



# Oil & Gas - Refining & Marketing

## Driving forces

The oil refining and marketing industry plays a vital role converting crude oil and other alternative feedstocks into a variety of products. Good environmental management of operations requires the reduction of spills and emissions and is closely linked to cost-competitiveness through the operating availability of refineries and to maintaining compliance with operating permits. Appropriate management of environmental and social issues in the supply chain and contractor health and safety reduce reputational risks. The leading companies are those that are able to minimize these risks and attract an adept workforce. Understanding these issues is an important concern when companies seek to strengthen their refinery portfolios through acquisitions and diversification of their feedstock portfolios. Increasing exposure to sustainable mobility trends such as electric and hybrid vehicles or advanced biofuels means climate strategy is of increasing importance to the industry's future.

## Highlighted criteria & Dimension weight

- Economic Dimension ..... 34%
  - Codes of Business Conduct
  - Risk & Crisis Management
  - Supply Chain Management
- Environmental Dimension ..... 31%
  - Climate Strategy
  - Operational Eco-Efficiency
  - Water Related Risks
- Social Dimension ..... 35%
  - Occupational Health and Safety
  - Human Capital Development
  - Talent Attraction & Retention

## Sustainability leaders 2019

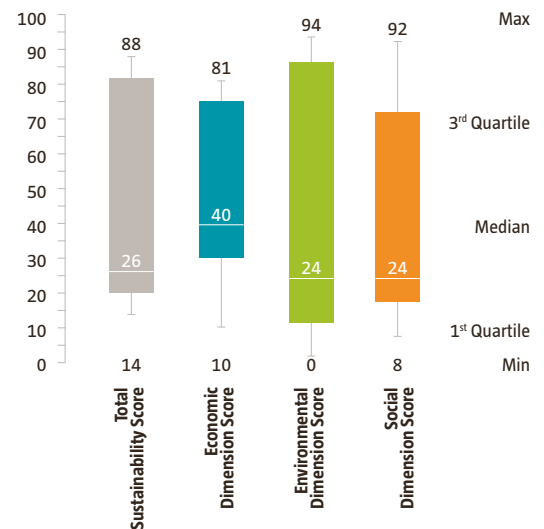
<b>SAM Gold Class</b> ●	
IRPC PCL *	Thailand
<b>SAM Silver Class</b> ●	
Thai Oil PCL	Thailand
SK Innovation Co Ltd	South Korea
<b>SAM Bronze Class</b> ●	
Neste Oyj	Finland
S-Oil Corp	South Korea

\* SAM Industry Mover

## Industry statistics

Number of companies in universe	32
Number of companies assessed in 2018	19
Assessed companies to total companies in universe	59%
Market of assessed companies to total market	75%

## Results at industry level



The box-and-whisker plot describes the distribution of scores in the industry, based on all assessed companies. More information is available in the Reading Instructions in the introduction.