



Oil Express

exclusive report serving informed petroleum marketers nationwide

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Gasoline Price Barometer

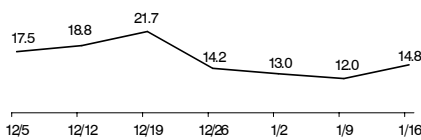
What is the true value of a gallon of regular gasoline in the U.S.? Is it the \$2.50/gal spot price in Chicago or the \$2.90/gal price in Los Angeles? Perhaps you opt to go with the \$2.80/gal number on the Gulf Coast, where most of the country's fuel is being produced.

The point is this: gasoline prices are strewn all over the board with huge regional differences evident. Excess domestic crude and high refinery runs are depressing values in the Midwest and Rockies, while more expensive offshore crude and refinery shutdowns are elevating prices in New York and on the West Coast.

Demand patters are redefining the gasoline market. The Department of Energy reported the lowest weekly deliveries in more than a decade. Four-week demand is off 6.1% from last year.

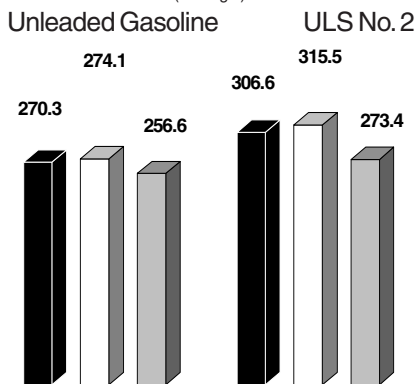
BP said in a report this week that gasoline will fuel less of the transportation sector over the next 20 years. Renewable fuels, hybrid cars and natural gas will take a larger share.

National Rack-to-Retail Margins (Averages in cts/gal)



Source: OPIS Retail Fuel Watch
For more information call 1-888-301-2645.

Average U.S. Contract Price (in cts/gal)



Source: Oil Price Information Service

■ Current Week □ Previous Week ▒ Year Ago

Shell revises fleet rebate program

Shell has switched to paying fleet credit cardholders a cents-per-gallon commercial fleet rebate instead of a percentage of net fuel dollar purchases effective March 1, 2012, the company said in a bulletin to branded wholesalers.

The major is following a trend that kicked in over the last few years after gasoline topped \$3.50/gal, jobbers say. The fleet rebates used to be 1%-3% of net fuel dollar purchases, but most refiners have shifted to a cents-per-gallon discount to control their costs.

Shell told its wholesalers it wanted to bring the Shell Commercial Fleet Plus Rebate program in line with other Shell card and loyalty programs that feature cents-per-gallon rewards or rebates. The company said the program revision will still leave it in a "leading position" in the industry on rebate savings.

(continued on page 2)

Tasty chicken requires crowd control

Four Corners Chevron of Oxford, Miss., makes chicken so finger-licking good it got a mention in national gourmet magazine Bon Appetit in 2009.

Customers line up outside the store to order the locally famous "chicken on a stick," which has been on the menu at Four Corners Chevron for 15 years. During a normal week, the store sells an average of 700 of the chicken sticks. But when there's a home football game at the University of Mississippi, the store sells 500 to 700 daily on Thursday, Friday and Saturday.

The product is served hot on a wooden skewer like a corn dog but is similar to the breaded chicken strips sold at restaurants. Raw chicken strips are dunked in egg bath and rolled twice in a special coating before they're deep-fried.

The sticks retail for \$3.25 each or \$4.07 as a meal with two potato logs and a roll. The profit margin is 50%-60% and the price is in line with other fast food outlets. Four chicken nuggets retail for \$3.15 at Chick-fil-A Inc., and McDonald's charges \$1.99-\$4.99 for four to 12 ounces of popcorn chicken.

Store manager Lynn Hall likes how the chicken strengthens the store's brand, but she's had to adopt these crowd control measures:

- **Keep the momentum.** Preparation begins at 8 a.m. and goes on all day in the 24-hour store, which is a short walk from campus and nearby bars. Sales spike from midnight to 2 a.m.
- **Beef up chicken staff.** On game weekends there are two full-time chefs, two full-time cashiers and a runner for all-around help related to the food sales.
- **Plan lockouts.** When it's really crowded Hall locks the door and lets in only as many as go out, nightclub style. She's also adding an extra cash register and an extra fryer.

Joe Bush, jbush@opisnet.com

Gasoline Supply Barometer

With gasoline demand at such paltry levels, it's impossible to think anyone could be worried about supply.

Another refinery is closing that supplies gasoline to New York (Hess' Hovensa facility at St. Croix) but most of the reaction minimized any impact on supply.

Citgo, Hess's partner in the refinery, says it will arrange supply from alternative sources, so it doesn't seem concerned.

BP's Chief Economist Christof Ruehl said global oil refining is in "dire" straits over the next two decades because of excess capacity.

The latest gasoline stock count from the Department of Energy recorded a 3.7 million barrel rise in gasoline inventories.

Over the last three months U.S. gasoline supplies have grown by 23 million barrels, a rate of almost 2 million barrels per month.

It seems a bit hypocritical to explain crude oil's high price in the context of supply and demand, yet global threats of a supply disruption from Iran continue to cloud markets.

The rebate will be 3cts/gal for 300 through 3,499.99 gal; 4cts/gal for 3,500 through 7,999.99 gal; 5cts/gal for 8,000 through 9,999.99 gal; and 6cts/gal for 10,000 gal or more.

Shell also is introducing a 15cts/gal rebate for new accounts starting March 1, 2012. New customers for wholesalers enrolled in Shell's Fleet Finder program can earn a 15cts/gal rebate for fuel gallons purchased for 12 consecutive monthly billing cycles from the date the account was opened.

The special new account incentive will be the only rebate offer for these new accounts during their first year. The Shell Commercial Fleet Plus Rebate does not apply.

Shell said it will continue to support its jobbers' efforts to win new commercial accounts through the Fleet Finder program, which offers financial incentives to participating wholesalers for using Shell's training and support.

The Shell Fleet Plus program was introduced in 1996, offering commercial customers benefits such as online reporting, driver and vehicle controls, no monthly card or report fees, as well as rebates.

Donna Harris, dharris@opisnet.com

Shell rewards entice dealers

As Shell begins rollout of its Fuel Rewards Network (FRN) program, some dealers are begging jobbers to rebrand their stations to Shell.

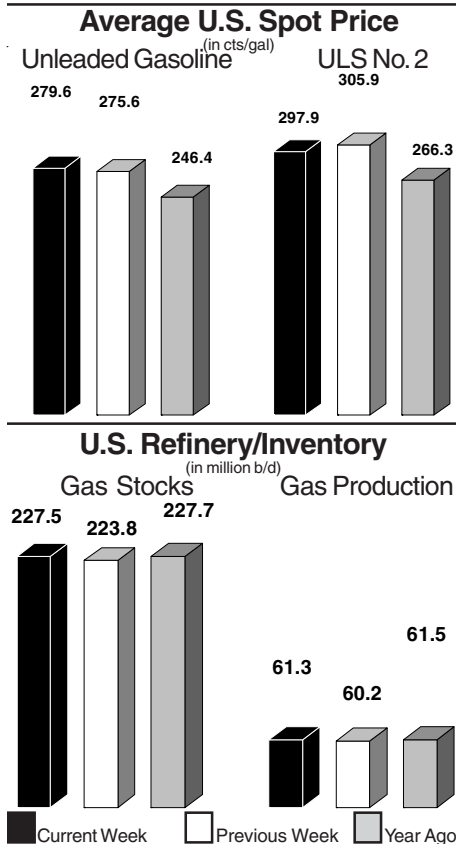
The comprehensive program started with fuel discounts tied to grocery store purchases, but this year is being expanded to other large merchants such as Gap, Home Depot, Staples, Best Buy, Bass Pro and Travelocity. Customers can also obtain fuel discounts with purchases at 11,000 restaurants around the country. And Shell e-coupons for products sold at groceries and drugstores also provide cents-per-gallon discounts.

The program is free and there's no limit to the amount of fuel rewards customers can earn.

Shell marketers can customize special offers promoting extra fuel rewards on products they select. Some examples from Shell's latest brochure:

- **Single product:** Purchase one Monster Energy Drink, earn 5cts/gal.
- **Combo product:** Purchase a sandwich and fountain drink, earn 8cts/gal.
- **Auto service or carwash:** Purchase an oil change or carwash, earn 15cts/gal.
- **Continuity:** Purchase four coffee or fountain drinks at once or over time at the same station, earn 10cts/gal.

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Driver shortage hikes transportation costs

A shortage of commercial truck drivers threatens to increase oil industry shipping costs and pinch profit margins.

The National Tank Truck Carriers (NTTC) says overall turnover for commercial drivers has hit 75%. The trucking industry is short 188,000 drivers, NTTC says.

Turnover for more highly skilled tank truck drivers is lower at about 40% but still “unacceptable,” NTTC President John Conley said during a recent webinar.

Tank truck drivers are more specialized and better trained, having to transport hazardous materials. They earn 10%-15% more than typical commercial drivers, as much as \$75,000 annually. And that pay could increase 30% by 2014 as the driver pool shrinks, NTTC said.

The cost of recruiting and training one tank truck driver is about \$7,500, Conley said.

Carriers downsized during the recession. Now that the economy is picking up, they’re trying to hire drivers, but many drivers exited the industry. The quality and quantity of applicants has declined, NTTC says.

The commercial driver population also is aging. Baby Boomers are retiring. The trucking business lacks appeal for younger workers, many of them turned off by the long hours on the road and on weekends.

And growing regulation is discouraging prospective drivers and making it more costly and time-consuming to enter the business, carriers say.

“We can’t let the driver go the way of the gas station attendant,” said Steve Rush, president of Carbon Express Inc. of Wharton, N.J. “Equitable compensation is long overdue.”

Recruit and keep them

Pay a referral bonus to your drivers who recruit other truckers, instead of paying new recruits hefty sign-on bonuses. “Your best recruiter is your driver,” said Rush.

On overnight trips, Carbon Express also puts its drivers up in a motel, rather than having them sleep in the truck, he said.

Here’s what else the industry is doing to attract and keep good truckers:

- Split the referral bonus. Groendyke Transport Inc. of Enid, Okla., pays a \$2,000 bonus, \$1,000 to recruit the trucker and another \$1,000 to mentor the new hire for a year.
- Advertise that you have electronic logs, which make it easier to keep track of hours, says Rush.
- Advertise “no HAZMAT required” so that drivers can gradually meet the hazardous materials licensing requirements after they’re employed.
- Advertise “no experience required” to allow new drivers with potential to learn on the job. “We don’t advertise specifically for a tank truck driver,” said Rush. “Close to 70% of our drivers had no tank truck experience.”
- Pick up the cost of the commercial driver’s license and HAZMAT license.
- Work with the military to hire veterans coming home to civilian life, said Greg Hodgen, president of Groendyke. The company promotes that it is “military friendly” on its website and Facebook page.
- Provide auxiliary power units so that if truckers are sleeping in the truck they can have heat and air conditioning, as well as a small refrigerator. There are laws against excessive idling.
- Arrange truckers in rotating shifts so that they can have at least part of the weekend off.
- Keep the lines of communication open. Some carriers inform drivers with company newsletters, for example. “Drivers want to know what’s going on and give suggestions,” said Barbara Windsor, CEO of Hahn Transportation Inc. of New Market, Md. “They want to be heard and they want respect.”

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Top 3 regs that cost you truckers

Since 2010, three major changes have affected or will affect commercial drivers and their employers: the hours of service rules, a ban on hand-held mobile telephones and the Compliance, Safety and Accountability program.

Here's a summary of what those rules mean to you:

- 1. Hours of Service.** Driving time is reduced and rest breaks are mandated. Violations of more than three hours over the limit can result in a \$2,700 fine for the driver and \$11,000 for the carrier. Drivers can now drive 10 hours of a 14-hour day, down from 11; they can only be on duty for 13 hours of the 14-hour day, or a 16-hour day, which they can choose twice in any seven-day period. "The drivers aren't going to be able to make any time," says Tom White, safety director for White Brothers Trucking of Wasco, Ill.
- 2. Ban on hand-held mobile phones.** Starting earlier this month, drivers must only use hands-free technology. Violators face a driver fine of \$2,750 and a carrier fine of \$11,000. White says this regulation affects drivers the most because it is easily spotted. In contrast, an hours of service violation is discovered by inspecting the drivers' logs.
- 3. CSA 2010.** The Compliance, Safety and Accountability program was initiated by the Federal Motor Carrier Safety Administration (FMCSA) to measure carrier safety performance. The carrier's record of violations are subject to thresholds. Penalties vary based on a sliding scale of severity, frequency and risk. At the very least, carriers might receive recommendations for improvement. At worst, the feds can shut down their operations.

White says the CSA 2010 has resulted in more frequent and more stringent inspections, which means more paperwork for him. He says that since it took effect in mid-2010 there has been a 20% increase in the number of fines for his company.

And more regulation is on the horizon, says Rob Abbott of the American Trucking Association (ATA). Look for the feds to mandate onboard electronic monitors of driver work hours. The FMCSA proposed this in 2010, but it may take until 2016 for it to become a regulation, says Abbott. The cost: \$600 to \$2,000 per device.

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Biodiesel biz needs self-policing

San Francisco – The alternative fuels industry must police itself against Renewable Identification Number (RIN) fraud, said a key biodiesel industry leader.

Eric Bowen, chairman of the California Biodiesel Alliance, said the biodiesel industry "needs to solve the problem of ensuring that RINs are valid."

Bowen said RIN fraud will have the biggest impact on small producers who are least able to bear the cost of additional regulation.

RINs are a tool used in the administration of the renewable fuels standard. They are a tradable currency, used by obligated parties and exporters to show compliance with the regs, as well as to track renewable fuel volumes.

But some fuel producers are allegedly gaming the system. In early October 2011, the federal EPA confirmed that a federal case charging the founder and CEO of a Maryland-based biodiesel producer with RIN fraud is the first such case to go to court. Sources confirmed that EPA was investigating at least seven potential RINs-related cases as of July 2011.

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Virginia considers first pump toll

You've heard of motor fuel taxes and highway tolls. But if proponents have their way, Virginia could introduce a pump toll.

The Virginia General Assembly has titled House Bill 802 the "Virginia Pump Toll" or "FareShare." And the Petroleum Marketers Association of America says the fee would be a first.

"If it goes in Virginia, lots of states will try to copy," says PMAA President Dan Gilligan.

The bill, which has been referred to the Virginia House Committee on Finance, would impose a toll of 50cts on consumers anytime they pump fuel and another 50cts when they buy 35-plus gal. There would also be a \$1 toll on each 12-gal sale of gasoline from a transport truck or tank wagon and on each 60-gal sale of diesel fuel from a transport truck or tank wagon.

The legislation also would impose a yet-to-be-determined toll on the bulk purchase of clean fuel other than electricity at a rate equal to \$1 times the volume of clean fuel required to fill the average size fuel tank to three-quarters full; and 50cts on the sale of clean fuel at an electric vehicle charging station.

The revenue from FareShare would be used for highway maintenance in the area where the fuel is sold, and the amount of the toll would increase by 10% every five years. If it passes, the legislation would take effect Jan. 1, 2013.

The Virginia Petroleum Convenience and Grocery Association said it believes fuel taxes should be assessed at the pump, not tied to an artificial index, and should be transparent to the industry and the public.

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Mansfield Oil restructures for expansion

Mansfield Oil Co. just formed a holding company—Mansfield Energy Corp.—as part of a strategic initiative to continue to grow and diversify its interests under the Mansfield brand.

"The formation of Mansfield Energy Corp. allows us to move into the future while remaining true to our core customers," said Mansfield Energy Corp. CEO Michael Mansfield.

Mansfield said the company's transportation fuels business has evolved beyond refined petroleum products and now includes liquefied and compressed natural gas, specialty chemicals and renewable fuels.

The holding company "provides the needed flexibility to evolve and grow our business in support of its long-range objectives," he said.

The restructuring plan also involves the following personnel moves:

- Mansfield Oil's president, J. Alexander, has been promoted to president of Mansfield Energy Corp., where he will focus on managing the company's asset portfolio, acquisitions, joint ventures and corporate initiatives.
- Former executive vice president and CIO, Doug Haugh, has been named president of Mansfield Oil Co. to lead the transportation fuels business.
- CFO John Byrd will lead the administrative and accounting teams as executive vice president of administration and CFO.

Mansfield Oil Co. has been ranked as one of the top 50 privately held companies in America by Forbes magazine. Founded in 1957, the company has achieved double-digit growth for three decades.

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Mystic tank owner loses properties

The United States will seize certain properties of Leonard Baldari, the owner of New York heating oil suppliers Mystic Tank Lines Corp. and Anchor Transit Corp., for his role in a \$75 million heating oil scam, court documents say.

Baldari will forfeit to the U.S. all his rights, title and interest in \$50 million in a recent court development. The forfeiture includes Mystic Tank Lines Corp., Anchor Transit Corp., National Industrial, Steinway Realty, his properties and New York bank accounts. The forfeiture will also include Baldari's interest in the asset purchase agreement between Mystic Tank Lines and Prospect Transportation Inc.

Mystic Tank Lines changed its name to Anchor Transit Corp., which has more than 200 heating oil trucks serving the Northeast and Mid-Atlantic regions, according to its website. The company is based in Astoria, Queens. The company delivers heating oil, kerosene, gasoline, diesel, biodiesel, jet fuel, av gas, lubricants, asphalts and cement.

In 2009, Mystic sold more than 100 trucks from its jet fuel and motor fuel delivery business segments to New Jersey trucking company Prospect Transportation. Sources said that Mystic once boasted a truck fleet of more than 300 trucks prior to the federal crackdown in 2008.

Asset Disposal

The U.S. will publish notice of the order and its intent to dispose of the forfeited assets. It may also provide written notice to any person known to have an alleged interest in the forfeited assets.

Any person, other than the defendant, asserting a legal interest in the forfeited property may petition the court for a hearing without a jury within 30 days of publication of the notice or receipt of the notice. The U.S. Treasury Department will dispose of all the money and property that has been forfeited if no third party files a timely claim.

Baldari, 57, together with Michael David Hiller, 58, the treasurer of Mystic Oil, are expected to be sentenced in the U.S. District Court Eastern District of New York soon, a court official told Oil Express. Sentencing has been postponed several times in the past year.

If convicted, Baldari and Hiller each face maximum sentences of 30 years imprisonment and fines equal to twice their financial gain. The indictment also seeks forfeiture in the total amount of \$75 million each.

The fraud case was considered a "black eye to the New York heating oil industry." Some competitors and fuel suppliers had gag orders on any discussion about Mystic and T&S, fearing any implications or links to Mystic.

In July 2007, Baldari, Hiller and two other defendants from T&S Trucking were charged with stealing tens of millions of gallons of heating oil from customers on Long Island and in New York City. The other two defendants from T&S Trucking were sentenced on June 3.

Tonino Solimine, 53, owner of T&S Trucking, faces 60 months in prison, a \$550,000 fine and deportation at the end of his sentence. Eston Clare, 67, the office manager of T&S, was sentenced to one year and one day in prison because of her medical condition. The four defendants also allegedly resold the stolen oil and laundered the proceeds from the sales.

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Pilot Flying J enters supply agreement with coal producer

Pilot Flying J has signed a one-year fuel supply agreement with Xinerger Ltd., a central Appalachian producer of high-quality coal.

The deal expands Pilot Flying J's growing presence as a fuel supplier in the mining industry. The company, the largest operator of travel plazas in North America, is also one of the nation's largest wholesale fuel providers, delivering 500 mil gal of fuel annually to thousands of customers in 47 states and eight Canadian provinces.

Under the Xinerger agreement, the mining company will buy a set number of gallons of off-road diesel fuel at a fixed price to supply its Kentucky, West Virginia and Virginia mining operations.

Jon Nix, Xinerger's CEO, said the agreement helps optimize the company's cost structure to maintain low production costs.

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C-stores fumble the ball on snacks

Convenience stores are missing out on perhaps their best opportunity to sell snacks – the NFL playoffs and the Super Bowl, a survey shows.

Just 4% of consumers responding to the survey said they would buy their NFL playoff and Super Bowl party foods at c-stores. The vast majority – nearly 80% – say they'd buy their game food from a local supermarket, followed by discount stores, mass merchants or warehouse clubs – 43%.

The third annual SUPERVALU Snack Down Survey was conducted online by Harris Interactive involving adults at least age 25 who are involved in preparing Super Bowl snacks.

So what did the fans say they'd buy? Their favorite items are dips and spreads at 32%, followed by chicken wings at 23%, both slightly more popular than last year. Tied for third place at 14% were pizza and salty snacks such as chips, peanuts, pretzels or popcorn.

Better stock up. Fans tend to pig out during the Super Bowl. Some 54% said they eat throughout the game and another 12% said they start snacking before the game.

SUPERVALU Inc., the study's sponsor, is one of the nation's largest supermarket chains with annual sales of about \$37 billion and more than 4,300 stores, many offering motor fuel.

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Dead River buys heating oil company

Dead River will buy the home heating oil division of Webber Energy, marking the second acquisition for the company this winter.

A closing on the deal is expected within 30 days. Dead River will buy Webber's retail heating oil and propane business, but Webber will keep its wholesale business as well as its gasoline and transport segments.

Last month, Dead River took over Fleming Oil, which had extensive heating oil operations in New Hampshire and Vermont. Previously, Dead River sold its c-stores to Circle K, so it has been one of the few companies intent on expansion in the heating oil business.

This has been a particularly rough season for New England heating oil companies with low degree day counts, and high wholesale prices. The move should enable Webber to concentrate on its other businesses.

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Subway on growth tear

The Subway restaurant chain plans to open 2,500 new locations worldwide in 2012, including 1,100 just in the U.S. and Canada. In 2011, the company added 2,400 restaurants to its network.

One of Subway's key growth strategies is to open restaurants in nontraditional spaces such as convenience stores. Last year, Subway franchisees opened the chain's 8,000th nontraditional location.

Subway was recently named the No. 1 restaurant brand on Entrepreneur magazine's annual Franchise 500 list. Its January 2012 issue also lists Subway as the No. 2 overall franchise opportunity, as well as the second fastest growing franchise and global franchise. Also last year, the Zagat Fast Food Survey ranked the Subway brand No. 1 for food brands with more than 5,000 locations.

It now has 36,000 locations in 98 countries.

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Kum & Go expands in Colorado

Kum & Go, one of the nation's largest independent c-store chains, said it would invest up to \$80 million constructing 20 to 25 new stores in the Colorado Springs and Pikes Peak region of Colorado within the next five years.

Kum & Go plans to break ground early in the first quarter of this year on its first Colorado Springs store. The construction initiative is expected to create about 150 new jobs in the region, said Kum & Go CEO Kyle Krause in an announcement.

"Expanding into the Colorado Springs area made perfect sense to us," Krause said. "We could see that this community is poised for future growth and have thoroughly enjoyed our presence in the Front Range and western Colorado."

The company chose Colorado Springs and Pikes Peak from a group of 85 metro areas in 16 states. Currently, Kum & Go has 39 locations in Colorado and employs more than 370 workers in 15 counties.

Kum & Go has been in business since 1959, starting in Hampton, Iowa, and growing to more than 400 locations in 11 states.

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Multistate distributors merge

Sweetwater Valley Oil Co. of Sweetwater, Tenn., has acquired Benton Oil Co., of Chattanooga, Tenn., and Benton Oil's "Midnite Oil" trademark for an undisclosed price.

Sweetwater will operate from both its Sweetwater office and from the Chattanooga office of Benton Oil. Benton Oil's personnel will remain on staff.

Sweetwater Valley Oil is a licensed motor fuel and lubricants distributor in Tennessee, Georgia, Alabama, North Carolina and Kentucky. It owns and supplies 20 c-stores with branded Marathon, BP, and ConocoPhillips fuel, and will sell fuel oil under the Midnite Oil brand.

Benton Oil has been a wholesaler of motor fuel, fuel oil, and racing fuel in Tennessee, Georgia, Alabama and North Carolina. Its website says it was the first distributor in the Chattanooga area to supply biodiesel to the public.

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Gasoline price hikes ahead in PA

A study from the Pennsylvania Petroleum Marketers and Convenience Store Association (PPMCSA) warns of much higher gasoline prices in western Pennsylvania and potential fuel shortages unless required gasoline specifications are changed before the summer driving season.

The matter is more urgent with the closing of three refineries in southeast Pennsylvania along with the existing rule requiring special gasoline in Pittsburgh and a seven-county surrounding area.

The U.S. Department of Energy already reported closing three refineries in eastern Pennsylvania will result in spot shortages of gasoline and price increases of up to 5 cts/gal, said Don Bowers, motor fuel chair, PPMCSA.

The new study renders a similar judgment, though one Pennsylvania marketer said he thinks the DOE estimates "are too low."

In 1999 the state Department of Environmental Protection adopted a regulation requiring a unique blend of gasoline be sold in Allegheny, Armstrong, Beaver, Butler, Fayette, Washington and Westmoreland counties from May 1 to September 15 with Reid Vapor Pressure (RVP) of 7.8 lbs. per square inch. The much more common U.S. summer gasoline spec has an RVP of 9 lbs. and is easier and cheaper for oil refiners to make.

Complicating the picture even more is another federal rule adopted in the mid-2000s requiring blending ethanol into gasoline, which increases the Reid Vapor Pressure of gasoline.

The state regulation makes the Pittsburgh Region "a virtual island" in terms of gasoline supply. "You need to go over 300 miles away from Pittsburgh to find another area with a similar gasoline requirement," Bowers pointed out.

Last year, a spate of refinery production issues along with pipeline shipping delays pinched 7.8 lb supplies, increasing prices and forcing wholesalers to travel long distances to augment supply. Product outages and gasoline rationing was common.

"Supplies will now have to come from the Gulf Coast, foreign imports, or through pipelines whose capacity to move product is already oversubscribed," Bowers said.

The study says the type of gasoline required in Pittsburgh comprises just 3% of the Mid-Atlantic and New England gasoline market. PPMCSA has asked the Pennsylvania legislature to amend the law to allow for a less stringent gasoline requirement. The association said the shift can be made without sacrificing air quality standard.

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VT mulls huge hike in tank fee

The underground storage tank registration fee (UST) for a single-walled tank could rise tenfold to \$1,000 from \$100 per tank annually under a proposal circulating in the Vermont legislature, reports the Vermont Petroleum Association (VPA). The annual registration fee for a double-walled tank would go to \$125 from \$100, VPA says.

The proposal is now before the House Ways and Means Committee.

Registration fees feed the Petroleum Cleanup Fund. The Vermont Department of Environmental Conservation wants to increase the fund and encourage tank replacement, VPA says.

The state has 305 single-walled tanks at 108 facilities, or 14% of the total tank population. Of those, 40 are owned by single owners and small repair facilities, and 14 owners are distributors that own many double-walled tanks.

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