To ensure the downstream sector continues to play this vital part in our energy future, companies will need to:

- Embrace new products, technologies and processes across our industry
  - Energy efficiency, new transportation technologies, such as hydrogen fuel cell vehicles
  - Capturing and storing carbon dioxide
  - New re-refining processes

- Plan for a low-carbon future
  - By 2050 demand for liquid fuels will change, but they will still be needed
  - The facilities of our sector can be an enabler of the low-carbon transition
  - Liquid biofuels could be a key enabling fuel

- Embracing new ways of moving people and goods
  - Changing technology and consumer behaviour will alter how we move by air, land and sea
  - The Forecourt of the Future may need to reimagine the role of mobility

- Putting in place the policies that support and incentivise change
  - Leadership, vision and modular development could put refineries at the heart of decarbonisation

- Work with others to unlock the low-carbon future
  - Opportunities exist for the downstream sector to work with other industries and stakeholders
  - Industrial clusters could unlock the door to a low-carbon economy

- Achieving these ambitions will ensure that the downstream oil sector continues to be:
  - A major contributor to the UK economy
  - A vehicle for our energy transition
  - A world leader in energy innovation

The UKPIA Future Vision for the Downstream Oil Sector

UKPIA Future Vision  |  The Downstream Oil Sector in a Low-Carbon World  |  July 2019

Embracing new ways of moving people and goods across the transport network

Working with others to unlock the low-carbon future

Putting in place the policies that support and incentivise change will mean we must...

Plan for a low-carbon future

To ensure the downstream sector continues to play this vital part in our energy future, companies will need to...

A major contributor to the UK economy

A major contributor to the UK economy

The downstream oil sector plays a big part in the success of UK plc in terms of £21 billion in gross domestic product and the 300,000 jobs it supports.

Embracing new products, technologies and processes across our industry

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