Reversing the trend

Does this year mark a watershed for the market asks network specialist **ARTHUR RENSHAW**, UK and Ireland manager of Experian Catalist

In 1966 when England last won the World Cup there were close to 40,000 open forecourts in the UK. The numbers have declined every single year since then and the question a few years ago was "how low will we go?"

Experian Catalist has been actively monitoring the numbers since 2000, and 2005 was when the numbers dropped below the benchmark 10,000 sites. In 2007 the rate of decline started to slow and in 2011 and 2012 the net annual closure rate fell below 100. The headline news is that in 2013 the number of open forecourts in the UK actually increased.

Compared to last year's annual review we are reporting a net increase of 26 sites. It may not be many, but this is the first increase since 1966 – so let's hope it's an omen for the performance of the England football team in Brazil. More specifically, for many of the readers of Forecourt Trader, it is the dealer sector that has grown in numbers significantly – 154 over the year – led by the transfer of the Esso company-owned sites into the dealer network with Euro Garages and MRH.

We recorded 59 new-build sites over the year. This comprised 35 by the major multiple retailers (down from 46 in the previous year primarily due to a slowdown in Tesco's development programme), with 23 new dealer sites and only one new oil company site. In addition, 61 sites re-opened after a period of closure.

Carrying on the trend from last year, the number of sites changing ownership from oil company to dealer was significant – 188 in the last year – mainly 126 sites from Esso, with 20 from Shell and 23 from BP. We also recorded that over 700 dealer sites – 13% of the dealer network – changed fuel supplier brand over the past year.

A continuing sign that the industry is in a reasonably healthy position is that during the past year we have recorded a low number of closures – a total of 112 including 98 dealer sites. These closures were primarily from unbranded (36), Texaco (12) and the rest from various minor brands. In the company-owned sector there were only four closures.

Property market

From a property market perspective, forecourt and convenience values are continuing to hold up better than in most other sectors, and we have seen an influx of private equity capital, which provides a boost to confidence in the sector. Compared with high street retail, the forecourt sector has performed well and again we have had no significant financial failures from among the major players across the industry.

Indeed the past year has seen the continuing rise of the 'super dealers' with MRH, Euro Garages, Motor Fuel Group, Petrogas and Rontec leading the way in increasing site numbers. With Esso intending to sell its remaining 200 sites in 2014, their estates are likely to increase further.

The various co-op societies are still actively acquiring sites in the forecourt sector, and a number of the hypermarkets have made statements of intent with respect to acquiring or building standalone forecourts as a vehicle for their convenience offer. Three of the four hypermarkets made a start on this towards the end of 2013 by acquiring existing forecourts, and Asda intends to have 100 standalone sites by 2018.

UK MARKET BY BRAND

BRAND	NO OF OUTLETS	AV VOL (KL PA)	% MARKET SHARE	% OUTLET SHARE	MKT EFFECT-IVENESS
TESCO	499	11,791	16.5%	5.8%	2.8
BP	1,162	4,279	13.9%	13.5%	1.0
SHELL	1,019	4,591	13.1%	11.8%	1.1
ESSO	995	3,871	10.8%	11.5%	0.9
SAINSBURYS	295	12,444	10.3%	3.4%	3.0
MORRISONS	331	10,818	10.0%	3.8%	2.6
ASDA	233	10,420	6.7%	2.7%	2.5
TEXACO	802	2,626	5.9%	9.3%	0.6
CERTAS ENERGY	1,028	1,362	3.9%	11.9%	0.3
JET	314	2,569	2.3%	3.6%	0.6
MURCO	455	1,750	2.2%	5.3%	0.4
UNBRANDED	728	728	1.5%	8.4%	0.2
MINOR BRAND	252	1,181	0.8%	2.9%	0.3
HARVEST ENERGY	106	2,357	0.7%	1.2%	0.6
MAXOL	102	1,509	0.4%	1.2%	0.4
FOOD STORE	37	1,785	0.2%	0.4%	0.4
TOPAZ	36	1,593	0.2%	0.4%	0.4
GLEANER	64	804	0.1%	0.7%	0.2
STAR	36	1,314	0.1%	0.4%	0.3
SOLO	49	877	0.1%	0.6%	0.2
THAMES	36	802	0.1%	0.4%	0.2
RIX	37	629	0.1%	0.4%	0.2
UK TOTAL	8,616	4,143	100.0%	100.0%	1.0

© Experian Limited 2014

UK FUEL MARKET 2013 VS 2014

OWNERSHIP	FUEL REVIEW 2014	FUEL REVIEW 2013	NET CHANGE YEAR ON YEAR
HYPERMARKET	1,358	1,315	43
DEALER	5,341	5,187	154
COMPANY	1,917	2,088	-171
UK TOTAL	8,616	8,590	26

UK FUEL MARKET BY OWNERSHIP

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	1,358	11,462	43.5%	15.8%	2.8	82%	62%
DEALER	5,341	2,114	31.7%	62.0%	0.5	90%	47%
OIL COMPANY	1,917	4,629	24.8%	22.2%	1.1	100%	51%
UK TOTAL	8,616	4,143	100%	100.0%	1.0	91%	50%

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

© Experian Limited 2014

UK FORECOURT SHOP MARKET BY FUEL BRAND

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	1,161	795	94	21.3%	15.3%	1.4	8.5	186
ESSO	993	929	90	21.2%	13.1%	1.6	10.3	239
SHELL	1,016	574	66	13.4%	13.4%	1.0	8.6	124
TEXACO	783	592	76	10.7%	10.3%	1.0	7.8	222
CERTAS ENERGY	763	335	52	5.9%	10.0%	0.6	6.4	198
TESCO	489	500	46	5.6%	6.4%	0.9	10.9	41
SAINSBURYS	290	582	63	3.7%	3.8%	1.0	9.2	44
MURCO	419	378	52	3.7%	5.5%	0.7	7.3	204
MORRISONS	327	396	37	2.9%	4.3%	0.7	10.7	35
JET	312	394	54	2.8%	4.1%	0.7	7.3	153
UNBRANDED	423	250	45	2.4%	5.6%	0.4	5.5	242
MAXOL	92	765	77	1.6%	1.2%	1.3	10.0	486
MINOR BRAND	160	374	54	1.4%	2.1%	0.7	7.0	231
HARVEST ENERGY	103	367	51	0.9%	1.4%	0.6	7.1	153
TOPAZ	35	723	84	0.6%	0.5%	1.3	8.6	445
STAR	36	604	65	0.5%	0.5%	1.1	9.3	460
FOOD STORE	35	557	77	0.4%	0.5%	1.0	7.2	331
SOLO	44	403	51	0.4%	0.6%	0.7	7.9	437
ASDA	33	440	50	0.3%	0.4%	0.7	8.7	39
GLEANER	45	193	45	0.2%	0.6%	0.3	4.3	199
RIX	16	324	47	0.1%	0.2%	0.6	6.9	319
THAMES	30	170	34	0.1%	0.4%	0.3	5.1	185
UK TOTAL	7,605	569	67	100.0%	100.0%	1.0	8.5	131

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

© Experian Limited 2014

UK FORECOURT SHOP MARKET BY OWNERSHIP

OWNERSHIP	NO OF FCT SHOPS	AV SHOP SALES (£K PA)	AV SHOP SIZE (SQ MTRS)	% SHOP MARKET SHARE SHARE	% SHOP OUTLET	MKT EFFECTIVENESS (SHOP)	AV SHOP SIZE (£000) (SQ MTRS)	AV SHOP SALES (£) PER '000 LITRES
DEALER	4,563	470	64	49.3%	60.0%	0.8	7.4	195
OIL COMPANY	1,903	872	88	38.2%	25.0%	1.5	9.9	187
HYPERMARKET	1,139	489	48	12.4%	15.0%	0.8	10.3	40
UK TOTAL	7,605	569	67	100%	100.0%	1.0	8.5	131

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

© Experian Limited 2014

UK FORECOURT SHOP MARKET BY TYPE

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	2,026	1,141	136	52.9%	25.7%	2.1
STANDARD	5,579	368	42	46.9%	70.7%	0.7
KIOSK	284	32	12	0.2%	3.7%	0.1
NO SHOP	727					
UK TOTAL	8,616	567	67	100%	100.0%	1.0

© Experian Limited 2014

Dealer groups such as Euro Garages account for nearly one third of the independent dealer sector

Fuel prices

Ask most members of the general public and they will almost certainly complain about the price of fuel on the forecourt and how much it has gone up. However, the chart below demonstrates that for the second year running the pump price has gone down by 2ppl-3ppl (May 2014-May 2013) and that retail prices have been relatively stable around a range +/-5ppl for the past three years.

This stability was helped by the fact that the government has not altered the level of duty and looks likely to continue with this policy until the next general election in May 2015.

Fuel volumes

There has been much made of falling fuel volumes over the year and there was some consternation when the Department of Energy and Climate Change (DECC) produced figures that showed a big jump in the hypermarkets' fuel volumes, which appeared to suggest that the rest of the network was even further down.

However, following an in-depth review DECC finally released the revised official figures at the end of March that agree with HM Revenue & Customs (HMRC) figures.

They show that the deliveries of motor fuels (petrol and diesel) for full year 2013 were only 0.3% down against 2012 levels at 45bn litres. Drilling down into the 2013 full-year figures, they show a 2.4% increase in diesel volumes to 27bn litres, and a 4.1% decrease in petrol volumes to 18bn litres.

In terms of retail fuel volumes (primarily excluding commercial diesel) total volumes declined by 1.3% from 36bn in 2012 to 35.5bn in 2013.

For the hypermarket sector within retail, the revised DECC figures show fuel volumes static between 2012 and 2013 at 15.5bn litres – equivalent to a 43.8% market share of retail volumes.

The rest of the retail network, covering the dealer and company owned sectors but excluding the hypermarkets, shows a decline of 2.3% from 20.4bn litres in 2012 to 19.9bn litres in 2013.

Market structure

As the above shows, when compared with the Forecourt Trader Fuel Market Review 2013, we see that UK site numbers have increased by a net 26 sites.

That means we are now reporting that there are 8,616 open retail sites in the UK with an average fuel volume unchanged at just over 4.1mlpa, and shop sales total £4.3bn – an average of £10,900 per site per week from an average 67sq m shop.

There are now 5,341 independent dealer sites in the UK (a net increase of 154 sites compared with last year's Fuel Market Review) and almost one third of these sites are operated by dealer groups with three sites or more. The average dealer site now sells 2.1mlpa and turns over £9,000 per week through a 64sq m shop.

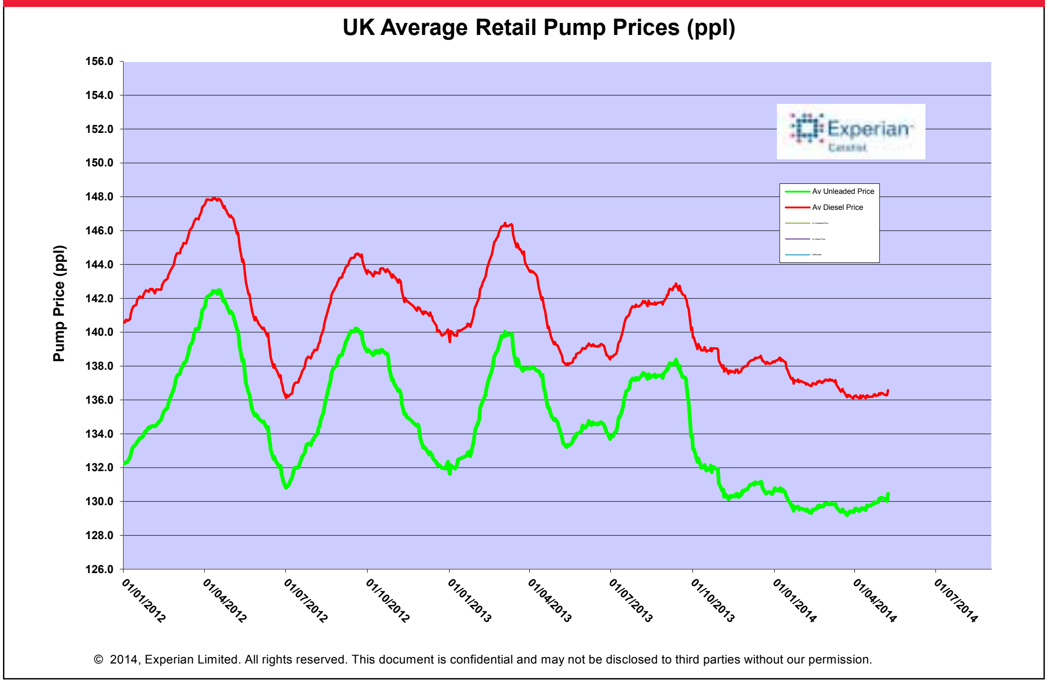
In light of the revised DECC figures for the hypermarkets, and with nearly 16% (1,358) of the sites, Experian calculates the hypermarkets hold a 43.5% share of motor fuel sales and they are the single largest sector by some margin.

The dealer sector has grown in numbers since last year, and now has 62% of the sites, but it remained fairly static in terms of motor fuel market share at 31.7%. The oil company owned sector now has only 22% of the sites and its share of the motor fuel market has dropped below 25%.

In the regional breakdown of the forecourt sector, the South East continues to dominate. Almost a quarter of the sites, 30% of the UK's motor fuel sales and 34% of forecourt shop sales are concentrated there.

Northern Ireland has the smallest regional market share in terms of fuel volume, 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 actually increased by 11.

UK AVERAGE RETAIL PUMP PRICES (ppl)



Nisa (left) and Spar have both launched branded fuel formats

Market shares and brands

Esso, with the Rontec sites transferring from Total, made the biggest gains over the past 12 months (+106) along with Certas Energy (+29). All the major multiple retailers added sites into their networks over the past year, although Tesco only added two. BP (-49), Shell (-13) and Texaco (-17) all lost sites during the year, and Harvest Energy had a net change of one site after several years of significant growth.

The unbranded sites have increased to 728 but they remain most vulnerable to the continued squeeze on margins and to the pressures on environmental factors surrounding forecourt operation.

In the dealer sector, Certas Energy supplies the most sites with 1,023 (+30), followed by BP with 841 (-52) and Texaco is in third place with 802 (-17) sites. Esso gained the most dealer sites this year (+122) as it moved a number of tranches of its company-owned sites into the dealer sector, and the Rontec sites also rebranded to Esso. In terms of motor fuel market share in the dealer sector, BP leads the way with 27.2%, Texaco is next with 18.7%, then Esso with 13.5% and Certas Energy with 12.3%.

Forecourt shops

Overall sales from the forecourt shop sector have remained at around £4.3bn per year in the UK. There are now more than 2,000 sites with convenience stores and they account for 53% of forecourt shop sales. The average convenience store turns over £22,000 per week from 136sq m of floorspace.

Similarly to last year, in the dealer market shop sales are more than £2bn per year (49% of the forecourt shop sales sector). Within the dealer sector 90% of sites now have a shop and 24% of the sites (1,173) have a convenience store, an increase of 63 sites on 2013.

In terms of forecourt shop fascias the Tesco/Tesco Express shop fascia leads the way on 685 sites (+5). This includes the Esso/Tesco Alliance sites as well as the shops on its own forecourts, and it has almost 17% of the £4.3bn forecourt shop market. Spar is the most prevalent symbol fascia, appearing on 633 forecourts (+34), and holds a 10.7% market share. The Shell Select/Deli2go fascia is the third most numerous on 561 (+64) sites with 7.5% of the market.

At the other end of the scale, 511 dealer sites have no forecourt shop at all. Experian is also recording over 20% of forecourt shops (1,541) have no brand on their shop, although this is 120 less than last year. In terms of regional distribution, the South East dominates with 34% of forecourt shop sales, and the next region is the South West with 10%.

The outlook

Overall, the optimistic position we adopted in the 2013 Fuel Market Review has generally been borne out and there are some other positive issues continuing into 2014 including:

- new car registrations up in the first quarter by nearly 14% – almost back to the level of 2004;
- margins continuing to look fairly robust;
- fuel duty deferment options;
- the rural fuel duty relief scheme introduced in 2013.

UK FUEL & SHOP MARKET 2014 – DISTRIBUTION BY REGION

UK STANDARD REGION	NO OF OUTLETS	AV FUEL VOLUME (KL PA)	AV SHOP SALES (£K PA)	% OUTLETS	% FUEL VOLUME	% SHOP SALES
SOUTH EAST	2,102	5,093	742	24%	30%	34%
NORTH WEST	772	4,832	497	9%	10%	8%
SOUTH WEST	856	3,936	548	10%	9%	10%
WEST MIDLANDS	733	4,432	563	9%	9%	9%
SCOTLAND	873	3,596	393	10%	9%	7%
YORKSHIRE AND HUMBER	681	4,092	436	8%	8%	6%
EAST MIDLANDS	657	4,019	521	8%	7%	7%
WALES	549	3,511	436	6%	5%	5%
NORTH	443	3,910	393	5%	5%	4%
EAST ANGLIA	390	3,897	556	5%	4%	4%
NORTHERN IRELAND	560	1,613	570	6%	3%	7%
UK TOTAL	8,616	4,143	569	100%	100%	100%

Note: C-Stores & Standard Shops included - excluding Kiosks

© Experian Limited 2014

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	generalpublicenquiries-uk@shell.com	customer.care@exxonmobil.com
Website	www.bp.com/uk	www.shell.com	www.exxonmobil.co.uk
Head of retail	Neale Smither	David Moss	Duncan Connolly
Number of supplied sites	1,165	1,020	1,005
Number of branded sites	1,165	1,020	1,005
Number of dealers	843	231	513
Number of co-owned sites	322	789	492
Co-owned (direct managed)	250	0	276
Co-owned (franchisee/com-op)	70 (franchise)	752 retail business agreement, 37 other	Alliance (198) and Agency operated (18)
Areas of operation	UK	UK	UK
Fuels supplied (Bio/Premium/LPG)	Diesel, Ultimate Diesel, UL, Ultimate UL, LPG	UL, Diesel, LPG*	UL, Supreme UL, Diesel, Supreme Diesel
Forecourt shop format/brand	BP Connect, BP Express, BP Shop	Select Shops of which 270 are Deli2Go	On the Run (108), Snack and Shop (168)
Tie-ups with other major brands	305 Wild Bean Café and 175 M&S Simply Food	Costa Coffee (650) Waitrose (20 sites)	198 Tesco Express
Major promotions/loyalty scheme	Nectar	Shell Drivers' Club (including partners Avios & Waitrose)	Tesco Clubcard
Number of car washes	593 car wash, 492 jet wash	430	372
Number of sites with LPG	183	223	•
Outside payment terminals	•	203	156
Sites with alcohol licences	664	430	478
Sites with ATMs	973	435	525
Any other comments		* Shell V-Power Nitro Plus UL & Diesel, Shell FuelSave UL & Diesel, regular UL and Diesel.	

Fuel Brand	Texaco	Gulf	UK/Texaco/Scottishfuels/Regent*
Company Name	Valero Energy Ltd	Certas Energy UK Ltd t/a Gulf Retail	Certas Energy UK Ltd
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	0845 4566300	0845 4566300
Email	customercare@valero.com	egham.orders@certasenergy.co.uk	
Website	valero.com, texaco.co.uk, starrewards.co.uk	www.certasenergy.co.uk	www.certasenergy.co.uk
Head of retail	Andrew Cox	Ramsay MacDonald	Ramsay MacDonald
Number of supplied sites	755	565	535
Number of branded sites	805 (including 50 authorised distributor sites)	565	535
Number of dealers	755	556	522
Number of co-owned sites	4	16	13
Co-owned (direct managed)	•	10	13
Co-owned (franchisee/com-op)	Tenant	6	•
Areas of operation	England, Wales and Northern Ireland	UK	UK
Fuels supplied (Bio/Premium/LPG)	Diesel, Premium UL, Supreme UL, Supreme Diesel	UL, Diesel, Endurance UL and Diesel, Flogas	UL, Diesel, Endurance UL and Diesel, Flogas
Forecourt shop format/brand	•	Londis and Costa on COCO sites	Londis and Costa on COCO sites
Tie-ups with other major brands	•	Preferred supplier arrangement with Londis	Preferred supplier arrangement with Londis
Major promotions/loyalty scheme	Star Rewards loyalty programme	Gulf Account Card/Gulf loyalty card	Gulf account card/Gulf loyalty card
Number of car washes	•	5 company owned only	9 company owned only
Number of sites with LPG	•	•	•
Outside payment terminals	•	•	•
Sites with alcohol licences	•	4 company owned only	•
Sites with ATMs	•	4 company owned only	6 company owned only
Any other comments		The above incorporates the network of Total branded dealers (147). Certas Energy continues to expand its customer base and invest in its infrastructure.	* Also Carlton and Power. Data includes details of 13 Shell-branded COCO (company owned company operated) sites acquired in December 2013.

"Our volumes are increasing and growth continues with over 400 Gulf sites. In these challenging times we are the authentic alternative, with resources, ambition, and the team you can trust to grow your business"

Ramsay MacDonald, retail director, Certas Energy UK

Fuel Brand	Tesco	Murco	Morrisons
Company Name	Tesco Stores Ltd	Murco Petroleum	Wm Morrisons Supermarkets plc
Address	New Tesco House, Delamare Road, Cheshunt, Hertfordshire EN8 9SL	4 Beaconsfield Road, St Albans, AL1 3RH	Hilmore House, Gain Lane, Bradford BD3 7DL
Telephone	0800 505555	01727 892400	0845 611 5000
Email	customer.services@tesco.co.uk	enquiries@murco.co.uk	
Website	www.tescopfs.com	www.murco.co.uk	www.morrisons.com
Head of retail	Peter Cattell	Jamie Goodfellow	Mark C Todd
Number of supplied sites	498	456	330
Number of branded sites	498	456	330
Number of dealers	•	228	•
Number of co-owned sites	498	228	330
Co-owned (direct managed)	498	•	330
Co-owned (franchisee/com-op)	•	228 com-op	•
Areas of operation	UK	England, Scotland and Wales	UK mainland (excluding Northern Ireland) and Gibraltar
Fuels supplied (Bio/Premium/LPG)	Tesco UL & Diesel, Tesco Momentum99 Super UL, AdBlue	Super UL, UL, Diesel	UL EN228, Diesel EN590, LPG
Forecourt shop format/brand	473 Tesco Petrol Station Kiosk, 19 Tesco Express	Costcutter, Costcutter Express, Shop Stop	Morrisons
Tie-ups with other major brands	Costa 118	30 Costcutter, 197 Express, 1 Shop Stop, 147 2N's	•
Major promotions/loyalty scheme	Clubcard Fuel Save	Shop-based Costcutter promotions	Morrisons Miles
Number of car washes	Rollover 194, jet wash 143, conveyor 27	89 rollover, 191 jet wash	287 automatic car wash and 341 jet wash
Number of sites with LPG	•	15	71
Outside payment terminals	480	•	2,191
Sites with alcohol licences	19	85 dealer, 212 company owned	18
Sites with ATMs	55	37 dealer, 148 company owned	8
Any other comments	Tesco/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.	The ATMs tend to be at the associated supermarket main stores.

Fuel Brand	Jet	Sainsbury's	Asda
Company Name	Phillips 66 Ltd	Sainsbury's Supermarkets Ltd	Asda
Address	2 Kingmaker Court, Warwick Technology Park, Warwick CV34 6DB	33 Holborn, London EC1N 2HT	Asda House Southbank, Great Wilson Street, Leeds LS11 5AD
Telephone	01926 404000	020 7695 6000	0113 243 5435
Email		via website	jeremy.walton@asda.co.uk
Website	www.phillips66.co.uk	www.sainsburys.co.uk	www.asda.com
Head of retail	Guy Pulham, Tony Reddington	Helen Buck	Jeremy Walton
Number of supplied sites	320	292	234
Number of branded sites	320	292	234
Number of dealers	320	•	•
Number of co-owned sites	•	292	234
Co-owned (direct managed)	•	292	234
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	Scotland and English regions*	UK	UK
Fuels supplied (Bio/Premium/LPG)	UL, Diesel, Super UL	UL, Super UL, Diesel, LPG	UL, Diesel, LPG
Forecourt shop format/brand	147 branded shops	Sainsbury's 292	34
Tie-ups with other major brands	•	Costa in 22 sites	Costa in 8 sites
Major promotions/loyalty scheme	•	Nectar	•
Number of car washes	200	165 Car wash, 95 jet wash	38 rollover
Number of sites with LPG	20	5	14
Outside payment terminals	•	12	1,240
Sites with alcohol licences	•	175	5
Sites with ATMs	•	26	9
Any other comments	* East Anglia, East Midlands, North, South East, West Midlands, Yorkshire & Humber.		

Fuel Brand	Co-operative Food*	Harvest Energy	Pace
Company Name	The Co-operative Group	Harvest Energy Ltd	Certas Energy UK Ltd t/a Pace Fuelcare Ltd
Address	1 Angel Square, Manchester M60 0AG	York House, 45 Seymour Street, London W1H 7JT	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG
Telephone	0161 246 3053	0844 225 3082	0845 4566300
Email	petrol@co-operative.coop	retail@harvestenergy.co.uk	
Website	www.co-operative.coop	www.harvestenergy.co.uk	www.pacefuelcare.co.uk
Head of retail	Michael Fletcher	Simon Davis	Ramsay MacDonald
Number of supplied sites	200	153	131
Number of branded sites	200	110	131
Number of dealers	•	153	131
Number of co-owned sites	200	•	•
Co-owned (direct managed)	200	•	•
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	UK	England, Scotland amd Wales	UK
Fuels supplied (Bio/Premium/LPG)	All retail grades	UL, Super UL and Diesel	UL, Diesel, Endurance UL and Diesel, Flogas
Forecourt shop format/brand	29 Co-operative Food	•	•
Tie-ups with other major brands	•	2 Spar-branded forecourts, Applegreen	Preferred supplier arrangement with Londis
Major promotions/loyalty scheme	Co-operative membership	•	Pace account card/Pace loyalty card
Number of car washes	147	•	•
Number of sites with LPG	24	•	•
Outside payment terminals	•	•	•
Sites with alcohol licences	165	•	•
Sites with ATMs	180	•	•
Any other comments	* Co-operative petrol stations sell fuel under Texaco, Esso, Total, Gulf, Shell and Emo brands.		

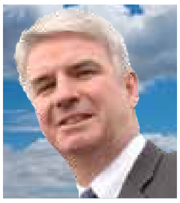
Fuel Brand	Maxol	Rix	Gleaner
Company Name	Maxol Oil Limited	Rix Petroleum Ltd	Gleaner Oils Ltd
Address	48 Trench Road, Mallusk, Co Antrim BT36 4TY	Witham House, 45 Spyvee Street, Hull HU8 7JR	Milnfield, Elgin, Morayshire IV30 1UU
Telephone	028 9050 6000	01482 224422	01343 557400
Email	post@maxol.ie	duncan.lambert@rix.co.uk	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	99	70	66
Number of branded sites	99	60	63
Number of dealers	68	69	52
Number of co-owned sites	31	2	9
Co-owned (direct managed)	4 (all unmanned)	•	9
Co-owned (franchisee/com-op)	25 (licensed), 2 (consignee)	•	•
Areas of operation	Northern Ireland	Yorks, Lincs, central England, E Scotland, E Anglia	NE Scotland, Highlands, West Highlands & Islands
Fuels supplied (Bio/Premium/LPG)	UL, Super UL and Diesel	UL, Diesel, Gas Oil	ULSP, ULSD, Bio Diesel, Bio Ethanol, LPG
Forecourt shop format/brand	•	•	47
Tie-ups with other major brands	Spar on 25 co-owned sites	Spar 10, Londis 10	9
Major promotions/loyalty scheme	•	•	•
Number of car washes	16 rollover, 17 jet wash (co-owned sites)	8	32 jet wash
Number of sites with LPG	•	3	25
Outside payment terminals	23	•	•
Sites with alcohol licences	•	8	23
Sites with ATMs	23	7	•
Any other comments	The outside payment terminal number above includes unmanned sites.	Rix continues to support and attract new sites. It is a family business with family values.	

"There is a big appetite for premium fuels from our customers who want to get the best performance from their vehicles. I'm pleased to say that sales of Shell V-Power Nitro+ continue to grow and the feedback we have is overwhelmingly positive"

David Moss, general manager, Shell Retail, UK & Nordics

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	lenhamilton@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	61	50	47
Number of branded sites	22	13	47
Number of dealers	27	11	47
Number of co-owned sites	1	2	•
Co-owned (direct managed)	1	2	•
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	Nationwide	Northern England	England and Wales
Fuels supplied (Bio/Premium/LPG)	UL, Super UL, Diesel	UL, Super UL, Diesel, Gas Oil, Kerosene	UL, Super UL, Diesel, Gas Oil, Kerosene
Forecourt shop format/brand	•	•	38
Tie-ups with other major brands	Mace on the company owned site	•	Spar, Costcutter, Mace, Londis, Premier and 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	•	•	32
Sites with ATMs	•	•	32
Any other comments		The company is actively seeking dealers to join its network.	NWF is looking for new dealers to take supplies and a retail forecourt package with either: Texaco, Murco, NWF, Lincs, or in Wales only, Dragon.

Fuel Brand	Topaz	Manx Petroleum
Company Name	Topaz Energy Ltd	Manx Petroleum Ltd
Address	Topaz House, Beech Hill, Clonskeagh, Dublin 4, Ireland	PO Box 47, Battery Pier, Douglas, Isle of Man IM99 1DE
Telephone	00 353 1 202 8888	01624 691691
Email	info@topaz.ie	info@manxpetroleums.co.im
Website	www.topaz.ie	www.manxpetroleums.co.im
Head of retail	John Williamson	David Kay / Judith Thomson
Number of supplied sites	37	8
Number of branded sites	37	8
Number of dealers	36	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 loyalty programme	•
Number of car washes	•	5 rollover, 5 jet wash
Number of sites with LPG	1	1
Outside payment terminals	5	1
Sites with alcohol licences	•	3
Sites with ATMs	•	6
Any other comments	The numbers above relate to the Topaz retail network in Northern Ireland only.	



"Valero welcomed 100 new sites in 2013. This record growth is thanks to focusing on retailers' needs – security of supply, quality fuels, industry-leading fuel distribution, competitive pricing and a strong brand"

Andrew Cox, director of sales and marketing, Valero Energy

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	685	1,053	85	16.7%	9.0%	1.8
SPAR / EXPRESS / EUROSPAR	633	734	95	10.7%	8.3%	1.3
SHELL SELECT / DELI2GO	561	583	65	7.5%	7.4%	1.0
BP M&S SIMPLY FOOD	174	1,456	162	5.9%	2.3%	2.6
CO-OPERATIVE / FOOD	245	1,012	123	5.7%	3.2%	1.8
COSTCUTTER / EXPRESS	383	482	62	4.3%	5.0%	0.8
MACE / EXPRESS	398	448	57	4.1%	5.2%	0.8
SAINSBURYS / LOCAL	290	552	60	3.7%	3.8%	1.0
LONDIS / EXPRESS	239	528	72	2.9%	3.1%	0.9
MORRISONS	326	396	37	2.8%	4.3%	0.7
BP CONNECT	130	930	107	2.8%	1.7%	1.6
ESSO SNACK & SHOP	214	526	56	2.6%	2.8%	0.9
BP SHOP	202	512	58	2.4%	2.7%	0.9
ESSO ON THE RUN	108	899	103	2.2%	1.4%	1.6
SHELL SHOP	173	462	52	1.8%	2.3%	0.8
SHOP'N DRIVE	135	445	55	1.4%	1.8%	0.8
NISA / LOCAL / EXTRA	73	795	124	1.3%	1.0%	1.4
PREMIER / EXPRESS	108	482	75	1.2%	1.4%	0.8
BUDGENS	38	1,275	159	1.1%	0.5%	2.2
OTHER FASCIAS	949	391	51	8.6%	12.5%	0.7
UNBRANDED	1,541	289	44	10.2%	20.3%	0.5
UK TOTAL	7,605	569	67	100.0%	100.0%	1.0

Note: C-stores & standard shops included – excluding kiosks. Note: Showing shop facias with market share >1.0%

© Experian Limited 2014

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	1,173	931	128	50.7%	24.3%	2.1
STANDARD	3,390	311	41	49.0%	70.2%	0.7
KIOSK	267	30	12	0.4%	5.5%	0.1
NO SHOP	511	●	●	●	●	●
UK TOTAL	5,341	444	61	100%	100.0%	1.0

© Experian Limited 2014

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	528	409	340	5
CERTAS ENERGY	342	291	116	4
ESSO	351	260	221	1
FOOD STORE	21	16	7	0
GLEANER	24	24	0	0
HARVEST ENERGY	50	42	18	0
JET	195	163	88	2
MAXOL	46	45	11	0
MINOR BRAND	54	44	17	1
MURCO	64	62	9	0
RIX	4	4	0	1
SHELL	132	119	62	1
SOLO	19	19	1	0
STAR	19	16	9	0
TEXACO	462	382	205	5
THAMES	21	21	0	0
TOPAZ	12	12	3	0
UNBRANDED	161	144	37	0
UK DEALER TOTAL	2,505	2,073	1,144	20

© Experian Limited 2014

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	841	3,654	27.2%	15.7%	1.7
TEXACO	802	2,626	18.7%	15.0%	1.2
ESSO	511	2,973	13.5%	9.6%	1.4
CERTAS ENERGY	1,023	1,356	12.3%	19.2%	0.6
JET	314	2,569	7.2%	5.9%	1.2
SHELL	234	3,437	7.1%	4.4%	1.6
UNBRANDED	727	728	4.7%	13.6%	0.3
HARVEST ENERGY	106	2,357	2.2%	2.0%	1.1
MURCO	225	1,089	2.2%	4.2%	0.5
MINOR BRAND	201	850	1.5%	3.8%	0.4
MAXOL	72	1,302	0.8%	1.3%	0.6
FOOD STORE	37	1,785	0.6%	0.7%	0.8
TOPAZ	36	1,593	0.5%	0.7%	0.8
STAR	36	1,314	0.4%	0.7%	0.6
SOLO	49	877	0.4%	0.9%	0.4
GLEANER	55	698	0.3%	1.0%	0.3
THAMES	35	805	0.2%	0.7%	0.4
RIX	37	629	0.2%	0.7%	0.3
UK DEALER TOTAL	5,341	2,114	100.0%	100.0%	1.0

© Experian Limited 2014

UK DEALER FORECOURT SHOP MARKET BY FUEL BRAND

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	840	644	78	25.3%	18.4%	1.4	8.2	176
TEXACO	783	592	76	21.6%	17.2%	1.3	7.8	222
CERTAS ENERGY	758	336	52	11.9%	16.6%	0.7	6.4	199
ESSO	509	487	63	11.5%	11.2%	1.0	7.6	162
JET	312	394	54	5.8%	6.8%	0.8	7.3	153
SHELL	231	529	71	5.6%	5.1%	1.1	7.4	152
UNBRANDED	423	250	45	4.9%	9.3%	0.5	5.5	242
MURCO	189	288	51	2.5%	4.1%	0.6	5.7	241
MAXOL	67	821	80	2.5%	1.5%	1.7	10.3	593
MINOR BRAND	117	343	54	1.9%	2.6%	0.7	6.4	283
HARVEST ENERGY	103	367	51	1.8%	2.3%	0.8	7.1	153
TOPAZ	35	723	84	1.2%	0.8%	1.5	8.6	445
STAR	36	604	65	1.0%	0.8%	1.3	9.3	460
FOOD STORE	35	557	77	0.9%	0.8%	1.2	7.2	331
SOLO	44	403	51	0.8%	1.0%	0.9	7.9	437
GLEANER	36	203	48	0.3%	0.8%	0.4	4.2	240
RIX	16	324	47	0.2%	0.4%	0.7	6.9	319
THAMES	29	158	33	0.2%	0.6%	0.3	4.8	171
UK DEALER TOTAL	4,563	468	63	100.0%	100.0%	1.0	7.4	195

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

© Experian Limited 2014

"Overall, the optimistic position we adopted in the 2013 Fuel Market Review has generally been borne out and there are other positive issues continuing into 2014"

Arthur Renshaw, UK and Ireland manager for Experian Catalist

SITE NUMBERS BY BRAND

BRAND	NUMBER OF SITES		
MAY	2012	2013	2014
24HR	●	1	●
3D	2	2	2
AMCO	1	1	1
ANGLO	5	4	3
APPLEGREEN	10	11	14
ASDA	195	218	233
BATA	2	2	2
BATES & HUNT	4	4	●
BAXTER JOHNSTON	2	1	1
BECA	1	1	1
BFL	5	4	5
BP	1,175	1,211	1,162
BRENNANS	●	1	1
BRIDGE FUELS	●	1	●
BROADLAND FUELS	3	3	3
BROBOT	1	1	●
BUTLER	15	12	11
BWOC	20	17	16
CALLOW	3	2	3
CARLISLES	●	1	1
CARLTON	8	8	10
CENTRA	4	2	1
CLUB	3	2	2
COOKE	4	3	3
CO-OP	1	●	12
COSTCO	●	●	1
COSTCUTTER	6	3	3
CPL	2	2	●
CRANSTON FUELS	1	1	1
DAY TODAY	2	1	1
DEANS	1	●	●
DISCOUNT FUELS	1	1	1
DRAGON	9	7	9
EMO	9	14	19
EP	1	1	1
ESSO	867	889	994
EURO OIL	1	1	1
EUROSPAR	●	1	1
EVESONS	1	●	●
EXPRESS	2	1	●
FLARE	7	8	7
GB	8	8	7
GLEANER	68	66	64
GLOBE	1	1	1
GO	17	17	16
GULF	305	353	461
HARVEST ENERGY	83	107	106
HAVEN	1	1	1
HELTOR	6	6	6

BRAND	NUMBER OF SITES		
MAY	2012	2013	2014
HIGHLAND	11	9	8
HILLSIDE	1	1	1
HT	1	1	1
IMPERIAL	11	10	7
JET	327	312	314
JET (EMO)	8	1	●
K9	1	1	1
KELTIC	3	3	1
KP	1	1	1
LIME	●	2	4
LINCOLNSHIRE FUELS	3	3	3
LOCAL	1	2	2
LONDIS	2	1	●
MAC	●	1	1
MACE	4	2	2
MAJOR	1	1	1
MALJEE	3	●	●
MANX	8	8	8
MARTINDALES	1	1	●
MAXOL	101	104	102
MFS	1	1	1
MINSTER	2	2	2
MITCHELL & WEBBER	1	1	1
MOCO	1	●	●
MORGAN	●	3	3
MORRISONS	301	314	331
MURCO	436	450	454
NATIONAL	14	12	●
NISA	3	2	1
NORTHERN ENERGY	2	2	2
NWF	7	7	8
OAK	7	6	7
OIL4WALES	9	16	16
ONE	7	7	6
PACE	135	132	165
PARK & SHOP	3	2	●
PEVA	1	1	1
PHOENIX	2	2	●
POWER	73	79	67
PRAX	3	3	3
PRINCE	2	2	2
PROTEUS	11	12	11
RANGEHILL	1	1	1
REGENCY OILS	6	6	6
REGENT	23	19	21
REPSOL	1	1	1
RIX	41	36	37
SAINSBURYS	265	286	295
SCOTTISH FUELS	23	23	32

BRAND	NUMBER OF SITES		
MAY	2012	2013	2014
SCOTTISH ISLAND FUELS	●	●	14
SEVERN FUELS	1	1	1
SHELL	839	1,032	1,019
SHOP LOCAL	1	1	1
SOLO	23	32	49
SPAR	11	7	8
SPOT	7	6	6
SPUR	2	2	2
STAR	32	36	36
TATE	4	4	4
TESCO	292	294	290
TESCO EXPRESS	19	19	19
TESCO EXTRA	181	184	190
TEXACO	852	800	802
THAMES	35	39	36
THRUST	6	5	2
TODAYS EXTRA	1	1	●
TOP	10	12	13
TOPAZ	22	28	36
TORQ	12	14	14
TOTAL	770	393	160
TOTAL (RONTEC)	●	●	12
UK	95	85	63
UNBRANDED	663	662	687
UNITED	7	4	4
VIVO	9	6	5
WAITROSE	14	●	●
WATSON	1	1	1
WCF	31	26	21
XL STOP & SHOP	5	2	2
TOTAL	8,677	8,590	8616

Catalist UK Database May 2014 *© Experian Limited 2014*