All change in 2012

The annual regional report on the UK by network specialist ARTHUR RENSHAW, UK and Ireland manager from Experian Catalist

I guess nothing should surprise us in the forecourt sector any more, but in the year since my last review in Forecourt Trader, there has been a ceaseless whirl of 'things going on' and there have been so many changes it's difficult to remember them all.

Everywhere you look there are changes happening and even in those areas that are apparently quiet there is speculation that something is about to happen. The headlines are the rise of Rontec and GB Oils and the demise of Total in the UK, as well as the operators of the Coryton refinery going into receivership and the tanker drivers appearing to settle their differences with the logistics companies which deliver our fuel to the forecourt.

The government's handling of the threat of a strike over Easter this year, other than being a case study in how not to do something, simply reinforced how important our industry is to the UK economy.

During the past few months an issue new to the UK forecourt sector was starting to be talked about and this may become the big thing in 2012 – the unbundling of fuel supply and forecourt brand, which means you may have supply from one company and put another brand on your forecourt.

Ask any member of the general 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 33, you will see that the pump price has only increased by about 3ppl since May 2011, compared to last year's review where the price of unleaded had increased by 16ppl and diesel by 20ppl on the previous year. Pump prices did reach a new record high in the second week of April this year with unleaded at 142.5 and diesel at 147.9, and while the government has not increased tax and duty over the past 12 months, we are facing a 3ppl plus VAT increase on August 1, 2012. The government looks set to let this increase take place despite hard lobbying by RMI Petrol's Brian Madderson and the FairFuelUK group.

The press and the consumers' focus on pump prices again for much of the past year has caused a continuing squeeze on margins, although with Platt's yo-yo-ing there have been periods when margins have been a bit more relaxed and have allowed the hard-pressed operators to recoup some of the losses from earlier periods.

Who knows what is going to happen to the cost of product. The continuing uncertainty in the Middle East is only adding to the questions, and the reasons for increases in the past 12 months now appear to be the same reasons that are contributing to the recent falls. It is clear that even the experts do not have consensus on which direction prices will go over the next 12 months.

The UK has eight operational refineries that supply the 8,677 open forecourts across the country. Over the past 12 months some circumstances have changed...

- **Stanlow:** Having been sold by Shell to the Indian-based Essar Group in 2011, Essar saw a collapse in its share price which has put a question mark over its long-term future as owner and operator of the UK's second-largest refinery.
- **Milford Haven:** The Murco refinery and retail network of 437 sites (189 company sites, 248 dealers) is still on the market one year on. Despite some speculation, there are no bids in the public domain.
- **Coryton:** Petroplus went into receivership in December and the refinery is only being kept open by arrangements with the receivers and the oil companies which rely on Coryton for the product liftings. Who knows what lies in store for the future of Coryton – it may close completely or become a storage

UK MARKET BREAKDOWN Table 1

SHARE BRAND	NO OF OUTLETS	AV VOL (KL PA)	% MARKET SHARE	% OUTLET SHARE	MKT EFFECT-IVENESS
TESCO	492	11,586	15.5%	5.7%	2.7
BP	1,175	4,652	14.9%	13.5%	1.1
SHELL	839	5,286	12.1%	9.7%	1.2
ESSO	867	4,362	10.3%	10.0%	1.0
MORRISONS	301	11,148	9.2%	3.5%	2.6
SAINSBURYS	265	12,144	8.8%	3.1%	2.9
TEXACO	875	2,762	6.6%	10.1%	0.7
GB OILS	1,199	1,941	6.4%	13.8%	0.5
ASDA	195	9,317	5.0%	2.2%	2.2
JET	327	2,854	2.5%	3.8%	0.7
RONTEC	294	2,897	2.3%	3.4%	0.7
MURCO	437	1,915	2.3%	5.0%	0.5
UNBRANDED	702	652	1.2%	8.1%	0.2
MINOR BRAND	331	1,160	1.0%	3.8%	0.3
HARVEST ENERGY	83	2,599	0.6%	1.0%	0.6
MAXOL	101	1,635	0.4%	1.2%	0.4
FOOD STORE	63	2,468	0.4%	0.7%	0.6
GLEANER	68	913	0.2%	0.8%	0.2
TOPAZ	22	1,845	0.1%	0.3%	0.4
RIX	41	657	0.1%	0.5%	0.2
UK TOTAL	8,677	4,216	100.0%	100.0%	1.0

UK MARKET OWNERSHIP Table 2

OWNERSHIP	NO OF OUTLETS	AV VOLUME (KL PA)	% MARKET SHARE	% OUTLET SHARE	MKT EFFECTIVE-NESS
COMPANY	2,213	4,776	28.9%	25.5%	1.1
DEALER	5,196	2,285	32.4%	59.9%	0.5
HYPERMARKET	1,268	11,198	38.7%	14.6%	2.6
UK TOTAL	8,677	4,216	100%	100.0%	1.0

Petroplus' refinery in Coryton, Essex went into receivership in December last year

terminal or it may possibly continue refining under the ownership of a company new to these shores.

- **Lindsey:** Total put its refinery and retail network on the market in 2010. As everyone now knows, the Rontec consortium (Snax24, Investec & Grovepoint Capital) only purchased the product supply and retail network leaving the refinery looking for another purchaser. With still no clear bidders by the end of January 2012, Total withdrew the sale of the refinery and will be regrouping to consider what to do next. Again anything could happen but closure is unlikely although Total will not wish to continue operating the site forever.
- **Killingholme:** The Conoco (Jet) refinery is not up for sale but Conoco is in the process of restructuring the group and the refining, and other downstream assets will be split off into 'Phillips66'. How this may affect the Jet brand in the UK is not clear, although Jet did exit the South West of the UK in 2011 for 'commercial reasons'.

There are a number of refineries/fuel supply companies such as Greenergy and Ineos which have no forecourt brand but are supplying/prepared to supply the dealer sector direct. At the FFE Show in March some of us were expecting an announcement from Greenergy. It never happened but we thought the company was going to announce that it would negotiate to supply the fuel and the dealer could then choose from a menu of forecourt brands at different prices ▶

UK FUEL/SHOP COMPARISON Table 3

SHARE BRAND	NO OF OUTLETS	AV VOL(L/PA) PER M2 PLOT SIZE	AV SHOP SALES (£000) PER M2 SHOP AREA	SHOP SALES (£) PER 000 LITRES
ASDA	195	4.8	10.4	6
BP	1,175	2.0	8.5	166
ESSO	867	2.1	10.5	225
FOOD STORE	63	1.7	7.8	219
GB OILS	1,199	1.3	7.3	151
GLEANER	68	0.8	4.1	120
HARVEST ENERGY	83	1.6	7.1	123
JET	327	1.7	7.7	134
MAXOL	101	1.1	10.8	536
MINOR BRAND	331	1.0	7.5	237
MORRISONS	301	4.7	10.6	34
MURCO	437	1.3	7.2	171
RIX	41	0.7	3.1	169
RONTEC	294	1.7	7.1	159
SAINSBURYS	265	5.6	9.5	45
SHELL	839	2.4	8.5	102
TESCO	492	5.2	11.0	42
TEXACO	875	1.7	7.5	190
TOPAZ	22	1.0	7.9	330
UNBRANDED	702	0.7	4.6	186
UK TOTAL	8,677	2.3	8.5	117

KEY FIGURES BY OWNERSHIP Table 4

OWNERSHIP	NO OF OUTLETS	AV VOLUME (KL PA)	AV FUELLING POSITIONS	AV PLOT SIZE (SQ M)	% WITH SHOP	% CAR WASH
COMPANY	2,213	4,776	8.3	2,232	100%	56%
DEALER	5,196	2,285	6.5	1,554	90%	48%
HYPERMARKET	1,268	11,198	11.6	2,253	86%	67%
UK TOTAL	8,677	4,216	7.6	1,805	92%	53%

DISTRIBUTION BY REGION Table 5

UK STANDARD REGION	NO OF OUTLETS	AV VOLUME (KL PA)	% OUTLETS	% FUEL VOLUME	% SHOP SALES
EAST ANGLIA	388	4,059	4%	4%	4%
EAST MIDLANDS	672	4,038	8%	7%	7%
NORTH	444	3,792	5%	5%	3%
NORTH WEST	773	4,916	9%	10%	8%
NORTHERN IRELAND	536	1,702	6%	2%	8%
SCOTLAND	895	3,534	10%	9%	7%
SOUTH EAST	2,120	5,268	24%	30%	34%
SOUTH WEST	875	3,977	10%	9%	9%
WALES	551	3,547	6%	5%	5%
WEST MIDLANDS	738	4,519	9%	9%	9%
YORKSHIRE AND HUMBER	685	4,158	8%	8%	6%
UK TOTAL	8,677	4,216	100%	100%	100%

depending on their market profile. This is something new to the market and could make it very interesting – if not a little confusing for the car driver (and a bit more difficult for Experian Catalist to know who is supplying). We do have a similar situation to this now with the Total brand, with some of the former Total company-owned sites being supplied by Rontec and the Total-branded dealers being supplied by GB Oils.

Fuel volumes

Despite all the economic woes and the focus on fuel prices, 2011/12 has continued where the previous year left off with the forecourt and convenience sector remaining generally positive. There has been much made of falling fuel volumes but the official figures from the government belie the anecdotal evidence and it can only be concluded that the volumes shifts are inconsistent and specific to certain products, regions and types of sites.

The official figures show that deliveries of motor fuels (petrol and diesel) for the full year 2011 were 1.2% down against 2010 levels. The last quarter of last year is showing at only 1% down against the previous year but hiding behind this figure is the fact that the supermarkets are 4% up and the rest of the network is 4.1% down. Behind the full-year figures is a 2.9% increase in retail diesel volumes and an almost 5% decrease in petrol volumes. It is true to say that 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 certainly holding up better than in most other sectors. Compared to high street retail, the forecourt sector has performed well. We have had only one failure from among the major players from the Top Indies and we have continued to see new players come into the sector – private equity is one investor that we have not seen much of before in the forecourt sector. And to reinforce the positive message we have continued to see new-to-industry and rebuilt sites coming on stream.

MRH operates 12 sites under the Torq brand, which it launched last year

As usual, at the various industry events throughout the year, dealers are still talking about expanding their networks and acquiring sites. We have even seen at least two new brands enter the market over the past year, both belonging to large dealer groups – Torq with 12 sites owned by MRH (GB), and PRAX from State Oil. Maybe there will be more new brands to follow?

Another sign that the industry is in a reasonably healthy position is that over the past year we have recorded the lowest net number of closures for many years – possibly ever – a net 88 closures.

There were 177 actual closures (25 company and 152 dealer sites) but 41 new-build sites and 48 sites re-opened after a period of closure. In addition, 19 sites changed from oil company owned to dealer owned, and more than 619 sites changed fuel supplier brand in 2011/12. Included in the new greenfield sites were 29 forecourts by the big four multiple retailers – Tesco, Asda, Sainsbury's and Morrisons. Also included are two motorway service areas under development on the M5, and those on the southern section of the M25 will have seen the works around Cobham for the new Shell services due to open this summer in time for the Olympics.

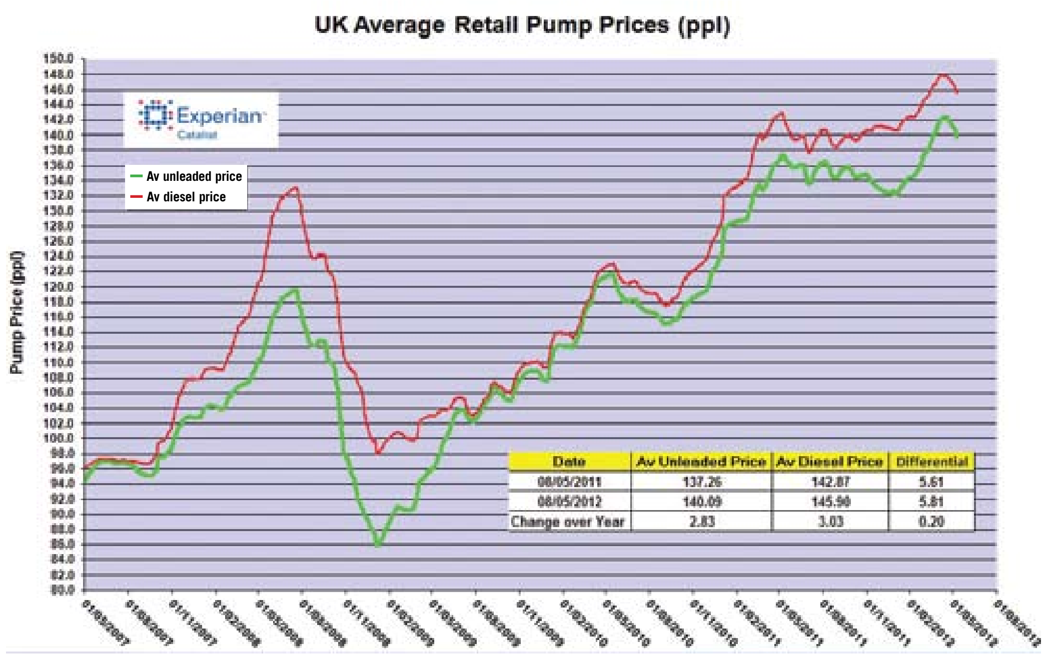
When we come to look at the data for the Forecourt Trader Fuel Market Review for 2013 there will have been a lot more changes and probably even more surprises but I am sure the industry will continue to adapt and re-invent itself!

Market structure

We are now reporting 8,677 open retail sites in the UK with an average fuel volume of over 4.2mlpa, and shop sales total of £4.3bn – an average of £540,000 per site/year.

There are 5,196 independent sites in the UK – a net reduction of 105 sites compared to the last review – and something over

UK AVERAGE RETAIL PUMP PRICES (ppl)



Harvest Energy is making big inroads in the dealer sector, adding more than 50 sites to its network

31% of these sites are operated by dealer groups with three sites or more. The average dealer site now sells 2.3mlpa and turns over £8,500 per week through the 63sq m shop – not a significant change from the previous year.

With almost 15% (1,268) of the sites, the multiple retailers have gained further market share and now control 39% of motor fuel sales and are the single largest sector. Note that during the past year the Co-op Group rebranded more than 30 sites from its own brand to major oil company brands under a dealer supply agreement. That has shifted all these Co-op sites from the hypermarket sector into the dealer sector. The dealer sector now has 61% of the sites and a 32% market share.

The regional breakdown of the forecourt sector continues to make interesting reading with the market dominated by the South East region, which has a quarter of the sites, 30% of the UK's motor fuel and 34% of forecourt shop sales concentrated there. As mentioned earlier, Jet has pulled out of the South West and Esso has had its network in Scotland on the market for over a year now – there are expectations of an announcement on this issue in the near future.

The joint ventures between the oil companies and the multiples has been steady over the past year with no significant change.

Market shares and brands

The Rontec acquisition of Total in 2011 started a chain of activity and it's still continuing today. Rontec acquired around 490 former Total company-owned sites and immediately sold on some 253 of them to Shell for a reported £240m. These sites are now going through a major rebranding exercise to Shell, which should be finished later this year. Expect to see a good number of these sites appear with the Shell own-branded food operation under the 'deli2go' brand. Following the recent sale by Rontec of 19 sites to Sainsbury's, it is expected that a significant number of the balance of the former Total company sites (220) will be eventually sold off to a range of the larger dealer groups around the UK. Any remaining sites may then be merged into the existing Snax 24 dealer network.

The dealer supply to more than 300 former Total supplied sites was also sold on immediately to GB Oils – a subsidiary of the Ireland-based consortium DCC Energy. The depots, distribution and commercial assets were also transferred to GB Oils for a reported £67m.

The Total brand will eventually disappear from the UK but in the interim, sites will be allowed to continue to use it for a period of about three years. GB Oils will continue to use the Gulf brand as its primary forecourt branding, and in 2011 it also acquired the Pace brand to add to its stable as a secondary brand. We saw Gulf as the brand with the largest gain over the past year – adding almost 100 sites to its network.

Elsewhere, Harvest Energy added more than 50 dealers to its UK network and Murco (+25), Solo (+18) and Star (+16) had the biggest gains over the past year. The biggest losers on the other hand were Jet, as expected, (-48), Shell (-37) and Esso (-32).

The unbranded sites continued to take a hit last year with the loss of 88 sites down to just over 700 and they remain most vulnerable to the continued squeeze on margins, as well as to the pressures on the environmental factors surrounding forecourt operation.

In the dealer sector Texaco has held on to most of its sites (only eight down on the previous year), and it is still the major supplier with 875 dealer sites. It is very closely followed in second place by BP with 869, an increase of six, and in third by GB Oils under its various guises with 723 sites.

Overall these changes will eventually mean that there will be three UK forecourt brands with more than 1,000 sites each – BP, Shell and GB Oils (under its various guises). However, the multiple retailers (hypermarkets) group with a similar number of sites will still be leading the way with 39% of the UK retail market fuel volume and we still have Tesco going into its second year as the number-one fuel retailer with 15.5% volume share.

Forecourt shops

Overall the forecourt shop sector has continued to top £4.3bn sales per year in the UK.

Similar to last year, in the dealer market shop sales are more than £2bn per year (47% of the forecourt shop sales sector) with the average dealer forecourt shop of 63sq metres now turning over £435,000 a year. Within the dealer sector 84% of sites have a shop and 21% of the sites (1,104) now have a full c-store.

As expected the number of sites with alcohol licences and ATM machines has continued to grow, with 44% of dealer sites now having an ATM and 37% of dealers holding an alcohol licence.

Other changes

In addition to changes in the network over the past year we have seen some significant personnel changes. Patrick Hudson, who has looked after the Jet dealers for more than 25 years said goodbye, and we say hello again to Ramsay MacDonald, who was with BP for many years before disappearing and resurfacing earlier this year as the new retail supremo for GB Oils. In addition we have the gamekeepers-turned-poachers Jeremy Clarke and Jim Mulheran who have moved from running Murco's retail operation to heading up the Motor Fuel Group, the large dealer group recently acquired by private equity from Sailesh Sejpal and Sharad Raja.

And finally truth is sometimes stranger than fiction as we have just seen two old forecourts being designated by English Heritage as listed buildings – Markham Moor on the A1 and Red Hill in Leicestershire. They don't make them like that any more!

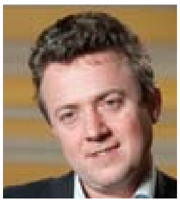
Welcome to this year's Fuel Market Review – a listing, in site number order, of the main fuel suppliers and distributors in the petrol retailing market, as well as the key supermarket players. The information has been compiled from questionnaires completed by the relevant companies. The tables at the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

Fuel Brand	BP	Shell	Esso
Company Name	BP Oil UK	Shell Oil Products Ltd	Esso Petroleum Company Ltd
Address	Witan Gate House, Witan Gate Milton Keynes MK9 1ES	Rourke House, Waterman's Business Park, Staines TW18 3BA	ExxonMobil House, Ermyn Way, Leatherhead, Surrey KT22 8UX
Telephone	01908 853000	01784 897800	01372 222000
Email	careline@bp.com	www.shell.co.uk/tellshell	n/a
Website	www.bp.com/uk	www.shell.co.uk	www.exxonmobil.co.uk
Head of retail	David Newton/Neale Smither	Melanie Lane	Karen Dickens
Number of supplied sites	1,175	900	875
Number of branded sites	1,175	900	875
Number of dealers	875	300	293
Number of co-owned sites	300	600	582
Co-owned (direct managed)	220	580	342
Co-owned (franchisee/com-op)	Franchise, dealer operated	20 dealer managed	198 alliance, 13 motorway, 28 agency
Areas of operation	UK	England, Scotland, Wales	UK
Fuels supplied (Bio/Premium/LPG)	UL, diesel, Ultimate UL, Ultimate diesel, LPG	V-Power UL & diesel, Fuelsave UL & diesel	Energy supreme, Energy UL, Energy diesel
Forecourt shop format/brand	350 BP Connect/Express	Deli2go, Shell Shop, Select	108 On the Run, 234 Snack Shop
Tie-ups with other major brands	142 M&S Simply Food, 310 Wild Bean Café	Costa Coffee	198 Tesco Express, 87 Costa Coffee
Major promotions/loyalty scheme	Nectar	Shell Drivers' Club*	Driver Cash Rewards (motorways only)
Number of car washes	612 car wash, 511 jet wash	260	237
Number of sites with LPG	208	200	•
Outside payment terminals	•	•	51
Sites with alcohol licences	654	130	415
Sites with ATMs	600	250	388
Any other comments	Neale Smither says BP remains fully committed to growing its retail presence in the UK market, with leading offers in fuel, convenience and loyalty.	* Shell Drivers' Club operates with redemption partners Avios and Waitrose.	

Fuel Brand	Texaco	Gulf	Tesco
Company Name	Valero Energy Ltd	Gulf Retail (GB Oils)	Tesco Petrol Filling Station
Address	7th Floor, 11 Old Jewry London EC2R 8DU	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG	New Tesco House, Delamare Road, Cheshunt, Hertfordshire EN8 9SL
Telephone	020 7513 3000	0845 456 6300	0800 505555
Email	ukirelandcustomercare@valero.com	retail@gulfretail.co.uk	customer.services@uk.tesco.com
Website	valero.com; texaco.co.uk;starrewards.co.uk	www.gulfoil.co.uk	www.tesco.com/petrolstation
Head of retail	Andrew Cox	Ramsay MacDonald	Peter Cattell
Number of supplied sites	715	574	512 (including 19 with Tesco Express stores)
Number of branded sites	814 (incl 99 authorised distributor sites)	574	512
Number of dealers	710	574	•
Number of co-owned sites	5	•	•
Co-owned (direct managed)	•	•	•
Co-owned (franchisee/com-op)	Dealer operated	•	•
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, Momentum99, AdBlue
Forecourt shop format/brand	•	480	<500sq ft kiosk on 462 sites; 19 Tesco Express
Tie-ups with other major brands	•	Costa, Londis, Spar, Mace	Costa Coffee, Krispy Kreme
Major promotions/loyalty scheme	Star Rewards	Gulf account card, Total fuel card	Tesco Clubcard, regular fuel price promotions
Number of car washes	•	187	124 jet wash, 167 rollover, 27 conveyor, 166 hand wash
Number of sites with LPG	1	45	•
Outside payment terminals	•	36	100% of network
Sites with alcohol licences	•	103	•
Sites with ATMs	•	70	57
Any other comments	Valero says it has the largest independent retail network in the UK and is focused on continuing to grow its share of the dealer market.	All of the above information incorporates the network of Total-branded dealers. GB Oils plans to invest in its infrastructure and expand its operations.	Operates 198 Tesco Express stores on Esso sites; 82% of the network provides fuel 24-hours a day; kiosk products are sold at the same price as the main store.

"BP remains fully committed to growing its retail presence in the UK market, with leading offers in fuel, convenience and loyalty"

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



Fuel Brand	Murco	UK/Texaco/Scottish Fuels/Regent/Carlton	Jet
Company Name	Murco Petroleum Ltd,	GB Oils	ConocoPhillips Ltd
Address	4 Beaconsfield Road, St Albans, Hertfordshire AL1 3RH	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG	2 Kingmaker Court, Warwick Technology Park, Warwick CV34 6DB
Telephone	01727 892400	01925 858500	01926 404000
Email	murco_uk@murphyoilcorp.com	info@gb-oils.co.uk	retailer.dealeradmin@p66.com
Website	www.murco.co.uk	www.gb-oils.co.uk	www.jetlocal.co.uk/www.phillips66.co.uk
Head of retail	Jamie Goodfellow	Ramsay MacDonald	Lindsey Grant/Guy Pulham
Number of supplied sites	457	367	350
Number of branded sites	457	179	350
Number of dealers	224	367	350
Number of co-owned sites	233	•	•
Co-owned (direct managed)	•	•	•
Co-owned (franchisee/com-op)	233 com-op	•	•
Areas of operation	England, Scotland, Wales	UK	Scotland, parts of England*
Fuels supplied (Bio/Premium/LPG)	Super UL, premium UL, low sulphur diesel	UL, diesel, premium UL & diesel, Flogas	Diesel, UL, super UL
Forecourt shop format/brand	Costcutter, Costcutter Express, Checkout/ShopStop	•	•
Tie-ups with other major brands	30 Costcutter, 200 Express, 3 Checkout/ShopStop	•	•
Major promotions/loyalty scheme	Shop-based Costcutter promotions	Leading industry provider of fuel cards	Fuelling the Local Community; Aim4Success**
Number of car washes	177 jet wash, 99 rollover	•	•
Number of sites with LPG	9	•	•
Outside payment terminals	•	•	•
Sites with alcohol licences	213	•	•
Sites with ATMs	148	•	•
Any other comments	Murco is actively looking to recruit new dealers to its brand.		*Operates in Scotland, North East, Yorkshire, Midlands, South East, East Anglia, Humberside. **Also runs Merlin '2 for 1' offers.

Fuel Brand	Morrisons	Sainsbury's	Co-operative Food*
Company Name	Wm Morrisons 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	301	266	219
Number of branded sites	301	266	219
Number of dealers	•	•	•
Number of co-owned sites	301	266	219
Co-owned (direct managed)	301	266	219
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	England, Wales	UK	UK
Fuels supplied (Bio/Premium/LPG)	UL, diesel, LPG	UL, super UL, diesel, LPG	All retail grades
Forecourt shop format/brand	301	263	219 Co-operative Food
Tie-ups with other major brands	•	Coffee offer on 21 sites	•
Major promotions/loyalty scheme	Morrisons Miles	Nectar	Co-operative membership
Number of car washes	189 jet wash, 263 car wash	178 car wash, 70 jet wash	170
Number of sites with LPG	64	6	25
Outside payment terminals	1,870	10	•
Sites with alcohol licences	•	170	165
Sites with ATMs	•	26	180
Any other comments			*Co-operative petrol stations sell fuel under BP, Esso, Texaco, Total, Gulf and Flogas brands.

"The landscape has changed significantly over the past year and further change is inevitable. The one certainty is that GB Oils will further invest in its infrastructure and expand its operations"

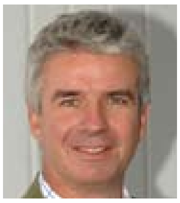
Ramsay MacDonald, director of retail, GB Oils

Fuel Brand	Asda	Pace	Harvest Energy
Company Name	Asda	Pace Fuelcare Ltd	Harvest Energy Ltd
Address	Asda House Southbank, Great Wilson Street, Leeds LS11 5AD	Hannover House, 18 The Avenue, Egham, Surrey TW20 9AB	2 Cavendish Square, London W1G 0PU
Telephone	01132 435435	01784 484460	020 7580 0033
Email	jeremy.walton@asda.co.uk	enquiries@pacefuelcare.co.uk	retail@harvestenergy.co.uk
Website	www.asda.com	www.pacefuelcare.co.uk	www.harvestenergy.co.uk
Head of retail	Jeremy Walton	Ramsay MacDonald	Simon Davis
Number of supplied sites	196	130	119
Number of branded sites	196	130	92
Number of dealers	•	130	119
Number of co-owned sites	196	•	•
Co-owned (direct managed)	196	•	•
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	UK	UK	England, Scotland, Wales
Fuels supplied (Bio/Premium/LPG)	UL, diesel, LPG	UL, diesel, premium UL & diesel, Flogas	UL, super UL, diesel
Forecourt shop format/brand	27	90	•
Tie-ups with other major brands	•	Londis, Premier, Mace	•
Major promotions/loyalty scheme	•	Pace account card	•
Number of car washes	34 rollover	24	•
Number of sites with LPG	14	5	•
Outside payment terminals	974	2	•
Sites with alcohol licences	•	30	•
Sites with ATMs	•	15	•
Any other comments		The acquisition of Pace by GB Oils was completed in September 2011.	Actively looking to recruit independent retailers to both the Harvest Energy brand and on a supply-only basis across England, Scotland and Wales.

Fuel Brand	Maxol	Rix	Gleaner
Company Name	Maxol Oil Ltd	Rix Petroleum	Gleaner Oils Ltd
Address	48 Trench Road, Mallusk, Newtownabbey BT36 4TY	Witham House, Spyvee Street, Hull HU8 7JR	Milnfield, Elgin, Morayshire IV30 1UU
Telephone	028 9050 6000	01482 838383	01343 557400
Email	post@maxol.ie	duncan.lambert@rix.co.uk	oilandgas@gleaner.co.uk
Website	www.maxol.ie	www.rix.co.uk	www.gleaner.co.uk
Head of retail	Brian Donaldson	Duncan Lambert	David Todd
Number of supplied sites	97	81	72
Number of branded sites	97	80	69
Number of dealers	69	79	57
Number of co-owned sites	28	2	9
Co-owned (direct managed)	•	1	9
Co-owned (franchisee/com-op)	27 licence agreement, one unmanned	1	•
Areas of operation	Northern Ireland and Ireland	Yorks, Lincs, Central England, E Scotland, E Anglia	NE Scotland, Highlands, West Highlands & Islands
Fuels supplied (Bio/Premium/LPG)	UL, diesel, limited super UL	UL, diesel	UL, diesel, biodiesel, bioethanol, LPG
Forecourt shop format/brand	24 Spar, 3 own-brand, Auto24 on unmanned site	2	50
Tie-ups with other major brands	Tim Horton, The Streat, Bewleys, Piachetto, Nescafé	•	9
Major promotions/loyalty scheme	Forecourt and shop promotions	•	•
Number of car washes	14 rollover & 15 jet wash at co-owned sites	1	32 jet wash
Number of sites with LPG	•	•	27
Outside payment terminals	6 at co-owned sites	2	•
Sites with alcohol licences	•	2	28
Sites with ATMs	•	2	4
Any other comments	Figures are for NI only. Maxol is planning to extend its company-owned network and is actively seeking new dealers.	Rix says it continues to be one of the leading brands of choice for rural forecourt owners. It offers dedicated support from an account manager.	At the time of going to press, Gleaner Oils was on the market.

"Valero is 100% focused on the dealer market. Our focus going forward continues to be on growing our share of the dealer market"

Andrew Cox, UK marketing manager, Valero



Fuel Brand	Texaco/Murco/NWF/Dragon/Lincolnshire	BWOC	Pace
Company Name	NWF Fuels	BWOC Ltd	Tate Fuel Oils
Address	Wardle, Nantwich, Cheshire CW5 6AF	BW Estate, Oldmixon Crescent, Weston-super-Mare, Somerset BS24 9BA	Leeds Road, Otley, West Yorkshire LS21 3BB
Telephone	01829 260900	01934 417576	01943 467444
Email		amy.davis@bwoc.co.uk	sales@tate-fuels.co.uk
Website	www.nwffuels.co.uk	www.bwoc.co.uk	www.tateoil.co.uk
Head of retail	Len Hamilton	Amy Davis	Andrew Tate
Number of supplied sites	52	51	50
Number of branded sites	52	22	13
Number of dealers	52	29	11
Number of co-owned sites	•	1	2
Co-owned (direct managed)	•	1	2
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	England, Wales	Nationwide	North England
Fuels supplied (Bio/Premium/LPG)	UL, super UL, diesel, kerosene	Diesel, UL, super UL	UL, diesel, super UL, gas oil, kerosene
Forecourt shop format/brand	36	•	•
Tie-ups with other major brands	Spar, Costcutter, Mace, Londis, Premier, Nisa	Mace on co-owned site	•
Major promotions/loyalty scheme	Texaco Star Rewards	•	•
Number of car washes	22	•	4 jet wash
Number of sites with LPG	2	1	•
Outside payment terminals	2	•	•
Sites with alcohol licences	30	•	•
Sites with ATMs	30	•	•
Any other comments	Any dealer operating a privately-owned site and interested in a Texaco, Murco, Dragon, Lincs or NWF branded package should call Len Hamilton on 07702 874241.		The company says it is actively seeking dealers to join its growing network.

Fuel Brand	Topaz	Oil 4 Wales	Total
Company Name	Topaz Energy	Oil 4 Wales	Ellan Vannin Fuels Ltd
Address	Beechhill, Clonskeagh, Dublin 4, Ireland	Nantycaws Service Station, Nantycaws, Carmarthen SA32 8BG	Mill Road, Peel, Isle of Man IM5 1TB
Telephone	+353 1 202 8888	01267 275777	01624 844000
Email	info@topaz.ie		info@evf.co.im
Website	www.topaz.ie	www.oil4wales.co.uk	www.evf.co.im
Head of retail	Jonathan Diver	Colin Owens	Andy Sweetman
Number of supplied sites	29	16	11
Number of branded sites	29	16	11
Number of dealers	28	16	5
Number of co-owned sites	1	•	5
Co-owned (direct managed)	1	•	4
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	Ireland and Northern Ireland	Wales	Isle of Man
Fuels supplied (Bio/Premium/LPG)	UL, bio petrol, diesel, bio diesel, gas oil	UL, diesel, super UL	Excellium UL, UL, diesel
Forecourt shop format/brand	•	15	Total and dealer-owned brands
Tie-ups with other major brands	•	Informal agreement with Londis	Mace on some dealer sites
Major promotions/loyalty scheme	•	Monthly raffle for fuel	•
Number of car washes	8	10	3 car wash, 4 jet wash
Number of sites with LPG	•	2	•
Outside payment terminals	1	•	•
Sites with alcohol licences	3	6	3
Sites with ATMs	13	3	3
Any other comments	All figures are for Topaz sites in Northern Ireland only.	Oil 4 Wales aims to be the national oil brand for Wales. Its services include interest-free budget accounts, planned deliveries, fuel cards and Harlequin oil tanks.	

Fuel Brand	Manx Petroleum
Company Name	Manx Petroleums Ltd
Address	PO Box 47, Battery Pier, Douglas, Isle of Man IM99 1DE
Telephone	01624 691691
Email	info@manxpetroleums.co.im
Website	www.manxpetroleums.co.im
Head of retail	David Kay/Judith Thomson
Number of supplied sites	8
Number of branded sites	8
Number of dealers	6
Number of co-owned sites	•
Co-owned (direct managed)	•
Co-owned (franchisee/com-op)	•
Areas of operation	Isle of Man
Fuels supplied (Bio/Premium/LPG)	Premium UL, super UL, diesel, gas oil, LPG
Forecourt shop format/brand	8
Tie-ups with other major brands	3 Spar
Major promotions/loyalty scheme	•
Number of car washes	5 rollover, 6 jet wash
Number of sites with LPG	1
Outside payment terminals	1
Sites with alcohol licences	2
Sites with ATMs	6
Any other comments	Manx Petroleum is the Isle of Man's leading fuel distributor and the company is looking to invest for the long-term future.

SHARE BRAND OWNERSHIP 2012 Data supplied by Experian Catalist

SHARE BRAND 2012	COMPANY	DEALER	HYPERMARKET	TOTAL	SHOPS	CAR WASH	LPG	ATM	ALCOHOL
ASDA	•	•	195	195	32	94	14	2	1
BP	306	869	•	1,175	1,159	731	210	925	691
ESSO	581	286	•	867	859	360	20	621	532
FOOD STORE	•	48	15	63	62	29	5	33	18
GB OILS	476	723	•	1,199	1,022	585	75	412	417
GLEANER	8	60	•	68	52	35	20	6	20
HARVEST ENERGY	•	83	•	83	82	40	10	32	38
JET	•	327	•	327	326	206	31	179	136
MAXOL	28	73	•	101	97	66	8	69	21
MINOR BRAND	36	295	•	331	260	127	23	88	78
MORRISONS	•	•	301	301	298	279	65	2	3
MURCO	189	248	•	437	419	236	27	179	250
RIX	•	41	•	41	22	7	2	5	5
RONTEC	•	294	•	294	288	183	34	153	107
SAINSBURYS	•	•	265	265	256	195	8	34	143
SHELL	589	250	•	839	820	433	213	519	186
TESCO	•	•	492	492	464	247	4	79	29
TEXACO	•	875	•	875	853	521	85	542	474
TOPAZ	•	22	•	22	22	11	2	17	8
UNBRANDED	•	702	•	702	491	141	55	73	114
UK TOTAL	2,213	5,196	1,268	8,677	7,884	4,526	911	3,970	3,271

NOTES: 1. All figures include Northern Ireland; 2. Share Brand definitions are as previous years. Food Store includes brands such as Spar, Waitrose and other minor branded stores; 3. Shop figures include everything above kiosk level; 4. Car wash numbers include all types – jet wash, rollover and conveyor. Catalist UK database May 2012 (based on V1 2012 release) © *Experian Ltd 2012*

UK DEALER SITES 2012 – SHOP Data supplied by Experian Catalist

DEALER SITES SHARE BRAND	SITES BY BRAND	SHOP TYPE C-STORE	STANDARD	KIOSK	NONE	ALL SHOPS (C-ST/STD)	TOTAL SHOP AREA SQ M	SALES AREA AVERAGE SQ M	TOTAL SHOP SALES £'000	SALES VALUE AVERAGE £'000
BP	869	305	557	3	4	862	66,297	77	549,119	637
ESSO	286	71	210	2	3	281	18,576	66	139,590	497
FOOD STORE	48	28	20	0	0	48	3,700	77	27,710	577
GB OILS	723	47	410	96	170	457	19,426	43	111,126	243
GLEANER	60	5	32	7	16	37	1,554	42	6,136	166
HARVEST ENERGY	83	12	68	2	1	80	3,765	47	26,570	332
JET	327	35	287	4	0	322	16,136	50	124,962	388
MAXOL	73	50	19	2	2	69	6,242	90	67,585	979
MINOR BRAND	295	55	139	36	65	194	10,146	52	77,755	401
MURCO	248	33	177	20	18	210	10,184	48	60,233	287
RIX	41	3	12	7	19	15	736	49	4,565	304
RONTEC	294	68	219	3	4	287	19,079	66	135,846	473
SHELL	250	70	178	2	0	248	17,604	71	131,600	531
TEXACO	875	258	575	20	20	833	61,401	74	457,707	549
TOPAZ	22	13	9	0	0	22	1,705	78	13,400	609
UNBRANDED	702	51	359	90	202	410	18,344	45	85,042	207
UK DEALER TOTAL	5,196	1,104	3,271	294	524	4,375	274,895	63	2,018,946	461
	100%	21%	63%	6%	10%	84%				

UK DEALER SITES 2012 – CAR WASH Data supplied by Experian Catalist

DEALER SITES 2012	SITES	CAR WASH	JET WASH	AUTO WASH	CONVEYOR	MF PUMPS	AVERAGE MF PUMPS
BP	869	572	448	343	6	3,705	4.3
ESSO	286	194	155	95	3	1,171	4.1
FOOD STORE	48	18	17	3	0	131	2.7
GB OILS	723	184	176	29	2	2,061	2.9
GLEANER	60	27	27	0	0	146	2.4
HARVEST ENERGY	83	40	35	14	0	322	3.9
JET	327	206	172	97	2	1,299	4.0
MAXOL	73	46	45	12	0	236	3.3
MINOR BRAND	295	101	91	23	1	809	2.8
MURCO	248	82	77	21	0	784	3.2
RIX	41	7	7	0	0	105	2.6
RONTEC	294	183	139	105	1	1,118	3.8
SHELL	250	149	136	73	1	1,004	4.1
TEXACO	875	519	421	220	3	3,319	3.8
TOPAZ	22	11	11	2	0	78	3.5
UNBRANDED	702	141	137	11	0	1,708	2.5
UK DEALER TOTAL	5,196	2,480	2,094	1,048	19	17,996	3.5

NOTES: 1. All figures include Northern Ireland; 2. Share Brand definitions are as previous years. Food Store includes brands such as Spar, Waitrose and other minor branded stores. Catalist UK database May 2012 (based on V1 2012 release) © *Experian Ltd 2012*

> "Harvest Energy is actively looking to recruit independent retailers to both the Harvest Energy brand and on a supply-only basis across the whole of England, Scotland and Wales"

Simon Davis, head of sales & logistics, Harvest Energy

SITE NUMBERS BY BRAND 2012 Data supplied by Experian Catalist

BRAND	NUMBER OF SITES		
MAY	2010	2011	2012
3D	2	2	2
AMCO	1	1	1
ANGLIAN	1	1	•
ANGLO	5	5	5
APPLEGREEN	7	9	10
ARNDALE	1	•	•
ASDA	180	187	195
BATA	2	2	2
BATES & HUNT	5	5	4
BAXTER JOHNSTON	4	3	2
BECA	2	1	1
BFL	8	5	5
BP	1174	1169	1175
BROADLAND FUELS	1	1	3
BROBOT	1	1	1
BUTLER	21	18	15
BWOC	21	21	20
CALLOW	3	3	3
CARLTON	20	15	8
CENTRA	5	4	4
CGP	1	1	•
CLUB	5	4	3
COOKE	3	3	4
CO-OP	15	19	1
COSTCUTTER	6	6	6
CPL	•	2	2
CRANSTON FUELS	1	1	1
DAY TODAY	4	4	2
DEANS	1	1	1
DEV OIL	1	1	•
DISCOUNT FUELS	1	1	1
DRAGON	10	9	9
EGAM	1	1	•
ELF	4	1	•
EMO	•	9	9
EP	2	1	1
ESSO	890	899	867
EURO OIL	1	1	1
EUROPA	1	•	•
EVESONS	1	1	1
EVOCO	1	1	•
EXPRESS	4	3	2
FLARE	13	9	7
GB	10	8	8
GLEANER	71	72	68
GLENDALE	1	1	•
GLOBE	1	1	1
GO	12	14	17
GULF	172	212	305
HARVEST ENERGY	9	30	83
HAVEN	1	1	1
HELTOR	5	5	6
HIGHLAND	14	2	11
HILLSIDE	1	1	1
HT	1	1	1
IMPERIAL	12	12	11
JB FUELS	1	1	•
JET	359	375	327
JET(EMO)	17	7	8
K9	1	1	1
KELTIC	2	2	3
KEYFUELS	1	•	•
KP	1	1	1
LINCOLNSHIRE FUELS	1	1	3
LOCAL	1	1	1
LONDIS	2	2	2
MACE	4	3	4
MAJOR	1	1	1
MALJEE	5	4	3
MANX	•	8	8
MARTINDALES	4	2	1
MAXOL	96	99	101
MFS	1	1	1
MINSTER	2	2	2
MITCHELL & WEBBER	2	2	1
MOCO	1	1	1
MORRISONS	292	295	301
MURCO	397	411	436
MURPHY	1	•	•
NATIONAL	22	21	14
NISA	2	5	3
NORTHERN ENERGY	1	1	2
NWF	9	7	7
OAK	11	7	7
OIL4WALES	•	•	9
ONE	12	10	7
ONE STOP	1	•	•
PACE	135	144	135
PARK & SHOP	6	6	3
PEVA	1	1	1
PHOENIX	2	2	2
POWER	80	72	73
PRAX	•	•	3
PRIMA	1	1	•
PRINCE	2	2	2
PROTEUS	30	17	11
QUALITY	•	•	1
RANGEHILL	1	1	1
RED ROSE	1	1	•
REGENCY OILS	6	6	6
REGENT	38	22	23
REPSOL	2	2	1
RIX	53	44	41
SAINSBURYS	255	262	265
SAVE	2	1	•
SCOTTISH FUELS	32	27	23
SEVERN FUELS	1	1	1
SHELL	925	876	839
SHOP LOCAL	1	1	1
SMILE	2	2	•
SOLO	4	5	23
SOMERFIELD	15	13	•
SOUTHERN COUNTIES	1	1	•
SPAR	12	13	11
SPOT	9	8	7
SPUR	2	2	2
STAR	8	16	32
TATE	5	4	4
TEAM SPIRIT	2	1	•
TESCO	270	284	292
TESCO EXPRESS	18	19	19
TESCO EXTRA	163	173	181
TEXACO	992	861	852
THAMES	44	40	35
THRUST	6	6	6
TODAY'S EXTRA	•	•	1
TOP	6	6	10
TOPAZ	16	18	22
TORQ	•	•	12
TOTAL	813	823	770
UK	111	107	95
UNBRANDED	748	734	663
UNITED	9	6	7
VIVO	9	8	9
WAITROSE	14	14	14
WATSON	1	1	1
WCF	34	32	31
XL STOP & SHOP	6	6	5
TOTAL MAY 2010	8,884	8,765	8,677