FUELS INDUSTRY
Association of South Africa

2024
ANNUAL REPORT


P3

Contents

Report by Fuels Industry Association of South Africa Chairperson

Welcome to the Fuels Industry Association of South Africa's 2024 Annual Report which provides stakeholders with comprehensive insights into industry developments over the past year.

Seelan Naidoo
CHAIRPERSON, FUELS INDUSTRY ASSOCIATION OF SOUTH AFRICA

Key focus areas

The Board of Governors identified the following focus areas for the year:

1	TNPA Lease Regime	The current lease regimes at the ports remain inadequate and if the Transnet National Ports Authority (TNPA) implements the provisions of the National Ports Act (NPA), it will significantly impact investments and operations, particularly within the Island View Precinct. The Fuels Industry Association continues to engage stakeholders to ensure that regulatory changes support industry sustainability and economic growth and local employment.
2	Regulatory Accounting System (RAS) Review	The Association is actively engaging the Department of Mineral Resources and Energy (DMRE) regarding a comprehensive review of the Regulatory Accounting System (RAS), which seeks to segment the petrol value chain into distinct components and allocate returns based on associated costs and investments. Ensuring a transparent and fair pricing mechanism is critical to the sector's sustainability.
3	Basic Fuel Price (BFP) Coastal Storage	A misalignment exists between the coastal storage component within the Basic Fuel Price (BFP) and the maximum storage rates published by the National Energy Regulator of South Africa (NERSA). This issue may have implications for the development of coastal storage infrastructure, requiring urgent regulatory alignment.
4	Customs and Excise Regime	The Customs and Excise Act, originally designed for a market dominated by domestically refined products, has not been updated to reflect current and future realities concerning refining, imports, and exports. The necessary amendments will take time to implement, and the Association is advocating for a more agile regulatory framework that ensures business continuity while protecting the fiscus.
5	Kerosene Taxation and Fuel Adulteration	The adulteration of diesel with paraffin continues to pose significant risks to consumers, national revenue and the fuel sector. Current enforcement measures remain inadequate, necessitating stronger regulatory interventions and industry cooperation to mitigate this challenge.
6	Security and Organised Crime	Recognising the escalating threats posed by organised crime within the sector, the Association Security Committee conducted a comprehensive risk assessment. This has informed the development of a targeted response plan to safeguard infrastructure and supply chains.

Strategic focus areas

Beyond the identified priorities, this report outlines progress in the following key strategic areas:

Transformation
- Skills development framework
- New liquid fuels empowerment framework

Health, safety, security, and environment (HSSE)
- Regulatory input
- Addressing new and emerging risks
- Enhancing oil spill response capabilities
- Contaminated land management
- Strengthening contractor and stakeholder capabilities
- Security risk management
- Road transport safety risk management

Energy transition
- Enactment of the Climate Change Act
- Phase 2 of the Carbon Tax proposal
- Updates to petroleum product standards
- Introduction of sustainable, low-carbon fuel alternatives
- National Adaptation Strategy and Plan
- Greenhouse gas regulations
- Carbon Tax Act implementation

Security of supply
- Jet fuel supply to O.R. Tambo International Airport
- TNPA leasing strategy
- Competition Commission exemption applications
- Tank farm relocations from Port of Port Elizabeth to Port of Ngqura

Regulated price elements
- Petroleum product price developments
- RAS review
- Petroleum pipeline industry levy for 2024/25

30th anniversary conference

On 11 July 2024, the Fuels Industry Association of South Africa commemorated its 30th anniversary with a landmark conference in Sandton, Johannesburg. The event featured esteemed speakers from government and industry, offering invaluable insights into the evolving energy landscape. This premier gathering facilitated knowledge sharing and networking among executives and professionals at the forefront of the sector's transformation.

The future of the Association

As global energy markets transition towards low-carbon economies, the South African transport sector faces significant challenges in reducing its reliance on fossil fuels. The Association fully supports the government's Just Energy Transition programme, which includes developing standards for fuels derived from fossil sources, sustainable carbon-based alternatives, and green hydrogen. This strategic shift is reflected in the Association's rebranding from SAPIA (South African Petroleum Industry Association), details of which are outlined in this report.

Acknowledgments and Board appointments

I remain confident that the Association will continue delivering value to all stakeholders by driving the changes outlined in this report. I extend my sincere gratitude to the Board of Governors for their unwavering commitment over the past year.

On behalf of the Board, I am pleased to welcome our newly appointed board members: Dumisani Bengu, Nona Chilli, Pam Indurjeeth, Tumelo Ramalebana, Mduduzi Lokotfwako, Keletile Ramuthivheli, Olagoke Aluko, and Xolile Sizani.

We also extend our deepest appreciation to outgoing board member Marcia Kane-Garcia for her invaluable contributions to the Fuels Industry Association of South Africa.

SCAN HERE TO VIEW FUELS INDUSTRY ASSOCIATION MANIFESTO VIDEO

Introduction by Fuels Industry Association of South Africa Chief Executive

Avhapfani Tshifularo
CHIEF EXECUTIVE, FUELS INDUSTRY ASSOCIATION OF SOUTH AFRICA

This year we held our 30th anniversary conference where we also revealed our name change from the South African Petroleum Industry Association (SAPIA) to the Fuels Industry Association of South Africa. This change reflects our commitment to a sustainable future for the fuels industry, as a voluntary trade association that represents member companies on common interests and issues in the fuels industry in South Africa.

The transition from The South African Petroleum Industry Association to The Fuels Industry Association of South Africa marks a significant evolution in our mission. It extends our reach across various energy solutions that will power both current and future mobility needs. This change better reflects our growing focus beyond traditional petroleum to a broader range of energy sources. Our rebranding also responds to environmental imperatives, such as the need to improve air quality and reduce greenhouse gas emissions from the transport sector.

The Association's new logo features a honeycomb structure symbolising strength, efficiency, and collaboration. Honeycombs are renowned for their geometric efficiency and are often cited as one of the most effective ways to optimise space and build strength with minimal material. This aligns perfectly with the fuel industry's goals of maximising efficiency and resource use.

The change to the honeycomb design represents a deliberate shift towards a more inclusive and environmentally conscious branding. This change not only reflects the feedback from our members but also the Association's strategic vision for the future – a commitment to leading the transformation in the fuels industry towards a sustainable and diverse energy landscape. This logo is testament to our dedication to innovation, collaboration, and sustainability.

Looking at the industry's progress and achievements detailed in this report, and as we celebrate our 30th anniversary, we are reminded that together we can achieve far more than we can as separate entities. I would like to thank the DMRE, the Board of Governors, the Association staff members and committees for their valuable contributions over the past year. I look forward to working with you this coming year as we chart the way forward to an energy secure future.


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SHELL DRAUGEN BLOKK 6407/9

Association overview

ABOUT THE ASSOCIATION

Vision

The Fuels Industry Association of South Africa aspires to be a respected, reputable and value adding industry association.

Mission

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

Objectives and strategy

- Understand our stakeholders' needs
- Provide expert information and assistance to our stakeholders
- Contribute to policy formulation and implementation
- Promote industry transformation, health, safety, security & environmental leadership and a fair regulatory framework for all
- Facilitate security of supply
- Enhance the reputation of the industry by communicating its contribution to economic and social progress

PRIORITIES FOR THE YEAR

The Board of Governors identified the following focus areas for 2024:

1	TNPA lease regime	The lease regimes at the ports are not satisfactory with the TNPA endeavouring to implement provisions of the NPA that will significantly affect investments and operations particularly at IV.
2	RAS review	Engaging the DMRE regarding a complete review of the RAS that seeks to break down the petrol value chain into discrete buckets assigning returns to each stage of the value chain based on costs and investments.
3	BFP – coastal storage	The coastal storage element in the BFP does not conform to maximum storage rates as published by NERSA – this can have implications for the development of storage facilities along the coast.
4	Customs and excise regime	The Customs and Excise Act was developed when locally refined product supplied most requirements. The Act has not been updated to reflect current and projected future reality with respect to refining, import and exports of product. The changes will take time to affect.
5	Kerosene taxation	The adulteration of diesel with paraffin presents serious concerns to oil companies, consumers and the fiscus. Efforts by the authorities are insufficient to address the problem.
6	Security	The Association's Security Committee conducted a risk assessment into organised crime affecting the sector in order to develop the response plan to address the identified risks.

MEMBERSHIP

Category A members	**Category B members (Petrol & Diesel)**	**Category B members (Liquid Petroleum Gas)**
1. Astron Energy (Pty) Limited	1. African Forwarding and Shipping (Pty) Limited	1. Easigas (Pty) Limited
2. BP Southern Africa (Pty) Limited	2. Carbonado Energy	2. Oryx Gas (Pty) Limited
3. Engen Petroleum Limited	3. Dan-Bunkering (Pty) Limited	3. Petregaz (Pty) Limited
4. PetroSA Limited	4. Elegant Fuel (Pty) Limited	4. Totalgaz Southern Africa (Pty) Limited
5. Puma Energy (Pty) Limited	5. FFS Refiners (Pty) Limited	5. Wasaa Gasses (Pty) Limited
6. Sasol Oil (Pty) Limited	6. Gulfstream Energy (Pty) Limited	
7. Shell Downstream South Africa (Pty) Limited	7. Makwande Energy Trading (Pty) Limited	
8. TotalEnergies Marketing South Africa (Pty) Limited	8. Petrocam (Pty) Limited	
9. Vopak (Pty) Limited	9. Royale Energy Limited	

***Table 1** The Association's 23 members in 2024*

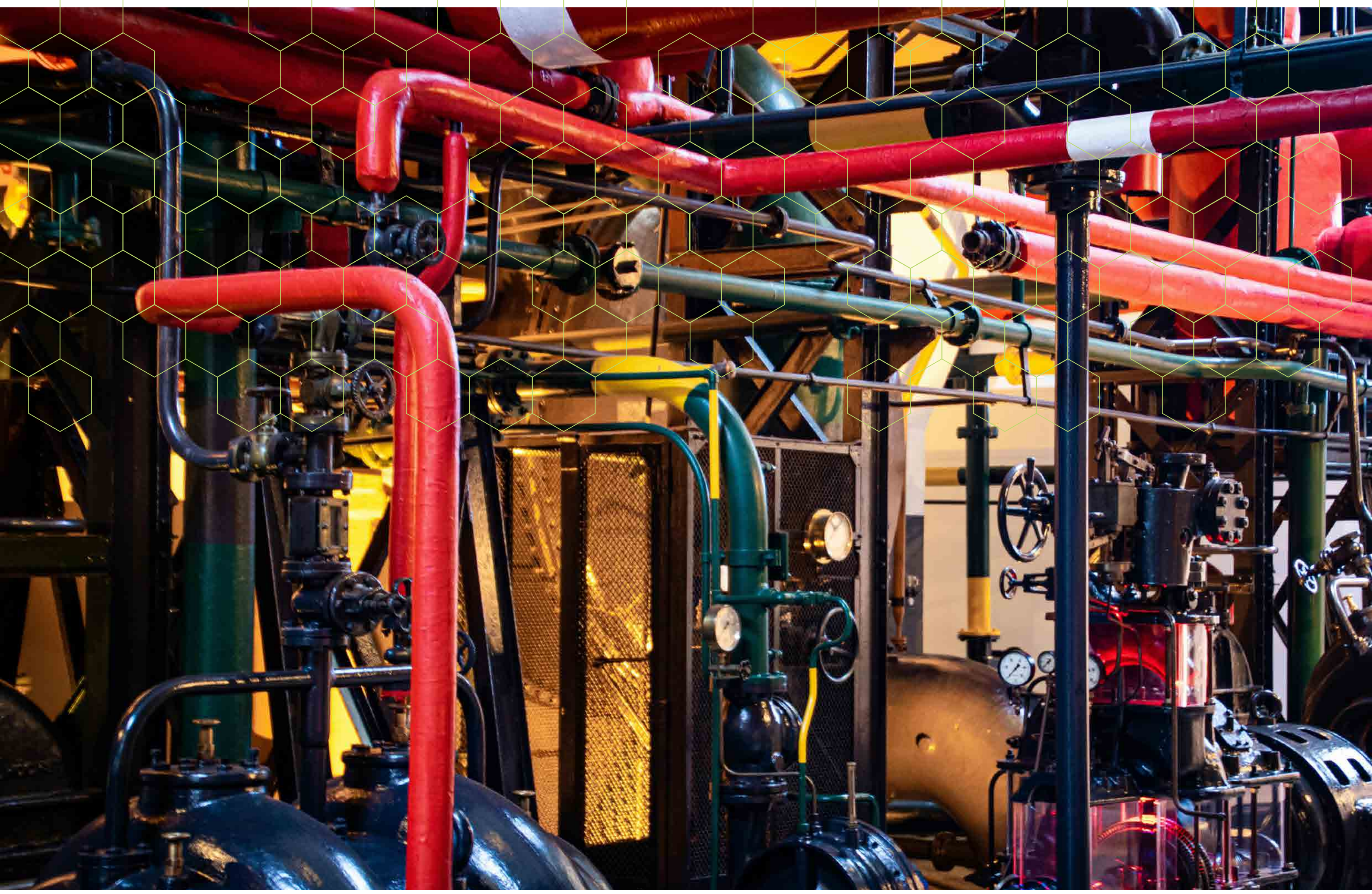
The 2024 Board of Governors

Seelan Naidoo
FUELS INDUSTRY ASSOCIATION OF SOUTH AFRICA CHAIRPERSON

ENGEN
Alternate: Johan Kleyn

Aluwani Museisi
FUELS INDUSTRY ASSOCIATION OF SOUTH AFRICA VICE CHAIRPERSON

SHELL DOWNSTREAM
Alternate: Hemant Lala



Thabiet Booley
ASTRON ENERGY
Alternate: Gosiame Khoele

Taelo Mojapelo
BP SOUTHERN AFRICA
Alternate: Hamlet Morule

Xolile Sizani
PETROSA

Dumisani Bengu
SASOL OIL
Alternate: Keletile Ramuthivheli

Oliver Naidu
VOPAK SOUTH AFRICA DEVELOPMENT
Alternate: Pavan Maharaj

Nona Chili
MAKWANDE ENERGY

Pam Indurjeeth
ORYX GAS SA

Tumelo Ramalebana
PUMA ENERGY SA
Alternate: Mduduzi Lokotfwako

Olagoke Aluko
TOTAL ENERGIES
Alternate: Sunil Gandhi

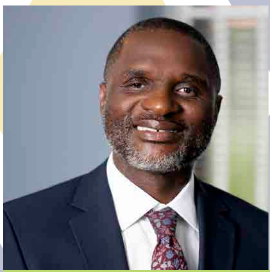
Attendance at board meetings

Attendance at meetings:	04/04/2024	11/06/2024	03/09/2024	03/12/2024
Mr S Naidoo	Y	N	Y	Y
Mr A Museisi	Y	Y	Y	N
Mr T Booley	N	N	N	N
Ms T Mojapelo	N	N	Y	N
Mr D Bengu	-	-	N	N
Ms B Mathibe	Y	Y	R	R
Ms N Chili	Y	Y	Y	N
Ms P Indurjeeth	Y	Y	N	Y
Mr X Sizani	N	N	N	N
Mr T Ramalebana	-	-	Y	Y
Ms M Kane-Garcia	N	Y	N	R
Mr Olagoke Aluko	-	-	-	N
Mr O Naidu	N	N	N	N

Y Attended meeting
N Apology received
- Not yet appointed
R Resigned from the board

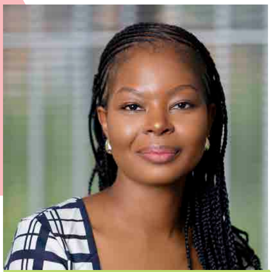
***Table 2** Board meeting attendance*

ASSOCIATION STAFF MEMBERS



Chief Executive
Avhapfani Tshifularo

Office Manager
Nkhensani Lokwe



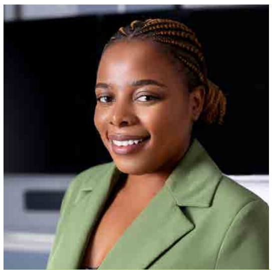
Head: Communications
Phila Mzamo

Head: Economic Regulation
Xoliswa Macingwane

Head: Health, Safety, Security and Environment
Fatima Shaik

Head: Security of Supply
Siganeko Magafela

Head: Strategic Projects
Kevin Baart



Intern
Cindy Mudinda

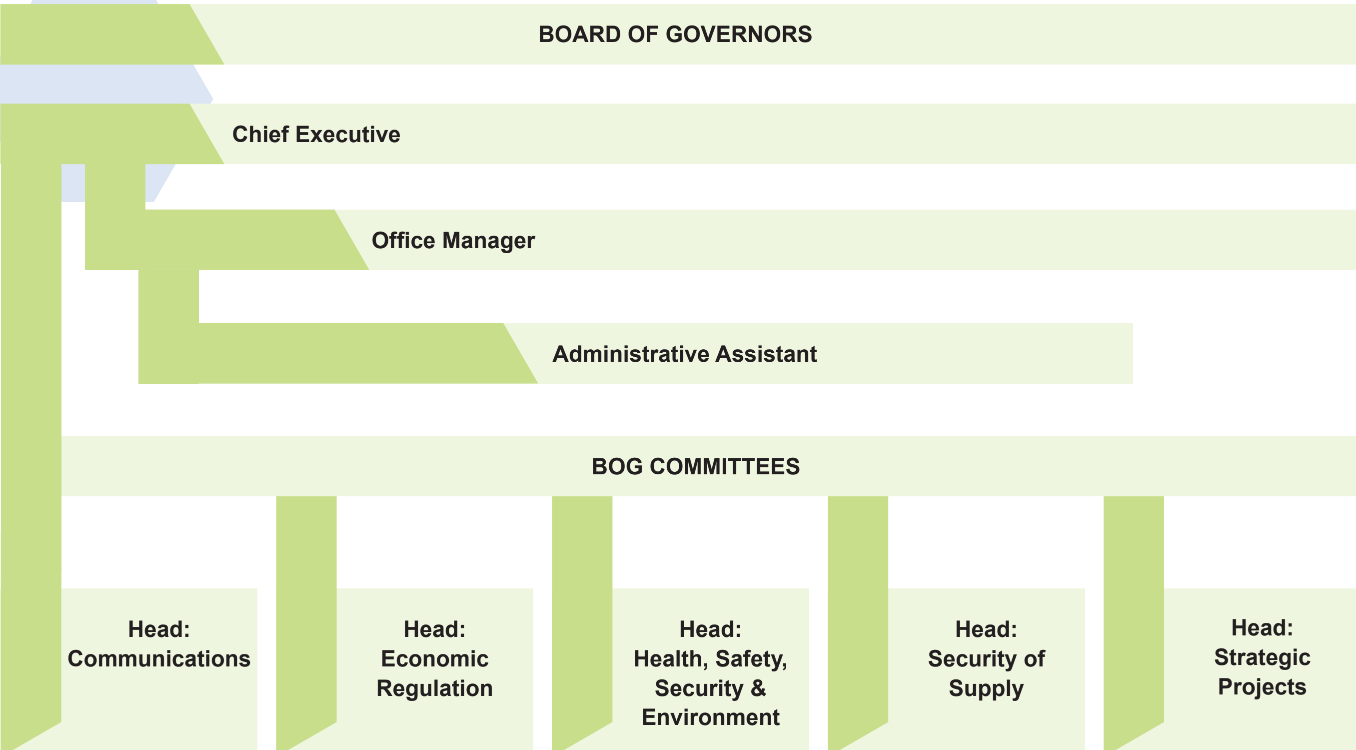


Figure 3 *Fuels Industry Association of South Africa organisational structure*

Board of Governors committees

There are twelve committees and six sub-communities which comprise of individuals from member companies and Association staff members. These committees engage on non-competitive issues and are fully aware of competition laws and the risks of anti-competitive behaviour.

The following committees exist to address strategic issues facing the industry:

The following committees / task teams are appointed by the Board of Governors:	
1. Advocacy and Communications Committee	
2. Economic Regulation Committee	
3. Energy Transition Committee	
4. Fuels Technical Committee	
5. Health, Safety, Security & Environment Committee	5.1 Health & Safety Terminals and Retail Committee
	5.2 Health & Safety Refinery Committee
	5.3 Process Safety Committee
	5.4 Road Safety Committee
	5.5 Security Committee
	5.6 Refinery Environmental Committee
	5.7 Environment and Contaminated Land Committee
	5.8 Marine Pollution Preparedness and Response Committee
	5.9 Petrochemical Fire Safety Committee
6. Legal Committee	
7. Liquefied Petroleum Gas Committee	
8. Refinery Managers' Forum	
9. Security of Supply Committee	
10. Transformation Committee	10.1 Human Resources Development Task Team

***Table 3** Fuels Industry Association of South Africa committees*

Financial statement

The Fuels Industry Association of South Africa's expenditures are essentially funded by the annual contributions of its members. Personnel costs represent the biggest share of the Fuels Industry Association of South Africa's expenditure. Other expenditures cover office accommodation, representation and travel, consultants, lawyers and auditors.

Income (thousand rands)	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Membership subscriptions	9 754	12 136	11 798	13 345	14 445	14 281	16 377	16 576	16 790	16 648	17 635
Other income (including interest)	508	3 606	424	27	1 038	10 787	666	1 716	508	536	1 968
Total income	**10 262**	**15 742**	**12 222**	**13 372**	**15 483**	**25 069**	**17 043**	**18 292**	**17 298**	**17 185**	**19 603**

Expenditure (thousand rands)	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Personnel/payroll	5 404	8 262	8 220	8 827	9 193	9 066	11 857	9 148	10 483	11 526	12 395
Other expenditure (including interest)	2 752	5 520	4 064	4 590	4 419	6 123	4 769	4 228	4 649	4 581	12 959
Total expenditure	**8 156**	**13 782**	**12 284**	**13 417**	**13 612**	**15 189**	**16 626**	**13 376**	**15 132**	**16 107**	**25 354**

The year at a glance

Skills Development

- Commenced a Liquid Bulk Facilities Management Qualification development.
- Completed a masterclass on road traffic legislation and AARTO.
- Started a small development training for small transport business transporters.

Health, safety, security and environment

- Integrated risk-based approach to HSSE management.
- Re-alignment of HSSE committees.
- Key focus areas include health and safety, process safety, fire safety, marine spill response, contaminated land management, road safety, security, etc. Elevated security focus.
- Best practice sharing.
- Collaboration with key stakeholders.

Climate change

- Climate Change Bill signed into law in 2024.
- Phase 2 of the Carbon Tax discussion paper published by National Treasury.

Cleaner fuels

- Facilitating the introduction of sustainable / low carbon products into the fuels pool through the publication of a bioethanol blending protocols paper.

Security of supply

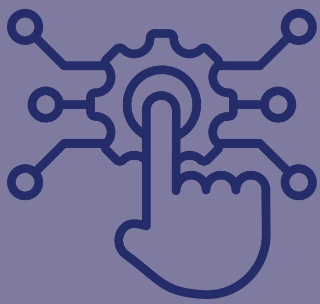
- The Competition Commission granted the industry a two-year exemption until August 2026.
- Extended leases at the Gately Site in East London for another 5 years.
- Applied for a section 79 designation to the Minister of Transport for Island View leases at the Durban Port.

Regulated price elements

- The Competition Commission granted the LPG industry an exemption in order for them to make use of an independent third party to collate cost information on cylinders. The use of a standardised cost system for each cylinder size is seen as conducive to facilitating the Cylinder Exchange Program.

Advocacy and communications

- In 2024, the Association engaged stakeholders through 251 media clips, reaching 9.5 million people across broadcast, print, online and social media. Coverage sentiment was largely neutral (189), with 39 positive and 23 negative clips.
- Key highlights:
  - H1 2024: Coverage focused on fuel adulteration, jet fuel crises, and industry challenges, with significant attention in January and April.
  - H2 2024: Emphasis shifted to the Association's rebranding efforts, stakeholder engagements and cleaner fuels initiatives. October saw a spike in coverage around SARS disputes and jet fuel shortage warnings.



Transformation

Our focus: Promote industry transformation and skills development

Areas of focus	Key developments during the year
New liquid fuels empowerment framework	No development.
Skills development programmes	• Started a Liquid Bulk Facilities Management Qualification development. • Completed a Masterclass on road traffic legislation and AARTO. • Started a small development training for small transport business transporters.

Progress in 2024

New liquid fuels empowerment framework

The draft Petroleum and Liquid Fuels Sector Codes remain unresolved, however the Association has been engaging with the DMRE and The Depart of Trade, Industry and Competition.

Skills development programmes

The Association has embarked on skills development programmes that empower people and small businesses on key aspects of the value chain. In 2024, the Association started and completed the following skills development programs:

- Started a Liquid Bulk Facilities Management Qualification development.
- Completed a masterclass on road traffic legislation and Administrative Adjudication of Road Traffic Offences (AARTO).
- Started a small development training for small transport business transporters.

Future priorities

The Fuels Industry Association of South Africa will be focusing on the following areas in 2025:

- Resolution on Draft Petroleum and Liquid Fuels Sector Codes.
- Baseline study on enterprise supply development programmes by members and impact.

Health, Safety, Security and Environment

Our focus: Promote health, safety, security and environmental leadership within the industry

Health, Safety, Security and Environment (HSSE) continues to remain one of key priorities for the oil and gas sector. These form the tenets with respect to environment, social and governance considerations. Integrated risk-based HSSE management across the value chain is essential to ensure that employees go home safely and that any potential or actual negative impacts to people, environment, assets or community are eliminated or mitigated. The South African operating environment continues to face economic, political, social and other challenges that have a direct bearing on safe and sustainable operations.

In addition, the transition to low carbon fuels, renewables, climate and other challenges are introducing new risks that need to be anticipated and managed. Human factors continue to play a critical role in enhancing safety and reducing and managing errors. The changing landscape will also require organisations to adapt, introduce new technologies and enhance skills to meet the new challenges.

The Department of Employment and Labour launched the Occupational Health and Safety Strategy 2024 - 2029 and the signing of the Occupational Health and Safety Accord 2024 as part of a strategic collaborative effort to prevent incidents and occupational diseases in the workplace.

In 2024, the BoG approved changes to the HSSE committee structures to improve efficiencies but to also incorporate current landscape changes and developments.

Focus areas	Challenges
HSSE risk management: Regulatory input	• The sector continues to see an increased regulatory burden. Additional costs associated with compliance including permits, fees, levies, fines and additional resources, amongst others. • External organisations have turned to the legal system for unimplementable legal requirements. • It is imperative for members to stay abreast of all applicable legislation and provide meaningful comment on draft bills and regulations. • The fuels industry represents business on the Advisory Council for Occupational Health and Safety which advises the Minister of Employment and Labour on the occupational health and safety strategy, and new legislation, among other things. • South Africa would be part of a global and legally binding treaty on plastics.
HSSE risk management: New and emerging risks	• An evolving landscape requires one to stay abreast of new or potential risks that face the organisation and operations. These are addressed at the respective HSSE committee structures. • Engagements at global platforms e.g. IPIECA, IMO, ISCO, among others also assist the sector with the latest research and developments in the various disciplines. • Cybersecurity risks, attacks on critical infrastructure and misinformation are some of the potential disruptors in the short and long term. • Environmental and chronic disease and health risks linked to environmental risks also dominate the risk profile looking into the future. • New technologies such as artificial intelligence, renewables, alternative fuels, will pose new risks that need to be anticipated and managed. • Members must proactively conduct climate change vulnerability assessments and implement mitigatory measures to adapt where vulnerabilities exist. • Increased focus on biodiversity risks due to its direct link to climate change.
HSSE risk management: Improving oil spill response capability	• The Marine Pollution (preparedness, response and cooperation) Bill has been going through the parliamentary processes and is yet to be promulgated. The bill once enacted will provide a compliance framework for all tiers of government, the port authorities and members. • The DFFE is working on the road map to address the gaps in the Dispersant Policy. • The next focus area will be Hazardous Noxious Substances (HNS).
HSSE risk management: Contaminated land management	• Public disclosure of the contaminated land register remains a potential reputational risk to the sector. Sites that have been remediated still remain on the list. • The DFFE has commenced with land remediation workshops at least annually. • The fuels industry continues to use the Industry Hydrocarbon Management Agreement to proactively address contaminated related matters speedily and thereby reducing/ eliminating impacts to the environment. • The Association continues to engage with DFFE on contaminated land related matters.
Improving contractor and internal stakeholder capabilities	• Human factors continue to contribute to incidents in operations even with competent contractors. • International trends indicate that multinationals are moving towards globally accepted guidelines for the sector eg. IOGP guidelines. This contributes to the simplification of contractor requirements. • Organisational changes have further contributed to the exit of experienced professionals.
Knowledge sharing and best practice guidelines	• The Association continues to provide a learning and sharing platform for members. Members can then cascade these learnings and information within their organisations and with contractors. • The Association also works with international and locally based organisations to monitor developments and participates as needed to drive the HSSE agenda for the sector in South Africa. • The HSSE best practice sharing, guidelines and other learnings are available on the Association's website for members only.
Security risk management	• Poverty, unemployment, crime and the lack of essential services have contributed to additional risks associated with unplanned protests, truck hijackings and illegal road blockades. Organised crime continues to impact logistic infrastructure and operations nationally. Fuel theft via pipelines has decreased, while challenges with rail infrastructure have increased. • Increased efforts to mitigate risks across the supply chain are required, however in some cases there is an impact on security of supply. • The Fuels Industry Association's security risk assessment for organised crime is reviewed regularly.
Road transport safety risk management	• Third party high-risk behaviour and non-compliance pose a major risk to safe operations on South African roads. • Increased civil unrest impacts on the safety of staff and assets and impedes deliveries to retail sites. • There has been an increase in third party related incidents on retail forecourts and on the roads. • Continued effort from the sector internally and with external stakeholders is key in addressing these risks.

Progress in 2024

HSSE risk management:

Regulatory input

The fuels industry has been instrumental in negotiations with key internal and external stakeholders on HSSE legislation for South Africa. These include among others: occupational health and safety, waste and water management, climate change, carbon tax, air quality, critical infrastructure, biofuels, marine pollution, transportation of dangerous goods, etc. Included in amongst these are good practice guidelines, SANS codes and other guidance.

The Association also uses external platforms and collaborates with other associations and agencies on matters of common interest. Notable pieces of legislation for this period include the Climate Change Act, norms and standards for waste and waste classification, priority areas air quality management place, extended producer responsibility related legislation, explosive regulations, asbestos abatement regulations, manual reporting of GHGs, waste tyre amongst others.

Improving marine oil spill response capability

The industry continues to work with the Department of Transport and DFFE on the development and integration of the recommendations from the Global Initiative for West and Central Africa (GI WACAF) to operationalise the requirements of the International Convention on Oil Pollution Preparedness, Response and Co-operation (OPRC). The promulgation of the Marine Pollution (preparedness, response and cooperation) Bill is awaited. The act when promulgated, will set out clear requirements for all stakeholders.

In recent years the DOT Incident Management Organisation (IMOrg) has been actively addressing a number of non-member related incidents along the South African coastline. This has helped improve the competence and operational abilities of the IMOrg, enabling the activation of incident command structures, local service providers for rescue and salvage operations, oil spill clean-up service providers, SANCOB for oiled wildlife, and local staff for shoreline clean-up, as well as the deployment of drones.

Improving contractor and internal stakeholder capabilities

Learning from local and international best practice, learning from incidents, focusing on long-term behavioural change and engaging on other high risk discussion topics is key to preventing incidents and accidents.

In 2024, best practice sharing included:

- Retail food safety
- Isolation and grounding
- Part 8 case studies sharing
- Climate change and sustainability impacts on remediation projects
- Successful remediation technologies
- Masterclass on financial provisioning
- Safety of forklift and other mechanical devices
- Process isolation
- Insurance audit, refinery shutdown, HAZOP, LOPA and other learnings
- Emergency pre-planning and response plans
- Florine free foam testing and potential challenges
- Best practice sharing – API fire water calculations
- Firefighting intervention when dealing with renewables e.g. solar
- Emerging trends in local and international fire fighting
- Buncefield implementation sharing at refinery and terminal level Review of industry guidance to members and service providers on confined space entry and working at height requirements
- Review of industry training guidance on confined space entry and working at height has been completed
- Review of the management of safety harnesses and training
- Control of breathing apparatus in confined space entry, from equipment design to confirming quality

Contaminated land management

The fuel industry members continue to work with DFFE and other authorities on historically contaminated land. Part 8 of the Waste Management Act under NEMA provides the framework for how these sites are managed. Port facilities are managed through the Transnet National Port Authorities and the DFFE. There are currently nine multi-stakeholder projects being managed by the Association.

Security risk management

The Association is a member of the Joint Initiative on Crime and Corruption (JICC), which is a working group formed by government and businesses, in order to fight the high levels of crime and corruption in the country. The JICC is made up of workstreams that are focused to reduce the crime and corruption levels in the country.

- **Criminal justice capacity building** - Strengthen the investigation, prosecution & recovery of serious corruption, financial and organised crime cases.
- **Criminal justice modernisation** - Focused on policy and legislation to support interventions and streamlining the criminal justice system.
- **Law enforcement enhancement** - Modernise and improve service delivery of the Gauteng 10111 Emergency Call Centre.
- **Critical infrastructure** - Secure critical energy, transport, logistics and other infrastructure.

The Association's involvement in these structures assists with better advocacy and makes it easier to get the agenda of the industry on organised crime response initiatives supported by law enforcement agencies.

The fight against illicit trade, extortion remains high risk, and the committee will refresh the risk assessment on organised crime in 2025 to ensure that the response plan is relevant to the identified risks.

Road transport safety risk management

The Association held a masterclass on road transport legislation and the newly enacted Administrative Adjudication of Road Traffic Offences Act (AARTO) for small business transporters and member companies.

Future priorities

The Association continues to review its priorities, and for now, the fuels industry's primary HSSE focus areas remain unchanged, as they are broad and all-encompassing across the supply chain. Risk-based decisions are made at the committee level, and are endorsed by the strategic HSSE committee and the Board of Governors to address various existing and potential risks within these focus areas. This takes into account changes in the local landscape as well as international developments.

The HSSE focus areas are:

- Reducing HSSE risks in industry operations, which impact people, the environment, assets and reputation.
- Reducing road transport risks and engaging stakeholders on third party risk management.
- Developing security related industry best practice to proactively assess threats and reduce security risks.
- Making recommendations for improvement in the national oil spill response capability.
- Increasing contractor capability through collaborative industry efforts.

Energy Transition

Our focus: With increased focus on the anthropogenic induced climate change, significant efforts are being made by energy companies to mitigate these effects by primarily focusing on the short to long term reduction in carbon footprint.

Focus areas	Key developments during the year
Climate Change Act signed into law by the President	• Deliberation on the Bill in Parliament and National Council of Provinces was concluded and the Bill passed. It was signed into law by the President in July 2024 but is not yet operational.
Phase 2 of Carbon Tax proposal paper published by NT	• Proposal on the development of the carbon tax and the treatment of allowances.
Update to Petroleum Product Standards	• Major progress in the updating of petroleum products and standards following the gazetting of Clean Fuels II specifications.
Facilitating the introduction of sustainable/low carbon products into the fuels pool	• Publication of a paper regarding ethanol blending protocols and handling at depots. • Presentation of a paper to the Department of Mineral Resources and Energy on cost recovery for ethanol blending at depots.

Progress in 2024

The Fuels Industry Association formed the Advisory Committee on Climate Change (ACCC) in 2014 in order to provide a forum which can identify, co-ordinate and oversee industry issues relating to climate change policy and regulatory developments in both the local and international arena regarding the interests of the conventional crude oil refining industry.

Similarly, the Fuels Industry Association recognised the need to transform the Clean Fuels II task team into the Refining Sustainability Forum (RSF) in 2018 to co-ordinate efforts to manage short to medium term impacts and inform opinion makers in order to influence government policy towards ensuring the sustainability of the industry. This, while adapting to anticipated longer term structural changes.

Since that time and following the pandemic there has been worldwide concentrated efforts aimed at the mitigation of climate change induced by anthropogenic greenhouse gas emissions. This has resulted in a broader initiative focused on the energy transition – a move to provide sustainable energy from a wide variety of clean platforms to satisfy modern energy requirements for mobility and industry. This transition has been endorsed by almost all international oil majors who in turn are rebranding themselves as International Energy Companies (IECs) in recognition of the requirement to provide sustainable clean energy offerings.

Likewise, there was also the recognition that the two aforementioned committees would also need to transform recognising the cross cutting and mutual issues that both committees face. For the ACCC, the local regulatory framework concerning climate change coalesced into a carbon tax regime and the development of Climate Change legislation under the Department of Forestry Fisheries and the Environment, meaning that a large portion of the ACCC's intended functions had been accomplished. Similarly for the Refining Sustainability forum, the changing nature of the industry has resulted in the permanent shutdown of one facility and the temporary shutdown of another. Furthermore, some IECs have it as part of their corporate strategy to migrate away from fossil fuels towards other sustainable liquid fuels with the vision of attaining net zero carbon emissions by 2050.

For these reasons, the Board of Governors mandated the merging of these two committees into the Energy Transition Committee, which would continue with the activities that used to be conducted by the two individual committees.

Climate Change Act

The Climate Change Bill was originally published for comment during May 2018 and then after passing through NEDLAC, but being delayed because of the COVID-19 pandemic, it finally entered Parliament in February 2022. During the latter portion of 2022 numerous public engagements took place which extended into 2023. During these public engagements, significant push back occurred from communities who thought that the implementation of the Bill would result in job losses and not facilitate employment growth.

The portfolio committee finalised and adopted the Bill in 2023 which then passed to the National Assembly and the National Council of Provinces (NCOP) for further deliberations. The National Assembly adopted the Bill during October 2023 year and NCOP in April 2024. The Bill was finally signed into law in July 2024 but is yet to be operational.

The Act sets out a national climate change response, including mitigation and adaptation actions, which also constitutes South Africa's fair contribution to the global climate change response, under the Paris Agreement. It formalises the Presidential Climate Commission (PCC) making it a statutory body and is meant to provide key advisory support to the government on climate mitigation and adaptation. The law also mandates national, provincial, and municipal governments to integrate climate change considerations into their planning and operations making these entities having a range of obligations to meet in terms of climate change.

Other key features of the Act include:

National Adaption Strategy and Plan

Within two years of the commencement of the Act, the Minister, in consultation with other relevant sector Ministers must develop and publish a national adaptation strategy and plan, with the objective of strengthening economic, environmental and societal spheres of South Africa against the effects of climate change, while simultaneously reducing vulnerabilities and risks to climate change.

Sector Adaption Strategy and Plan

Within one year of the publication of the National Adaption Strategy and Plan, the relevant sector Ministers must undertake assessments that identify the most at-risk communities and ecosystems. They must then develop and implement a Sector Adaption Strategy and Plan with measures and mechanisms to address these risks.

Greenhouse gas emissions trajectory

The DFFE Minister must, in consultation with the cabinet, develop and determine a national greenhouse gas emissions trajectory for the country with a national reduction objective, which must be reviewed every five years and be informed by the most relevant and up-to-date information.

Sector and sub-sector targets

The Minister must also list greenhouse gas emitting sectors and sub-sectors that will be subject to targets aligned with the national greenhouse trajectory and must consider the best available science and socio-economic impacts of introducing these targets.

Greenhouse gas activities

The Minister must publish a list of greenhouse gas activities that are believed to cause climate change. This list must include existing greenhouse gas emitting activities as well as new activities and must include thresholds for each.

Carbon budgets

These GHG activities will be used to identify entities who will then be assigned a carbon budget that must align with the national greenhouse trajectory. The budgets are allocated over three consecutive five-year periods and affected entities must report on annual monitoring and progress against mitigation efforts.

Synthetic greenhouse gas emissions

There are also provisions about the declaration of gases that are classified as synthetic. Plans and thresholds will be applied against these to ensure ultimate phase out.

Carbon Tax Act

During the February 2022 budget speech, the Minister of Finance indicated the objective to increase the headline rate of carbon tax to $/t 30 by 2030. At the same time, the various allowances under the Act would be phased down and potentially out. Following some push back from industry, the dollarisation of the headline rate was converted to Rands with the caveat that this would be reviewed annually to ensure alignment with the $/t 30 2030 objective.

Towards the end of the year, National Treasury published for comment a Phase 2 implementation of the Carbon Tax which provides for proposed future trajectory of the allowances which include the following:

- A reduction of basic tax-free allowance to 50% in 2026 and then a reduction by 2.5 percentage points per year from 2027 until 2030. Thereafter a reduction by at least 2.5 percentage points per year from 2031, where South Africa's NDC commitments under the Paris Agreement could be considered.
- An increase in the performance allowance to 10% (current 5%) from 2026 but which will also be accompanied by a review of the benchmarks employed.
- An increase in the carbon offsets allowance to 20%.
- A phase out of the carbon budget allowance given that the Climate Change Act now mandates the adherence to a budget but without penalties in terms of the Act. However, penalties would be levied against those who exceed the carbon budget in terms of the Carbon Tax Act. The 2022 Budget proposed a penalty of R640 per tonne of carbon dioxide equivalent.
- An increase in the trade exposure allowance from 30% to 50% for trade exposed sectors. This allowance would only apply for those sectors deemed exposed above 50%. The paper is confusing as to its application, and it is presently uncertain whether the trade exposure allowance will apply in accordance with the current Carbon Tax Act or only to specific, hard to abate sectors.

The carbon tax cost recovery quantum for the liquid fuels refinery sector was increased from 0.63c/l to 0.66c/l (4.8% increase), effective from 1 January 2023. The percentage increase was below that of the headline rate which increased from R/t 144 to R/t 159, an increase of 6.7%. Since the implementation of the carbon tax recovery mechanism for refiners in 2021, this quantum has increased by 17.9% (2021 to 2023) as opposed to the headline rate which has increased by 18.7% over the same period.

Update to petroleum product standards and specifications

Following the gazetting of the updated petroleum product standards and specification regulation in 2021 and its amendment in 2022, significant progress was made during the year relating to the update of associated petrol, diesel, fuel ethanol and biodiesel (fatty acid methyl ester) standards.

Clean Fuels II introduction

During the course of the year, a high-level implementation plan towards the introduction of cleaner fuels was sent to the Department of Mineral Resources and Energy for their consideration. Initial indications are that the changeover to cleaner fuels, that is, both production and imports, needs to commence approximately three months before 1 July 2027, the date when cleaner fuels is required to be dispensed from the pump.

Legislation Development

The Department of Mineral and Petroleum Resources published the Petroleum Products Bill towards the end of the year. This Bill is meant to update and replace the Petroleum Products Act of 1977 which has been amended a number of times.

The Bill's primary focus is on increased compliance in the industry with the legislation of a number of actions required in order to ensure these which include the essential establishment of a compliance bureaucracy. While increased compliance is welcomed, it is questionable that legislating into existence a bureaucracy in an environment of cost control will be achievable. Furthermore, a number of different licences and registrations have been proposed which are not seen as necessary if compliance was adhered to. The Bill also provides for extraordinary powers to be given to the Minister, significantly over and above those of the Petroleum Products Act of 1977, as amended. Other powers are given to controllers and inspectors and some of these may be unconstitutional.

Alternative fuels

There is continued focus on the International Energy Companies to reduce their carbon footprint in the regions in which they operate. In this respect there is an increased focus on biofuels, both bio-ethanol and biodiesel in line with this objective. Accordingly, there a number of initiatives underway at the Fuels Industry Association to facilitate these objectives which include:

- Tackling the issue of fuel ethanol blending at depot level in line with the Customs and Excise Act – the provisions of the present Act require blending depots to register as manufacturing warehouses. Accordingly, a proposal to handle the taxation of fuel bioethanol at the ethanol manufacturing plant (rather than the depot) was provided to National Treasury, however no response has been received from them regarding these proposals.
- A paper was published at the beginning of 2024 providing for protocols relating to the blending of ethanol at depots which included the following:
  - Providing guidance to designers and operators of fuel distribution depots/terminals on recommended practices for the receipt, storage and blending of fuel ethanol and distribution of the resultant ethanol containing petrol.
  - Assisting interested parties to understand the properties of fuel ethanol and ethanol containing petrol and how to manage the introduction of ethanol blending at fuel distribution terminals and provide quality assurance of ethanol containing petrol.
  - Address the associated safety, health and environmental aspects as required by relevant regulations.
- A paper was developed during the course of the year and submitted to the Department of Mineral Resources and Energy (DMRE) concerning the recovery of costs for ethanol blending. Further, positive engagements took place with the DMRE on this paper later in the year.
- The potential for Sustainable Aviation Fuel production and adoption into the jet fuel pool is gaining increasing attention. To this end ICAO and the Department of Transport has set up a small team to assess the viability of local production.

Future priorities

The Fuels Industry Association will be focusing on the following areas during 2025:

- Continued engagement with the DFFE on regulations pursuant to the Climate Change Act – these regulations are expected in the first half of the calendar year.
- Continued engagement with interested parties on the 'Just Transition'.
- Continued engagement towards obtaining financial compensation for cleaner fuels production.
- Continued engagement with National Treasury/South African Revenue Service on the better treatment of fuel ethanol to facilitate blending into the fuels pool.
- Develop an industry response to other Department of Mineral and Petroleum Resources (DMPR) affecting the liquid fuels pool.
- Further engagement with the DMPR on developing legislation and regulation.

Security of Supply

Our focus: Facilitate the security of supply of petroleum products

Focus areas	Key developments during the year
Identifying emerging risks to security of supply of petroleum products	The South African Revenue Service approved the temporary licensing of the identified tanks as SOS warehouses for the storage and distribution of imported aviation and/or illuminating kerosene. The products are to be imported and stored separately as already articulated, for a period of 12 months, until 20 October 2025.
Competition Commission exemption	The Competition Commission granted the petroleum industry a conditional exemption for a period of twenty-three months from 1 August 2024 up to and including 30 June 2026, which is the expiry date in line with the designation status granted by the Minister of Trade, Industry and Competition granted to the South African petroleum industry.
Transnet National Ports Authority (TNPA) leases	• TNPA extended members' leases at the Gately Site in East London for another five years until the process of Section 56. • Applied for a section 79 designation to the Minister of Transport for Island View leases at the Durban Port.

Progress in 2024

Jet supply to OR Tambo Airport

Jet fuel to O.R Tambo International Airport (ORTIA) is supplied from two sources, via the dedicated pipeline (Avture Line) from Natref refinery to the airport supplying 22 000m^2 per week and via rail from Durban supplying 18 000m^2 a week. The multi-product pipeline can transport jet fuel from Durban to ORTIA however, there is not enough tankage in Durban to facilitate injections.

Since 2023, SARS has approved the temporary licensing of the identified tanks as SOS warehouses for the storage and distribution of imported aviation and/or illuminating kerosene. The products are to be imported and stored separately, for a period of 12 months, until 20 October 2025. The granted period is to allow all parties to attend to the complexities that are involved in the licensing process.

The risk to supplying jet fuel to O.R Tambo remains, until the permanent solution between SARS and the injecting parties is found.

Transnet National Ports Authority (TNPA) leasing strategy

Since the publication of the TNPA Island View strategy in 2018, the Association has been engaging TNPA to raise issues that affect the industry if the strategy is finalised in its current form.

Key highlights

- TNPA extended the Port of East London leases for a period of five years and the commercial aspects are being discussed with members on a bilateral basis.
- The Association submitted a section 79 application to the Minister of Transport on behalf of the members in May 2024. A decision is expected during 2025.

Competition Commission exemption

The Commission granted a conditional exemption to the petroleum industry in respect of the aforementioned 2020 Exemption Application for a period of twenty-three months, from 1 August 2024 up to and including 30 June 2026. The exemption is granted for:

- Heads of supply and logistics planning teams
- Security of supply committee
- Day-to-day practices
- Joint engagements convened by DMRE on cleaner fuels, biofuels and strategic stocks

Tank farm relocation from Port of PE to Port of Ngqura

The Ports Regulator of South Africa issued its Record of Decision (ROD) in respect of an appeal in 2022 from members, where it set aside the TNPA's decision to terminate the leases of members. TNPA has until 2027 to construct a new Liquid Bulk Terminal at the Port of Ngqura (PoN) before shutting down the Dom Pedro facility at the Port of Port Elizabeth, Gqeberha PoPE.

Key milestones on the project include:

- Issuance of Environmental Authorisation (EA).
- RFP document for Section 56 Private Sector Partnership.
- Finalisation of the (PSP) for the new Liquid Bulk Terminal.
- RFP document to be approved by Transnet governance structures during October 2024.
- RFP to be advertised only after approval by TNPA EXCO expected by end of October 2024.

Future priorities

The Fuels Industry Association of South Africa will be focusing on the following areas in 2025:

- Develop supply chain risk assessment and an action plan from risks identified.
- Engage the Transnet National Ports Authority to ensure smooth relocation of the oil industry to the PoN and the status of PoPE.
- Engage the Transnet National Ports Authority to ensure that East London and Durban leases are finalised.
- Work with industry to ensure adequate jet infrastructure in Durban.

Regulated Price Elements

Our focus: Contribute to policy formulation, implementation and a fair regulatory framework for all

Progress in 2024

Petroleum products price developments
Most liquid fuels prices are regulated by the DMRE according to predetermined formulas and rules, which provide for certain margins across the value chain.

Various duties and levies are implemented by the National Treasury. Liquid fuels not price regulated by the DMRE include aviation gasoline, jet fuel, marine bunker fuels and heavy fuel oils.

The prices of petrol and diesel comprise of the basic fuel price (BFP), government taxes and levies (including the fuel levy and the Road Accident Fund levy), various other levies for NERSA or tracer (where applicable), magisterial district zone pricing (MDZ) and in the case of petrol only, allowable tariffs for secondary distribution, storage, wholesale and retail, as determined through the Regulatory Accounting System (RAS).

The illuminating paraffin price comprises the BFP for paraffin and various tariffs for distribution, storage and wholesaling. There are no government duties or levies on paraffin (unlike diesel) and VAT is not levied on the sale of paraffin.

LPG pricing is based on a specific landed cost for LPG at Richards Bay, which is the deemed refinery gate price for LPG plus allowable tariffs for distribution, filling plants, operating costs, depreciation, working capital, and a retail margin. VAT is charged on the sale of LPG to consumers and incorporates all these costs.

Regulatory accounting system (RAS)
The Regulatory Accounting System was fully implemented in 2013 (with a transition period in 2011 from the old MPAR system). The RAS system provides a consistent methodology to determine industry tariffs and guidelines for this, which have been provided by the Department of Mineral Resources and Energy (DMRE).

In 2016, the Department undertook to finalise the RAS manual, which serves as the working rules for the computation of the RAS margins calculations. This manual has been approved but is yet to be published as an official document although the guidelines are used in practice.

The RAS tariff adjustments are typically made during the December price cycle based on the previous years submitted information to the DMRE. Price changes for 2024 became effective on Wednesday 4 December 2024, based on 2023 information supplied to the DMRE. The DMRE has communicated that the Minister has announced the establishment of the Ministerial Task Team that will undertake the fuel pricing system review. No fuel price review will be done outside the Task Team, and the framework of what they will review. This includes the RAS review.

Increase in secondary storage element
The Secondary Storage (SS) portion was increased from 36.6 c/l to 38 c/l for petrol. Diesel is not price regulated at the pump, so there is no regulated price for this part of the value chain.

Increase in secondary distribution element
The Secondary Distribution (SD) portion was increased from 17.2 c/l to 18.8 c/l for petrol. Diesel is not price regulated at the pump so there would be no regulated margin for this part of the value chain.

Increase in wholesale margin
The wholesale margin increased from 69.8 c/l to 73.7c/l.

Increase in retail margin on petrol
The retail tariff on petrol increased by 8.5c/l to 299.5 c/l.

Government taxes and levies
The Minister of Finance, in his Budget Speech on 21 February 2024, announced that the fuel levy and the Road Accident Fund levy on both petrol and diesel will remain at 394.00 c/l and 218 c/l respectively, with effect from the 3 April 2024. This is to cushion motorists from high fuel prices. The Carbon Fuel levy increased by 1.0 c/l on petrol and 3.0 c/l on diesel.

Magisterial district pricing zones (MDZ)
The Magisterial District Zones (MDZ) price, also referred to as primary transport costs, are based on the cost of moving fuels from a supply point to the inland distribution centres by pipeline and road. The tariffs are adjusted annually subject to approval by the Minister of Mineral Resources and Energy.

The MDZ system is based on standard costs for road transport as supplied by the Road Freight Association (RFA) and actual pipeline rates as set by the National Energy Regulator (NERSA) for Transnet Pipelines.

The MDZ tariffs increased on average by approximately 7.6%.

LPG pricing - maximum refinery gate price (MRGP)
The DMRE changed the pricing formula in June 2020 so that LPG would be more reflective of LPG import dynamics, considering most LPG consumed in the country is now imported. That is, the base price was changed to Saudi CP, plus import costs to Richards

Bay on LPG tankers, with allowances for wharfage, demurrage, loss, insurances and tankage.

The Competition Commission granted the LPG industry an exemption in order for them to make use of an independent third party to collate cost information on cylinders. The use of a standardised cost system for each cylinder size is seen as conducive to facilitating the Cylinder Exchange Program

National Ports Authority tariffs

The tariff for liquid fuels remained unchanged for the year at 3.244 c/l.

Legislation

Levy on the petroleum pipeline industry for 2024/25

In terms of Government Notice No. 1334 of 10 December 2020, the Minister of Mineral Resources and Energy in concurrence with the Minister of Finance approved a levy of 0.41323 c/l applicable from 1 April 2024 to 31 March 2025. The levy was determined based on the estimated volumes of 16.3 billion litres per annum and the 2024/25 annual performance plan and budget requirements for the regulation of the pipeline industry of R67 344 007 million. This levy has remained unchanged for four years.

Future priorities

The Fuels Industry Association of South Africa will be focusing on the following areas in 2024:

- Petroleum Products Bill
- RAS review
- BFP - coastal storage

Advocacy and communications

Our focus: Support the Chief Executive by providing a forum that identifies, coordinates, and implements communication strategies to protect, defend, and enhance the reputation of the fuels industry in South Africa.

Focus areas	Key developments during the year
Raise the profile of the industry that the Fuels Industry Association represents, via the media	• Handover of public relations from external party to internal communications department. • Finalise, launch, and maintenance of the new Association website.
Create credibility for industry and the Fuels Industry Association spokespeople in the eyes of stakeholders, via the media	• New look and feel of Fuels Industry Association branding. • Develop a framework and strategy for media including digital media and reporting.
Promote the Fuels Industry Association as an effective and trusted advocate among key stakeholders (government, members)	• Launch a successful 30th anniversary conference. • Host government officials in Interstate Oil Committee.
Build relevance for the Fuels Industry Association (and the work of the industry) amongst its members	• New look and feel of monthly newsletters, as well as handover of newsletter from external party.

One of the most effective ways in which we communicate with a large number of stakeholders about our core priorities is through our media relations. During the year, we engaged with stakeholders through media coverage from January to December 2024, analysing key issues, primary voices and sentiment distribution across the year.

The insights emphasise major coverage trends, events and themes to showcase the Fuels Industry Association's role in shaping South Africa's fuel industry narrative.

A total of 251 media clips mentioning the Fuels Industry Association of South Africa were analysed across broadcast, print, online and social media.

Sentiment distribution:

- Neutral: 189
- Positive: 39
- Negative: 23
- Total audience reached: 9,516,366

Key industry developments and challenges: January – June 2024

The first half of the year saw key issues emerging around fuel adulteration, jet fuel crises and industry developments. January and April were marked by significant coverage on fuel quality concerns, including adulterated fuel incidents and jet fuel supply shortages.

The Fuels Industry Association's advocacy for the industry gained traction in July, with notable mentions of the Association's 30th anniversary and calls for capital investment in local refineries.

Fuel quality, stakeholder engagements and strategic shifts: July – December 2024

The second half of the year featured heightened discussions on adulterated fuel, jet fuel supply shortages and Fuels Industry Association's rebranding initiatives. September focused on stakeholder engagements, while October saw a spike in coverage due to SARS disputes, jet fuel warnings and fuel quality concerns. November and December concluded the year with coverage on cleaner fuels initiatives, LPG cylinder changes and ongoing jet fuel challenges.

The table below shows the number of communication activities and media coverage received in 2024.

Figure 1: The Association's communication activities and media coverage

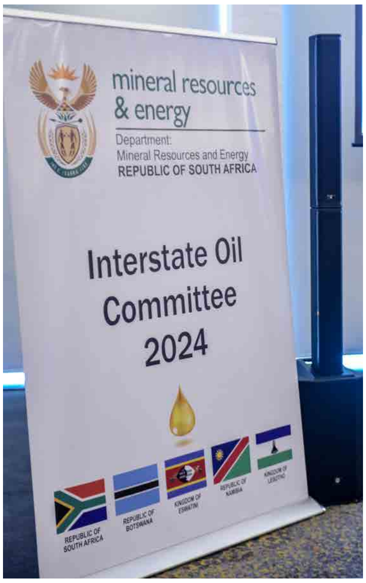
Radio coverage	TV coverage	Print coverage	Online coverage	Social media coverage
29	10	44	120	48

Event Gallery

Fuels Industry Association Media Round Table




Interstate Oil Committee






Fuels Industry Association 30th Anniversary Conference


SCAN HERE TO VIEW CONFERENCE HIGHLIGHTS



Members Networking Sessions

Statistics

Regulatory Accounting System margins (petrol grades)

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Wholesale margin at year end (c/l)	35.60	34.00	34.80	35.70	40.50	45.50	56.60	69.80	73.30
Retail margins	176.40	187.20	198.00	206.00	221.60	228.80	241.90	285.70	299.50
Secondary distribution margin at year end (c/l)	17.30	15.90	14.60	15.20	15.80	17.94	16.90	17.20	18.80
Secondary storage margin at year end (c/l)	17.90	18.60	20.90	23.00	27.20	30.70	28.80	36.60	38.00

Change over prior year (%)	2016	2017	2018	2019	2020	2021	2022	2023	2024
Wholesale margin at year end	7.2%	-4.5%	2.4%	2.6%	13.4%	12.3%	24.4%	23.3%	5.0%
Retail margins	9.1%	6.1%	5.8%	4.0%	7.6%	3.2%	5.7%	18.1%	4.8%
Secondary distribution margin at year end	26.2%	-8.1%	-8.2%	4.1%	3.9%	13.5%	-5.8%	1.8%	9.3%
Secondary storage margin at year end	-3.3%	3.9%	12.4%	10.0%	18.3%	12.9%	-6.2%	27.1%	3.8%

Notes:

* 2011 & 2012 were transition periods for the Regulatory Accounting System.

** Regulatory Accounting System was fully implemented on 4 December 2013.

Sources of crude oil for Fuels Industry Association members: 2014 to 2024

Country of origin	2014*	2015*	2016*	2017*	2018*	2019*	2020	2021	2022	2023	2024
Angola	2614	3348	4 000	3 420	2 352	1 153	–	662	668	514	1 264
Cameroon	–	–	–	–	–	–	–	–	–	1 405	–
Congo	–	–	–	–	–	–	–	–	116	–	–
Côte d'Ivoire	–	–	–	–	90	–	83	–	59	–	1353
Equatorial Guinea	378	22	129	144	–	37	–	–	–	–	–
Ghana	756	–	–	125	1149	1 276	1 400	948	120	2 758	5 025
Greece	–	–	–	–	–	–	–	–	–	–	1 262
Guinea	–	138	–	38	–	–	–	–	–	–	–
India	–	–	–	38	–	–	–	48	–	–	–
Netherlands	–	–	–	–	–	–	–	–	–	124	–
Nigeria	6 658	7 291	6 131	4 083	6 745	7 174	5 065	3 181	2 917	3 383	3 916
North Sea / U.K.	–	–	183	–	–	–	–	–	–	–	–
Norway	–	–	270	–	37	145	37	–	–	–	–
Oman	–	133	–	–	–	–	–	–	–	–	–
Panama	145	–	–	–	–	–	–	–	–	–	–
Qatar	202	832	682	–	133	–	–	–	–	–	–
Russian Federation	–	–	–	–	–	–	140	–	–	–	–
Saudi Arabia	8 120	4 895	7 939	8 170	8 780	6 122	5 490	4 441	2 238	1 720	1 490
South Africa	–	–	–	–	–	–	–	42	38	38	–
Spain	–	–	–	–	–	–	129	–	–	–	–
Togo	–	–	–	297	157	137	–	–	–	–	–
United Arab Emirates	924	1 337	673	107	794	2 011	133	130	–	–	–
United Kingdom	273	–	–	–	–	–	–	–	–	–	–
United States	–	–	–	139	–	151	171	103	–	571	8 893
Unknown	–	–	–	–	–	–	301	–	–	–	–
Zambia	–	–	–	–	–	–	–	4	2	–	–
Total	**21 279**	**19 233**	**20 666**	**16 770**	**20 238**	**18 207**	**12 949**	**9 558**	**6 157**	**10 514**	**23 203**

*South African Revenue Service

All figures are in kilo tons.

2020 crude import figures do not include those into Saldanha from April onwards - these assumed to enter into SFF storage and not for processing.

2021 crude import figures do not include those into Saldanha for the entire year. Crude imports into Saldanha amounted to 2046 k tons.

2022 crude imports include that from SA strategic stock (crude origin unknown) and Zambia (crude origin unknown) following closure of Ndeni refinery.

2023 crude imports include that from SA strategic stock (crude origin unknown).

Crude oil price movements: January 2022 to December 2024

Average monthly prices (US$/bbl)

	2022			2023			2024		
	Brent	Dubai	Forcados	Brent	Dubai	Forcados	Brent	Dubai	Forcados
January	87.2	83.5	86.5	82.8	80.4	84.8	80.3	78.8	81.1
February	98.2	92.3	95.0	82.5	82.1	84.0	83.9	80.9	84.9
March	118.8	110.9	114.6	78.6	78.5	79.2	85.5	84.2	89.0
April	104.4	102.8	105.9	84.9	83.4	83.4	90.2	89.2	91.5
May	113.3	108.1	115.7	75.6	74.9	74.8	82.0	84.0	83.6
June	123.7	113.2	123.5	74.7	75.0	74.7	82.6	82.5	83.1
July	112.7	103.1	112.2	80.1	80.4	81.5	85.3	83.8	86.9
August	100.0	96.6	102.2	86.2	86.5	86.8	80.9	77.6	81.3
September	89.9	90.9	92.5	94.0	93.3	96.0	74.3	73.5	74.7
October	93.3	91.1	94.7	91.0	89.8	93.4	75.7	74.9	76.2
November	91.7	86.2	91.7	83.2	83.6	83.7	74.5	72.6	74.3
December	81.1	77.2	80.8	77.9	77.3	80.5	73.9	73.2	74.3
12-month average	**101.2**	**96.3**	**101.3**	**82.6**	**82.1**	**83.6**	**80.8**	**79.6**	**81.8**

Brent crude prices

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Average US$ price	99.0	52.0	43.7	54.3	70.9	64.3	41.7	70.7	101.2	82.6	82.1
*Average rand price/barrel	6.75	4.16	4.05	4.55	5.90	5.84	4.32	6.57	10.41	9.57	9.43
Average exchange rate	10.85	12.73	14.71	13.32	13.24	14.46	16.45	14.78	16.36	18.41	18.26

* Based on exchange rate as per CEF BFP rates

Consumption of petroleum products in South Africa

	Millions of litres					
Year	**Petrol**	**Diesel**	**Paraffin**	**Jet fuel**	**Fuel oil**	**LPG**
2014	11 344	13 169	558	2 197	487	398
2015	12 072	14 178	573	2 441	591	588
2016	10 160	10 846	558	2 121	562	557
2017	11 174	12 147	648	2 713	523	551
2018	11 142	12 539	702	2 346	552	504
2019	10 773	12 909	620	2 439	410	495
2020	8 761	11 690	702	1 091	486	448
2021	9 302	12 946	1 078	1 048	491	308
2022	9 185	12 717	1 178	1 478	594	323
2023	9 037	12 907	1 298	1 844	658	288
2024	8 763	11 807	1 195	1 754	503	279

* Source: Department of Energy

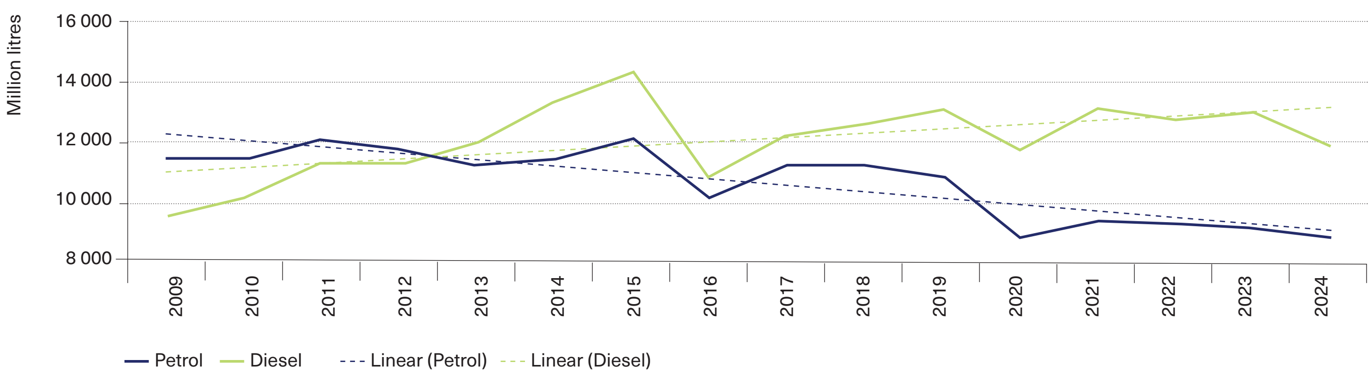


***Figure 6** Petrol and diesel consumption*

Brent crude prices *continued*

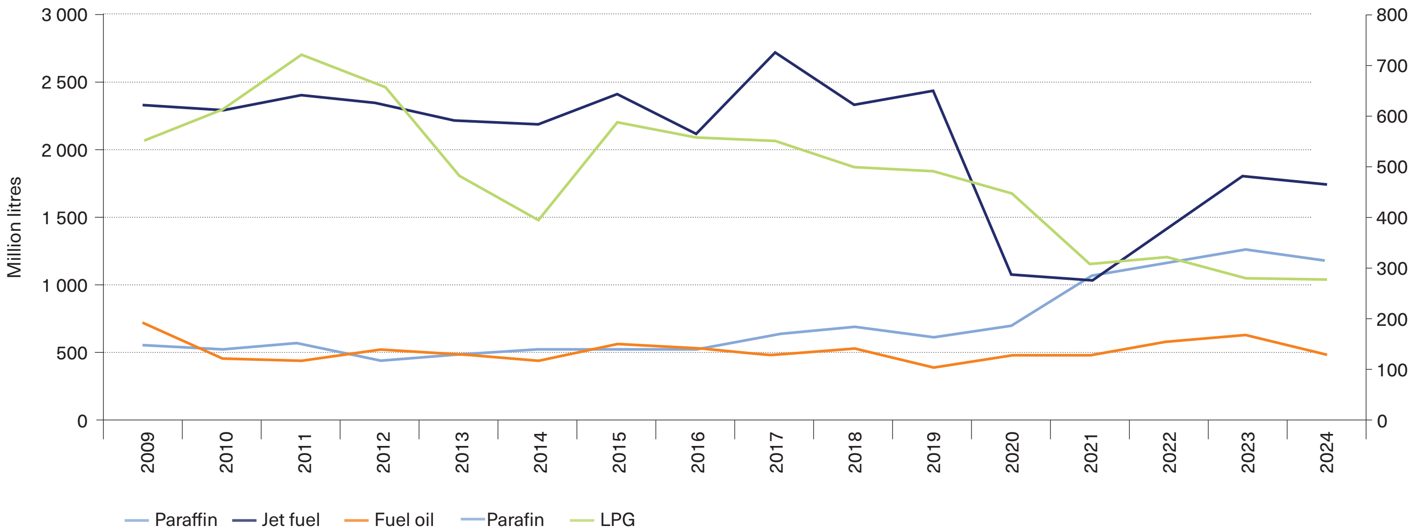


Figure 7 *Petroleum products consumption*

Petroleum products imports and exports

Million litres**								
	Imports				Exports			
Year	Petrol	Diesel	Kerosene	LPG	Petrol	Diesel	Kerosene	LPG
2014	1 150	4 997	288	47	989	1 493	155	60
2015	1 870	6 451	275	99	1086	1 625	887	69
2016	1 396	4 424	108	183	1159	1 887	381	71
2017	2 114	6 036	421	182	1082	1 784	395	104
2018	2 195	6 105	395	187	1321	1 838	441	130
2019	1 477	5 858	462	160	1179	1 786	331	110
2020	1 720	6 815	680	268	1155	914	671	108
2021	4 009	9 567	1 001	442	1054	895	147	109
2022	5 455	11 914	964	368	793	698	14	104
2023	4 483	12 794	963	871	1018	935	481	252
2024	4 000	14 793	1 053	2 771	939	821	479	232

*Source: South African Revenue Service / DMRE

**Figures for LPG are in kilo tonnes.

Kerosene includes illuminating paraffin, jet fuel and dual purpose kerosene.

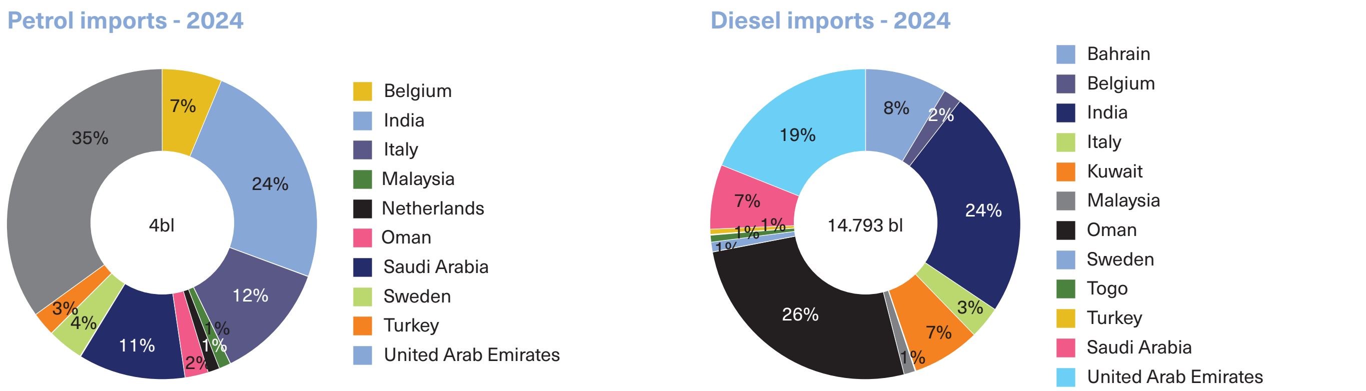


Figure 8 *Petrol and diesel imports 2024*

*Source: South African Revenue Service

Capacity of South African refineries

Capacity (bbl/day)

Refineries	2015	2015	2016	2017	2018	2019	2020	2021	2022	2024
Sapref	180 000	180 000	180 000	180 000	180 000	180 000	180 000	–	–	–
Enref	120 000	135 000	135 000	135 000	135 000	135 000	–	–	–	–
Astron Energy	100 000	100 000	100 000	100 000	100 000	100 000	100 000	100 000	100 000	100 000
Natref	108 000	108 000	108 000	108 000	108 000	108 000	108 000	108 000	108 000	108 000
Sasol*	150 000	150 000	150 000	150 000	150 000	150 000	150 000	150 000	150 000	150 000
PetroSA*	45 000	45 000	45 000	45 000	45 000	45 000	–	–	–	–
Total	703 000	718 000	718 000	718 000	718 000	718 000	538 000	358 000	358 000	358 000

*Crude equivalent

2021 - 2021: Engen announced the closure of their refinery in Durban. PetroSA facility at Mossel Bay shut down due to lack of feedstock.

2022: Sapref announced a pause in operations as from March 2022. Refinery subsequently severely damaged by flooding.

Prices in Gauteng: 30 June each year

Year	95 octane leaded petrol retail price (c/l)	0.005% sulphur diesel wholesale price (c/l)	Illuminating paraffin single maximum national retail price (c/l)*	Liquefied petroleum gas maximum retail price (c/kg)**
2014	1 402	1 280	1 271	2 501
2014	1 336	1 173	1 006	2 217
2015	1 326	1 111	718	2 185
2016	1 354	1 162	714	2 144
2017	1 579	1 425	927	2 522
2018	1 657	1 528	974	2 657
2019	1 340	1 139	490	2 129
2020	1 713	1 471	1 102	2 721
2021	2 417	2 323	1 820	3 714
2022	2 263	1 969	1 392	3 111
2024	2 425	2 115	1 266	3 631

* The single maximum national retail price (SMRP) for IP was introduced in 2003.

**Maximum retail price (MRP) of LPG was introduced in July 2010.

Source: Department of Mineral Resources and Energy June price schedule.

Petroleum product prices

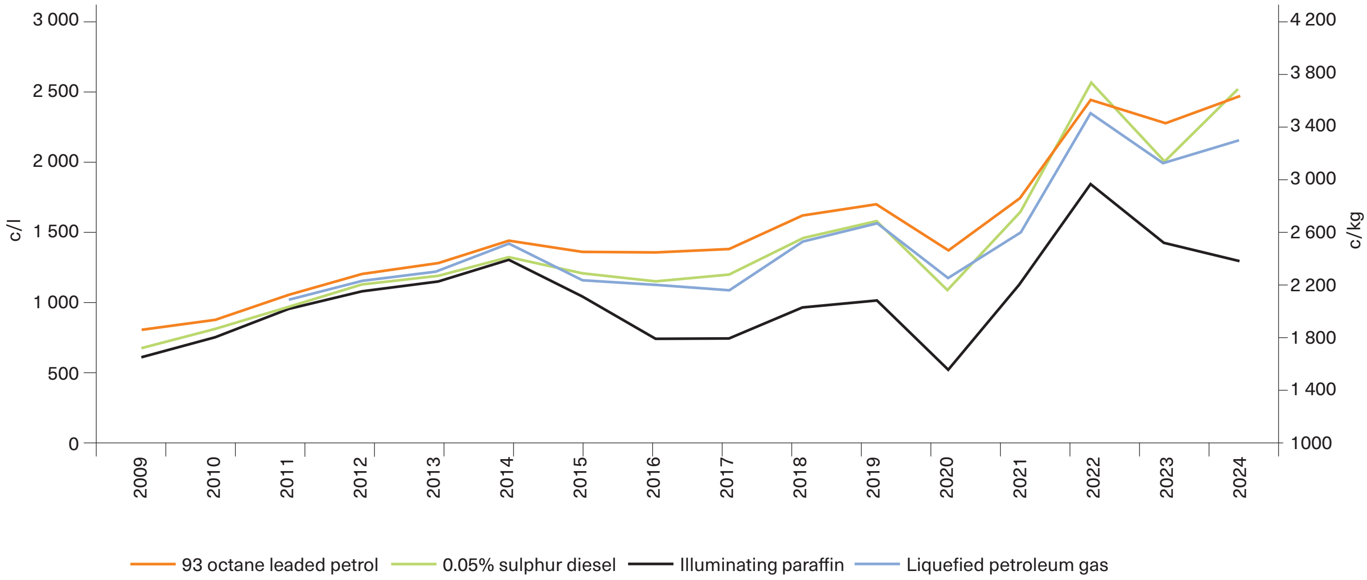
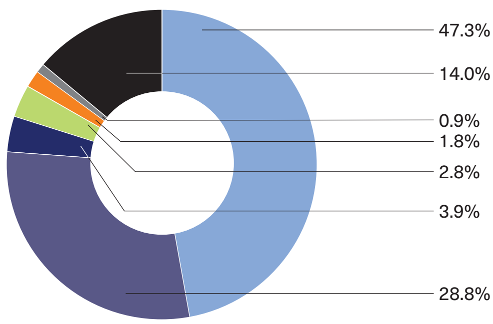


Figure 9 *Prices in Gauteng: 30 June each year*

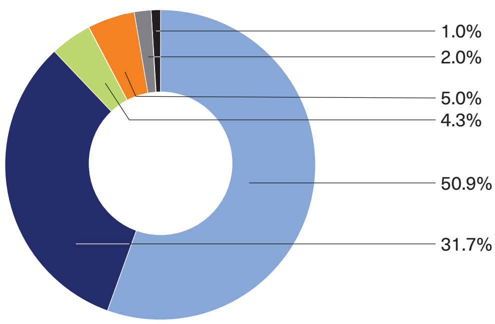
Petrol, diesel & LPG price breakdown



Contribution to the basic price	1015.670 c/l
Government duties and levies	618.330 c/l
Zone differential	82.800 c/l
Wholesale margin	73.300 c/l
Secondary storage	38.000 c/l
Secondary distribution	18.800 c/l
Retail margin*	299.500 c/l
Pump rounding	0.200 c/l

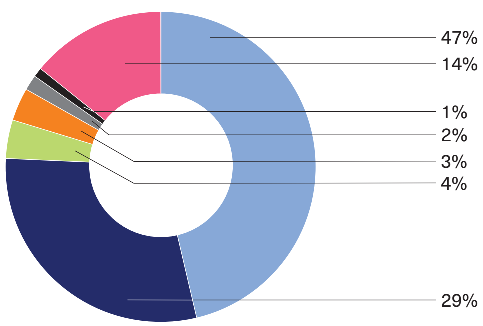
Source: Media release by Department of Minerals and Energy
* Includes MIBCO agreemen for Fourcourts attendants which was only effective 1st Jan 2020

Figure 10 *95 Octane petrol: Gauteng retail price 2 147 c/l in December 2024*



Contribution to the basic price	1 073.128 c/l
Government duties and levies	606.430 c/l
Zone differential	82.800 c/l
Wholesale margin	94.990 c/l
Secondary storage	38.000 c/l
Secondary distribution	18.800 c/l

Figure 11 *Diesel (0.005% S): Gauteng wholesale price 1 932.45 c/l in December 2024*



Contribution to the basic price	983.670 c/l
Government duties and levies	618.330 c/l
Zone differential	82.800 c/l
Wholesale margin	73.300 c/l
Secondary storage	38.000 c/l
Secondary distribution	18.800 c/l
Retail margin	299.500 c/l
Pump rounding	0.200 c/l

Source: Media release by Department of Minerals and Energy

Figure 12 *93 Octane petrol: Gauteng retail price 2 115 c/l in December 2024*

Maximum retail price of liquefied petroleum gas price breakdown

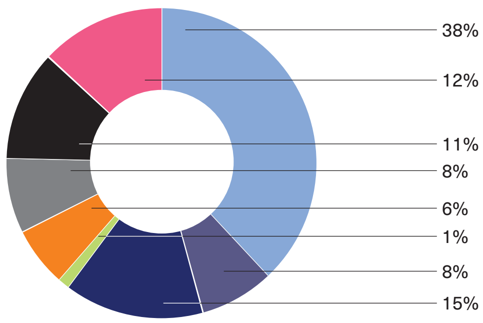


Figure 13 *LPG: Gauteng Max Retail price 3 816 c/kg in December 2024*

Maximum refinery gate price	1,440.61 c/kg
Primary transport costs	302.575 c/kg
Operating expenses	568.494 c/kg
Working capital	43.092 c/kg
Depreciation	232.915 c/kg
Gross margin: Cylinder-filling plant	297.612 c/kg
Retail margin (15%)	432.794 c/kg
Value Added Tax (15%)	497.713 c/kg

Source: Media release by Department of Minerals and Energy

Fuels taxation history - South Africa (rates at 31 December each year)

Petrol

Year	Customs & Excise Duty	Fuel Levy	Road Accident Fund Levy	Petroleum Products Levy	Demand Side Management Levy*	Total Imposts
2014	4.0	224.5	104.0	0.15	10.0	342.65
2015	4.0	255.0	154.0	0.15	10.0	423.15
2016	4.0	285.0	154.0	0.33	10.0	453.33
2017	4.0	315.0	163.0	0.33	10.0	492.33
2018	4.0	337.0	193.0	0.33	10.0	544.33
2019	4.0	361.0	198.0	0.33	10.0	573.33
2020	4.0	363.0	207.0	0.33	10.0	584.3
2021	4.0	393.0	218.0	0.33	10.0	625.3
2022	4.0	394.0	218.0	0.33	–	616.3
2023	4.0	395.0	218.0	0.33	–	617.3
2024	4.0	396.0	218.0	0.33	–	618.3

* DSML only on 95 ULP in zones 07A, 07C, 08A, 08C, 09A, 10A, 09C, 10C, 11A, 11C, 12C, 13A, 13C, 14C, 15C, 15A, 16C, 17A, 17C and 19A.
Gauteng retail price (95 octane c/l) - December 2023: 2325.
Taxes and levies as a % of this retail price: 25.13%.

Diesel

Year	Customs & Excise Duty	Fuel Levy	Road Accident Fund Levy	Petroleum Products Levy	IP Tracer Dye Levy	Total Imposts
2014	4.0	209.5	104.0	0.15	–	317.7
2015	4.0	240.0	154.0	0.15	–	398.2
2016	4.0	270.0	154.0	0.33	–	428.3
2017	4.0	300.0	163.0	0.33	–	467.3
2018	4.0	322.0	193.0	0.33	–	519.3
2019	4.0	347.0	198.0	0.33	0.01	549.4
2020	4.0	363.0	207.0	0.33	0.01	574.3
2021	4.0	379.0	218.0	0.33	0.01	601.4
2022	4.0	380.0	218.0	0.33	0.01	602.3
2023	4.0	381.0	218.0	0.33	0.10	603.8
2024	4.0	396.0	218.0	0.33	–	618.7

Gauteng wholesale price (0.005% S) c/l - December 2023: 2181.49.
Taxes and levies as a % of the wholesale price: 26.33%.

The total annual amounts of fuel taxes collected on petrol, diesel and paraffin (calculated on 2024 sales volumes at June 2024 rates)

	Petrol	Diesel
Sales volumes (million litres)	9 302	12 946
95 unleaded petrol in the DSML area (million litres)*	–	–
Customs and excise duty (c/l)	4.00	4.00
Fuel levy (c/l)	396.00	396.00
Road accident fund levy (c/l)	218.00	218.00
Equalisation fund levy (c/l)	0.00	0.00
Value Added Tax (VAT)	0.00	0.00
Demand side management levy (DSML) (c/l)	0.00	0.00
IP marker levy (c/l)	0.00	0.10
Petroleum products levy (c/l)	0.33	0.33

	Million rands		Total
Customs/ excise duty	372	518	890
Fuel levy	36 834	51 265	88 100
Road accident fund levy	20 277	28 222	48 499
Equalisation fund levy	–	–	–
Value Added Tax (VAT)	–	–	–
Demand side management levy (DSML) [1]	–	–	–
IP marker levy [2]	–	13	13
Petroleum products levy [3]	31	43	73
Total [4]	**57 514**	**80 061**	**137 575**

Source : DMRE / CEF

[1] Only applicable to 95 octane unleaded petrol sold in the inland zones - at the end of the May 2024 pricing period.

[2] Levy added to diesel to cover costs of marker added to illuminating paraffin recovered by the oil industry.

[3] The levy is used to cover the cost of the National Energy Regulator for regulating the petroleum pipelines industry.

[4] These values do not include allowable rebates for diesel to certain sectors (such as forestry and NSRI) allowed by SARS.

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Abbreviations

ACSA	Airports Company of South Africa
B-BBEE	Broad-based black economic empowerment
Bbl/day	Barrels per day
BEE	Black economic empowerment
BUSA	Business Unity South Africa
CHIETA	Chemical Industry Education and Training Authority
CO2e	Carbon dioxide equivalent
CSI	Corporate social investment
DOE	Department of Energy
HDSAs	Historically disadvantaged South Africans
HRD	Human resource development
IEA	International Energy Agency
IeC	Integrated Energy Centre
IK	Illuminating kerosene
INDC	Intended nationally determined contribution
IP	Illuminating paraffin
Kb/day	Thousand barrels per day
LFC	Liquid Fuels Charter
LOE	Leadership in Oil and Energy Certificate Programme
LPG	Liquefied petroleum gas
MMT	Methylcyclopentadienyl manganese tricarbonyl
MIBCO	Motor Industry Bargaining Council
MDZ	Magisterial district zones
MPP	Multi-product pipeline
MTT	Ministerial task team
NEMA	National Environmental Management Act
NEMA: AQA	National Environmental Management: Air Quality Act
NERSA	National Energy Regulator of South Africa
NICOLA	Network for Industrially Contaminated Land in Africa
NOSCP	National Oil Spill Contingency Plan
NPA	National Ports Authority
NPR	National Ports Regulator
NPEA	National Petroleum Employers Association
NSDS	National Skills Development Strategy
NSDS III	National Skills Development Strategy III
OPEC	Organisation of the Petroleum Exporting Countries
OPRC	Oil Pollution Preparedness, Response and Co-operation
PPA	Petroleum Products Amendment Act
PPC	Parliamentary Portfolio Committee
PPP	Public-private partnership
RAF	Road Accident Fund
RAS	Regulatory accounting system
RON	Research octane number
SAMSA	South African Maritime Safety Authority
SBM	Single buoy mooring
SETA	Sector Education and Training Authority
SETs	Sectoral emission targets
SSP	Sector Skills Plan
TFR	Transnet Freight Rail
TOR	Terms of reference
TPL	Transnet Pipelines
WACC	Weighted average cost of capital

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FUELS INDUSTRY
Association of South Africa

FUELS INDUSTRY
Association of South Africa

2024

ANNUAL REPORT ANNEXURE

Statistics

Aggregate financial results of SAPIA members

Year ended 31 December	2014*	2015*	2016*	2017*	2018*	2019*	2020*	2021	2022	2023*	2024
Operating profit (R/m)	1 448	18 814	19 017	15 003	7 699	5 864	(22 119)	12 850	4 834	12 539	11 452
Interest paid (R/m)	(1 393)	(1 336)	(880)	(1 227)	(1 279)	(2 066)	(1 205)	(1 756)	(2 196)	(4 167)	(2 998)
Income tax (R/m)	15	(3 712)	(3 577)	(3 870)	(1 122)	(1 642)	1 913	(2 689)	(480)	(3 260)	(2 325)
Net income (R/m)	69	13 766	14 560	9 906	5 298	2 156	(21 411)	8 405	2 158	5 112	6 129
Total assets (R/m)	114 458	115 110	125 088	171 123	143 654	156 007	140 295	173 341	199 731	198 870	183 042
Capital expenditure (R/m)	9 659	6 031	6 502	7 666	4 628	9 623	4 109	2 941	8 368	27 812	1 948
Refinery shutdown	646	666	342	780	891	1 120	187	288	3 604	688	974
Other	9 014	5 365	6 160	6 886	3 737	8 502	3 922	2 653	4 764	27 124	974
After tax return on assets (%)	–	12	12	6	4	1	(15)	5	1	3	3
Sales volumes (bn litres)	31	34	33	31	31	31	25	26	30	39	36
Net income after tax (c/l)	–	40	44	32	17	7	(85)	32	7	13	17

Individual company financial data aggregated by Mr C McClelland CA(SA) (independent industry consultant).

Notes

*2014 data reported by 15 SAPIA members.

*2015 data reported by 12 SAPIA members.

*2016 data reported by 9 SAPIA members. PetroSA data is estimated.

*2017 data reported by 12 SAPIA members.

*2018 data reported by 9 SAPIA members.

*2019 data reported by 10 SAPIA members.

*2020 data reported by 8 SAPIA members.

*2023 data reported by 8 SAPIA members.

Value added statements

	2014*	2015*	2016*	2017*	2018*	2019*	2020	2021	2022	2023	2024
Turnover (R/bn)	365	300	321	310	405	425	348	419	592	598	576
Net cost of products and services (R/bn)	280	202	198	186	254	273	223	265	423	438	415
Total value added (R/bn)	**85**	**98**	**123**	**124**	**151**	**152**	**125**	**154**	**169**	**160**	**161**
To pay employees gross salaries, wages and benefits (R/bn)	6	6	6	7	6	7	7	7	8	7	7
To pay the State tax in the form of											
Income tax (R/bn)	0.02	4.00	4.00	4.00	1.00	2.00	(1.38)	3.00	3.00	3.00	3.00
Duties and levies (R/bn)	72	83	94	114	145	131	130	135	145	122	124
To pay providers of capital											
Net finance expense (R/bn)	1	1	1	1	1	2	2	3	4	6	5
Dividends (R/bn)	1	3	4	–	–	4	2	–	5	1	8
Retained for future growth											
Depreciation (R/bn)	3	5	6	5	4	5	5	4	12	5	5
Retained income / other for the year (R/bn)	2	(4)	8	(7)	(7)	1	(21)	2	(8)	16	9
Total value added (R/bn)	**85**	**98**	**123**	**124**	**150**	**152**	**125**	**154**	**169**	**160**	**161**

Individual company financial data aggregated by Mr C McClelland CA(SA) (independent industry consultant).

*2014 data reported by 15 SAPIA members.

*2015 data reported by 12 SAPIA members.

*2016 data reported by 9 SAPIA members. PetroSA data is estimated.

*2017 data reported by 12 SAPIA members.

*2018 data reported by 9 SAPIA members.

*2019 data reported by 10 SAPIA members.

Workforce profile

The table below reflects the combined workforce profile for direct employees of Fuels Industry Association member companies and its refineries as reported to the Department of Labour in October 2024. It should be noted that the petroleum industry supports direct and indirect employment for over 100 000 people.

Note: A = Africans, C = Coloureds, I = Indians and W = Whites

Occupational levels	Male				Female				Foreign nationals		Total
	A	C	I	W	A	C	I	W	Male	Female	
Top Management	13	3	12	7	19	1	3	3	5	2	68
Senior Management	124	33	52	57	87	21	33	29	14	2	452
Professionally qualified and experienced specialists and mid-management	491	206	196	162	504	126	95	97	10	8	1 895
Skilled technical and academically qualified workers, junior management, supervisors, foreman and superintendents	808	369	120	161	643	229	72	110	10	2	2 524
Semi-skilled and discretionary decision making	1 280	257	57	46	483	86	21	20	3	2	2 255
Unskilled and defined decision making	127	14	1	1	100	4	2	1	0	0	250
TOTAL PERMANENT	**2 843**	**882**	**438**	**434**	**1 836**	**467**	**226**	**260**	**42**	**16**	**7 444**
Temporary Employees	21	16	1	3	28	1	1	0	2	1	74
GRAND TOTAL	**2 864**	**898**	**439**	**437**	**1 864**	**468**	**227**	**260**	**44**	**17**	**7 518**

Health, safety and environment performance indicators covering distribution activities outside the refinery gate

Performance indicators	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
(Not including refineries)												
Safety: staff and contractors												
Fatalities	9	14	10	3	5	0	1	0	2	10	2	2
Lost time injuries	26	25	16	23	27	33	9	14	13	18	43	23
Hours worked (million)	28.9	31	34.9	65.4	71.5	70.1	53.2	26.6	25.4	26.1	26.9	26.9
Total recordable rate (TRR), fatalities, lost time injuries and medical treatment cases per 200 000 hours worked.	**0.4**	**0.6**	**0.2**	**0.3**	**0.4**	**0.3**	**0.4**	**0.2**	**0.2**	**0.3**	**0.4**	**0.5**
Environment:												
Fires	29	21	32	31	31	18	13	9	9	20	10	5
Health:												
Occupational illnesses	1	1	1	1	1	3	0	0	6	6	1	1
Security:												
Hijackings	9	9	9	0	6	2	5	8	10	15	8	4
Cash-in-transit robberies	11	17	24	26	54	26	12	15	12	18	19	14
Retail robberies	214	274	410	381	787	431	363	401	377	413	332	546

Crude refineries resource consumption and waste/emissions

		2017	2018	2019	2020	2021	2022	2023	2024
Water usage: litres	**Total**	**6 490 410**	**7 467 484**	**10 116 875**	**6 645 051**	**3 952 137**	**2 049 557**	**2 302 066**	**3 384 005**
	Municipal	6 490 410	6 895 681	7 792 703	6 023 085	3 952 137	1 854 513	2 302 066	3 328 487
Electricity consumption: Gwh		1 176	967	933	754	605	374	428	408
SO_2 emissions: tons		17 308	16 385	19 348	13 936	10 312	4 782	7 110	9 050
PM emissions: tons		945	1 108	576	425	258	141	214	389
CO_2 emissions: tons		3 445 407	3 509 640	3 524 088	2 071 895	2 307 580	1 283 247	1 706 099	1 708 887
Waste: tons	**Total:**	**42 785**	**49 017**	**43 227**	**44 655**	**37 892**	**43 100**	**35 833**	**44 557**
	Hazardous:	36 105	41 492	34 266	40 130	32 500	33 601	33 000	40 315
	Non-hazardous:	6 680	7 525	8 961	4 525	5 392	9 499	2 833	4 242

Crude and coal/gas to liquids refineries health & safety indicators

Indicator	2018	2019	2020	2021	2022	2023	2024
Fatalities	0	2	3	2	0	1	1
Lost time injuries (LTI)	55	23	33	19	37	30	35
Exposure hours	52 602 045	53 046 089	54 522 263	37 222 328	39 284 514	38 824 501	38 487 548
Occupational illnesses	36	62	53	29	22	19	22
Total Recordable Rate (TRR) (fatalities, LTI and medical treatment cases per 200k hours worked).	**1.29**	**1.5**	**1.13**	**1.15**	**0.4**	**0.6**	**1.34**

FUELS INDUSTRY
Association of South Africa