

COULD AUSTRALIA'S TANKS RUN DRY?

AUSTRALIA'S LIQUID FUELS SECURITY

As the world's ninth-largest energy producer, Australia has abundant renewable and non-renewable energy resources. Despite these resources, we are heavily dependent on imports of refined petroleum products and crude oil to meet our liquid fuel demand and our import dependency has increased over recent years. Any major interruption to the supply chain would significantly impact our way of life.



RISK: CONFLICT IN THE MIDDLE EAST COULD IMPACT EUROPEAN FINANCIAL STABILITY

FACT: 40% OF SINGAPORE'S OIL COMES FROM THE MIDDLE EAST

FACT: 51% OF AUSTRALIA'S IMPORTED PETROLEUM PRODUCTS COME FROM SINGAPORE

RISK: CONFLICT IN THE SOUTH CHINA SEA WOULD IMPACT TRADE & SHIPPING

RISK: CONFLICT OR PIRACY COULD IMPACT REGIONAL TRADE & SHIPPING

FACT: FINANCIAL & TRADE SYSTEMS UNDERPIN ALL FUEL SUPPLY CHAINS

OUR FUEL SUPPLY COULD RUN OUT IN WEEKS

AUSTRALIA'S OIL AND LIQUID FUEL STOCKHOLDINGS ESTIMATED AVERAGES

- 2 WEEKS** STOCKS AT SEA
- 5 DAYS** 10 DAYS MAX. CRUDE TANKS AT REFINERIES
- 2 DAYS** REFINERY
- 10 DAYS** REFINED STOCKS AT TERMINALS
- 3 DAYS** SERVICE STATION STOCKS
- 3 DAYS** MOTORISTS

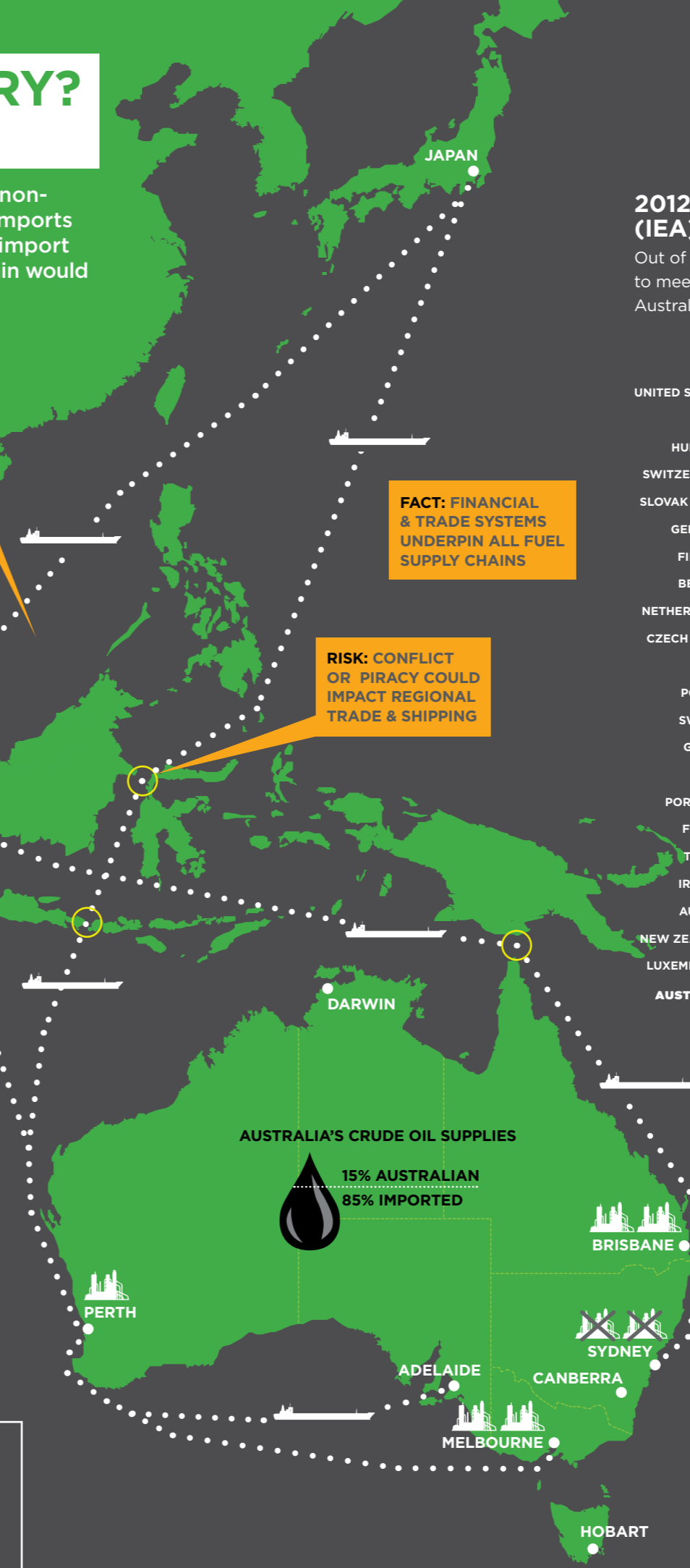
ESSENTIAL GOODS COULD RUN OUT IN DAYS

AUSTRALIA'S ESTIMATED POINT OF SALE STOCKHOLDINGS

- 9 DAYS** DRY GOODS
- 7 DAYS** CHILLED/FROZEN GOODS
- 7 DAYS** RETAIL PHARMACY SUPPLIES
- 3 DAYS** HOSPITAL PHARMACY SUPPLIES
- 3 DAYS** FUEL AT SERVICE STATIONS

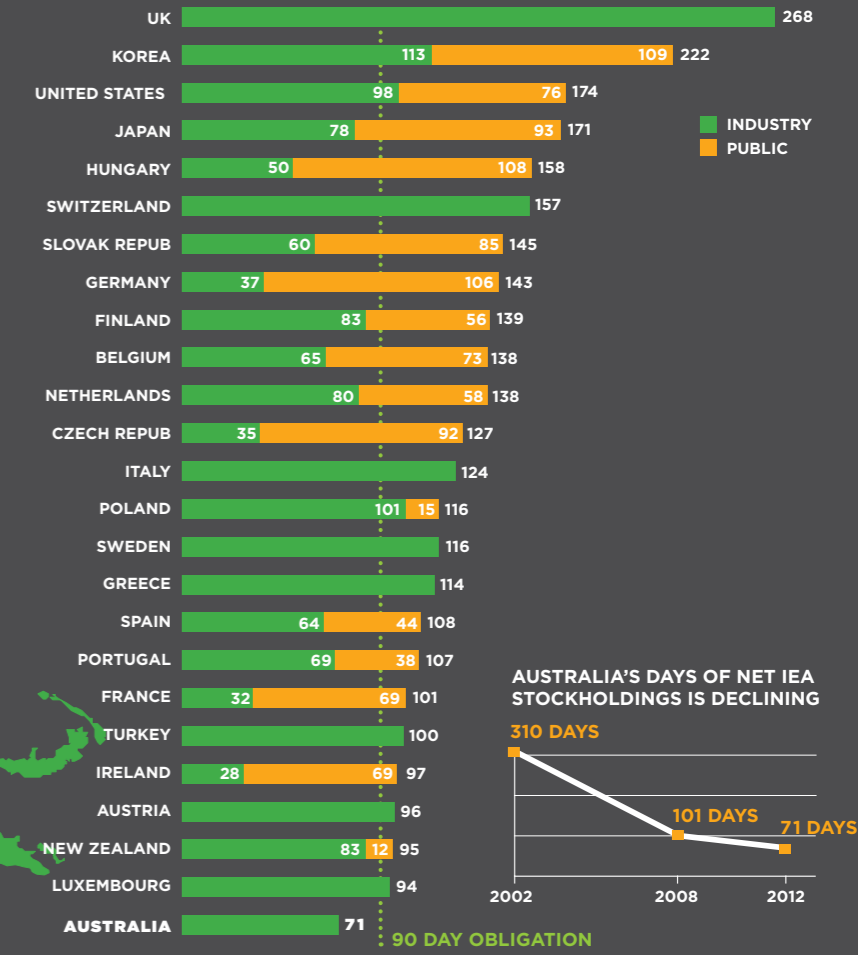
NRMA
MOTORING + SERVICES

NRMA Motoring and Services is working with industry and community leaders calling for a more effective plan to address fuel security vulnerabilities and to develop and use non-oil based alternative fuels and vehicles.



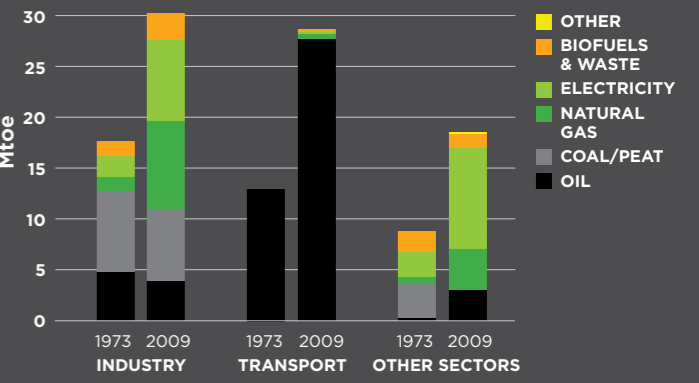
2012 INTERNATIONAL ENERGY AGENCY (IEA) OIL STOCKHOLDING LEVELS IN DAYS

Out of 28 IEA member countries Australia is the only one failing to meet its 90-day net oil import stockholding obligations. Australia could run out of fuel before Luxembourg.



Note: Australia's 71 days of net stockholdings roughly equates to 23 days of actual consumption of liquid fuels.

AUSTRALIAN TRANSPORT REMAINS ALMOST FULLY DEPENDENT ON OIL



Source: Australia's Liquid Fuel Security, John Blackburn AO, February 2013. www.mynrma.com.au/fuelsecurity