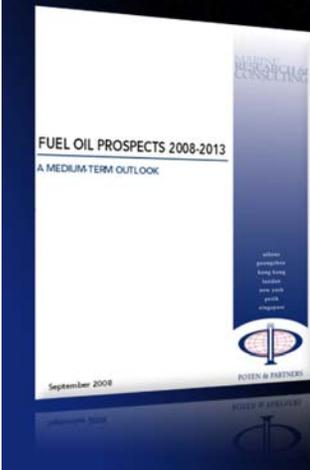




# Fuel Oil Prospects 2008-2013

## A Medium Term Outlook on the Fuel Oil Market



The fuel oil industry will continue its pace of fast-changing developments. Fuel oil, "the bottom of the barrel product", has experienced supply swings reflecting the offsetting effects of heavier crude slates and refinery upgrades which favor production of lighter and more profitable petroleum products. At the same time residual fuel is experiencing a rapid increase in consumption by the marine industry and a decline in consumption by the electricity and manufacturing industries. Fuel oil specifications requirements are being modified to reflect increasing environmental concerns. The market has also seen a significant increase in terminal and storage activity as trading companies capitalize on arbitrage opportunities.

Poten & Partner's *Fuel Oil Prospects* provides a comprehensive assessment of the fundamental factors impacting the residual fuel markets. It is intended to bring insight to residual fuel industry professionals such as refiners, traders, power companies, industrial firms, bunker companies, tanker owners, storage companies, and banks around the world.

### Comprehensive analysis of the Fuel Oil Market

**Fuel Oil Prospects 2008-2013** provides a medium term outlook on the global fuel oil market with particular focus on refining implications and the marine bunker market. It examines the evolving changes in the regulatory environment, and their impacts on fuel oil quality and refining capability. The study also includes a detailed assessment of the trends in marine transportation for residual fuel by vessel class.

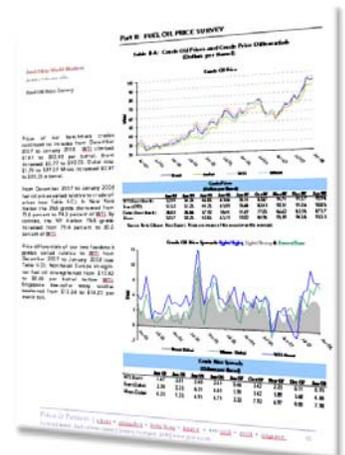
**Scope** – The study is global in scope and looks at fuel oil production, demand by inland and marine bunker consumption, along with imports and exports on a country and regional basis. The trend in pricing relationships between high sulfur fuel oil, low sulfur fuel oil, and crude oil is examined. The study also provides an overview of the key fuel oil storage locations and terminal operators on a regional basis.

**Major Benefits** – The Study's findings are a valuable resource for companies and individuals involved in the fuel oil trade. It provides an in-depth analysis of the key trends in manufacturing, quality, marine transportation, pricing and regulatory impacts. The insights generated from Potem's Study team will have particular benefit for:

- Fuel Oil Physical and Paper Traders
- Refiners and Marketers
- Tanker Owners, Operators and Charterers
- Power Companies
- Bunkering Companies
- Terminal and Storage Operators



Poten & Partners' Study team conducted primary research to update actual supply and demand data for 2003 through 2007. Our experienced professionals and Industry experts extended the analyses of the key trends in production, consumption, quality, imports and exports to develop a medium term outlook through 2013.





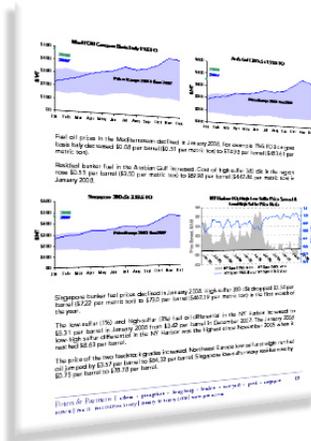
# Fuel Oil Prospects 2008-2013

A Medium Term Outlook on the Fuel Oil Market

**Fuel Oil Prospects 2008-2013** will look at the key supply and demand fundamentals by Country and will include the following major areas of content:

- Introduction
- Executive Summary
- Regulatory Environment
- Pricing Relationships
- Fuel Oil Vessel Movements
- Fuel Oil Storage Terminals
- World Overview
- Regional Overviews
  - North America
  - South America / Caribbean
  - Europe
  - Former Soviet Union
  - Middle East
  - Far East
  - Africa
- Summary / Conclusions

**Fuel Oil Prospects 2008-2013** will come in a hard-bound reference book and also be available in PDF format. Published October 2008.

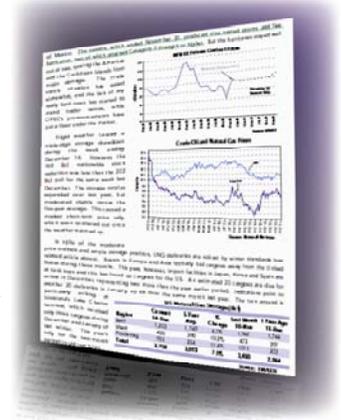


### Study Price:

- First Copy \$12,000
- Additional copies: 2-5 \$1,500 per copy
- 6 or more \$1,000 per copy

### Capability Statement

Poten & Partners has been in existence for more than 60 years, and while it originated as a ship broker it has expanded into providing a range of commercial and consulting services related to supply, cargo trading, and transportation of crude oil, petroleum products, condensates, naphtha, liquefied petroleum gas, liquefied natural gas, chemicals, and chemical gases. The company currently employs 135 staff members and has offices in New York, London, Athens, Singapore, Perth, Hong Kong and Guangzhou.



Poten's various consulting groups provide a full-range of consulting services on LNG, LPG, marine transportation, and crude oil and refined products. Major energy companies seek Poten's advice and eight of the worlds top ten energy companies currently purchased our multi-client research reports and studies. Poten has completed work for major oil and gas companies, national oil companies, tier-one investment banks and privately-held clients.

### CONTACT US

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