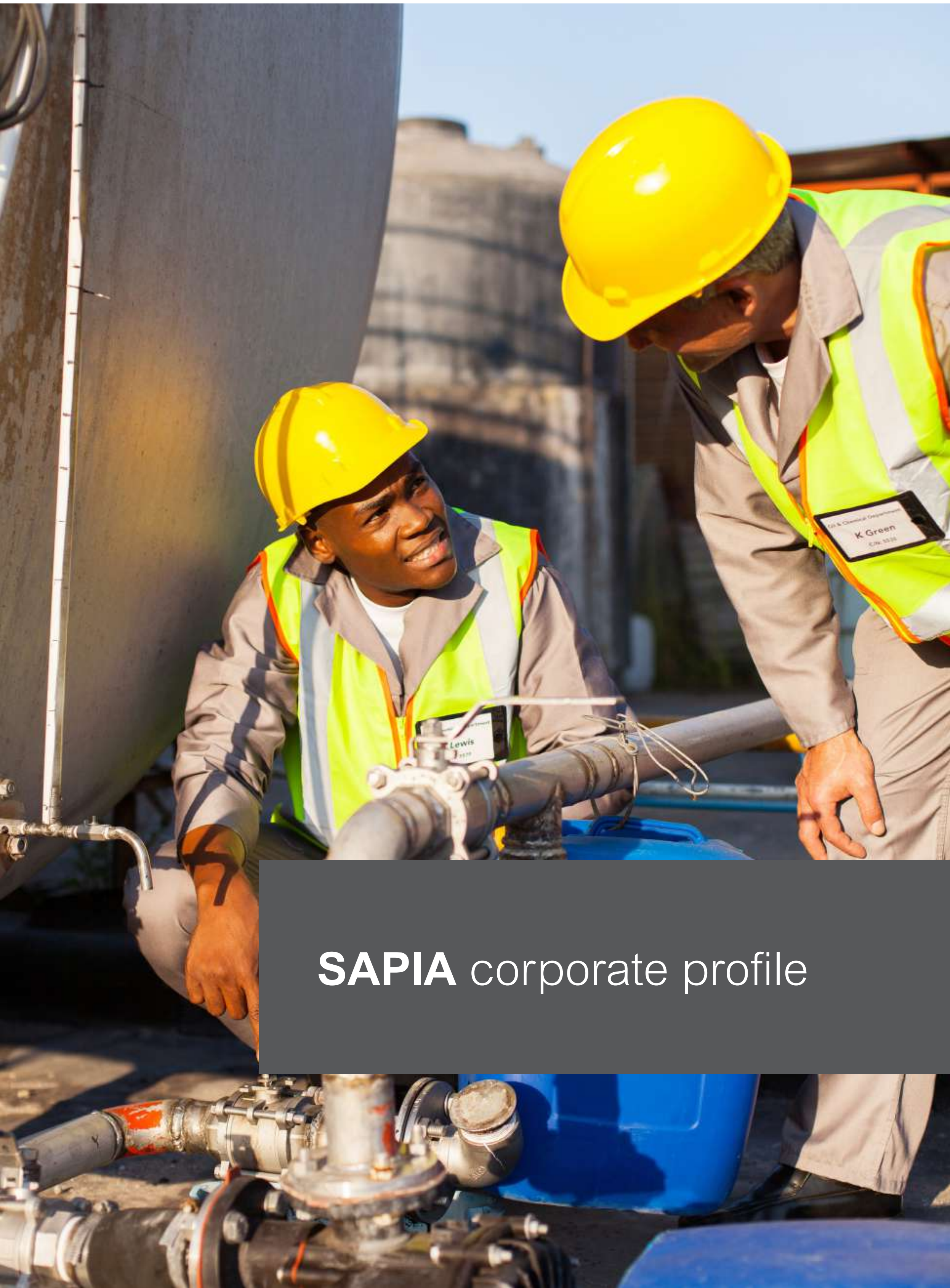
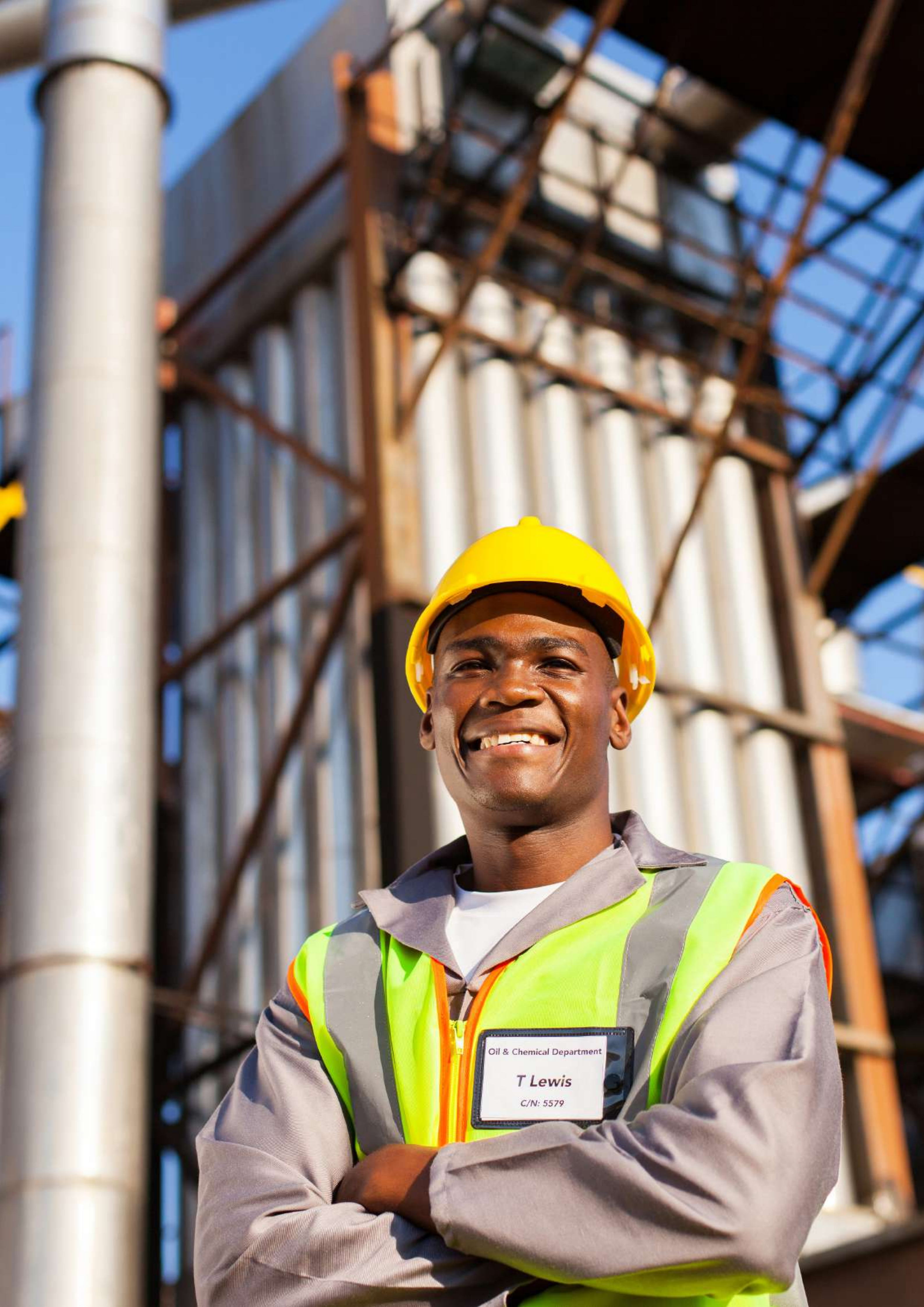
sapia | South African Petroleum Industry Association



SAPIA corporate profile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SAPIA overview

About SAPIA

SAPIA is the voice of the South African petroleum industry. The association plays a strategic role in addressing a range of common issues relating to the importing, refining, distribution and marketing of petroleum products, as well as promoting the industry's environmental and socio-economic progress. SAPIA fulfils this role by engaging with key stakeholders, providing research information, expert advice and communicating the industry's views to government, members of the public and the media.

Vision

SAPIA aspires to be a respected, reputable and value adding industry association.

Mission

Working together within the petroleum industry to promote inclusive social and economic growth.

Strategy

The Board of Governors identified six strategic focus areas that will enable SAPIA to deliver on its mandate in the most effective way.

TRANSFORMATION	Promote industry transformation and skills development.
HEALTH, SAFETY, SECURITY AND ENVIRONMENT	Promote health, safety, security and environmental leadership within the industry.
CLIMATE CHANGE	Provide input into the development of climate change policy and regulations including that pertaining to the monitoring, measuring and reporting of GHG emissions.
SECURITY OF SUPPLY	Facilitate the security of supply of petroleum products.
CLEANER FUELS	Make the transition to cleaner fuels in a manner that avoids any supply disruptions in the most cost-effective way possible.
REGULATED PRICE ELEMENTS	Contribute to policy formulation, implementation and a fair regulatory framework for all.

Figure 1 SAPIA's strategic focus areas

ORGANISATION STRUCTURE

Members

SAPIA was established in 1994 to represent the collective interests of the South African liquid fuels industry. SAPIA opened its membership in 2012 to accommodate both existing and potential marketers in the petroleum and refinery market. Integrated members have refining, wholesaling and retailing assets whereas non-integrated members do not have refining assets.

Integrated members	Non-integrated members	
	Fuel wholesalers	LPG wholesalers
• BP Southern Africa (Pty) Ltd • Chevron South Africa (Pty) Ltd • Engen Petroleum Ltd • PetroSA (Pty) Ltd • Sasol Ltd • Shell South Africa (Pty) Ltd • Total South Africa (Pty) Ltd	• Afric Oil (Pty) Ltd • Camel Fuels (Pty) Ltd • Elegant Fuel (Pty) Ltd • Gulfstream Energy (Pty) Ltd • Imbizo Petroleum Traders (Pty) Ltd • Makwande Energy Trading (Pty) Ltd • MBT Petroleum (Pty) Ltd • Puma Energy SA (Pty) Ltd • Royale Energy Ltd	• African Oxygen Ltd • Avedia Energy (Pty) Ltd • Easigas (Pty) Ltd • Oryx Oil South Africa (Pty) Ltd • Totalgaz Southern Africa (Pty) Ltd • Wasaa Gasses (Pty) Ltd

Table 1 *SAPIA members in 2016*

The Board of Governors

The Board of Governors consists of nine representatives from member companies - the Chairperson and Vice Chairperson rotate annually. The Board of Governors convenes at least four times per year and more often should circumstances require it. The primary function of the Board is to identify key issues facing the industry, agree on solutions in respect of each issue and ensure that resources are available to address the matters at hand.

The SAPIA team

SAPIA has a highly skilled staff complement, led by the Executive Director. SAPIA staff are independent of the member companies. There are a number of committees comprising of technical and operational experts from the member companies who are responsible for executing the SAPIA strategy.

THE PETROLEUM REFINING INDUSTRY IN **SOUTH AFRICA**

Refined petroleum products are produced by the following methods in South Africa:
• crude oil refining;
• coal-to-liquid fuels and gas-to-liquid fuels.

There are six refineries in the country - four at the coast and two inland.

SOUTH AFRICAN REFINERY OWNERSHIP AND CRUDE THROUGHPUT

Crude oil refined at the following refineries:		
Name	**Crude throughput (2015)**	**Ownership**
Chevref	100 000 barrels per day	Chevron South Africa
Enref	120 000 barrels per day	Engen Petroleum
Natref	108 000 barrels per day	Sasol/Total South Africa (64%/36%)
Sapref	180 000 barrels per day	Shell South Africa/BP Southern Africa (50%/50%)
Coal and gas processed and refined at:		
Sasol Secunda	150 000 barrels per day	Sasol
(Crude equivalent at average yield)		
Gas processed and refined at:		
PetroSA	45 000 barrels per day	PetroSA
(Crude equivalent at average yield)		

***Table 2** South African refinery ownership and crude throughput*

PETROLEUM PRODUCTS CONSUMPTION

12 billion litres per annum of petrol

14 billion litres per annum of diesel

2.4 billion litres per annum of jet fuel

588 million litres per annum of LPG

573 million litres per annum of paraffin

591 million litres per annum of fuel oil

** 2015 figures*

FAST FACTS

3 904 **branded service stations** owned by SAPIA members

APPROXIMATELY **180** **depots** owned by SAPIA members

3 300 **kms of trunk pipelines** for the transport of petroleum products

First industry to sign a sectoral charter in November 2000

WORKFORCE **PROFILE**

The table below reflects the combined workforce profile for direct employees of SAPIA member companies and its refineries. The last column lists employees with disabilities.

Occupational level	Gender	African	Coloured	Indian	White	Foreign national	Total	People with disabilities
Top management	Female	14	6	4	6	1	31	0
	Male	10	10	4	25	25	74	1
Top management total		**24**	**16**	**8**	**31**	**26**	**105**	**1**
Senior management	Female	55	28	18	36	1	138	0
	Male	103	53	54	124	26	360	6
Senior management total		**158**	**81**	**72**	**160**	**27**	**498**	**6**
Specialists & mid-management	Female	300	191	108	222	9	830	4
	Male	453	298	255	378	38	1 422	19
Specialists & mid-management total		**753**	**489**	**363**	**600**	**47**	**2 252**	**23**
Skilled technical	Female	606	330	122	182	2	1 242	20
	Male	808	384	218	241	7	1 658	32
Skilled technical total		**1 414**	**714**	**340**	**423**	**9**	**2 900**	**52**
Semi-skilled	Female	296	78	23	45	1	443	16
	Male	1 290	220	87	58	13	1 668	13
Semi-skilled total		**1 586**	**298**	**110**	**103**	**14**	**2 111**	**29**
Unskilled and defined decision making	Female	26	6	1	3	0	10	10
	Male	141	15	3	3	4	19	19
Unskilled and defined decision making total		**167**	**21**	**4**	**6**	**4**	**202**	**29**

Table 3 *Workforce profile in October 2015 as reported to the Department of Labour*

ECONOMIC **CONTRIBUTION**

The liquid fuels industry plays a vital role in the economy by enhancing employment and development opportunities for South Africa.

The South African petroleum industry accounts for:
- R330 billion in turnover
- R83 billion in duties and levies
- R6 031 billion in capital expenditure
- R6 billion in annual payroll
- R4 billion in income tax
- 8.5% of national GDP

The energy industry is undoubtedly an engine of growth for the economy. Its products contribute towards nearly every commodity and service available. The industry also plays a part in economic growth and employment by providing:

- 750 000 direct and indirect jobs (4.9% of formal employment)
- 4 jobs per R1 million of investment
- an additional R1.57 to the economy for every R1 spent
- an additional 38c to government revenue for every R1 spent
- R70 million in CSI contributions - R27.4 million in education, R26.6 in community related projects

(* 2016 figures from KPMG)

CONTACT **DETAILS**

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