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K. Jv.



mo

Prime Minister

(2)

The conclusion is that steel and chemicals would not be crippled by a 4-8 week shutdown. I will put in one year weekend box.

PRIME MINISTER

MISC 72 - BRITISH RAIL - ASLEF DISPUTE

MCS 31/3

At your meeting on 15 March the Civil Contingencies Unit were instructed to investigate further the impact of a possible rail strike on the steel and chemical industries and on oil supplies.

I attach a report which has been prepared under Civil Contingencies Unit auspices by a group of officials from the Departments of Industry and Energy. It has not been circulated to any other members of the Unit. Advice was obtained in the strictest confidence from the industries concerned.

Inevitably in an investigation of this kind many areas of doubt remain, but as the last paragraph of the note explains, it will be impracticable to go further without a much greater degree of consultation with the industries concerned and consequently much greater risk of the reasons for our interest in these matters at this time leaking out.

I am copying this note and the report to the Chancellor of the Exchequer, the Secretaries of State for Energy, Industry, Transport, Defence, Scotland and Employment and to Sir Robert Armstrong and Mr. Ibbs.

Wolk

30

March 1982

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POSSIBLE IMPACT OF A RAIL STRIKE ON THE IRON AND STEEL AND CHEMICAL INDUSTRIES
AND OIL SUPPLIES

A Note by a group of Officials

INTRODUCTION

1. At a meeting on Monday 15 March Ministers directed that the Civil Contingencies Unit should arrange for the impact of a possible rail strike on the steel and chemical industries and on oil supplies to be investigated further. Following discreet consultations with the industries concerned the following paragraphs show what the effects are assessed as likely to be.

IRON AND STEEL INDUSTRY

2. In the event of an all-out rail strike the British Steel Corporation (BSC) intend to undertake a progressive shut down of their plants. This would mean production being halved within one week and ceasing completely after four weeks. The reason for this move is that the major iron and steel works are designed to be fed by rail and it would be impracticable to deliver by road the volume of material needed to sustain production. Once rail services are resumed some steel making and processing will recover quickly as will deliveries of steel already in process. At the major plants it would take at least four weeks to achieve balanced full production. Depending on the length of the shutdown it is also likely to take some time to regain the lost UK market share.

3. It is believed, in the light of experience during the earlier ASLEF action, that private sector plants, which account for 25 per cent of United Kingdom deliveries would be affected much less than BSC if indeed they are affected at all. Their basic raw materials are substantially different to those used by BSC; their scale of operation gives them more flexibility and thus the ability to operate without rail transport. Stocks of semi-manufactures at the private sector re-rolling companies, normally heavily dependent on BSC, are sufficient to sustain near normal production for about four weeks. All this means that the whole of the private sector would be likely to continue with minimum disruption for several weeks.

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4. Stocks of iron and steel for manufacturing industry stood at 15 weeks at the end of December 1981 and it is believed that the recent ASLEF action did not lead to any significant decrease in that level, thus cushioning manufacturing industry against the direct effects of a rail strike leading to a BSC shutdown. Imports, which account for 25 per cent of United Kingdom steel consumption, and which are mostly handled by road, should still be available and would doubtless increase during the period of any shutdown at BSC.

THE CHEMICAL INDUSTRY

5. Details of the outcome of enquiries in the chemical industry are at Annex A. It seems that an important area of concern is the supply of industrial gases from the British Oxygen Company (BOC) 55 per cent of which travel by rail. There would appear to be a limit on the extent to which suitable specialised road transport could take over from rail delivery. Some customers require daily delivery and stocks held by other users are thought to vary between 3-10 days. Overall it is estimated that the effect of reduced industrial gas supplies, resulting from a complete stoppage of rail delivery, would be felt by industry within about 2 weeks and would be widespread and marked after 4 weeks, though it would vary between regions.

6. Although problems are foreseen in other branches of the chemical industry there is a good chance of alternative supply arrangements mitigating the effects to such an extent that suppliers and their customers would "get by" without serious disruption for 3 weeks - some for longer.

OIL SUPPLIES

7. The Oil Industries' Emergency Committee (OIEC) have been consulted. The information (details in Annex B) provided in confidence by the 14 member companies of the OIEC (who have 95 per cent of the UK market) shows the likely effect on individual oil companies and their customers. The position may be summarised as follows:-

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a. 10-15 per cent of oil products are moved from refineries by British Rail, with 30 out of about 160 main oil distribution terminals dependent on rail supply. There are some 90 major consumers, mostly industrial (notably BSC and ICI) and including some power stations and airports which are normally supplied by rail alone. In view of BSC's contingency plans disruption of their oil supplies is unlikely to be significant but for ICI such action could add to the other problems created by a rail strike. Other industries vulnerable to a major interruption of fuel oil supplies are clothing and textiles and pottery and glass.

b. The rail-fed consumers are by nature large consumers of heavy fuel oil and the volume they require could not be sustained by the road vehicle fleet. The three largest oil suppliers (Esso, Shell and BP, with 60 per cent of the market) expect that the majority of their rail-fed customers would experience oil shortages affecting production within 2-3 weeks of the beginning of an all-out stoppage. Some would be in trouble earlier than this. Other suppliers are less dependent on rail but their customers would experience similar difficulties in a number of places. It is not possible to be more precise about the effect on levels of production - they would be related to the amounts of oil that could be delivered by road.

c. In the event of a rail strike the areas mainly affected would be Thames Valley, Cumbria, the Midlands, and South Yorkshire. The oil industry would try to find alternative ways of keeping their rail-fed oil terminals functioning, albeit at reduced level, and for resupplying affected areas by making longer road journeys. A big increase is expected in demand for motor fuels, from both the private motorist and industry coping with the effects of a rail strike. This will affect the industry's ability to "stretch" road distribution.

d. Some oil companies will try and anticipate these difficulties by building up stocks at their distribution terminals, but others would be reluctant to do so due to the additional expense involved.

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e. In order to avoid the risk of legal action the oil companies would need Government direction if they were to allocate supplies to rail-fed customers at the expense of other consumers. Energy Act powers would be required in these circumstances.

CONCLUSION

8. Although there will be some difficulties resulting from a complete shutdown of the railway system it would seem that none of those revealed by recent discussion with the industries concerned should prove crippling during a shutdown lasting 4-8 weeks. However some customers will be hard hit well within this period and there are likely to be pressures on the Government to take measures to mitigate these effects. An important area of concern appears to be interruption of the supply of industrial gases.

9. No account has been taken in this study of concurrent sympathetic industrial action by other unions. Concurrent action by, for example, petrol tanker and road haulage drivers and dock workers would present a completely different and more serious situation. The prospects of such action are at present assessed as unlikely.

10. The main difficulty in making an assessment of this kind is the lack of previous experience of a complete rail shutdown - there has not been one since 1926. Then the chemical and oil industries were not as large, complex or essential to the life of the nation as they are today. Nor at that time did the majority of freight travel by road. So the assessments made are the best guesses possible and it has not been possible to investigate the "knock on" effect in any detail. Further studies would involve a degree of consultation with the industries concerned that might on security grounds be considered inadvisable, at this stage.

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ANNEX A to a note
by Officials

SUMMARY OF EFFECTS OF A COMPLETE RAIL SHUTDOWN ON THE CHEMICAL INDUSTRY

1. BOC

BOC move liquid argon, nitrogen and oxygen by train. About 55 per cent of their supplies of these liquid gases travel by rail. BOC hold some stocks and stocks held by customers probably vary between 3 and 10 days. Some customers, however, require daily delivery. In the event of a complete rail stoppage, alternative road transport could be made available to a limited extent, but the effect of reduced supplies would be felt by industry within about 2 weeks and would be widespread and marked after 4 weeks. The engineering and food industries would be affected first, though the effect on the latter would be mainly at the luxury end of the business. BOC could increase production, albeit at considerable cost, of the gases in some areas, eg South Wales and North East England, which would help to mitigate the effects of a stoppage, but some other areas, particularly London, would be likely to feel the pinch more. Major steel and chemical works would not be affected since they are supplied by pipeline.

2. ICI

ICI move a minority of their products by rail and assess that the limited flexibility available to them for alternative arrangements (road, sea, swap deals) would enable them and their customers to avoid serious disruption for two and probably three weeks. Supplies would however be at a reduced rate and the effect of this would be cumulative. The chemicals concerned are ammonia, methanol, carbon dioxide, hydrogen cyanide and chlorine. Public health requirements would not be affected, because chlorine for water treatment is supplied in cylinders, which are filled at the manufacturing plant and transported by road.

3. BP Chemicals

Like ICI, BP move a minority of their chemicals by rail (ammonia, which one of their plants requires as a raw material), hydrogen, cyanide, caustic soda and acetic acid. They estimate that, using alternative transport arrangements, they could get by for 2-3 weeks without serious disruption for themselves or their customers. They might have to flare the hydrogen cyanide, which would be expensive.

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Fisons

Fisons use rail transport for ammonia, a major raw material for their fertiliser production. Alternative road transport would be possible, but would be limited by the availability of specialised tankers. About half Fisons' ammonia, however, comes from ICI's plant next door and so production of fertilisers could continue to some extent. The effect of reduced supplies of ammonia would be mitigated by the fact that the peak selling time for fertilisers for spring use would be past.

5. ISC

This company transport hydrofluoric acid and sulphuric acid by rail. Alternative arrangements could probably be made for road transport, but there would be pressure on the availability of specialist tankers.

6. Associated Octel

This company is the sole manufacturer of lead additives for petrol. They rely on rail transport for the movement of chlorine between their Anglesey and Cheshire plants. They were just able to tolerate the 3-day a week strike by ASLEF, but would probably have much more difficulty if there were a complete stoppage. It is possible, however, that they could get chlorine from ICI whose plant is nearby in Cheshire. This would presumably mean that production of chlorine would stop in Anglesey.

Cabinet Office
30 March 1982

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COMPANY	Q.1 ARE YOU TAKING STEPS TO MAINTAIN STOCKS AT A HIGH LEVEL?	Q.2 LIST OF COMPANY TERMINALS WITH ESTIMATED RUN OUT TIMES (DAYS) IF NO FORM OF RE-SUPPLY BY ANY MEANS IS POSSIBLE STATING PRODUCTS AFFECTED	Q.3 LIST ANY DIRECT RAIL-FED CUSTOMERS WITH AN ESTIMATE OF THEIR RUN OUT TIME (DAYS) AND THE PRODUCTS CONCERNED, IF NO PRACTICAL OTHER MEANS OF SUPPLY ARE AVAILABLE	Q.4 HOW WOULD YOU ALLOCATE SUPPLIES/ GENERAL COMMENTS/NOTES?																																																																																																
BP	Yes	<table border="1"> <thead> <tr> <th>Terminal</th> <th>PMS</th> <th>RMS</th> <th>PGK</th> <th>SGK</th> <th>GORV</th> <th>GOCI</th> <th>LFO</th> <th>MFO</th> <th>HFO</th> </tr> </thead> <tbody> <tr> <td>Sheffield</td> <td>8</td> <td>17</td> <td>-</td> <td>32</td> <td>4</td> <td>7</td> <td>11</td> <td>34</td> <td>14</td> </tr> <tr> <td>Thame</td> <td>7</td> <td>10</td> <td>-</td> <td>-</td> <td>11</td> <td>12</td> <td>96</td> <td>30</td> <td>53</td> </tr> <tr> <td>Dalston</td> <td>5</td> <td>7</td> <td>26</td> <td>7</td> <td>6</td> <td>11</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Whittington</td> <td>7</td> <td>19</td> <td>-</td> <td>-</td> <td>17</td> <td>29</td> <td>-</td> <td>-</td> <td>-</td> </tr> </tbody> </table>	Terminal	PMS	RMS	PGK	SGK	GORV	GOCI	LFO	MFO	HFO	Sheffield	8	17	-	32	4	7	11	34	14	Thame	7	10	-	-	11	12	96	30	53	Dalston	5	7	26	7	6	11	-	-	-	Whittington	7	19	-	-	17	29	-	-	-	<p>(i) Airports</p> <table border="1"> <thead> <tr> <th></th> <th>ATK</th> </tr> </thead> <tbody> <tr> <td>Gatwick</td> <td>12 (All COS 10)</td> </tr> <tr> <td>Glasgow</td> <td>18</td> </tr> <tr> <td>Prestwick</td> <td>68</td> </tr> <tr> <td>Stansted</td> <td>10</td> </tr> </tbody> </table> <p>(ii) Authorised Distributors</p> <table border="1"> <thead> <tr> <th></th> <th>PGK</th> <th>SGK</th> <th>GOCI</th> </tr> </thead> <tbody> <tr> <td>Average stocks</td> <td>30</td> <td>16</td> <td>12</td> </tr> </tbody> </table> <p>(iii) Direct customers</p> <table border="1"> <tbody> <tr> <td>RAF Leuchars</td> <td>8 ATK (a)</td> </tr> <tr> <td>CEGB Aberthaw</td> <td>20 MFO/HFO</td> </tr> <tr> <td>CEGB Didcot</td> <td>10 MFO</td> </tr> <tr> <td>CEGB Richborough</td> <td>NK (b)</td> </tr> <tr> <td>CEGB Taylors Lane</td> <td>NK (c)</td> </tr> <tr> <td>BSC Glengamock</td> <td>20 HF2%</td> </tr> <tr> <td>BSC Llanwern</td> <td>16 HF2%</td> </tr> <tr> <td>BSC Ravenscraig</td> <td>10 HF2% (d)</td> </tr> <tr> <td>Reeds Aylesford</td> <td>18 HFO</td> </tr> <tr> <td>Reeds Thatcham</td> <td>7 HFO</td> </tr> <tr> <td>ICI Ardeer</td> <td>10 HFO</td> </tr> <tr> <td>ICI Dumfries</td> <td>14 HFO</td> </tr> </tbody> </table> <p>(iv) Land crude production (rail to Llandarcy)</p> <table border="1"> <tbody> <tr> <td>Wytch Farm, Dorset</td> <td>7 days storage</td> </tr> <tr> <td>East Midlands</td> <td>7 days storage</td> </tr> </tbody> </table>		ATK	Gatwick	12 (All COS 10)	Glasgow	18	Prestwick	68	Stansted	10		PGK	SGK	GOCI	Average stocks	30	16	12	RAF Leuchars	8 ATK (a)	CEGB Aberthaw	20 MFO/HFO	CEGB Didcot	10 MFO	CEGB Richborough	NK (b)	CEGB Taylors Lane	NK (c)	BSC Glengamock	20 HF2%	BSC Llanwern	16 HF2%	BSC Ravenscraig	10 HF2% (d)	Reeds Aylesford	18 HFO	Reeds Thatcham	7 HFO	ICI Ardeer	10 HFO	ICI Dumfries	14 HFO	Wytch Farm, Dorset	7 days storage	East Midlands	7 days storage	<p>Believe that BP can maintain supplies for 7-10 days. Thereafter it may become necessary to distinguish between groups of buyers and at that stage it would be necessary to operate under such Orders as the Government may make.</p> <p>(a) Other reserves may be available</p> <p>(b) Usually sea-fed</p> <p>(c) Peakload only</p> <p>(d) Also access to road fed storage</p>
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Burmah	Not Answered	As under 10% of supplies of bulk products are obtained from rail-fed terminals, customers would not be adversely affected by a rail strike, on the assumption that refinery, sea and pipeline terminals are not picketed	Do not supply any customers by rail	See Q.2																																																																																																
Chevron	Yes	<p>Terminal</p> <p>Kingsbury (a) 20-30 FO (b)</p>	Have no customers wholly dependent upon rail	<p>Not Answered.</p> <p>(a) Managed by Conoco</p> <p>(b) Clean products partly supplied by rail, but anticipate with co-operation of all WOSL partners could maintain supplies by pipeline.</p>																																																																																																

I	II	III	IV	V
4. Esso	Yes	<p><u>Terminal (a)</u></p> <p>Northampton 6 mogas, kero, gasoil Tiverton 6 " , " , " , avtur Carlisle (X) 6 " , " , " , Shrewsbury 6 kero, gasoil Nottingham (X) 6, FO Tunstall (X) 5/6 LPG Purfleet 5 Bitumen Plymouth (X) 10 " Bowling (X) 14 Lubes</p>	<p>i <u>Airports (a) Avtur</u></p> <p>Prestwick (X) 15+ Gatwick (X) 6</p> <p>ii <u>Authorized Distributors (a)</u></p> <p>Oxford 6 mogas, gasoil Cambridge (X) 6 kero, " Reading 6 " , " , mogas Ayr 6 " , " , "</p> <p>iii <u>Direct Customers</u></p> <p>Rolls Royce, Derby (b) Avtur CEGB Drakelow (b) LFO " Uskmouth (b) MFO ICI Dumfries (b) HFO " Steventon (b) HFO Reeds Thatcham (b) HFO (c) Wiggins Hereford (b) HFO/LPG Inco, Clydach (b) LPG</p>	<p>Equal hardship represents typically acceptable basis for allocation. In event of dispute occurring company would endeavour to distribute product on this basis seeking whenever possible to agree reductions in supplies with those customers known to have high stocks or alternative suppliers.</p> <p>While we are able to give information, legal constraint in the absence of formal Government powers mean we must avoid being party to any common industry approach to, or exchange of information of priorities</p> <p>(a) Estimated ability to pick up from alternative sources with own vehicles could be 25% of normal requirements. Some company assistance could improve this picture except in those locations denoted by X.</p> <p>(b) Customers stock levels not normally advised but generally better than company locations. Hence judge unlikely that run-outs will occur within 10-12 days.</p> <p>(c) Shared with road.</p>
Texaco	Not answered	Texaco has only one terminal which could be affected by a prolonged rail strike but supplies to customers could be maintained from alternative pipeline or sea-fed locations.	Texaco has no direct rail-fed customers.	Not answered

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6. Murco	Yes	<table border="1"> <thead> <tr> <th>Terminal</th> <th>Mogas</th> <th>Derv/Gasoil</th> <th>Kero</th> </tr> </thead> <tbody> <tr> <td>Theale</td> <td>9</td> <td>10</td> <td>7</td> </tr> <tr> <td>Bedworth</td> <td>3</td> <td>4</td> <td>6</td> </tr> </tbody> </table>	Terminal	Mogas	Derv/Gasoil	Kero	Theale	9	10	7	Bedworth	3	4	6	No direct customers	Theale and Bedworth will become inoperative in the event of rail strike. Murco will need assistance from other companies in the form of short term exchanges, and we would be glad to know whether any provision for this is under consideration.																																																								
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	Kero	Gasoil	dual																																																																					
Charringtons, Bedworth	20	12	5																																																																					
Charringtons, Cambridge	4	4	5																																																																					
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Phillips	Yes	<table border="1"> <thead> <tr> <th>Terminal</th> <th>Gasoil/Derv</th> <th>Kero</th> <th>FO</th> </tr> </thead> <tbody> <tr> <td>Bromsgrove</td> <td>9.5</td> <td>21</td> <td>14</td> </tr> <tr> <td>Long Eaton</td> <td>7</td> <td>13.5</td> <td>-</td> </tr> <tr> <td>Salford</td> <td>15</td> <td>97.5</td> <td>-</td> </tr> <tr> <td>Leeds</td> <td>14.5</td> <td>134</td> <td>-</td> </tr> </tbody> </table>	Terminal	Gasoil/Derv	Kero	FO	Bromsgrove	9.5	21	14	Long Eaton	7	13.5	-	Salford	15	97.5	-	Leeds	14.5	134	-	No direct customers	We could determine priorities and in so doing would be guided by the HMG essential services list issued at the OIEC Consultative Committee meeting of 20.12.78 and where necessary allocate to customers on basic historic supplies.																																																
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14. Shell	Not until rail strike is (almost) inevitable. Cost of stocking. Stocks at operating level only.	Depends on whether drivers would road deliver; if not, terminals would run out in, on average, 5-7 days; if they will, last for 14-21 days.	Possible upsurge in orders (and stocks) following press coverage of possible rail strike. Stocks last 5-7 days without closing "villages"; 14-21 days when closed. Big industrial consumers would be the real problem.	Best endeavours to allocate priorities, but guidance from HMG necessary												

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