

Development of the fuel market in Poland in the aspect of development of fuel logistics and changes in legal regulations

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Brief information about UNIMOT S.A.



We offer fuels, energy and gas
under the AVIA brand



PETROL STATIONS



FUELS



LIQUEFIED GAS



NATURAL GAS



ELECTRIC ENERGY



BITUMEN

Fuel import directions in Poland



FUEL TERMINAL



NAFTOPORT



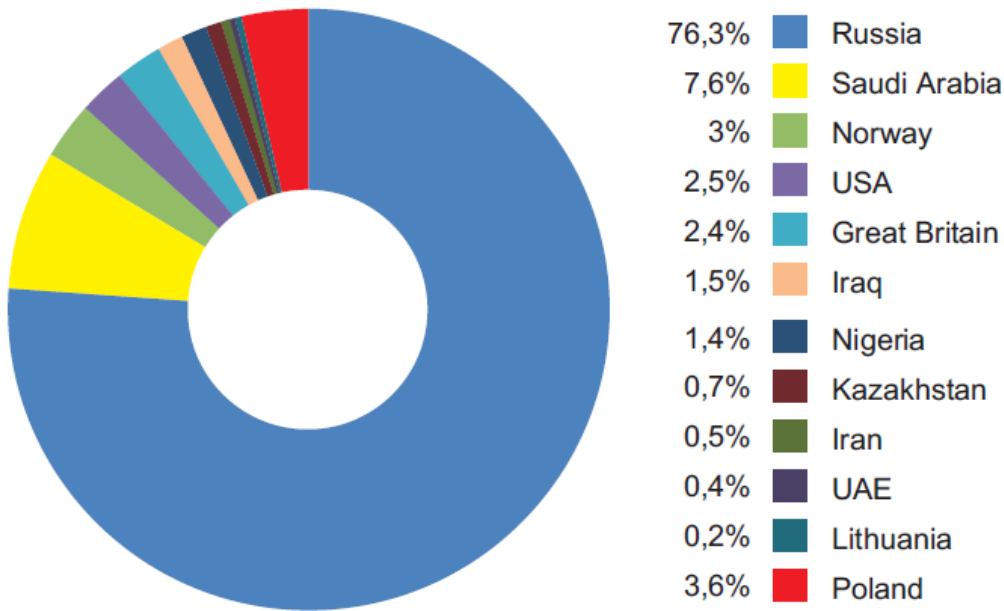
RAFINERY



PIPELINES

SHARE OF CRUDE OIL SUPPLIES TO DOMESTIC REFINERIES IN 2018 [%]

Source: POPIHN's own data

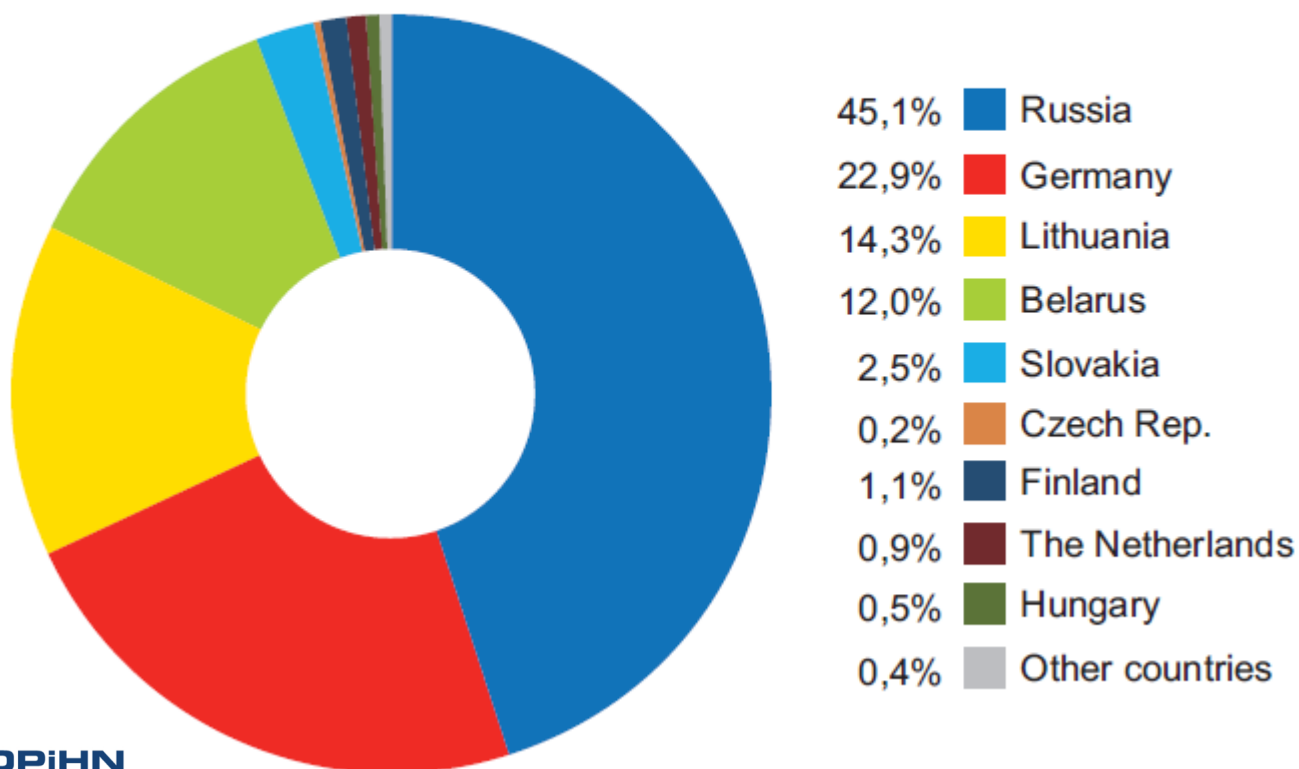


Fuel import directions in Poland

Annually, Poland needs to import over 6 million cubic meters of diesel !!!

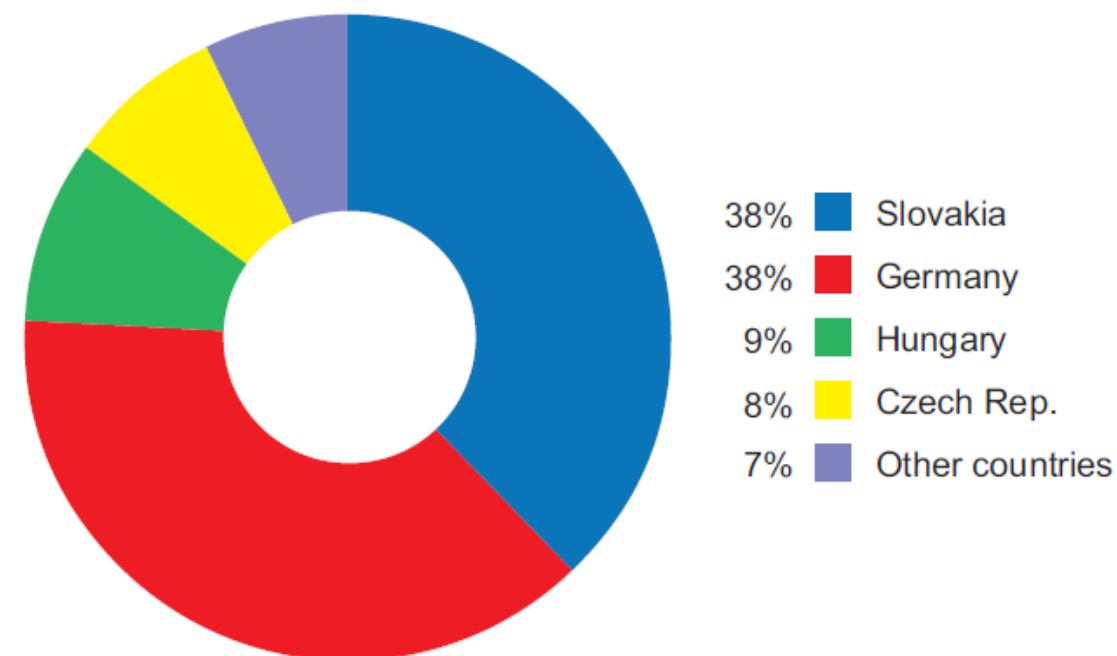
SOURCES OF DIESEL IMPORTS [%]

Source: Ministry of Finance and POPiHN's own data



SOURCES OF PETROL IMPORTS [%]

Source: Ministry of Finance and POPiHN's own data



Plans for the development of logistics infrastructure

In 2023, Poland will achieve independence in the supply of oil and fuels. Independence means import from Russia below 50%!



To diversify supply sources, the logistics infrastructure is being developed:

- In spring 2020 - new tanks at PERN fuel base in Gdańsk
- In autumn 2021, new storage tanks at the Gdańsk Oil Terminal.
- In 2023, the second thread of the Pomeranian pipeline
- The fuel base and the Boronów - Trzebinia pipeline will also be expanded.

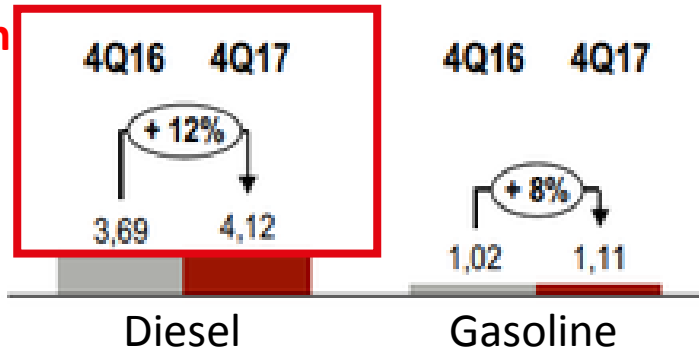
Fight against illegal trade in fuels in various countries



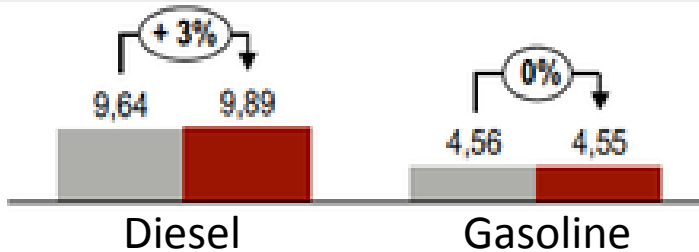
Fuel consumption
(million Tons)



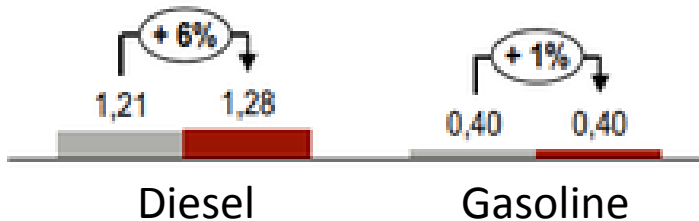
Poland



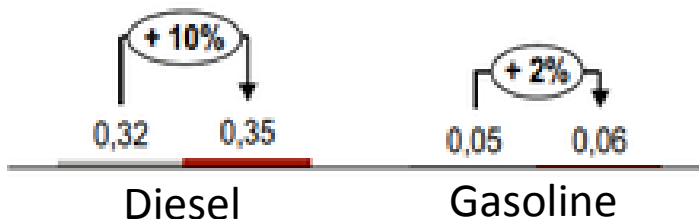
Germany



Czech Republic



Lithuania



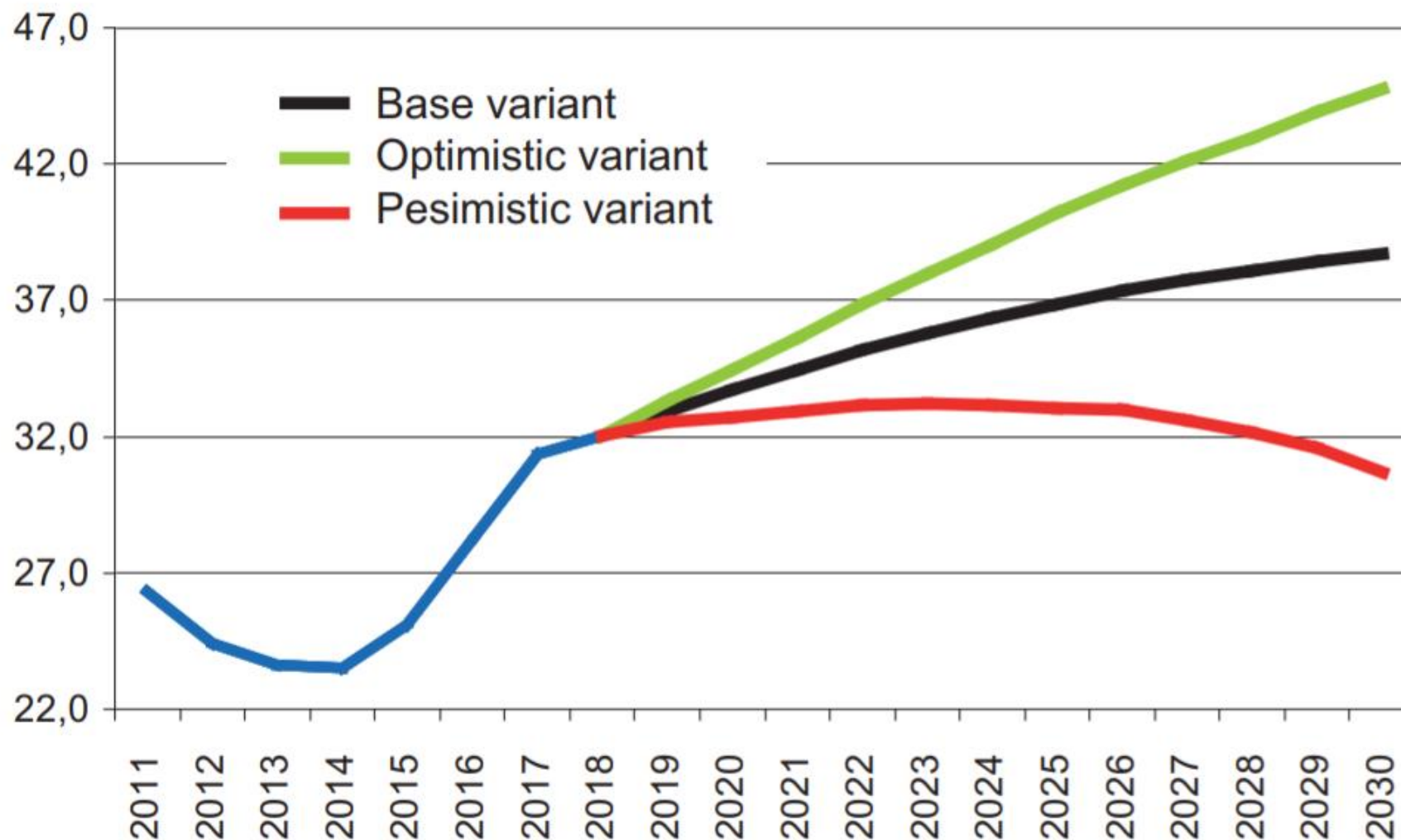
Why the Polish solution turned out to be effective ?

- Security deposit PLN 10 million
- Prepayment for VAT when shopping internally EU
- Introduction of the SENT system
(fuel transport registration and monitoring system)

Source: Report for the fourth quarter of 2017 by PKN ORLEN

Fuel consumption will continue to increase

On the example of the forecast for the Polish market



Poland:

Area: 312,696 km²

Population - 38 mln

Ukraine:

Area: 603,628 km²

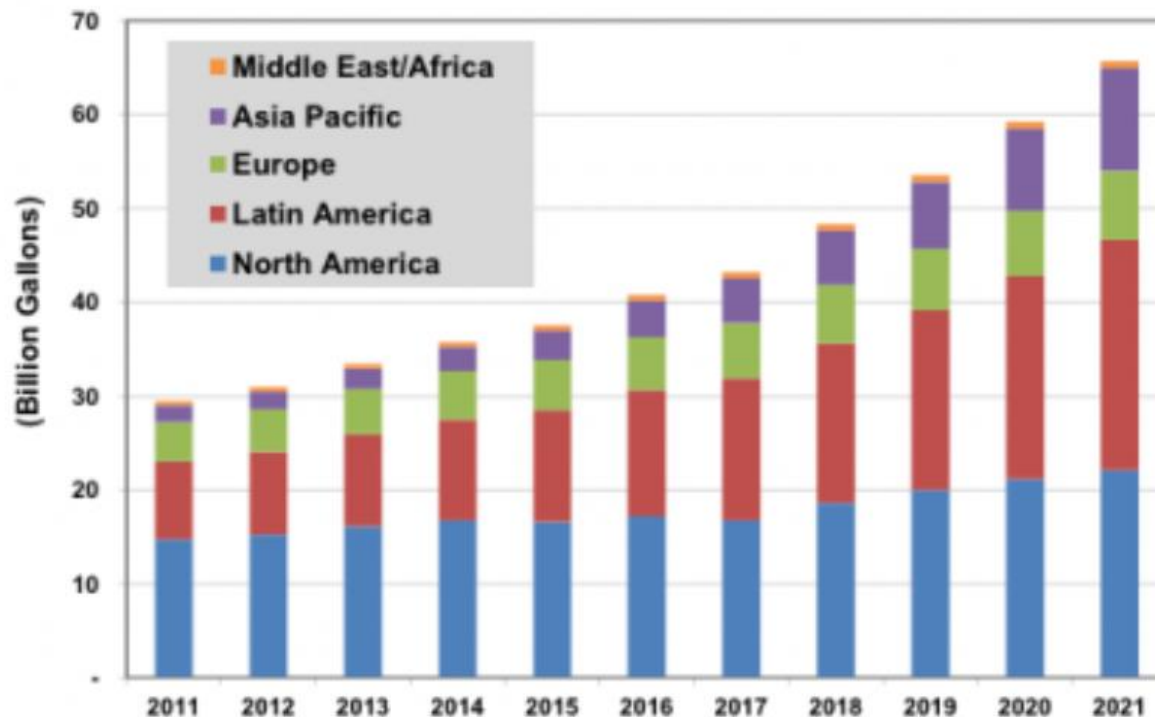
Population - 42 mln

Biofuels – ecological fuel

In Poland, up to 7% of biofuels are added to every liter of diesel fuel

In Poland, up to 5% of biofuels are added to every liter of gasoline

The introduction of biofuels requires legal changes !



Biofuels production - Worlds Markets Source: *Pike Research*



Biofuels – ecological fuel



Most popular biofuels - RME - rapeseed methyl esters

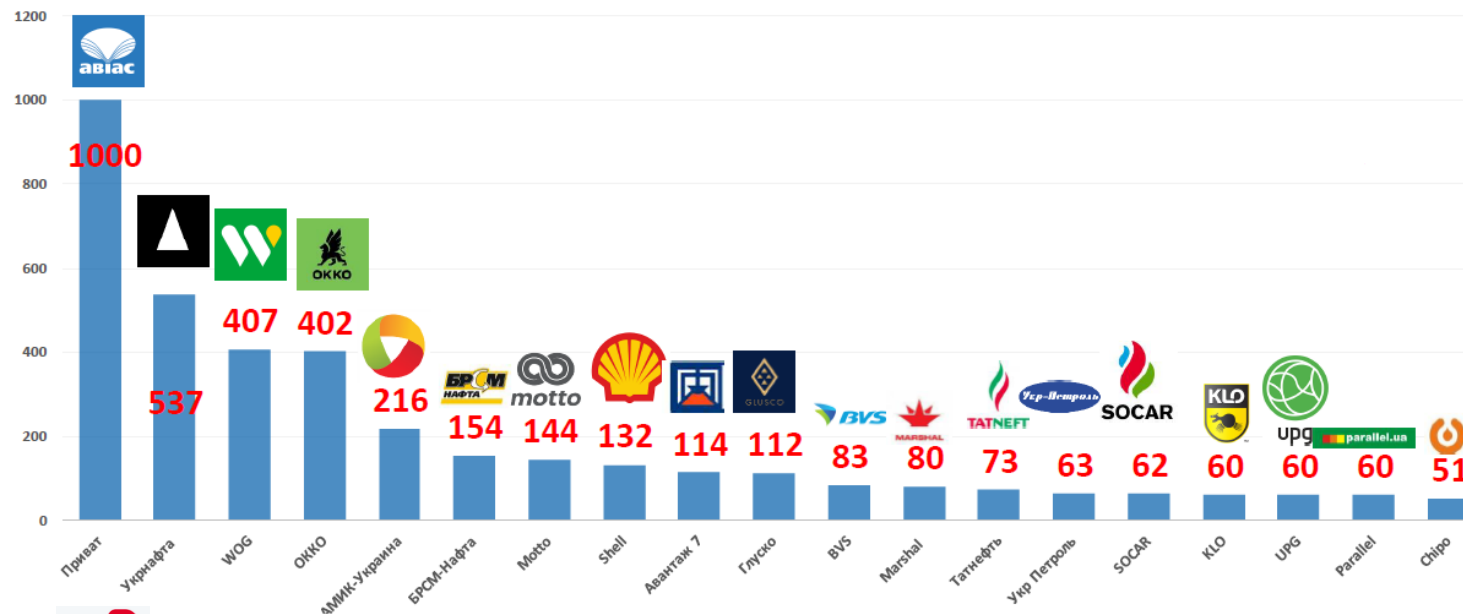
Advantages of using rapeseed:

- *environmental protection*
- *strengthening of agriculture*
- *reduction of fuel import / production*

Rapeseed production in Poland 2,7 million tons !!!

Rapeseed production in Ukraine 3.1 million tons !!!

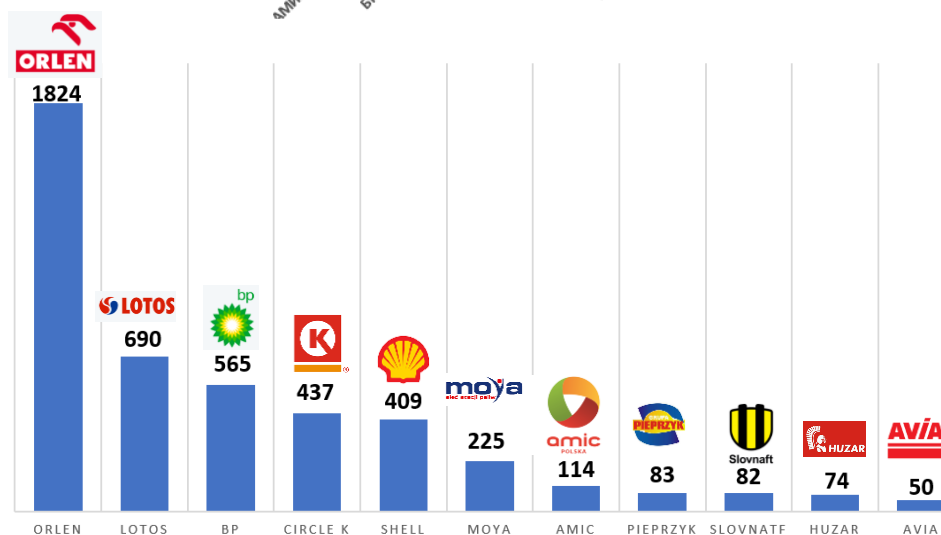
Consolidation trend on the petrol station market



Ukrainian market - over 7,000 gas stations



Data © Argus 2019



Polish market - over 7,000 gas stations



Data © POPiHN 2019

Thank you

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