I oversee the transport side of the business and keep the drivers in check. Jack started working for the company when he was 19 years old. At that time, he was driving the rural delivery van we had from Just Tankers, it was a bespoke vehicle professionally built with a 900 L ADR tank, meter and equipment squeezed into the back.

"He spent three years on the van doing small emergency deliveries anything from 250L up to 900L, and in that time he built up some valuable experience to carry him forward with a career and a move onto the tankers. It's been wonderful to see Jack out on the tanker. He is an asset to the business."

Jack shares his typical day with us

My alarm goes off at... 4:30am

The first thing I do is... Cuddle our dog Pablo and run the shower.

I prepare for the day ahead by... Preparing my delivery route the night before and knowing exactly where I am going first and what time I should be expecting to arrive at that delivery point.



I can't leave the house without... A pack of Haribo, and saying goodbye to my dog and my partner Holly.

My typical day – I always try and leave my house at 5:15am, aiming to get to our families yard for 5:45am.

I spend 30 minutes warming up my truck, doing my checks and making sure everything is in order for the day ahead.

Once this is complete, I can head out onto the open road heading towards my first delivery point. Arriving at my first delivery point between 7 and 7:30am. After doing a few deliveries, I



usually find a quiet layby to take a 15-minute taco break, this usually consists of eating some fruit and reading a book.

After a few more hours, and more deliveries, it's time for lunch and I find another quiet place to stop for my 30-minute taco break. After eating my delicious lunch I spend the final minutes of my break catching up with my partner and seeing how her day is going.

As my break ends, I spend a few minutes checking my final delivery points of the day. After finishing my deliveries I then head back to the yard arriving between 3 and 5pm, park my lorry up and refuel it for the next working day. This gives me a head start for the morning. Finally, I reverse my lorry into its parking spot. Before leaving, I check around my vehicle once again to make sure that I'm not going to have any unexpected surprises the following morning.

My most memorable work moment is... the day I found out I was UKIFDA runner-up in the young person award, as I was delivering to one of our regular customers when I first found out.

The worst part of my job... I couldn't pinpoint a part of my job that is the worst. My job is fulfilling and challenging and keeps me on the ball, I wouldn't change it.

Best part of my job is... Interacting with customers! I love to meet



new and interesting people every day. Every job is different!

I relax after work by... usually walking my dog; it's nice to get out into the fresh air and just relax after being in the truck for the day.

My favourite meal is... My lunch; my partner makes me a smashing lunch every day of the week (thanks Holly)

On my bedside table is... My phone charger, alarm clock, wallet and Rubix cube.

The last thing I do each day is... Set my alarms for the next morning.

I'm normally in bed by... 9 pm

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Lynx Fuels: growth underpinned by greatness

LYNX FUELS IS A GROWING, INDEPENDENT, FUEL DISTRIBUTION BUSINESS BASED IN THE NORTH OF ENGLAND. THE BUSINESS HAS RECENTLY OPENED A NEW DEPOT IN JARROW, TYNE AND WEAR, AND HAS PLANS FOR FURTHER EXPANSION.

CLAUDIA WEEKS, COMMUNITY CONTENT LEAD FOR FUEL OIL NEWS, SPOKE WITH **ADRIAN HANCOX**, HEAD OF LYNX FUELS, TO FIND OUT MORE ABOUT THE NEW OPENING AND THE FUTURE OF THE BUSINESS.

Life in the fuel industry

"I joined the downstream fuel industry over twelve years ago," Adrian began, explaining his background and how he arrived in his current role as Head of Lynx Fuels.

"I began life as a management trainee and sales executive, working in sales and learning how to run an operational depot. A few years into my career I then passed my Management CPC and worked my way up to the role of depot manager.

"From 2019-2023, I was a regional manager covering a vast area of the UK and I was involved in many projects including mergers and acquisitions. I then took up the post of Head of Lynx Fuels, in December 2023. I'm also proud to say that I have recently completed my Master's in Business Administration (MBA) at Staffordshire University too!"

The background of the business

"Since the business was founded in 2015, it has been built on offering a quality service to customers," Adrian shared, explaining how excellent customer service is at the heart of Lynx Fuels. "Service matters throughout the whole business, our customer service team, our drivers, the accounts team, the finance department, general management – we all know how important and vital good service is.

"In the early days of the business, we had just two or three drivers and a small amount of office support. We now have four established depots and multiple ex-rack locations so, as we have grown, the number of support staff we have has also grown, yet we still have the same ethos. We all know how much customer service matters.

"To ensure our service levels maintain an exceptionally high standard, we have also

just ordered two more tankers, taking us up to twenty tankers in total by the end of the year. We plan to continue to grow.

"We feel that it's important to align our ambitious strategy with great people, and Lynx Fuels has a fantastic team and culture; it's something I am extremely proud to be part of."

A new depot

Lynx Fuels recently opened a new Jarrow Depot and Adrian shared more about the expansion: "The Jarrow Depot is a milestone for Lynx as a business. We have a strong plan for growth over the next few years, and this further complements our Northeast reach."

Lynx Fuels currently covers North Yorkshire, the Northeast and Lincolnshire. Claudia was keen to know whether Lynx Fuels has plans for further expansion of current sites or acquisition of other depots. "The short answer is yes,"

Adrian began, honestly. “It comes down to customer demand and strategic growth. We have opened one site, and have two or hopefully three new depots in the pipeline for the near future.

“We want to stay true to our values: to be local, friendly and reliable. Having a friendly, dedicated team, local to the customers we are talking to, and ensuring all customers get deliveries when they want them.”

Problem solving, implementing change and customer satisfaction

Adrian was clear about what he enjoys most about working in the industry: “I have loved my time in the industry over the years. Problem solving, implementing successful change and customer satisfaction are the highlights of my role and why I do what I do.

“I think my favourite part of my current role has been playing a small part in the team’s development, and watching great, talented individuals grow in their careers. The success of Lynx Fuels is down to the team.

“The business is in excellent shape, and I’m proud of what the team have achieved. I am here to help grow and support the business, but the day-to-day recognition belongs to the staff in the office and on the road. The business is successful because of their hard work and determination.”

The customer

Claudia asked Adrian why customers choose Lynx Fuels as their supplier: “The Lynx Fuels team endeavour to do their very best for their customers. We know that communication is key, both internally and externally, for the optimum customer experience.

“When you look at the positive feedback we get, it’s being able to offer customers what they want, when they want it, even communicating and supporting when things don’t go to plan.”

The future of the industry

Claudia asked Adrian for his thoughts on the future of the industry: “The obvious challenge for the domestic market remains heat pumps as we look to decarbonise and work towards net zero.

“I do think that HVO could be an excellent solution, and the important thing is that we have a solution to offer. My own house runs on HVO! It’s proven to work with minimal cost and disruption.

“I have worked alongside UKIFDA, met with MPs and enjoyed the experience of going to the Houses of Parliament. I believe



that the use of HVO will be critical for the domestic market. I look forward to the next developments from Ken Cronin and the team.

“Commercially, I believe HVO (or, as I see it, renewable diesel (RD)) will continue to grow. HVO is one type of renewable diesel and technology advancements will, in my opinion, lead to other options of renewable fuel.

“I believe that, one day, RD will be available at all pumps in the UK. It’s still in its infancy, but many large forecourts/service

stations have installed, or are looking to install, HVO.”

Growth underpinned by great people

Reflecting on his time in the industry, Adrian concluded: “I have received many pieces of advice over the years. For me, the best advice has always come down to the importance of working with fantastic people and creating a collaborative and supportive environment. I try not to overcomplicate what we do, and use data to support and enhance our future.

“The vision remains growth underpinned by great people. We want to be the best we can be, and I look forward to watching the business grow and develop.”

Fuel Oil News wishes Adrian and the team at Lynx Fuels all the best for their new depot and looks forward to catching up with them again in the future.



UKIFDA Databank: industry data update

About

UKIFDA's databank brings together recently published government and other third-party data concerning the distribution of liquid fuels in the UK. In this edition, we concentrate on detailed monthly energy consumption data to the end of June 2024. Kerosene sales are shown as total kerosene sales (with a detailed split between domestic and commercial scheduled for the next update).

Where comments are made regarding comparative differences, they are UKIFDA comments borne from conversations with third parties. Prior year period data has been updated by the Government and may, therefore, differ from previous UKIFDA reports.

Domestic energy consumption summary

The number of heating days in the first half of 2024 was 6% below 2023 and 11% below 2019, primarily as a result of the 3 months March to May 2024 being the warmest recorded in the series this century.

Domestic gas and electricity sales were broadly flat compared to 2023, despite a 22% reduction in the energy price cap. However, sales are significantly below the pre-pandemic period with reductions of 14% and 10%.

Total kerosene sales for the first half of 2024 were slightly below 2023 (-3%) but with a smaller decrease on 2019 (-5%) compared to gas and electricity.

In the three months to June 2024, total deliveries of petroleum products were down by 0.6% compared to the same period in 2023. Jet fuel demand continues its recovery, up by 8.1%, but remains 4.1% down on the same period in 2019 (pre-pandemic). June 2024 marked the highest monthly jet fuel demand seen since September 2019.

Petrol demand saw an increase of 2.3%, while diesel remained

relatively stable, down by 0.3%. Petrol deliveries remain at about half the total volume of diesel.

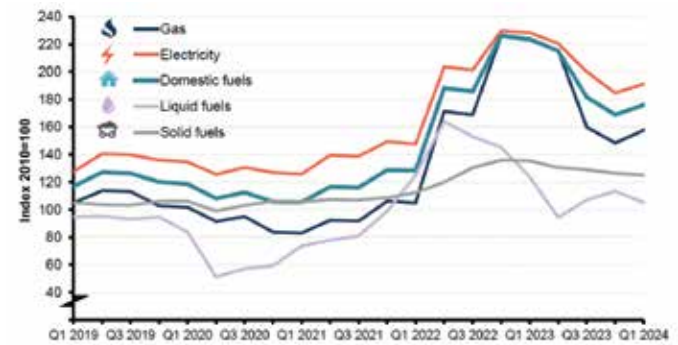
Comparison of domestic energy prices

The chart below from the ONS shows quarterly changes in the domestic sector price indices (in real terms) over the past 5 years. Real term trends present changes in prices accounting for overall inflation.

The price paid for electricity in calendar year quarter 1 (January to March) 2024 (in real terms and including VAT) increased by 3.5% when compared to the previous quarter (quarter 4 2023). Between quarter 4 2023 and quarter 1 2024, the real terms prices for gas increased by 6.2%.

When comparing quarter 1 2024 with quarter 1 2023, the price paid for electricity decreased by 16% and gas decreased 29%.

Liquid fuels comprise domestic kerosene and similar heating oils. The price of liquid fuels between quarter 4 2023 and quarter 1 2024 decreased 7.3%, and in real terms, the price of liquid fuels in quarter 1 2024 was 15% lower than the price in quarter 1 2023.



Domestic energy consumption summary

First half 2024 (January to June)	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
Heating days	39.9	36.2	45.7	36.5	38.0	35.6	-11%	-6%
Kerosene sales (Ktoe)	1,636	2,118	1,934	1,477	1,606	1,552	-5%	-3%
Domestic gas sales (GWh)	169,167	162,928	203,279	161,030	143,365	145,050	-14%	1%
Domestic electricity sales (TWh)	53.0	53.6	56.8	49.9	47.1	47.5	-10%	1%
Average kerosene price (ppl)	52.8	40.5	46.7	91.0	72.4	68.6	30%	-5%
Average energy price cap (£)	1,106	1,081	1,085	1,673	2,500	1,949	76%	-22%

Temperature and heating days

	Average temperatures					Average heating degree days				
	30-year mean	2019	2022	2023	2024	30-year mean	2019	2022	2023	2024
January	4.9	4.2	5.2	5.3	5.0	10.6	11.3	10.3	10.2	10.5
February	5.2	6.9	6.8	6.6	7.6	10.3	8.6	8.7	8.9	7.9
March	6.8	7.9	7.7	7.0	7.9	8.7	7.6	7.8	8.5	7.6
April	9.0	9.1	9.1	8.6	9.5	6.6	6.4	6.4	6.9	6.0
May	11.8	11.2	13.0	12.6	13.8	3.9	4.3	2.5	2.9	1.8
June	14.6	14.3	15.1	16.8	14.3	1.7	1.6	0.9	0.6	0.5



Temperature and heating days

February 2024 was the warmest February recorded in the series since February 1998. The 3 months from March to May 2024 were the warmest for the period recorded in the series this century. The average number of HDDs was 5.1, 0.9 lower than the same period a year earlier. In July the daily average temperature was 16.2 degrees Celsius, 0.1 degrees Celsius lower than the same month in 2023 and 0.5 degrees Celsius lower than the long-term mean.

Heating oil

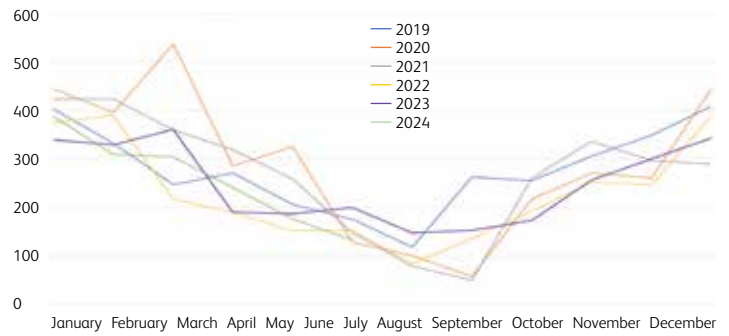
Total consumption (ktoe)

In the first half, total kerosene sales (domestic and commercial) were 3% below 2023 and 5% below 2019. However, sales patterns were erratic. January 2024 consumption was 14% ahead of 2023 but still 4% below 2019. These gains were reversed in February and March with warmer weather and higher prices, with April showing gains but June falling back again.

Pricing

Heating oil prices in July 2024 were 66.2 ppl compared to 63 ppl in April 2023 but significantly below prices post the onset of the Ukraine conflict (104.4ppl)

Overall kerosene consumption 2019-2024



ONS Heating oil price (ppl)



Total heating oil consumption (ktoe)

	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
January	403	445	424	375	339	387	-4%	14%
February	333	396	424	390	329	310	-7%	-6%
March	247	538	360	217	361	304	23%	-16%
April	271	286	319	190	190	241	-11%	27%
May	206	326	259	152	187	176	-14%	-5%
June	175	128	148	152	200	133	-24%	-34%
First half	1,636	2,118	1,934	1,477	1,606	1,552	-5%	-3%
Total year	3,336	3,469	3,246	2,774	2,979			
Year on year change		4%	-6%	-15%	7%			
Change from 2019		4%	-3%	-17%	-11%			

Gas oil and DERV

Gas oil Consumption (ktoe)

Gas oil consumption in the first half of 2024 showed a further decline following the change of rules.

Deriv consumption

Road diesel sales have still not quite recovered from 2019 and are still erratic.

Gas oil consumption (ktoe)

	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
January	387	249	310	323	126	150	-61%	19%
February	334	201	309	309	113	126	-62%	12%
March	331	331	363	300	257	164	-50%	-36%
April	560	277	452	253	167	158	-72%	-5%
May	551	307	405	135	188	155	-72%	-18%
June	363	419	416	246	181	136	-63%	-25%
First half	2,526	1,783	2,255	1,566	1,032	889	-65%	-14%
Total year	5,171	4,531	4,841	2,975	2,185			
Year on year change		-12%	7%	-39%	-27%			

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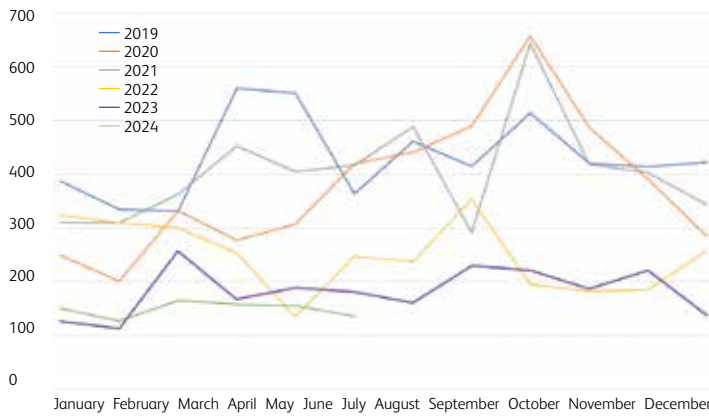
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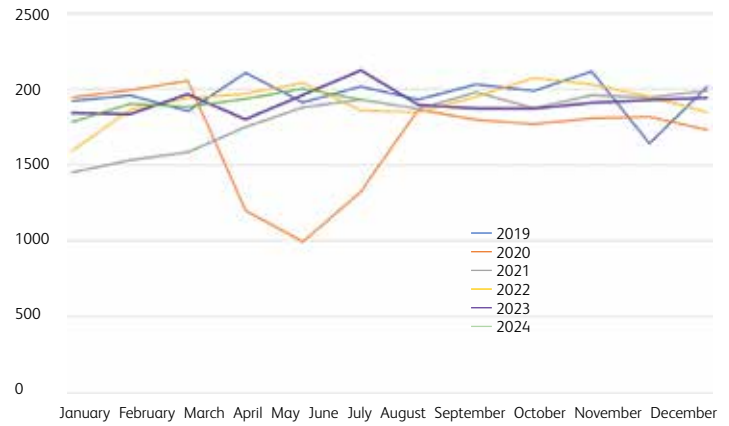




Gas oil consumption 2019-2024 (KTOE)



Road diesel consumption 2019-2024 (ktoe)



Deriv consumption

	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
January	1,921	1,944	1,449	1,592	1,840	1,784	-7%	-3%
February	1,959	1,991	1,532	1,863	1,831	1,901	-3%	4%
March	1,852	2,052	1,585	1,939	1,965	1,881	2%	-4%
April	2,107	1,199	1,750	1,967	1,801	1,937	-8%	8%
May	1,913	993	1,878	2,039	1,962	2,002	5%	2%
June	2,017	1,320	1,928	1,860	2,123	1,930	-4%	-9%
First half	11,770	9,500	10,122	11,259	11,523	11,435	-3%	-1%
Total year	23,490	20,283	21,728	22,949	22,938			
Year on year change		-14%	7%	6%	0%			
Change from 2019		-14%	-8%	-2%	-2%			

Domestic gas consumption

Domestic gas consumption

GWh	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
Q1	117,166	117,391	138,008	114,134	103,353	104,183	-11%	1%
Q2	52,000	45,536	65,271	46,896	40,011	40,868	-21%	2%
Q3	20,033	27,828	22,971	19,856	16,718			
Q4	103,229	109,450	92,547	78,205	77,017			
Total	292,429	300,206	318,796	259,091	237,100			
Year on Year Change		3%	6%	-19%	-8%			
Change on 2019		3%	9%	-11%	-19%			

Domestic electricity consumption

Domestic electricity consumption

TWh	2019	2020	2021	2022	2023	2024	2024 vs 2019	2024 vs 2023
Q1	30.18	30.29	32.31	28.66	26.85	27.25	-10%	1%
Q2	22.83	23.27	24.51	21.26	20.23	20.26	-11%	0%
Q3	20.16	21.11	19.84	18.62	18.13			
Q4	29.25	31.27	28.54	25.01	25.18			
Total	102.42	105.94	105.20	93.54	90.40			
Year on year change		3%	-1%	-11%	-3%			
Change on 2019		3%	3%	-9%	-12%			



Boiler Upgrade Scheme (BUS)

The BUS was launched in England and Wales on 1 April 2022, with an approved £450 million funding up until 2025 and is being administered by Ofgem.

The BUS aims to incentivise and increase the deployment of low carbon heating technologies by providing an upfront capital grant towards the cost of the installation of an air source heat pump (ASHP), a ground source heat pump (GSHP) and, in limited circumstances, a biomass boiler.

Grants for ASHPs were increased in October 2023 from £5,000 to £7,500.

The total number of applications in July 2024 saw a 13% increase on the previous month and was double the volume received during the same month of the previous year. Aside from the immediate aftermath of the grant uplift in October 2023, it has been the highest month for applications since the scheme began.

The regional breakdown for grants paid continued to be broadly similar to previous months. Of the total number of grants paid, the largest number were for installations at properties in the South East (20%),

Fuel type displaced	Air source heat pumps May 22 to July 24	
Gas	14,654	50%
Oil	5,632	19%
None	4,696	16%
Direct electric	2,792	10%
Liquefied Petroleum Gas (LPG)	884	3%
Coal	334	1%
Other	230	1%
Unknown	29	0%
Total	29,251	100%

Measure	Air Source Heat Pumps
Mean cost of installation (£)	13,253
Median cost of installation (£)	13,050
Lower quartile cost of installation (£)	10,827
Upper quartile cost of installation (£)	15,566

followed by the South West (19%). The fewest number of grants were allocated in the North East region (3%). Wales accounted for 5% of the total.

The largest proportion (49%) replaced gas systems, followed by oil (20%) and then properties that did not previously have a heating system at all (17%). Of all grants paid on the scheme so far, the majority have been towards installations at properties in rural areas (56%). The majority of properties in receipt of grants were also on the gas grid (56%).

The median cost of an ASHP has been £13,050 (including the grant value).

Country or Region	Heat pump technologies	
North East	753	3%
North West	2,153	8%
Yorkshire and The Humber	2,804	10%
East Midlands	2,882	10%
West Midlands	2,165	8%
East	3,776	13%
London	1,418	5%
South East	5,615	20%
South West	5,308	19%
Wales	1,485	5%



The future of fleets: A focus on LNG



FOLLOWING OUR RECENT CONSIDERATION OF THE POTENTIAL ROLE FOR LNG IN THE GLOBAL ENERGY TRANSITION (SEPTEMBER ISSUE FUEL OIL NEWS), **LISE-LOTTE NORDHOLM**, VICE PRESIDENT AND GENERAL MANAGER OF CLEAN ENERGY AND GLOBAL PLATFORMS AT DFS, SPOKE WITH FUEL OIL NEWS TO EXPLAIN THE THINKING BEHIND HER VIEW THAT LNG CAN POSITIVELY IMPACT FLEET BUSINESSES.

Emissions from transport have been on the rise since 2021, nearly rising back to pre-pandemic figures, with heavy goods vehicles (HGVs) being the second largest contributors, only behind cars, responsible for 28% of climate emissions from road transport in Europe, while accounting for only 2% of vehicles on the road.

The natural increase in HGV and long-haul fleet deliveries means many companies are starting to look at alternative fuels to reduce the emissions produced. Lise-Lotte believes that Liquefied natural gas (LNG) could be that solution.

Benefits of LNG to fleet owners

LNG is a natural gas that has been reduced to a liquid state through a process of cooling, and is the cleanest burning fossil fuel, producing 40% less carbon dioxide than coal and 30% less than oil. LNG can gradually be replaced by Bio-LNG, which emits 85% less CO₂ than diesel and will be key to minimising emissions from the HGV sector. So, although natural gas is still an abundant resource, LNG enables transport companies to seamlessly transition to an alternative fuel source, which is better for the environment and will enable them to meet global decarbonisation goals.

For the drivers of HGVs, LNG doesn't detract from the driving experience or vehicle performance.

One additional benefit is that LNG engines are 50% quieter than diesel engines, which means greater flexibility with regard to loading times in city centres and a reduction in the costs associated with day deliveries and traffic jams for fleet owners, allowing for late-night deliveries with less disturbance to quieter areas.

Transitioning to LNG can positively impact fleet business in several ways. Firstly, LNG engines often boast a longer lifespan than traditional diesel engines, enhancing the

overall durability of a fleet. There is a growing network of LNG refuelling stations worldwide, the majority of which are currently in Western Europe and Asia.

LNG infrastructure may be embryonic, but it is fast growing. There are around 725 LNG stations on the continent, with the bulk concentrated in Western Europe, and its cost-competitive benefits means it has strong potential for commercial transport.

LNG is especially well-suited for long-distance road freight transport, given the limited availability of alternatives to diesel in this case, especially given its familiar and fast refuelling method, which is very similar to diesel.

With the emergence of reliable and convenient refuelling units, it becomes easier for fuel retailers to implement clean energies with minimal work or additional costs, and this can even be in addition to conventional fuel dispensers at larger service stations, to cover a multitude of drivers.

The future of LNG for fleets

As the EU transitions towards its intermediate target of a 55% reduction of net-emissions by 2030, 'transitional fuels' (like LNG) will likely play a large part in everything from long haul transport to powering our home deliveries.

A transitional fuel, in contrast to conventional fuels such as oil-derived petrol and diesel, are any types of fuels which contribute to FIT reduction targets. The shift towards LNG being incorporated into transport logistics strategies, as a transitional fuel, marks a much wider evolution in the way the transport and shipping industry approaches its fuelling. Although LNG stations require CAPEX investments, which can be relatively high when compared to petrol or diesel, high volumes of LNG can be sold to many trucks, when compared to EV and H₂ infrastructure.

According to the European

Commission, LNG development into a global commodity can improve the security of energy supply in general by boosting the use of natural gas as fuel for transport. LNG provides a long-term solution, as The International Energy Agency predicts there are enough resources to last 230 years, if consumption remains at current levels.

Joost Jansen, Business Development Manager at DFS, suggests that: "With its environmental advantages, cost-effectiveness, and positive business impacts, (Bio)LNG is on the way to becoming one of the most in-demand fuels globally for heavy-duty transport, alongside hydrogen.

"It can contribute to future energy security measures and facilitate the worldwide transition to decarbonise major carbon-emitting economies. We're witnessing the evolution of the consumer experience in fuelling and convenience retail."

Often referred to as a "bridge" fuel within energy transition efforts, LNG represents an alternative with lower carbon emissions when compared to other fossil-fuel resources, such as coal and oil. As a result, the global demand for LNG continues to grow, but it is not without its own complex challenges when considered as a fuel for HGV fleets. There are questions around the size of CO₂ reduction benefit when compared with diesel, total emission implications and the infrastructure needed for viability across all geographic areas.

What are your thoughts on the use of transitional fuels for HGV reduction and the role LNG may play in that? margaret@fueloilnews.co.uk

The essential work of fuelling the harvest

RIX HAS LONG BEEN COMMITTED TO SUPPLYING AGRICULTURAL FUELS, WITH DEPOTS ACROSS ENGLAND AND SCOTLAND THAT ARE CLOSELY CONNECTED TO LOCAL FARMS. THE DISTRIBUTOR'S FUEL SUPPLY BEGAN IN 1927, AND A DEEP KNOWLEDGE OF THE SECTOR ENSURES THAT RIX UNDERSTAND THE UNPREDICTABLE NEEDS OF THE AGRICULTURAL COMMUNITY.

A RELIABLE SERVICE FROM RIX ENSURES FARMERS CAN FOCUS ON WHAT THEY DO BEST, WITHOUT THE FEAR OF AN EMPTY FUEL TANK AND, FOLLOWING THE USE OF A STUNNING HARVEST IMAGE ON LAST MONTH'S FON COVER, WE SHARE HERE FURTHER EXAMPLES OF THIS VITAL ASPECT OF FUEL DISTRIBUTION.



If you have images from any aspect of the vital work of the fuel distribution industry that you would like to share with us please send them to claudia@fueloilnews.co.uk

Software: latest industry innovations

FOCUSSING IN ON DEVELOPMENTS IN SOFTWARE FOR THE LIQUID FUEL DISTRIBUTION SECTOR, WE CAUGHT UP WITH **GRAEME LEA**, MANAGING DIRECTOR OF CDS COMPUTER DESIGNS LTD (CDS) WHICH IS THE COMPANY BEHIND CODAS, A FULLY INTEGRATED END TO END ERP SOFTWARE FOR OIL AND LPG DISTRIBUTORS.

CDS is a long-standing business within the sector and, back in January 2023, celebrated the 50th anniversary of the company's beginnings. The CODAS software has continually developed throughout this time.

CODAS is a suite of computer software designed to meet the full range of specialist requirements for oil and LPG distributors. Covering prospecting, customer and sales activities, fuelcard management, scheduling and routing, purchasing and stock control it also offers a comprehensive financial suite and extensive management reporting capability.

CODAS is fully integrated; data need

only be entered once to be available for all subsequent processing, and financial information can be traced back to source transactions with drill-down facilities and integral analytical tools.

Exciting update

Already extensively used across the liquid fuel distribution community CDS has implemented CODAS in a further 3 fuel distributors this year including 2 of the Top 20 on the UK Mainland and 1 of the Top 5 in Northern Ireland.

With CODAS 7 in development, Graeme explains why CDS is especially excited about

this latest iteration of the popular software: "CDS has a number of new products under development but the one we're especially proud of is CODAS 7.

"Showing our commitment to the fuels distribution industry for the long term, and building on our existing, market leading software, CODAS 6, we are making the next generation a web-based version, which we can confidently say is a game changer for the industry.

"With customer service excellence as a core principle, we are developing CODAS 7 alongside our userbase, making use of their

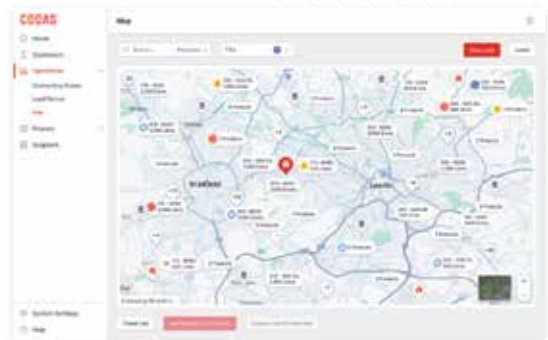


CODAS shifts your foot from the brake to the accelerator

That's why 14 of the UK's top 20 liquid fuel distributors choose CODAS to boost efficiency, profitability, and customer service, accelerating their business performance.

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We continuously improve and innovate to ensure CODAS leads the way, driving your business forward today and into the future.



Are you ready to join us?

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valuable industry experience. Already garnering positive comments from this working group as much more accessible, intuitive and easier to use, we are delighted to say that all of our existing customers are set to receive the upgrade to CODAS 7 at no additional charge.

“The new version is already proving itself in the field at our beta sites, and we will be shipping the production version of the first completed areas of CODAS 7 beginning in Spring 2025.”

Further development

In addition to the launch of CODAS 7, CDS is set to introduce another new product, CODAS eCom, in autumn 2024.

This innovative platform will significantly enhance CODAS clients’ e-commerce capabilities, enabling them to seamlessly interact with their customers and prospects online. CODAS eCom integrates directly into clients’ existing websites, offering features such as instant quotations, order placement,

and account management, all within a familiar interface. Another key highlight is complete integration with the back-office CODAS system, meaning quotes, orders and payments are immediately available for action in the core platform.

We look forward to hearing more as these upgrades and products are released and will continue to keep you updated with any exciting functionality that is in the pipeline!



Improved efficiency and enhanced customer experience

TouchStar Technologies has been supplying logistics optimisation solutions for the oil and gas sector for almost four decades. TouchStar’s specialist ATEX approved mobile computers are designed, manufactured and serviced in its Manchester office and the application software which runs on the in-cab devices is also created and supported in house by TouchStar’s experienced software developers.

The solutions incorporate both standard and bespoke software and a range of integrated peripherals such as scanners, printers and credit card readers.

Fuelstar application software was developed in conjunction with some of the fuel industry giants, and facilitates a live connection between drivers, transport staff, accounts teams and customers. Sharing live data regarding vehicle position, on-board stock, delivery volumes and pricing, Fuelstar enables both better operational decision-making and a reduction in administration.

Partnering with the ATEX-approved TS3300 in-cab mobile computer to improve efficiency in the transportation of bulk goods

Fuelstar includes back-office job scheduling and management software. The TS3300 functions as an in-cab hub, consolidating a multitude of data feeds – including tachograph, flow metre, valve control, telematics systems and printer – into one driver-friendly system which feeds information back to the back-office.

Geo fencing: increasing efficiency and enhancing customer experience

In a recent bulletin, Touchstar highlighted the geo fencing capability of its Fuelstar system, describing it as ‘a transformational feature’ of the software.

Included as standard with the technology developer’s popular Fuelstar system, we dug a little deeper to find out how it can both improve efficiency and enhance the customer experience leading to much greater customer satisfaction.

A tool that can help to improve the delivery process, geofencing uses GPS technology to set virtual boundaries and enable systems to react to vehicles as they enter or leave the defined area.

Tracking the transition in and out of an area enables businesses to have a transparent view of drivers and deliveries enabling functionality that delivers an optimal customer experience.

With the flexibility to be configured to exact requirements, Fuelstar essentially enables a virtual boundary to be set up around a known delivery point. Once the truck breaks into that boundary for its next scheduled delivery, an SMS can be sent automatically to your customer, giving notification that their delivery is on its way.

This also allows the customer to be prepared for the arrival of the tracked vehicle which also improves efficiency for the driver, potentially reducing the time from arrival to commencing the pump-off.

Overall, geo fencing is a facility that optimises workflow and ensures an enhanced delivery experience for the customer and can also help to reduce the time that drivers need to complete their deliveries, saving your business time and potentially increasing the number of deliveries that can be completed in a day.

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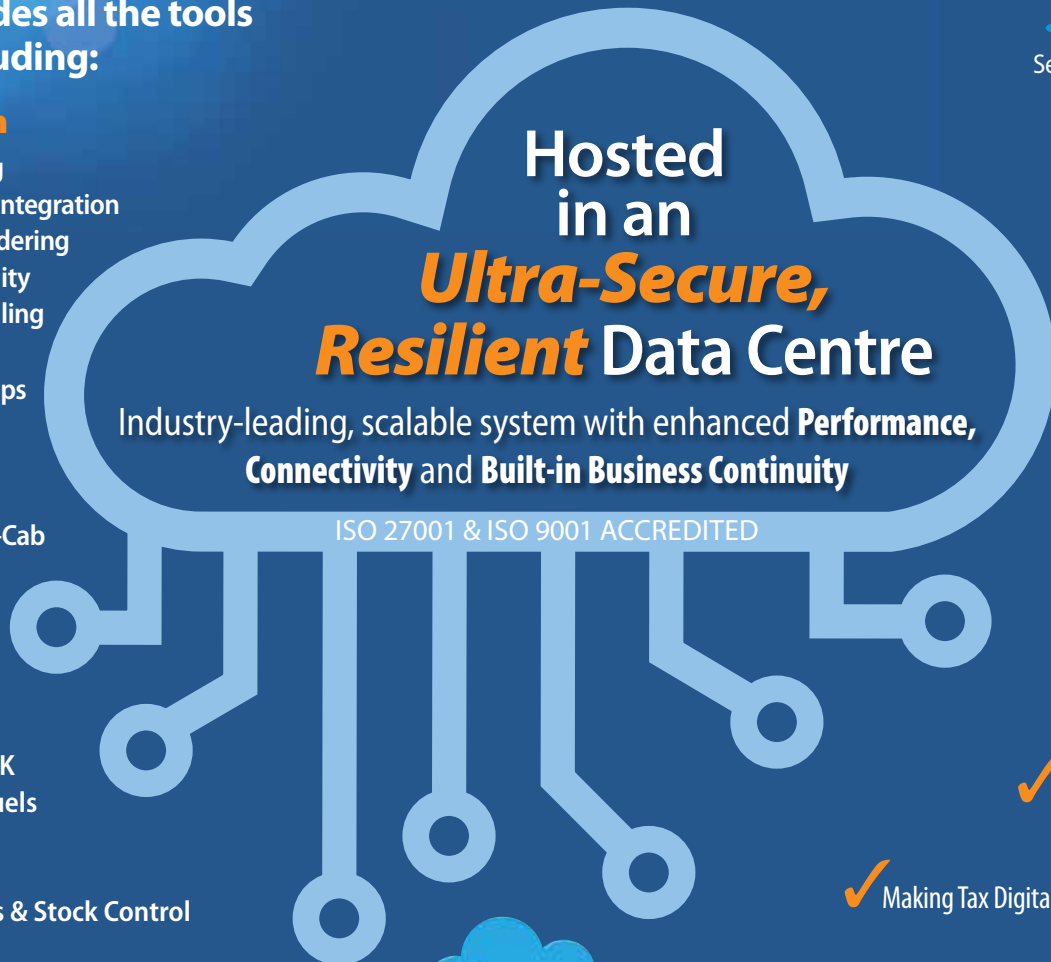
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Credit/Debit Card Facility
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RDCO/ROM1
Repeat Orders & Top Ups
Lubricants and Warehouse Stock
Integrated Financials
Optional Routing & In-Cab Computers

Fuel Card Management

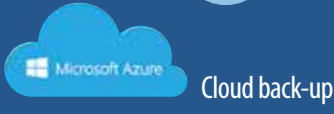
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PORTLAND MARKET REPORT



WHY A LACK OF BOTH INFRASTRUCTURE AND GREEN PRODUCTION LEAVES HYDROGEN-FUELLED VEHICLES A 'GREY' AREA.

10 years ago this month, Toyota launched their first mass-produced hydrogen car at the Los Angeles Auto Show. The Toyota Mirai was powered by a hydrogen fuel cell stack that generated electricity to drive an electric motor. Producing around 180 brake horsepower and with a range of 400 miles, the new vehicle was understandably the talk of the show, and Toyota were quietly confident that their new vehicle represented the future for sustainable mobility. Yet 10 years later – whilst still on sale and popular amongst its owners – Toyota has only sold 21,500 Mirais. By comparison, the Japanese automotive giant sells 55,000 of its battery-hybrid electric (Prius) and 1m Corollas (Toyota’s most popular model) each year. The Corolla of course is a bog-standard internal combustion engine automobile.

Evidently then, hydrogen vehicles have not taken off in the way that many predicted back in 2014. This is somewhat of a head-scratcher when you consider that the science behind hydrogen power has long been understood, and the funding for this particular technology more than plentiful. However, science and money have not solved the first problem associated with hydrogen and that is that the only way to currently produce it at scale is via crude oil refining and / or the steam reformation of natural gas. Both processes produce what is called “Grey Hydrogen”, which, of course, cannot be classified as an environmentally friendly energy source, irrespective of its end-use.

“Green Hydrogen” on the other hand relies on the electrolysis of water (i.e., splitting the H₂ from the O) but producing this at scale is also problematic. The obvious requirement of electrolysis is electricity and, to make the hydrogen green, that electricity must come from eco-friendly generation (e.g., wind or solar). Furthermore, the separation of hydrogen from water requires huge amounts of said electricity, which makes green hydrogen expensive (\$250 - \$300 per barrel of oil equivalent) and, thus, commercially unviable in the current energy market. Additionally, there is a more abstract problem with green hydrogen which is the result of today’s virtually endless demand for renewable electricity. If

you are a wind or solar generator, you can sell your electricity easily and directly into the grid, creating revenue, reducing carbon and (because of that) almost certainly benefitting from environmental subsidy. Why then add an extra leg in the chain for industrial scale electrolysis, to effectively achieve the same outcome...?

The next thorny issue concerning hydrogen concerns distribution. Broadly speaking, green electricity can be plugged straight into the grid, whereas getting hydrogen to the consumer requires complex and far-reaching infrastructure. In the UK, our annual road fuel consumption of 50bn litres per annum is distributed via 6 refineries, 8 import terminals, 4 rail-loading facilities, 6,350 miles of pipelines, 30,000 petrol tankers, 8,500 forecourts and

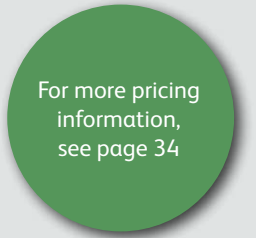
“WHY ADD AN EXTRA LEG, TO EFFECTIVELY ACHIEVE THE SAME OUTCOME?”

140,000 dispensing nozzles. To construct a conventional petrol station costs around £2m, whereas a road-side hydrogen site comes it at more like £10m (a fully electric site is circa £5m). For these reasons it is hardly surprising that there are only 7 hydrogen filling facilities in the UK, 100 in Germany (which is more than all EU countries combined) and 250 in China. When you compare these figures to the number of bog-standard petrol stations (UK = 8,500, Germany = 14,500, China = 110,000) it begins to look naïve to think that the world will be capable of ramping up electricity networks for the mass electrification of vehicles, whilst at the same time doing the exact same thing for a universal hydrogen fuelling system.

None of this means we can or should write-off hydrogen in its entirety. After all, there are over a 1,000 major hydrogen projects currently “in-play” around the world and some of these will come good and allow hydrogen to play a role in the decarbonisation process. Heavy (i.e., energy intensive) plant and equipment,

such as diggers and earth movers, lend themselves to direct hydrogen combustion (rather than hydrogen fuel cells), which is why JCB is investing heavily in this technology. Other “closed fuelling networks” (i.e., where fuelling takes place on one site or in a limited geography) might benefit from the longer range, reduced weight and quicker refuelling times offered by hydrogen when compared to battery electric. More broadly, and with incentivisation, it is easy to see clean (green) hydrogen displacing dirty (grey) hydrogen currently in use for the likes of fertiliser manufacture, methanol for chemicals and steel making. More tantalising still could be the use of green hydrogen from electrolysis for long-term energy storage, because whereas batteries lose charge over time, liquid hydrogen retains its energy indefinitely. And finally, maybe we will even see the return of “Town Gas” – last used in the 1960’s – where hydrogen is blended with natural gas for home heating. This is not quite as outlandish as it sounds, for it is estimated that up to 10% of hydrogen can be “cut” into natural gas networks without any infrastructure modifications.

When it comes to automotive mobility however, there can be no conclusion other than that hydrogen has lost out heavily to battery electric technology. Of the 300m cars in the USA today, 2.53m of them are full or hybrid electric, but only 70,000 are hydrogen powered. And at the same time that Chinese cities add 1,000 electric buses every month to their networks, the total number of hydrogen buses in the whole of Europe sits at 300. Ultimately, a lack of availability of truly green hydrogen, coupled with the innate infrastructure advantages enjoyed by green electricity from day 1 (the existence of sub-stations, transmission lines and existing connectivity into homes and businesses) probably means that this was always the inevitable outcome.



Portland
www.stabilityfromvolatility.co.uk

Fleetmaxx Solutions: prioritising mental health in the workplace

FOUNDED IN JUNE 2019, FLEETMAXX IS A LEADING FLEET AND FUEL SERVICES COMPANY DEDICATED TO PROVIDING INNOVATIVE SOLUTIONS AND EXCEPTIONAL SERVICE. WITH A STRONG COMMITMENT TO GROWTH AND DEVELOPMENT, FLEETMAXX SOLUTIONS CONTINUES TO EXPAND ITS REACH AND IMPACT IN THE INDUSTRY. IN THIS CONTINUATION OF OUR SERIES ON THE IMPORTANT TOPIC OF MENTAL WELL-BEING, **STEVE CLARKE**, MARKETING MANAGER, SHARES MORE ABOUT THE IMPORTANCE THE COMPANY PLACES ON THIS ASPECT OF THE WORKPLACE, AND THE STEPS IT HAS TAKEN TO ADDRESS IT.

Fleetmaxx Solutions is part of the Oilfast family, with the company's head office sharing the same location in Motherwell, together serving a diverse customer base of over 50,000 clients. Customers range from HGV operators and hauliers to couriers, delivery drivers, plumbers builders, farmers, electricians, taxi chauffeurs and private hire services and include large organisations, fleet managers, transport managers, sole traders, owner-drivers, and even start-up companies.

Both Oilfast and Fleetmaxx Solutions remain true to their roots as family-owned businesses, holding a deep respect for customers and staff. This foundation guides the business approach with a strong focus on delivering exceptional customer services with a competitive and transparent approach.

The commitment to excellence extends beyond providing quality fleet products and unparalleled customer service.

Dedicated to the well-being of team members, Fleetmaxx believes a healthy workplace to be the foundation of a successful business. To reinforce this, Sue Florence (Director), Mark Checksfield (Operations Manager), and Adam Winchcombe (Sales Manager) attended a two-day Mental Health First Aid course delivered by St John Ambulance. The company shares more about it here.

Mental health first aid: a crucial investment for Fleetmaxx

The management team at Fleetmaxx Solutions believes that mental health is a critical aspect of the overall well-being of our teams, and addressing it in the workplace is essential.

That is why we selected the Mental Health First Aid course provided by St John Ambulance, which equips participants with the skills and knowledge needed to support colleagues facing mental health challenges. Upon completion, our team members received



the FutureQuals Level 3 Award in Mental Health: Workplace First Aider qualification. This certification empowers the Fleetmaxx team to identify and assist those in need of mental health support within our organisation.

Key takeaways from the course

The two-day intensive course covered several vital areas:

Understanding mental health:

Participants gained a comprehensive understanding of mental health and the various factors that can affect well-being.

Recognising signs and triggers: The course provided practical skills to identify the signs and triggers of mental illness, enabling timely and effective intervention.

Physical first aid knowledge: In addition to mental health support, Sue, Mark and Adam learned how to perform some physical first aid as part of their response to mental health crises.

Building confidence: Our team members now have the confidence to step in, reassure, and support a person in distress, fostering a supportive work environment.

Implementing adjustments: The training covered how to implement reasonable mental health adjustments when an individual returns to work, ensuring a smooth transition.

Promoting a positive culture: Finally, the course emphasised creating a positive mental health culture in the workplace, which is crucial for long-term well-being and productivity for Fleetmaxx staff.

The impact on Fleetmaxx Solutions

By investing in mental health first aid training, Fleetmaxx Solutions demonstrates its commitment to the well-being of its employees. Sue Florence, Mark Checksfield, and Adam Winchcombe are now equipped to serve as Mental Health First Aiders, ready to support their colleagues and foster a healthier workplace environment.

This initiative is a testament to our belief that a supportive and understanding workplace leads to happier, more productive employees.

Our commitment to customers

At Fleetmaxx Solutions, we understand that the success of our business relies on the well-being of our team. By prioritising mental health and providing our leaders with the necessary tools and training, we ensure that our employees receive the support they need.

We are proud of our team's dedication to creating a positive work environment and remain committed to promoting mental health awareness and support within our organisation.

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emissions by
up to 90%



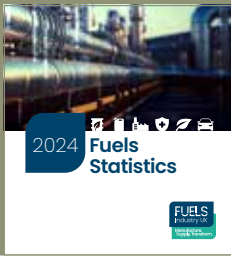
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INDUSTRY INSIGHT

The UK fuel industry: latest statistical analysis

AS FUELS INDUSTRY UK PUBLISHES ITS 2024 FUELS STATISTICS REPORT, WE CONSIDER THE FUELS SECTOR IN THE LIGHT OF ITS FINDINGS.

The Fuels Statistics report is an annual analysis of the latest data from the fuel supply sector. Building on the association's previous publications, the report provides analysis for those working in the industry, policymakers, and all who wish to gain a quantitative understanding of the UK downstream sector.

A vital reference document, the report contains comprehensive information from trusted sources on all parts of the UK fuels supply chain, from where refineries source their crude oil feedstocks, to how many EV charge points are now in operation at the UK's petrol filling stations.

With the sector evolving, it is no surprise that the report summary suggests that fuels is a sector in which 'little stands still', with fluctuating market dynamics, policy shifts, and evolving consumer behaviour.

Some of the headline findings of this year's report are:

- Fuel prices remaining well above 10 year averages despite year on year drops of 10% and 11% for petrol and diesel respectively.
- Increased supply of lower carbon fuels for transport (over 2800 million litres), now also being used for aviation as well as road fuels (95 million litres).
- Evidence that the COVID-19 pandemic has permanently altered mobility patterns, with overall fuel consumption remaining down around 10% (since before 2020).

A fluctuating market

Flagging volatility as one of the perennial themes of the UK fuel sector, the report finds that this year has been no exception, noting that: "Fuel prices remain high against the 10 year average, long term effects of COVID remain – with demand still below pre-pandemic levels – and sources of imported fuels and locations of exports are still changing markedly year on year, even though sanctions on Russia came into force in 2022."

The report indicates reduced throughput and utilisation of UK refineries in 2023 with output below demand, and the continuation of a long term misalignment between product demand and supply (too little diesel and jet

fuel, too much petrol). Following a huge jump in average refining margins in 2022 due to the Russian-Ukraine conflict, a 22% decrease, from 20.00\$/barrel in 2022 to 15.51\$/barrel in 2023, still leaves margins significantly above that of 2021, of around 6\$/barrel.

The energy transition

The report highlights "a concerted push towards alternative fuels as well as hybrid and electric vehicles with both continuing to grow year on year".

However, despite a record year for EV registrations, data from the Department for Transport indicates that the rate of uptake is slowing, and petrol vehicles still hold the largest share of all new vehicles sold.

Policy and regulatory changes

The FIUK report also notes the "significant policy and regulatory changes aimed at accelerating the UK's energy transition and ensuring energy security" introduced during the year.

Zero Emission Vehicles Mandate

One of the significant changes was the enshrinement in law of the pathway for zero emissions vehicles transition by 2035. The introduction of the Zero Emissions Vehicles Mandate, in January of this year, will see manufacturers obligated to sell an increasing number of zero tailpipe emissions car and vans.

The mandate sets out the percentage of new zero emission cars and vans manufacturers will be required to produce each year up to 2030. With a starting rate of 22% in 2024, the mandate increases the percentage each year, reaching 80% of new cars and 70% of new vans sold in Great Britain by 2030, and 100% by 2035.

Sustainable Aviation Fuels Mandate

The UK Government also announced the introduction of the Sustainable Aviation Fuels (SAF) Mandate, a policy that requires a certain percentage of jet fuel used in the UK to be SAF.

The mandate will encourage the innovation of advanced fuels that can generate greater emission reductions and the diversification of feedstocks to reduce dependencies on scarce resources, by including in the mandate:

- A cap on the feedstocks used in the hydroprocessed esters and fatty acids (HEFA) process, but not until other types of SAF are also commercially viable to recognise the important part that HEFA SAF will play in the 2020s. HEFA supply will not be limited under the mandate for the first 2 years, fall to 71% in 2030 and still contribute 35% in 2040.
- A separate obligation on power to liquid fuels from 2028 that reaches 3.5% of total jet fuel demand in 2040.

The mandate will include a buy-out mechanism for both the main and power to liquid obligations, set at £4.70 and £5.00 per litre of fuel, respectively, to incentivise supply while protecting consumers where suppliers are unable to secure a supply of SAF.

These provide a significant incentive for fuel suppliers to supply SAF into the market rather than pay the buy-out. They also set a maximum price for the scheme, and therefore deliver emission reductions at an acceptable cost. The plan includes a review mechanism to help minimise the impact on ticket fares for passengers.

The mandate will begin in 2025 with the percentage of SAF increasing gradually from 2% in 2025 to 10% in 2030, and then to 22% in 2040. The mandate is part of the government's "jet-zero" strategy to decarbonise air travel, but there are fears that emissions reduction achieved through the mandate will be largely offset by rising demand for air travel.

SAF revenue certainty mechanism

The bill outlining the SAF mandate, announced on 17 July this year, will also introduce a Revenue Certainty Mechanism (RCM) for SAF producers who are looking to invest in new plants in the UK.

This builds on the SAF mandate, which will create demand for SAF by setting targets on fuel suppliers to use a proportion of SAF.

There are a number of SAF projects being developed across the UK. Bringing in a Revenue Certainty Mechanism will help to reduce risk, giving investors the confidence they need to invest in UK SAF plants. It will increase the likelihood SAF plants will be built in the UK, thereby securing a supply of SAF for the UK aviation sector and supporting the delivery of the SAF mandate.

This year's Fuels Statistics report includes

new information on SAF demand and production as well as the Mandate trajectory to help track this emerging market segment.

Renewable fuels

The volume of renewable fuel deliveries has continued to grow in line with the growing RTFO, although the UK did not meet its RTFO target, resulting in the payment of a small buy-out. There are also growing deliveries of SAF in advance of the planned mandates from 2025.

Deliveries of renewable fuel have increased by 2.6% in 2023 from 2764.5 to 2871.1 million litres, with a decrease of 3% in biodiesel and an increase of 12% in bioethanol. The UK imports most of its renewable fuels, with many coming from Asia.

In terms of feedstocks, RTFO double counting and the specification limit of 7% FAME in forecourt diesel means waste-derived sources are better placed to meet obligations and they make up 66% of total feedstocks in 2022 – an increase of 12% on the previous year due to the impact of the crop cap and RTFO limit increases.

UK renewable fuel feedstocks were mostly

from used cooking oil, with China the top import location.

In 2023, 95.88 million litres of SAF feedstock was used in the UK. The UK provided 7.68 million litres (8%), which means the UK is reliant on imports to meet demands. Without changes to SAF feedstock availability, the UK will have to import the majority of its feedstocks to meet the SAF mandate obligations.

Emissions

Despite increased economic activity in 2023, the UK economy's greenhouse gas (GHG) emissions have remained below pre-pandemic levels, and emissions of both greenhouse gases and air pollutants have been falling across the last decade, driven by improvements in technology and regulation.

The sectors with the highest emissions continue to be domestic transport and buildings and products uses, both contributing 31% to the total.

The UK has continued to over perform against its GHG emissions targets set out in Carbon Budget 3 and the total GHG savings of 2022 show the UK is on track to meet or exceed

the new targets set out in Carbon Budget 4 that begins in 2025

Commenting on the picture for the fuel sector, Elizabeth de Jong, Chief Executive Officer at Fuels Industry UK said: "It was a mixed picture within our sector, with refining CO2 emissions growing by 1%, and sulphur dioxide emissions also up (13%), but there were notable reductions in particulate matter (down 17%) and non-methane volatile organic compounds (down 8%), while nitrogen oxide was flat.

"The diverse changes year on year likely reflect changes in operations in response to changes to demand and crude feedstock availability with refiners optimising their set-ups accordingly."

Following the report findings Elizabeth concluded: "As always, little stands still in the fuels sector and this year has been no different.

"The past year has seen fluctuating market dynamics, policy shifts, and evolving consumer behaviour, through which the sector continues to supply the fuels the UK needs."

Fuels Statistics 2024 is available on the Fuels Industry UK website.



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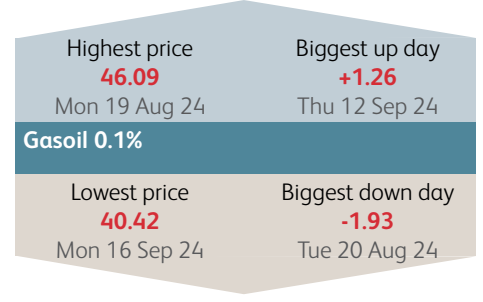
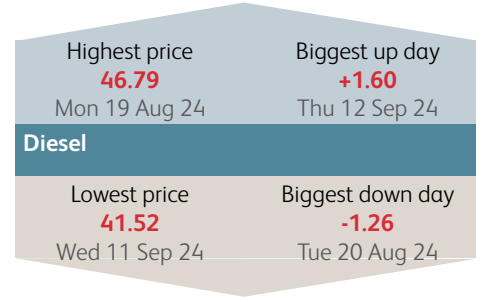
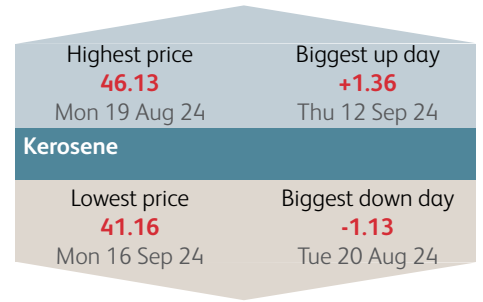
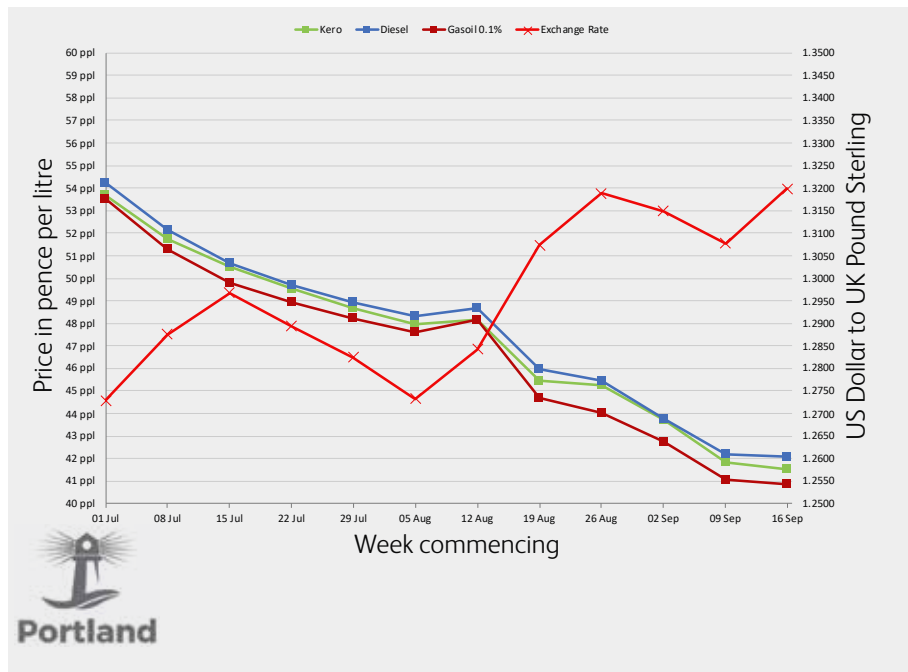
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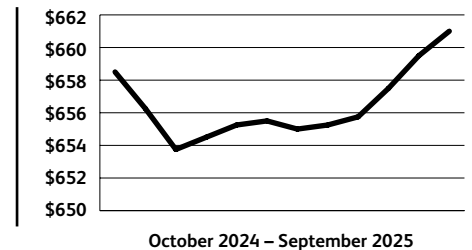
Wholesale Price Movements: 19th August 2024 – 18th September 2024

	Kerosene	Diesel	Gasoil 0.1%
Average price	43.66	44.00	42.80
Average daily change	0.61	0.62	0.67
Current duty	0.00	52.95	10.18
Total	43.66	96.95	52.98

All prices in pence per litre



Gasoil forward price
in US\$ per tonne



The Fuel Oil News Price Totem

	Trade average buying prices			Average selling prices		
	Kerosene	Gasoil	ULSD	Kerosene	Gasoil	ULSD
Scotland	44.98	54.90	99.13	51.28	58.66	103.01
North East	43.93	53.53	98.21	52.66	57.02	101.06
North West	45.50	56.13	100.60	51.56	59.41	103.15
Midlands	44.00	54.06	98.67	49.90	57.50	101.77
South East	44.10	54.02	98.65	56.28	60.02	101.33
South West	44.45	53.86	98.49	52.32	57.29	100.94
N. Ireland	44.56	55.23	n/a	50.37	59.46	n/a
Republic Of Ireland	58.32	60.66	100.07	63.75	64.25	103.24
Portland	42.31	51.58	95.36			

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

Buying prices are ex-rack. Selling prices are for 1000 litres of kero, 2500 litres of gas oil and 5000 litres of ULSD (Derv in ROI). Prices in ROI are in €.

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

For more information and access to prices, visit www.portlandpricing.co.uk

WELCOME TO OCTOBER'S EDITION OF OUR SPECIAL MONTHLY FEATURE WHICH GIVES YOU THE OPPORTUNITY TO 'MEET' AN INDUSTRY FIGURE AND, HOPEFULLY, TO DISCOVER ANOTHER SIDE TO THEM BEYOND THE WELL-KNOWN FACTS. THIS MONTH WE CHAT WITH **EMMA OSBORN-WILKES**, MANAGING DIRECTOR, AT HALSO FUELS UK AND EL-OILS.

"NOBODY IS EVER GOING TO INVITE YOU – YOU HAVE TO DO IT."

EMMA OSBORN-WILKES

Please give your career history in 25 words or fewer.

Worked in a café part time on weekends when I was at school, then started at Halso Fuels as a 'Saturday Girl' filing and answering the phone. I have progressed to Managing Director and I am leading the business into growth.

Describe yourself in 3 words.

Driven, determined and dependable.

What were your childhood / early ambitions?

I always wanted to be involved in business; I even applied to go on The Apprentice. I did get accepted to go on the show but, unfortunately, I couldn't take that much time off work!

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

I am doing my dream job!

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

Dare to be different and never give up!

Share your top tips for business success.

Do your homework and be prepared. Then go after things, get into the meetings, make the contacts you need to because nobody is ever going to invite you. You have to do it! Work hard, be passionate, and listen intently to people whose opinion you value.

What's your most recent business achievement of note?

Rebranding the business – it's been very exciting!

Tell us your greatest fear.

Spiders!

Which is most important – ambition or talent?

Ambition!

What's the best thing about your job?

The people I meet and work with.

Which is the quality that you most admire?

Honesty.

What are you most likely to say?

Late morning, early afternoon! A private joke within work when the customer asks an ETA!

What are you least likely to say?

No.

Describe your perfect day

On a Caribbean beach with a cocktail!



Do you have a favourite sports team?

No, but I do enjoy the F1 motorsports and fast cars.

What's the biggest challenge of our time?

Social media.

Cheese or chocolate?

Both! Just missing wine.

Share your greatest personal achievement.

Leading my family business.

What's your pet hate or biggest irritant?

Liars.

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

Food and drink.

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

Longer sentences and more punishment for paedophiles.

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

She would be very proud of herself.

What is number 1 on your bucket list?

To be recognised as a national leading businesswoman and entrepreneur.

What 3 things would you take to a desert island?

My son, food and drink!

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

I dress up as Barbie in my free time for parties for family or friends.

Who would you most like to ask these questions of?

Karren Brady.



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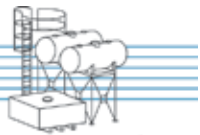


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