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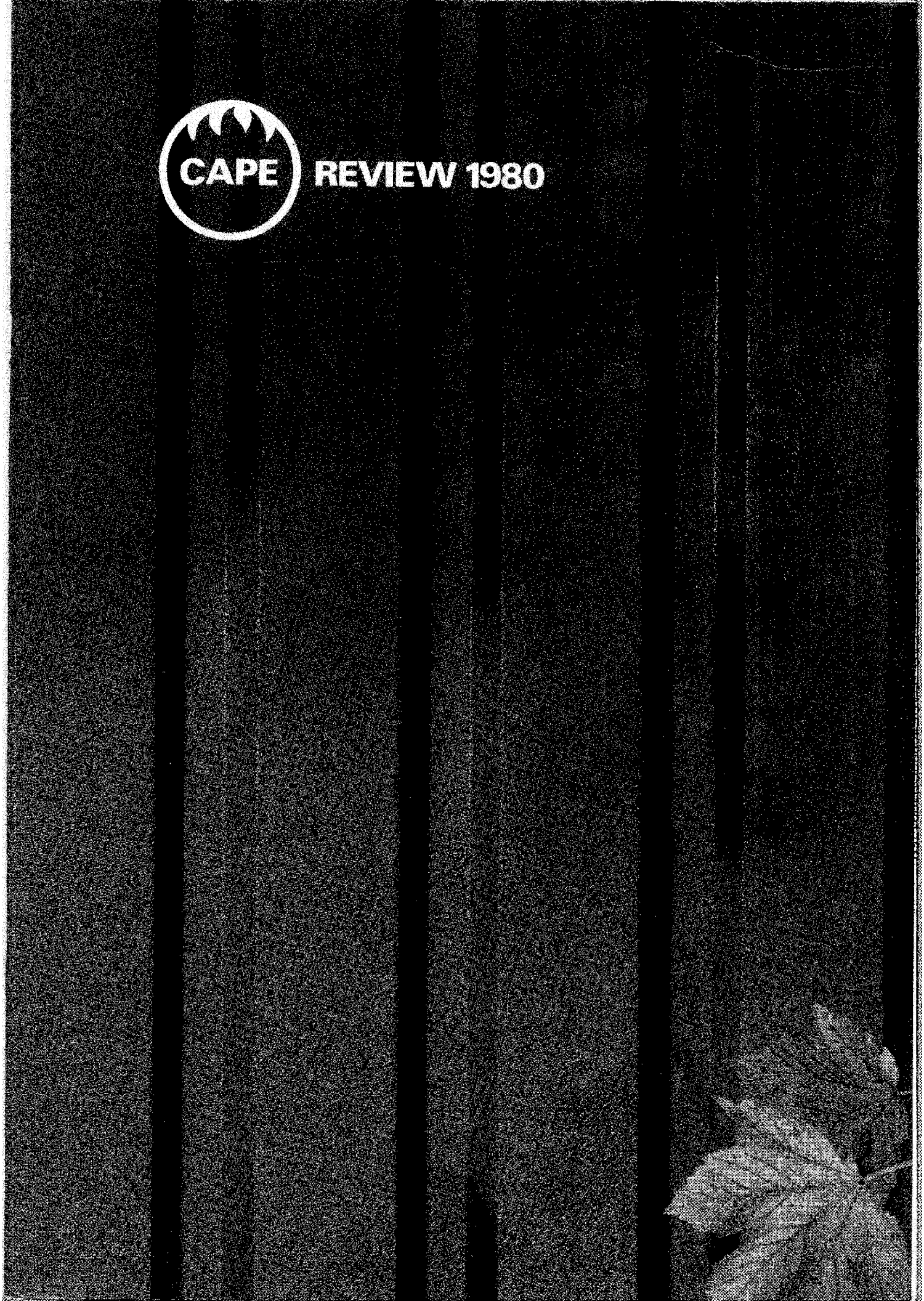
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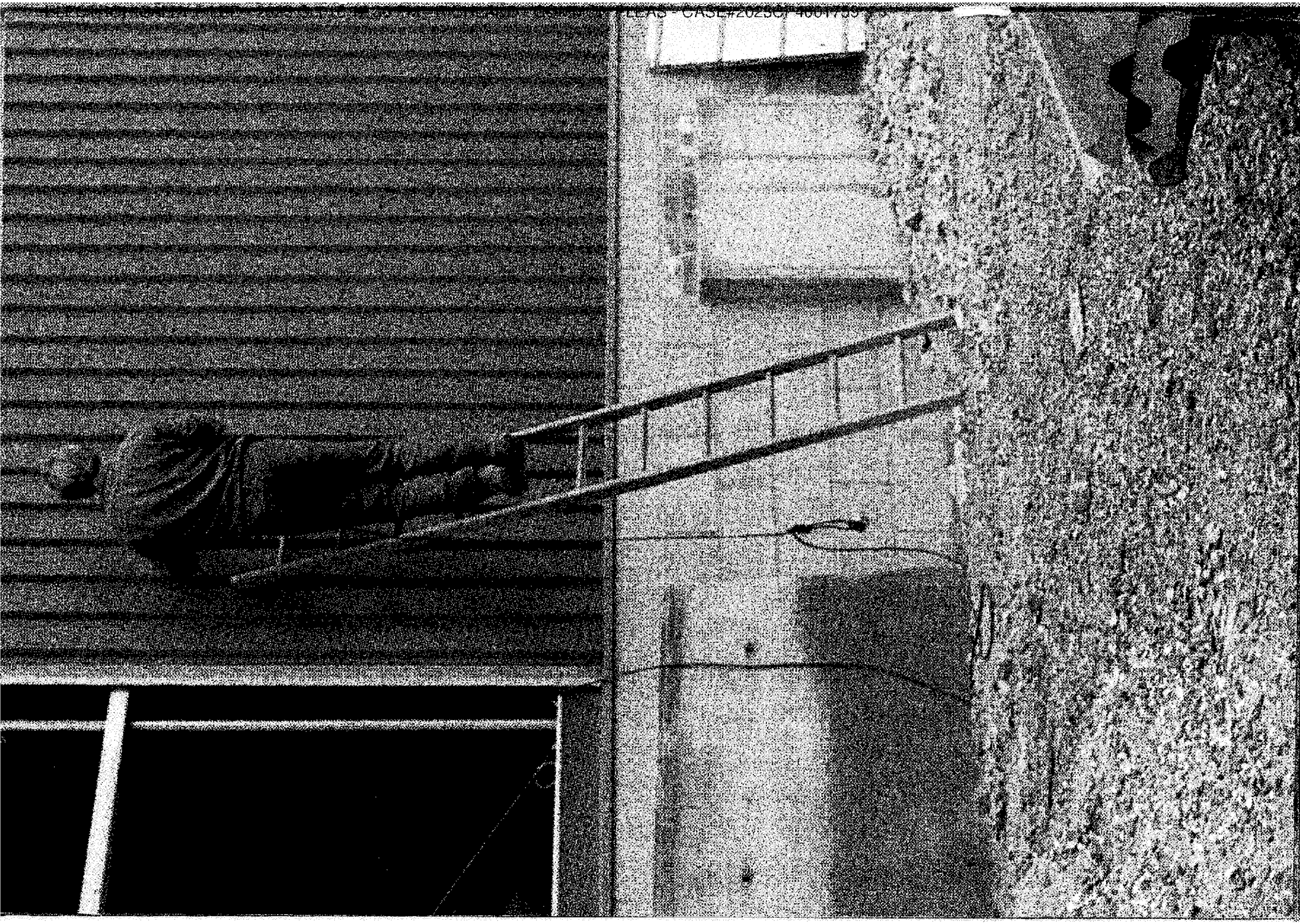
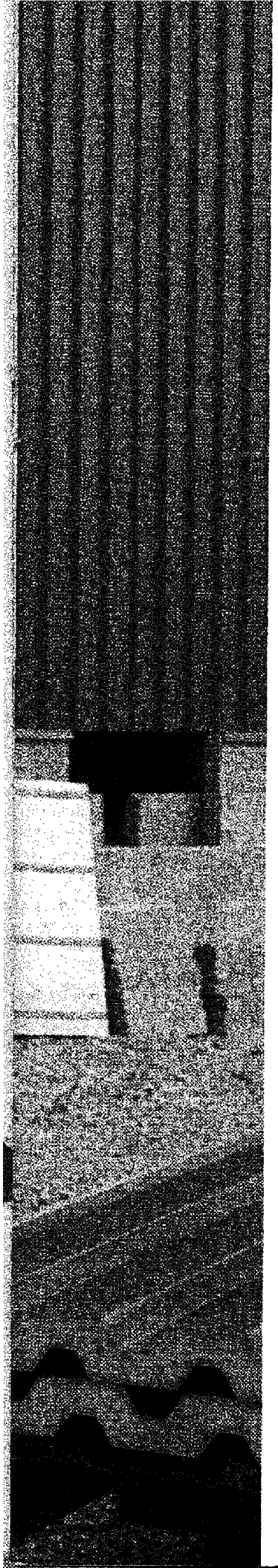




CAPE REVIEW 1980

CONTENTS

Cover picture:
Providing a rare combination of aesthetic appeal and high thermal efficiency is the new "Unishield" integrated composite cladding system manufactured by Cape Universal Claddings Limited.

Opposite:
This on-site picture illustrates clearly the metal/foam/metal composite construction of 'Unishield' insulating cladding panels.

Acknowledgements for co-operation and pictures are due to:

The British Petroleum Company Limited.

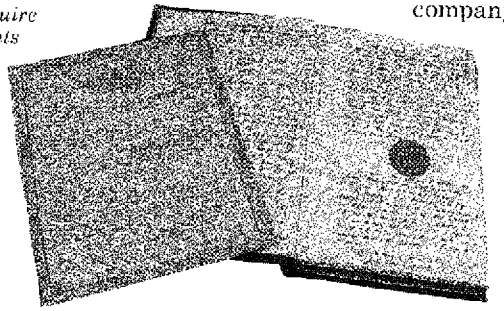
The Chloride Group.

Whence asbestos?

CAPE INDUSTRIES LIMITED

For Cape Industries 1979 saw a significant change in direction of the Group's traditional activities as a principal manufacturer of asbestos products and as a major world producer of asbestos fibre. Although over the past 10 years there has been a steady build-up of non-asbestos activities within the Group the ultimate change came on 29 June, 1979 with the announcement that the whole of Cape's asbestos mining interests in South Africa had been acquired by Transvaal Consolidated Land and Exploration Company Limited (a Barlow Rand company).

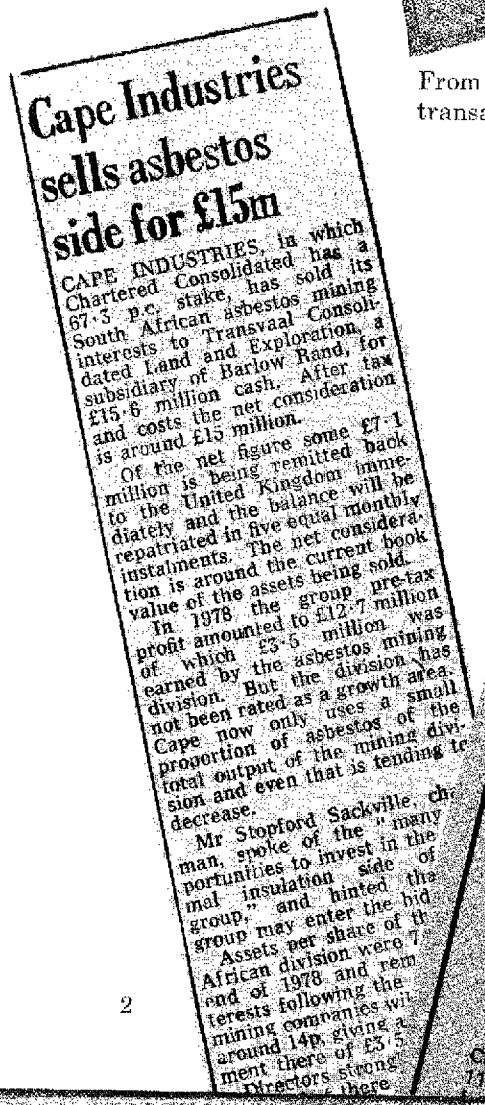
The Company was founded in London in 1893 to acquire the asbestos mineral rights of the Cape Mineral Syndicate. Shown are the Minutes of the Company's first Board Meeting and the Certificate of Incorporation.



From a historic viewpoint the transaction heralded the end of an era stretching over some 86 years during which time the Cape name had become synonymous with asbestos and, to a lesser extent with South Africa. Today, this is no longer the case. With the sale of the mines and expansion of activities elsewhere in the Group, together with new product development, less than 20% of Group trading profit is derived from asbestos related activities.

In stating these facts it is easy to appear dismissive of the long and fundamental role which asbestos has played not only in the growth and development of Cape but also in the provision of products and materials which have been essential to the convenience and safety of everyday life. It is also only through experience of asbestos that the science and technology of fire, heat and energy control has advanced and allowed, wherever practicable, the development of alternative materials to asbestos itself.

This has been the path followed by Cape as illustrated by the fact that compared with 1969 when some 14% of fibre



Cape Industries sells asbestos side for £15m

CAPE INDUSTRIES, in which Chartered Consolidated has a 67·3 p.c. stake, has sold its South African asbestos mining interests to Transvaal Consolidated Land and Exploration, a subsidiary of Barlow Rand, for £15·6 million cash. After tax and costs the net consideration is around £15 million.

Of the net figure some £7·1 million is being remitted back to the United Kingdom immediately and the balance will be repatriated in five equal monthly instalments. The net consideration is around the current book value of the assets being sold.

In 1978 the group pre-tax profit amounted to £12·7 million of which £3·5 million was earned by the asbestos mining division. But the division has not been rated as a growth area. Cape now only uses a small proportion of asbestos of the total output of the mining division and even that is tending to decrease.

Mr Stopford Sackville, chairman, spoke of the "many opportunities to invest in the mal insulation side of group," and hinted the group may enter the bid

Assets per share of th African division were 7 end of 1978 and rem terests following the mining companies wi around 14p, giving a ment there of £3·5

Directors strong there

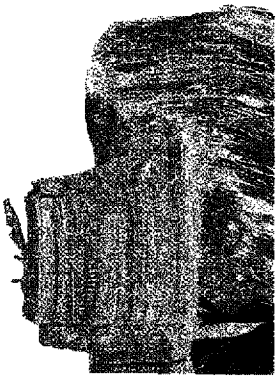
Cape Industries Limited
and
Transvaal Consolidated Land and Exploration Company Limited
(A Barlow Rand Company)

JOINT ANNOUNCEMENT

Cape Industries Limited (Cape) and Transvaal Consolidated Land and Exploration Company Limited (TCL) announce that negotiations are taking place which, if successful, will result in Cape's South African asbestos mining companies becoming wholly owned subsidiaries of TCL.

The proposed transaction is subject to approval by the appropriate authorities in the United Kingdom and South Africa. Shareh of both companies will be advised of developm next few weeks.

Cape Industries Limited
114 Park St



Examples of amphibole asbestos won from Cape mines now owned by TCL.

output from the Company's mines was redeployed for product manufacture within the Group, the figure by 1979 had fallen to an insignificant 1%. Underlining this dramatic fall is Cape's historic and predominant experience in the fields of thermal insulation and fire protection, both of which relied heavily upon the unique characteristics of amphibole asbestos, the mining of which Cape pioneered in South Africa in 1893.

Following the Second World War came rapid developments in the manufacture of man-made fibres such as glass and rock fibre. These new materials proved ideal for thermal insulation and Cape Insulation Limited became the first manufacturer of rock fibre (Rocksil) in the U.K. From the mid-1950s man-made mineral fibres steadily replaced asbestos for all thermal insulation requirements and by 1972 asbestos had been totally superseded. More recently, phenolic, polyurethane and polyisocyanurate foams are playing an increasingly important role for specialised insulation requirements.

Two years ago Cape was the world's leading producer of asbestos-based non-combustible boards and panels providing vital fire protection in buildings and ships. Today, this market dominance is still held but with a completely new range of asbestos-free products (see pages 4 & 5) for which world patents are held or pending. This particular fact serves to emphasise the Company's deep-rooted skills in research and materials technology.

Press announcements and comment relating to the sale of the mines to TCL on 29th June, 1979.

While it is clearly evident that Cape is no longer one of the asbestos "giants" there do remain within the Group two product sectors that are asbestos dependent; asbestos cement building materials and automotive friction materials. The substitution of asbestos in these sectors is still likely to take many years but under existing and proposed controls the manufacture and use of these materials present extremely low, if any, risks to health.

Over the past four years the health issues relating to asbestos have loomed large within the media and the public mind. Enough has already been said and written on the subject to excuse further comment here. The publication last October of the long-awaited Report and Recommendations of the Government-appointed Advisory Committee on Asbestos (The Simpson Committee) was welcomed throughout the industry and has helped to allay much of the concern that has been expressed. Although the Committee were unable to identify a quantitative risk to public health arising from asbestos there are expected to be a number of additional safeguards built into future legislation relating to the manufacture and use of asbestos products.

That Cape should have made such a dramatic move away from asbestos at this time is perhaps best explained by quoting Mr. Geoffrey Higham, Group Chief Executive, when summing up the Company's public evidence to the Simpson Committee in June 1976:

"*The object of our existence as Cape Industries is to make things and provide services that people want. We do not advocate asbestos dogmatically and are quite prepared to see asbestos disappear if other and better things come along*".

In the areas of thermal insulation and fire protection Cape has been able to achieve this objective and maximise upon its traditional skills. In the U.K. Cape is now the second largest producer of man-made insulation materials, though with a wider range than any other manufacturer; number one in the production of asbestos-free non-combustible building materials and the largest British company in the provision of thermal insulation contracting and services for industrial and domestic requirements.

Looking into the 1980s therefore Cape is set to make an ever-increasing contribution to energy conservation, the protection of life and property against fire and, through the continued and essential use of asbestos, the provision of safety critical automotive components for world markets.

New products – new markets

CAPE BOARDS & PANELS LIMITED

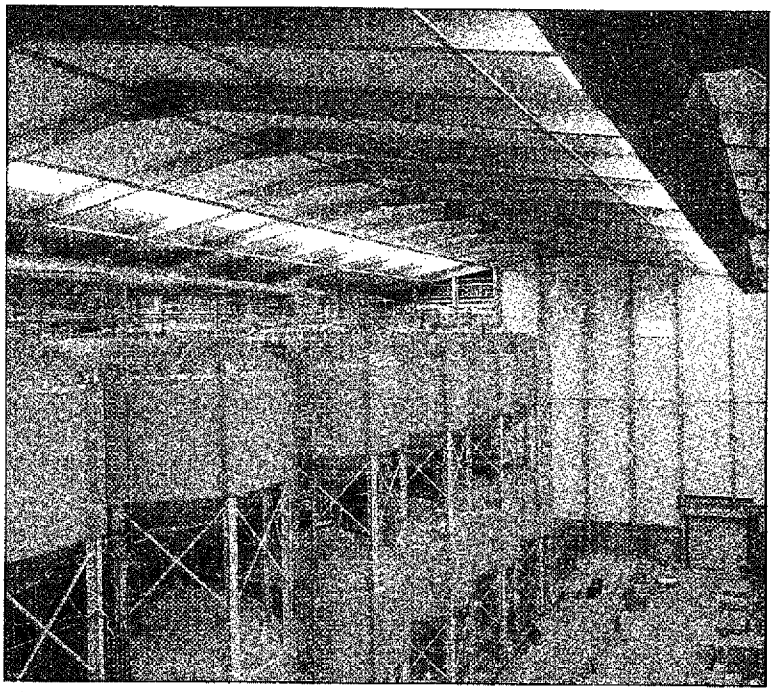
The one certain thing about manufacturing a range of products is that market requirements change continually and, to remain successful, a manufacturing company must anticipate not only the new requirements but also the time-scale in which to meet them.

This has been very much the experience of Cape Boards who, in less than four years has changed from a company producing two basic asbestos-containing building board products to become the world's leading manufacturer of alternative asbestos-free fire protection and insulation boards. This task has been achieved entirely through the company's own research and development effort and has resulted in a comprehensive range of products to meet the specific world-wide requirements of such diverse industries as construction, shipbuilding, heat processing and non-ferrous metal smelting.

Over many years, Cape Boards have earned the reputation in the U.K. as being "First for Fire Protection"; this reputation is now further enhanced through the introduction of high performance, asbestos-free products such as "Supalux", "Monolux" and "Vermiculux". These board products are based on formulations and manufacturing processes which provide them with unique characteristics of non-combustibility and heat resistance, strength, dimensional stability and the essential provision of up to four hours' fire protection to building structures and for safety of life at sea.

These already established products have now been added to by the introduction of "Masterboard", specially developed to meet market requirements for an economic, Class 0 multi-purpose building board which can be used throughout the building industry – from large contractors to the small builder and even DIY enthusiasts. With such a wide market the introduction of "Masterboard" called for extensive promotion outside the Company's more normal liaison with specifiers and architects. Within one year, however, "Masterboard" has become the established alternative to traditional

Cape "Monolux 40" fire resistant panels, veneered with Melamine, line a new passenger facility at Gatwick Airport.



Above:
Cape "Supalux" board, offering up to 4 hours fire protection and resistant to humid conditions, was specified in the construction of the new Northern Federation Brewery at Newcastle.

Right:
"Masterboard", Cape's new general purpose building board has received wide acclaim. It is here used to line a warehouse ceiling at Morgan Furniture, Southampton.

board products which have never been able to provide the combination of properties now available in one product.

New products for industrial uses have also been introduced. "Monolux" 500 is an asbestos-free monolithic board specially developed for use in the construction of heat processing plant and equipment with the ability to withstand continuous working temperatures up to 500°C. "Monal", another new development, is an asbestos-free material which can be machined into component shapes for use in the aluminium industry. This new product has already achieved international acclaim and is being used in smelting furnaces in the U.K., Europe and the United States.

This continuing development of a comprehensive range of products opens up many new market opportunities both at home and abroad. By example, technical sales visits have already been made to the Republic of China at the invitation of the shipbuilding industry which is aiming to meet international standards of fire protection in their existing and new tonnage.

Closer to home, Cape Boards have been forging much closer links with EEC countries by setting up three new subsidiary companies; Cape Boards France, Cape Boards Deutschland and Cape Boards Nederland. To ensure rapid market penetration the legislation in each country relating to fire protection in buildings had to be analysed and followed up with exhaustive product testing to prove compliance with respective regulations. Additionally, each company is staffed by nationals with expert knowledge relating to specifiers and major end-users in their own countries. In each case, comprehensive distributor networks have also been established to guarantee widespread product availability and prompt delivery.

The new European subsidiaries not only provide a full technical sales and marketing service within each country but are also geared to sell to national contractors engaged on overseas projects.

The quest for new products continues. Cape Boards is forever aware of the demands created by new technologies and new market needs which can differ not only within market sectors but between different countries. To remain successful the company must provide the solutions through new products, recommended construction methods, compliance with legislation, sales ability and customer service. It is these strengths that have carried Cape Boards into its present position which augurs well for the 1980s.

Efficiency of purpose

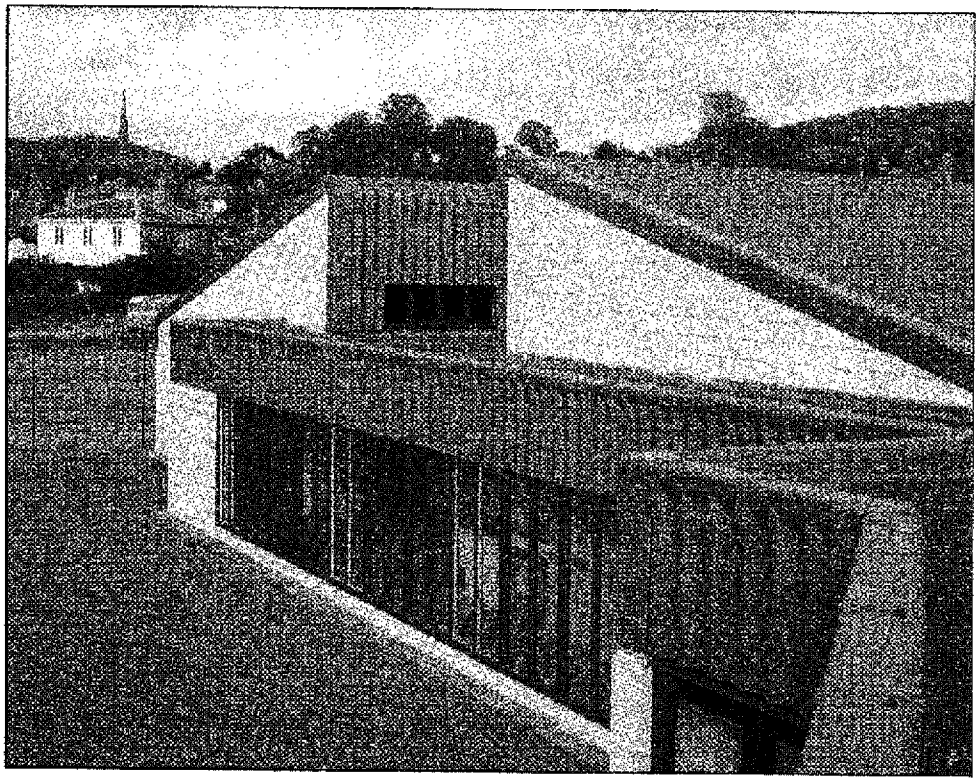
CAPE UNIVERSAL CLADDINGS LIMITED

The trend among contractors and the construction industry generally is to manufacture, or pre-assemble, as much as possible under controlled factory conditions thus leading to improved on-site efficiency. As regards lightweight claddings, this is exemplified by the success of Cape Universal's "Unisheld" metal/foam/metal composite panels. But there has also been a concurrent move towards "packaging" traditional cladding materials - asbestos cement, metal and plastic sheets – so that for any particular building, the required envelope can be delivered from a single source and complete to the last screw cap. Each of these developments has required considerable investment, carefully geared to a market where fluctuations are both cyclic and prone to sudden change.

The importance of metal

The "Unishield" range of single element metal/foam/metal composites, after prototype testing and development, was launched just over a year ago. It has since been specified on over 650 structures, both new buildings and those requiring refurbishment. It provides a simple, no-nonsense system of great strength, factory-assured insulation value, coupled with aesthetic appeal. The ICI polyisocyanurate foaming process has been adapted to produce in quantity, and to close tolerances, insulated panels in a choice of three profiles and a variety of colour finishes.

Cape Universal has at the same time increased its metal-rolling capacity to meet the growing demand for other coated steel and aluminium profiles, used in single or double-skin configurations. Weather-side profiles are now designated according to cover width and profile depth in millimetres: Cape 800/30, 850/20, and 950/40. All are available in sheet lengths up to 50 ft long (15 metres) or pre-cut to the required length. For the underside, interlocking metal lining trays are supplied for fitting under or over purlins. These are designed for packing with "Rocksil" or other insulating quilt, and are applied so that there are no visible fixings. Where ventilation is required in the vertical cladding, the company supplies purpose-



At the John Masefield High School, Ledbury, factory-painted "Monad" deep-profile asbestos cement sheeting incorporates a number of hand-made components to meet the design requirements of the Hereford & Worcester County Architect.

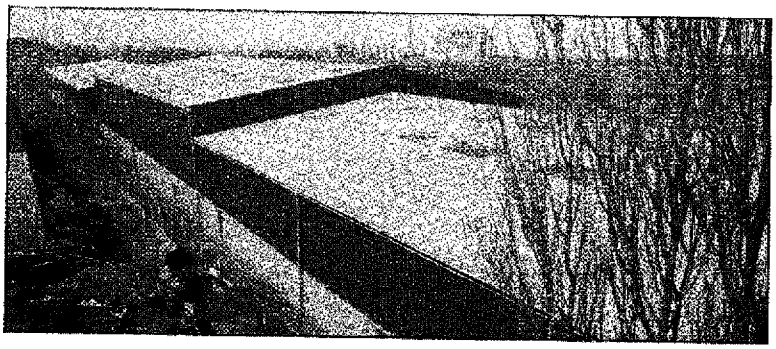
made louvres since air-handling and acoustic control of air flow are often important to cold stores and supermarkets in built-up areas.

Complementary lights

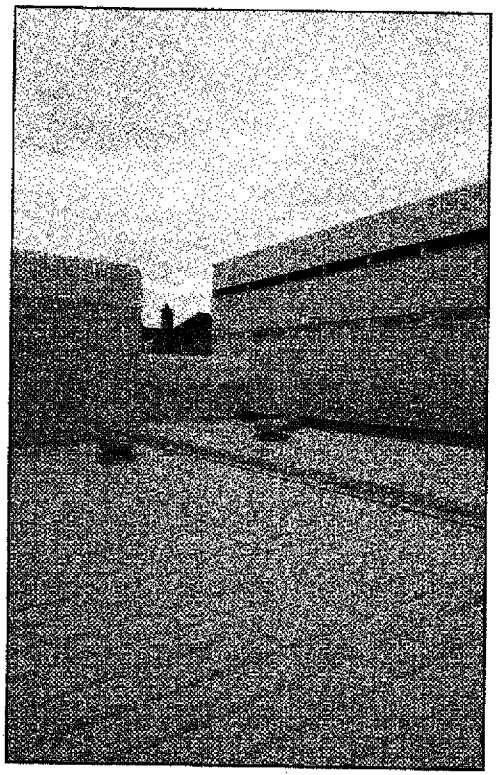
Where natural light is required either through the walls or through the roof, "Unilux" glass reinforced polyester (GRP) sheets present a cost-effective answer. They are fabricated to match all Cape metal and asbestos cement profiles, both in single-skin and double-skin configuration – the latter cutting thermal transmittance by approximately half. "Unilux" lights are also available in a large number of competitors' profiles, so that the company is in no way restricted to the market created by its own sheeting materials. GRP profiles are produced in three grades including Class 1 spread of flame and the double-skin fabrication can be factory-sealed or assembled on site.

A further development of the "Unilux" business is in horticulture, where glass or plastic film is not sufficiently robust for given circumstances.

Below:
A new factory for Multi Screw Parts (Coventry) Ltd. incorporating "Monad" asbestos cement roof with "Unilux" roof lights and "Unishield" 800 wall cladding.



Right:
"Unishield" metal/foam/ metal composite cladding has been used extensively at the North London works of Caxton Chocolate Co. Ltd.



Asbestos cement

The company's various profiles of asbestos cement sheeting have maintained their popularity and have retained their market share. Three reasons can be put forward. First, the availability of a baked-on range of acrylic colours is attractive to specifiers and local authorities, particularly those charged with a care for conservation and urban renewal. Second, the excellence of the company's hand-moulding capability, for producing curved eaves and quadrants to match the profile of flat sheets, is a skill which continues to commend itself to specifiers who require more than a box shape. Thirdly, to achieve the statutory insulation values now required, a new "595" Spacer System has been introduced to protect the sandwiched insulation quilt from compression, irrespective of the type of underlining or choice of supporting metal grid.

Control

As manufacturers of lightweight claddings (whether metal, plastic or reinforced cement sheets) Cape Universal is also very much concerned with control. The internal environment has to work well; the external appearance must look good; and the contractor's job should be made as straightforward and cost-efficient as possible. The company's investment programme is not therefore geared simply towards the development of new products but also toward the totality of their function, appearance and method of use; a policy which Cape Universal believes to be of immediate benefit to the construction industry and to the long-term future of the company.

Incentives for better insulation

CAPE INSULATION LIMITED

There must be few people in Britain who, over the past year, have not been encouraged by one exhortation or another to insulate their home, office or factory. Insulation is a major aspect of energy conservation and the continuing topicality of rising energy prices and reducing resources has ensured that interest in the subject has never been higher.

Busy as the insulation industry is however the power of exhortation is limited. Successive Governments have been forced to recognise that voluntary measures on energy conservation, even accepting the successes, have not been producing the required results. Consequently, the whole question of statutory regulations is again under review. Already, we have seen the introduction of new regulations for the insulation of new industrial buildings which became effective in June, 1979.

Incentives for higher insulation standards, alongside other measures designed to control energy consumption, have been many and varied. There are subsidies for surveys by energy consultants, in addition to which substantial sums have been made available to help industry and commerce to replace and modernise boiler systems; to improve the insulation of premises and to gain the benefits of combined heat and power systems. Cash has also been available for demonstrations to encourage the more widespread adoption of energy conservation technologies. A free national advice service has been available and there is a conditional aid scheme for selected industries. 100% first year tax allowances and regional development grants can also be obtained and there are useful reports emanating from the Industrial Energy Thrift Scheme, Industrial Energy Audit Scheme and the Energy Technology Support Unit. Grants and Government financed programmes to improve insulation levels in housing and public buildings are available and there is continuing pressure to educate industry and the public on energy conservation matters.

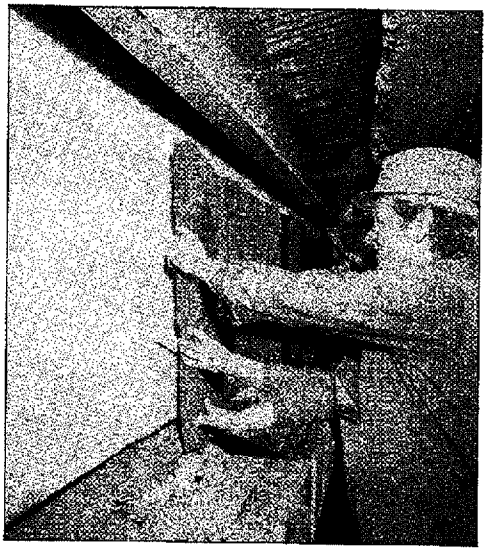
Although these measures have stimulated the demand for insulation it is generally agreed that energy savings to date should have been much greater and that existing insulation levels are too low.

This is especially true in housing where the present roof insulation standard applicable to new houses is 60 mm of mineral fibre while the Homes Insulation Act grant towards the cost of insulating an old uninsulated house allows for 80 mm.

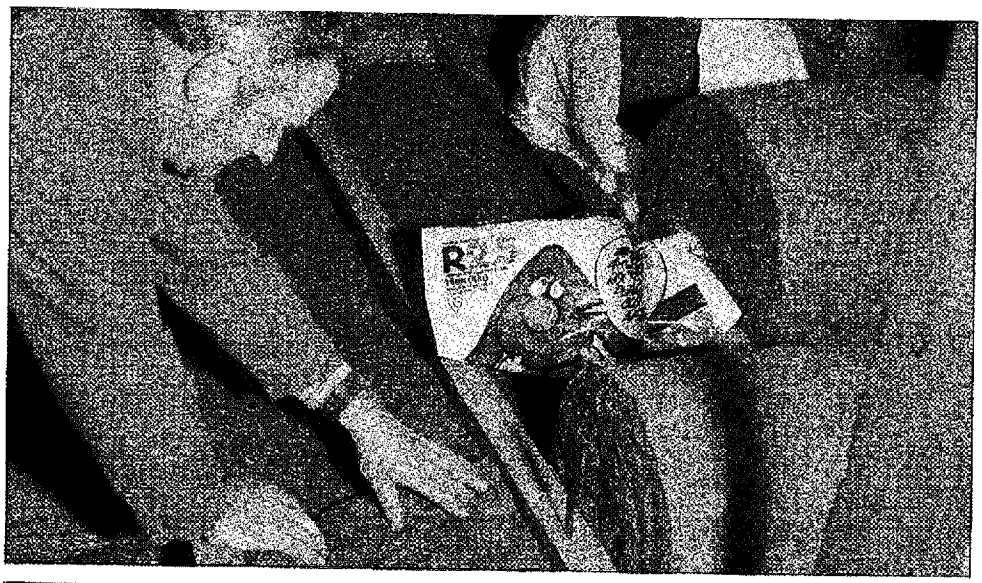
The materials used for these purposes are of the type produced by Cape Insulation as part of its "Housewarm"

Below right: "Rocksil" slab plays a vital role in the insulation of high temperature furnaces and kilns.

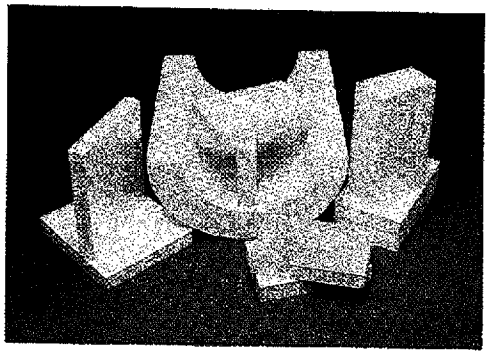
Below: "Rocksil" pipe sections, slabs and blankets are among the most widely used thermal insulation products manufactured by Cape Insulation.



Cape "Housewarm" loft insulation material was one of the first to carry the BSI Kitemark (BS 5803, Part 1: 1979) and to be included in the DoE list of approved materials under the Homes Insulation Act.



Cape "Phenexpan" phenolic foam insulation, suitable for temperatures down to minus 196°C, can be formed and cut to shape as required.



Home Insulation range and as "Rocksil" Building Mat, two of a remarkable number of building products manufactured by the company. Both "Housewarm" and "Rocksil" Building Mat were among the first products to bear the BSI Kitemark in connection with BS 5803 Part 1: 1979 and were included in the first Department of Environment list of approved materials for use in connection with the Homes Insulation Act. Despite the efficiency of these materials it is now considered that an 80 mm thickness is not enough. This point was illustrated in a report published as long ago as 1978 in which it was intimated that the economic thickness of mineral fibre insulation in new housing in 1985 is likely to be 180 mm in the roof, 125 mm in the walls and up to 80 mm in the floors. Although this is a far cry from present regulations and standards it clearly indicates the anticipated need for ever-increasing levels of insulation to stave off the worse effects of rising fuel prices and associated energy problems.

The national demand for insulation materials will continue to increase year on year and Cape Insulation has been gearing itself to the future through investing in greater production capacity and new product development. Although particular emphasis is placed on the development of the company's "Rocksil" rock fibre products, as manufactured at Stirling, other product ranges are also being boosted. At the Glenrothes plant production capacity for "Phenexpan", the company's unique phenolic foam material, has been increased and new markets are being developed at home and abroad.

The company's Queensferry factory (Clwyd), the only British plant producing wood fibre insulation board, is also sharing in the investment programme.

Cape Insulation is confident that it is now well placed to meet the immediate and longer term demand for insulation materials. This demand will undoubtedly accelerate with the serious efforts to increase standards of insulation designed to enable the country to bridge the energy gap.

The energy savers

CAPE INSULATION SERVICES LIMITED

As the country becomes increasingly energy conscious more and more property owners are looking to efficient insulation to reduce fuel bills. With savings of at least 25% in heating costs attainable, in most buildings, this demand is understandable and has resulted in the need for a comprehensive insulation service. To meet this need Cape Insulation Services Limited (CISL) is moving into the 1980s with a new streamlined operation.

This new operation, backed by 14 years of experience, comprises the former wall insulation company and its previous associate company, the loft insulation specialist, Pattison Insulations Ltd. The combined operation now offers a complete wall to roof insulation and draught-proofing service throughout the country.

Sixteen strategically located depots are now controlled by three regional offices, with management services provided by a professional team based in Watford. The reorganisation means a faster, more efficient response to all enquiries, whether for "Ufoam Plus" cavity wall insulation, "Rocksil" mineral fibre roof and wall linings, "Blofil" loft insulation, or the other products and services available.

CISL "Timberfil" insulation has been specially developed for timber-framed buildings.

The universal interest in energy saving has also played a role in bringing in new standards of materials and installation. For example, CISL played a major part in the introduction of the first British Standard for UF (Urea Formaldehyde) foam cavity wall insulation. One of CISL's directors chaired the BSI working party which formulated the two standards covering the specification and installation of the foam.

New building regulations requirements for insulation in walls also indicate the importance attached to energy saving. A "U" value (thermal transmittance factor) of 0.7 $W/m^2°C$ is now mandatory for all heated factories and more stringent insulating performance will probably also be required of houses in 1980 or 1981.

CISL's "Ufoam Plus" cavity wall insulation has made it possible for builders to meet these requirements without any design changes. Brick and block, used for cavity wall construction, when filled with "Ufoam Plus", will give better than the required "U" value and other lining systems bring similar benefits to buildings not suitable for cavity wall insulation. As low running costs are a desirable buying incentive, insulation is also helping builders sell new homes more quickly. The effectiveness of this solution to the energy crisis is well demonstrated by the extent of public sector buying of cavity wall insulation. Brighton, Chelmsford, Dunfermline, Redditch and Slough are some of the many local authorities that have specified "Ufoam Plus".

The PSA last year placed the biggest ever single nationally co-ordinated home-insulation project with one company, CISL. Valued at £4½m, it involved the insulation of 18,000 houses.

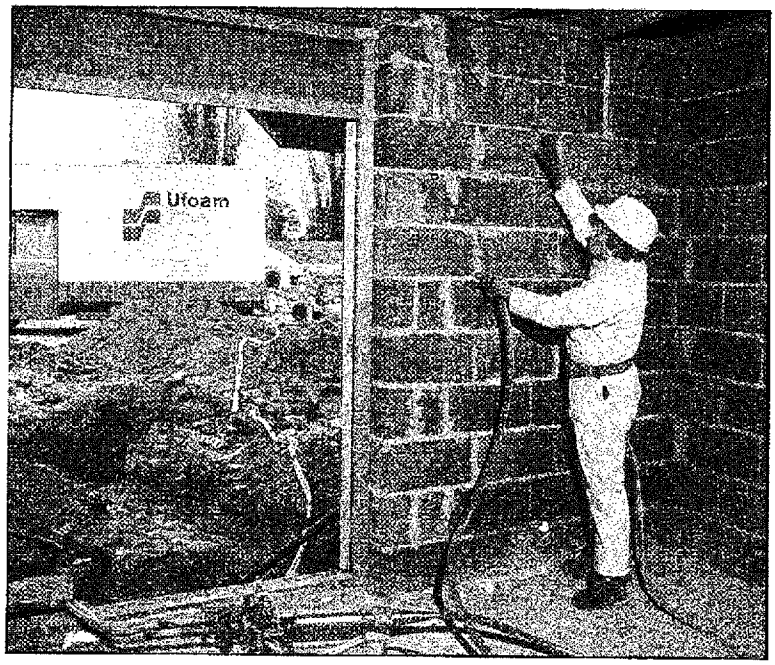
Timber-framed buildings are becoming more common and insulation of these structures bring equally impressive results. For example, filling the cavity of such a building with a 100 mm thickness of CISL's "Rocksil Timberfill" will give a thermal performance 70% better than that required by the building regulations.

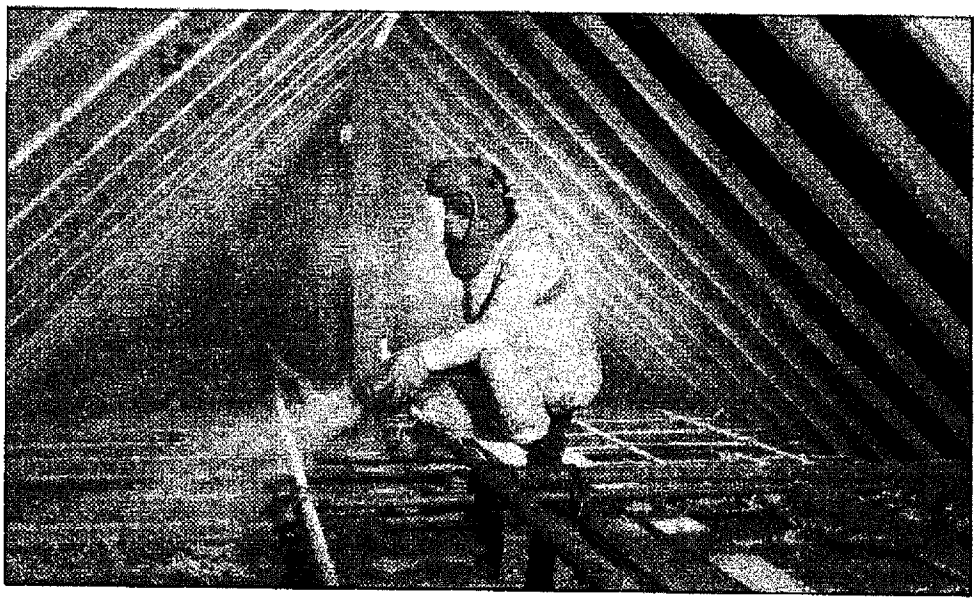
For loft insulation new materials are now on the market alongside traditional mat insulation. CISL has introduced "Blofil", a system which involves installing loose mineral fibre, blown by air pressure, into the gaps between the joists and the roof space.

In industry, making best use of available energy is equally important. The majority of factories in the U.K. have uninsulated roofs and walls. Recognising the potential savings, there have been Government grants of 25% towards the insulation of existing buildings and, with a capital allowance of 100% available, the savings of thermal insulation are brought well within the reach of the majority of managements. Once installed, factory insulation will pay for itself in energy savings, in as little as two years.

To meet the demand from industry, CISL has introduced a new factory lining system. The main system (alternatives are available) consists of a purpose-designed steel grid which is erected to support sheets of fibrous insulating material.

Cape Insulation Services is today the foremost company in providing for the insulation needs of all property owners, whether domestic, commercial or industrial. Although the company's expert advice is free the ultimate cost of ignoring it will always prove greater than specifying any one, or combination of, the services quoted for.





Above:
For new buildings "Ufoam Plus" cavity wall insulation is installed before plastering.

Right:
"Blofil", the new loft insulation system developed by CISL.

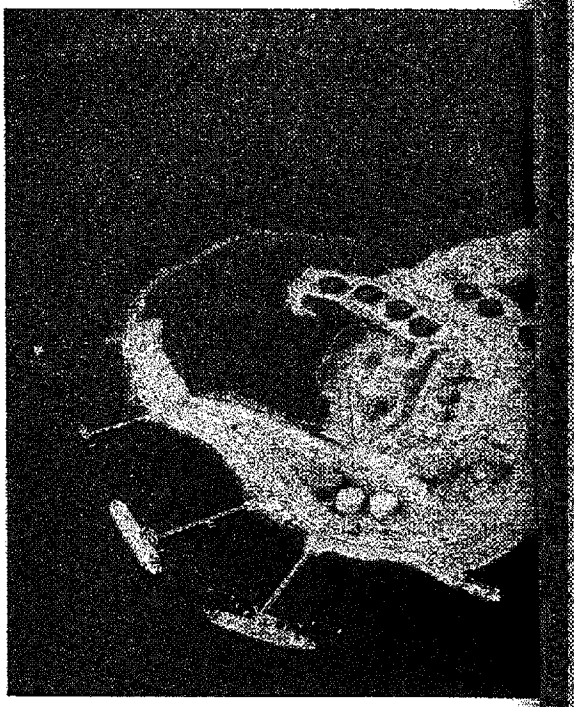
From Flotta to Sullom Voe

CAPE CONTRACTS LIMITED

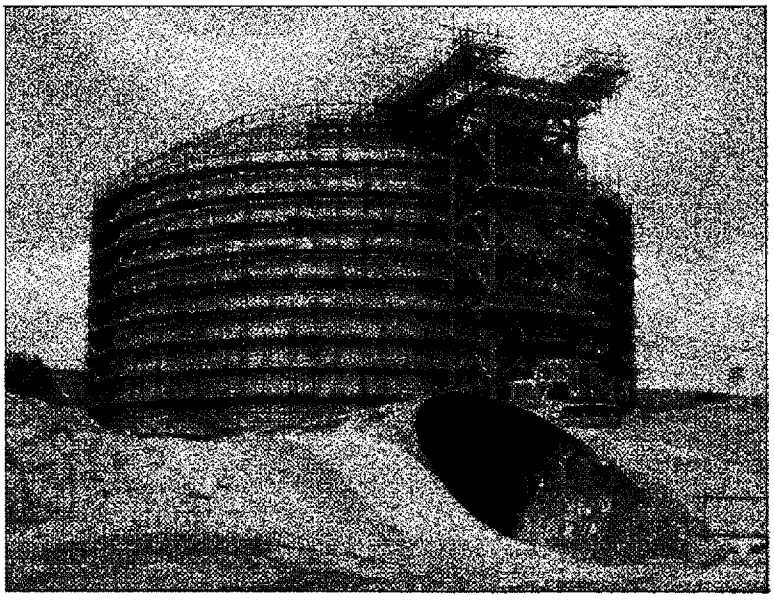
Cape's leading position in the manufacture of thermal insulation materials and the provision of insulation services is clearly indicated on other pages. For sheer scale of operation, however, Cape Contracts Ltd. is not only the largest employer within the Cape Industries Group but also the premier company in the U.K. servicing the insulation needs of the power, marine, heavy engineering, petrochemical and off-shore oil industries.

During 1979 the company was engaged on 2,300 separate contracts amongst which are major projects embracing breweries, power stations, nuclear submarines and numerous aspects of North Sea oil development, the most prominent of which are now concerned with on-shore oil terminals.

Having carried out thermal insulation to all process and cryogenic facilities at the Occidental Consortium's oil-handling terminal on Flotta, in the Orkneys, Cape Contracts is now engaged on similar work at the new Sullom Voe terminal in the Shetlands. This is the largest on-shore terminal yet to be constructed and serves the Ninian and Brent group oilfields in the East Shetland basin. The project is being carried out through the Sullom Voe Association Ltd. whose shareholding is split between 34 participating companies and the Shetland Islands Council. The estimated total cost of the project up to 1981 is £960m.



One of four 20,000 tonne capacity LPG tanks being insulated by Cape Contracts at Sullom Voe. Other work includes the insulation of process plant and some 50 miles of on-site pipework.



Terminal function

In simple terms, the various functions of the Terminal are to:

- ☐ Remove any water remaining in the oil received from the offshore fields via the Ninian and Brent pipelines.
- ☐ Extract that part of the oil which becomes gaseous at atmospheric pressure, thus making it safe to load onto tankers for shipment.
- ☐ Break down extracted gases into fractions, some being for use as fuel in the terminal power station, others being liquefied and stored.
- ☐ Store processed crude oil and liquefied gases pending shipment.
- ☐ Provide all other services necessary for the terminal's safe and clean operation.

As at other terminals, the dominant structures are the massive storage tanks for both crude oil and liquefied petroleum gases (LPG). At Sullom Voe there will be 12 crude storage tanks of 600,000 barrels (21 million gallons) capacity each and four insulated LPG storage tanks of 20,000 tonnes capacity each.

Aerial view of Sullom Voe terminal on Calbeck Ness, Shetland.

Insulated tankage
It is the insulation of the LPG tanks, two for Propane at minus 48°C and two for Butane at minus 9°C, that Cape Contracts is currently engaged on together with other plant and pipework insulation. The current contract value to the company is in excess of £6m.

The scale of the work involved may be judged by the fact that each LPG tank is 42 metres (138 ft) diameter and 26 metres (86 ft) high, requiring some 3,500 sq. metres (38,000 sq. ft) of insulation to each wall alone. Additionally, there is more than 50 miles of on-site pipework, of varying diameter, to be insulated.

Because of sometimes difficult weather conditions, which can delay the phased arrival of insulation materials, the company maintains a stock holding equivalent to 25% of total contract requirements. This has necessitated the on-site construction of a large pre-fabricated warehouse to store reserve supplies and daily scheduled requirements.

Off-site work
In addition to the enormous construction task under way at the Sullom Voe terminal much work is also being carried out for the project at a number of different fabrication yards around the country. Such work includes pre-fabricated pipework, process vessels and plant modules which have to be delivered and phased into the overall construction programme.

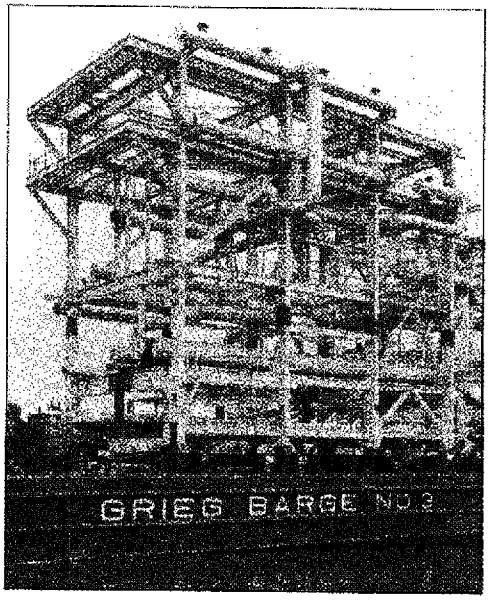
At four separate yards Cape Contracts is also involved in thermal insulation and fire protection work to P.A.U.s (pre-assembled units) and because of the wide geographical spread of this work it has proved advantageous to provide supervision from the company's various Regional Offices.

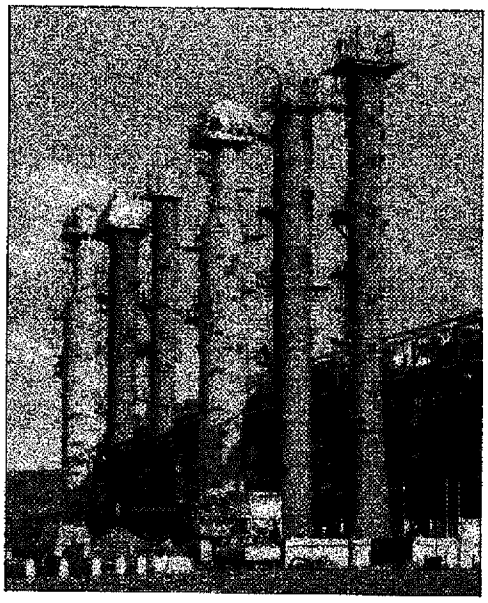
Benefit to Shetland
Although the Sullom Voe terminal is a partnership venture between the participating companies and the Shetland Islands Council the governing organisation is the non-profit-making Sullom Voe Association which itself appointed The British Petroleum Company, one of the participating companies, as the terminal's constructor and operator.

Of far-reaching importance to the Shetland community is the Sullom Voe Port and Harbour Agreement of 1978 whereby the Council will receive a levy on all oil shipped from the terminal. The accrued income is being held in a special fund to help local industries when, eventually, the flow of oil from the off-shore fields begins to run down.

Far right:
Fractionation columns at Sullom Voe prior to insulation by Cape Contracts.

Right:
A pre-assembled module for Sullom Voe constructed at the W.P.P.S. yard, Hawden-on-Tyne, for which Cape Contracts carried out all thermal insulation and fire protection.





New horizons overseas

CAPE CONTRACTS INTERNATIONAL LIMITED

For many years, Cape Insulation has been a major supplier and exporter of thermal insulation materials for overseas construction projects and particularly those undertaken by such leading British companies as Babcock & Wilcox, Clark Chapman and C. A. Parsons. The service provided for the shipping of materials and occasionally the presence of a supervisor to ensure correct usage. Most of this business came from areas of "British influence" such as Cyprus, Malta and Hong Kong, but as the oil-producing nations embarked on major industrialisation programmes, new markets began to develop in North Africa and the Middle East. At that time, Cape Contracts Limited recognised the potential and created an export division to cater for this expanding market.

At first, the division concentrated on merchandising and supplying complete insulation packages, but it soon became evident that there would be an even healthier demand for a first-class contracting service. The export division of Cape Contracts geared itself to supply this service and also to offer the complete technological and contracting resources available to Cape customers in the U.K.
This combination quickly brought success when the division won the fire protection contract for the Centre Pompidou in Paris, utilising the technology and research facilities of Cape Boards and Panels, materials from Cape Insulation and the contracting expertise of Cape Contracts.

By January 1976, the division had grown to such an extent that it was formed into a separate company, Cape Contracts International Limited. The new company has expanded significantly since its inception, continually adapting its approach to suit changing market conditions. There is now, for example, a successful joint venture in Kuwait, together with a jointly-owned company in Saudi Arabia and wholly-owned subsidiaries in France, Belgium and the Netherlands, as well as agencies in Qatar, the United Arab Emirates and Bahrain. More recently a new joint-venture has been formed in Argentina.

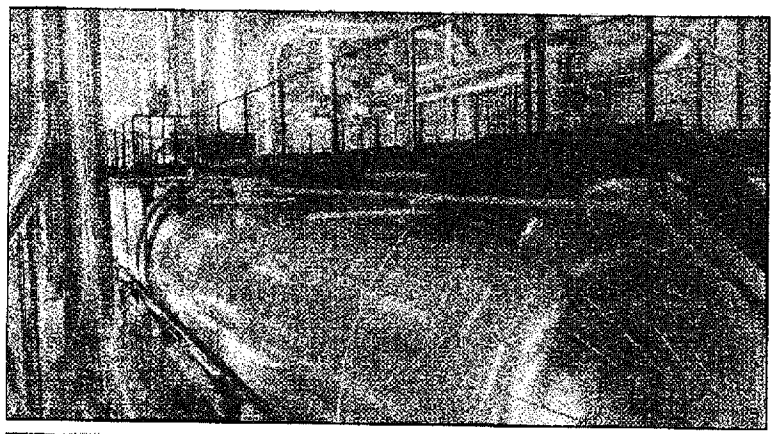
With such a broad base, and with all the contracting experience of the Cape companies in the U.K. on offer, Cape Contracts International is now fully equipped to win major overseas contracts. Throughout the world, oil refineries, gas treatment plants, power stations, de-salination plants and modern multi-storey office blocks and hotels all require highly sophisticated techniques in such fields as hot, cold and cryogenic insulation, fire protection and acoustic treatment. To meet this demand, Cape Contracts International offers a comprehensive service in design, manufacture, supply, shipping and installation to the most stringent specifications.

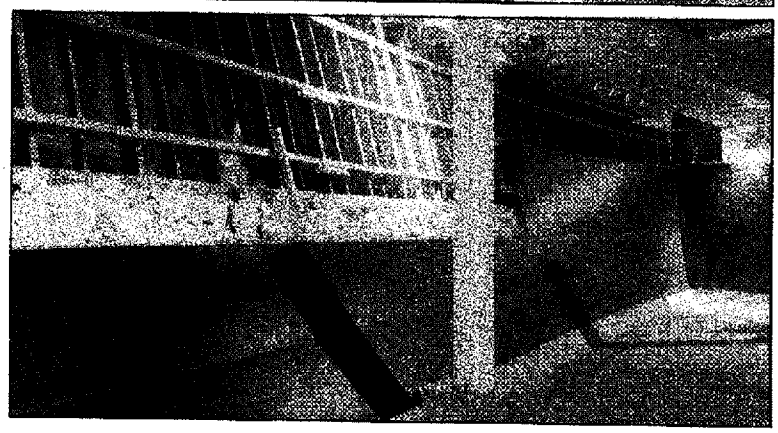
Cape Contracts International will undoubtedly continue to grow – with further expansion in Europe and the Middle East taking place alongside continuous exploration of markets in South America and the Far East.

Illustrated are typical projects for which Cape Contracts Nederland B.V. have carried out recent thermal insulation contracts:

Below:
A methanol plant at Dalfzyl.

Bottom:
Refrigerated cargo hold for new ship construction at Jonker and Stans shipyard.





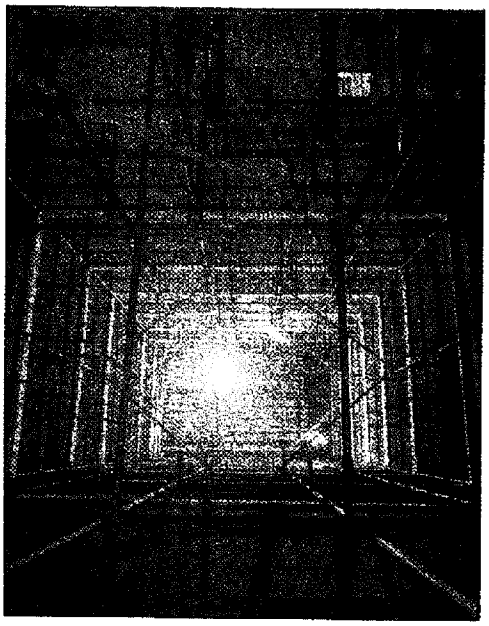
Scaffolding for industry

CAPE SCAFFOLDING LIMITED

Cape Scaffolding offers industry a complete contracting service providing management, operatives and materials for the design and erection of scaffolds for new construction work and maintenance purposes.

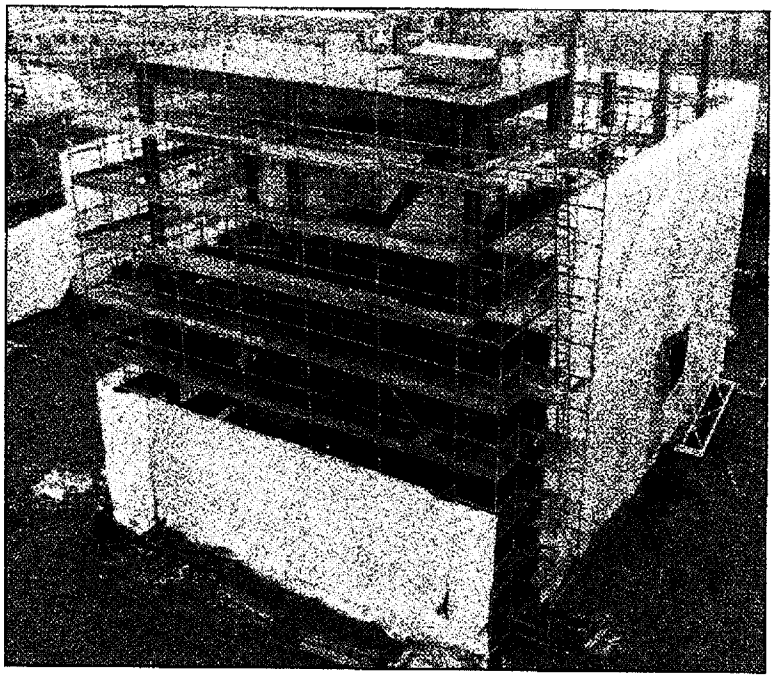
In the new construction field, the company's Billingham (Teesside) depot is currently providing fully covered temporary buildings for the construction of modules for the Sullom Voe oil terminal. These structures are used to overcome downtime caused by bad weather conditions during construction. For this purpose the company has erected a system scaffold featuring side walls sheeted in a polyester net fabric coated on both sides with flexible PVC. The roof is made from span beams clad with corrugated steel sheets designed to enable the entire roof to be lifted off the framework to facilitate the movement of materials in and out of the structure.

On the maintenance side, the Aberdeen and Askern (South Yorkshire) depots have both provided scaffolding and operatives for the maintenance of offshore platforms in the North Sea. One such recent contract was to provide access for shot blasters and painters working on the intermediate compression platform 110 miles out to sea between the "Frigg" field and the St. Fergus gas terminal. The scaffold access provided was to the underside of the main deck and helideck, the support legs and the complex manifold areas.



Top right:
Scaffold and platforms by Cape Scaffolding for boiler maintenance at CEGB Eggborough power station.

Below:
Weather protected scaffolding system by Cape Scaffolding for construction of plant modules by Redpath Dorman Long, Division of British Steel Corporation, Teeside.



Many contracts give the company's design team complex and unusual scaffold problems. A recent example was the construction of a high concrete slurry tower on a very exposed site at Houghton Main Colliery, near Barnsley. Scaffolding had to be erected in an accurate geometric pattern in order to engage with the pre-assembled conical formwork and support the 160-ton concrete loads, together with the imposed wind loading. The structure is 35 metres high at which point the structure splays out to an internal diameter of 12 metres at the top. This configuration, together with high wind velocities, posed a number of design problems and particularly in relation to maintaining fine dimensional tolerances and overall stability.

Cape Scaffolding has wide-ranging experience of industrial scaffolding projects and, with the added advantage of an in-house plant-hire division, the company is geared to provide a comprehensive scaffolding and plant-hire service to all sectors of industry.

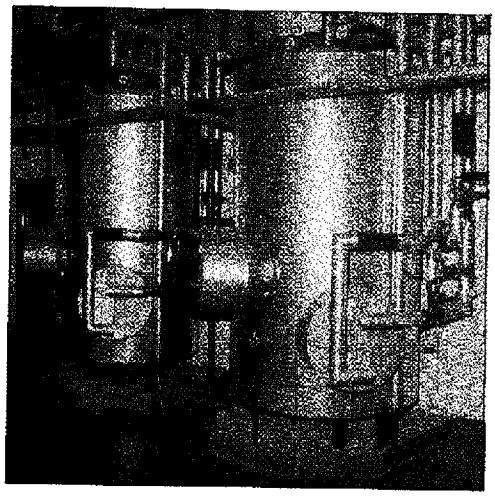
Preserving comfort and food

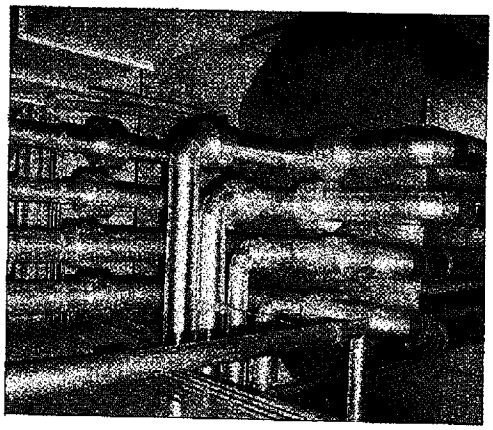
CAPE BUILDING SERVICES LIMITED

The activities of Cape Building Services are, in the main, concerned with preserving people's comfort and the food they eat. Through its Mechanical Services Division the company provides a thermal insulation contracting service to the heating, ventilation and air-conditioning industry, whilst its Cold Store Division constructs buildings for the refrigeration and preservation of perishable foodstuffs.

Mechanical Services Division

With the growing demand for comfort, environmental plant is becoming an increasingly vital element in the design and construction of buildings and appropriate insulation is therefore of paramount importance. Unless the right insulation materials and systems are used, expensive energy will be wasted and plant will not achieve its most economic performance. The life of the equipment will also be shortened if it is not properly protected.





Pipework, ducting and vessels in the plant room of a modern office block with stucco aluminium clad insulation by the Mechanical Services Division of Cape Building Services (CBS).

One problem has been a major headache to design engineers and insulation contractors for many years – how to maintain the integrity of the vapour barrier over conditioned-air ductwork. When chilled air is passed through a duct, condensation will quickly form on the cold surface of the metal and corrosion will set in. It is therefore imperative that a vapour barrier is fitted over the insulation to prevent the passage of humid air to the surface of the duct.

This impervious barrier is usually in the form of aluminium foil adhered to the basic insulant, or a material impregnated with a sealing agent. Where no further finish is required this will normally function well.

The real difficulty arises when the insulation has to be mechanically protected. This is usually in plant rooms or areas where services may be subject to damage and where sheet metal cladding is used. With traditional fixing methods there has always been a grave risk of rendering the vapour barrier ineffective due to *in-situ* drilling, or damage and, although many attempts have been made to solve the problem, it has persisted. Because most installations in the United Kingdom are governed by B.S.C.P. 3005: 1969, which does not permit the piercing of vapour seals, this has left designers and contractors with a permanent dilemma.

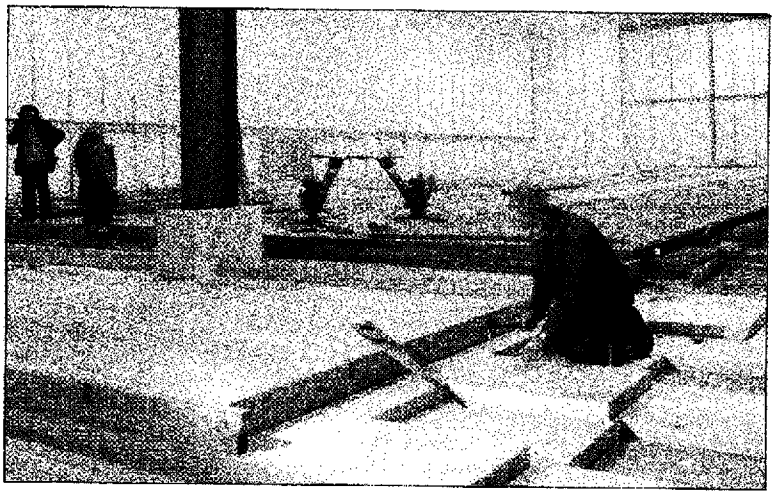
Capaclad

Cape Building Services have now solved the problem with the introduction of "Capaclad".

"Capaclad" is a new system of aluminium ductwork cladding which eliminates the risk of damaging the vapour barrier. Because the cladding panels are retained within a skilfully designed interlocking grid, they no longer have to be drilled and the barrier remains intact. Additionally, its ease of erection and clean finish gives "Capaclad" further advantages over traditional cladding.

Cold Store Division

Modern Cold Stores are constructed from prefabricated insulation panels



The CBS Cold Store Division manufactured and fixed all insulated roof and wall panels and laid the insulated floor (as shown) for the new 800,000 cu. ft cold store extension for Christian Salvesen at Droitwich.

which comprise an insulated core clad with an impermeable finish such as sheet steel or aluminium. The panels are secured to a steel structure to form an insulated enclosure, the size of which will range from a supermarket cold room to a bulk store of up to 60,000 cubic metres volume.

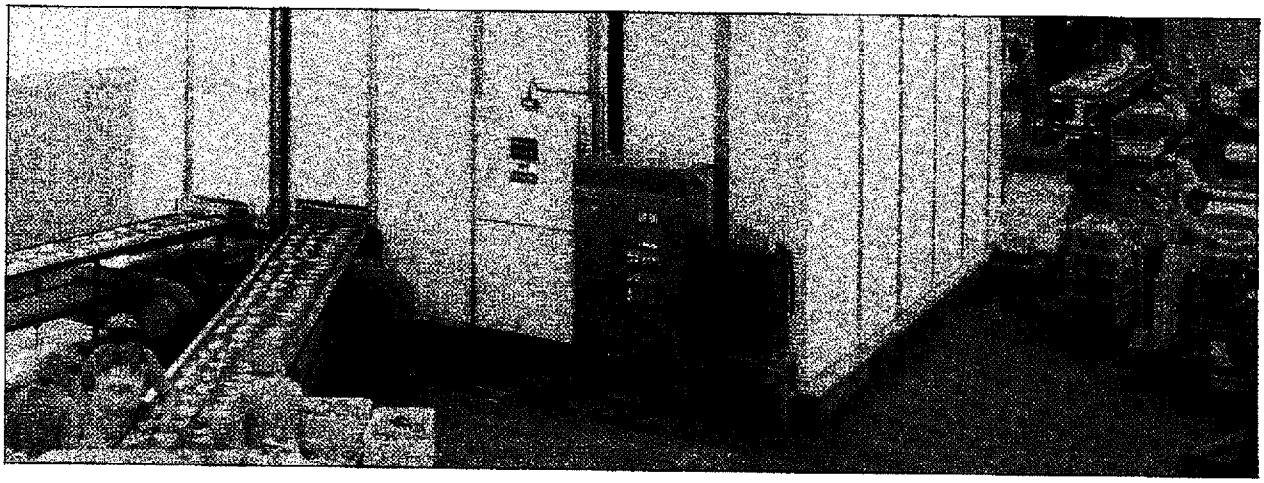
At the Division's Grimsby base, a wide range of insulated panel systems is produced with either polyurethane, polystyrene or "Phenexpan" as the foam core. These systems are available as products to other Contractors and are incorporated into complete "Design and Construct" Cold Store projects undertaken by the Division including all civil, structural and refrigeration work.

The Division's advanced polyurethane technology allows foaming between metal sheets to give a natural bond and a rigid panel which will span 6–8 metres in a ceiling or 16 metres in a wall position. Panels are also produced by laminating slab insulation to metal sheets using a spray applied adhesive. Cape's flexible approach to design problems and range of panels allows the company to offer the best system for a given application.

The success of any panel system relies on a thermally efficient and impervious method of jointing in order to provide a continuous vapour and insulation seal. Over a period of 10 years Cape have successfully employed their own patented foamed *in situ* jointing method. This incorporates heavy gauge clamping plates at the joint, connected by means of low conductive nylon couplings, with the cavity being foamed on completion of erection by a two-part foaming apparatus. Stores built with this system, in the U.K. and the Middle East, have shown remarkable performance in reliability and durability with no evidence of breakdown through joint failure. Other jointing systems employ the use of tongue and groove arrangements incorporating eccentric panel locks. This type of construction, which comprises panels with a returned metal edge, will satisfy prevailing EEC regulations for stores in the abattoir industry.

Whilst in the past the Division has concentrated mainly on Cold Store contracts, it is now involved in the complete design and construction of industrial buildings requiring high standards of thermal insulation.

An insulated blast freezer unit installed by the CBS Cold Store Division for Frigoscandia Contracting at Young's Seafood processing factory, Grimsby.



International by name and nature

DON INTERNATIONAL LIMITED

Despite the fact that U.K. vehicle manufacturers have been fighting against the tide of foreign competition and with contraction rather than expansion being the order of the day, certain sectors of the U.K. motor component industry on the other hand, have been steadily improving their position in world markets.

Sharing in this situation is the Don International group of friction material companies, one of the major world producers of automotive brake linings, disc brake pads and clutch facings.

The principal manufacturing companies are Don International at Manchester; Don International S.A. at Manage, Belgium; Don International (Pty) Benoni, South Africa, and Svenska Bromsbandsfabriken at Langsele, Sweden. In addition, there are wholly-owned marketing companies in France, Germany and Belgium and associated manufacturing companies in Spain, India, Malaysia and New Zealand. Licensing and manufacturing agreements also exist elsewhere overseas, the most notable of which are those operating in Japan, Italy, Brazil, Hungary and Yugoslavia. This spread of interests means that Don products are today marketed in over 80 overseas countries and manufactured in 20.

Central to Don's growth in European and overseas markets is the company's Research and Development Division, at Manchester, which is engaged in the constant formulation and testing of new materials to meet the multitude of international design and safety requirements. Every country and vehicle manufacturer presents different regulations and specifications, in addition to which there is the need for Don itself to keep ahead in basic research, materials technology and production processes.

The European Potential

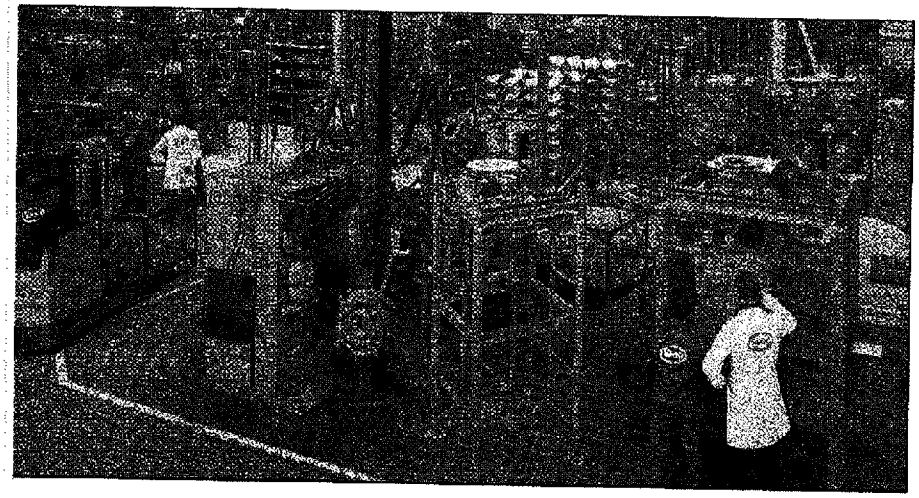
Traditionally, the bulk of Don business was geared to the U.K. original equipment and replacement market but in the early 1960s it became increasingly obvious that the potential for new business lay in the burgeoning European market for both replacement and original equipment friction materials.

Most of the major motor manufacturers were then investing heavily in new European production centres with Ford Motors leading the way by opening a massive new plant in Germany. This led to the first big contract for Don original equipment brake pads and linings being awarded by Ford for its range of Taunus and Cortina cars.

With other manufacturers such as General Motors and Chrysler (now Talbot) quickly following suit, the European potential for O.E. sales became such that Don made its own investment in Continental Europe by establishing Don International S.A.

Below:
General view of a production area at the Manage factory of Don International S.A., Belgium.

Below right:
Final pre-despatch inspection of vehicle brake linings at Don International S.A., Belgium.



(DISA) and the opening in 1966, of a new factory at Manage, Belgium.

Having become a major supplier to the European arms of the big U.S. motor groups, DISA went on to gain valuable business from all sectors of the European motor industry and an attendant share of the increasing replacement market. Don products are now supplied direct from Manage to such famous names as Audi-Volkswagen, Daimler-Benz, Ford, Peugeot, Renault and to heavy commercial vehicle manufacturers such as M.A.N., Saviem and Iveco.

The European car industry is still in a period of growth which augurs well for Don's established presence. It is predicted that the level of European car production running currently at 11.1m will climb through 12.3m by 1981, 13.0m in 1983 and reach 13.7m by 1984.

Sharing in this expanding market and that of Scandinavia is Svenska Bromsbandsfabriken of Langsele, Sweden. From its new ultra-modern factory this company now supplies some 35% of the total available market in Sweden, including a major share of the important OE supplies to Volvo and Scania Vabis. Valuable business is also being developed in neighbouring countries. Eastern Europe too is a market of growing importance as instanced by the recent Don Licensing agreements in Hungary and Yugoslavia.

The Americas

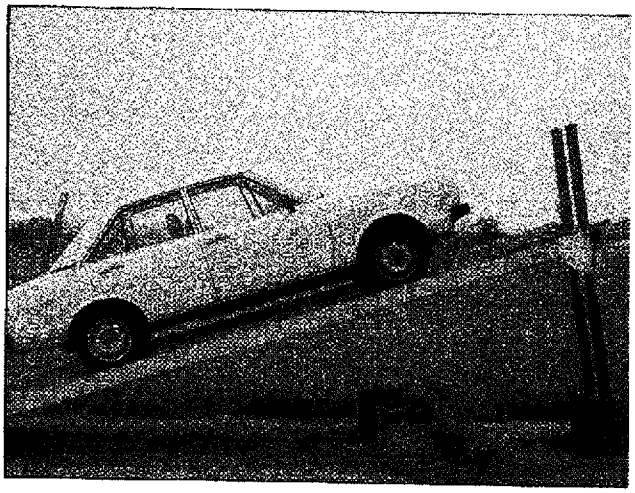
Don International is also making its presence felt across the North and South Atlantic. Because of the mounting fuel crisis in the U.S.A. the size and weight of new vehicles is being drastically reduced. This is creating a new and exciting market for Don where its wealth of experience in producing friction materials for "European" size cars is being exploited.

In South America Don has recently negotiated a manufacturing licence agreement with Fras-le S.A., of Caxias do Sul, Brazil, one of the largest friction material manufacturers in Latin America. This venture, which is Don's eighteenth overseas licensing agreement, comes at a critical time in the development of the automotive industry in Brazil.

Many companies such as Fiat, Ford, Volkswagen, Volvo and Mercedes have already or are about to set up plants in Brazil. There is thus an urgent requirement to provide national facilities with the European or American technology necessary to produce friction materials to a standard compatible with the specifications of the vehicles being assembled. Another example of how Don International's world-wide experience and capability is contributing to the overall strength of the British motor component industry.

Below:
A line of curing presses for commercial vehicle brake materials at the SBF factory, Langsele, Sweden.

Below right:
An adjustable gradient for testing handbrake efficiency at Don International's proving ground in Shropshire.



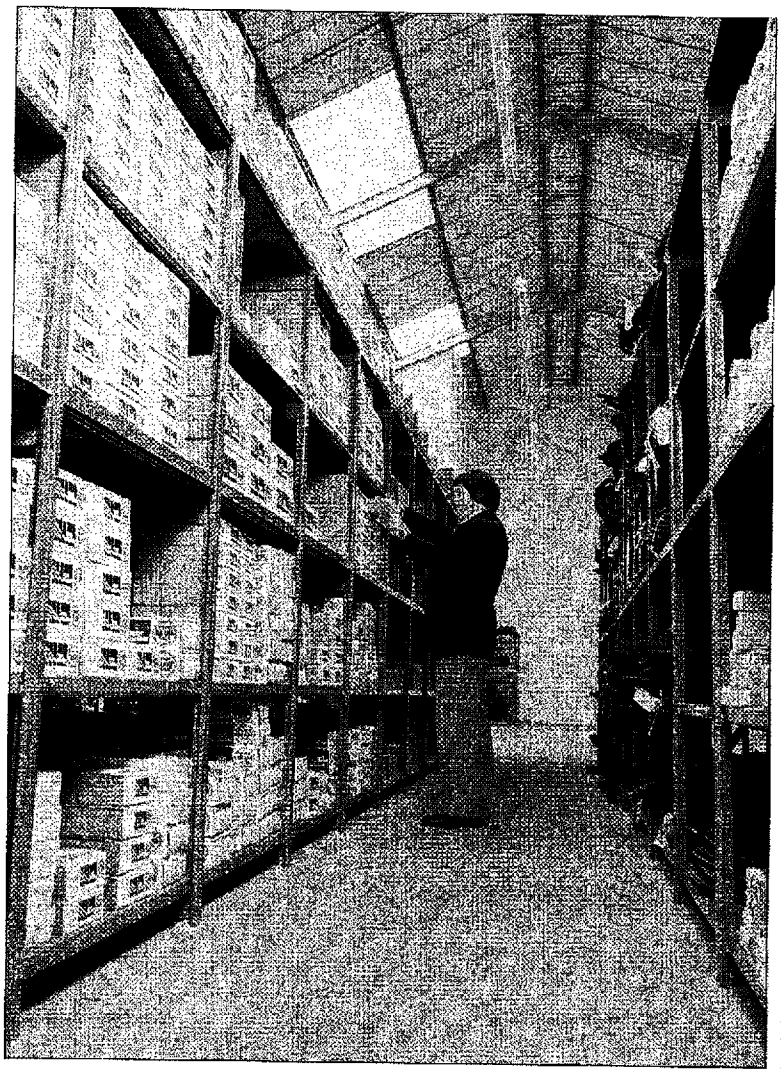
Reorganisation – Bristol fashion

TRIST, DRAPER LIMITED

For the Trist, Draper group of companies 1979 was a year of reorganisation designed to allow for greater specialisation and development of the group's various industrial products and services.

Recent changes in company structure have been accompanied by the introduction of a new "image", while the company's presence in the market place has been strengthened through the establishment of two new subsidiary companies, T.B.L. Limited and Lubefriction Limited. These new companies now embrace Trist, Draper's long-standing development and production of railway brake blocks for home and overseas railways, and the specialised production of automatic transmission components.

Stock shelves at Trist, Draper's new Plymouth depot.



The third subsidiary, Minett Fluid Power Limited, which was acquired in 1977 continues to strengthen Trist, Draper's position in the field of hydraulic systems and components.

The latest developments within Trist, Draper itself, however, represent a logical follow-up to policies originally formulated several years ago, when the company began a substantial investment programme to streamline production of "Top Dog" friction materials, and other automotive products, at the Bristol factory.

Not only has investment taken place in manufacturing facilities but also in distribution. Since the last issue of "Cape Review", five new service and distribution centres have opened, boosting the total list to a record figure of 21, stretching from North East Scotland to South West England.

All are situated in modern, purpose-built warehouses, with ample stocking facilities, convenient access and well-equipped workshops offering the full range of installation and assembly services on both friction materials and hydraulic hose.

First of the new depots to open were those at Swansea – replacing older, outdated premises in the same city – and at Aberdeen, which represented an expansion into a new market area.

Early last year, the next phase of the programme began with the introduction of new premises for the Plymouth depot, and not long afterwards, there were similar developments in the North West, when the St. Helens depot closed and its staff moved down the road to a brand-new warehouse in Liverpool.

The latest stage of the plan occurred last summer, when the London depot's business was split, and the eastern half taken over by a new centre at Dartford.

Expansion of the depot network has been accompanied by major developments to the product range, to boost sales volume and profitability.

In the summer, the latest friction material for heavy commercial vehicles

Right:
Trist, Draper's new vehicle livery designed to simplify the relationship between the company name and its well known "Top Dog" trade name.

Below:
Service counter at Trist, Draper's new Plymouth depot.

joined the successful family of "Top Dog" products. Designated type 1040 HD, it represents a significant technical breakthrough, offering users the same performance standards they expect from "Top Dog" – but with substantially improved service life!

On the hydraulics front, a new marketing organisation has been set up to further strengthen the Company's position as a principal supplier of hydraulic hose and components. At the same time a new type of thin-cover hydraulic hose has been introduced for both the original equipment and replacement markets.

Carrying the trade name "Eagle", the new material is exclusive to Trist, Draper, and extends and compliments the company's range of hydraulic products, which will continue to include the full list of "Aeroquip" materials which have been supplied for replacement applications over many years.

The addition of the "Eagle" range to the Trist, Draper catalogue will make the company the largest independent distributor of hose and fittings in the country. A major capital investment programme has been carried out to equip every depot with large-capacity swaging presses, enabling customers to obtain complete hose assemblies made up to their own requirements.

All of these new developments set the scene for growth into the 1980s and beyond.

Advertising and trade literature for Trist, Draper's new and exclusive thin-wall hydraulic hose.

Starting and stopping

CAPE AUTOMOTIVE LIMITED

Cape Automotive Limited, formerly Cape Distribution (Holdings), is known primarily as one of the leading wholesalers of braking components in the U.K., capable of supplying virtually the complete braking requirements for anything from a Mini to a 32-ton juggernaut.

However, the 65 branches of Cape Automotive are as interested in starting vehicles as they are in stopping them – as their prominent position in the U.K. battery distribution business demonstrates. With annual sales of automotive batteries standing at around £2 million, Cape Automotive has become something of a specialist in the supply of automotive batteries for a vast array of uses, including not only motor cycles, cars and commercial vehicles, but also police radios, electric fences, river barges and even prison cells.

But, the supply of a battery in a fully charged condition is only the final step in a series of other, more demanding activities which the battery wholesaler is expected to undertake.

The lead acid battery generally leaves the factory in a dry charged state, the plates which constitute the battery have been preformed with their electrical characteristics, but they still require the addition of acid and further charging to bring the battery to its full operating state. These steps are undertaken by the battery wholesaler, and that is why the typical Cape Automotive branch incorporates what amounts to a mini production line, where many benches of batteries are subjected to lengthy electrical charging after being filled with acid from a specially housed acid tank.

The skills involved in this operation, together with the requirements for comprehensive testing and diagnostic procedures, have created among Cape Automotive personnel, a team of battery experts who have gained a reputation among their customers for their knowledge and sound advice.

The wholesaler in turn relies heavily upon the manufacturer's technical expertise, and Cape Automotive is fortunate in that its major supplier – the Chloride Group – is one of the world's largest and most advanced manufacturers of batteries of every type. In fact, taking together its production of both original and replacement equipment, Chloride is the largest manufacturer of batteries in the U.K. Moreover, in world terms, the Group accounts for seven per cent of total world production, with factories in every continent.

Established in 1891, Chloride rapidly became a major force in its industry – a

All Cape Automotive depots provide a rapid delivery service.

Cape Automotive is the Chloride Group's largest U.K. distributor of Dagenite batteries including the new extended Low Maintenance range as illustrated.

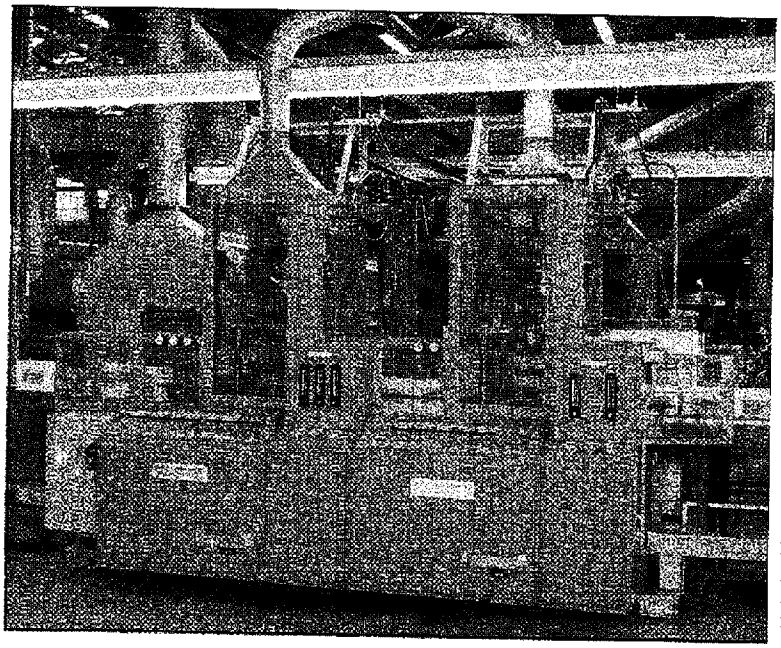
A battery charging facility at a Cape Automotive depot.

process accelerated by acquisitions of competitors and an agreement with ESB of America for the exchange of technical information and manufacturing rights to new processes. In 1965 Chloride Batteries, Tudor DP and Pritchett & Gold merged to form one company – Electric Power Storage Limited – which now trades as Chloride.

Today, the Group is almost completely self-contained as regards battery manufacture, producing its own battery cases and separators and buying and smelting its own metals. Chloride also prides itself on being in the forefront of new battery technology – both in developing an improved lead acid battery and in working to create a new generation battery with a completely different technology – the sodium sulphur battery. Work on the lead acid side led to the launch of Chloride's low maintenance range, featuring longer shelf life, less gassing, less water loss and less corrosion.

As Chloride's largest distributor of the Dagenite brand, and as their second-largest distributor of all replacement batteries, Cape Automotive is keenly interested in the changes which are taking place both in the battery as a product and in the manufacturing process itself. Battery manufacture was, until very recently, essentially a manual operation, but now Chloride has pioneered automatic assembly, and has installed in the Group's Dagenham plant two fully-automated assembly lines designed and built by Chloride engineers.

A view of the new automatic assembly line at Chloride's Dagenham factory.



The importance of such manufacturing developments is perhaps most readily appreciated by a company such as Cape Automotive, which experiences the often violent seasonal fluctuations in demand for batteries, which impose heavy burdens on manufacturing capability.

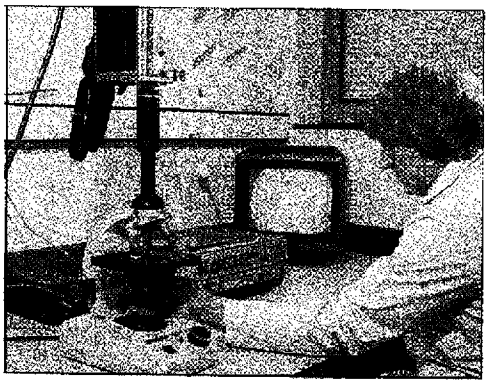
Batteries already play a vital role in our lives, and their value, it seems, could increase considerably, perhaps replacing fossil fuels as the power source for automotive vehicles – a prospect anticipated with enthusiasm by Cape Automotive Limited.

Monitoring and analysis

CAPE ENVIRONMENTAL SERVICES LABORATORY

The Environmental Services Laboratory of Cape Industries Limited, based at Uxbridge, is now firmly established as a specialised consultancy undertaking technical investigations into a wide range of environmental problems. While its main commitment is to provide technical support to environmental facilities within the Cape Industries Group, it is developing rapidly to meet the increasing demand for its services from many other organisations.

The Laboratory was set up in 1970 to develop asbestos dust monitoring techniques and to standardise measurement systems throughout the Group. This has resulted in individual factory laboratories within the Group attaining consistently high standards of fibre counting now further developed through the introduction of model rules and standardised graticules into the counting method. As a result of the Laboratory's long experience in this field it has been named as one of the five "master laboratories" in the Central Reference Scheme set up jointly by the Asbestosis Research Council and the Health and Safety Executive.



CCTV/Video system attached to optical microscope for examining airborne dust.

Mini computer input terminal linked with gas chromatograph equipment for chemical analysis.

Second only to dust control and monitoring is the question of noise abatement. In this area the Environmental Services Laboratory (ESL) has co-ordinated the introduction of a noise measurement programme throughout the group and follows up with regular on-site checks, progress assessments and by keeping abreast of the evolution of noise measuring equipment.

Evaluation of monitoring equipment and techniques is an important aspect of ESL's work and a number of diverse instruments and systems have undergone rigorous trials before recommendation for their deployment in the group. This is a continuing task to ensure the best possible operational control of working environments.

The ESL consultancy service began about five years ago with a project for the Asbestosis Research Council (ARC) – measuring airborne asbestos dust levels in workplaces, and identifying asbestos types in bulk materials. Today, ESL looks after over 100 fee-paying clients a year, providing site visits as well as laboratory analysis of samples covering a variety of materials including minerals, particulate dusts, fibrous dusts, metals, chemicals, fumes and gases as well as bacterial contamination.

ESL has built up an experienced scientific and technical team together with an impressive inventory of laboratory and portable measurement and analysis instrumentation. Although this represents Cape's own attitude to environmental priorities the work and services of ESL are becoming of increasing relevance to a wide range of industries.

Looking to the future, ESL will continue to expand its range of services to cope with the increasing demand for specialised environmental facilities. On the consultancy front, noise measurement and control together with chemical analysis of airborne contaminants are seen to be the two major growth areas.

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