Global Partners LP (GLP)

Crude Transportation

GLOBAL

What is Global's DNA – Sourcing, Logistics & Marketing

"Virtual Pipeline"

Gathering

Origin

Trucking, Pipeline,
Storage and Rail Loading

Transportation

Delivery

Rail, Barge, Ship,
Truck, Pipeline

Storage

Destination

Storage, Terminaling,
Throughput, Blending

Integrated Marketing

Wholesale Distribution

Retail/C-Store Operations

Vital Role in Energy Infrastructure

- **Recurring nature of our business**
  - 168 million bbls per year*
  - 990,000 automobile tanks of gas filled a day*
  - 19,000 diesel trucks fueled a day*
  - 46,000 homes a day of heating oil delivered in winter*

* TTM ended June 30, 2013

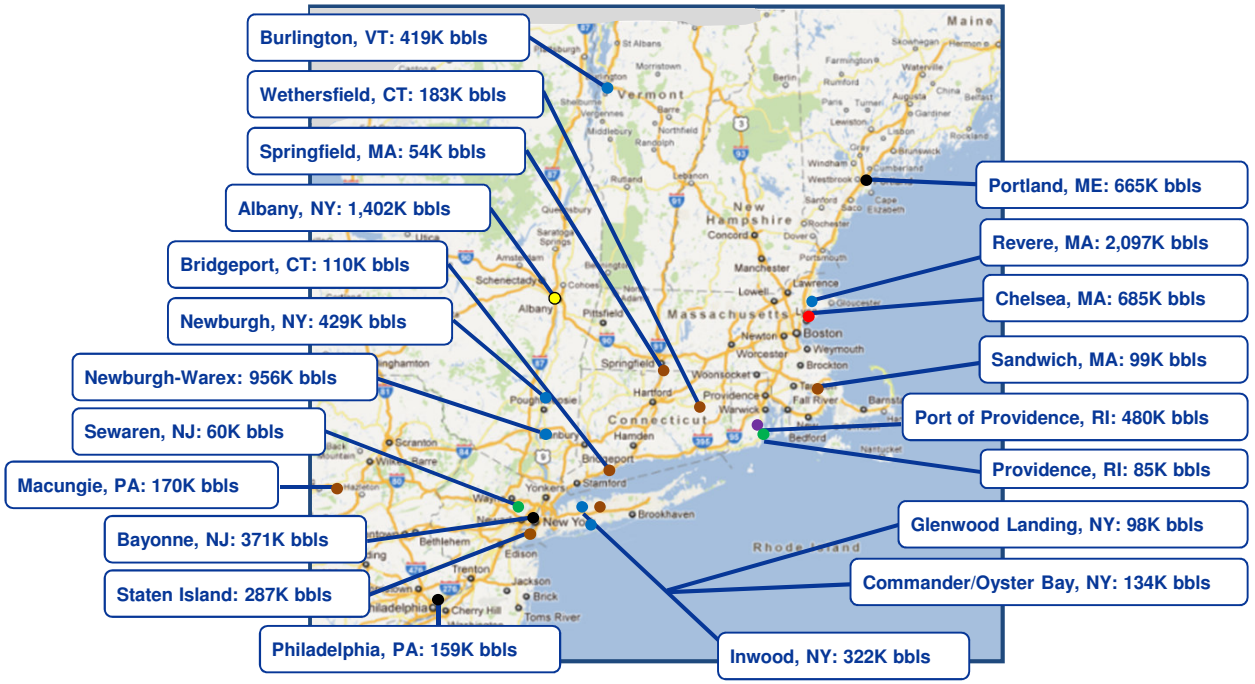
Long-standing customer relationships built on commitment to service excellence

Wholesale Terminals – Northeast

Global has 9.3 million bbls of terminal capacity in the Northeast

Key to Terminal Type

- Distillate
- Ethanol
- Gasoline/Distillate/Ethanol
- Residual/Distillate
- Residual/Distillate/Biofuel
- Distillate/Biofuel
- Gasoline/Distillate/Ethanol/Crude
- Crude



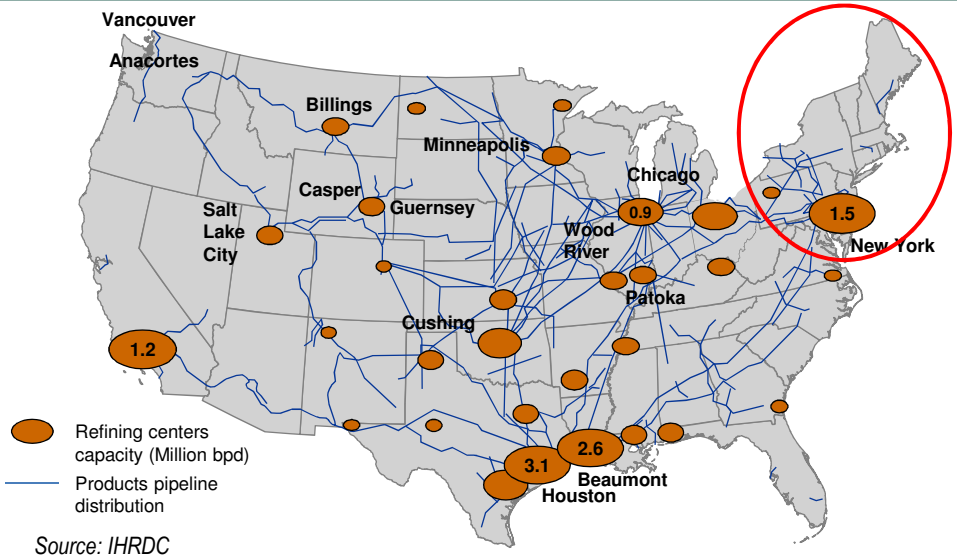
Estimated market share[1]

Location	Est. market capacity	GLP capacity	GLP % of total
Newburgh, NY	2,755	1,385	50%
Western Long Island, NY	769	554	72%
Boston Harbor, MA	9,774	2,782	28%
Vermont	430	419	97%
Providence, RI	4,455	565	13%
Albany/Rensselaer, NY	9,558	1,402	15%

[1] Based on terminal capacity (bbls in 000s)
Source: OPIS/Stalsby Petroleum Terminal Encyclopedia, 2013, various marketing materials and Company data

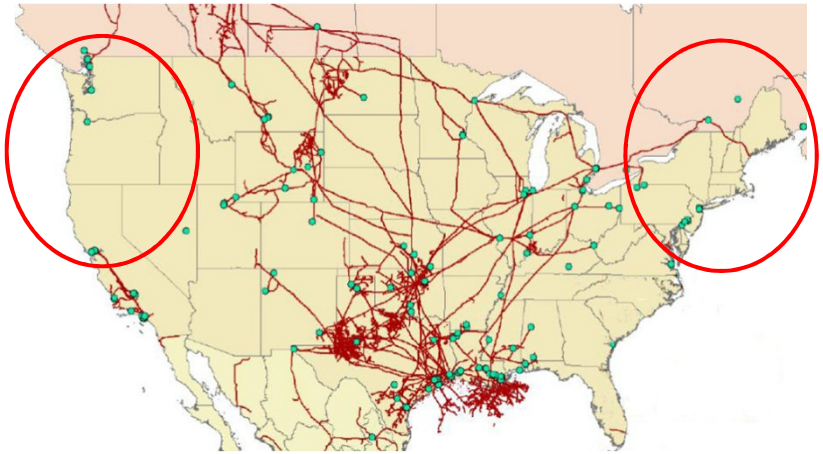
Wholesale Supply Infrastructure

Supply Infrastructure: Limited Product Pipelines in Northeast



Source: IHRDC

Limited Crude Pipelines to East and West Coasts



Source: Energy Policy Research Foundation Inc.

Logistical Advantages

High Barriers to Entry

The limited number of pipelines and refining capacity in the Northeast limits competition from other distribution networks/channels

Optimization and Efficiency

Our network of terminals is a gateway for the receipt, storage and distribution of refined petroleum products, renewable fuels and crude oil

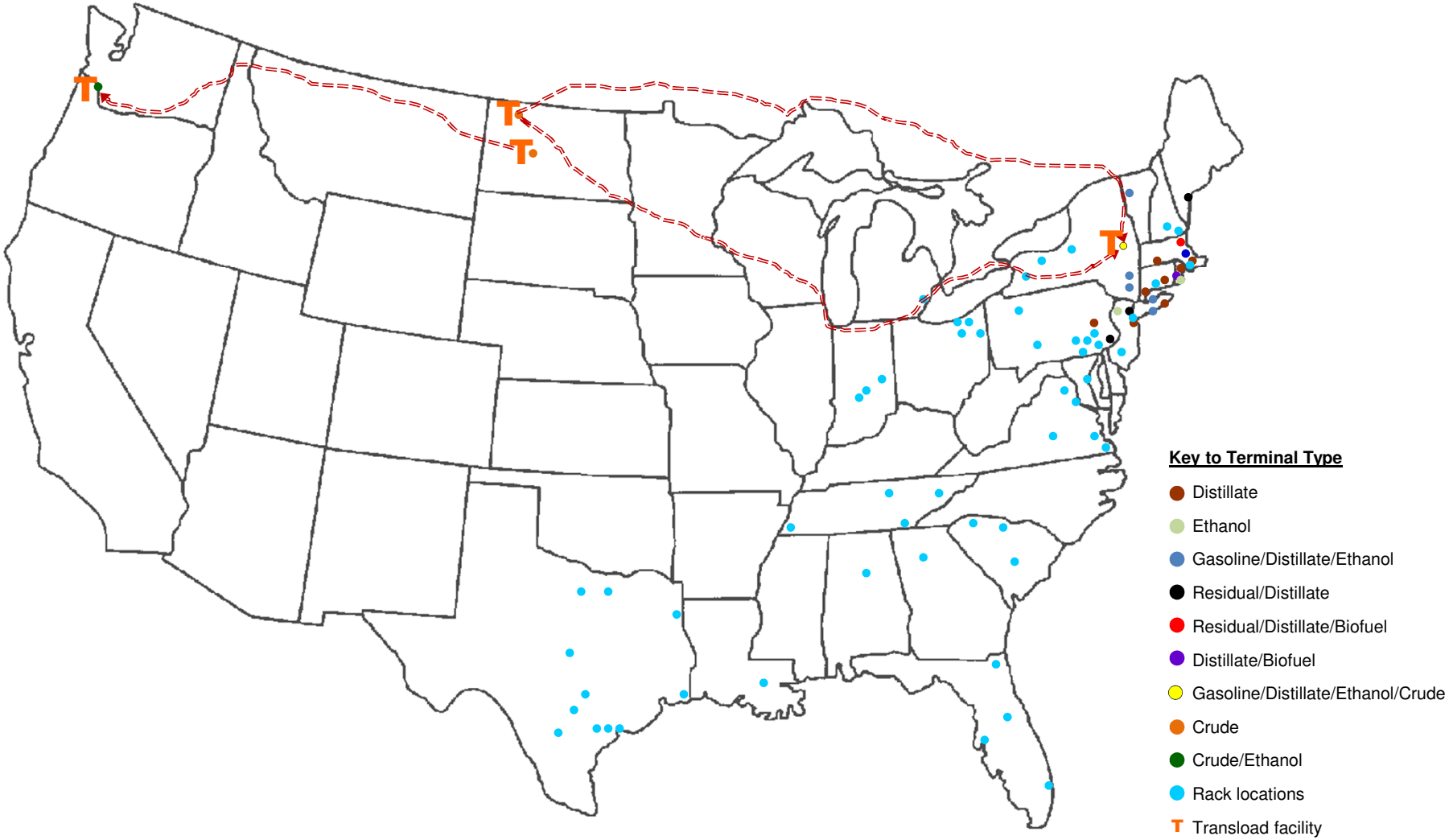
"Virtual Pipeline" Solution

Rail efficiency and optionality to East and West coasts are competitive logistical differentiators

Built-in Market Clearing

Strategically located, intermodal terminals provide an efficient and a cost-effective mechanism to move product in and out of our system

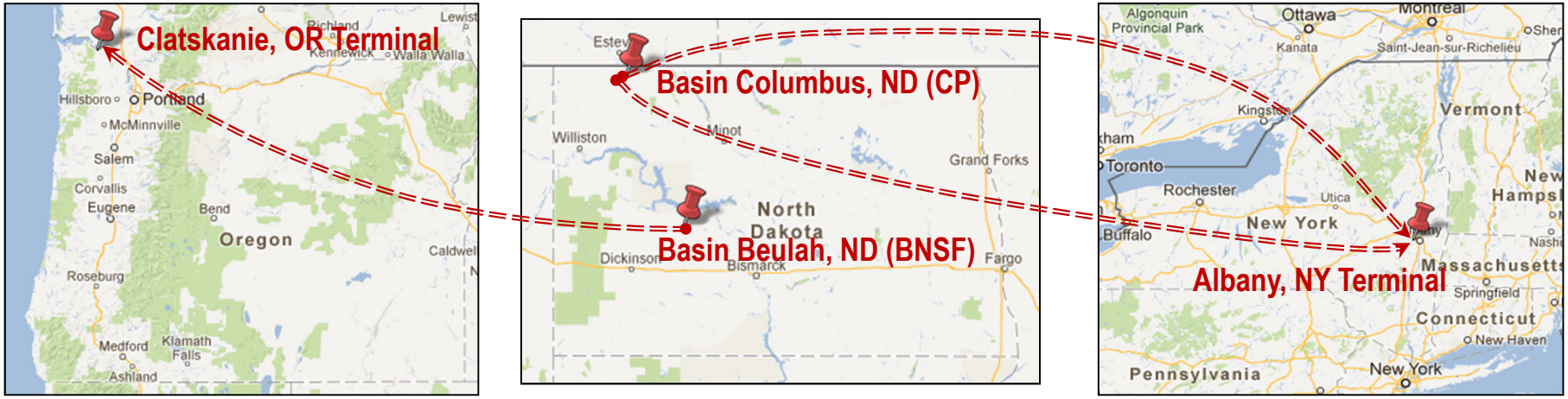
GLP's Primary Terminal Assets and Rack Locations



=== **Denotes CP and BNSF rail routes to GLP facilities**

Unique Origin-to-Destination Assets

Global Partners' Single Line Haul, East-West Infrastructure



Storage capacity = 200,000 barrels

Clatskanie, OR Terminal (BNSF)

- Serviced by the BNSF Railway through the Genesee & Wyoming short-line
- Deepwater marine terminal with access to 1,200-foot leased dock
- Situated along Columbia River
- Consists of crude transloading, ethanol production plant and storage

Combined rail loading capacity = 160,000 bpd

Basin Columbus, ND (CP)

- Economically advantaged single-line long-haul to Albany
- Global owns and operates a 100,000-barrel storage tank and truck offloading rack
- Connected facility to Tesoro Logistics' High Plains Pipeline System and expanding to 270,000 barrels of storage

Basin Beulah, ND (BNSF)

- Direct long-haul service to the West Coast and Gulf Coast
- Facility is being expanded to include two 140,000-barrel tanks and truck off-loading rack
- Expansion scheduled for completion by end of 2013

Rail off-loading capacity = 160,000 bpd

Albany, NY Terminal (CP)

- 1.4 million barrels of storage capacity
- Intermodal terminal linked via single-line haul to CP
- Enables offloading of two 120-car unit trains in a 24-hour period
- Averaging just 4 to 5 days one-way per train shipment
- Products shipped by barge from Albany to East Coast refiners

Well Positioned to Benefit From Increasing Oil Production in North America

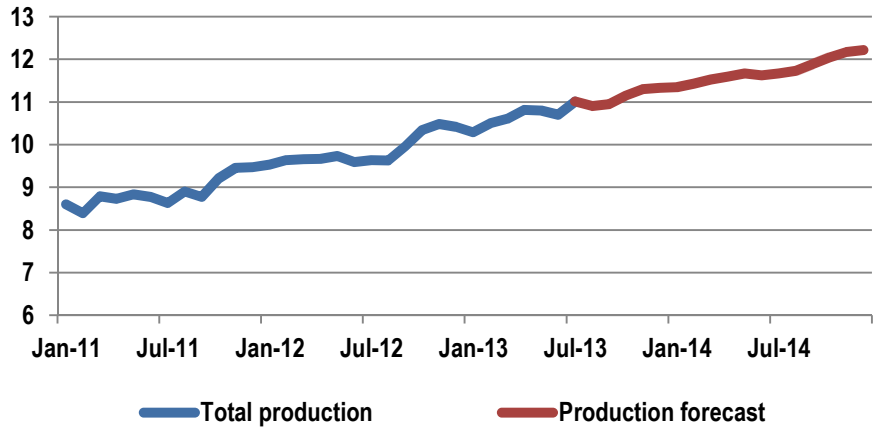
Refining capacity by region

Region	Refining Capacity (mmbpd)	Imported Crude (mmbpd)	Imports as a Percent of PADD
PADD I	**1.29**	**0.89**	**68.99%**
PADD II	3.77	1.63	43.35%
PADD III	9.09	3.96	43.51%
PADD IV	0.63	0.21	32.70%
PADD V	3.03	1.05	34.73%
Total	**17.81**	**7.74**	**43.45%**

Source: Bloomberg, EIA

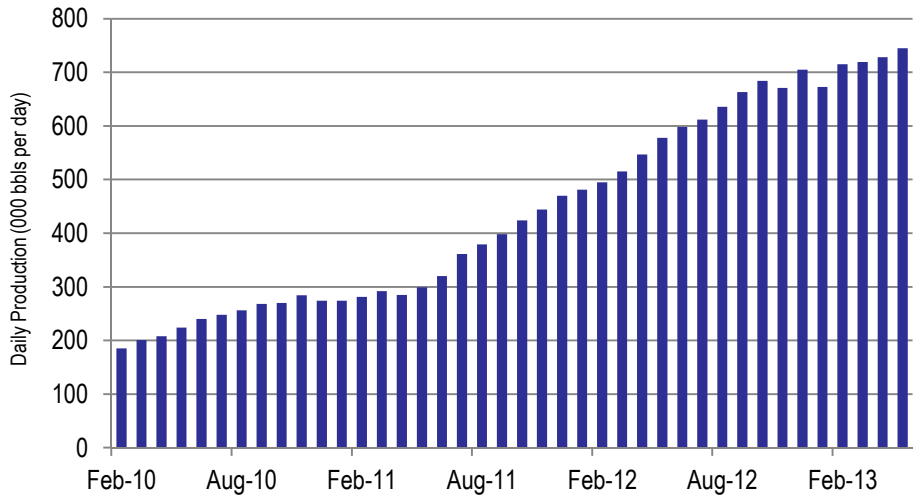
Global has the only single-line haul rail from the North Dakota Bakken region to the East and West coasts – a "Virtual Pipeline" –

U.S. Oil and Liquid Fuels Production (mm bpd)



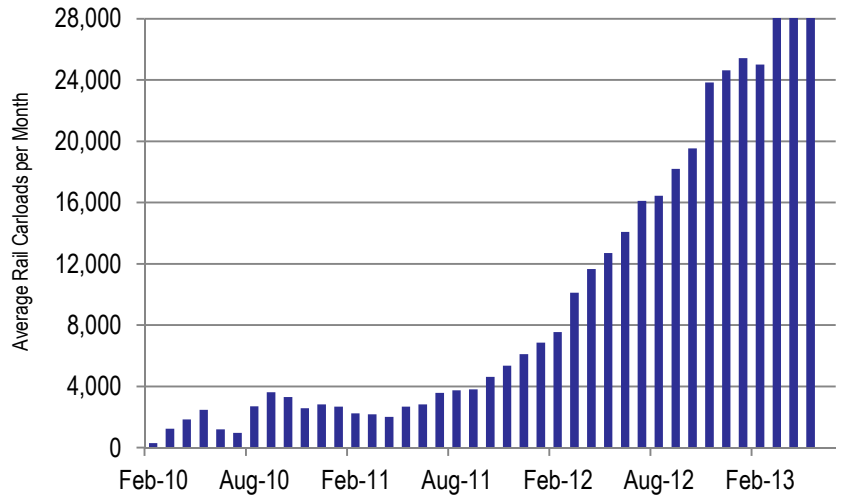
Source: U.S. Energy Information Administration

Growth in Bakken oil production



Source: North Dakota Pipeline Authority

Crude moved by rail from the Williston Basin



Source: North Dakota Pipeline Authority

Albany Propane Terminal

- Recently opened rail-fed propane storage and distribution terminal
- Can source advantaged propane directly from Midwest and Canadian sources via single line haul on Canadian Pacific
- Initial storage capacity of 540,000 gallons of propane; storage capacity can be doubled