



Annual Review 2018



www.tankstorage.org.uk

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Introduction from the President



It gives me great pleasure to welcome you to the TSA Annual Review 2018.

This is the third edition of the review and my first as President, so I would like to start by thanking Andrew Amos for his excellent Presidency of the TSA over the past eighteen months. I am pleased to say that Andrew will remain as Vice-President for a further twelve months to help us continue with our strategic development.

We have seen significant change in the TSA in the past year, with rapid expansion of our Associate Membership, updates to our Articles of Association, and the creation of a board of directors to ensure we continue to deliver our strategic initiatives and grow in a controlled and sustainable manner. We have also recently moved into more spacious offices allowing us to host larger meetings for our members and the many external groups we are engaged with.

BREXIT is still high on our agenda. Whilst recent announcements regarding a transition period have been welcomed, there is a great deal to do in ensuring that our sector is not adversely impacted - and to investigate potential opportunities by simplifying existing processes. We have been working closely with Her Majesty's Revenue and Customs (HMRC) in developing several discussion papers regarding the Customs Union, Customs Warehousing and European Union Acquisitions Taxation and VAT. There is much more dialogue needed, but I am happy to report that we are making positive progress and are committed to working together to identify opportunities for positive change.

You will have also seen recent announcements regarding the Government's strategy to reduce carbon emissions. The route to market for liquid hydrocarbon fuels is large and complex, with TSA members providing an essential part of the logistical supply chain to enable transport, heating and commercial fuels to reach customers. We will be working closely with other trade associations to ensure that industry's voice is heard, and that we have the opportunity to comment on and influence future policy decisions.

Please do take the time to read through this review, and particularly the pages on our work and achievements - I am sure that you will agree that our sphere of influence is large. We are continuing to expand and adapt, forming a strong community of similar businesses which will help us grow further and give us greater opportunity to influence and change what matters to us.

In conclusion, I would like to thank all those within the secretariat and member companies for their continuing support and involvement in the many different committees and forums that are essential to our success.

Paul Denmead

June 2018

About us

The Tank Storage Association (TSA) is an industry based organisation whose member companies are engaged in the storage of bulk liquids and the provision of products and services to the sector. Tank storage provides an essential interface between sea, inland barge, road, rail and pipeline logistics.

Board of Directors



Paul Denmead
Director Terminal
Operations UK
World Fuel Services



Andrew Amos
Non-Executive Director
Business Consultant



Martyn Lyons
Chief Executive
InterTerminals



Peter Davidson
Executive Director
TSA

Members



Our Associate Members play an essential role in Technical, Safety, Health and Environmental matters - sharing and learning operational experience. They work with us on key issues affecting the sector helping us to provide lobbying and advocacy to the UK Government, it's agencies and the European Commission when relevant.

Associate Members





Our Associate Members (Suppliers) make a valued contribution to our Technical, Safety, Health and Environmental work - sharing and learning experience, new products, innovation, services and contributing to the development of new guidance where appropriate.

Associate Members (Supplier)



Our aim is to build a strong community of businesses engaged in the storage of bulk liquids, terminal and port operations and those providing equipment and services to the sector.

We believe that in working together we can provide strong and effective lobbying, advocacy and knowledge exchange - helping us to work more effectively, efficiently and safely.



Contribution to the UK economy



The bulk liquid storage sector in the UK is diverse, providing a critical component in the supply chain for many industries from transport fuels to animal feeds. Our members operate over 295 terminals in the UK and Republic of Ireland, providing 8,285,000 m3 of storage capacity.



£2.8 B

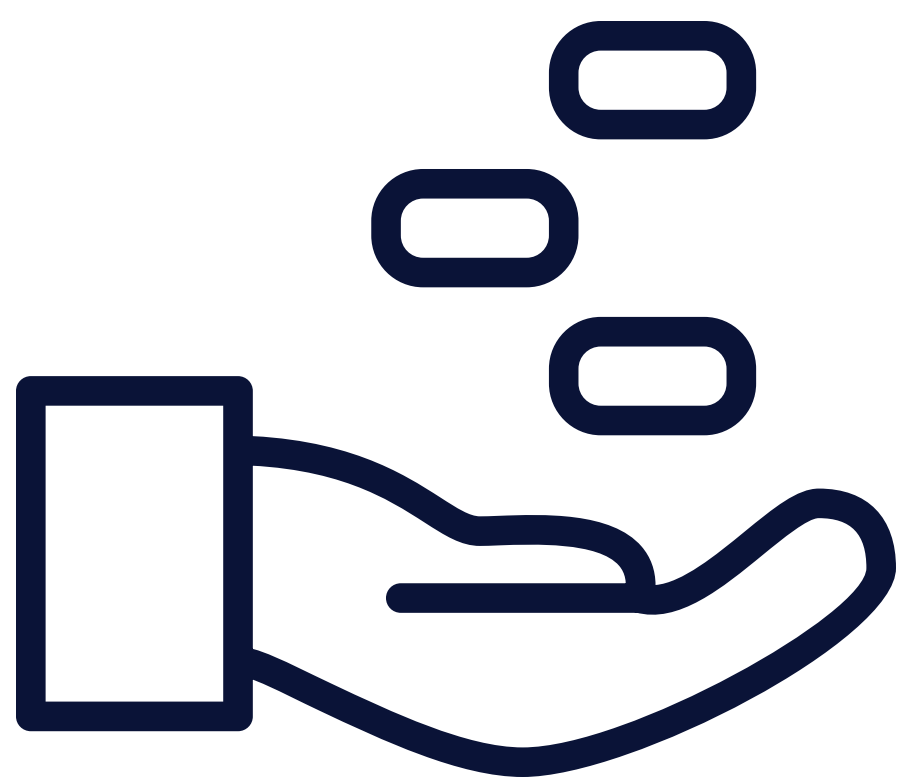
revenue in 2017



3,500

Employees in the UK

In the UK and ROI, Including long term contractors



£555 M

planned investment in the next 5 years

In the UK and ROI

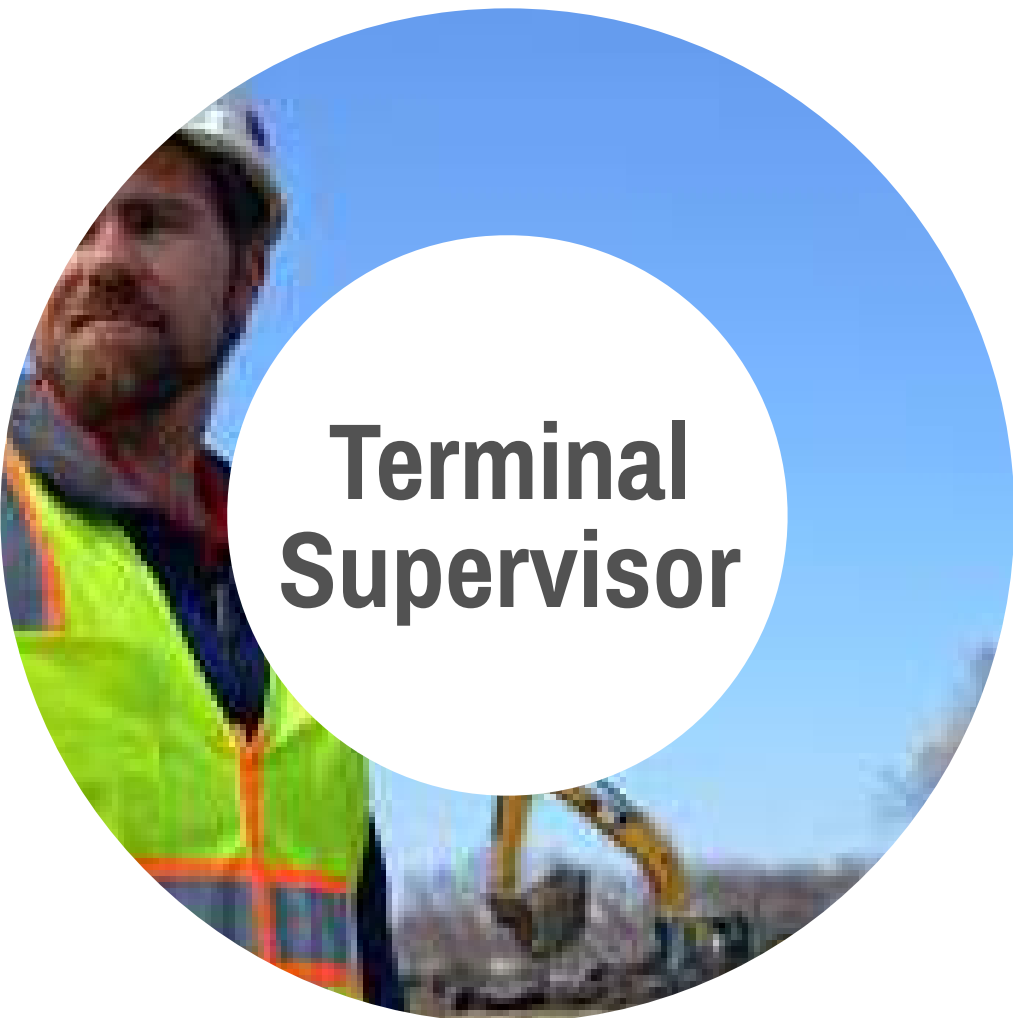
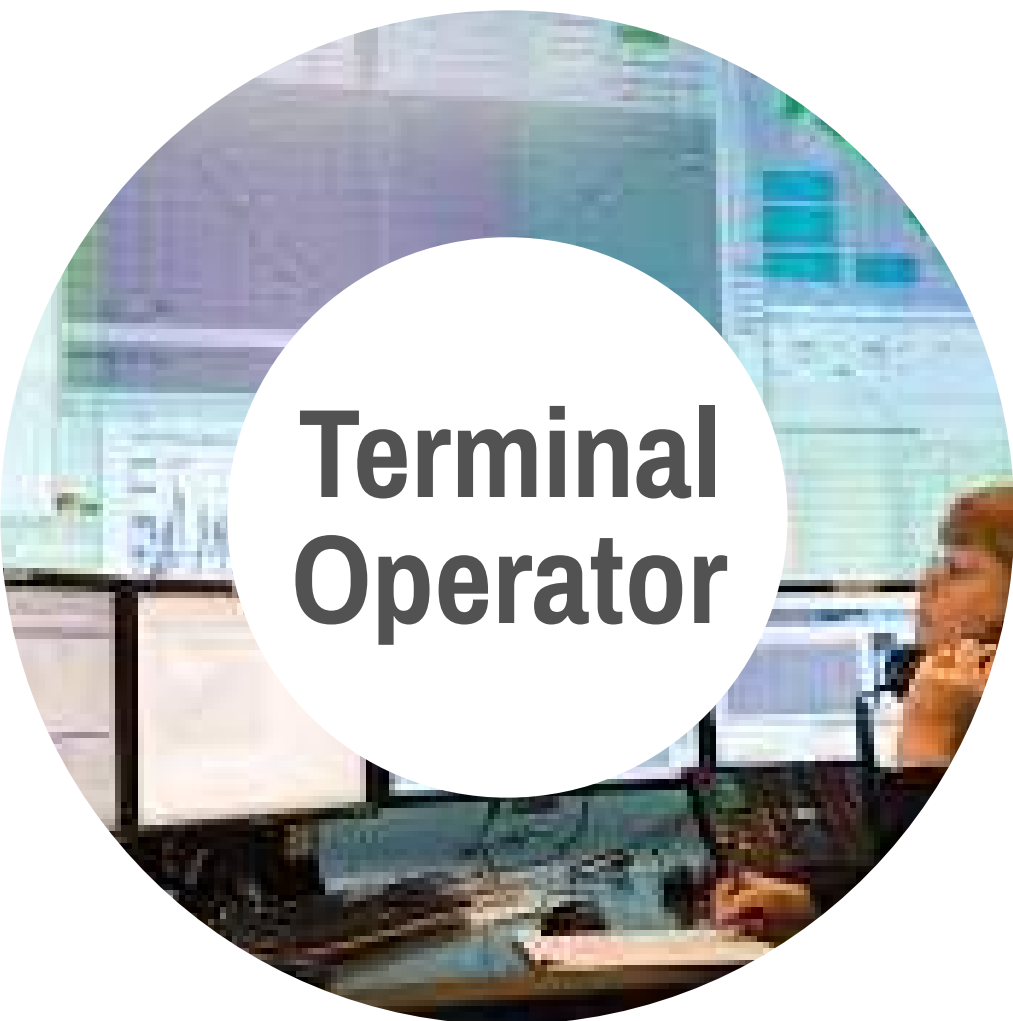
Training and Skills



Bulk liquid storage, terminal operations and related industries provide employment for many thousands of people across the UK.

Since the introduction of the Apprenticeship Levy in 2017, there are numerous opportunities to join this exciting, dynamic and progressive industry.

We have been working with skills bodies, training providers and employers to identify key apprenticeships in our sector.



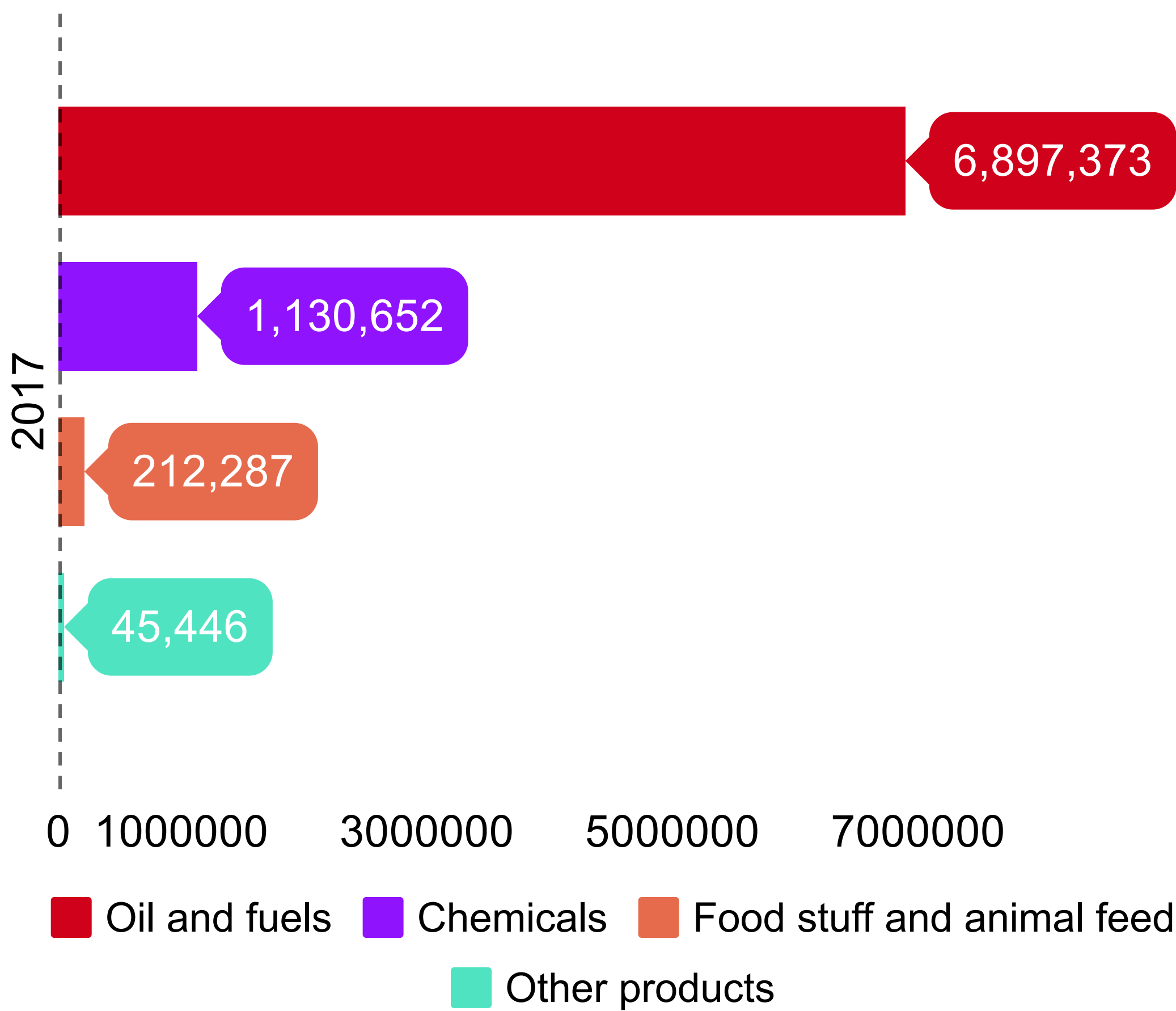
For more information about careers please contact us, or visit our website for current opportunities.

Terminal statistics

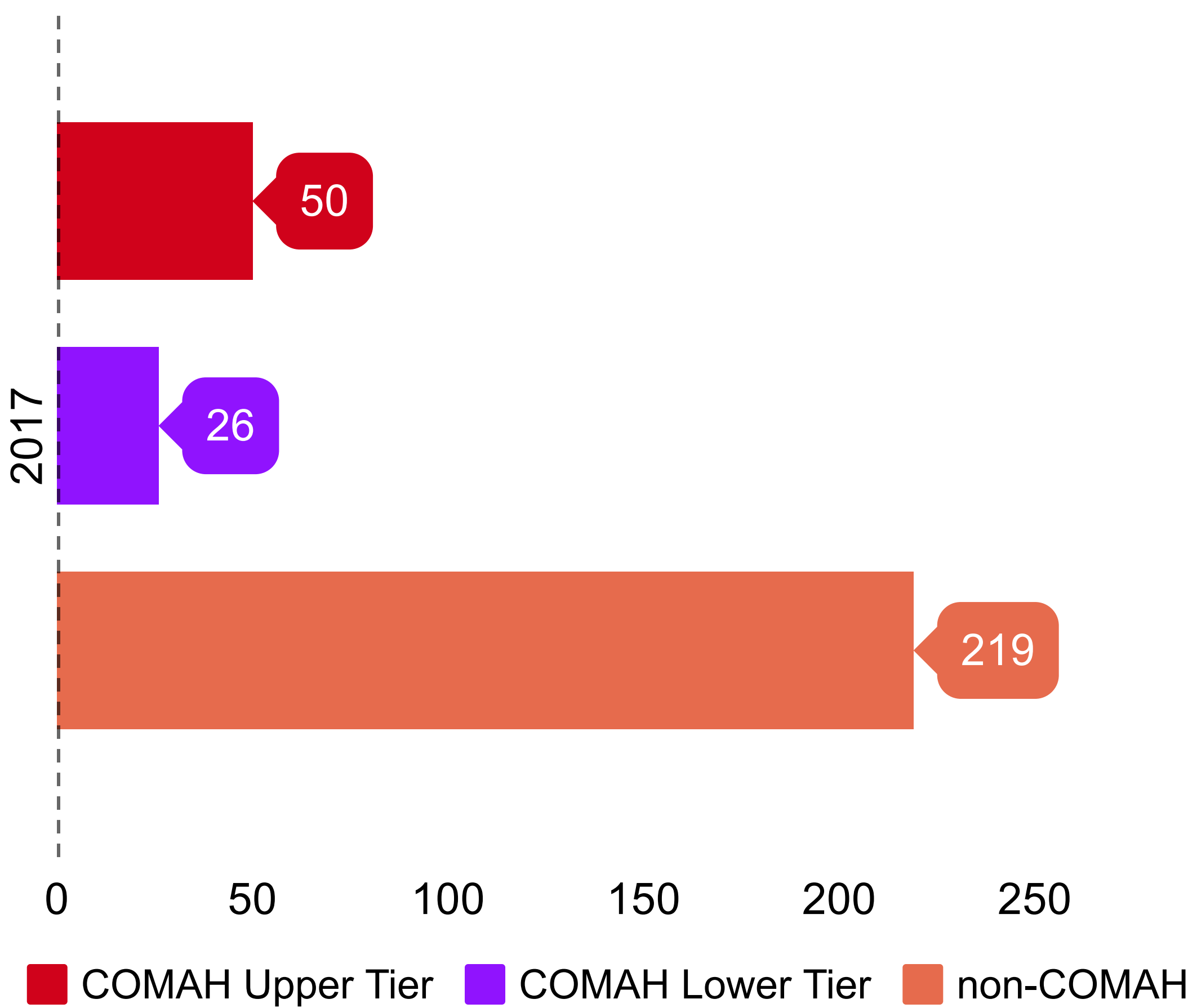


Our members operate a variety of terminals across the UK and Republic of Ireland storing both hazardous and non-hazardous liquids. Depending upon the type and volume of products stored the terminal may be regulated under the Control of Major Accident Hazards (COMAH) regulations, and designated as either upper or lower tier. Equally many of our members are regulated by the environment agencies and hold Environmental Permits.

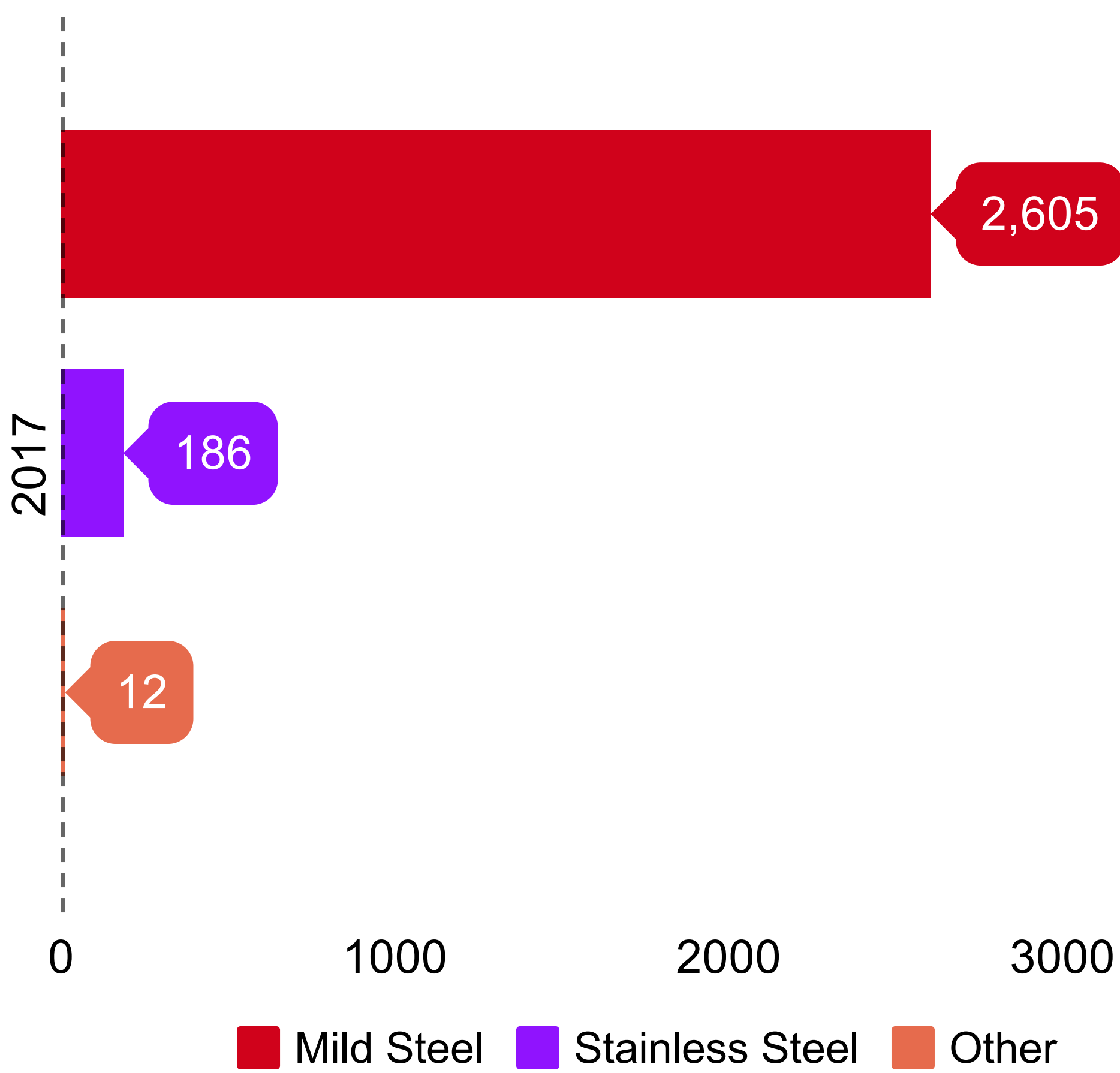
Storage Capacity (m3)



Number of Terminals



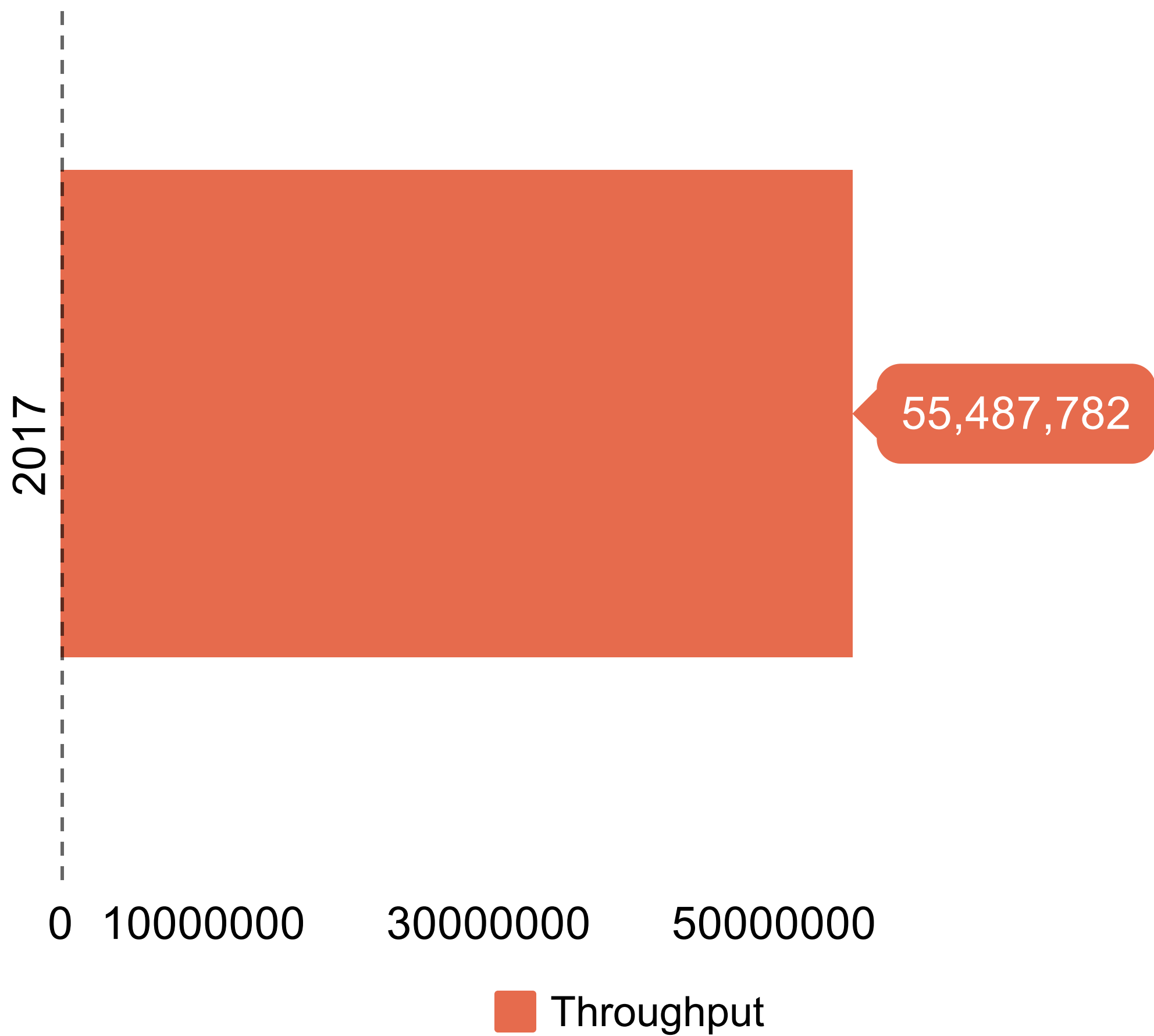
Number of Storage Tanks



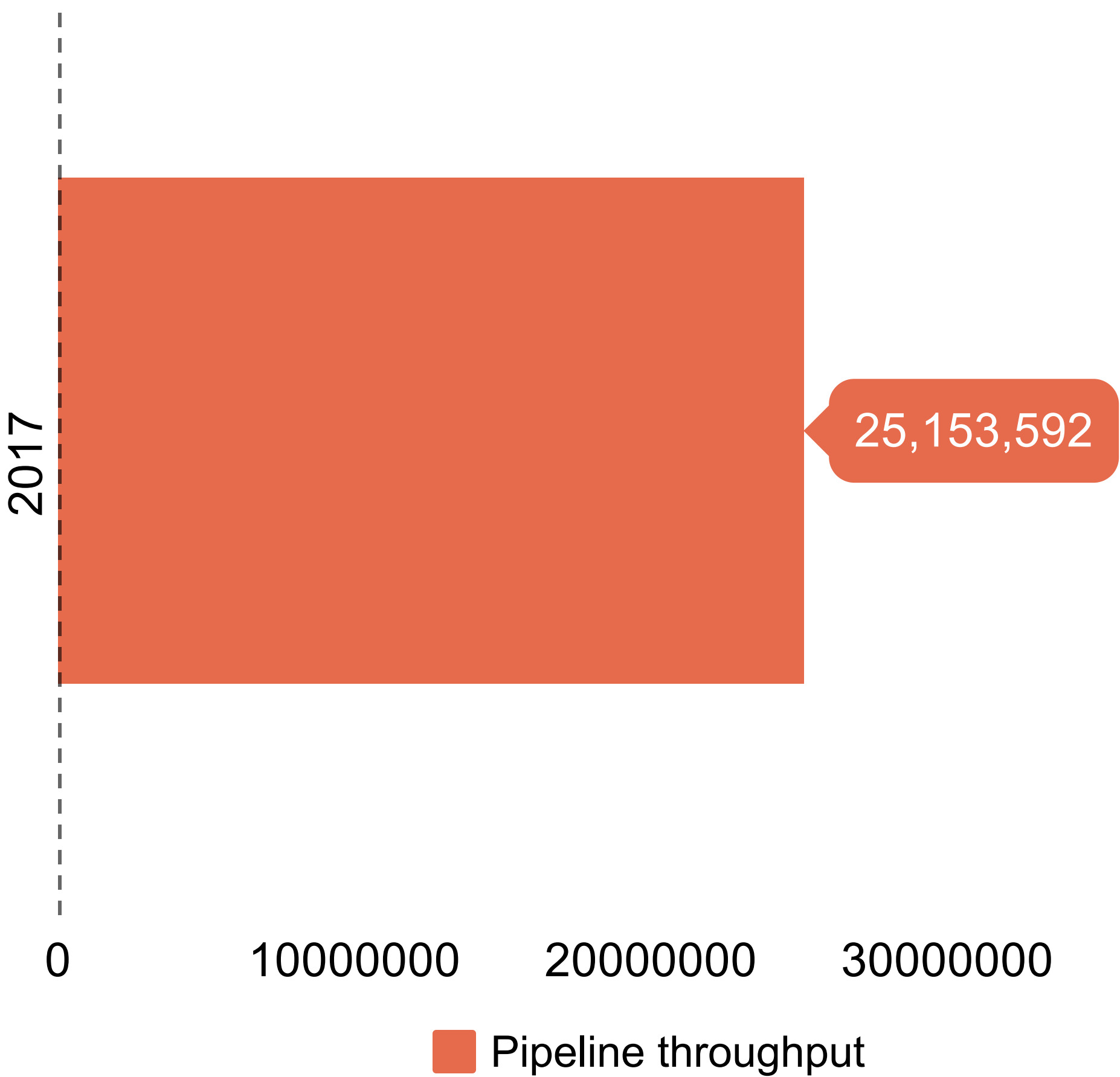


Movement of material into or out of terminals is either by sea-going vessel, inland barge, road tanker, rail tanker or pipeline. Our members safely execute over a million movements each year. By far the greatest number of movements are carried out by road tanker, however this is not representative of the volume of product moved by type - for example, there are far fewer movements by ship than road tanker, but the volume of product moved by ship is much higher.

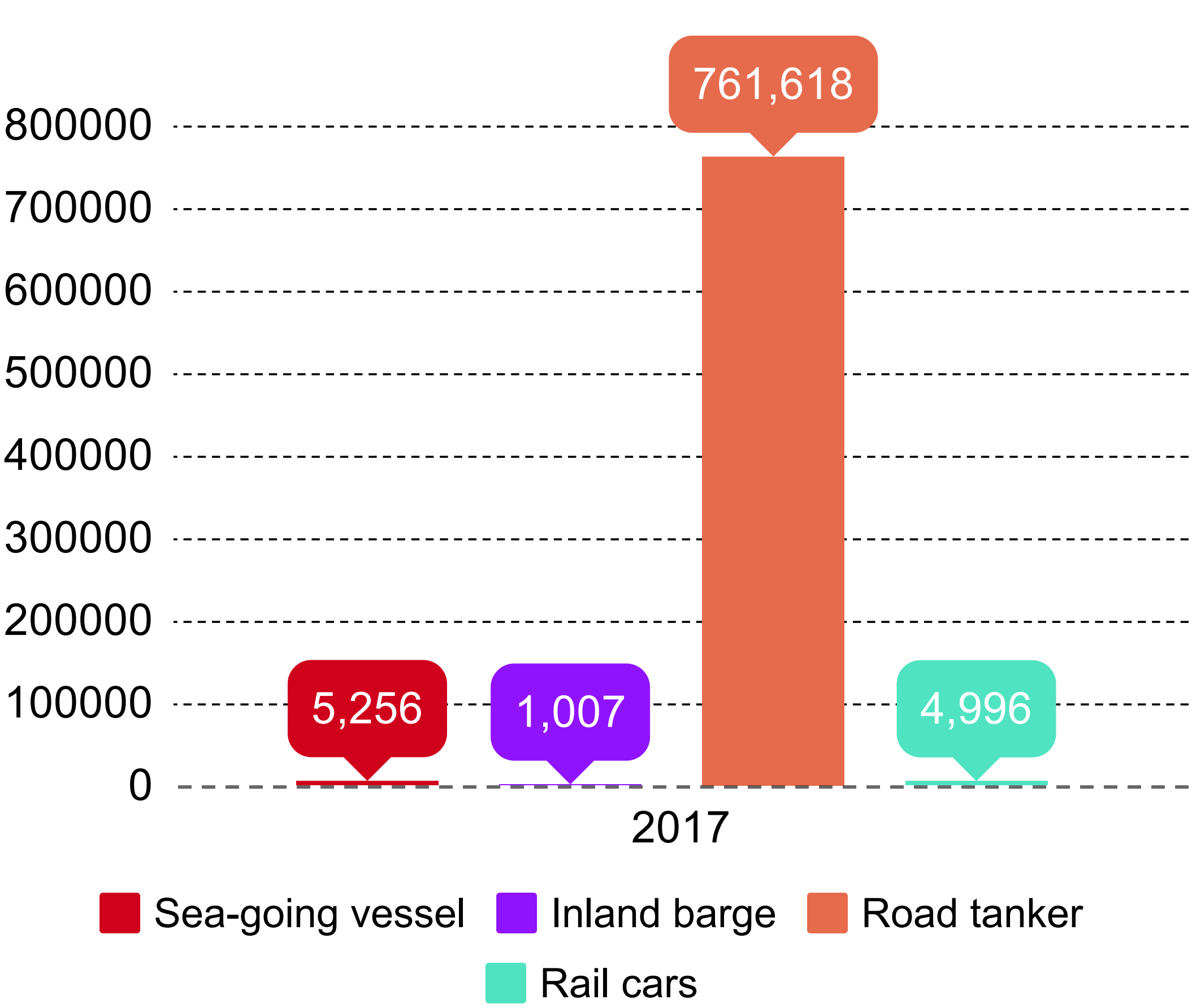
Aggregated Throughput (tonnes)



Pipeline Throughput (m3)



Number of Movements



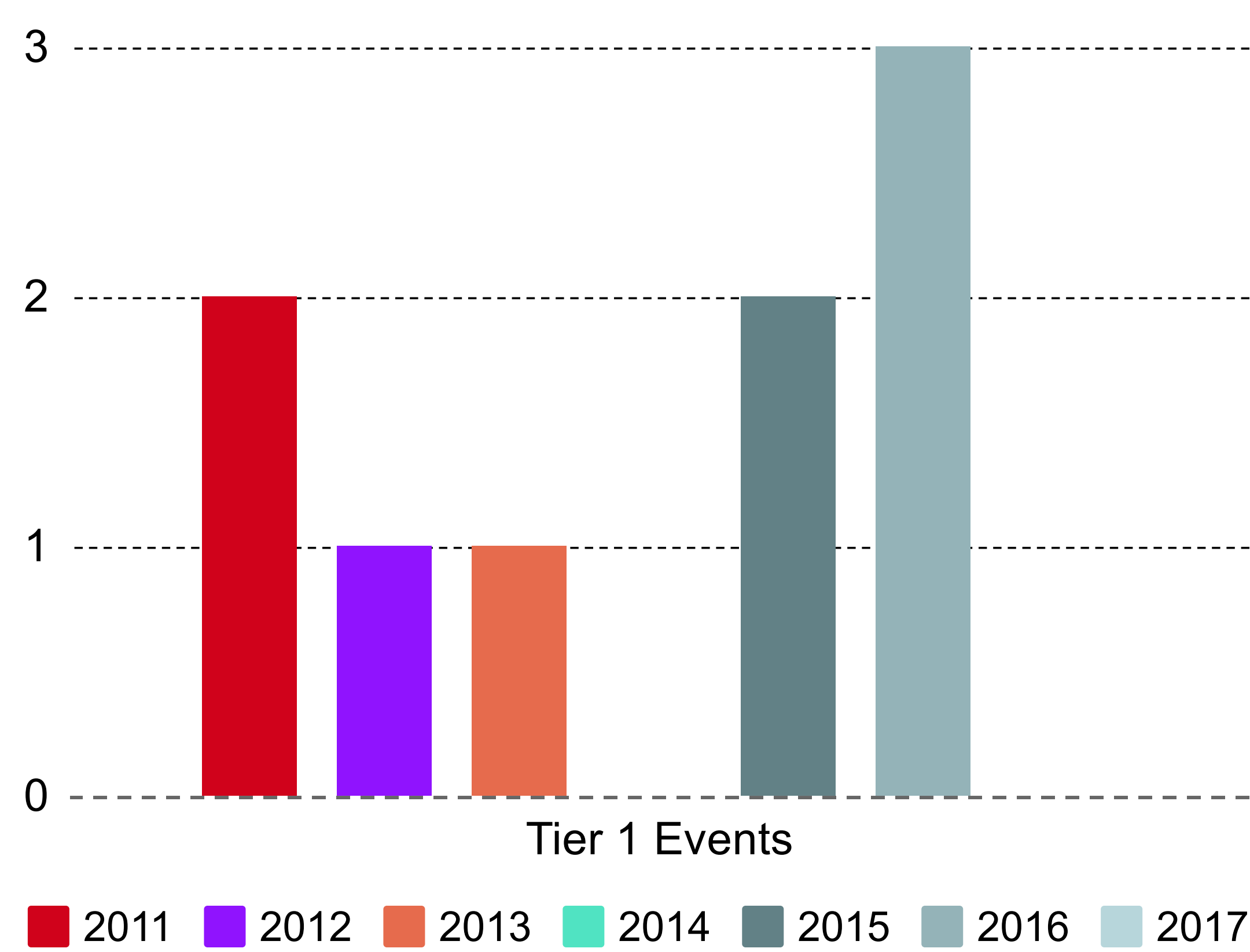
Process safety



Our members are fully committed to the Process Safety Leadership Group Principles of Process Safety established following the Buncefield explosion and fires in 2005. These principles remain valid today. Our dedicated Safety, Health and Environment committee works closely with our peers, other industry sectors and regulators to share knowledge and good practice relevant to safe operations.

To monitor our performance and highlight potential emerging issues, we collate, share and discuss process safety data quarterly with our members. We use the API RP 754 standard for our process safety performance indicators.

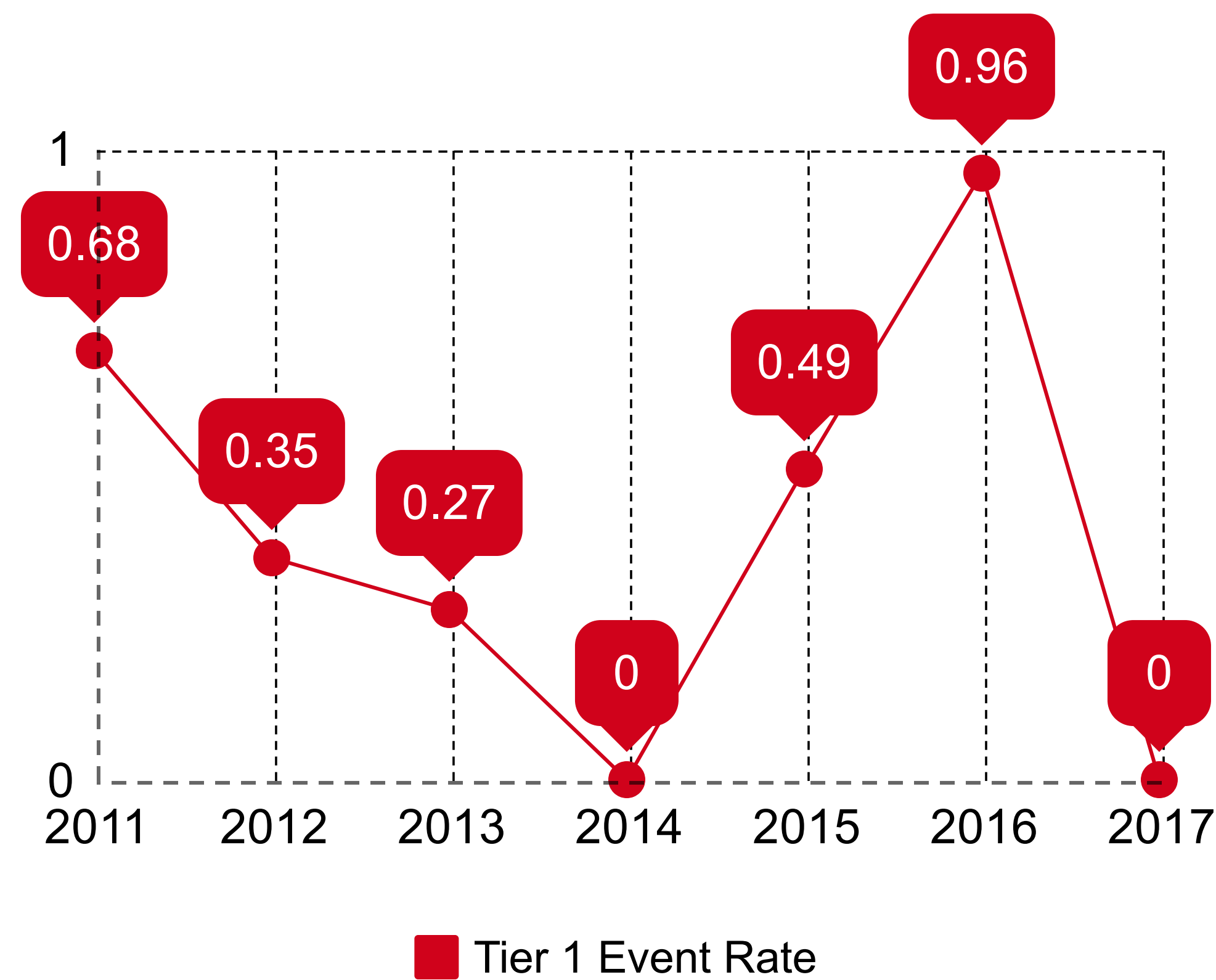
Number of Tier 1 Events



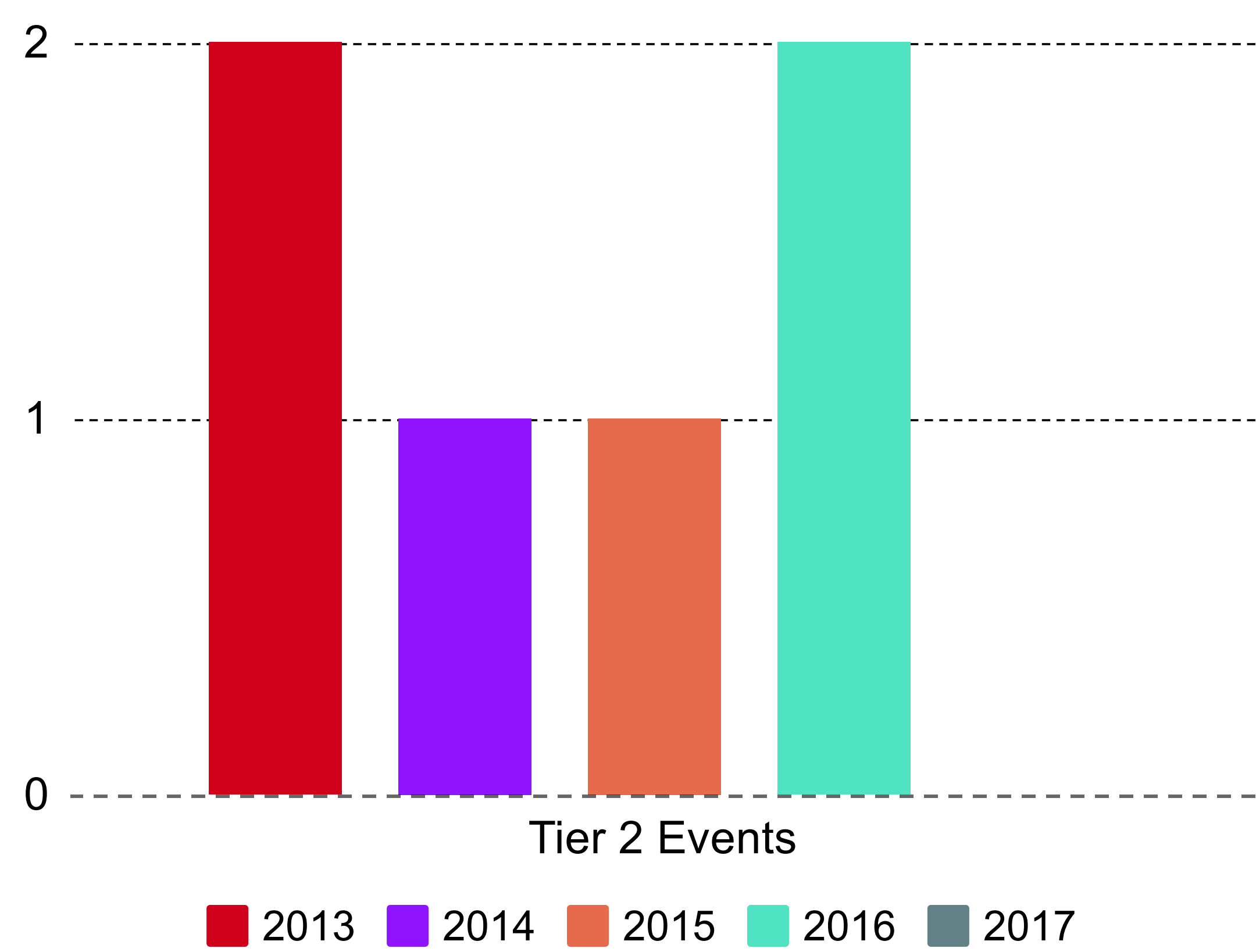
Tier 1 events are significant losses of containment (relevant to the hazard of the product stored).

The number of Tier 1 events experienced by our members are very small, with none reported in 2017. The work that the TSA does with the UK regulator helps to ensure that we operate safely.

Tier 1 Event Rate (per million hours worked)



Number of Tier 2 Events

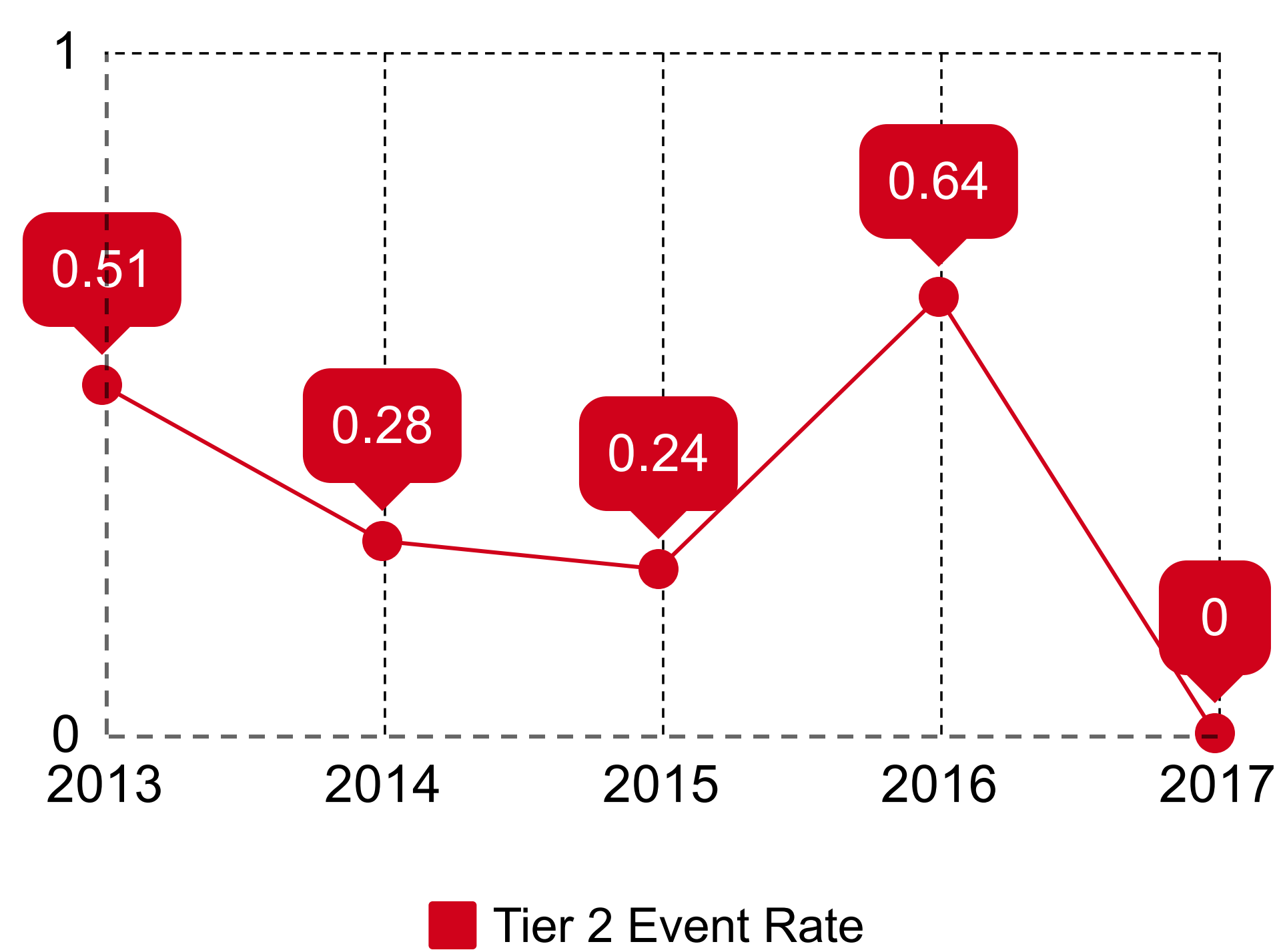


Tier 2 events are smaller losses of containment (relevant to the hazard of the product stored).

The number of Tier 2 events experienced by our members is very small, and do not highlight any significant trends. None were reported in 2017.

Even though we have no Tier 1 or Tier 2 events reported in 2017, this does not mean we are complacent - our members maintain an acute focus on ensuring and maintaining the safety of their people, the environment and their assets.

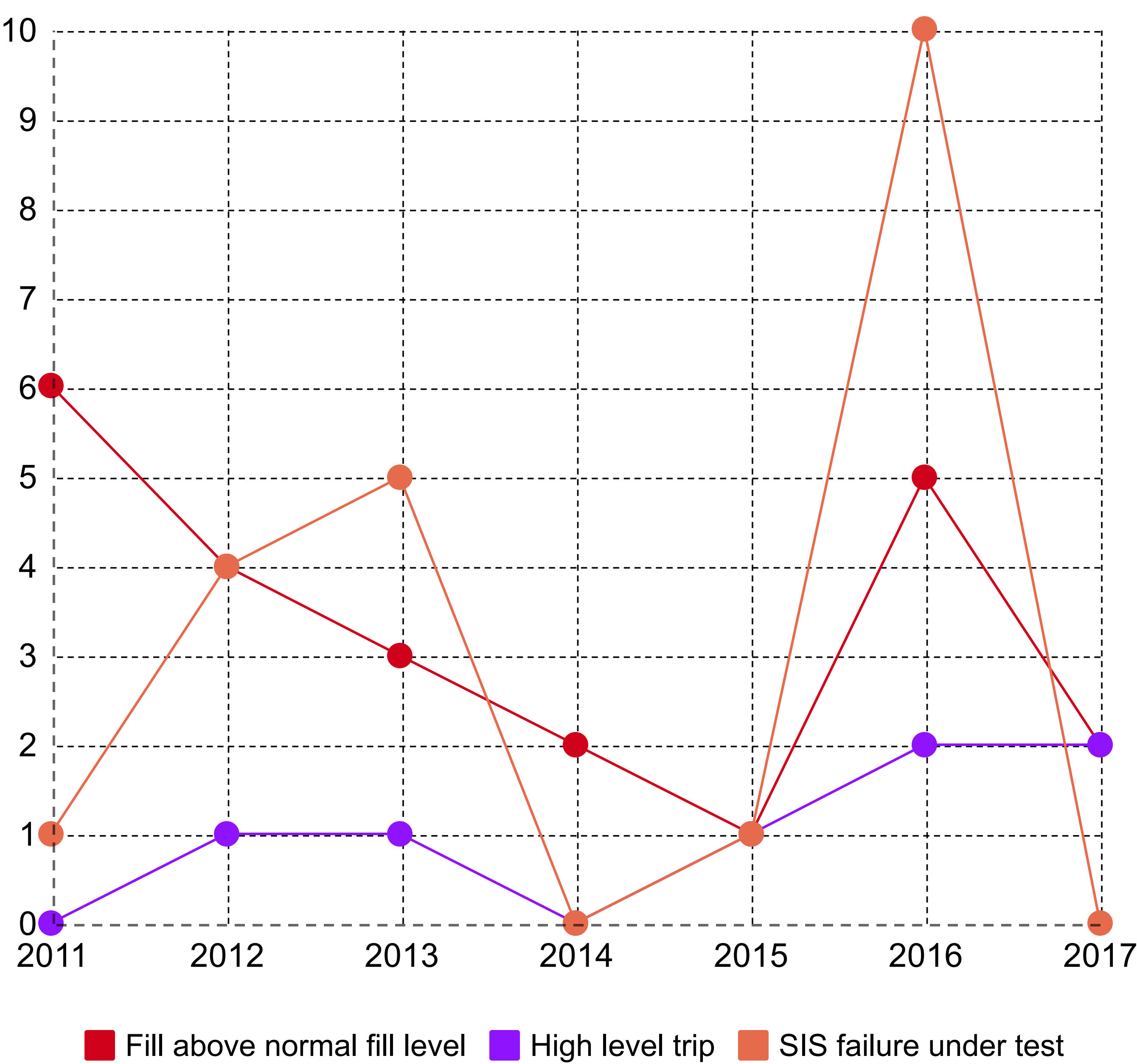
Tier 2 Event Rate (per million hours worked)





Tier 3 indicators (leading indicators) can be extremely useful in identifying areas of weakness before a more significant Tier 1 or Tier 2 event takes place. The TSA uses this information to determine if any further work is required in improving good practice or knowledge and skills.

Tier 3 Leading Indicators



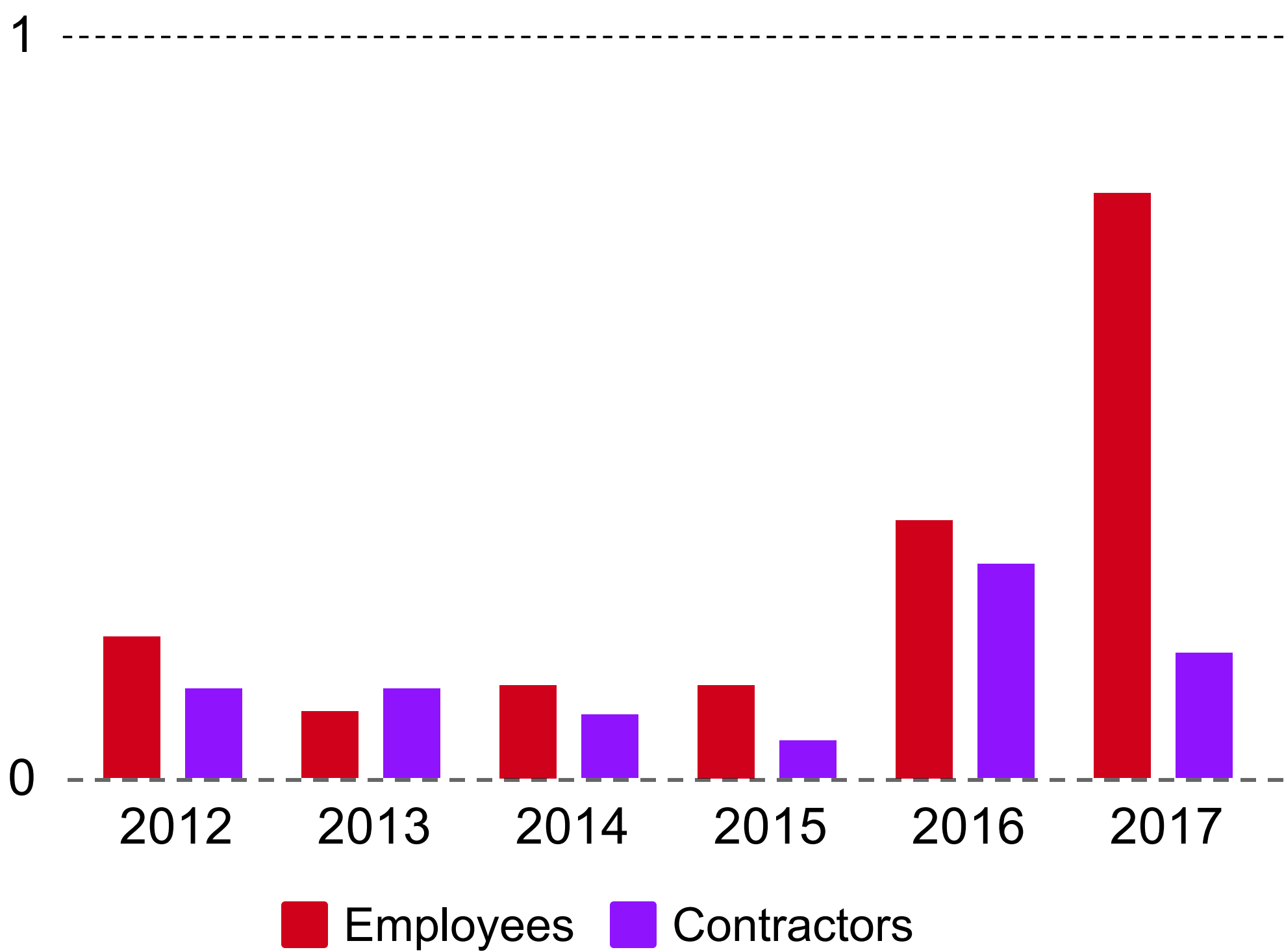
Throughout 2017 we have been sharing safety messages regarding the Tier 3 leading indicators in our quarterly statistical report to members. The TSA is also leading and contributing to several technical working groups in the Chemical and Downstream Oil Industries Forum (CDOIF) and Energy Institute (EI) which are producing guidance to assist in the design, management and maintenance of process facilities.

Occupational health and safety



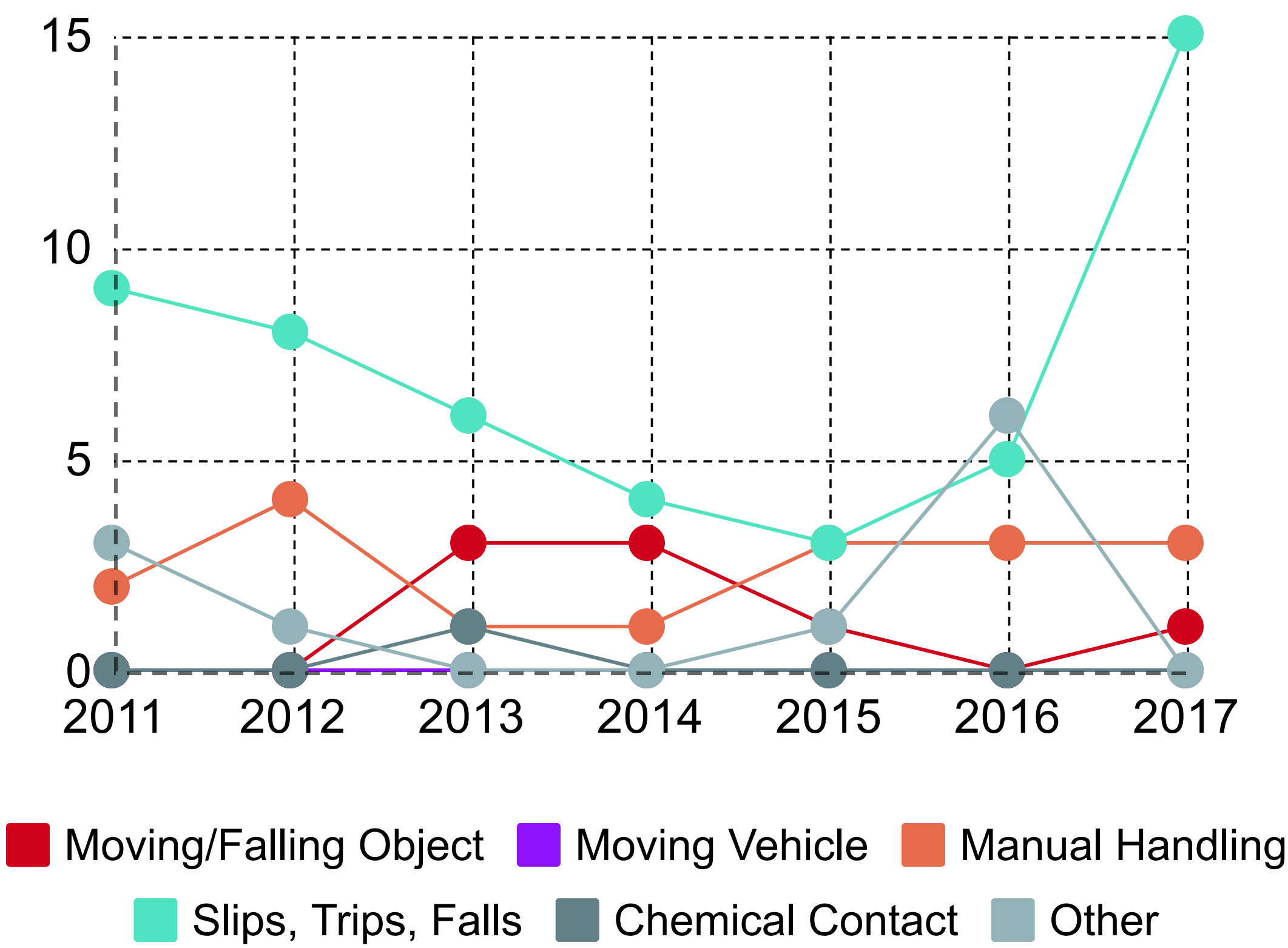
Our members inform the UK regulator in accordance with the requirements of the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR). At the TSA we collate and share this information with our members on a quarterly basis.

RIDDOR LTI Rate (per 100,000 hours worked)



Lost Time Injuries (LTI) are those where an employee or contractor has been away from work due to a work place injury, for more than seven days. This is normalised per 100,000 hours worked to give an LTI Rate.

LTA Cause Analysis

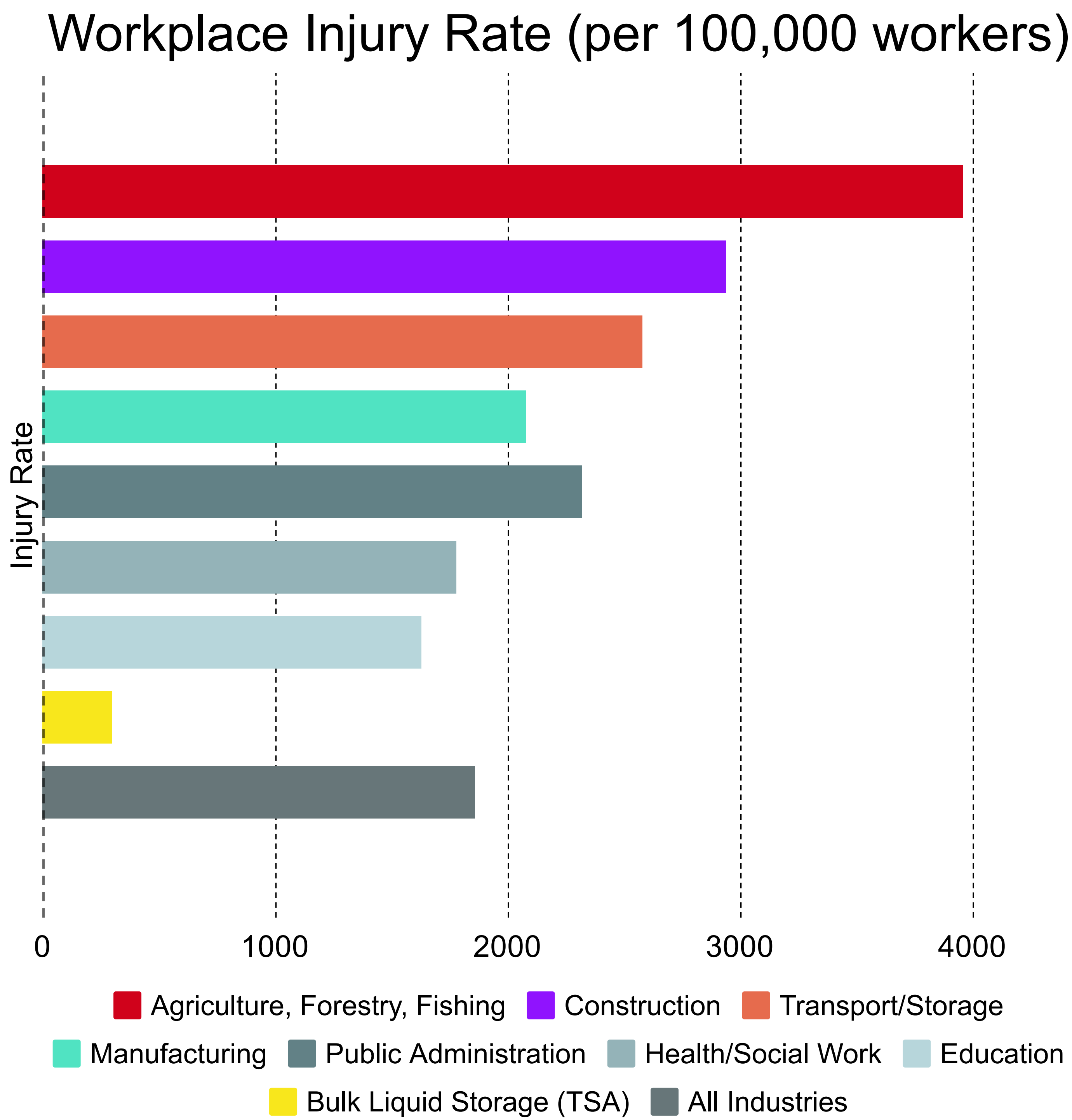


Lost Time Accident (LTA) causes examine the nature of Lost Time Injuries.

The increase in slips, trips and falls in 2017 is likely to be linked to the poor weather conditions experienced towards the end of the year.



The tank storage sector continued to maintain very high standards of occupational safety during 2017. It remains one of the safest industries in the UK with proportionally fewer injuries than almost all other sectors.



Source: HSE RIDDOR Statistics, <http://www.hse.gov.uk/statistics/industry/index.htm>

Our work and achievements



The TSA represents the interests of our members to Government, Regulators and other relevant agencies. We do this by playing a leading role in many different working groups and committees.

We work with other industry sectors and regulators to identify potential areas for improvement or where knowledge and good practice could be extended.

Our areas of influence include:





The TSA has been working hard on behalf of its members throughout 2017.

Much of our work is representing the interests of our membership at the various committees and working groups listed on the previous page. However we also help to develop guidance, respond to government consultations and prepare briefing papers and other publications.

Consultation Responses

- Renewable Transport Fuels Obligation
- Industrial Strategy
- Aviation Strategy
- Security of Network Information Systems
- Downstream Oil Supply Resilience
- Oil Storage Regulations (Scotland)
- Environment Agency Charging
- Flood Preparedness

Guidance

- CDOIF - Installed Safety Instrumented Systems
- CDOIF - Human Factors Review of Procedures
- COMAH Strategic Forum - Understanding collaboration in the high hazard sector
- COMAH Strategic Forum - Managing risk: the hazards that can destroy your business
- EI - Guidance on the integrity of valves
- EI - Pipework inspection research report
- EI - Operation of handheld electronic mobile devices

TSA Papers

- Exiting the European Union - Impact for the bulk liquid storage sector
- Brexit Issues - CHIEF, CDS, EMCS, Customs Warehouse Approvals and EU Acquisitions Taxation and VAT
- CHIEF and EMCS Analysis
- Road to Zero - Formulating a joint industry response
- A forward plan for the Federation of Tank Storage Associations

Conferences and Articles

- IOSH Confined Space Entry, Liverpool
- ACI Bulk Liquid Storage, Dubrovnik
- Fuel Oil News *Bringing fresh focus to the TSA*
- Fuel Oil News, *TSA Conference and Exhibition Report*
- Lube, *TSA Conference and Exhibition Report*
- HazardEx, *Sharing Lessons in Process Safety across the European Union*
- HazardEx, *UK Process Safety Forum-Sharing experience across high hazard sectors*

Join us



We have several membership levels available for businesses storing bulk liquids, port operators and equipment and service providers.

Join us, and influence what matters to you.

Contact us for more information.

	Full Member	Associate Member	Associate Member (Supplier)	Supplier Listing
TSA Committees				
Council	✓			
Annual Networking Lunch	✓			
HR Committee	✓			
SHE Committee	✓	✓	✓**	
Technical Committee	✓	✓	✓	
External Committees, including*				
Federation of European Tank Storage Associations	✓	✓		
COMAH Strategic Forum	✓	✓		
Refinery and Terminal Operators Forum	✓	✓		
Chemical and Downstream Oil Industries Forum	✓	✓	✓	
Downstream Oil Industries Forum	✓	✓		
Downstream Oil Distribution Forum	✓	✓		
Science Industry Partnership	✓	✓	✓	
Process Safety Forum	✓	✓		
Relevant Institute Technical Committees	✓	✓	✓	
Chemical Industry Liaison Group (Environment)	✓	✓		
Alliance of Chemical Associations	✓	✓		
Publications/Website				
TSA Annual Review	✓	✓	✓	
Quarterly and Annual Safety Statistics	✓	✓		
Website - Council Area	✓			
Website - Members Area	✓	✓		
Website - Supplier Listing	✓	✓	✓	✓
Use of TSA Logo	✓	✓	✓	
Member Delegate Rate - TSA Conference	✓	✓	✓	

*TSA Secretariat represents members at these committees. Members will be invited to join relevant working groups and carry out reviews of any proposed legislation, guidance or standards produced.

**Participation by invitation only.



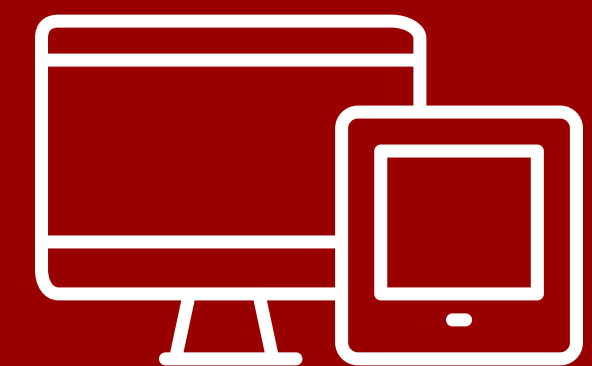
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