



Tank Storage Association

2020

Terminals Fact Sheet



About TSA

The Tank Storage Association is the trade association representing the interests of over 60 member companies engaged in the storage of bulk liquids and the provision of products and services to the sector.

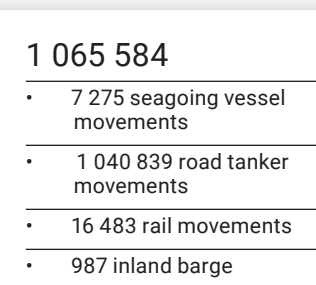
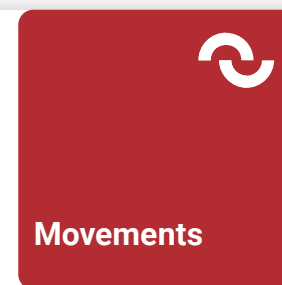
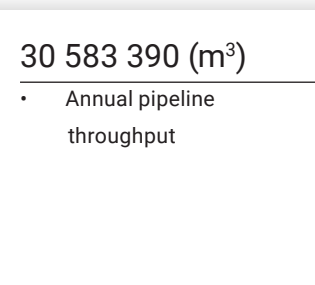
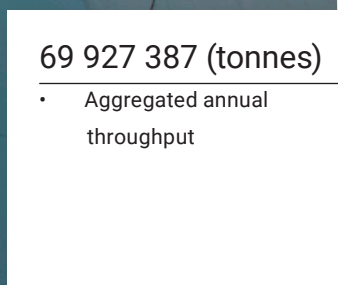
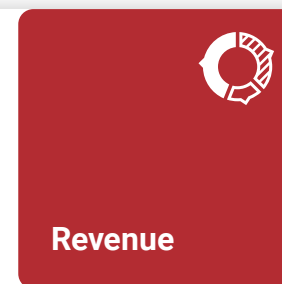
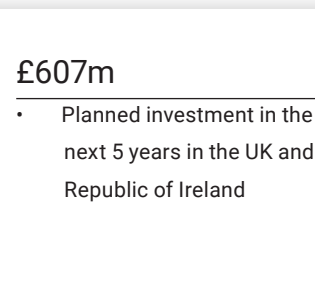
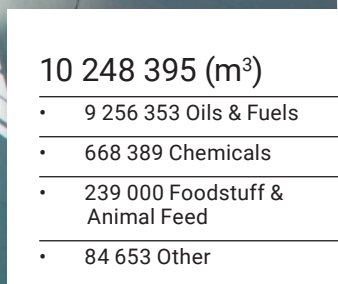
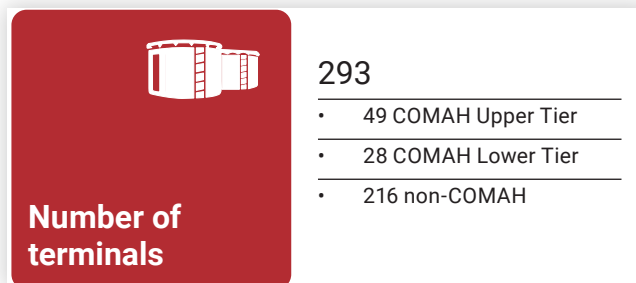
Our members provide and support an essential interface between sea, road, rail and pipeline logistics for a diverse range of essential products, including transport and heating fuels, chemicals, animal feed and foodstuffs. In the process, they are responsible for the direct employment of around 4,000 highly trained, specialised people.

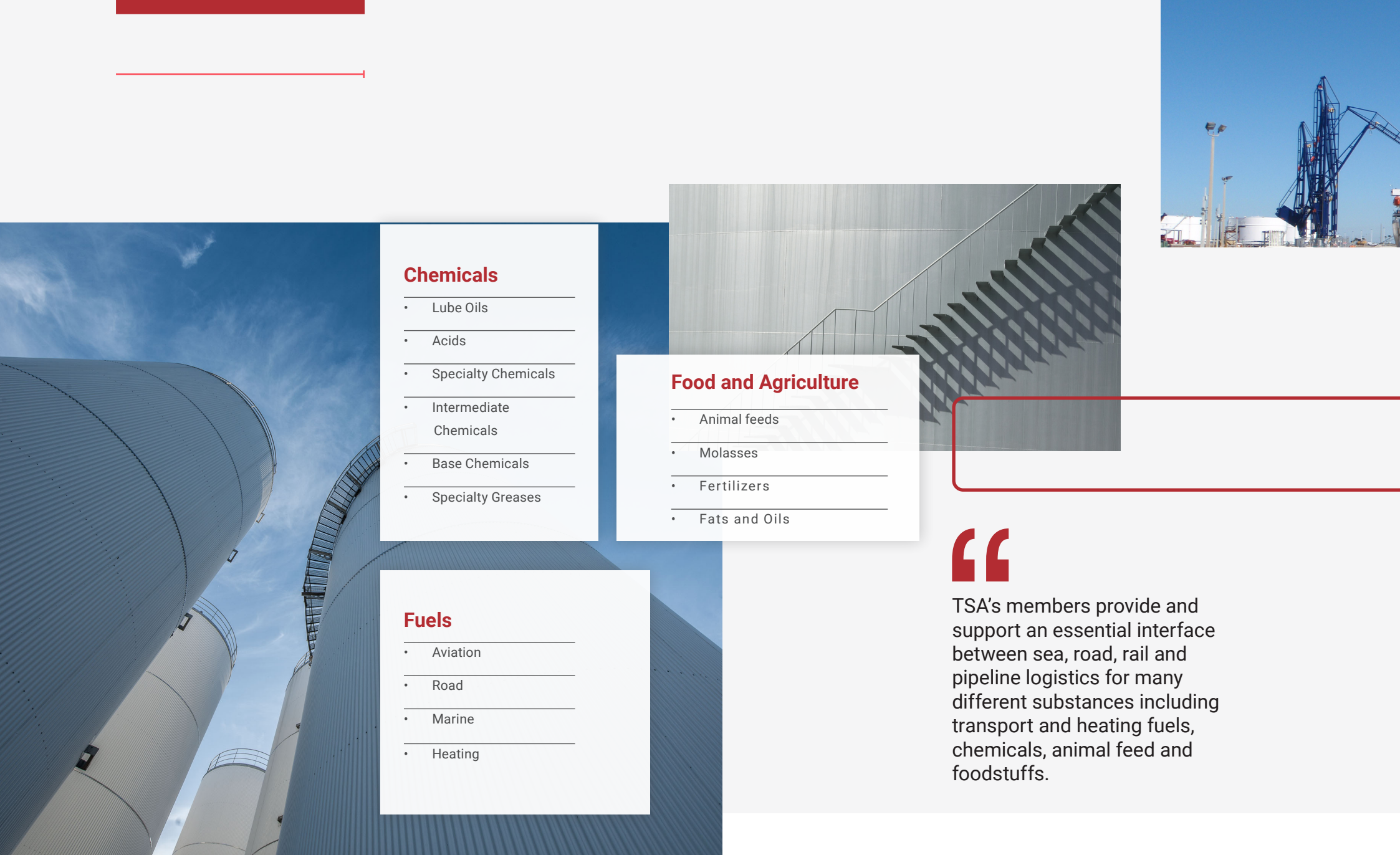
The UK's bulk liquid storage sector supports growth and prosperity by importing, exporting, storing and blending liquid products that are integral to our daily lives. Terminals are critically important in providing the vital interconnection to the various modes of liquid transportation in the UK, such as sea transport, inland barge, road, rail and cross-country pipelines, along with the essential logistics services to transfer bulk liquids from one mode of transportation to another. The sector plays an important role in providing services that are vital to the UK consumer and the blending and transformation of substances that meet the diverse needs of both industry and the public in a safe and cost-effective way.



Critical national infrastructure

Our members operate a variety of terminals across the UK and the Republic of Ireland, storing both hazardous and non-hazardous liquids. Around twenty-two of these terminals are designated by HM Government as Critical National Infrastructure (CNI).





Chemicals

- Lube Oils
- Acids
- Specialty Chemicals
- Intermediate Chemicals
- Base Chemicals
- Specialty Greases

Food and Agriculture

- Animal feeds
- Molasses
- Fertilizers
- Fats and Oils

Fuels

- Aviation
- Road
- Marine
- Heating

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TSA’s members provide and support an essential interface between sea, road, rail and pipeline logistics for many different substances including transport and heating fuels, chemicals, animal feed and foodstuffs.



Bulk liquid terminals

Bulk liquid terminals play a critical role in the logistical supply chain providing an essential interface between different modes of liquid transportation, whether by ship, inland barge, road tanker, rail tanker or pipeline. In principle, any liquid product that is transported in bulk can be stored in a bulk liquid terminal, from transport fuels and petrochemicals to food-grade products.

Many of the strategic terminals in the UK are also designated as Critical National Infrastructure due to their importance in providing energy to industrial, transport and defence markets. In addition, storage

capacity includes strategic reserves held for emergencies and supply disruptions.

Liquid storage terminals also improve the flexibility of the entire supply chain and its ability to respond to market fluctuations by helping to balance out supply and demand and ensuring that critical liquids are supplied when they are needed in the quantities required.

Terminals may either store single products or multiple products within a single facility and can provide supplementary services such as blending,

packaging, canning, drum filling, water treatment and analysis, warehousing, as well as bonded facilities for duty suspended products.

Terminal operations are present throughout the world. However, storage hubs have become established in Europe, the United States, Middle East and Asia to provide the necessary storage required for global commerce in bulk liquids.

Terminal industry supply chain



Import terminals and secondary inland terminals are an essential part of global infrastructure networks, ensuring that bulk liquids are supplied when they are needed in the quantities required.



Fuels



Aviation



Marine



Road



Heating



Chemicals



Lube Oils



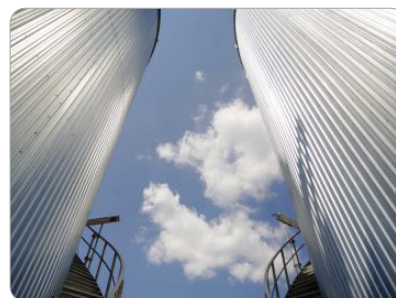
Acids



Intermediate, Specialty & Base Chemicals



Specialty Greases



Food and Agriculture



Animal Feeds



Fertilizers



Edible Oils



Molasses

Enabling The Energy Transition

The bulk liquid storage sector and associated logistics will have a key role to play in the energy transition and in supporting the achievement of the UK's decarbonisation targets. Bulk liquid storage terminals in the UK handle a variety of products each with their own distinct supply chain footprints. Fuels and hydrocarbon derivatives currently account for over 65% of tonnage throughput. As essential energy partners, terminals will continue to

play a critical role by supporting access to traditional and suitable energy alternatives as well as in providing the flexibility needed to integrate these alternatives. That means careful advance planning and management to ensure the supply chain can be maintained in the interim and to minimise change in the consumer experience.

Energy alternatives, new or developing, will have their own characteristics. As essential partners in the energy transition, we are committed to the innovation and evolution that will be necessary to succeed.

Managing both traditional and alternative energy sources will require facility enhancements and a flexible, robust bulk liquid storage sector and associated logistics able to accommodate the wide range of technologies that may be needed in the future. Above all, a constructive and collaborative approach, with clearly defined transition paths and realistic timelines, will be key in enabling the sector to play its part.

For more information, download TSA's report *Enabling the energy transition: the role of the bulk liquid storage* at www.tankstorage.org.uk.

Key recommendations

WORKING TOGETHER, IN PARTNERSHIP WITH INDUSTRY, TO SEIZE OPPORTUNITIES FOR A RESPONSIVE, FLEXIBLE AND ROBUST BULK LIQUID SUPPLY SECTOR.

ENSURING THE ENERGY TRANSITION ADVANCES IN PARALLEL WITH REQUIRED CHANGES IN BULK LIQUID INFRASTRUCTURE BY SAFEGUARDING THE BENEFITS OF A SAFE AND RESILIENT BULK LIQUID STORAGE SECTOR AND ASSOCIATED SUPPLY CHAIN.

SETTING CLEARLY DEFINED TRANSITION PATHS AND REALISTIC TIMELINES TO ENABLE A STABLE LANDSCAPE FOR LONG-TERM INVESTMENTS AND AVOID DELAYS CAUSED BY THE LACK OF NEW TRANSITIONAL NATIONAL INFRASTRUCTURE.

ENSURING THAT POLICIES ARE COHERENT AND SUPPORTIVE OF THE BROAD RANGE OF SOLUTIONS NECESSARY TO SUCCEED, WHILE ADOPTING A TECHNOLOGY NEUTRAL APPROACH.

EMPOWERING INDUSTRY BY FACILITATING DIALOGUE, COOPERATION AND KNOWLEDGE TRANSFER IN THE AREA OF SAFETY, IN THE CONTEXT OF ALTERNATIVE ENERGY SOLUTIONS.





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