Fuel Market Review 2011

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

Once again Experian Catalist is pleased to be able to provide Forecourt Trader with the UK summary for its Fuel Market Review 2011. The data shown in the following tables is from Experian Catalist's latest release of its UK database in April for the first quarter 2011.

Summary

Last year I concluded with "The one certain thing is that when we come to look at the market for the Forecourt Trader Fuel Market Review in 2011 there will have been a lot more changes and there will almost certainly have been even more surprises".

Well, there have been lots of surprises and it is apparent that quite a number of the decisions made over the past 12 months will have significant long-term effects on the retail forecourt sector.

During the first week in April there were a few headlines in the press that speak for the year. The Financial Times headline on April 5 screamed "Oil price reaches a sterling record", and this was during the week that some car drivers in Bradford had been able to buy unleaded at an unmanned Asda site for 12.9ppl rather than 129.9ppl (we think that this was a mistake rather than a publicity stunt but it certainly made the tabloids happy!). On a different note only a couple of days before, the Sunday Times was profiling Snax 24's Gerald Ronson who made the comment that "There will be big opportunities in petrol retailing in the next three to five years". Gerald opened his first Heron forecourt 45 years ago in St Albans and even now, aged 71, he is still able to surprise the industry. I guess we would all like a look into Gerald's crystal ball!

Following the theme of the last three annual Fuel Market Reviews, the retail price of petrol and diesel has continued to make regular news with new high-price records being

set. As I write this we are at yet another record high and, after a brief fall last summer, we have seen a steady increase in fuel prices – as shown in the chart on page 25. Between May 2010 and May 2011, the price of unleaded has increased by 16ppl, with diesel increasing by 20ppl. The press and consumers' focus on pump prices for much of the past year has caused a continuing squeeze on margins. It came as a surprise to many when the government abandoned its scheduled Budget duty increase in March and actually reduced the

UK MARKET BREAKDOWN Table 1

SHARE BRAND	% MARKET SHARE	NO OF OUTLETS	AV VOL (KL PA)	% OUTLET SHARE	MKT EFFECT-IVENESS
TESCO	15.1%	476	11,715	5.4%	2.8
BP	14.8%	1,169	4,631	13.3%	1.1
SHELL	12.4%	876	5,176	10.0%	1.2
ESSO	10.6%	899	4,297	10.3%	1.0
MORRISONS	9.0%	295	11,165	3.4%	2.7
SAINSBURYS	8.7%	262	12,091	3.0%	2.9
TOTAL	7.3%	918	2,896	10.5%	0.7
TEXACO	6.3%	883	2,609	10.1%	0.6
ASDA	4.8%	187	9,409	2.1%	2.2
JET	2.8%	375	2,747	4.3%	0.7
MURCO	2.1%	412	1,865	4.7%	0.4
UNBRANDED	1.6%	790	719	9.0%	0.2
GULF	0.8%	212	1,461	2.4%	0.4
MINOR	1.1%	329	5,469	3.7%	1.3
MAXOL	0.5%	99	1,690	1.1%	0.4
CO-OPERATIVE	0.5%	32	5,192	0.4%	1.2
FOOD STORE	0.4%	63	2,496	0.7%	0.6
PACE	0.4%	144	1,079	1.6%	0.3
GB OILS	0.4%	228	654	2.6%	0.2
GLEANER	0.2%	72	931	0.8%	0.2
RIX	0.1%	44	676	0.5%	0.2
UK TOTAL	100.0%	8,765	4,161	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	2,198	4,695	28.3%	25.1%	1.1
DEALER	5,301	2,295	33.3%	60.5%	0.6
HYPERMARKET	1,266	11,112	38.4%	14.4%	2.7
UK TOTAL	8,765	4,161	100%	100.0%	1.0

© Experian Catalist 2011 (Tables 1-5)

duty by 1ppl. Thanks may be due to Brian Madderson and the RMIP for their sterling work in this area. However, with the cost of product rising steadily at the same time, the 1p reduction was soon wiped out, with the resulting additional criticism from the government, press and consumer pressure causing a further squeeze on margins for many. Behind the duty reduction the same Budget announced that there would be a 3ppl duty increase on January 1, 2012, plus further increases linked to RPI in August 2012.

According to Brian Madderson, this alone could result in an 8ppl increase during 2012. That is without any changes to cost of product and who knows what the future holds on that score. The trouble in the Middle East has merely added to the uncertainty, and even the experts do not agree on which direction prices will go over the next 12 months.

Other government initiatives on the 'fair fuel stabiliser and the fuel duty discount for remote areas have moved out of the headlines and we all wait to see what – if anything – they amount to. Finally on prices, the EU has announced a plan to change the whole basis of fuel tax so it is based on energy content. It is proposing to set minimum tax levels on diesel. However I'm sure it comes as no surprise to you that the proposed minimums are far below what we currently levy on diesel in the UK.

The UK has eight operational refineries that supply the 8,765 open forecourts across the country.

Over the past 12 months announcements have been made about the future of five of these refineries with the consequences on the associated retail networks.

- **Stanlow:** The UK's second largest refinery (supplying some 17% of UK petrol) and Shell's only UK refinery has finally been sold to the Indian-based Essar Group for a reported £1.3bn. The Shell retail network of 876 sites (573 company-owned and 303 dealers) is not part of the deal.
- **Pembroke:** Chevon's refinery, together with the Texaco brand in the UK, has been sold to Valero – a US-based energy company. So far Valero has announced that it will be "business as usual" and it will be retaining the Texaco brand in the UK. Indeed much of the Texaco network of 883 dealer sites is continuing with the Shining Star upgrade.
- **Milford Haven:** The Murco refinery and retail network of 412 sites (174 co-owned sites and 238 dealers) is on the market. Announcements about the future are imminent but the Murco team is carrying on as much as it can with "business as usual".
- **Grangemouth:** PetroChina has reportedly acquired a 50% stake in the INEOS refinery that supplies product to most of Scotland's 907 sites.
- **Lindsey:** Total put its refinery and retail network of 918 sites (492 co-owned and 426 dealers) on the market last year and in early April a consortium headed by Snax 24 (Gerald Ronson) was announced as the preferred bidders. Snax 24 currently appears at number three in

UK FUEL/SHOP COMPARISON Table 3

SHARE BRAND	NO OF OUTLETS	AV VOL(L/PA) PER M2 PLOT SIZE	AV SHOP SALES (£) PER M2 SHOP AREA	SHOP SALES (£) PER 000 LITRES
ASDA	187	4.7	10.0	6
BP	1,169	2.0	8.4	167
CO-OPERATIVE	32	1.9	8.8	232
ESSO	899	2.1	10.4	222
FOOD STORE	63	1.6	7.3	252
GB OILS	228	0.6	5.6	163
GLEANER	72	0.9	4.3	122
GULF	212	1.1	6.0	151
JET	375	1.7	7.7	130
MAXOL	99	1.1	9.2	539
MINOR BRAND	329	3.5	21.1	772
MORRISONS	295	4.8	10.6	34
MURCO	412	1.3	6.9	164
PACE	144	0.9	5.5	134
RIX	44	0.8	6.4	163
SAINSBURYS	262	5.6	9.5	47
SHELL	876	2.3	8.5	105
TESCO	476	5.5	11.0	42
TEXACO	883	1.6	7.3	183
TOTAL	918	1.6	7.8	150
UNBRANDED	790	0.7	5.2	203
UK TOTAL	8,765	2.3	8.4	118

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	2198	4,695	8.1	2,198	100%	57%
DEALER	5301	2,295	6.4	1,556	90%	49%
HYPERMARKET	1266	11,112	11.5	2,223	86%	66%
UK TOTAL	8,765	4,161	7.6	1,812	92%	53%

DISTRIBUTION BY REGION Table 5

UK STANDARD REGION	NO OF OUTLETS	AV VOLUME (KL PA)	% OUTLETS	% FUEL VOLUME	% SHOP SALES
EAST ANGLIA	404	3,948	5%	4%	4%
EAST MIDLANDS	677	4,014	8%	7%	7%
NORTH	440	3,759	5%	5%	3%
NORTH WEST	781	4,813	9%	10%	8%
NORTHERN IRELAND	544	1,660	6%	2%	8%
SCOTLAND	907	3,463	10%	9%	7%
SOUTH EAST	2,148	5,227	25%	31%	34%
SOUTH WEST	887	3,894	10%	9%	9%
WALES	548	3,530	6%	5%	5%
WEST MIDLANDS	741	4,489	8%	9%	9%
YORKSHIRE AND HUMBER	688	4,057	8%	8%	6%
UK TOTAL	8,765	4,161	100%	100%	100%

Despite all the economic woes, and the focus on fuel prices, 2010/11 has continued where the previous year left off, with the forecourt and convenience market remaining generally positive

Arthur Renshaw, UK & Ireland manager, Experian Catalist

the Forecourt Trader Top 50 Indies list with 75 sites, so to take on 918 Total sites is likely to be quite a challenge.

There are three other refineries apparently not 'up for sale' but the aforementioned changes leave only two of the remaining refineries owned and operated by the traditional oil companies – Esso Fawley and Conoco (Jet) Killingholme. Of the 20 major brands in fuel retailing in the UK, only Esso and Jet will now have an associated refinery.

There is one significant company that is a big player in the supply to the UK retail market that has not been mentioned so far and currently doesn't appear in the list of forecourt brands – Greenergy. Greenergy is 36% owned by Tesco and is likely to be a company to watch over the next 12 months.

Despite all the economic woes and the focus on fuel prices, 2010/11 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 volume 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 full year 2010 were at 99% of 2009 levels. Q1 2010 is showing at 97.6% compared to Q1 2009. The figures show a few percentage points increase in diesel volumes and a commensurate decrease in petrol volumes.

However, it is true to say that at the macro level, the combined effect of fuel efficiencies, environmental legislation, fuel prices and social trends, is beginning to have an impact on total fuel demand and the unknown quantity is by how much and how fast demand falls away over the coming years.

One area that current forecourt retailers shouldn't be too concerned about is the growth of electric vehicles. A recent presentation I saw suggested that by 2014 we will have 0.3% of our cars powered by electriciy – that's 85,000 in the UK. So you will be lucky to even see one among the 34 million vehicles on our roads. In 2010 there were 2.4 million new vehicles requiring petrol or diesel added to the car population.

From a property perspective values are remaining relatively robust and certainly they are holding up better than in most other sectors.

While there have been fewer transactions mainly due to lack of available funding, there are many in the independent sector who can find the money for the right deal.

According to a number of the agents through 2010/11, the lease market has been particularly busy. Compared to high-street retail the forecourt sector has still not had any failures of any of the major players, and we have seen new-to-industry and rebuilt sites coming on stream right through the period.

As usual at the various industry events 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 – Manx Petroleum, which has taken over the former Shell sites on the Isle of Man; and Oil4Wales with a number of dealer sites in the South.

Attendances at the IFFE show were good and a flick through Forecourt Trader will tell you that there are still a lot of people out there optimistic about the future and looking to buy – although putting this into practice has proved to have been more difficult over the past year or so with more detailed investigations and due diligence required.

As we have said before, to the outside world the UK forecourt market may be mature with not much going on, but to the readers of Forecourt Trader the market is in continuous flux, with changes occurring right across the sector almost on a daily basis.

For example, there were 200 closures, 45 new-builds, 36 sites re-opened, 50 sites changed from oil co-owned to dealer-owned and over 560 sites that changed fuel supplier brand in 2010/11.

Experian Catalist will continue to monitor and survey the UK market in order to supply up-to-date information and will continue to provide regular summaries to the industry. When we come to look at the data for the Forecourt Trader Fuel Market Review for 2012 there will have been a lot more changes and even more surprises but I am sure the industry will continue to adapt and re-invent itself.

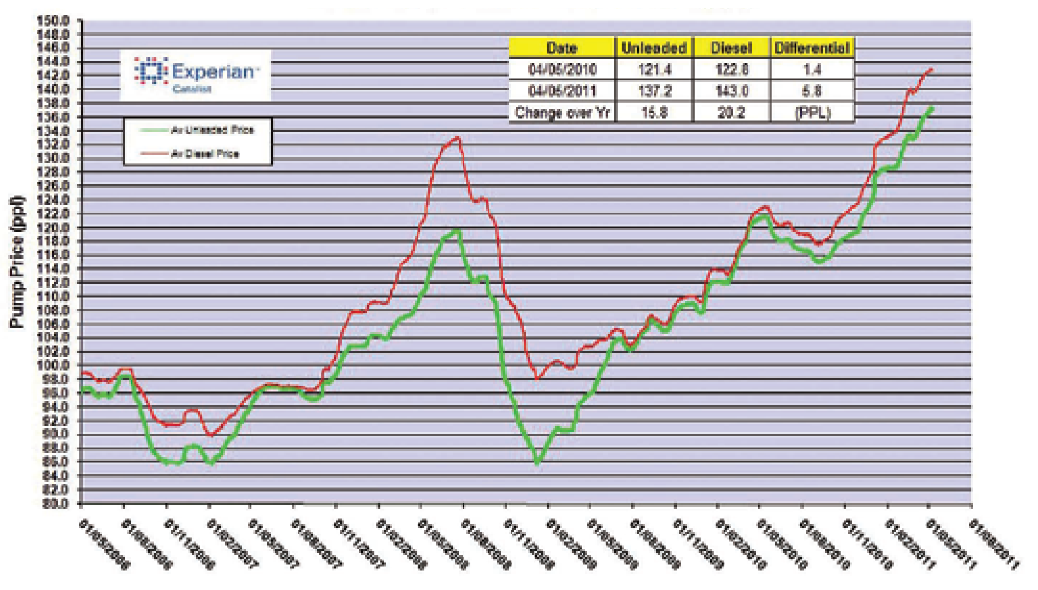
Market structure

Compared to the Forecourt Trader Fuel Market Review 2010, we see that UK site numbers have declined by a further net 119 sites and we are now reporting 8,765 open retail sites in the UK with an average fuel volume of almost 4.2mlpa, and shop sales of £535,000 a year.

We have seen a reverse of the trend of the past few years with a significant decrease in the number of sites closing to 200 (375 in last year's Review).

Of these closures, 187 were dealer sites and they were fairly evenly distributed across the

UK AVERAGE RETAIL PUMP PRICES (ppl)



"During the period we also saw the opening of around 45 'new-build' forecourts in the UK, significantly up on the previous two years – 36 by the multiple retailers, two new co-owned and seven new dealer sites"

Arthur Renshaw, UK & Ireland manager, Experian Catalist

UK with 60 of these coming from the unbranded sector.

During the period we also saw the opening of around 45 new-build forecourts in the UK, significantly up on the numbers in the previous two years – 36 by the multiple retailers, two new company-owned sites and seven new dealer sites.

A couple of years ago we saw the start of a trend towards bringing back on-stream former closed or obsolete sites. With the high market prices of forecourts and the issues with planning for brand new sites, it was sometimes the easier option to find a former site and to redevelop it.

In the previous Review we saw 57 sites re-open and last year we recorded another 36 closed or obsolete sites being re-opened – 31 by the independent dealer sector.

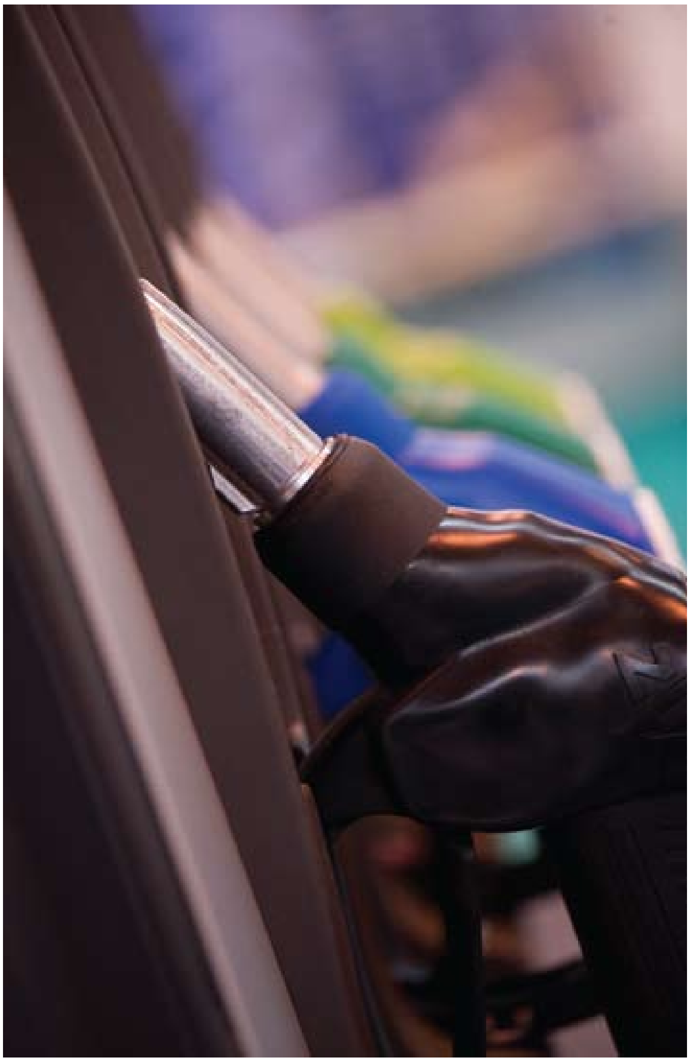
There are now 5,301 independent dealer sites in the UK, with something approaching 30% of these sites being operated by dealer groups with three sites or more. The average dealer site now sells 2.3mlpa and turns over £8,000 per week through the 59sq m shop – no significant change from the previous year.

With over 14% (1,266) of the sites the multiple retailers have gained further market share and now control over 38% of motor fuel sales and they are the single largest sector. The dealer sector has 61% of the sites and 33% market share.

The regional breakdown of the forecourt sector continues to make interesting reading with the market dominated by the south east, which has a quarter of the sites and 31% of the UK's motor fuel and 34% of forecourt shop sales concentrated there.

Esso has had its network in Scotland on the market for a while so there may be changes there at some time in the near future.

The joint ventures between the oil companies and the multiple retailers has been steady over the past year with no real change.



Market shares and brands

Probably the biggest single change at the operational end of the retail market is that we are now reporting Tesco as the number-one fuel retailer in the UK – it has overtaken BP with a retail fuel market share of 15.1% from its 478 sites.

Tesco has continued its relentless drive forward with 25 new forecourts last year; Asda has continued with five new sites – all unattended; Sainsburys with six new sites; and Morrisons with two. Looking at the brand profiles in Table 1 Gulf added 40 sites to its network last year compared to a net loss of 147 sites by Texaco and 49 by Shell. We also started reporting Harvest Energy, which moved up to show 30 sites. The unbranded sites took less of a hit last year with the loss of only 19 sites, down to 790 but they remain most vulnerable to the continued squeeze on margins and to the pressures on the environmental factors surrounding forecourt operation.

As reported in Forecourt Trader, the DCC subsidiary GB Oils has made an agreed offer to MRH for the Pace brand, so it is likely that, at some point, subject to government approval, the 144 Pace-branded dealer sites will become part of the GB Oils stable alongside Gulf, Scottish Fuels, UK, Carlton et al.

In the dealer sector Texaco has lost a lot of sites but it is still the major supplier with 883 dealer sites, closely followed in second place by BP with 863 up by 21, and by Total in third place with 426 sites – no change to the previous year.

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 sector, shop sales are close to £2bn per year with the average dealer forecourt shop of 59sq m now turning over close to £425,000 a year. Within the dealer sector 84% of sites have a shop and 20% of the sites (1,050) now have a full convenience store.

As expected, the number of sites with alcohol licences and ATM machines has continued to grow, with 42% of dealer sites now having an ATM and 33% now holding an alcohol licence.

The delay in the tobacco display ban will come as a welcome relief to the forecourt sector, with smaller retailers now having until April 2015 before the ban comes into effect.

Forecourt Trader awards

As many of you who go to the Forecourt Trader of the Year Awards will know, Northern Ireland continues to be at the forefront of the forecourt shop market and this is again illustrated by the select band of Maxol dealers in Northern Ireland who have the highest average shop sales at over £1m a year.

Finally, whatever happens in the shop sector you can be sure that all the suppliers will be looking towards the Olympics in August 2012 as the biggest promotional opportunity for many years and so by this time next year, we should all be excited about what lies ahead and hopefully the Olympics will give a boost to the retail forecourt sector right across the UK.

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	Esso	Shell
Company Name	BP	Esso Petroleum Company	Shell UK Retail
Address	Witan Gate House, Witan Gate, Milton Keynes, MK9 1ES	ExxonMobil House, Ermyn Way, Leatherhead, Surrey KT22 8UX	Rourke House, Waterman's Business Park, The Causeway, Staines TW18 3BA
Telephone	01908 853000	01372 222000	01784 897800
Email	careline@bp.com		
Website	www.bp.com	www.exxonmobil.co.uk	www.shell.co.uk
Head of retail	Neale Smither	Karen Dickens	Melanie Lane
Number of supplied sites	1,171	910	870
Number of branded sites	1,171	910	870
Number of dealers	846	320	298
Number of co-owned sites	325	590	572
Co-owned (direct managed)	241	346	•
Co-owned (franchisee/com-op)	41 Quantum, 38 franchise operated, 5 dealer operated	198 alliance, 28 agency, 18 motorway	572 multi-site operator agreement
Areas of operation	UK	UK	UK
Fuels supplied (bio/premium/LPG)	BP Ultimate, UL, diesel	Energy supreme, Energy UL, Energy diesel	Fuelsave UL, V-Power UL, Fuelsave & V-Power diesel
Forecourt shop format/brand	BP Connect, BP Express, M&S Simply Food, Wild Bean	238 Snack & Shop, 108 On The Run	572 shops
Tie-ups with other major brands	M&S Simply Food	198 Tesco Express, 87 Costa Coffee (On The Run)	250 Coffee Republic
Major promotions/loyalty scheme	Nectar	Driver Cash Rewards (motorways only)	Shell Drivers' Club
Number of car washes	514 car wash, 374 jet wash	160	128 rollover, 135 jet wash
Number of sites with LPG	142	•	165 (co-owned), 32 (dealer)
Outside payment terminals	•	95	243
Sites with alcohol licences	299	211 (excluding alliance sites)	69
Sites with ATMs	353	267	348
Any other comments			

Fuel Brand	Gulf/UK/Texaco/Scottish Fuels	Total	Texaco/Regent Oil
Company Name	GB Oils	Total UK	Chevron
Address	302 Bridgewater Place, Birchwood Park, Warrington, Cheshire WA3 6XG	40 Clarendon Road, Watford WD17 1TQ	1 Westferry Circus, Canary Wharf, London E14 4HA
Telephone	0845 456 6300	01923 694000	0207 719 3000
Email	kjewers@gulfoil.co.uk	customercare@total.co.uk	ukirelandcustomercare@chevron.com
Website	www.gulfoil.co.uk	www.total.co.uk	www.texaco.co.uk
Head of retail	Keith Jewers	Richard Laden	Brian Worrall
Number of supplied sites	832	809	710
Number of branded sites	517	809	845 (incl 135 authorised distributor sites)
Number of dealers	830	320	701
Number of co-owned sites	2	489	9
Co-owned (direct managed)	2	223	•
Co-owned (franchisee/com-op)	•	Cogop, com-op	9 dealer operated
Areas of operation	UK	England, Wales, Scotland	England, Wales & Northern Ireland
Fuels supplied (bio/premium/LPG)	Endurance super UL, UL, diesel	Excellium UL & diesel, LPG, UL, diesel	Premium, super & supreme UL, supreme diesel, diesel
Forecourt shop format/brand	•	167 Bonjour, 45 Spar, 250 Night & Day	•
Tie-ups with other major brands	•	45 Spar	•
Major promotions/loyalty scheme	•	Total Rewards	Star Rewards, Business and Fastfuel cards
Number of car washes	•	295 rollover, 345 jet washes	•
Number of sites with LPG	•	31	1
Outside payment terminals	•	•	•
Sites with alcohol licences	•	288	•
Sites with ATMs	•	323	•
Any other comments	GB Oils says it continues to expand the Gulf brand and, with more than 100 site conversions in 12 months, it is the largest supplier to independents.		Chevron says the Texaco brand has a long heritage of quality, performance and trust which is demonstrated by consistently providing high-quality fuel products.

"The Texaco brand has a long heritage of quality, performance and trust, which is demonstrated by consistently providing high-quality fuel products and the recent introduction of the refreshed brand image"

Brian Worrall, general manager sales & marketing Europe, Chevron

Fuel Brand	Tesco	Murco	Jet
Company Name	Tesco	Murco Petroleum	ConocoPhillips
Address	New Tesco House, Delamare Road, Cheshunt EN8 9SL	4 Beaconsfield Road, St Albans, Herts AL1 3RH	2 Kingmaker Court, Warwick Technology Park, Gallows Hill, Warwick CV34 6DB
Telephone	0800 505555	01727 892400	01926 404000
Email	customer.services@uk.tesco.com	murco_uk@murphyoilcorp.com	retailer.dealeradmin@conocophillips.com
Website	www.tesco.com/petrolstation	www.murco.co.uk	www.conocophillips.co.uk, www.jetlocal.co.uk
Head of retail	Philip Clarke	Jeremy Clarke	Patrick Hudson
Number of supplied sites	493	459	376
Number of branded sites	493	459	376
Number of dealers	•	225	376
Number of co-owned sites	493	234	•
Co-owned (direct managed)	493	•	•
Co-owned (franchisee/com-op)	•	234 com-op	•
Areas of operation	UK and Ireland	England, Scotland, Wales	England, Scotland
Fuels supplied (bio/premium/LPG)	UL 95, Momentum 99 super UL, diesel, AdBlue, LPG	Super UL, premium UL, low sulphur diesel	Super UL, UL, diesel
Forecourt shop format/brand	480 Tesco	216 Costcutter, 18 Checkout/Shopstop	•
Tie-ups with other major brands	•	216 Costcutter	•
Major promotions/loyalty scheme	Tesco Clubcard, occasional 5ppl promo	Shop-based Costcutter promotions	Fuelling the local community, Merlin 2 for 1
Number of car washes	194 rollover, 126 jet wash, 27 conveyor	72 rollover, 186 jet wash	•
Number of sites with LPG	4	9	•
Outside payment terminals	5,632 across 475 sites	•	•
Sites with alcohol licences	23	206	•
Sites with ATMs	55	134	•
Any other comments		Murco is actively looking to recruit new dealers to its brand.	Jet also runs the annual Aim4Success awards recognising dealers' commitment to high levels of service, safety, training and communication in the community.

Fuel Brand	Morrisons	Sainsbury's	Co-operative
Company Name	Morrisons	Sainsbury's Supermarkets	The Co-operative Group
Address	Hilmore House, Gain Lane, Bradford BD3 7DL	33 Holborn, London EC1N 2HT	Dantzic House, Dantzic Street, Manchester M60 4ES
Telephone	0845 611 5000	0207 695 6000	0161 246 3053
Email			petrol@co-operative.coop
Website	www.morrisons.co.uk	www.sainsburys.co.uk	www.co-operative.coop
Head of retail	Mark Todd	Ria Konkon	Kay Wheelton
Number of supplied sites	296	262	220
Number of branded sites	296	262	220
Number of dealers	•	•	•
Number of co-owned sites	296	262	220
Co-owned (direct managed)	296	262	220
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	England, Wales, Scotland, Gibraltar	UK	UK
Fuels supplied (bio/premium/LPG)	UL, diesel, LPG	UL, super UL, diesel, LPG	All retail grades
Forecourt shop format/brand	296 Morrisons	262 Sainsbury's	220 Co-operative Food
Tie-ups with other major brands	•	21 Coffee Nation	•
Major promotions/loyalty scheme	Morrisons Miles	Nectar	Co-operative membership
Number of car washes	260 rollover, 293 jet wash	178 rollover, 70 jet wash	170
Number of sites with LPG	59	7	25
Outside payment terminals	1,813	9	•
Sites with alcohol licences	•	170	165
Sites with ATMs	•	26	180
Any other comments			The Co-operative bought rival Somerfield in 2008 and all sites have now been rebranded Co-op.

"Our founding principles of honesty, flexibility and seeking solutions with mutual reward will find a resonance with many new customers"

Philip Wharton, general manager, Pace Fuelcare

Fuel Brand	Asda	Pace	Power
Company Name	Asda Stores	Pace Fuelcare	Power Petroleum
Address	Great Wilson Street, Leeds LS11 5AD	Hanover House, 18 The Avenue, Egham TW20 9AB	Sovereign House, Bayshill Road, Cheltenham, Gloucestershire GL50 3BA
Telephone	01132 435435	01784 484444	0845 078 0888
Email	jeremy.walton@asda.co.uk	dealers@pacefuelcare.co.uk	rm.power-totalbutler@total.co.uk
Website	www.asda.com	www.pacefuelcare.co.uk	www.powerfuels.co.uk
Head of retail	Jeremy Walton	Philip Wharton	Nick Wright
Number of supplied sites	187	170	139
Number of branded sites	187	131	96
Number of dealers	•	131	96
Number of co-owned sites	187	•	•
Co-owned (direct managed)	187	•	•
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	UK	Midlands, East Anglia, Wales, Scotland, South England	England & Wales
Fuels supplied (bio/premium/LPG)	UL, diesel, LPG	Premium, bio, diesel, kerosene, gas oil	UL, diesel, super UL
Forecourt shop format/brand	22 shops	•	•
Tie-ups with other major brands	•	•	•
Major promotions/loyalty scheme	•	•	Totalcard
Number of car washes	34 rollover	•	•
Number of sites with LPG	14	•	•
Outside payment terminals	866	•	•
Sites with alcohol licences	•	•	32
Sites with ATMs	•	•	27
Any other comments		Pace Fuelcare is rolling out enhancements to its dealer business support based on lessons learned from listening to the needs and experiences of its customers.	Power is owned by Total UK and offers flexible packages to the independent dealer, including features such as the Total card and Total lubricants.

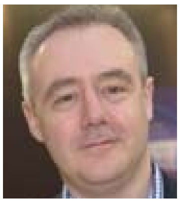
Fuel Brand	Maxol	Rix	WCF/Texaco
Company Name	Maxol Oil	Rix Petroleum	WCF
Address	48 Trench Road, Mallusk, Newtownabbey, Co Antrim BT36 4TY	Witham House, Spyvee Street, Hull HU8 7JR	Crawhall, Brampton, Cumbria CA8 1TN
Telephone	02890 506000	01482 838383	01697 745050
Email	post@maxol.ie	duncan.lambert@rix.co.uk	
Website	www.maxol.ie	www.rix.co.uk	www.wcf.co.uk
Head of retail	Brian Donaldson	Duncan Lambert	Local representation in each area
Number of supplied sites	100	81	80
Number of branded sites	100	80	25
Number of dealers	72	79	24
Number of co-owned sites	28	2	1
Co-owned (direct managed)	•	1	1
Co-owned (franchisee/com-op)	28 licensed	1	•
Areas of operation	Northern Ireland & Republic of Ireland	Yorks, Lincs, central England, E Scotland, E Anglia	Northern England, East Midlands
Fuels supplied (bio/premium/LPG)	UL, super UL, diesel	UL, diesel	Super UL, Premium UL, diesel
Forecourt shop format/brand	26 Spar, 2 Vivo	2 shops	•
Tie-ups with other major brands	11 Tim Horton's Coffee, 6 Bewleys Coffee	•	•
Major promotions/loyalty scheme	Fuel sales gift promos, Spar offers, car wash offers	•	•
Number of car washes	16 rollover, 21 jet wash	1	18
Number of sites with LPG	•	•	3
Outside payment terminals	3	2	•
Sites with alcohol licences	•	2	4
Sites with ATMs	22	2	2
Any other comments		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.	

"Gleaner is a local company for local businesses. We have more flexible contracts and try to build relationships with retailers"

David Todd, managing director, Gleaner Oils

Fuel Brand	Gleaner	Texaco/Murco/Dragon/NWF/Lincolnshire	BWOC
Company Name	Gleaner Oils	NWF Fuels	BWOC
Address	Milnfield, Elgin, Morayshire IV30 1UZ	Wardle, Nantwich, Cheshire CW5 6BP	BW Estates, Oldmixon Crescent, Weston-Super-Mare BS24 9BA
Telephone	01343 557400	01829 260900	01934 417576
Email	oilandgas@gleaner.co.uk		jason.rogers@bwoc.co.uk
Website	www.gleaner.co.uk	www.nwffuels.co.uk	www.bwoc.co.uk
Head of retail	David Todd	Andy Smith/Len Hamilton	Jason Rogers
Number of supplied sites	73	68	65
Number of branded sites	73	68	32
Number of dealers	64	68	32
Number of co-owned sites	9	•	1
Co-owned (direct managed)	9	•	1
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	NE Scotland, Highlands, West Highlands & Islands	England, Wales	UK, predominantly SW England
Fuels supplied (bio/premium/LPG)	UL, diesel, biodiesel, LPG	UL, super UL, diesel, kerosene	UL, super UL, diesel, biodiesel
Forecourt shop format/brand	1 shop	46 shops	Mace
Tie-ups with other major brands	1 Spar	Spar, Costcutter, Mace, Londis, Premier, Nisa	•
Major promotions/loyalty scheme	•	Texaco Star Rewards	•
Number of car washes	9 jet wash	30	•
Number of sites with LPG	30	2	•
Outside payment terminals	•	•	•
Sites with alcohol licences	3	42	1
Sites with ATMs	2	30	1
Any other comments	Gleaner says it offers a very good support package for smaller filling stations with more flexible contracts than the majors.	NWF Fuels says it is consistently taking on new retailers who are interested in taking on the Texaco brand with a tailor-made package to suit their requirements.	

Fuel Brand	Harvest Energy	Pace	Jet/Brobot
Company Name	Harvest Energy	Tate Fuel Oils	Brobot Petroleum & Harborough Developments
Address	2 Cavendish Square, London WIG 0PU	Leeds Road, Otley, W Yorks LS21 3BB	Thorpe Road, Melton Mowbray, Leicestershire LE13 1SH
Telephone	0207 580 0033	01943 467444	01664 480000
Email	retail@harvestenergy.co.uk	sales@tate-fuels.co.uk	sales@brobot.co.uk
Website	www.harvestenergy.co.uk	www.tateoil.co.uk	www.brobot.co.uk
Head of retail	Simon Davis	Andrew Tate	Eddie Bright
Number of supplied sites	61	50	23
Number of branded sites	37	13	23
Number of dealers	61	11	1
Number of co-owned sites	•	2	22
Co-owned (direct managed)	•	2	22
Co-owned (franchisee/com-op)	•	•	•
Areas of operation	England, Wales, Scotland	North England	East Midlands, Yorkshire
Fuels supplied (bio/premium/LPG)	UL, super UL, diesel	UL, diesel, super UL, gas oil, kerosene	All
Forecourt shop format/brand	•	•	22 Londis
Tie-ups with other major brands	•	•	4 Simply Coffee, 3 Bake 'n' Bite, 1 Boston Coffee
Major promotions/loyalty scheme	•	•	Monthly shop offers
Number of car washes	•	4 jet wash	6 rollover, 24 jet wash, 1 hand wash
Number of sites with LPG	5	•	1
Outside payment terminals	•	•	•
Sites with alcohol licences	•	•	16
Sites with ATMs	•	•	9
Any other comments	Harvest Energy says it is the largest independent motor fuels supplier and Britain's fastest growing fuel brand, offering nationwide coverage.		The company says it continues to look for growth opportunities through quality acquisitions and new builds.



"Harvest Energy is Britain's fastest growing fuel brand. Offering nationwide coverage, we're committed to continued expansion in the year ahead"

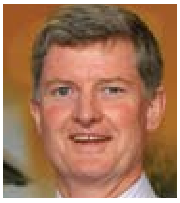
Simon Davis, head of sales & logistics, Harvest Energy

Fuel Brand	United
Company Name	United Petroleum Co
Address	Clayhill Service Station, Uckfield Road, Ringmer, Lewes BN8 5RU
Telephone	01273 814340
Email	info@unitedpetroleum.co.uk
Website	www.unitedpetroleum.co.uk
Head of retail	Anthony Salvidge
Number of supplied sites	4
Number of branded sites	2
Number of dealers	•
Number of co-owned sites	2
Co-owned (direct managed)	2
Co-owned (franchisee/com-op)	•
Areas of operation	Sussex
Fuels supplied (Bio/Premium/LPG)	UL, diesel, gas oil
Forecourt shop format/brand	Own brand c-stores
Tie-ups with other major brands	•
Major promotions/loyalty scheme	•
Number of car washes	2 jet wash
Number of sites with LPG	•
Outside payment terminals	•
Sites with alcohol licences	2
Sites with ATMs	•
Any other comments	United's sister company Pricewatch now owns and operates four former United sites, which are now dealer sites under the Murco brand.

SHARE BRAND OWNERSHIP 2011 Data supplied by Experian Catalist

SHARE BRAND	COMPANY	DEALER	HYPERMARKET	TOTAL	SHOPS	CAR WASH	LPG	ATM	ALCOHOL
ASDA	•	•	187	187	25	100	14	2	1
BP	306	863	•	1,169	1,159	750	207	881	646
CO-OPERATIVE	•	•	32	32	30	27	13	25	25
ESSO	589	310	•	899	889	383	23	606	495
FOOD STORE	•	49	14	63	62	32	6	32	15
GB OILS	•	228	•	228	99	48	12	29	26
GLEANER	9	63	•	72	49	33	21	6	21
GULF	•	212	•	212	174	78	20	47	54
HARVEST ENERGY	•	30	•	30	28	22	5	15	13
JET	•	375	•	375	368	244	40	188	147
MAXOL	31	68	•	99	96	70	8	69	17
MINOR BRAND	24	275	•	299	195	116	16	68	66
MORRISONS	•	•	295	295	291	274	61	4	2
MURCO	174	238	•	412	370	219	30	160	202
PACE	•	144	•	144	96	30	7	18	28
RIX	•	44	•	44	17	7	2	4	4
SAINSBURYS	•	•	262	262	252	193	9	33	133
SHELL	573	303	•	876	873	470	223	531	168
TESCO	•	•	476	476	453	234	6	74	29
TEXACO	•	883	•	883	843	531	79	508	401
TOTAL	492	426	•	918	866	631	70	469	365
UNBRANDED	•	790	•	790	471	182	58	92	122
UK TOTAL	2,198	5,283	1,266	8,765	7,706	4,674	930	3,861	2,980

NOTES: 1. All figures include Northern Ireland. 2. Share brand definitions are as last year. 'Food Store' includes such brands 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 2011 (based on V1 2011 release) © Experian Catalist 2011



"Aiming to continue Jet's trend of new site gains into 2011/12, we are very keen to sign up new dealers where the right opportunities exist"

Patrick Hudson, Jet marketing manager, ConocoPhillips

UK DEALER SITES 2011 – 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	863	313	542	7	1	855	68,966	80	552,204	641
ESSO	310	65	235	5	5	300	19,787	65	146,450	480
FOOD STORE	49	35	14	0	0	49	4,785	98	33,350	681
GB OILS	228	12	87	43	86	99	4,300	31	24,241	174
GLEANER	63	6	34	8	15	40	1,639	34	6,816	142
GULF	212	17	157	15	23	174	7,775	41	46,670	247
HARVEST ENERGY	30	3	25	1	1	28	1,432	49	9,730	336
JET	375	33	335	5	2	368	17,299	46	134,027	359
MAXOL	68	47	18	2	1	65	7,282	109	67,435	1,006
MINOR BRAND	257	43	113	38	63	156	8,687	45	59,583	310
MURCO	238	25	171	24	18	196	9,015	41	51,799	235
PACE	144	7	89	17	30	96	3,766	33	20,660	183
RIX	44	1	16	8	19	17	761	30	4,845	194
SHELL	303	90	211	2	0	301	22,024	73	160,165	529
TEXACO	883	217	626	21	18	843	57,365	66	421,032	487
TOPAZ	18	11	7	0	0	18	1,380	81	12,100	712
TOTAL	426	60	314	11	41	374	21,902	57	152,123	395
UNBRANDED	790	65	406	102	215	471	22,320	39	115,284	203
UK DEALER TOTAL	5,301	1,050	3,400	309	538	4450	280,485	59	2,018,514	425
	100%	20%	64%	6%	10%	84%				

UK DEALER SITES 2011 – CAR WASH Data supplied by Experian Catalist

DEALER SITES 2010	SITES	CAR WASH	JET WASH	AUTO WASH	CONVEYOR	MF PUMPS	AVERAGE MF PUMPS
BP	863	579	454	350	6	3,706	4.3
ESSO	310	214	167	105	3	1,280	4.2
FOOD STORE	49	21	20	3	0	134	2.7
GB OILS	228	48	47	5	0	597	2.6
GLEANER	63	26	26	0	0	155	2.5
GULF	212	78	76	13	0	689	3.3
HARVEST ENERGY	30	22	17	9	0	125	4.2
JET	375	244	208	112	2	1,467	3.9
MAXOL	68	46	46	10	0	227	3.3
MINOR BRAND	257	91	84	16	1	705	2.8
MURCO	238	75	69	18	0	752	3.2
PACE	144	30	27	7	1	412	2.9
RIX	44	7	7	0	0	116	2.6
SHELL	303	169	155	81	1	1,257	4.1
TEXACO	883	531	426	228	4	3,342	3.8
TOPAZ	18	8	8	1	0	61	3.6
TOTAL	426	216	175	106	1	1,549	3.7
UNBRANDED	790	182	173	24	0	2,024	2.6
UK DEALER TOTAL	5,301	2,587	2,185	1,088	19	18,598	3.5

NOTES: 1. All figures include Northern Ireland. 2. Share brand definitions are as last year. Food store includes such brands as Spar, Waitrose and other minor branded stores. 3. Shop figures include everything above kiosk level. 4. Car wash numbers includes all types – jet wash, rollover and conveyor. Catalist UK database May 2011 (based on V1 2011 release) © Experian Catalist 2011

"We continue to expand the Gulf brand. With more than 100 site conversions in the past 12 months, we are the largest supplier to independents"

Keith Jewers, director of retail, Gulf Oil

SITE NUMBERS BY BRAND 2011 Data supplied by Experian Catalist

BRAND	NUMBER OF SITES		
MAY	2009	2010	2011
3D	2	2	2
A H FUELS	1	•	•
ACORN	1	•	•
AMCO	1	1	1
ANGLIAN	1	1	1
ANGLO	11	5	5
APPLEGREEN	4	7	9
ARNDALE	1	1	•
ASDA	177	180	187
BATA	1	2	2
BATES & HUNT	4	5	5
BAXTER JOHNSTON	4	4	3
BECA	3	2	1
BFL	15	8	5
BP	1,183	1,174	1,169
BRETTS	1	•	•
BRITISH BENZOL	3	•	•
BROADLAND FUELS	4	1	1
BROBOT	1	1	1
BUTLER	37	21	18
BWOC	25	21	21
CALLOW	6	3	3
CARLTON	17	20	15
CENTRA	6	5	4
CGP	1	1	1
CLUB	8	5	4
COOKE	2	3	3
CO-OP	2	15	19
COSTCUTTER	5	6	6
CPL	•	•	2
CRANSTON FUELS	1	1	1
CYMA	1		
DAY TODAY	7	4	4
DEANS	1	1	1
DEV OIL	1	1	1
DISCOUNT FUELS	•	1	1
DMC	1	•	
DRAGON	12	10	9
EGAM	1	1	1
ELF	6	4	1
EMO	•	•	9
EP	3	2	1
ESSO	884	890	899
EURO OIL	1	1	1
EUROPA	1	1	•
EVESONS	2	1	1
EVOCO	3	1	1
EXPRESS	5	4	3
FLARE	18	13	9

BRAND	NUMBER OF SITES		
MAY	2009	2010	2011
GB	7	10	8
GLEANER	73	71	72
GLENDALE	1	1	1
GLOBE	1	1	1
GO	6	12	14
GULF	178	172	212
HARVEST ENERGY	6	9	30
HAVEN	1	1	1
HELTOR	5	5	5
HIGHLAND	17	14	12
HILLSIDE	1	1	1
HOW	2	•	•
HT	1	1	1
IMPERIAL	15	12	12
JB FUELS	1	1	1
JET	389	359	375
JET(EMO)	17	17	7
K9	1	1	1
KELTIC	5	2	2
KEYFUELS	1	1	•
KP	1	1	1
LINCOLNSHIRE FUELS	1	1	1
LOCAL	1	1	1
LONDIS	•	2	2
MACE	3	4	3
MAJOR	1	1	1
MALJEE	4	5	4
MANX	•	•	8
MARTINDALES	6	4	2
MAXOL	97	96	99
MFS	1	1	1
MILLERS FUELS	1	•	•
MINSTER	2	2	2
MITCHELL & WEBBER	1	2	2
MOCO	1	1	1
MORRISONS	289	292	295
MP	1	•	•
MURCO	351	397	411
MURPHY	1	1	•
NATIONAL	41	22	21
NISA	4	2	5
NORTHERN ENERGY	3	1	1
NWF	9	9	7
OAK	12	11	7
ONE	4	12	10
ONE STOP	•	1	•
PACE	129	135	144
PARK & SHOP	•	6	6
PEVA	1	1	1

BRAND	NUMBER OF SITES		
MAY	2009	2010	2011
PHOENIX	7	2	2
POWER	95	80	72
PRIMA	1	1	1
PRINCE	2	2	2
PROTEUS	48	30	17
QUALITY	•	•	1
Q8	2	•	•
RANGEHILL	1	1	1
RED ROSE	1	1	1
REGENCY OILS	4	6	6
REGENT	25	38	22
REPSOL	3	2	2
RIX	74	53	44
SAINSBURYS	249	255	262
SAVE	2	2	1
SCOTTISH FUELS	31	32	27
SEVERN FUELS	1	1	1
SHELL	949	925	876
SHINING STAR	2	•	•
SHOP LOCAL	•	1	1
SMILE	•	2	2
SOLO	1	4	5
SOMERFIELD	35	15	13
SOUTHERN COUNTIES	1	1	1
SPAR	16	12	13
SPOT	15	9	8
SPUR	3	2	2
STAR	•	8	16
TATE	5	5	4
TEAM SPIRIT	3	2	1
TESCO	295	270	284
TESCO EXPRESS	17	18	19
TESCO EXTRA	130	163	173
TEXACO	1,049	992	861
THAMES	48	44	40
THRUST	8	6	6
TOP	2	6	6
TOPAZ	•	16	18
TOTAL	825	813	823
UK	146	111	107
UNBRANDED	832	748	734
UNITED	10	9	6
VIVO	9	9	8
WAITROSE	14	14	14
WATSON	1	1	1
WCF	43	34	32
XL STOP & SHOP	3	6	6
TOTAL	9,176	8,884	8,765