



# Subcommittees of Aviation Fuels and Infrastructure

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Tuesday June 30th





# Getting to know CLH Group

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# We are the European leaders in oil product logistics and one of the leading companies worldwide



**1<sup>st</sup> company**

in Europe

in terms of extent of pipeline network



**1<sup>st</sup> operator**

in Europe

in terms of volume of aviation fuels managed in airport storage and into-plane services



**2<sup>st</sup> company**

in Europe

in terms of volume of oil product storage capacity\*



**7<sup>st</sup> company**

in the world



**1,700**  
employees



**+ 6,000 km**  
of pipelines



**53**  
Storage facilities



**45**  
Airport facilities



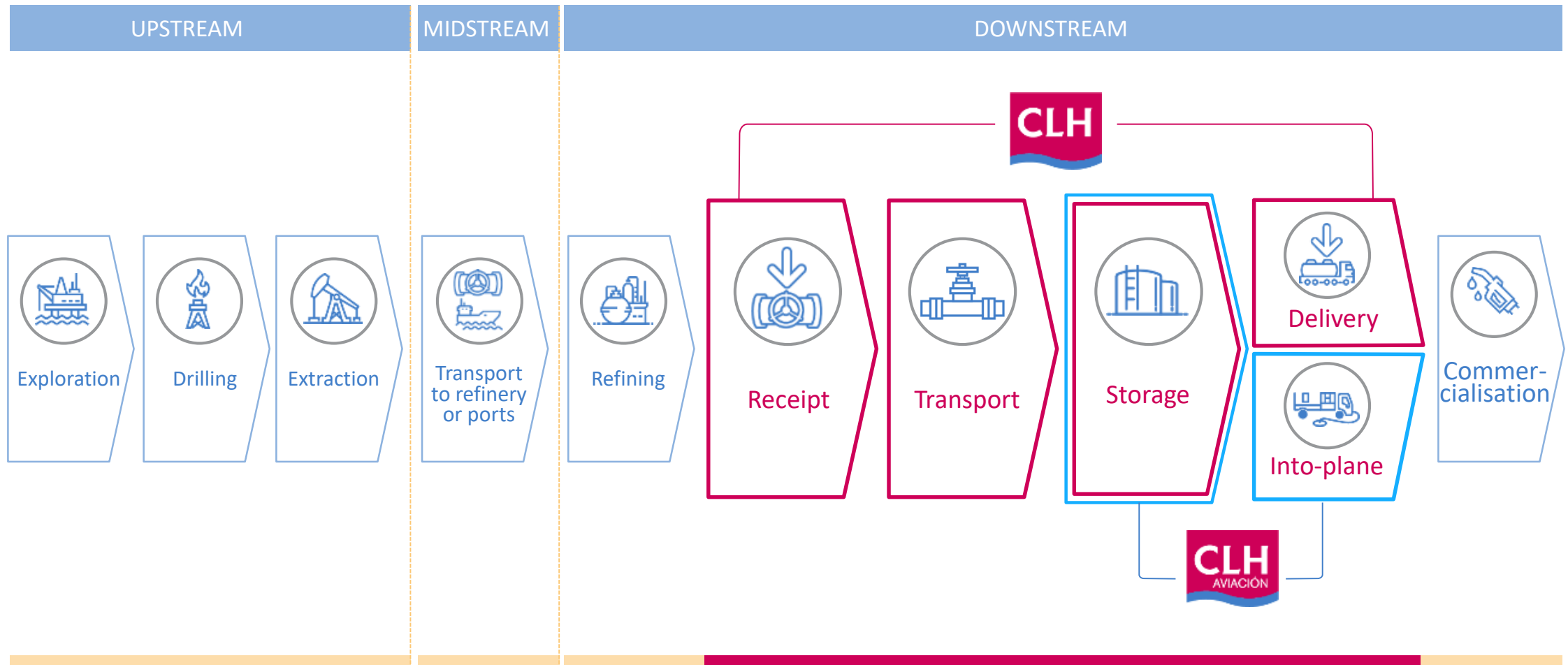
**8.7 million m<sup>3</sup>**  
of storage capacity



**6**  
countries

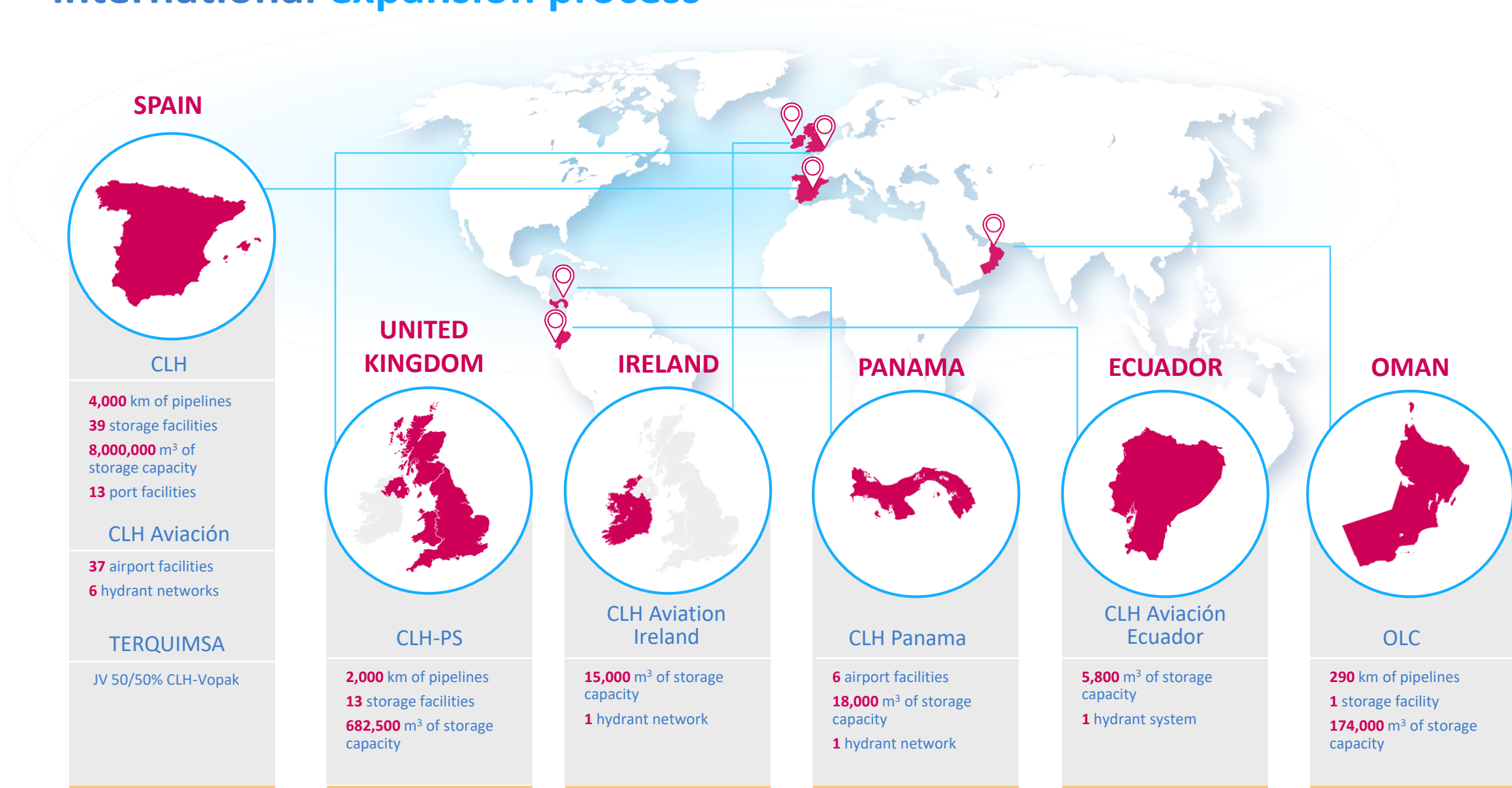
\*Excluding storage in refineries

# Our activity consists of the transport and storage of oil products and the into-plane supply of aviation fuels





# We operate in six countries and are developing an ambitious international expansion process





## Logistics Framework

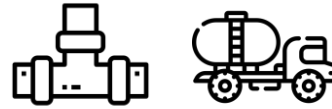
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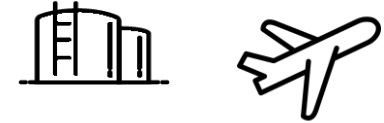
# Fuel Supply Chain Logistics



## Product



## Logistics

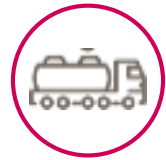


## Airport

- Local Market  
**vs.**  
International Market

- Regulated by local legislation  
**vs.**  
No regulated

- Possibility to **import** product  
**vs.**  
No infrastructure to **import** product (or not allowed)



Only 1 Carrier with same conditions



Multiple carriers



Intermediate fuel facilities (either open or closed)

## There are different models of fuel storage

- Open Access model  
**vs.**  
Not Open Model
- Fuel Farm managed or operated by **Sellers**  
**vs.**  
managed by **Logistics Operators**
  - One Fuel Farm  
**vs.**  
Many Fuel Farms in the airport

**We should focus on fostering competition in each step of the Supply Chain**

# CLH Aviación operates different models



In Spain

## Madrid- Barajas Airport



**Fuel Farm property of CLH Aviación**



**Open Access Model**



**+ 7 Suppliers**



**Competitive Prices**



**Local Refineries + import**

## Barcelona Airport



**Fuel Farm property of Airport Authority**



**FF invested and operated by CLH Aviación**



**Open Access Model**



**+ 7 Suppliers**



**Competitive Prices**



**Local Refineries + import**

*In any case, CLH fosters competition*



# CLH Aviación operates different models



In Dublin



**Fuel Farm property of Airport Authority**



**FF operated, built and invested in by CLH Aviación**



**Long-Term Agreement**



**Entry of new suppliers**

- Before CLH Aviación: 2 suppliers
- After Aviación: 4 suppliers



**Imported product**



**Investment in the Fuel Farm**

Redistribution of tank positioning, construction of fuel loading platforms and new hydrant systems, without affecting the operation of the airport



# CLH Aviación operates different models



In Panama



**Fuel Farm property of Airport Authority**



**Only 1 Operator** for ITP and FF



**Long-Term Agreement**



**Entry of new suppliers**

- Before CLH Aviación: 2 suppliers
- After CLH Aviación: 5 suppliers



**Imported product**



**Improvement of prices and airport operations**



# CLH Aviación operates different models



In Ecuador (Guayaquil)



**Fuel Farm property of Airport Authority**



**FF + ITP operated only by CLH Aviación**



**Long-Term Agreement**



**Only 1 supplier which does:**

- Logistics
- Selling



**Local Refineries**



**Improvement of airport operations**



## There are other types of models...



Only 1 Fuel Farm operated either by

1 One Oil Company

or

2 Joint-Venture of Oil Companies

### Characteristics

Not open market



# There are other types of models...



## Many Fuel Farms

Each **Oil Company** builds **it's own Fuel Farm**

### Characteristics

It has significant **entry barriers** such as:

- High investment
- Difficult to start selling





## Advice for Authorities

- ✓ Only one Fuel Farm. Long-term commitments in case high investments.
- ✓ Independent operator without any relation to a supplier (like CLH Aviación and others)
- ✓ Clarity and transparency in fees to be charged to Suppliers & Airlines
- ✓ Entrance of resellers leading to reduced prices
- ✓ Operator specialized with technical capacity

***CLH Aviación is flexible and promotes competence***

# Thank you



## Contact Us!



**Iván Saco Muiño, Aviation Manager**  
[isacom@grupoclh.com](mailto:isacom@grupoclh.com)



**Almudena Alcaraz, Senior Commercial & Business Development**  
[almudena.alcaraz@grupoclh.com](mailto:almudena.alcaraz@grupoclh.com)



**Fernando Monasterio, Senior Business Development and Commercial analyst**  
[fernando.monasterio@grupoclh.com](mailto:fernando.monasterio@grupoclh.com)



**Patricia Ruiz-Oriol, Commercial & Business Development**  
[patricia.ruiz-oriol@grupoclh.com](mailto:patricia.ruiz-oriol@grupoclh.com)



Titán, 13  
28045 Madrid (Spain)  
Tel.: (+34) 91 774 60 00  
[www.clh.es](http://www.clh.es)