

Improve insights, increase trading opportunities

Insights Global

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Take full advantage of accurate and actionable barge product flow data

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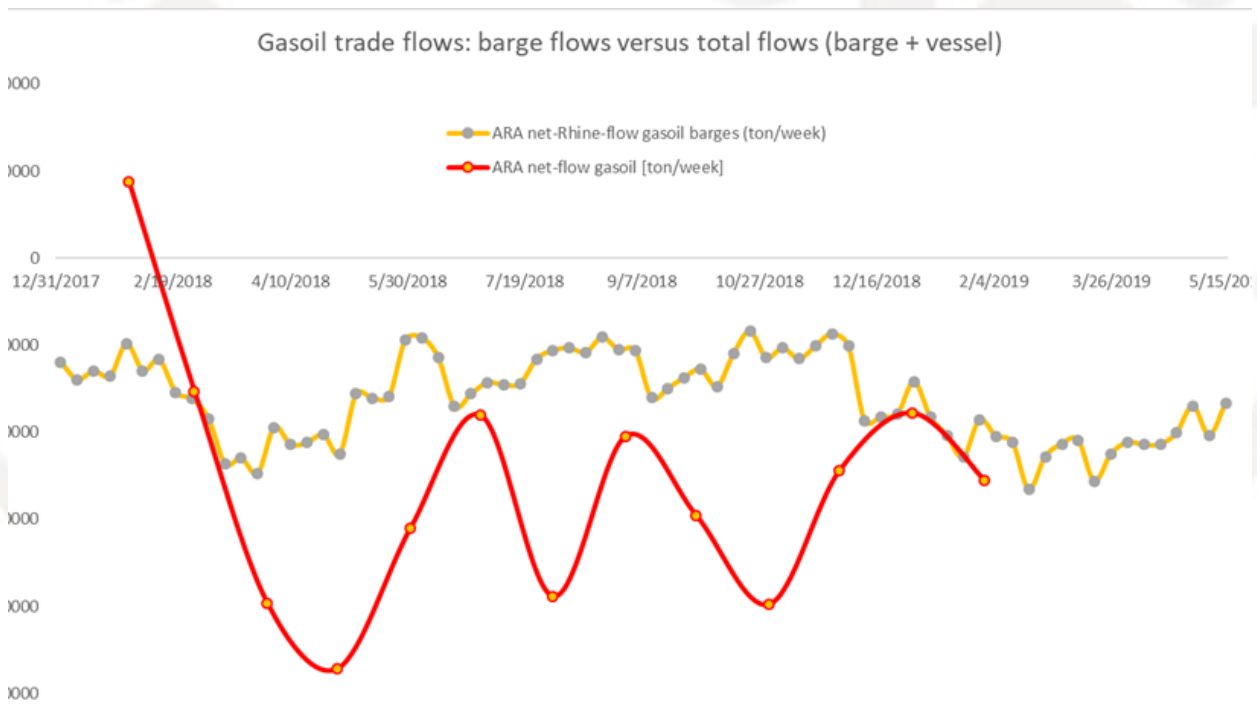
## Introduction

Oil companies’ trading desks thrive on actionable data that support in making better commercial decisions. This will ultimately lead to more earnings for the company and thus a better bonus scheme for the traders. For traders in the ARA a lot of information is at hand but what is missing is insights in the oil products barge flows up and down the Rhine.

## Relevance of barge flows to ARA supply and demand balance

The chart below points out the relevance of the barge flows for the balance in ARA with respect to the products gasoil/diesel. In this chart the Rhine barge flow net-trade volumes are compared with total (barge + vessel + pipeline + rail + truck) net-trade (import-export) volumes for Belgium and Netherlands together.

Chart 1: Barge flows vs total trade flows



Two conclusions can be derived from analyzing this graph:

- a) Gasoil barge flows are a significant portion of the net trade flows. So disregarding them seems no option.
- b) Gasoil barge flows are really volatile, ranging between 86ktons/week and 265ktons/week. So they are hard to predict, but our RFS data provides this data so you don't need to guess.

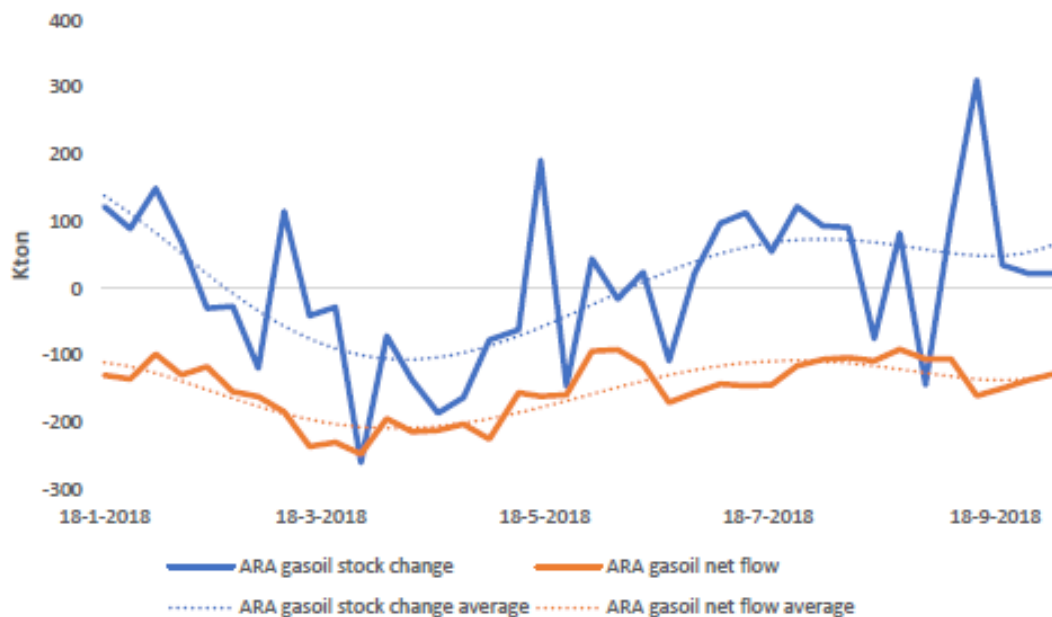
### Rhine barge flow data is correlated with ARA gasoil stock changes

As stated above, Rhine barge flows are big and have a large impact on the balance between S/D in the ARA region. They can make the difference between a stock draw or an increase in ARA gasoil stocks. In another report (file 'ebook RFS ARA Stocks\_rev4.pdf') we actually prove that there is a large and significant correlation between the change in ARA gasoil stocks and gasoil flows going up the Rhine.

See below screen shots for:

- Chart that displays the change in ARA gasoil stocks versus Rhine gasoil flows (page 4 of report): patterns are very similar.
- Regression model output that confirms high correlation, see page 5 of report: this proves the high correlation.

Figure 1: ARA gasoil stock changes and net gasoil flow along the Rhine. Source: PJK International



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