

News Release

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Diesel sales boom whilst forecourt closures slow down in 2007

The latest *UK Retail Marketing Survey*, conducted by the Energy Institute (EI), shows that the number of forecourt sites declined by 111 in 2007, compared to 382 in 2006 and 587 in 2005. Simultaneously, petrol sales in 2007 were 17.29% below decade earlier levels whilst diesel sales in 2007 rose strongly, reaching 21.015mn tonnes with a gain of 869,000 tonnes on the year. This level is 38.77% higher than a decade ago, illustrating how strong the move to diesel has become.

The *UK Retail Marketing Survey*, published with the EI's April issue of *Petroleum Review*, provides a comprehensive, statistical overview of the UK forecourt market. Data is broken down by company, region and forecourt facilities. The survey is based on statistics relating to end-2007 and does not reflect changes since that date. The figures are cross-checked with numbers from market analyst Experian Catalist.

Key findings of the survey show:

- There were 9,721 operational filling stations in the UK and Northern Ireland at end-December 2007.
- Petrol sales totaled 18.072mn tonnes by year-end - a decline of 72,000 tonnes on year earlier levels.
- 2007 total road fuel sales rose by 2.08%, to 39.087mn tonnes.
- Registered UK vehicles reached an all time high in 2007 of 33.4mn, with each forecourt supplying an average of 3,603 vehicles.
- Different sectors showed very different responses in 2007:
 - oil company sites *declined* by 239 to 5,549
 - main retailer sites *increased* by 4 to 1,240
 - supermarket sites *increased* by 46 to 1,237
 - smaller retailer sites *decreased* by 16 to 107
 - other unbranded sites *increased* by 94 to 1,138
- There were 759 quick-serve restaurants attached to forecourts (Little Chef, McDonalds etc), and 651 in-forecourt (Wild Bean Café, Bake N Bite etc).
- Average site throughput, at 4,251,193mn litres/year, was a new record level.
- 782 sites now retail auto-LPG; the largest operators are BP with 209, virtually unchanged on 2005 (207), and Shell with 158, up 2 from 2006.
- 949 sites were retailing biodiesel (up 451 from 2006), with 578 retailing bioethanol (up 181).
- 2,849 sites retailed super unleaded petrol, 376 more than in 2006.
- The five largest oil company operations by number of branded forecourts were (2006 figures in brackets):
 - BP – 1,146 (1,212) down 66
 - Texaco – 1,018 (1,041) down 23
 - Esso – 880 (910) down 30
 - Shell – 880 (872) up 8
 - Total – 855 (909) down 54
- Taxation of retail motor fuels was running at 50.35 pence/litre on both petrol and diesel at end-2007, VAT remained unchanged at 17.5%.

The 2008 UK Retail Marketing Survey is available, priced £60, from the Energy Institute.

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Notes to editor: With a combined membership of over 13,500 individuals and 300 companies across 100 countries, the Energy Institute (EI) is the leading chartered professional membership body for those working in energy. Providing an independent focal point and a powerful voice to engage business and industry, government, academia and the public, the EI promotes the safe, environmentally responsible and efficient supply and use of energy in all its forms and applications. In fulfilling this purpose the EI addresses the depth and breadth of energy and the energy system, from upstream and downstream hydrocarbons and other primary fuels and renewables, to power generation, transmission and distribution to sustainable development, demand side management and energy efficiency. Offering learning and networking opportunities to support career development, the EI provides a home to all those working in energy, and a scientific and technical reservoir of knowledge for industry. For further information, please visit www.energyinst.org