

## News Release

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### Forecourt sector showing signs of stabilising?

The latest *Retail Marketing Survey*, conducted by the Energy Institute (EI), shows that by end-2008 the UK fuel retail market had turned a corner, with the number of forecourts in the UK actually increasing from 9,271 sites in 2007 to 9,283 in 2008 – the first rise in numbers since 1997. However, the increase was a mere 0.13% on the previous year and the question remains as to whether this is just a small blip in the statistics or a sign that the sector has now bottomed out and stabilised.

The *Retail Marketing Survey*, published with the EI's March 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-2008 and does not reflect changes since that date. The figures are cross-checked with numbers from market analyst Experian Catalyst.

Key findings of the survey show:

- There were 9,283 operational filling stations in the UK and Northern Ireland at end-December 2008.
- Petrol sales totaled 18.455mn tonnes by year-end – a rise of just 22,000 tonnes on year earlier levels.
- Diesel sales totaled 20.905mn tonnes by year-end – falling by 132,000 tonnes on year earlier levels.
- Total 2008 road fuel sales fell from 39.470mn tonnes to 39.360mn tonnes.
- By the close of 2008, unleaded prices had averaged 107.46 p/l (versus 95.40 p/l in 2007); while diesel prices closed the year at an average price of 118.22 p/l (versus 97.88 p/l)
- Registered UK vehicles reached an all time high in 2008 of 33.957mn, with each forecourt supplying an average of 3,658 vehicles.
- Site number breakdown by sector in 2008:
  - oil company sites *increased* by 97 to 5,646
  - main retailer sites *increased* by 42 to 1,173
  - supermarket sites *increased* by 22 to 1,259
  - smaller retailer sites *increased* by 23 to 128
  - other unbranded sites *decreased* by 61 to 1,077
- There were 764 quick-serve restaurants attached to forecourts (Little Chef, McDonalds etc), and 714 in-forecourt (Wild Bean Café, Bake N Bite etc).
- Average site throughput, at 4,403,940mn l/y, was a new record level.
- 806 sites now retail auto-LPG; the largest operators are Shell with 227 and BP with 209.
- The five largest oil company operations by number of branded forecourts were (2007 figures in brackets):
  - BP – 1,200 (1,146) up 54
  - Texaco – 1,061 (1,018) up 43
  - Shell – 932 (880) up 52
  - Esso – 872 (880) down 8
  - Total – 835 (855) down 20

**The 2009 Retail Marketing Survey is available, priced £60, from the Energy Institute.**

**To order your copy, please contact: Chris Baker, t: +44 (0)20 7467 7114; e: [cbaker@energyinst.org](mailto:cbaker@energyinst.org)**

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**For further queries, please contact: Katie Crabb, PR Manager, t: +44 (0)20 7467 7173, e: [kcrabb@energyinst.org](mailto:kcrabb@energyinst.org)**

**Notes to editor:** With a combined membership of over 14,000 individuals and 300 companies across 100 countries, the Energy Institute (EI) is the leading chartered professional membership body for those studying and working in energy. Providing 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 network to all those working in energy, and a scientific and technical reservoir of knowledge for industry. For further information, please visit [www.energyinst.org](http://www.energyinst.org)