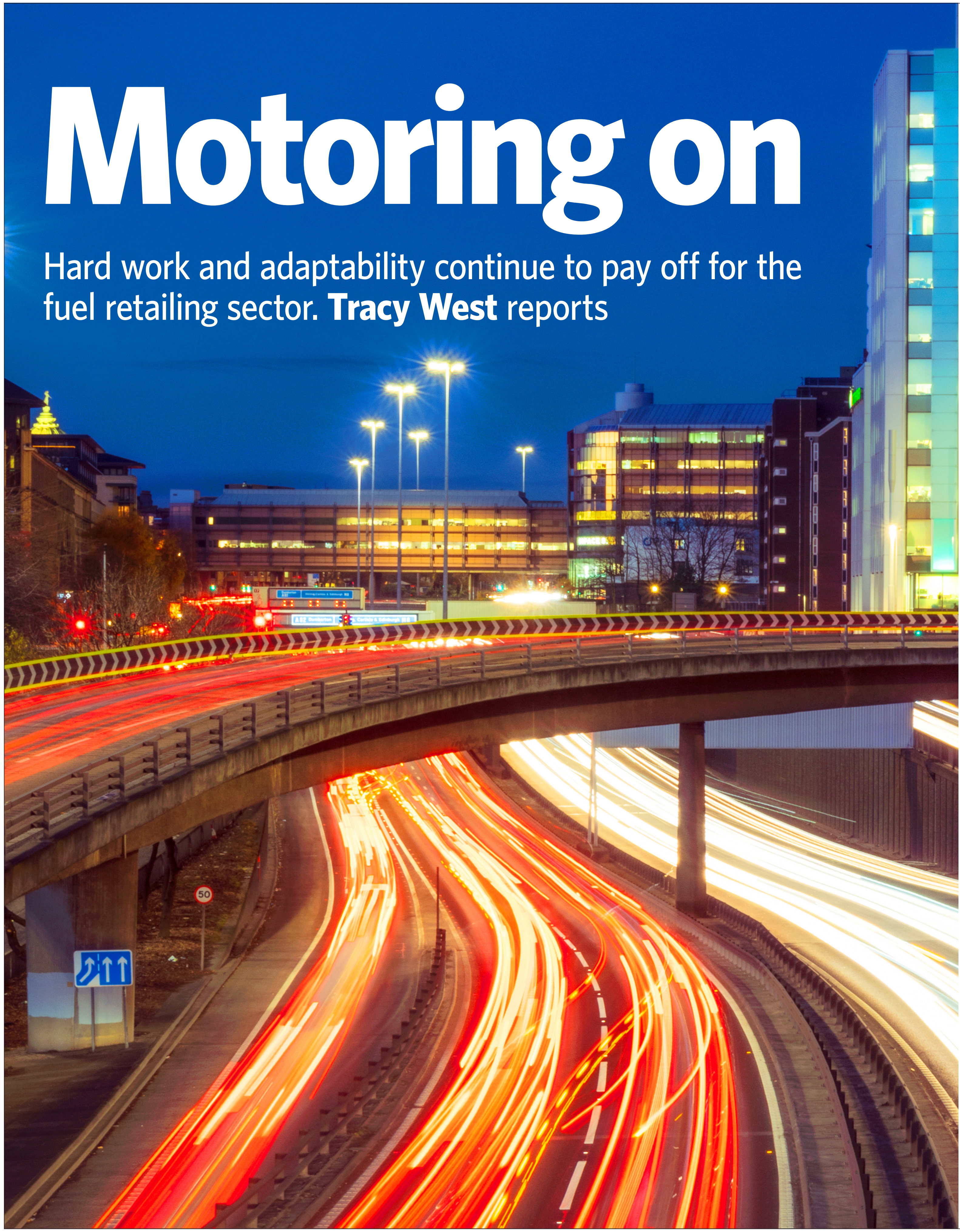
Motoring on

Hard work and adaptability continue to pay off for the fuel retailing sector. **Tracy West** reports



"Valero's approach to doing business is to put the customer first. Our customers benefit from a first-class service from Valero's area managers, along with highly competitive offers and security of supply from Pembroke Refinery. This approach means that Valero are now supplying more retail locations in the UK than ever before!"

Adele Shackleton, Valero director sales and marketing

The strength of the UK's fuel retailing sector knows no bounds, but is probably best reflected in the latest data from Experian, which reveals that the number of locations where drivers can fill up with fuel is now 8,354. The number is down on last year – by 26 – but the fact there are still more than 8,000 fuel forecourts is a great achievement, given all that is going on in the world. In recent times, big issues such as Covid, war in Ukraine, as well as rising inflation and energy costs have served to intensify the normal competitive pressures and trends as well as the bigger headache – the looming transition to electric vehicles and Net Zero.

Resilience is a word that is often used to describe the sector and rightly so. The dictionary definition is: the capacity to recover quickly from difficulties; and that is exactly what fuel retailers have done since the arrival of supermarkets onto their patch in the '90s, seriously eroding fuel margins, and leading to site losses of up to 1,500 a year.

The development of forecourt shops is a case in point, with many now far superior to standalone convenience stores in terms of size, design, range, customer care and additional services. Many operators are also taking advantage of the recent decline in the number of illegal hand car wash operations to re-invest in valeting, some with impressive multiple washing offers.

Meanwhile, Experian data shows that while company-owned site numbers were up by 15, hypermarkets were down by two and dealers by 39. These are likely smaller, and older dealer sites that have outlived their purpose and are unsuitable for redevelopment with today's requirment for spacious, modern convenience forecourts. However, dealers still dominate the market in terms of ownership, accounting for 5,326 sites compared to the hypermarket sector owning 1,507 and oil companies accounting for the remaining 1,521 sites.

INVESTMENT

Despite the drop in the number of dealer sites, there remains great activity within the market with acquisitions, knockdown rebuilds, new-to-industry sites and investment in existing sites.

When the Top 50 Indies report was published earlier this year, it revealed that the total site numbers in the listing continued to grow – up from 2,511 in 2022 to 2,560, a net gain of 49.

The table entitled Big 4 Dealer Groups shows MFG with a drop in sites from 921 last year to 861 this year. This is due to the CMA-imposed dispersal of sites thanks to its owner CD&R (Clayton, Dubilier & Rice) taking over Morrisons.

UK Fuel Market by Brand 2023

	NO OF OUTLETS	AV VOLUME* (kl pa)	% SHARE Market	% SHARE Outlet	MARKET Effectiveness
TOTAL	**8,354**	**4,493**	**100**	**100**	**1.00**
Tesco	512	11,370	15.50	6.10	2.53
Shell	1,160	4,634	14.30	13.90	1.03
BP	1,171	4,421	13.80	14.00	0.98
Esso	1,219	3,873	12.60	14.60	0.86
Sainsburys	315	11,823	9.90	3.80	2.64
Morrisons	340	10,527	9.50	4.10	2.34
Asda	333	8,625	7.60	4.00	1.92
Texaco	737	2,534	5.00	8.80	0.56
Certas energy	658	1,296	2.30	7.90	0.29
Jet	301	2,589	2.10	3.60	0.58
Applegreen	145	4,708	1.80	1.70	1.05
Co-Op	134	4,160	1.50	1.60	0.93
Minor brand	177	1,701	0.80	2.10	0.38
Unbranded	475	544	0.70	5.70	0.12
Total energies	98	2,336	0.60	1.20	0.52
Murco	170	1,274	0.60	2.00	0.28
Maxol	102	1,566	0.40	1.20	0.35
Essar	67	1,622	0.30	0.80	0.36
Circle K	44	1,605	0.20	0.50	0.36
Solo	63	823	0.10	0.80	0.18
Go	29	1,639	0.10	0.30	0.35
Gleaner	48	811	0.10	0.60	0.18
Thames	24	735	0.00	0.30	0.16
Star	18	892	0.00	0.20	0.20
Rix	14	556	0.00	0.20	0.12

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UK Fuel Market 2023 vs 2022

OWNERSHIP	NUMBER OF OUTLETS 2023	NUMBER OF OUTLETS 2022	NET CHANGE Year on Year
UK TOTAL	**8,354**	**8,380**	**-26**
Hypermarket	1,507	1,509	-2
Dealer	5,326	5,365	-39
Company	1,521	1,506	15

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UK Fuel Market by Ownership 2023

OWNERSHIP	NO OF OUTLETS	FUEL				+ FCT SHOP	+ CAR WASH
		Av Volume* (kl pa)	Market Share %	Outlet Share %	Market Effectiveness	%	%
TOTAL	**8,354**	**4,493**	**100**	**100**	**1.00**	**88%**	**46%**
Hypermarket	1,507	10,690	42.90	18.00	2.38	78%	59%
Dealer	5,326	2,634	37.40	63.80	0.59	90%	43%
Company	1,521	4,866	19.70	18.20	1.08	95%	41%

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UK Fuelling Locations 2023

	ALL UK	RETAIL SITES	NON-RETAIL SITES
Petrol/Diesel	8,535	8,346	189
Hydrogen	12	0	12
Cng/Lng	25	6	19
Auto Lpg	672	666	6
***UK EV Charging Locations**	24,909	346	•

*Zap-Map May 2023 www.zap-map.com © Experian Limited 2023

"Esso remains focused on the needs of today's motorist, with an expanded range of high-quality fuels that provide the consumer with increased clarity and choice."

Patrick Rutherford, Esso UK retail sales manager

UK Forecourt Shop Market by Fuel Brand 2023

	NO OF FCT SHOPS	AV SALES (£k pa)	AV SALES (£000) per sq m	AV SALES (£) per '000litres	AV SIZE sq metres	SHARE % Market	SHARE % Outlet	MARKET Effectiveness
TOTAL	**7,395**	**663**	**8.4**	**143**	**79**	**100%**	**100%**	**1.0**
Applegreen	145	667	8.1	142	82	2.0%	2.0%	1.01
Asda	64	703	7.6	87	92	0.9%	0.9%	1.06
BP	1169	854	7.9	193	108	20.3%	15.8%	1.29
Certas Energy	436	341	6.6	211	51	3.0%	5.9%	0.51
Circle K	44	1031	9.4	642	110	0.9%	0.6%	1.55
Co-Op	132	1768	9.9	424	179	4.8%	1.8%	2.67
Essar	62	331	5.8	196	57	0.4%	0.8%	0.50
Esso	1218	900	9.8	232	92	22.3%	16.5%	1.35
Gleaner	31	187	4.5	182	41	0.1%	0.4%	0.28
Go	17	788	5.5	453	143	0.3%	0.2%	1.19
Jet	297	411	6.9	158	59	2.5%	4.0%	0.62
Maxol	91	871	8.2	537	106	1.6%	1.2%	1.31
Minor Brand	93	331	6.0	288	55	0.6%	1.3%	0.50
Morrisons	335	409	10.0	39	41	2.8%	4.5%	0.62
Murco	146	337	6.2	243	54	1.0%	2.0%	0.51
Rix	7	113	4.8	143	24	0.0%	0.1%	0.17
Sainsburys	299	591	8.8	49	67	3.6%	4.0%	0.89
Shell	1158	686	8.3	148	82	16.2%	15.7%	1.03
Solo	54	430	7.2	525	59	0.5%	0.7%	0.65
Star	18	667	9.9	748	68	0.2%	0.2%	1.01
Tesco	491	499	10.8	43	46	5.0%	6.6%	0.75
Texaco	732	589	7.6	232	77	8.8%	9.9%	0.89
Thames	16	144	5.0	155	29	0.0%	0.2%	0.22
Total Energies	90	481	8.4	201	57	0.9%	1.2%	0.72
Unbranded	250	247	5.5	337	45	1.3%	3.4%	0.37

© Experian Limited 2023

UK Forecourt Shop Market by Ownership 2023

	NO OF FCT SHOPS	AV SALES (£k pa)	AV SALES (£000) per sq m	AV SALES (£) per '000litres	AV SIZE sq metres	SHARE % Market	SHARE % Outlet	MARKET Effectiveness
TOTAL	**7395**	**663**	**8.4**	**143**	**79**	**100%**	**100%**	**1.0**
Dealer	4,770	573	7.7	199	74	55.7%	64.5%	0.86
Company	1,447	1,099	9.4	218	117	32.4%	19.6%	1.65
Hypermarket	1,178	499	9.7	44	52	12.0%	15.9%	0.75

Tables above: C-stores and standard shops included – excludes kiosks **© Experian Limited 2023**

UK Forecourt Shop Market by Type 2023

	NO OF FCT SHOPS	AV SALES (£k pa)	AV SIZE (sq m)	SHARE % Market	SHARE % Outlet	MARKET Effectiveness
TOTAL	**8,354**	**650**	**78**	**100%**	**100%**	**1.00**
C-Store	2,764	1,152	141	64.8%	33.1%	1.96
Standard	4,631	373	42	35.1%	55.4%	0.63
Kiosk	160	33	12	0.1%	1.9%	0.06
No shop	799	•	•	•	•	•

Shops include kiosks **© Experian Limited 2023**

Next year's figures – for dealer sites within the Fuel Market Review and for site numbers in the Top 50 – will look dramatically different due to EG Group's agreement to sell the majority of its forecourts to Asda.

In a deal that's expected to complete by the end of this year, Asda will operate 600 supermarkets, 700 forecourts and 100 convenience stores. EG Group will operate just 30 sites including its first-ever site in Bury.

There have been calls for the CMA to investigate the deal but that is thought unlikely to happen as it already considers Asda and EG Group as one business because of their shared ownership.

And, of course, Asda snapped up Co-op's forecourts last year and has since come to an agreement with the CMA to sell 13 of the 132 sites. Head of petrol trading and operations at Asda, Dave Tyrer told Forecourt Trader that the 119 sites that it will keep will continue to trade as Co-ops until they are converted – hopefully later this year.

POLE POSITION

Esso has overtaken BP to become the biggest brand in fuel retailing with its pole sign appearing on 1,219 sites, with BP at 1,171 and then Shell with 1,160 sites. And it is Esso that is the dealers' choice with its presence on 1,019 dealer sites followed by BP on 849, then Texaco on 735.

But it is Tesco that remains the biggest fuel retailer with a 15.5% market share from its 512 sites. Its number of sites is down two on 2022 figures and its market share is down from 15.7%.

There have been switches in the number two and three positions, with Shell replacing BP at number two with 14.3% market share versus BP's 13.8%. And while Esso is biggest when it comes to the number of sites, it takes fourth position when it comes to volume, with a 12.6% share.

TOP OF THE SHOPS

There are 7,395 shops on the 8,354 forecourts in the UK which is down 10 on last year's figures. Dealers operate the most (4,770) followed by company-owned (1,447) then hypermarkets (1,178).

Londis has overtaken Spar to be the biggest fascia on the forecourt, with 1,155 sites versus Spar's 1,185. A recent coup for Londis was the signing of Top 50 Indie the Kay Group's 23 forecourt stores. However, Spar has the highest market share at 16.1% versus Londis' 12.6%. In third place, comes 'unbranded' shops. Some 779 forecourts stores are unbranded but this is down on 2022 figures when there were 832 unbranded shops.

It is interesting that there are still so many unbranded stores. Joining a symbol group is obviously not right for everyone but the access they can give you to marketing and promotional deals is paying off for many retailers who are keen to invest in the convenience side of the business.

In its 2022 Forecourt Report, the Association of Convenience Stores found that, on average £18,000 was spent on each forecourt store, compared with £10,000 spent by convenience stores that don't sell fuel. The most common form of investment was refrigeration, with stores either looking to expand their range of fresh and chilled goods or upgrade their refrigeration to make it more energy efficient.

WASH AND GROW

Car wash and valeting equipment suppliers are reporting a surge in interest for their kit as forecourt retailers re-engage with the market in a big way. However, Experian's data reveals that the number of sites with car washes is actually down from 5,364 last year to 5,325 this year. Some of the drop in overall site numbers may account for this, but some sites favour expanding only their stores – there may not be the market or the room for both. Jet washing is still the most prevalent type of equipment, followed by automated car washes.

Meanwhile at BP, Esso and Shell, the number of sites with car washes has dropped quite dramatically with BP closing 33 car washes and 26 jet washes; Esso closing 40 car washes and Shell closing 19.

ON THE ROAD

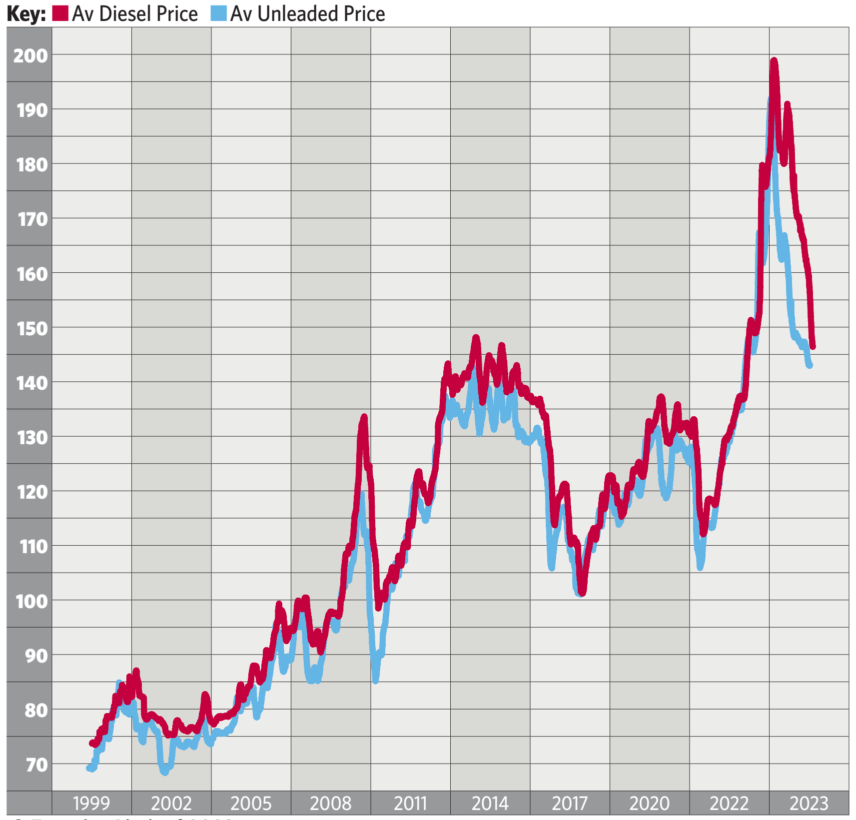
Good news for forecourt retailers is the fact that the number of cars in use on UK roads last year rose to 35.14m which is back to pre-pandemic levels. The overall number of vehicles on UK roads is 40.7m.

The numbers come from the Society of Motor Manufacturers and Traders' (SMMT) Motoparc data for 2022. It found that 58.6% of cars on the road are fuelled by petrol; 35.8% are diesels, 2.7% are hybrid electric; 1.9% are battery electric; and 1.2% are plug-in hybrids. The latest available data on new car registrations from SMMT (May 2023) found that petrol-powered cars remain Britain's best seller, accounting for just over 57% of all registrations. However, May 2023 saw battery electric vehicles (BEVs) become the UK's second most popular power train but with a much smaller market share of just shy of 17%. The SMMT reports that the range of BEV models available in Britain has quadrupled in the past five years – from 21 in 2018 to around 80 today.

One in 32 cars driving in Britain come with a plug, amounting to 1.08m vehicles. However, public charge-point roll- PAGE 11

UK Daily Average Prices 1999-23

Key: Av Diesel Price Av Unleaded Price



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Big 5 Dealer Groups

	SITE NUMBERS 2023	SITE NUMBERS 2022	NET CHANGE Year on Year
TOTAL	**1,799**	**1,853**	**-54**
Motor Fuel Group	861	921	-60
Euro Garages	390	385	5
Rontec	265	263	2
Applegreen*	153	154	-1
Co-Op Group	130	130	0

© Experian Limited 2023 *includes Welcome Break

UK Fuel & Shop Market 2023 – Distribution by Region

	OUTLETS Amount	OUTLETS %	FUEL VOLUME Av (kl pa)*	FUEL VOLUME %	SHOP SALES Av (£k pa)	SHOP SALES %
TOTAL	**8,354**	**100%**	**4,487**	**100%**	**588**	**100%**
South East	1,080	12.9%	5,338	15.4%	783	16.3%
North West	884	10.6%	4,974	11.7%	585	9.6%
East	793	9.5%	4,843	10.2%	688	10.1%
South West	816	9.8%	4,405	9.6%	643	9.6%
West Midlands	722	8.6%	4,802	9.2%	658	8.9%
Scotland	852	10.2%	3,830	8.7%	477	6.9%
Yorkshire And The Humber	667	8.0%	4,515	8.0%	575	7.1%
London	519	6.2%	5,618	7.7%	936	9.6%
East Midlands	617	7.4%	4,493	7.4%	624	6.9%
Wales	517	6.2%	4,016	5.5%	520	5.0%
North East	310	3.7%	4,770	3.9%	558	3.1%
Northern Ireland	577	6.9%	1,651	2.5%	698	7.0%

Note: C-stores and standard shops included – excluding kiosks © **Experian Limited 2023**

FUEL MARKET REVIEW 2023

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 supermarkets. It has been compiled from information provided to Forecourt Trader by the individual companies

Fuel Brand	ESSO	BP	SHELL	TEXACO	ESSO, NISA, INVER	TESCO	GULF	OTHER CERTAS ENERGY BRANDS*	MORRISONS
Company Name	**Esso Petroleum Company Ltd**	**BP Oil UK Limited**	**Shell UK Oil Products Ltd**	**Valero Energy Ltd**	**Greenergy**	**Tesco PLC**	**Certas Energy UK Ltd t/a Gulf Retail**	**Certas Energy UK Ltd**	**Wm Morrison Supermarkets plc**
Address	Ermyn House, Leatherhead, Surrey KT22 8UX	Witan Gate House, 500/600 Witan Gate Milton Keynes MK9 1ES	Shell Centre, York Road, London SE1 7NA	27th Floor, 1 Canada Square, Canary Wharf London, E14 5AA	198 High Holborn, London WC1V 7BD	Shire Park, Kestrel Way, Welwyn Garden City AL7 1GA	1st Floor, Allday House, Warrington Road, Birchwood Park, Warrington, Cheshire WA3 6GR	1st Floor, Allday House, Warrington Road, Birchwood Park, Warrington, Cheshire WA3 6GR	Hilmore House, Gain Lane, Bradford BD3 7DL
Telephone	01372 222000	01908 853000	020 7934 1234	020 7513 3000	020 7404 7700	01707 941939	0845 456 6300	0845 456 6300	0845 611 5000
Email	customer.care@exxonmobil.com	careline@bp.com	generalpublicenquiries-uk@shell.com	customercare@valero.com	mail@greenergy.com		gulfretail@certasenergy.co.uk	gulfretail@certasenergy.co.uk	Complete enquiry form on website
Website	www.esso.co.uk	www.bp.com	www.shell.co.uk	texaco.co.uk, valero.com	www.greenergy.com	www. tescoplc.com	www.certasenergy.co.uk	www.certasenergy.co.uk	www.morrisons.com
Head of retail	Patrick Rutherford	Sonya Adams	Bernie Williamson	Adele Shackleton	Caroline Lumbard	Gareth H Jones	Richard Billington	Richard Billington	Ashley Myers
No. of supplied sites	1,224	1,181	1,165	850	735*	512*	424	404	341
No. of branded sites	1,224	1,181	1,165	730	•	512	424	404	341
No. of dealers	•	169	258	850	192	•	352	331	•
No. of dealer owned sites	1,027	865	608	850	413	•	352	331	•
No. of company-owned sites	•	316	533*	•	•	512	72	7	341
Company owned *(direct managed)*	197 Esso Tesco alliance sites Tesco operates as agent.	309	•	•	•	512	34	7	341
Company owned *(franchisee/com-op)*	•	7 franchise operators	Retail business agreement	•	•	•	38	•	•
Areas of operation	UK	UK	England, Scotland, Wales	England, Wales, Northern Ireland	UK	UK	UK	UK	UK and Gibraltar
Fuels supplied *(Bio/Premium/LPG)*	Synergy Unleaded & Diesel, Synergy Supreme +Unleaded, & Diesel, Esso Supreme 25% Renewable Diesel	Diesel, Unleaded, Ultimate Unleaded, Ultimate Diesel, Adblue, LPG, EV	Unleaded, Diesel, V-Power Unleaded and Diesel, AdBlue, Hydrogen, Electricity	Diesel, Premium Unleaded, Supreme Diesel, Supreme Unleaded 97, Supreme 99 Performance+	Petrol, Diesel, Super-unleaded, 99 Octane, Super-diesel**	Unleaded, Diesel, Momentum 99 (Super Unleaded)	Unleaded, Diesel, Endurance Unleaded & Diesel, Flogas	Unleaded, Diesel, Endurance Unleaded & Diesel, Flogas	Unleaded, Super Unleaded, Diesel, LPG
Forecourt shop format/brand	•	287 M&S shops	394 Select, 22 Budgens, 109 Waitrose, 8 Co-op	•	Dealers choice	478 Tesco Petrol Station Kiosks, 19 Tesco Express	COCO sites - Spar/Costa Dealer sites various	•	Morrisons and M Daily
Tie-ups with other major brands	197 Esso Tesco Alliance sites	329 Wild Bean Café	660 Costa, 507 Jamie Oliver Deli by Shell, 28 Karcher, 330 Uber Eats 149 Amazon	•	Esso	Costa	Spar/Costa	Various	Costa Coffee
Major promotions /loyalty scheme	Clubcard on alliance sites. Nectar on Esso dealer sites	bpme rewards	Shell Go+	Star Rewards loyalty programme and the Texaco app	Nectar at Esso sites	Tesco Clubcard	Gulf Oomph loyalty card	•	My Morrisons card
No. of car washes	469	478 car wash, 460 jet wash	252	•	•	169 rollover, 207 jet, 265 hand, 27 conveyor car wash	•	•	276 car wash, 213 jet wash
No. of sites with LPG	34	80	•	•	•	•	•	•	71
Outside payment terminals	24	All sites are bpme-enabled for outdoor payments	Mobile payment for fuel (Fill up and Go)	•	•	5,000 on 512 sites	•	•	2,268 on 341 sites
Sites with alcohol licences	•	821	555	•	•	16	•	•	21
Sites with ATMs	830	957	565	•	•	58	•	•	•
Sites with electric vehicle chargers	135 chargers at 63 sites	127 sites with chargers	522 chargers at 215 sites	•	•	2,724 chargers across the estate	•	•	270 sites with rapid chargers in main car park
Any other comments	Mobile payment Esso app available at 928 sites. Greenergy delivers and supplies fuel to dealer-owned sites	BPme mobile payment app available at all sites	Mobile payment for fuel (Fill up and Go) 1 company owned site with hydrogen *There are also 25 sites operated by Waitrose and branded Shell		*Supplied sites refers to forecourts to which Greenergy supplies and delivers fuel. Greenergy supplies other forecourts on an ex-rack basis. **Full range of Synergy fuels for Esso sites	*Tesco/Esso Service Stations that have a Tesco Express store attached are not included in these numbers.		* Other/UK/Scottishfuels/Regent/Carlton/Power	

"Against a backdrop of rising costs, supply disruptions and protest action, security of supply has never been more important. Our access to strategic infrastructure has enabled us to continue delivering for our customers."

Caroline Lumbard, Greenergy UK trading director

Fuel Brand	ASDA	SAINSBURY'S	JET	MURCO	HARVEST ENERGY	PACE	MAXOL	TATE OIL	HIGHLAND FUELS JET, ESSO
Company Name	Asda Stores Ltd	Sainsbury's Supermarkets Ltd*	Phillips 66 Ltd	Motor Fuel Group (Murco Dealer Fuels)	Harvest Energy	Certas Energy UK Ltd t/a Pace Fuelcare Ltd	Maxol Oil Ltd	Tate Fuel Oils Ltd	Highland Fuels Ltd
Address	Asda House, Great Wilson Street, Leeds LS11 5AD	33 Holborn, London EC1N 2HT	7th Floor, 200-202 Aldersgate, London EC1A 4HD	10 Bricket Road, St Albans, Herts AL1 3JX	Harvest House, Horizon Business Village, 1 Brooklands Road, Weybridge, Surrey KT13 0TJ	1st Floor, Allday House, Warrington Road, Birchwood Park, Warrington, Cheshire WA3 6GR	48 Trench Road, Mallusk, Newtownabbey, Co Antrim BT36 4TY	Leeds Road, Otley LS21 3BB	Affic House, Beechwood Park, Inverness IV2 3BW
Telephone	0843 299 0019	020 7695 6000	020 7822 4400	01727 898890	07809 128263	0845 456 6300	028 9050 6000	01943 467444/07769 652721	0800 224224
Email	Complete enquiry form on website	via website	connect2jet@p66.com	murcodealers@motorfuelgroup.com	stuart.riding@harvestenergy.com	•	mail@maxol.ie	annette.perry@tateoil.co.uk	sales@highlandfuels.co.uk
Website	www.asda.co.uk	www.sainsburys.co.uk	www.jetlocal.co.uk	www.motorfuelgroup.com www.murco.co.uk	www.harvestenergy.com	www.certasenergy.co.uk	www.maxol.ie	www.tateoil.co.uk	www.highlandfuels.co.uk
Head of retail	Dave Tyrer	Jeff Simms	Oliver Müller	Craig Nugent	Stuart Riding	Richard Billington	Kevin Paterson	Annette Perry	Cameron Gold
No. of supplied sites	321*	315	300	179 (Murco branded)	154	121	102	98	84
No. of branded sites	321	315	300	179 (Murco branded)	Harvest 56/TotalEnergies47	121	102	23	67
No. of dealers	•	•	•	•		118	70	98	67
No. of dealer owned sites	•	•	289	179	126	118	70	98	67
No. of company-owned sites	321	315	11	•	28	3	32	•	17
Company owned (direct managed)	321	315		•	•	•	•	98	17
Company owned (franchisee/com-op)	•	•	11	•	•	3	Company owned dealer operated	•	•
Areas of operation	UK	UK	UK	England, Wales & Scotland	UK	UK	Northern Ireland	Midlands, north-east England, north-west England, Teeside	Scotland
Fuels supplied (Bio/Premium/LPG)	Unleaded, Diesel, LPG	Unleaded, Super Unleaded, Diesel, LPG	Unleaded, Diesel, Jet Ultra Unleaded, Jet Ultra Diesel, Jet Renewable Diesel, LPG	Unleaded, Optimum Unleaded, Diesel, Optimum Diesel	All retail grades including Total Excellium to Total Energies sites	Unleaded, Diesel, Endurance Unleaded, Endurance Diesel, Flogas	Unleaded, Premium Unleaded, Diesel, Premium Diesel (selected sites only)	All retail grades including premium	Unleaded, Diesel, Super unleaded, Kerosene, Gas Oil,
Forecourt shop format/brand	Asda branded forecourt shops on 53 locations	•	•	•	•	•	Spar on 25 company owned estate.	•	•
Tie-ups with other major brands	Seattle's Best Coffee and Leon	Costa Express on 240 sites	Spar on 11 sites	•	Morrisons, Londis, Spar, Costa	Various	•	•	Esso, Jet, Costa, Londis, Morrisons
Major promotions /loyalty scheme	Everyday low price	Nectar	•	•	•	Pace Loyalty Card	•	•	Nectar on some sites
No. of car washes	34 rollover car wash, 113 jet wash	152 conveyor, 110 jet wash	•	•	•	•	11 jet wash, 10 rollover on company owned sites	22	15
No. of sites with LPG	11	6	2	•	•	•	•	0	•
Outside payment terminals	2,087 terminals on 321 sites	213	•	•	•	•	22	6	7
Sites with alcohol licences	20	•	•	•	•	•	•	18	7
Sites with ATMs	35	•	•	•	•	•	23	4	10
Sites with electric vehicle chargers	•*	•	3	•	•	•	Six sites with 12 points	•	•
Any other comments	*Asda purchased 119 sites from the Co-op which continue to trade as Co-op with conversions planned for later this year	*All information supplied in 2022	Jet is the retail fuel brand of Phillips 66 Ltd, a refiner and fuel supplier providing 13% of the UK's road fuels, backed by the knowledge and security of its Humber Oil Refinery	Motor Fuel Group is actively seeking to recruit new dealers to the Murco brand. It also owns and operates more than 900 company owned stations	The company says that backed by ultra competitive and transparent supply prices from its refinery, the growth of the Harvest Energy and Total Energies brands is extremely strong				

"I am proud to be part of a business that has been championing UK drivers for more than 70 years. And as we collectively face the challenges of a changing industry our ambition remains unchanged: to continue to meet the needs of *all* UK drivers."

Oliver Mueller, Phillips 66, retail business manager

Fuel Brand	ESSAR	GLEANER	CIRCLE K	RIX	OIL4WALES	JET, MURCO, DRAGON	BWOC	MANX PETROLEUM
Company Name	Essar Oil UK Ltd	Gleaner Ltd	Circle K Energy Ltd	Rix Petroleum Ltd	Oil 4 Wales Ltd	NWF Fuels Ltd*	BWOC Ltd	Manx Petroleums Ltd
Address	5th Floor, The Administration Building, Stanlow Manufacturing Complex, Ellesmere Port CH65 4HB	Milnfield, Elgin IV30 1UU	Circle K House, Beech Hill, Clonskeagh, Dublin DO4 YO16	Two Humber Quays, Wellington Street Hull HU1 2BN	Nantycaws Filling Station, A48, Nantycaws, Carmarthenshire SA32 8BG	Wardle, Nantwich, Cheshire CW5 6AFD	BW Estate, Oldmixon Crescent, Weston-super-Mare BS24 9BA	PO Box 47, Battery Pier, Douglas, Isle of Man IM99 1DE
Telephone	0151 350 4964	01343 557400	00353 1 202 8888	01482 224422	01267 275777	01829 260900	01934 417576	01624 691691
Email	retail@essaroil.co.uk	info@gleaner.co.uk	retailcustomersupport@circlekeurope.com	steve.ella@rix.co.uk	sales@oil4wales.co.uk	mark.adcock@nwffuels.co.uk	amy.jones@bwoc.co.uk	info@mp.im
Website	www.essaroil.co.uk/retail	www.gleaner.co.uk	www.circlek.ie	www.rix.co.uk	www.oil4wales.co.uk	www.nwffuels.co.uk	www.bwoc.co.uk	www.mp.im
Head of retail	Phillip Brodie	David Todd	Jonathan Diver	Steve Ella	Tony Cole	Mark Adcock	Amy Jones	Richard Gelder
No. of supplied sites	70	53	50	39	32	32	20	7
No. of branded sites	70	49	50	●	15	17	3	7
No. of dealers	67	35	50	39	30	32	●	3
No. of dealer owned sites	67	36	50	39	30	32	●	4
No. of company-owned sites	3	14	●	●	3	●	●	3
Company owned *(direct managed)*	0	14	●	●	3	●	●	●
Company owned *(franchisee/com-op)*	3	●	●	●	●	●	●	3 leased to private operators
Areas of operation	England, Wales	Scotland	Northern Ireland	Yorks, Lincs, Midlands, East Anglia, East Scotland	Wales	England and Wales	Nationwide	Isle of Man
Fuels supplied *(Bio/Premium/LPG)*	Unleaded, Super Unleaded 97 + 99, Diesel, Super Diesel, Gas Oil, Kerosene, HVO	Unleaded, Super Unleaded, Diesel, LPG, Kerosene, Red Diesel	Miles Unleaded, MilesPlus Unleaded, Miles Diesel, MilesPlus Diesel, Kerosene	Unleaded, Super Unleaded, Diesel, Super Diesel, Gas Oil	Diesel, Unleaded, Super Unleaded, Gas Oil, Kerosene, HVO	Diesel, Unleaded, Super Unleaded, Gas Oil, Kerosene	Unleaded, Super Unleaded, ULSD, Gas Oil, Kerosene	Unleaded, Super Unleaded, Diesel, Gas Oil
Forecourt shop format/brand	●	36	●	●	Spar on 3 sites	●	●	5 Spar
Tie-ups with other major brands	Morrisons, Spar, Costa	Spar, Tchibo, Costa, Londis	SuperValu, Centra, Mace. Spar, EuroSpar, VivoXtra, Nisa, Costcutter, Today Extra	3	Costa	●	●	●
Major promotions /loyalty scheme	Essar Loyalty Programme	●	Circle K Extra	●	●	●	●	●
No. of car washes	25	27	8 rollover, 11 jet wash	2	2	●	●	4 rollover, 4 jet wash
No. of sites with LPG	4	6	2	1	●	●	●	1
Outside payment terminals	3	9	5	1	●	●	●	●
Sites with alcohol licences	49	16	21	2	3	●	●	6
Sites with ATMs	21	6	47	3	2	●	●	●
Sites with electric vehicle chargers	5	1	2 (operated by ESB)	●		●	●	●
Any other comments	With a growing forecourt network and brand presence across the country, we believe we can deliver 'Driving Community Convenience' by serving local communities where our sites are a hub.				We now sell white HVO at Nantycaws Filling Station	*Information supplied by NWF Fuels in 2019. Data for 2022 to be confirmed		

"Behind Murco's striking brand image is one of the most flexible and competitive fuel supply offers available in the market today."

Craig Nugent, Murco/MFG director of dealer operations

UK Dealer Car Wash by Type 2023

	TOTAL	DEALERS + CAR WASH		TYPE OF CAR WASH			
		No of Sites	%	Jet	Auto	Conveyor	Hand
TOTAL	**5,325**	**2,297**	**43.1%**	**1,914**	**989**	**19**	**574**
Applegreen	23	3	13.0%	2	2	1	0
Asda	10	7	70.0%	6	2	0	0
BP	849	451	53.1%	378	240	7	109
Certas Energy	579	135	23.3%	127	25	0	57
Circle K	44	15	34.1%	13	8	0	5
Co-Op	32	17	53.1%	12	10	0	0
Essar	67	15	22.4%	11	6	0	14
Esso	1,019	544	53.4%	385	321	5	58
Gleaner	36	11	30.6%	11	0	0	0
Go	17	2	11.8%	2	1	1	0
Jet	289	174	60.2%	154	59	0	40
Maxol	71	32	45.1%	31	9	0	11
Minor Brand	127	22	17.3%	20	5	0	7
Murco	166	43	25.9%	40	6	0	14
Rix	14	0	0.0%	0	0	0	0
Shell	591	313	53.0%	268	151	3	65
Solo	60	19	31.7%	19	2	0	16
Star	18	6	33.3%	6	0	0	3
Texaco	735	378	51.4%	326	125	2	129
Thames	23	11	47.8%	11	0	0	0
Total Energies	83	31	37.3%	26	11	0	16
Unbranded	472	68	14.4%	66	6	0	30

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FAST FACT

8,354

The number of petrol forecourts across the UK

PAGE 4 ◀ out continues to lag behind EV uptake with one standard public charger for every 36 plug-in cars. According to ZapMap, at the end of May 2023, there were 43,626 EV chargers across 25,413 locations, a 38% increase over 2022 figures. Despite the increase in charge-point installations, the RAC has warned that the government is unlikely to meet its target of having six or more rapid or ultra-rapid EV chargers at every motorway service area in England by the end of 2023.

Moto Hospitality recently did its bit by rolling out 187 high-powered EV chargers across 16 sites, working with Gridserve and Tesla, and now has a total of 371 chargers across its network of motorway and trunk road service areas. Many fuel retailers however, are struggling to justify the installation of EV chargers as a viable business proposition.

NEGATIVE PRESS

However, EVs have started to receive negative press. TV star and columnist Giles Coren ditched his 'useless' £65,000 Jaguar i-Pace earlier this year while comedian and petrolhead Rowan Artkinson wrote in The Guardian about feeling 'duped' by all the green claims surrounding EVs.

Range anxiety used to worry a lot of people – and it still does. But it seems there could be queue anxiety too as in January newspapers carried photos of Tesla drivers queueing for hours to charge their cars.

Then there are reports that tyres on EVs release more toxic tyre particles into the air than their petrol equivalents.

But the big worry is also the cost of an EV – which is typically thousands of pounds more than a petrol or diesel vehicle – and because of increasing electricity prices.

The price of charging on the public network has increased and late last year, Tesco started charging at its sites.

In January, headlines screamed that EVs were more costly than petrol vehicles on longer journeys. And drivers are also waking up to the fact that an EV battery might not last as long as they thought and that replacement could be extremely costly.

Plus there has also been talk of introducing a pay-per-mile usage charge for EV drivers to counter the decline in fuel duty revenue.

Other anti-EV stories include the fact that older multi-storey car parks could collapse under the weight of the heavy cars – which weigh around twice as much as an ICE car.

All of this has put a rather large dent in the virtues of the EV. There is no doubt a place for them on the road but perhaps the government is pushing too far, too soon?

Indeed UKPIA recently called on the government to consider all types of zero emission vehicles in the future and not just focus on electric. The Association says the government needs to take a 'technology neutral' approach to achieve the most efficient path to net zero.

The Department for Transport will only allow ZEVs with no exhaust emissions such as battery or fuel cell EVs. This contrasts with the EU, which recently announced it will allow ZEVs powered by e-fuels after 2035 to help achieve net zero. UKPIA believes the UK should follow suit.

Meanwhile, hydrogen is seen by many as a good alternative to electric for some vehicles, specifically HGVs however the number of retail sites selling hydrogen has dropped from three to zero. That said, there are many scientists at work developing hydrogen fuel systems. And Exelby Services was recently granted planning permision for two permanent hydrogen refuelling stations at two of its sites.

Car giant Toyota recently unveiled plans to improve energy densities and performance of battery electric vehicles (BEVs) but also to continue to champion hydrogen as an important fuel to reduce CO2 emissions.

It has developed a trial hydrogen-engine vehicle, licensed to be driven on public roads in Japan. Toyota said it will accelerate the development of hydrogen-engine vehicles for commercialisation as a new option for contributing to carbon neutrality.

Meanwhile, Experian's figures show that the number of retail sites offering CNG/LNG remains at six while the number of retail sites with Auto LPG is down 30 from 696 to 666.

GAINING TRACTION

A fuel type that is gaining traction is HVO (hydrotreated vegetable oil) or renewable diesel. It's described as a fossil-free paraffinic diesel fuel that can be used as a direct replacement for mineral diesel with up to 90% lower net CO2 emissions.

Esso launched a limited trial of Esso Supreme 25% Renewable Diesel last year, saying that it can be used in all diesel engines that are compatible with B7 fuel. At the time of launch, Esso said it demonstrated that the existing fuel infrastructure can deliver lower-emission fuels in a familiar way that will appeal to many consumers.

Phillips 66 also launched Jet Renewable ▶

UK Dealer Fuel Market by Brand 2023

	NO OF OUTLETS	VOLUME*	SHARE %		MARKET
		Av (kl pa)	Market	Outlet	Effectiveness
TOTAL	**5,326**	**2,634**	**100%**	**100%**	**1.00**
Esso	1,019	3,602	26.2%	19.1%	1.37
BP	849	3,808	23.1%	15.9%	1.45
Shell	591	3,948	16.7%	11.1%	1.50
Texaco	735	2,534	13.2%	13.8%	0.96
Jet	289	2,521	5.2%	5.4%	0.96
Certas Energy	579	1,182	4.9%	10.9%	0.45
Unbranded	472	538	1.8%	8.9%	0.20
Murco	166	1,259	1.5%	3.1%	0.48
Total Energies	83	2,348	1.4%	1.6%	0.89
Applegreen	23	7,074	1.2%	0.4%	2.69
Co-Op	134	4,160	1.50	1.60	0.93
Essar	67	1,622	0.8%	1.3%	0.62
Maxol	71	1,336	0.7%	1.3%	0.51
Minor Brand	128	720	0.7%	2.4%	0.27
Circle K	44	1,605	0.5%	0.8%	0.61
Solo	60	834	0.4%	1.1%	0.32
Asda	10	4,420	0.3%	0.2%	1.68
Go	17	1,706	0.2%	0.3%	0.65
Gleaner	36	618	0.2%	0.7%	0.23
Thames	23	737	0.1%	0.4%	0.28
Star	18	892	0.1%	0.3%	0.34
Rix	14	556	0.1%	0.3%	0.21

Note: Applegreen – these are the Welcome Break sites, previously in minor brand

UK Dealer Forecourt Shop Market by Type 2023

	AMOUNT	AV SALES	AV SIZE	SHARE %		MARKET
		(£k pa)	(sq m)	Market	Outlet	Effectiveness
TOTAL	**5,326**	**513**	**67**	**100%**	**100%**	**1.00**
C-Store	1,741	990	132	62.9%	32.7%	1.92
Standard	3,029	334	41	36.9%	56.9%	0.65
Kiosk	147	32	12	0.2%	2.8%	0.06
No Shop	409	•	•	•	•	•

Note: Shops include kiosks **Tables above © Experian Limited 2023**

"Our retail business in the UK is transforming with a fresh, new purpose: 'Driving Community Convenience' - focused on serving the convenience needs of the local communities where our sites are a hub."

Phillip Brodie, Essar retail business manager

Diesel at two sites last summer. And our Fuel Market Review reveals that Essar offers HVo as does Oil 4 Wales.

We mustn't forget premium grades of petrol and diesel as the launch of E10 meant some drivers had no choice but to buy this superior fuel. And there are those drivers with performance cars who will always choose this grade of fuel.

As an example, marques like Ferrari and the BMW M series recommend owners use Shell's new, improved V-Power which the oil giant says can improve engine performance and fuel economy.

THE FUTURE IS BRIGHT

While many forecourts have embraced EV charging, others are delaying investment until the time is 'right' for them. And, despite the government's obsession with EVs, many drivers are keen to hold onto their petrol and diesel-powered cars because they cannot afford to change or are not yet convinced by EV technology.

This means that even though the 2030 deadline for the cessation of new ICE vehicle sales is looming, there will be a need for traditional forecourts for some time to come. Steve Rodell, managing director, retail, at Christie & Co reckons that come 2029, we'll still have people buying petrol and diesel cars with the intention of running them for 15 or 20 years. And they will rely on traditional forecourts to supply them with fuel.

Forecourts are adapting and changing all the time to meet consumer needs.

The winner of Forecourt Trader of the Year 2022 is a prime example. MFG Putney is described as a 'dual fuel' station with eight dedicated ultra-rapid charging bays and eight traditional pumps. MFG says it is an "industry leading blueprint for the future".

Of course, a forecourt's primary purpose was always to fuel cars and vans but nowadays many forecourt stores are better than standalone convenience stores at fuelling people too.

The stores are of a seriously high standard and the services operators have put in place – from food-to-go counters, cafes and car washes to post offices, launderettes and vape stores – have transformed the industry. If you look back it's hard to reconcile the forecourts of old, with their tiny kiosks or little shops selling just Mars bars and Cokes, with today's offerings. And many have become real community stores, upon which locals rely – day and night.

It's this incredible ability to adapt and give consumers exactly what they want – when they want it – that makes the industry such a resounding success. And long may that continue!

FAST FACT

15.5% Tesco is the biggest fuel supplier with a 15.5% market share

UK Forecourt Shop Market by Shop Fascia 2023

	AMOUNT	AV SALES	AV SIZE	SHARE %		MARKET
		(£k pa)	(sq m)	Market	Outlet	Effectiveness
TOTAL	**7,394**	**663**	**79**	**100%**	**100%**	**1.00**
Spar/Spar Express/Eurospar	1,085	729	99	16.1%	14.7%	1.10
Tesco/Extra/Express	686	1,050	86	14.7%	9.3%	1.58
Londis/Express	1,155	536	65	12.6%	15.6%	0.81
M&S Simply Food/Food To Go	290	1,305	168	7.7%	3.9%	1.97
Other Facias	693	462	60	6.5%	9.4%	0.70
Co-Operative/Food	184	1,662	171	6.2%	2.5%	2.51
Morrisons/Daily	438	553	60	4.9%	5.9%	0.83
Shell Select/Deli2go	403	577	63	4.7%	5.5%	0.87
Sainsburys/Local/On-The-Go	310	609	69	3.9%	4.2%	0.92
Unbranded	779	241	40	3.8%	10.5%	0.36
Budgens	142	1,070	144	3.1%	1.9%	1.61
Asda/On The Move	111	1,142	117	2.6%	1.5%	1.72
Nisa Local/Express/Extra/Today	148	715	108	2.2%	2.0%	1.08
Waitrose/Little Waitrose At Select	88	993	114	1.8%	1.2%	1.50
Shop'n Drive	170	487	53	1.7%	2.3%	0.73
Premier/Express	184	412	58	1.5%	2.5%	0.62
BP Shop/Connect	107	703	84	1.5%	1.4%	1.06
Mace/Express	154	433	53	1.4%	2.1%	0.65
Costcutter/Express	99	532	84	1.1%	1.3%	0.80
Applegreen	75	675	89	1.0%	1.0%	1.02
Shell Shop	76	411	45	0.6%	1.0%	0.62
Hursts	17	586	56	0.2%	0.2%	0.88

Note: Showing shop fascias with market share
Both tables: C-stores and standard shops included – excluding kiosks © **Experian Limited 2023**

UK Dealer Forecourt Shop Market by Fuel Brand 2023

	NO OF FCT SHOPS	AV SALES			AV SIZE	SHARE %		MARKET
		(£k pa)	(£000) per sq m	(£) per '000Litres	(Sq mtrs)	Market	Outlet	Effectiveness
TOTAL	**4,769**	**572**	**7.7**	**199**	**74**	**100%**	**100%**	**1.0**
Esso	1,018	607	8.2	168	74	22.6%	21.3%	1.06
BP	847	698	8.0	183	87	21.6%	17.8%	1.22
Texaco	730	584	7.6	231	77	15.6%	15.3%	1.02
Shell	589	700	7.8	177	89	15.1%	12.4%	1.22
Certas Energy	393	320	6.5	215	49	4.6%	8.2%	0.56
Jet	285	398	6.9	157	57	4.1%	6.0%	0.69
Co-Op	31	2,065	11.1	473	186	2.3%	0.7%	3.61
Unbranded	249	244	5.5	338	44	2.2%	5.2%	0.43
Maxol	68	892	8.5	646	105	2.2%	1.4%	1.56
Murco	142	335	6.2	244	54	1.7%	3.0%	0.59
Circle K	44	1,031	9.4	642	110	1.7%	0.9%	1.80
Total Energies	77	461	8.2	191	56	1.3%	1.6%	0.81
Minor Brand	73	324	6.0	329	54	0.9%	1.5%	0.57
Solo	53	430	7.3	523	59	0.8%	1.1%	0.75
Essar	62	331	5.8	196	57	0.8%	1.3%	0.58
Applegreen	23	783	9.3	111	84	0.7%	0.5%	1.37
Asda	10	1,505	9.1	340	165	0.6%	0.2%	2.63
Go	16	819	5.5	485	149	0.5%	0.3%	1.43
Star	18	667	9.9	748	68	0.4%	0.4%	1.17
Gleaner	19	206	4.2	260	49	0.1%	0.4%	0.36
Thames	15	120	4.5	127	26	0.1%	0.3%	0.21
Rix	7	113	4.8	143	24	0.0%	0.1%	0.20

Site Numbers by Brand

	NO OF SITES		
	May-21	May-22	May-23
TOTAL	**8387**	**8380**	**8354**
3D	1	1	1
Amco	1	1	1
Applegreen	48	46	48
Asda	325	324	323
Asda On The Move	•	•	10
Bata	2	2	2
BFL	4	3	3
BP	1224	1224	1171
Breeze	2	1	2
Broadland Fuels	1	1	1
Burnbrae	1	1	1
Butler	3	3	3
Bwoc	9	8	8
Callow	2	1	1
Carlisles	1	1	1
Carlton	4	3	2
Centra	1	2	2
Certas Energy	1	1	1
Circle K	45	42	44
Co-Op	106	112	134
Costco	17	18	18
Costcutter	1	1	•
Day Today	1	1	1
Deccan Fuels	1	1	1
Dragon	10	10	9
Emo	26	27	26
Essar	70	66	67
Esso	1210	1215	1219
Euro Oil	1	1	1
Eurospar	2	2	2
EVF	9	2	2
Fass	•	•	1
Flare	4	4	4
Gleaner	53	50	48
Go	27	27	29
Gulf	428	438	432
Harvest Energy	61	59	61
Haven	1	1	1
Heltor	6	6	6
Highland	14	15	15
HT	1	1	1
Imperial	1	1	1
Inver	•	1	1

	NO OF SITES		
	May-21	May-22	May-23
Jet	310	296	301
Keyfuels	1	1	1
LCC Oil	1	1	1
Lincolnshire Fuels	2	2	2
Low Prices Always	60	61	60
Mac	1	1	1
Mace	1	1	1
Major	1	1	1
Manx	8	7	7
Maxol	100	100	102
MFS	1	1	1
Minster	2	1	1
Morgan Fuels	4	4	4
Morrisons	339	339	340
Murco	173	172	170
Newts Oil	1	1	1
Nicholl Fuel Oils	8	10	19
Nisa	6	4	4
Now	2	2	1
NWF	6	4	4
Oak	4	4	3
Oil4Wales	18	15	13
One	4	4	4
Oyslans	•	1	•
Pace	135	127	116
Peak Oil	1	1	1

	NO OF SITES		
	May-21	May-22	May-23
Phoenix	1	1	1
Power	23	15	14
Premier Fuels	1	1	1
Pricewatch Localfuels	5	5	3
Pricewatch Power	7	7	4
Prince	2	2	2
Proteus	2	2	1
Qubec Petroleum	1	1	1
Regency Oils	5	5	4
Regent	7	6	6
Repsol	1	1	1
Rix	20	18	14
Sainsburys	316	317	315
Scottish Fuels	21	21	21
Scottish Island Fuels	10	10	10
Sea	1	1	1
Severn Fuels	1	1	1
Shell	1094	1137	1160
Solo	64	64	63
Spar	9	4	3
Spot	2	2	2
Spur	1	1	1
ST1	1	•	•
Star	31	31	18
Tate	12	13	10
Team Spirit	1	1	1
Tesco	276	280	278
Tesco Express	19	19	19
Tesco Extra	215	215	215
Texaco	723	725	737
Thames	27	25	24
Thrust	•	•	1
Total	12	12	7
Total Energies	•	14	28
UK	26	25	23
Unbranded	467	445	428
United	1	1	1
Vivo	3	3	1
Watson	2	2	2
WCF	17	18	15
Welcome Break	23	26	37
Welsh Fuels	1	1	1

Catalist UK Database May 2021, 2022, 2023
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