Optimistic outlook

The annual report on the UK market by network specialist **ARTHUR RENSHAW**, UK and Ireland manager of Experian Catalist

It's been another interesting year, but thankfully there has been some stability in the market. Those of you who were at the Top Indies Dinner in March and at Forecourt Live! at the NEC in April will have seen evidence that things are looking quite good for the independent forecourt sector in 2013.

The issues with the UK refineries covered in my last review in June 2012 have all settled down and the final closure of Coryton (leaving only seven operational refineries in the UK) has happened with hardly any noticeable lasting effects.

There have been two major reviews of the market in the past year. The Department of Energy & Climate Change (DECC) commissioned a report from Deloitte on the retail fuel market with an emphasis on the resilience and security of retail fuel supplies. While some, including the PRA, dismissed the final report as a 'whitewash', it gave the present situation a clean bill of health.

In addition, last November the Office of Fair Trading (OFT) called for evidence of 'wrong-doings' in the industry. It determined that the industry was working well and was not disadvantaging the final consumer, and therefore there was no need for a full investigation.

As part of its preliminary investigations, the OFT was even able to debunk the so-called 'rocket and feather' theory that forecourt prices go up like a rocket and come down like a feather. They managed, through the use of complex mathematics, to prove that the opposite was true and that it took longer for price increases to pass through to the consumer, and that prices came down quickly because of competition.

For some reason the press failed to pick up on this as a story and so despite proof to the contrary the 'rocket and feather' principle with respect to prices on the forecourt is still firmly in the consumer's mindset. Last but not least as we go to press, the EU antitrust regulator is carrying out an investigation into alleged oil price fixing, and who knows where this may lead over the next few months.

Ask any member of the public and they will almost certainly have a go about the price of fuel on the forecourt and how much it has gone up. However, if you look at the chart on page 29, you will see that the pump price has gone down by 6.5ppl – 7.5ppl over the past year (May 2012 – May 2013) and that retail prices have been relatively stable around a range +/-5ppl for the past two years.

This was helped by the fact that the Government has steered away from increasing tax and duty over the past two years and it looks likely to continue with this policy until at least the next election. In March the *Sunday Times* produced statistics that showed the annual fuel costs of running an average family car have not changed since the 1970s, and as a percentage of the average household income, the costs have almost halved. In 1973 the adjusted annual fuel costs were £1,508 (13% of average household income) and in 2013 the adjusted annual fuel costs are £1,422 (7.8% of average household income).

UK MARKET BREAKDOWN Table 1

BRAND	NO OF OUTLETS	AV VOL (KL PA)	% MARKET SHARE	% OUTLET SHARE	MKT EFFECT--IVENESS
TESCO	497	11,510	16.0%	5.8%	2.8
BP	1,211	4,401	15.0%	14.1%	1.1
SHELL	1,032	4,848	14.1%	12.0%	1.2
ESSO	889	4,152	10.4%	10.3%	1.0
MORRISONS	314	11,005	9.7%	3.7%	2.7
SAINSBURYS	286	11,845	9.4%	3.3%	2.8
TEXACO	819	2,666	6.1%	9.5%	0.6
ASDA	218	8,880	5.4%	2.5%	2.1
GB OILS	999	1,434	4.0%	11.6%	0.3
MURCO	451	1,889	2.4%	5.3%	0.5
JET	312	2,722	2.4%	3.6%	0.7
RONTEC	150	2,819	1.2%	1.7%	0.7
UNBRANDED	701	602	1.2%	8.2%	0.1
MINOR BRAND	341	1,136	1.1%	4.0%	0.3
HARVEST ENERGY	107	2,475	0.7%	1.2%	0.6
MAXOL	104	1,544	0.5%	1.2%	0.4
GLEANER	66	845	0.2%	0.8%	0.2
TOPAZ	28	1,871	0.1%	0.3%	0.5
FOOD STORE	29	983	0.1%	0.3%	0.2
RIX	36	629	0.1%	0.4%	0.2
UK TOTAL	8,590	4,147	100.0%	100.0%	1.0

Fuel volumes

Despite the harsh economic climate and the focus on fuel prices, the forecourt and convenience sector has remained generally positive over the past year. There has been much made of falling fuel volumes but the official figures from the Government show deliveries of motor fuels (petrol and diesel) for the full year 2012 were only 1.1% down against 2011 levels. This continued the trend from 2010/2011 which was 1.2% down on the previous year.

Behind the 2012 full-year figures is a 3% increase in retail diesel volumes and a 4.7% decrease in petrol volumes. At the macro level the combined effect of fuel efficiencies, environmental legislation, fuel prices and social trends is having an impact on total fuel demand, and the question will continue to be by how much and how fast will demand fall away over the coming years.

From a property perspective, forecourt and convenience values are continuing to hold up better ▶

UK FUEL MARKET BY OWNERSHIP Table 2

OWNERSHIP	NO OF OUTLETS	AV FUEL VOLUME (KL PA)	% FUEL MARKET SHARE	% FUEL OUTLET SHARE	MKT EFFECTIVENESS (FUEL)	% WITH FCT SHOP	% WITH CAR WASH
HYPERMARKET	1,315	11,023	40.5%	15.3%	2.6	84%	57%
DEALER	5,187	2,193	31.9%	60.4%	0.5	85%	45%
OIL COMPANY	2,088	4,687	27.5%	24.3%	1.1	100%	54%
UK TOTAL	8,590	4,147	100%	100.0%	1.0	88%	49%

Note: C-stores and standard shops included – excluding kiosks

UK FORECOURT SHOP MARKET BY FUEL BRAND Table 3

BRAND	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE	% SHOP OUTLET SHARE	MKT EFFECTIVENESS (SHOP) (£000)	AV SHOP SALES PER SQ MTR	AV SHOP SALES (£) PER '000LITRES
BP	1,205	774	91	21.8%	15.9%	1.4	8.5	175
ESSO	885	986	94	20.4%	11.7%	1.7	10.5	235
SHELL	1,031	575	67	13.8%	13.6%	1.0	8.6	117
TEXACO	786	575	76	10.6%	10.4%	1.0	7.6	210
GB OILS	736	326	50	5.6%	9.7%	0.6	6.4	179
TESCO	484	501	46	5.6%	6.4%	0.9	11.0	42
MURCO	417	373	52	3.7%	5.5%	0.7	7.2	187
SAINSBURYS	280	567	61	3.5%	3.7%	1.0	9.4	46
JET	309	393	53	2.9%	4.1%	0.7	7.4	144
MORRISONS	310	391	37	2.7%	4.1%	0.7	10.6	34
MINOR BRAND	241	380	53	2.1%	3.2%	0.7	7.1	262
UNBRANDED	408	215	42	2.0%	5.4%	0.4	5.1	267
MAXOL	98	741	74	1.7%	1.3%	1.3	10.0	467
RONTEC	150	412	54	1.5%	2.0%	0.7	7.6	146
HARVEST ENERGY	104	359	52	0.9%	1.4%	0.6	6.9	141
TOPAZ	28	632	82	0.4%	0.4%	1.1	7.7	338
FOOD STORE	29	548	90	0.4%	0.4%	1.0	6.1	558
ASDA	32	424	49	0.3%	0.4%	0.7	8.7	42
GLEANER	45	179	41	0.2%	0.6%	0.3	4.4	171
RIX	15	316	43	0.1%	0.2%	0.6	7.3	299
UK TOTAL	7,593	567	67	100.0%	100.0%	1.0	8.5	127

Note: C-stores and standard shops included – excluding kiosks

UK FORECOURT SHOP MARKET BY OWNERSHIP Table 4

OWNERSHIP	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE SHARE	% SHOP OUTLET	MKT EFFECTIVENESS (SHOP)
DEALER	4,407	463	63	47.6%	58.0%	0.8
OIL COMPANY	2,080	831	85	40.3%	27.4%	1.5
HYPERMARKET	1,106	484	47	12.1%	14.6%	0.8
UK TOTAL	7,593	567	67	100%	100.0%	1.0

Note: C-stores and standard shops included – excluding kiosks

UK FORECOURT SHOP MARKET BY TYPE Table 5

SHOP TYPE SHOP	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE	% OUTLET SHARE	MKT EFFECTIVENESS (SHOP)
C-STORE	1,975	1,140	136	52.3%	25.0%	2.1
STANDARD	5,618	365	43	47.5%	71.2%	0.7
KIOSK	294	30	12	0.2%	3.7%	0.1
NO SHOP	703					
UK TOTAL	8,590	567	67	100%	100.0%	1.0

than in most other sectors. Compared to high street retail, the forecourt sector has performed well and there have been no significant financial failures among the major players in the industry.

Another sign that the industry is in a reasonably healthy position is that over the past year we have again recorded a low net number of closures – a net 87 closures compared to 88 in the previous year. The total number of open sites declined from 8,677 to 8,590. The actual number of closures followed exactly the same pattern as the previous year. There was a total of 187 closures – 24 oil company owned and 161 dealer sites. These closures were primarily from unbranded (45), Texaco (18) and 13 each from Murco and Gulf. In the oil company owned sector 13 of the closures were from the Esso network.

We recorded 61 new-build sites over the year – 46 by the major multiple retailers (almost one new supermarket forecourt every week); 12 new dealer sites and three new oil company owned sites including the new Shell-branded M25 motorway service area at Cobham in Surrey. In addition 40 sites reopened after a period of closure.

One significant difference to the previous year was the number of sites changing from oil company owned to dealer owned – 166 in the past year compared to 19 in the previous year. More than 70 sites each for Esso and Rontec (Total), 13 for Shell and six for BP moved into the dealer sector. The net result is that the number of dealer sites is 5,187, just nine down on the previous year. We also recorded that almost 750 sites changed fuel supplier brand over the past year.

Market structure

Compared with the Forecourt Trader Fuel Market Review 2012, UK site numbers have declined by a further net 87 sites, and there are 8,590 open retail sites with an average fuel volume of more than 4.1mlpa; and shop sales of £4.3bn – an average of £10,500 per week from an average 65sq m shop.

Nearly one third of the 5,187 independent dealer sites in the UK are operated by dealer groups with three sites or more. The average dealer site now sells 2.2mlpa and turns over £9,000 per week through a 63sq m shop. With more than 15% (1,315) of the sites, the major multiples have gained further market share. They now control 40.5% of motor fuel sales (38.7% last year) and they are the single largest sector. The dealer sector has not changed since last year with 60% of the sites and a 32% motor fuel market share. The oil company owned sector now has less than 25% of the sites and is also down to less than 27.5% market share.

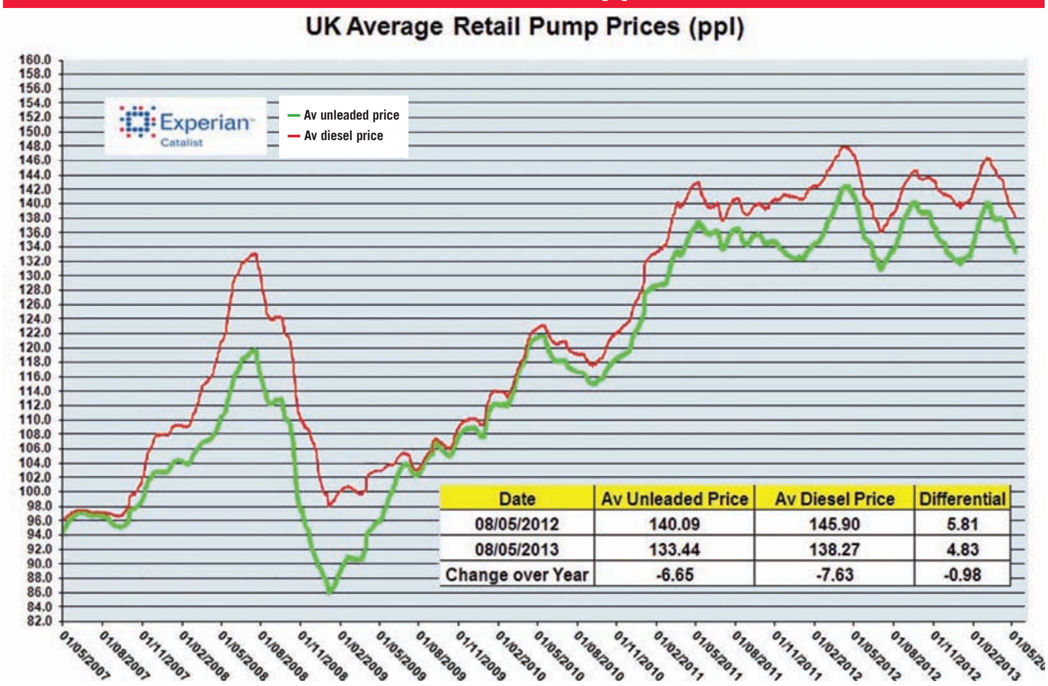
The regional breakdown of the forecourt sector continues with the market dominated by the South East, which continues to have almost a quarter of the sites and 30% of the UK's motor fuel, with 34% of forecourt shop sales concentrated there. Northern Ireland has the smallest regional market, but there has been a lot of activity in the past 12 months with new sites entering the market and the number of open sites has increased. As a vote of confidence Maxol is investing £40m in its network across Ireland.

Market shares and brands

As expected Rontec (Total) is the biggest loser over the past 12 months (-144) and Shell is the biggest gainer (+193) as it completed its programme of rebranding the sites acquired from Rontec. All the major multiple retailers added sites into their network over the past year, as did BP (+36), Esso (+22), Murco (+14) and Harvest Energy, which added 24 sites taking its total to 107. Other than Rontec the biggest losers were Texaco (-56) and Jet (-15), The unbranded sites remain at just over 700 but they are most vulnerable to the continued squeeze on margins and to the pressures on the environmental factors surrounding forecourt operation.

In the dealer sector GB Oils supplies the most sites with 993, followed by BP with 893 (+24), and Texaco has slipped to third

UK AVERAGE RETAIL PUMP PRICES (ppl)



Date	Av Unleaded Price	Av Diesel Price	Differential
08/05/2012	140.09	145.90	5.81
08/05/2013	133.44	138.27	4.83
Change over Year	-6.65	-7.63	-0.98

with 819 (-56) sites. Esso was the largest gainer of dealer sites this year (+103) as it moved a number of tranches of its company owned sites into the dealer network with EuroGarages and MRH. In terms of motor fuel market share in the dealer sector, BP leads the way with 29.4%, Texaco is next with 19.2%, followed by GB Oils with 12.5%.

At this year's Forecourt Show Greenergy officially announced what had been expected for some time – that it would offer fuel supply to the independent dealer sector with a slate of optional forecourt brands including Esso, Nisa or ST1 under its 'freedom to choose' campaign.

At the Top Indies Dinner, the Greenergy CEO Andrew Owens declared that "the age of the independent dealer is upon us". Also at the Forecourt Show Harvest Energy announced the option of using the Spar brand across the forecourt as well as on the shop. We will have to watch how this develops over the next 12 months, but it is clear that unbranded white tankers on the forecourt will be a more common sight in the future.

Forecourt shops

Overall the forecourt shop sector has reduced only slightly to £4.2bn sales per year in the UK. Similarly to last year, in the dealer market shop sales are more than £2bn per year (almost 48% of the forecourt shop sales sector). Within the dealer sector 85% of sites have a shop and 24% of the sites (1,110) have a full c-store.

This year we have added a new table showing sites by their forecourt shop fascia. The Tesco shop fascia leads the way on 680 sites (including the Esso/Tesco alliance sites as well as the shops on their own forecourts), and they have almost 17% of the £4.2bn forecourt shop market.

Spar is next, being the main symbol fascia on almost 600 forecourts and achieving a 10% market share. Third is the Shell Select fascia with almost 500 sites and a 7% market share. At the other end of the scale more than 20% of forecourt shops (1,661) have no brand on their forecourt shop. In terms of regional distribution, the South East dominates with 34% of forecourt shop sales and no other region has more than 9%.

Finally some of you may have noticed there is some juicy goings on in Birmingham – if you are on the Smallheath Highway you have a choice between filling up at Lime or Applegreen. ▶

UK FUEL & SHOP MARKET – DISTRIBUTION BY REGION Table 6

UK STANDARD REGION	NO OF OUTLETS	AV FUEL VOLUME (KL PA)	AV SHOP SALES (£K PA)	% OUTLETS	% FUEL VOLUME	% SHOP SALES
SOUTH EAST	2,097	5,172	739	24%	30%	34%
NORTH WEST	768	4,802	496	9%	10%	8%
SOUTH WEST	865	3,889	517	10%	9%	9%
WEST MIDLANDS	729	4,442	556	8%	9%	9%
SCOTLAND	870	3,527	384	10%	9%	7%
YORKSHIRE AND HUMBER	676	4,096	422	8%	8%	6%
EAST MIDLANDS	665	3,938	509	8%	7%	7%
WALES	545	3,538	431	6%	5%	5%
NORTH	442	3,839	389	5%	5%	4%
EAST ANGLIA	384	3,973	557	4%	4%	4%
NORTHERN IRELAND	549	1,600	567	6%	2%	7%
UK TOTAL	8,590	4,147	567	100%	100%	100

Note: C-stores and standard shops included – excluding kiosks

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Welcome to this year's Fuel Market Review – a listing, in site number order, of the main fuel suppliers and distributors in the petrol retailing market, as well as the key supermarket players. The information has been compiled from questionnaires completed by the relevant companies. The tables at the end have been supplied by Experian Catalist

Fuel Brand	BP	Shell	Esso
Company Name	BP Oil UK Ltd	Shell UK Oil Products Ltd	Esso Petroleum Company Ltd
Address	Witan Gate House, Witan Gate, Milton Keynes MK9 1ES	Shell Centre, York Road, London SE1 7NA	ExxonMobil House, Ermyn Way, Leatherhead, Surrey KT22 8UX
Telephone	01908 853000	020 7934 1234	01372 222000
Email	careline@bp.com		customer.care@exxonmobil.com
Website	www.bp.com/uk	www.shell.com	www.exxonmobil.co.uk
Head of retail	Neale Smither	David Moss	Simon Herbert
Number of supplied sites	1,230	1,042	927
Number of branded sites	1,230	1,042	927
Number of dealers	915	229	434
Number of co-owned sites	315	809	493
Co-owned (direct managed)	230	•	277
Co-owned (franchisee/com-op)	80 franchise	see below*	Alliance, agency operated
Areas of operation	UK	UK	UK
Fuels supplied (Bio/Premium/LPG)	UL, Ultimate UL, diesel, Ultimate diesel, LPG	Shell V-Power / Fuelsave UL & diesel, UL & diesel	Energy (UL, Supreme, diesel, Supreme diesel)
Forecourt shop format/brand	BP Connect / BP Shop	Select Shops of which 255 are Deli2Go	On the Run (108), Snack and Shop (169)
Tie-ups with other major brands	300 Wild Bean Coffee and 160 M&S Simply Food	664 Costa Coffee, Waitrose (10 company owned 5 dealer)	198 Tesco Express, 220 Costa Coffee
Major promotions/loyalty scheme	Nectar	Shell Drivers Club (partners Avios and Waitrose)	Tesco Clubcard *
Number of car washes	625 car wash, 525 jet wash	432 sites with car washes	316
Number of sites with LPG	205	190	•
Outside payment terminals	•	219	151
Sites with alcohol licences	675	365 company owned	453
Sites with ATMs	985	397	487
Any other comments		* 775 retail business agreement, 10 retail franchise agreement, 24 company owned dealer operated.	* Currently available at 198 Tesco Express sites.

Fuel Brand	Texaco	UK/Texaco/Scottish Fuels/Regent*	Gulf
Company Name	Valero Energy Ltd	GB OIls	Gulf Retail (GB Oils)
Address	1 Westferry Circus, Canary Wharf, London E14 4HA	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG
Telephone	020 7513 3737	01925 858500	0845 456 6300
Email	customercare@valero.com	info@gb-oils.co.uk	retail@gulfretail.co.uk
Website	valero.com; texaco.co.uk; starrewards.co.uk	www.gb-oils.co.uk	www.gulfoil.co.uk
Head of retail	Andrew Cox	Ramsay Macdonald	Ramsay Macdonald
Number of supplied sites	720	632	534
Number of branded sites	780 (including 60 authorised distributor sites)	632	534
Number of dealers	720	•	490 (approx)
Number of co-owned sites	5	18	8
Co-owned (direct managed)	•	18	7
Co-owned (franchisee/com-op)	Tenant	•	•
Areas of operation	England, Wales, Northern Ireland	UK	UK
Fuels supplied (Bio/Premium/LPG)	Diesel, Premium UL, Super UL, Supreme UL/diesel, LPG	UL & diesel, Endurance UL & diesel, Flogas	UL & diesel, Endurance UL & diesel, Flogas
Forecourt shop format/brand	•	Londis on 16 (Scotland and North England)	480
Tie-ups with other major brands	•	Tchibo Coffee, Londis, Spar, Mace	Costa, Londis, Spar, Mace
Major promotions/loyalty scheme	Star Rewards	Gulf account card	Gulf account card and Total Fuel card
Number of car washes	•	17 (company owned)	187
Number of sites with LPG	•	•	45
Outside payment terminals	•	•	36
Sites with alcohol licences	•	6 (company owned specific)	103
Sites with ATMs	•	8 (company owned specific)	70
Any other comments	Valero is committed to growing its share of the UK dealer market. To support growth plans, we have continued to invest in our supply infrastructure.	.* Also Carlton/ Esso/BP Power.	All of the above information incorporates the network of Total-branded dealers (220). GB Oils continues to invest in its infrastructure and expand its operations.

"BP is committed to growing its position in the UK fuel and convenience retail market. Our strengthening partnerships with M&S, Nectar, and the best retail dealers in the UK, give us confidence for the future"

Neale Smither, UK supply, marketing and retail manager, BP

Fuel Brand	Tesco	Murco	Jet
Company Name	Tesco Petrol Filling Station	Murco Petroleum Ltd	Phillips 66 Limited
Address	New Tesco House, Delamare Road, Cheshunt EN8 9SL	4 Beaconsfield Road, St Albans, Hertfordshire, AL1 3RH	2 Kingmaker Court, Warwick CV34 6DB
Telephone	0800 505555	01727 892400	01926 404000
Email	customer.services@tesco.co.uk	murco_uk@murphyoilcorp.com	
Website	www.tescopfs.com	www.murco.co.uk	www.jetlocal.co.uk
Head of retail	Peter Cattell	Jamie Goodfellow	Lindsey Grant, Guy Pulham
Number of supplied sites	496	452	320
Number of branded sites	496	452	320
Number of dealers	•	222	320
Number of co-owned sites	•	230	•
Co-owned (direct managed)	•	•	•
Co-owned (franchisee/com-op)	•	230 com-op	•
Areas of operation	UK	England, Scotland, Wales	Scotland and English regions*
Fuels supplied (Bio/Premium/LPG)	Tesco UL & diesel, Tesco Momentum99 Super UL, AdBlue	super UL, premium UL, low sulphur diesel	unleaded, super unleaded, diesel
Forecourt shop format/brand	465 Tesco Petrol Station Kiosk, 19 Tesco Express	Costcutter, Costcutter Express, ShopStop, 2N's	•
Tie-ups with other major brands	40 Costa	30 Costcutter, 198 Express, 2 ShopStop, 146 2N's	•
Major promotions/loyalty scheme	Clubcard	Shop-based Costcutter promotions	Merlin 2for1 promotion, Standards & Service programme
Number of car washes	Rollover car wash 199, jet wash 135, conveyor 27	180 jet wash, 88 rollover	•
Number of sites with LPG	•	15	•
Outside payment terminals	477	•	•
Sites with alcohol licences	19	213 co-owned, 80 dealer	•
Sites with ATMs	55	156	•
Any other comments	The Esso Service Stations that have a Tesco Express store attached are not included in these numbers.	Murco is actively looking to recruit new dealers to its brand.	*North-east England, East England, South-east England, Midlands.

Fuel Brand	Morrisons	Sainsbury's	Co-operative Food*
Company Name	Wm Morrison Supermarkets plc	Sainsbury's Supermarkets Ltd	The Co-operative Group
Address	Hilmore House, Gain Lane, Bradford, West Yorkshire BD3 7DL	33 Holborn, London EC1N 2HT	Dantzic House, Dantzic Street, Manchester M60 4ES
Telephone	0845 611 5000	020 7695 6000	0161 246 3053
Email		via website	petrol@co-operative.coop
Website	www.morrisons.co.uk	www.sainsburys.co.uk	www.co-operative.coop
Head of retail	Mark Todd	Helen Buck	Mike Osmond
Number of supplied sites	314	282	219
Number of branded sites	314	282	219
Number of dealers	•	•	•
Number of co-owned sites	314	•	219
Co-owned (direct managed)	314	•	219
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	England, Scotland and Wales	UK	UK
Fuels supplied (Bio/Premium/LPG)	UL EN228, diesel EN590 and LPG EN4250	UL, super UL, diesel & LPG	All retail grades
Forecourt shop format/brand	314 Morrisons	280	219 Co-operative Food
Tie-ups with other major brands	•	Coffee offer on 21 sites	•
Major promotions/loyalty scheme	Morrisons Miles and Fuelsaver	Nectar	Co-operative membership
Number of car washes	580	Car washes 180, jet washes 110	170
Number of sites with LPG	67	6	25
Outside payment terminals	2,053	12	•
Sites with alcohol licences	•	175	165
Sites with ATMs	•	26	180
Any other comments			* Co-operative petrol stations sell fuel under BP, Esso, Texaco, Total, Gulf, Shell and Flogas brands.

"All our energies are focused on helping independent businesses grow and prosper. We will continue to work harder to serve customers better and to grow our presence in the market"

Ramsey MacDonald, director of retail, GB Oils

Fuel Brand	Asda	Harvest Energy	Maxol
Company Name	Asda	Harvest Energy Ltd	Maxol Oil Ltd
Address	Asda House Southbank, Great Wilson Street Leeds LS11 5AD	2 Cavendish Square, London W1G 0PU	48 Trench Road, Mallusk, Co Antrim BT36 4TY
Telephone	0113 243 5435	0844 225 3082 / 020 7580 0033	028 9050 6000
Email	jeremy.walton@asda.co.uk	retail@harvestenergy.co.uk	post@maxol.ie
Website	www.asda.com	www.harvestenergy.co.uk	www.maxol.ie
Head of retail	Jeremy Walton	Simon Davis	Brian Donaldson
Number of supplied sites	216	138	97
Number of branded sites	216	109	97
Number of dealers	•	138	66
Number of co-owned sites	216	•	31
Co-owned (direct managed)	216	•	2 (both unmanned)
Co-owned (franchisee/com-op)	•	•	28 (licensed), 1 (consignee)
Areas of operation	UK	England, Scotland and Wales	Northern Ireland
Fuels supplied (Bio/Premium/LPG)	UL, diesel, LPG	UL, Super UL and diesel	UL, Super UL and diesel
Forecourt shop format/brand	34	•	Spar on 26 co-owned sites
Tie-ups with other major brands	•	Mobil lubricants and Mobil 1 branding	•
Major promotions/loyalty scheme	•	•	•
Number of car washes	36 rollover	•	16 rollover, 18 jet (co-owned sites)
Number of sites with LPG	14	•	•
Outside payment terminals	1,110	•	16*
Sites with alcohol licences	3	•	•
Sites with ATMs	3	•	23
Any other comments		Still actively seeking new independent retailers throughout England, Scotland and Wales to continue to grow the Harvest Energy brand.	* Outside payment terminal number includes unmanned sites.

Fuel Brand	Pace	Rix	Gleaner
Company Name	Pace Fuelcare Ltd	Rix Petroleum	Gleaner Oils Ltd
Address	Hannover House, 18 The Avenue, Egham, Surrey TW20 9AB	Witham House, 45 Spyvee Street, Hull HU8 7JR	Milnfield, Elgin, Morayshire IV30 1UU
Telephone	01784 484460	01482 224422	01343 557400
Email	enquiries@pacefuelcare.co.uk	duncan.lambert@rix.co.uk	oilandgas@gleaner.co.uk
Website	www.pacefuelcare.co.uk	www.rix.co.uk	www.gleaner.co.uk
Head of retail	Ramsay Macdonald	Duncan Lambert	David Todd
Number of supplied sites	96	81	70
Number of branded sites	96	80	67
Number of dealers	96	79	57
Number of co-owned sites	•	2	9
Co-owned (direct managed)	•	1	9
Co-owned (franchisee/com-op)	•	1	•
Areas of operation	UK	Yorks, Lincs, central England, E Scotland, E Anglia	NE Scotland, Highlands, West Highlands & Islands
Fuels supplied (Bio/Premium/LPG)	UL & diesel, Endurance UL & diesel, Flogas	UL, diesel	ULSP, ULSD, bio diesel, bio ethanol, LPG
Forecourt shop format/brand	90	48	50
Tie-ups with other major brands	Londis, Premier and Mace	•	9
Major promotions/loyalty scheme	Pace Account Card	•	•
Number of car washes	24	•	32 jet wash
Number of sites with LPG	5	•	28
Outside payment terminals	2	•	•
Sites with alcohol licences	30	•	28
Sites with ATMs	15	•	4
Any other comments			

"Valero is committed to growing its share of the UK dealer market. To support growth, we have continued to invest in our supply infrastructure"

Andrew Cox, director of sales and marketing, Valero Energy

Fuel Brand	BWOC	Pace	Texaco/ Murco/ NWF/ Lincs/ Dragon
Company Name	BWOC Ltd	Tate Fuel Oils	NWF Fuels Ltd
Address	BW Estate, Oldmixon Crescent, Weston-super-Mare BS24 9BA	Leeds Road, Otley, West Yorkshire LS21 3BB	Wardle, Nantwich, Cheshire CW5 6AF
Telephone	01934 422179	01943 467444	01829 260900
Email	amy.davis@bwoc.co.uk	sales@tate-fuels.co.uk	len.hamilton@nwffuels.co.uk
Website	www.bwoc.co.uk	www.tateoil.co.uk	www.nwffuels.co.uk
Head of retail	Amy Davis	Andrew Tate	Len Hamilton
Number of supplied sites	63	50	47
Number of branded sites	22	13	47
Number of dealers	29	11	47
Number of co-owned sites	1	2	•
Co-owned (direct managed)	1	2	•
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	Nationwide	North England	England & Wales
Fuels supplied (Bio/Premium/LPG)	UL, super UL, diesel	UL, super UL, diesel, gas oil, kerosene	UL, super UL, diesel, gas oil and Kerosene
Forecourt shop format/brand	•	•	36
Tie-ups with other major brands	Mace on company owned site	•	Spar, Costcutter, Mace, Londis, Premier, Nisa
Major promotions/loyalty scheme	•	•	Texaco Star Rewards
Number of car washes	•	4 jet wash	32
Number of sites with LPG	1	•	2
Outside payment terminals	•	•	2
Sites with alcohol licences	•	•	30
Sites with ATMs	•	•	30
Any other comments		The company is actively seeking dealers to join its network.	NWF is taking on new dealer sites and the brands available are Texaco, Murco, NWF, Lincs and Dragon (Wales only). Call Len Hamilton on 07702 874241.

Fuel Brand	Topaz	Manx Petroleum
Company Name	Topaz Energy Ltd	Manx Petroleums LTD
Address	Beechhill, Clonskeagh, Dublin 4, Ireland	PO Box 47, Battery Pier, Douglas, Isle of Man IM99 1DE
Telephone	+353 1 202 8888	01624 691691
Email	info@topaz.ie	info@manxpetroleums.co.im
Website	www.topaz.ie	www.manxpetroleums.co.im
Head of retail	Frank Gleeson	David Kay / Judith Thomson
Number of supplied sites	33	8
Number of branded sites	33	8
Number of dealers	32	5
Number of co-owned sites	1	•
Co-owned (direct managed)	1	•
Co-owned (franchisee/com-op)	•	•
Areas of operation	Ireland and Northern Ireland	Isle of Man
Fuels supplied (Bio/Premium/LPG)	UL, bio petrol, Super UL, diesel, bio diesel, gas oil	Premium UL, Super UL, diesel, gas oil, LPG
Forecourt shop format/brand	•	•
Tie-ups with other major brands	•	4 Spar
Major promotions/loyalty scheme	Play or Park (newly launched loyalty scheme)	•
Number of car washes	•	5 rollover, 6 jet wash
Number of sites with LPG	•	1
Outside payment terminals	2	1
Sites with alcohol licences	•	2
Sites with ATMs	•	6
Any other comments	These numbers relate to the Topaz network in Northern Ireland only.	

"One significant difference to the previous year was the number of sites changing from oil company owned to dealer owned –166 in the past year compared with 19 in the previous year"

Arthur Renshaw, UK and Ireland manager, Experian Catalist

UK FORECOURT SHOP MARKET BY SHOP FASCIA

BRAND	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE	% SHOP OUTLET SHARE	MKT EFFECTIVENESS (SHOP)
TESCO / EXTRA / EXPRESS	680	1,053	85	16.8%	9.0%	1.9
SPAR / EXPRESS / EUROSPAR	599	725	94	10.2%	7.9%	1.3
SHELL SELECT	497	576	65	6.7%	6.5%	1.0
CO-OPERATIVE / FOOD	254	1,000	122	6.0%	3.3%	1.8
BP M&S SIMPLY FOOD	161	1,486	163	5.5%	2.1%	2.6
MACE / EXPRESS	428	452	58	4.5%	5.6%	0.8
COSTCUTTER / EXPRESS	338	474	63	3.8%	4.5%	0.8
SAINSBURYS / LOCAL	278	538	57	3.5%	3.7%	1.0
BP CONNECT	140	938	108	3.1%	1.8%	1.7
ESSO SNACK & SHOP	236	524	57	2.9%	3.1%	0.9
LONDIS / EXPRESS	219	544	73	2.8%	2.9%	1.0
MORRISONS	309	391	37	2.7%	4.1%	0.7
BP SHOP	225	450	52	2.4%	3.0%	0.8
ESSO ON THE RUN	108	897	103	2.3%	1.4%	1.6
SHELL SHOP	163	473	52	1.8%	2.1%	0.8
NISA / LOCAL / EXTRA	62	809	140	1.2%	0.8%	1.4
PREMIER / EXPRESS	95	503	74	1.1%	1.3%	0.9
BUDGENS	34	1,331	171	1.0%	0.4%	2.3
OTHER FASCIAS	1,106	390	50	10.1%	14.6%	0.7
UNBRANDED	1,661	303	45	11.6%	21.9%	0.5
UK TOTAL	**7,593**	**567**	**67**	**100.0%**	**100.0%**	**1.0**

Note: C-stores and standard shops included – excluding kiosks Note: Showing shop fascias with market share >1.0%

UK DEALER FORECOURT SHOP MARKET BY TYPE

SHOP TYPE	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP (SQ MTRS)	% SHOP MARKET SIZE SHARE	% SHOP OUTLET SHARE	MKT EFFECTIVENESS (SHOP)
C-STORE	1,110	923	128	50.1%	23.7%	2.1
STANDARD	3,297	307	41	49.5%	70.4%	0.7
KIOSK	277	29	12	0.4%	5.9%	0.1
NO SHOP	503	•	•	•	•	•
UK TOTAL	**5,187**	**437**	**60**	**100%**	**100.0%**	**1.0**

UK DEALER CAR WASH BY TYPE

BRAND	NO OF DEALER SITES WITH CAR WASH	SITES WITH JET WASH	SITES WITH AUTO WASH	SITES WITH CONVEYOR WASH
BP	583	450	364	8
ESSO	250	181	145	2
FOOD STORE	12	11	2	0
GB OILS	340	290	118	3
GLEANER	25	25	0	0
HARVEST ENERGY	55	47	21	0
JET	198	166	91	2
MAXOL	49	48	11	0
MINOR BRAND	103	90	27	1
MURCO	65	61	12	0
RIX	3	3	0	0
SHELL	132	118	61	1
TEXACO	473	381	210	3
TOPAZ	13	13	3	0
UNBRANDED	132	128	14	0
UK TOTAL (DEALERS)	**2433**	**2012**	**1079**	**20**

UK DEALER FUEL MARKET BY BRAND

BRAND	NO OF OUTLETS	AV FUEL VOLUME (KL PA)	% FUEL MARKET SHARE	% FUEL OUTLET SHARE	MKT EFFECTIVENESS (FUEL)
BP	893	3,751	29.4%	17.2%	1.7
TEXACO	819	2,666	19.2%	15.8%	1.2
GB OILS	993	1,425	12.5%	19.1%	0.7
ESSO	389	3,166	10.8%	7.5%	1.4
SHELL	228	3,905	7.8%	4.4%	1.8
JET	312	2,722	7.5%	6.0%	1.2
UNBRANDED	701	602	3.7%	13.5%	0.3
MINOR BRAND	301	914	2.4%	5.8%	0.4
HARVEST ENERGY	107	2,475	2.3%	2.1%	1.1
MURCO	219	1,127	2.2%	4.2%	0.5
MAXOL	74	1,335	0.9%	1.4%	0.6
TOPAZ	28	1,871	0.5%	0.5%	0.9
GLEANER	58	734	0.4%	1.1%	0.3
FOOD STORE	29	983	0.3%	0.6%	0.4
RIX	36	629	0.2%	0.7%	0.3
UK DEALER TOTAL	5,187	2,193	100.0%	100.0%	1.0

UK DEALER FORECOURT SHOP MARKET BY FUEL BRAND

SHARE BRAND	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	% SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE	% SHOP OUTLET SHARE	MKT EFFECTIVENESS (SHOP)	AV SHOP SALES (£000) SQ MTR	AV SHOP SALES (£) PER '000 LTR
BP	887	626	77	27.3%	20.1%	1.4	8.1	166
TEXACO	786	575	76	22.2%	17.8%	1.2	7.6	210
GB OILS	730	326	51	11.7%	16.6%	0.7	6.4	180
ESSO	385	499	65	9.4%	8.7%	1.1	7.6	155
SHELL	227	558	74	6.2%	5.2%	1.2	7.5	142
JET	309	393	53	6.0%	7.0%	0.9	7.4	144
UNBRANDED	408	215	42	4.2%	9.3%	0.5	5.1	267
MINOR BRAND	207	368	52	3.7%	4.7%	0.8	7.0	311
MAXOL	70	783	77	2.7%	1.6%	1.7	10.2	566
MURCO	185	276	50	2.5%	4.2%	0.6	5.5	224
HARVEST ENERGY	104	359	52	1.8%	2.4%	0.8	6.9	141
TOPAZ	28	632	82	0.9%	0.6%	1.4	7.7	338
FOOD STORE	29	548	90	0.8%	0.7%	1.2	6.1	558
GLEANER	37	183	43	0.3%	0.8%	0.4	4.2	200
RIX	15	316	43	0.2%	0.3%	0.7	7.3	299
UK TOTAL	4,407	463	63	100.0%	100.0%	1.0	7.3	184

Note: C-stores and standard shops included – excluding kiosks

“We are putting in place a dedicated team focusing on our dealer network to ensure we have a strong proposition that better meets their needs”

David Moss, general manager retail, north cluster, Shell UK Oil Products Ltd

SITE NUMBERS BY BRAND

BRAND	NUMBER OF SITES		
MAY	2011	2012	2013
3D	2	2	2
AMCO	1	1	1
ANGLIAN	1	●	●
ANGLO	5	5	4
APPLEGREEN	9	10	11
ASDA	187	195	218
BATA	2	2	2
BATES & HUNT	5	4	4
BAXTER JOHNSTON	3	2	1
BECA	1	1	1
BFL	5	5	4
BP	1169	1175	1211
BRENNANS	●	●	1
BRIDGE FUELS	●	●	1
BROADLAND FUELS	1	3	3
BROBOT	1	1	1
BUTLER	18	15	12
BWOC	21	20	17
CALLOW	3	3	2
CARLISLES	●	●	1
CARLTON	15	8	8
CENTRA	4	4	2
CGP	1	●	●
CLUB	4	3	2
COOKE	3	4	3
CO-OP	19	1	
COSTCUTTER	6	6	3
CPL	2	2	2
CRANSTON FUELS	1	1	1
DAY TODAY	4	2	1
DEANS	1	1	●
DEV OIL	1	●	●
DISCOUNT FUELS	1	1	1
DRAGON	9	9	7
EGAM	1	●	●
ELF	1	●	●
EMO	9	9	14
EP	1	1	1
ESSO	899	867	889
EURO OIL	1	1	1
EUROSPAR	●	●	1
EVESONS	1	1	●
EVOCO	1	●	●
EXPRESS	3	2	1
FLARE	9	7	8
GB	8	8	8
GLEANER	72	68	66

BRAND	NUMBER OF SITES		
MAY	2011	2012	2013
GLENDALE	1	●	●
GLOBE	1	1	1
GO	14	17	17
GULF	212	305	353
HARVEST ENERGY	30	83	107
HAVEN	1	1	1
HELTOR	5	6	6
HIGHLAND	12	11	9
HILLSIDE	1	1	1
HT	1	1	1
IMPERIAL	12	11	10
JB FUELS	1	●	●
JET	375	327	312
JET(EMO)	7	8	1
K9	1	1	1
KELTIC	2	3	3
KP	1	1	1
LIME	●	●	2
LINCOLNSHIRE FUELS	1	3	3
LOCAL	1	1	2
LONDIS	2	2	1
MAC	●	●	1
MACE	3	4	2
MAJOR	1	1	1
MALJEE	4	3	
MANX	8	8	8
MARTINDALES	2	1	1
MAXOL	99	101	104
MFS	1	1	1
MINSTER	2	2	2
MITCHELL & WEBBER	2	1	1
MOCO	1	1	●
MORGAN	●	●	3
MORRISONS	295	301	314
MURCO	411	436	450
NATIONAL	21	14	12
NISA	5	3	2
NORTHERN ENERGY	1	2	2
NWF	7	7	7
OAK	7	7	6
OIL4WALES	●	9	16
ONE	10	7	7
PACE	144	135	132
PARK & SHOP	6	3	2
PEVA	1	1	1
PHOENIX	2	2	2
POWER	72	73	79

BRAND	NUMBER OF SITES		
MAY	2011	2012	2013
PRAX	●	3	3
PRIMA	1	●	●
PRINCE	2	2	2
PROTEUS	17	11	12
QUALITY	1	●	●
RANGEHILL	1	1	1
RED ROSE	1	●	●
REGENCY OILS	6	6	6
REGENT	22	23	19
REPSOL	2	1	1
RIX	44	41	36
SAINSBURYS	262	265	286
SAVE	1	●	●
SCOTTISH FUELS	27	23	23
SEVERN FUELS	1	1	1
SHELL	876	839	1032
SHOP LOCAL	1	1	1
SMILE	2	●	●
SOLO	5	23	32
SOMERFIELD	13	●	●
SOUTHERN COUNTIES	1	●	●
SPAR	13	11	7
SPOT	8	7	6
SPUR	2	2	2
STAR	16	32	36
TATE	4	4	4
TEAM SPIRIT	1	●	●
TESCO	284	292	294
TESCO EXPRESS	19	19	19
TESCO EXTRA	173	181	184
TEXACO	861	852	800
THAMES	40	35	39
THRUST	6	6	5
TODAYS EXTRA	●	1	1
TOP	6	10	12
TOPAZ	18	22	28
TORQ	●	12	14
TOTAL	823	770	393
UK	107	95	85
UNBRANDED	734	663	662
UNITED	6	7	4
VIVO	8	9	6
WAITROSE	14	14	●
WATSON	1	1	1
WCF	32	31	26
XL STOP & SHOP	6	5	2

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