Market Review 2016
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Green lights all the way
The PRA Market Review 2016 is the fourth such annual publication from the Petrol Retailers Association and, yet again, both the content and sponsorship continue to improve. Last year we pledged to invest more money into providing a user-friendly and informative website with FAQs (frequently asked questions), which we started during the second half of the year. User numbers have been climbing steadily but, most importantly, we have had very positive feedback from members. The website now has a dedicated members’ section where you can access information which is not available to the public. As internet usage increases, we have taken steps to invest further into system improvements for 2016.

The fortnightly e-newsletter Petrol Heads Up has been an unqualified success and is now eagerly awaited by retailers, third-party media plus suppliers to our dynamic industry. Some recipients even take photocopies to pass round to colleagues and others file copies for easy reference.

While there has been good support for many of our events, the new format Live & Local forums have still failed to capture as much interest as we had hoped. The concept is that PRA comes to you by arranging venues in key locations around all four home countries. Invitations are mailed to all independent filling stations within a 50-mile radius and many are followed up by telephone. This is an opportunity for members and non-members to meet the PRA team, network with fellow retailers and hear about new products that could boost their bottom lines. Do come and join us in 2016.

It was very gratifying to have unanimous support from the National Committee for my seventh year as PRA Chairman and for a second three-year term to June 2018 as a main Board Director of the Retail Motor Industry Federation Limited. This is an honour and a challenge. Once again a huge thanks to all our sponsors that have enabled PRA to provide retailers with publications, Live & Local forums, Roadshows (with Thames Communications) and other events including the RMI Dinner.

Who’s who at the PRA

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Andrew Lawrence, Lawrence Garages (London) Ltd
Ben Lawrence, Lawrence Garages (London) Ltd
John Oliver, Central Convenience Stores

The PRA has been part of the Retail Motor Industry Federation (RMI) for more than 100 years. RMI is a leading automotive trade body in the UK, representing car and commercial vehicle dealers; independent garages; bodyshops; motorcycle dealers; petrol retailers; auction houses and cherished number plate dealers; who provide sales and services to motorists and businesses across the UK.

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PRA Chairman Brian Madderson reviews an extraordinary year for petrol retailers

In my forward to the Market Review 2015, I set out five reasons why there was “history in the making” for independent retailers:

- Further retreat of oil companies from frontline retailing;
- Growth of supermarket out-of-town megastores stalls;
- Collapse of global crude oil prices;
- UK economic growth recommences;
- New car market surges to a record 34m vehicles on the road.

Not only have all these five milestones been realised, but the petrol retailing industry has proved even more dynamic with further key changes that were not fully anticipated this time last year.

There are now just three oil majors with company-owned and operated sites (COS) in the UK, which are both standalone and motorway service area (MSA): Shell with 570 including Waitrose outlets; BP with 312 (including 230 M&S Simply Food stores); and Esso with 200, which are primarily Tesco Express forecourts. This total of 1,082 is the lowest for very many years and could have been even less had Shell not decided to retain around 65 of their Tier 3 sites which had been in the parcel of 250 sites originally offered to the independent market.

The big four supermarkets have an average fuel throughput of more than 10mlpa compared to an independent at less than 2mlpa. Thus every new supermarket outlet would suck up the entire annual volume of at least five or six local, family-owned forecourt businesses.

With over 600 small, often rural, “white pole” (unbranded) forecourts in the UK and around 800 minor brands, it is likely that the present net closure trend of 150 to 200 sites/year will continue. This suggests that up to a further 2,000 forecourts could be lost to the roads network over the next 10 years leaving a residual number of around 6,500 to 7,000 sites.

From 2000 to 2025, the number of UK forecourts could have halved – increasing the number of rural fuel deserts, increasing the number of “fuel run outs”, increasing the time and distance from refuelling facilities for many elderly and infirm drivers, and significantly increasing the problem of energy resilience. The Government recognises issues with other forms of energy including electricity and gas but if the motive power revolution with hydrogen and/or battery vehicles takes 20 years plus to develop then the UK is at severe risk from road fuel supply disruption. This could be geo-political with such a high volume of imports (eg diesel at 40% and rising) concentrated on a few Russian suppliers, it could be related to sea transport issues of vessel availability or bad weather and it could be lack of inland storage or industrial disputes.

As we look at overall market changes, over 4,000 (60%) independent forecourts have ceased trading in just 15 years since 2001, largely rendered financially unsustainable by the 40% increase in supermarket filling stations and increase in low margin fuel card volumes over the same period.

Fortunately for the independent sector, the disposal of larger volume sites by the oil cos has boosted site numbers from a net 3,000 to nearly 6,000 by the end of 2015. However, it seems that the disposal phase has reached a settlement point and we may not see such disposal activity by the majors for some time to come.

The big four supermarkets have experienced a really difficult trading...
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period with the German discounters, Aldi and Lidl, doubling their market share to over 10% in just the last three years. With deflation in the grocery sector, only Waitrose and M&S appear to have shown any sales growth with Tesco, Morrison and Asda all in the negative spectrum at some time.

Analysts are expecting further inroads by the discounters as they ramp up store opening plans for 2016 and beyond. Aldi and Lidl are looking at 171 stores compared to less than 30 for the big four put together. Convenience stores with 4% CAGR and online shopping with annual growth up to 20% are both impacting negatively on the big stores even if much is self-inflicted. This is before Amazon, with 4,000 grocery lines via its ‘Pantry’ offer for London and the South East, really gets into gear with a national ‘Amazon Fresh’ offer.

The UK economy has rallied and with it road fuel demand has improved with 1H/15 showing a year-on-year increase of 1.1% but petrol continues its downward trend at -2.7% whereas diesel, despite the renewed health concerns and emissions scandal, rose by 3.2%.

**LOW PRICE, LOW INFLATION**

Booker (Londis, Premier, Budgens and Family Shopper) with others such as Nisa and Bestway developing fast. Many independents are benefiting from the rise and rise of coffee demand, which forms part of the 5.5% CAGR in the food-to-go category with brands such as Starbucks, Costa Coffee and a range of self-service brands including Tchibo.
has brought about extraordinary and innovative market changes:

➤ Puma Energy, the Singapore-based subsidiary of Trafigura Group purchased the distribution and storage assets of Murco Petroleum Limited (UK subsidiary of Murphy Oil Company) in March 2015. This involved facilities at the former Milford Haven refinery and inland terminals at Theale, Bedworth and Westerleigh adding 1.4Mm³ of storage capacity to their mid-stream operations worldwide. Puma has over 2,250 branded forecourts in overseas markets including Australia, so will we see this brand being introduced onto UK forecourts any time soon?

➤ State Oil, the UK headquartered and Swiss-based owner of Prax Petroleum, purchased Harvest Energy in June 2015 including dealer supply activity with the aim of providing 15% of total UK road fuel volumes. Will we see further unmanned Harvest Energy branded forecourts being developed and will the brand receive greater marketing investment?

➤ Essar (UK), the UK subsidiary of Essar India, unveiled its first branded forecourt in November 2015 at the Coalville, Leicestershire site owned and operated by HKS Group sporting these new red and white colours. Are there more dealers in the pipeline and/or will Essar look to enter the market directly by purchasing one of the larger groups?

➤ In July 2015, the UK arm of US private equity firm Clayton Dublier & Rice, in partnership with management, purchased the 373-site petrol retailing and distribution business of Motor Fuel Group from Patron Capital for approximately £300m.

➤ TDR Capital, the London-based private equity firm, announced in October 2015 that it had acquired a substantial minority share in the fast growing 340-site Euro Garages for an amount valuing the business at approximately £1.2bn. In 2014 TDR acquired the petrol retailing interests of Delek with over 1,100 sites in Benelux and France, which had been renamed European Forecourt Retail (EFR) Group.

➤ Topaz Energy Group, Ireland’s largest convenience and fuel retailer, announced in December 2015 that it is being taken over by the Canadian convenience and fuel retailing giant Alimentation Couche-Tard, in a deal believed to worth about £325m.

➤ Rumours abound about a major acquisition by another London based private equity firm… so watch this space.

➤ Ambitious mid-size HK Group announced the acquisition of privately owned forecourt operator Brobot Petroleum in November 2015, taking the Leicester based HKS to nearly 60 sites following the purchase of some of Shell’s retail assets.

Meanwhile, the refreshed All-Party Parliamentary Group (APPG) – Fair Fuel has invited many players in the petrol retailing industry to a public enquiry at Westminster.

This Group does not have the status of a Select Committee so it will be interesting to see which organisations voluntarily attend. PRA will certainly be represented. What impact could this political interest and attention have on the market in 2016?

FairFuel UK is exclusively a lobbying entity funded by the Road Haulage Association (RHA), Freight Transport Association (FTA), Association of Pallet Networks (APN) and Microlise. The RAC has recently withdrawn support.

Quentin Willson is the ‘celebrity’ voice of Fair Fuel UK and its unabashed aim is to reduce pump prices by lowering fuel duty and improving wholesale price transparency.

PRA will firmly resist any calls for price controls on road fuel unless such a system is simple, fair and transparent to all forecourt retailers.

Looking ahead, the new Conservative Government is causing some disquiet in the retail sector by recent proposals including:

➤ Introduction of the ‘Living Wage’;
➤ Large company funding of apprenticeship schemes;
➤ Devolving business rates to local authorities so scrapping UBR.

All these well-intentioned schemes are likely to drive costs up and hold back or even reduce employment levels. Retailers are advised to carefully plan for such changes.

However, the overall outlook for the majority of well-funded, established and innovative independents is now more positive than for many years.
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We are now about halfway through the transition from the old petroleum licensing regime into the registration of the ‘keeper’ and certification of the storage premises introduced by the new regulations.

By the end of September 2017, all petrol filling stations (PFS) must be transferred into the new legislative arrangements by their Petroleum Enforcing Authority, and have a Petroleum Storage Certificate.

Members are reminded that they need to have all tanks/tank compartments that they believe may be used to store petrol included on the Petroleum Storage Certificates for their sites, even if they are currently being used to store another fuel. Also they need to be aware that the need to notify the Authorities of works or changes at their premises is now limited to those listed on the Petroleum Storage Certificates under ‘Prescribed Material Changes’.

**TRAINING**

For many years, the PRA has been able to supply paper-based comprehensive training programmes for forecourt staff. We are now working with the Safety Passport Alliance to provide similar training programmes via e-learning, whereby candidates will be able to receive theoretical training and be assessed by computer software systems. This will be available this year.

**ETHANOL IN PETROL**

The Government is committed to introducing E10 petrol (10% ethanol content instead of the current level of 5%) to the UK to comply with the European Renewable Energy Directive. The technical officers are participating in the production of the guidance being produced by the Low Carbon Vehicle Partnership to ensure that the impact on our members is minimised. It is unlikely that the introduction of E10 will occur until at least 2017.

We will ensure that members are kept informed and that the guidance is made available as soon as it has been finalised.

**HYDROGEN VEHICLES**

Another Government initiative aimed at future sustainability of the UK’s energy supplies is the introduction of hydrogen as a fuel for vehicles. The production, vehicle and refuelling technology exists, but the provision of the countrywide refuelling infrastructure in an economically viable manner is a challenge. Obviously hydrogen vehicles are not going to be widely accepted if recharging facilities are not available to enable the vehicles to travel around the UK.

The aim is to have hydrogen sold alongside other vehicle fuels on petrol forecourts, ideally with hydrogen dispensers on the same islands as petrol/diesel dispensers. However, because hydrogen has completely different properties to any of the vehicle fuels currently available, there is no guidance available on how fuels with such different properties can be stored and dispensed directly alongside each other.

The PRA is represented on the Hydrogen Working Group hosted by the Energy Institute tasked with producing the guidance that will set the standards of equipment, hazardous zones and safety distances that will enable the combining of the hydrogen with other fuels on petrol forecourts.

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As the fuels that power vehicles change, so do the technical issues surrounding them.
When considering who I wanted to be the shop partner for my development, I felt the breadth of the Budgens fresh food offer, overall range, logistics service, marketing approach and brand image would be right for me.

From the day we opened my fuel sales have grown by over 30% and my shop sales have already doubled and there is much more to come!

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Mohammed Farooq
Owner of Budgens Stadhampton

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ELECTRIC VEHICLES
The number of electric or hybrid vehicles on our roads is increasing, as is the distance that can be travelled between recharging. We are seeing an increasing number of fast charging points located in the car parks of supermarkets and motorway services. Some PFS operators have recognised that if they have sufficient space on their site, the occupants of a vehicle that is being charged are available to buy goods and services from their shops for the 20 minutes that their vehicle is on charge. We are liaising with the companies that install the fast charging points.

ELECTRONIC PAYMENT
One of our members was at the forefront of the payment for fuel using an app on a mobile phone; a very similar system has now been widely introduced by a major oil company. This method overcomes the conflict of the non-use of mobile phones on petrol forecourts by requiring that the phone remains within a vehicle during the electronic transaction and must not be in use while the customer is dispensing fuel.

However, other means of electronic payments such as contactless – where the electronic chips that are currently embedded in debit and credit cards are within a mobile phone or other electronic device – are in use for the payment for fuel in other countries around the globe. The manufacturers of fuel dispensers and equipment suppliers for electronic payments are now pushing to supply these systems to the UK.

Despite the early unfounded belief that a mobile phone would be a source of ignition for petrol vapour on a petrol forecourt, the risk associated with using a mobile phone or other electronic device while fuelling a vehicle is that of distraction.

The possible outcomes being; spillage of fuel on clothing or on the ground leading to the health, slip and fire risks associated with this, plus that of misfuelling, or dispensing more fuel than intended and possibly not having the means to pay.

The UK’s health and safety legislation requires the employer ie responsible person/site operator to take all necessary steps to ensure the health and safety of both their employees and other persons that may be affected – in the case of petrol filling stations this includes customers, contractors etc. Therefore they must not implement something that could cause harm, or they must introduce suitable and sufficient control measures that mitigate the risks. This is not the same in all countries, in some the health and safety is the responsibility of each individual.

We therefore have the challenge of moving with the inevitable increased use of mobile technology while controlling any risks posed by the use of the technology.

The technical officers sit on a number of forums that are seeking to address the issue of trying to accept the use of mobile devices on petrol forecourts for payment purposes, without the phones being a distraction.

REFILLING LPG CYLINDERS
The guidance to petrol forecourt operators with Autogas facilities is that they should not allow their customers to refill LPG cylinders. We currently advise our members to continue to adhere to this advice.

We have however, within the last few months of 2015, become aware of a new type of cylinder with enhanced safety features that may enable the revision of the guidance to the effect that cylinders with these features may be refilled by customers using Autogas dispensers.

Because we appreciate that this has the potential of being of great commercial interest to the members that already have Autogas facilities and to those that may consider installing a facility if there is a new market for the filling of this type of cylinder, the technical officers are tabling the changes to the guidance at the Petroleum Enforcement Liaison Group early this year.

MISFUELLING REMEDIATION
The risks associated with the remedial works required to remove fuel from a vehicle that has been misfuelled are among the highest that can occur, as it is known that there will be exposure of petrol vapour. Where the process is to be carried out on a PFS, it is the legal responsibility of both the site operator and the employer of the technician carrying out the work to ensure that there are suitable and sufficient control measures in place.

Members of the misfuelling remediation industry are now working with the training provider Safety Passport Alliance to produce a training programme for their personnel.

The aim of which is to ensure that anyone that holds the qualification will be aware of the standards of equipment that must be used, the legal and safe method of transportation of the contaminated hazardous product and the correct manner by which the hazardous waste may be disposed of and treated.

The advantage of this scheme to members will be that they will be able to easily identify companies and their staff that have participated in the training, and therefore demonstrated that they know the risks associated with both working on a petrol forecourt and carrying out the misfuelled remediation processes.

In parallel, a trial with the RAC’s misfuelling service is being undertaken by some PRA members.

The technical officers will inform members on the progress of these initiatives.
Six Tips from RMI Utilities how to Manage and Reduce Your Energy Costs

"I would just like you to know how impressed we are at the friendly and efficient manner with which you deal with our utilities negotiations on our behalf. Not only searching out the best prices for us, but organising me into writing the appropriate termination letters and signing new contracts on time. We will certainly be looking at the other benefits offered in the RMI catalogue."

Keith Morland - Group Financial Controller, Mantles Group Ltd

"We have used RMI Utilities since 2010 to handle our energy contracts and to arrange supply deals for all our premises. The service has been extremely useful during a period when we have acquired many new sites. In addition to offering competitive prices, Spiral’s all round service advises us on procedures, and manages the contracts through to implementation with new and existing suppliers. Through them we have complied with our ESOS obligations, on time, and are now setting up detailed Energy Reports to help drive down usage levels."

Peter O’Connor - Petrogas Group UK Limited

Energy costs continue to be a significant overhead for all businesses so here are six ways to potentially reduce your bills, brought to you by RMI Utilities.

1. Know your contracts
   It is estimated that 98% of UK businesses do not know the renewal date for their energy contracts. If you are one of these businesses you must contact your supplier to find out the renewal date for each supply you have and the termination clauses that your supply enforces. Without this information you may find that you are unable to move to an alternative supplier, or worse that you are rolled into high “out of contract” rates.
   NB Every supplier has different termination requirements so do not assume they are all the same!

2. Understand Your Supply
   The profile of your supplies can differ due to a number of factors, and some significant changes are happening within the industry this year. You need to be aware as to whether your supply profile is caught by the new Ofgem P271 directive, and if so how this will change the way you need to renew your electricity contracts. You also need to know whether your business is caught by the ESOS Energy Savings Opportunity Scheme, a new EU directive, and take the appropriate action as necessary as large fines can arise for failure to comply.

3. Manage and reduce your energy consumption
   Using less energy is by far the best way of reducing your costs. Suppliers are gradually rolling out new Smart meters to businesses which enable automated meter readings to be sent to that supplier. Rather than wait for this roll out, you can get a Smart meter installed through RMI Utilities who can then provide you with detailed Energy Usage Reports. This is the first step towards tracking exactly how and where you use your energy, and the information is invaluable in driving out unnecessary energy waste from your business.

4. Create an energy saving culture
   Surprisingly good savings can be gained from staff behavioural change as not everyone will be as highly tuned to saving money as you are. A culture should be created where staff become more aware of the consequences of not managing your lights and other equipment appropriately. RMI Utilities can provide staff training, information on reducing energy consumption, advice on energy saving techniques and products, and generally help you to build the energy saving culture in your business.

5. Reduce Your administration
   For every site you have you will most probably have at least two energy supplies, if not more. For each supply your contract dates may differ, as may your supplier and their requirements at renewal. If you own multiple sites the administration of your energy contracts can become a major staff time issue. RMI Utilities can manage the alignment of your supplies for you ensuring a reduced administrative burden for your staff, and the ability to budget with more control.

6. Don’t ignore the resources at your fingertips!
   RMI Utilities was created to help RMI members to manage their energy supplies; avoid missed renewals; review the whole market for the right deal; advise on Smart metering and management reporting; provide energy efficiency tips; and drastically reduce the administration burden on staff.
   If you feel that we can help you to achieve peace of mind in an area that constantly frustrates and annoys you and your staff, please contact us and we will be happy to help.
What the Technical Officers do, and how can they help members

The Technical Officers represent the members on a wide range of national forums. To keep up to date with developments in technology used on petrol filling stations, and to influence the makers of legislation and guidance on compliance, that has a direct impact on members. They participate in the forums and committees hosted by the organisations shown in the table below that have an impact on the construction and operation of petrol filling stations:

<table>
<thead>
<tr>
<th>ORGANISATION</th>
<th>IMPACT ON PFS OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and Safety Executive</td>
<td>Influencing and shaping legislation and Codes of Practice</td>
</tr>
<tr>
<td>Environment Agency</td>
<td>Ensuring that legislation and guidance is proportional to the risks posed at petrol filling stations.</td>
</tr>
<tr>
<td>DEFRA</td>
<td>Influencing legislation on environmental controls including vapour recovery, such as moderating the requirement for the retrofitting of Stage II when minor works are carried out.</td>
</tr>
<tr>
<td>Downstream Oil Distribution Forum</td>
<td>Implementation of the Tanker Drivers Safety Passport to address issues that threatened to lead to strike action.</td>
</tr>
<tr>
<td>British Standards Institute</td>
<td>Ensuring that standards for equipment used in fuel installations are safe but not excessive</td>
</tr>
<tr>
<td>Energy Institute</td>
<td>Drafting and publishing, ‘Design, construction, modification, maintenance, and decommissioning of filling stations’ (known as the Blue Book), and other technical guidance.</td>
</tr>
<tr>
<td>Association of Petroleum and Explosives Administration</td>
<td>Meetings and forums combining ‘Industry’ and Local Authority inspectors</td>
</tr>
<tr>
<td>Petroleum Enforcement Liaison Group</td>
<td>Draft and publish Petrol Filling Stations Guidance On Managing The Risks Of Fire &amp; Explosion (the Red Guide) and other operational guidance</td>
</tr>
<tr>
<td>Various regional enforcers liaison meetings</td>
<td>Building relationships with enforcers, and dealing with local issues</td>
</tr>
</tbody>
</table>

The knowledge and experience held by the Technical Officers together with their widespread range of contacts in all areas of the industry enables them to act as intermediaries and usually resolve issues to the satisfaction of all parties. Therefore, if you have a need for help and advice on either a technical matter, or an issue of compliance – please make them your first point of reference.

Examples of when they can help are:

COMPLIANCE: If you believe that an Inspecting Officer (Petroleum, Trading Standards, Environmental Health/Pollution Control or Environment Agency) is being unreasonable, either as a result of an inspection, or if you are seeking approval for works at your site.

PROBLEM SOLVING: If you have had an incident or complaint that you aren’t sure how to deal with.

MEDIATION: If you aren’t confident that you can resolve an issue with an enforcing authority talk to us first. We can either advise you, or speak to them on your behalf.

CONCILIATION: If you have a dispute with your fuel supplier or involving any other supplier related to the keeping and dispensing of fuel, we will be able to work with both parties to achieve a satisfactory outcome.

STAFF TRAINING:

The PRA has two programmes:

► Keep it Safe and Legal, a comprehensive programme for training new employees.
► Safe Unloading of Tankers

and is currently working on enhancements to these. However, we are able to help with any issues you have with staff training.

Please remember they are here to help our members. So if you need advice on matters relating to technical or compliance issues contact either:-

RAY BLAKE
Technical Manager
Email: ray.blake@RMIF.co.uk
Telephone: 07496 967269

or

PHIL MONGER
Technical Director
Email: phil.psac@gmail.com
Telephone: 07831 327990
Gunnebo's Intelligent cash management solutions for forecourt retail are tailor made through a consultancy led approach, saving you time, money and effort whilst making the process more secure, giving you greater control of your cash.
A REAL PETROL HEAD

Need some technical advice? Then Ray Blake’s your man

Technical manager Ray Blake has years of experience

There’s not much the PRA’s new technical manager, Ray Blake, doesn’t know about petrol—whether that’s storing it or using it. That’s because, for most of his working life, Ray has been involved with petrol safety and, in his spare time, you’ll often find him tinkering with or driving classic cars.

“I’m really keen to help PRA members because I know the industry so well”

Ray began his association with petrol filling stations (PFS) when he became a trainee petroleum inspector at the Greater London Council back in 1980. He quickly qualified and spent years dealing with premises that store petroleum spirit or mixtures—from the obvious petrol forecourts to the less obvious car spray shops and even furniture factories. Fast forward some 26 years, and Ray was appointed head of the Petroleum Group of the London Fire Brigade (LFB).

Over the years he approved (and in a few cases rejected) the arrangements for the development of many hundreds of PFS—some of which are recognised as incorporating some of the most complex control measures adopted anywhere in the world. There were cases in central London, for example, where PFS were under buildings and above Underground railway tunnels.

And Ray has some fascinating stories to tell. One of the most dangerous incidents he recalls was when the rear axles of a petrol tanker broke away from the trailer unit on a steep hill outside a block of flats in a busy London borough, with 40,000 litres on board. Luckily Ray’s quick thinking saved the day. Someone had suggested pumping out the fuel into another tanker but Ray was mindful of the high risks associated with the highly flammable vapour. So instead, the axles were strapped to the trailer with hawser and the tanker driven—with a police and fire brigade escort at a snail’s pace—the wrong way around a closed major one-way system to a location in the street. There the fuel was delivered safely into the tanks of a nearby forecourt using a number of delivery hoses connected together across the pavement and into the site. It was a painstaking process that took six hours but it was a safe solution.

A PFS has become a risk-based regime rather than a prescriptive one,” he explains, “so no longer is it a case of being told what you must do, it’s a case of recording how you are dealing with things; so site operators can choose how they handle it. The authorities can challenge you and serve improvement notices if they are not satisfied.”

Ray is keen to help members with the transition and with any other compliance or technical matters. He’s already offered his services through PHU (Petrol Heads Up) and had a good response. “I’ve been asked about requirements under the legislation and what constitutes best practice,” he says. “I’m really keen to help because I know the industry. Unfortunately, because of cutbacks in the public sector, there are different levels of expertise across the Petroleum Enforcing Authorities across the country so PFS operators might not always be treated correctly.”

Ray has seen many things change for the better over the years: “At the beginning of my career, we had incidents where petrol from an old installation had leaked into the ground almost every week. But, by the time I left, we maybe had one a year,” he says.

However, one of the things that still amazes Ray is that the public don’t seem to realise where petrol comes from. He explains: “I’ve seen cases where a petrol pump on a forecourt has been lifted onto, say a pallet, to be removed and people have driven up to that pump and tried to fill up their car from it. It’s amazing what you see.”

His example, though amusing, goes to show how people—both PFS operators and their customers—are busy, sometimes so busy that things can get overlooked. But Ray is on hand to help: “Mismanagement of fuel can be dangerous and can result in injury or deaths. That’s very rare but it can happen.” And when he tells you that petrol stores 10 times the energy of TNT, you sit up and listen.

Contact Ray for help or advice: ray.blake@rmif.co.uk
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Forecourt & In-Shop Promotions Specialists
Chris Judge, Vice President Crude and Products at Argus Media, reports on how cheaper crude has boosted demand for transport fuels.

The downturn in oil prices since late 2014 shifted oil product market dynamics in 2015, with the scale of gasoline demand growth taking many by surprise. Weaker retail prices tempted consumers, but higher diesel demand was more than matched by increasing supply.

There may still be scope for further weakness in the UK oil sector after bulk diesel prices on international markets in Rotterdam hit an 11-year low in early December. Typically, diesel prices climb in the winter relative to other oil products as heating demand for gasoil kicks in, but unseasonably mild weather has limited demand for heating kerosene, leaving refiners able to concentrate on diesel production.

New refining capacity in Asia and the former Soviet Union has bolstered global diesel supply, and newspaper reports that the UK might be prone to diesel shortages appear wide of the mark. In fact, the market is suffering from oversupply in Europe even though local refineries are set up to concentrate on gasoline production.

The European refining industry received a much-needed shot in the arm from cheaper crude oil prices coinciding with increased gasoline demand on both sides of the Atlantic. The lower fuel tax environment in the US meant that falls in crude oil were faithfully passed on to consumers there and peak summer demand jumped by five per cent year-on-year, boosting export opportunities from Europe.

The simmering debate about whether European domestic consumers should consider shifting away from diesel-aspirated cars to gasoline ones acquired fresh focus from the Volkswagen emissions scandal.

The German manufacturer, which owns a quarter of the European car market, was caught red-handed cheating on emission tests for its diesel cars. Consumer groups had already been advocating a switch to gasoline driven cars for domestic users, and the scandal could accelerate the process. But an RAC study in early December suggested that motorists are far more concerned about the cost of fuel rather than its environmental impact and resale values for VW cars look likely to be little affected by the scandal.

Diesel demand in the top five European consuming nations rose by 3.5% year-on-year in the period January-August to 3.6mn b/d. European middle distillates output in October – the latest month for which data is available – stood at 5.8mn b/d, 275,000 b/d higher than a year before. UK production of motor fuels increased in line with the rest of Europe, according to DECC data.

Forecasting oil prices has always proved hazardous and financial houses, government bodies, pundits and indeed major oil companies all have a poor track record in the field. But seldom has there been more unanimity that the current low price environment is here to stay, for the short term at least. Opec’s policy of shaking out high-cost production such as shale and oil sands in favour of its own low-cost production continues apace and was confirmed at its early December meeting. But it will take some spectacular demand growth to use up the 1.4bn bl surplus on the global market, never mind reverse it.
Argus downstream

Argus provides UK companies with direct access to wholesale fuels market information. This enables our clients to respond quickly to price developments and compete more effectively. You can access Argus data and insight through the web, PDF reports, direct data feeds or your mobile device.

To find out more, email info@argusmedia.com
In October 2014 the petrol licensing regime was replaced with a certification scheme. Members should familiarise themselves with the new regime if they haven’t already done so. A guide to these regulations is available in the members’ section of the PRA website (www.ukpra.co.uk).

Licences will all have been phased out by 30 September 2017. And now, as licences come up for renewal, the site operator, now known as the ‘keeper’ can choose to pay the fee for any annual period up to 10 years at the rate that’s current at the time. Once a certificate has been issued, there is no link whatsoever between the validity of the certificate and the collection of the fee; the Petroleum Enforcing Authority must request the fee when the period paid for is due to expire. The certificate remains valid indefinitely, and a new certificate only needs to be issued if there have been ‘prescribed material changes’, these are defined on the certificate, and the PEA has to be notified a minimum of 28 days before any changes are carried out.

E-CIGARETTES

E-cigarettes are not included in the 2007 ban on smoking in enclosed spaces. Under the Health Act 2006 ‘smoking’ referred to lit tobacco. As e-cigarettes were not ‘lit’ and did not contain tobacco they were not classed as cigarettes. With the development of ‘flavoured’ liquids the government has become increasingly concerned with the potential for them to be sold to under aged users. As a result, under the Children and Families Act 2014 from 1 October 2015 ‘nicotine inhaling products’ were brought in line with other tobacco products. It should be noted that ‘nicotine inhaling products’ include the inhaling device, nicotine cartridge or nicotine refill substance.

There are exemptions. It is now illegal for retailers to sell electronic cigarettes (e-cigarettes) or e-liquids to anyone under 18. The penalty for breach is a £50 fixed penalty notice or a maximum £2,500 fine. Where there are repeated breaches, the court can also impose a Restricted Sales Order or a Restricted Premises Order prohibiting a named individual, or named premises, from selling nicotine inhaling products or tobacco to anyone for a period of up to one year.

Members are reminded that e-cigs should also be prohibited in the dispensing area of the forecourt.

CONSUMER DISPUTES

The Alternative Dispute Resolution (ADR) for Consumer Disputes (Competent Authorities and Information) Regulations 2015 became operational on 1 October 2015.

These regulations apply to all business-to-consumer sales.

From 1 October 2015 all members have had to include within their website, and their terms and conditions, details of any ADR process to which they are subject.

These should also be included in any letter to a consumer where you have exhausted your complaints process.

It is difficult to see how these regulations can be implemented by PRA members.

You should consider whether it is appropriate to publish details of a complaints procedure within your premises.

Any procedure should include at least details of the RMI’s National Conciliation Service, which can be found at (www.rmif.co.uk/consumers/why-use-an-rmi-member/).

CIGARETTE PACKAGING

The Standardised Packaging of Tobacco Products Regulations 2015 was passed into law in March 2015. From 20 May 2016, these regulations require tobacco products, including cigarettes and hand rolling tobacco, to be supplied in standardised packaging.

It will be an offence to supply a product in breach of the new regulations. While it will be a defence to establish that the member neither knew nor had reasonable grounds for suspecting that the tobacco product was supplied in breach of that provision, given the fact that there should be significant visual differences between the packs, this defence may have a limited benefit.

It should be noted that the tobacco industry continues to challenge this change in the law through the courts. As such there is still a possibility that the changes will be delayed, modified or even withdrawn.

We will keep members updated as this develops.

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SPAR has enjoyed phenomenal success in the forecourt sector over the past year, growing our number of sites to 945. This is a direct result of our successful relationships with several of the most prestigious and highly respected fuel partners in the petrol retailing industry.

SPAR has some of the biggest names in the industry working with us, as well as hundreds of successful independent retailers.

When it comes to our partnerships with fuel suppliers, the benefits to the retailer are twofold - great flexibility on the fuel offer and the support of a symbol group to bring a high quality retail range to forecourt sites.

As forecourt sites are seeing some of the fastest growth in the retail industry, it’s a compelling offer for independent forecourt operators across the UK.

Our diversity also shines through when it comes to in-store franchises. SPAR is leading the way in developing franchise partnerships with brands like Subway, Costa Coffee, Starbucks and Greggs – more than any other retailer in the UK.

The strength of the food offer at the fuel site also plays an ever-increasing part in the decision-making process – so offering fresh and high quality food ‘on the move’ is vital.

Our SPAR forecourt sites are ideally placed to meet this trend. Many of our stores stock a vast array of fresh and local produce as well as fuel. For example, SPAR Highworth Service Station in Swindon is a leading convenience store dedicated to high-quality, locally sourced products.

To help our retailers meet the changing needs of customers, we are constantly evolving by developing new store concepts. Whatever the size of store, we have the right format to meet its customer’s needs, ensuring forecourt retailers maximise sales and profits.

As the foremost convenience symbol group with a host of award-winning store formats, SPAR is proving itself as the frontrunner in the petrol forecourt sector – and the best choice for forecourt retailers!

We look forward to working with more entrepreneurial forecourt operators around the UK in 2016, and seeing further success with SPAR.

Get in touch today
www.spar.co.uk/own-a-store
or call 0800 980 1698
First for forecourts!

✅ Formats
✅ Food To Go
✅ Diversity

✅ Fuel Partners
✅ Retail Offer
✅ Award-winning

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or call 0800 980 1698
Membership of the PRA offers great benefits, which more than outweigh the subscription fee. These benefits include:

**KEEPING YOU INFORMED**

It’s essential that you keep up-to-date with the issues taking place in the fast changing world of fuel retailing, and the PRA can help you in a number of ways.

- **Live and Locals** and **Roadshows**, regional events where we would be delighted to meet you face-to-face and where you can expect:
  - Presentations on topics of interest and value, provided by specially selected speakers presenting on a range of subjects
  - Networking opportunities with other independent fuel retailers

All in an informal manner and at an interesting venue

Don’t forget to check our website to see when we are next near to you.

- **Petrol Heads Up** – our fortnightly e-newsletter which contains relevant and interesting articles, please ensure we have your email address so you receive it directly in your inbox.

- **Market Review and wall chart** – our annual publications sent to all members containing our review of the year.

- **Our website** www.ukpra.co.uk – recently redesigned and revamped.

Members can also access our Members’ Area, where we have placed a number of important and interesting documents. To do this simply:

  - Click on the members log-in logo on the front page of www.ukpra.co.uk
  - When you have the Members’ Area screen in front of you, use your membership number as the log in and the postcode of your billing address as the password
  - Tab down to PRA on the left hand column

You will see the list of documents

- The Members’ Area will be radically improved in 2016 to enable fast and easy access of important information.

**HELP AND ADVICE**

We have a number of experienced and friendly experts who can provide evaluation and advice on a range of important issues that impact your business.

Subject areas members can get advice on include:

- **Technical support** including support on legislative compliance, guidance on design and construction

- **Access to an HR tool kit**

- **Legal advice**

- **Conciliation and arbitration advice**

- **Payments** – credit/debit and also fuel cards

- **Supply contract advice** – which is especially important when your current contract is due.

The website contains details on how to contact us by email or via our members’ helpline telephone number.

“Many members are already saving substantial amounts of money by using our cash banking service”
SOFT TOUCH PACK. FIRMER FILTER.

GET A FEEL FOR MARLBORO QUALITY

Smoking kills

Smoking kills

Smoking kills

Smoking kills

Smoking kills

Smoking kills

Smoking kills

Smoking kills

Smoking kills

PHILIP MORRIS LIMITED

Firm filter applies to all packs shown with the exception of Marlboro Ice Blast. This communication is for the information of tobacco traders only.

Smoking kills
SOFT TOUCH PACK. FIRMER FILTER.

DISCOVER AN EASIER WAY TO STUB OUT

Smoking kills
“BigOil offers a whole range of valuable services including real-time wet stock management”

**INFLUENCING DECISION MAKERS ON YOUR BEHALF**

We meet directly with cabinet ministers, industry representatives and key players in the fuel retailing business. In doing so we are able to keep them informed as to the ‘real world picture’ of the main issues affecting members. These can then be taken into account when formulating policy. Subjects we are currently dealing with include:

- Duty deferment
- Vapour recovery
- Card interchange fees
- The ‘Living wage’
- Sunday opening hours
- Energy resilience
- Crime on the forecourt
- Re-valuation of business rates including ATMs
- The introduction of Polymer bank notes.

**MEMBERS’ SERVICES**

We have set up a range of specially selected services at preferential rates to help you run your business better. We are always reviewing these and have a number of new offers in the pipeline for 2016. Current services include:

**“BigOil powered by Vianet”**

BigOil Fuel Management comprises a range of services to help the fuel retailer maintain a profitable business and stay legal. Available as separate modules or a complete package, the services comprise:

- Platt’s pricing and margin management
- Real-time wet stock management
- Compliance management
- Contract management

Each module brings unique benefits to the retailer through a real-time web portal giving a 24/7 view at both individual site level and a complete network overview.

Further details can be accessed via www.vianetfuelsolutions.com/bigoil

**PRA TRAINING COMING IN 2016**

**Food and Alcohol**

For this training offer the PRA is partnering with the Training Matrix. The Training Matrix was established in 2002 and is a one-stop shop for all staff training, from food hygiene and health and safety to alcohol licensing courses. It has a library of templates available so you can easily create your own courses.

Your company will benefit from the huge savings that e-learning can bring, eradicating the need for most classroom based training. Staff can take themselves through the training programmes, which are built to ensure the learner completes every module properly.

You’re more likely to retain staff who feel more confident about their job, as staff will understand your business more and in turn will offer better customer service. Staff are also less likely to make mistakes when it comes to the law on food and alcohol sales.

And, because you only pay for space on the learning management system, you don’t pay for individual’s training costs. So if they leave after a week you haven’t wasted your money.

You can be safe in the knowledge that every course follows the UK and EU syllabus and that every course comes complete with its own unique CPD-approved certificate for the learner to keep and a copy for their personnel file.

- **NEW for 2016, on-line Safety and Compliance training.**

**RMI Banking**

A class-leading cash banking service – members who have used this have saved substantial amounts of money.

**RMI Card Processing**

The RMI Card processing package offers members competitive rates on all credit and debit cards, as well as rental of a terminals.

**RMI Insurance Services**

Exclusive RMI Motor Trade Insurance for all PRA members.

**RMI Utilities**

The RMI’s own utilities (gas and electricity) service, ensuring that RMI members benefit from the best prices available in the market and are not tied down to onerous contract terms.

**RMI Telecoms**

Providing services at competitive rates.

**Property Services**

Christie & Co can provide you with all the information you need on buying and selling a service station, along with details of a large selection of petrol stations for sale across the UK.

**Legal Services**

Winckworth Sherwood provides a range of legal services but, in particular, has a great track history helping forecourts with licensing issues.

- To obtain the most current information on these great benefits, please check our website: www.ukpra.co.uk
To better understand the pressures that independent retailers in the UK are facing, and to identify key trends and themes in the brand provider/retailer relationship, Accenture teamed up with the PRA to conduct a survey. The results provide insight into the customer view of the industry and, as a by-product, indicate ways in which greater efficiencies (lower costs) and greater value (higher margins and return) can be obtained from fuels and convenience retailing.

The survey results, collected from 60 PRA members, provide new insight into the UK fuels retailing industry. These insights can be categorised into three key areas of interest.

The first is the relationship between the brand provider and the fuels retailer. We find that fuels retailers believe there is much value to be obtained from having a fuel brand on site, and generally there is a large amount of loyalty by fuels retailers to their particular brand provider.

The risk that we explore in later sections is that when we are loyal, we do not have the same demands or expectations that we have of a new provider. In other words, there is a risk that without due attention, loyalty could lead to inertia with retailers not demanding the support and services from their brand providers that could make them truly operationally excellent.

Similarly, this inertia could also stifle the pace of change required in the digital and technological areas to compete with the traditional grocery retailers that are foraying into the fuel retail arena.

The second area of insight tells us about the fuels retailers’ view of their

BRAND PROVIDERS
Of our survey respondents, 64% stated that they had been with the same brand provider for over five years, and 84% said that they would renew the commercial agreement with their fuels brand provider.

This shows that many retailers see value in having the name of a renowned brand on their site – indeed 91% of retailers would recommend their brand provider to another retailer.

Conversely, many of the subsequent responses indicate that retailers feel

“Fuels retailers believe there is much value from having a fuel brand on site and generally there is much loyalty to that brand”
To better understand the pressures that independent retailers in the UK are facing, and to identify key trends and themes in the brand provider/retailer relationship, Accenture teamed up with the PRA to conduct a survey. The results provide insight into the customers. Retailers understand that customers are primarily motivated by prices and a good on-site offering, particularly in the c-store. However, an over-focus on price may lead the fuels retailer to miss out on securing the loyalty of the ever-growing group of digital consumers who are seemingly loyal to experiences rather than prices.

The third area of insight is about operational excellence. The survey results show that while retailers rate themselves well in some retail competencies, there are still several areas where improvements can be made, and indeed some further areas where retailers would like additional support from their brand providers. There is one common theme; irrespective of the topic there is a wide range of opportunities for fuels retailers and brand providers to work together to tackle industry challenges.

BRAND PROVIDERS

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Conversely, many of the subsequent responses indicate that retailers feel ▹
that the brand providers could do more to provide greater value. Over 60% of retailers say that they would want the brand provider to take more responsibility for compliance with regulation (77%), loyalty schemes (70%) and technical support (68%). Providing these services would give brand providers an opportunity to develop the relationship with their retailers further, cementing the loyalty.

With that said, while 64% of retailers are satisfied in the level of overall support provided by the brand owner, this leaves 36% of retailers that rate the support provided by their brand provider as ‘less than good’. It seems that while fuel retailers are keen to renew their commercial agreements to keep the brand on-site, the brand providers are not always providing the services and support which the retailers require in order to optimise the on-site experience for their customers. While this clearly has a negative implication for a retailer at their site, this also has implications for a brand provider across their wider network in terms of brand reputation and consumer brand loyalty.

Fulfilling the service and support requirements may result in retailers having to deal with a large number of suppliers outside of the brand/retailer relationship to deliver the services their business and customer demands.

Similarly, there are a number of areas in which fuels retailers do not rank their own capabilities highly, such as in pricing and promotions where only 18% of respondents would rate themselves as “very good”. However, when asked if they would like extra services from their brand providers, retailers often responded negatively. Brand providers need to explore the reasons behind this to help them understand how they can improve their offering.

“Accenture believes that consumers are more focused on services so loyalty is driven less by pricing and more by overall experience”

CUSTOMER VIEW
To gain an insight into the mind of UK independent retailers, we asked what they thought drove customer loyalty, and also what they thought would cause a customer to pick a different site. The top three reasons, chosen for why a customer would be loyal to a particular site, were competitive prices, cleanliness and an enticing c-store offering. Similarly, the top three reasons for why a customer would pick a different site were perception that prices were too high, a lack of on-site services, and that the forecourt was too busy.

It is interesting that price perception is such a dominant statistic here. We would agree this is most likely to be the case in the short term for B2B customers and more generally when the fuel price is high and inelastic.

However, it is likely that in the long run, as we see increased engine efficiency and the diversification of road fuels, that this factor will go down in the customers’ list of priorities when selecting a site to refuel at. As alluded to at the beginning, Accenture believes that the consumer is becoming more and more focused on service offerings, and loyalty is driven less by pricing and more by an overall experience.

In our digital world, people are time poor and tech savvy. Location and convenience will become increasingly important.

A related result is regarding the MI and customer data that is available to the retailer. Over 80% of retailers receive no MI from their brand provider, yet 22% of retailers believe that improving their customer insight and data is one of the top three activities that would add value to their operations. While some high level sales and financial data is often available to retailers, a greater granularity and variety of data would be beneficial.

As on-site services and targeted loyalty and promotional campaigns continue to mature, it is imperative that retailers know what their customers want. There is no ‘one size fits all’ approach as this will be heavily dependent on area demographics, traffic flow and proximity of different competitors. A question that’s imperative for the industry is: how can brand providers take advantage of economies of scale to help their retailers understand their customers and potential customers through provision of data and analytics?

Related to this point, only 2% of our survey respondents said they believed that having the latest technology on site was a key factor for success in this industry.

Compared with investments we see from major retail, grocery and convenience brands in new payment methods, virtual shelf labelling, self-checkout and online ordering (to name but a few), this is an alarming statistic.

OPERATIONAL EXCELLENCE
In the response to questions on operational excellence, people and process play heavily in the challenges cited by retailers. There is a perception that improved training may help with site efficiencies (37% of retailers stated that this is the top activity that would add value to their operations).

However, it is our view that improved automation of on-site

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components and management information may be more effective in achieving operational excellence, e.g., dealing with issues such as stock outages, which was the most frequent issue faced on site (42% of respondents). Notably, only 20% of retailers take inventory management support or services from their brand provider and less than 30% of retailers would want the brand provider to take a greater share of responsibility in inventory management even if the quality of input was high.

Other areas identified as having potential to add value to the retailers’ organisation and operational effectiveness included reduced energy bills (33% of retailers), improvements in customer insights and data (22%) and the ability to target promotions (22%). If the retailer is unable to take forward these opportunities alone, they should look to their brand providers and other industry experts for assistance in generating value in these areas.

Finally, stability of site systems is a common theme throughout the survey with 53% of respondents stating that their site closes on a monthly basis due to technology outages. Where average cost per outage may not be significant on a one time/one site basis, when extrapolated throughout a network and over time, the impact to both revenue and customer retention would be notable.

The challenge identified in this section is that while opportunities to improve operational excellence have been identified, these are spread across a wide number of areas (for example technological improvements, greater insight into customers and operations, and people training). Therefore, it may be time consuming and expensive to implement all of these improvements as silo’d initiatives. The question for the retailers here is two-fold. First, how do retailers prioritise the activities that will generate the most value? And second, in what areas should retailers look to supplement their own capabilities with additional expertise, either in individual areas, or in end-to-end service provision?

CONCLUSION

For brand providers, the recommendation is two-fold. Firstly, don’t take retailer loyalty for granted! We have shown that retailers see value in having a branded site to drive footfall and customer loyalty, and therefore are likely to renew their commercial agreements and even recommend their provider to others. However, in a cost-driven and increasingly challenging environment, brand providers need to continually prove the benefits of their brand in order to continue to earn their retailers’ loyalty. This is particularly true where retailers are seeking a wider range of services in their retail package.

Our second recommendation is for brand providers to review the services and support they offer retailers. Several opportunities were identified by retailers in this survey, including the responsibility for compliance with regulation and loyalty schemes. If the uptake of the services is slow, brand providers should look at why this might be.

For retailers, we have two recommendations from this survey. The first is to expect, and ask for, more from the service offerings they receive from their brand providers.

The retail site is the customer’s primary experience of the brand, and so is it in the brand provider’s interest to ensure that retailers are able to offer a high quality and consistent retail experience to each and every customer.

Secondly, retailers must have access to the right MI and customer insight. The survey shows that retailers see value in improving their customer insight. We agree with this view and believe data-driven customer insight will only become a more and more significant tool for retailers as the demands of the customer evolve and mobile and connected technologies advance.

Retailers need to know what their customers desire right now in order to develop their sites and services to continue to attract the digital consumer and promote loyalty going forward. In light of this, if the retailer cannot get this information from their brand provider, they should be looking to other industry experts and service providers to help in this area.

In conclusion, it is our view that the current “basic offering” will no longer suffice as customers want all retailers – fuel or otherwise – to provide an experience that fits with their digital life – seamless, personal and omnichannel.

Consumers are no longer happy to go to lots of different sites and locations to complete their daily tasks. They want a single place where they can fill up the tank, pick up a parcel and top up the fridge with produce that is fresh and healthy. They want to pay with their watches and earn loyalty rewards in the process. Collaboration between retailers, brand providers and industry experts is essential as the end goal is one where the basic offering is operationally efficient and the entire site is customer centric – meeting the needs of the new digital consumer and their craving for convenience in a consistent and appealing way across the entire network.

For further information about Accenture, visit www.accenture.com
“Over the past five years, PRA has become a ‘go to’ trade association recognised and respected by Government”

Brian Madderson

Lobbying – the process of influencing 
public and government policy at 
all levels – is a vital function that 
PRA undertakes for independent 
petrol retailers. This is because the 
Government and its agencies have a 
duty to meet and listen to established 
trade associations which formally and 
appropriately represent the views of 
their members. Generally, individual 
companies have difficulty presenting 
their views directly but within our 
trade sector, major oil companies 
and national supermarkets may 
ocasionally fall into such a category.

The process is two-way in as much as:

- Government may seek industry 
views for a proposed new policy such 
as tobacco and e-cigarette product 
legislation or for taxation issues such 
as business rates.
- Industry (PRA) will meet Ministers 
of key Government departments and 
their agencies to press for change to 
e-existing and proposed regulations. 
Also included are ad hoc meetings with 
constituency MPs who can more easily 
approach Government. The Shadow 
Cabinet and Ministers together with 
opposition MPs also have to be kept in 
the loop.

This past year has been especially 
busy with the change of Government, 
new MPs and many Ministerial 
changes. Issues relevant to petrol 
retailers, many requiring submission 
of Consultation Reports, have included:

- **HM Treasury:**
  - Excise duty levels on road fuels;
  - Rural fuel duty rebate scheme 
    (Phase 2);
  - Duty deferral using Excise 
    Payment Security System (EPSS);
  - Vapour recovery duty rebate 
    scheme for gasoline;
  - Interchange fees;
  - Card payments.

- **DECC:**
  - Energy resilience;
  - Emergency planning for supply 
    disruption;
  - Industry statistics.

- **DCLG:**
  - Business Rates: through-the-
    wall ATMs and 2017 Revaluation 
    Scheme;
  - National Planning Policy;
    Framework (NPPF).

- **Home Office:**
  - Forecourt Crime Senior Steering 
    Group (FCSSG).

- **DoH:**
  - Tobacco products;
  - E-cigarettes.

- **DfT:**
  - Biofuel including E10 gasoline 
    introduction;
  - RTFO.

- **BIS:**
  - Sunday Trading;
  - Living Wage;
  - Competition.

There are also essential agencies 
where contact has to be achieved 
such as HM Revenue and Customs, 
the Valuation Office Agency, National 
Measurement Office, Payments 
Systems Regulator, Financial Conduct 
Authority, and Competition & Markets 
Authority and Environment Agency.

Over the past five years, PRA has 
become a ‘go to’ trade association recognised and respected by 
Government (also Scottish 
Government, the Northern Ireland and 
Welsh Assemblies) as evidenced last 
autumn when private meetings were 
held with the Cabinet Minister without 
Portfolio (Rt Hon Robert Halfon MP), 
Minister for Energy (Andrea Leadsom 
MP), Exchequer Secretary to the 
Treasury (Damian Hinds MP) and 
the Minister for Police and Crime (Rt 
Hon Mike Penning MP). Already this 
year, I have been invited to present to 
the Minister for Energy (Fergus Ewing 
MSP) at the Scottish Government.

Details of our lobbying activities can 
be found on the PRA website (www. 
ukpra.co.uk –members’ section) and in 
Petrol Heads Up.
Petrocom

PROVIDING SOLUTIONS TO THE FORECOURT INDUSTRY

- Design
- Supply
- Install
- Maintain
- Manage

Nationwide coverage - FREE surveys
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Project Management - Vapour Recovery Inspections
Site Decommission - Civil Works (including DDA)

UK pia Safety Passports & CSCS Cards held

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Fax: +44 (0) 845 678 7820
Email: info@petrocom.co.uk
Web: www.petrocom.co.uk

Looking for an alternative shopfitting contractor...
You should be talking to Shopmate!

Shopmate offers all the services you would expect from a full service shopfitting company including all the main shelving systems, joinery, ceilings, flooring and fully certified electrical works. Energy saving and cost effective LED lighting solutions, refrigeration and air conditioning.

Shopmate has an enviable record of working with many of leading symbol groups in the forecourt and Convenience sectos to provide an unrivalled shopfitting service from small scale store upgrades to complete store relocations.

From initial site surveys, design and project planning to cost-effective and on time project execution, Shopmate can do it all.

To find out what the Shopmate alternative can do for you, call our team on 0161 881 9751 or email info@shop-mate.co.uk

www.shop-mate.co.uk
Here we provide you with a summary of the data in the latest release of the Experian Catalyst UK database. All data is based on ‘open’ sites (including sites under development and excluding non-retail sites).

### MARKET SHARE BY BRAND

Brands are listed in order of market share for motor fuel volume sales (see definition below).

<table>
<thead>
<tr>
<th>Brand</th>
<th>Number of open sites</th>
<th>Average MF volume per site (kl p.a.)</th>
<th>% Market share MF volume</th>
<th>% Outlet share</th>
<th>Effectiveness ****</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESCO</td>
<td>345</td>
<td>11,653</td>
<td>16.4</td>
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<td>1.00</td>
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<td>4,700</td>
<td>13.3</td>
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<td>3,544</td>
<td>11.0</td>
<td>12.1</td>
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<td>301</td>
<td>12,255</td>
<td>10.3</td>
<td>3.5</td>
<td>2.89</td>
</tr>
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<td>MORRISONS</td>
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<td>10,706</td>
<td>10.0</td>
<td>4.0</td>
<td>2.54</td>
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<tr>
<td>ASDA</td>
<td>277</td>
<td>9,504</td>
<td>7.3</td>
<td>3.3</td>
<td>2.23</td>
</tr>
<tr>
<td>TEXACO</td>
<td>826</td>
<td>2,614</td>
<td>6.0</td>
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<td>0.62</td>
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<tr>
<td>CERTAS ENERGY†</td>
<td>905</td>
<td>1,325</td>
<td>3.3</td>
<td>10.7</td>
<td>0.31</td>
</tr>
<tr>
<td>JET</td>
<td>331</td>
<td>2,462</td>
<td>2.3</td>
<td>3.9</td>
<td>0.58</td>
</tr>
<tr>
<td>UNBRANDED</td>
<td>682</td>
<td>689</td>
<td>1.3</td>
<td>8.0</td>
<td>0.16</td>
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<tr>
<td>MINOR BRAND</td>
<td>244</td>
<td>1,287</td>
<td>0.9</td>
<td>2.9</td>
<td>0.30</td>
</tr>
<tr>
<td>MURCO</td>
<td>217</td>
<td>1,199</td>
<td>0.7</td>
<td>2.6</td>
<td>0.28</td>
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<td>HARVEST ENERGY</td>
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<td>2,307</td>
<td>0.6</td>
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<td>2,372</td>
<td>0.4</td>
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<td>TOPAZ</td>
<td>39</td>
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<td>0.2</td>
<td>0.5</td>
<td>0.38</td>
</tr>
<tr>
<td>GLENEER</td>
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<td>0.1</td>
<td>0.7</td>
<td>0.19</td>
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<td>SOLO</td>
<td>55</td>
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<td>0.20</td>
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<td>38</td>
<td>1,232</td>
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<td>0.4</td>
<td>0.29</td>
</tr>
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<td>RIX</td>
<td>48</td>
<td>650</td>
<td>0.1</td>
<td>0.6</td>
<td>0.15</td>
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<td>THAMES</td>
<td>35</td>
<td>817</td>
<td>0.1</td>
<td>0.4</td>
<td>0.19</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8,490</td>
<td>4,237</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**MARKET SHARE BY OWNERSHIP**

The table below shows how the UK market is divided according to ownership.

<table>
<thead>
<tr>
<th>Ownership</th>
<th>Number of open sites</th>
<th>Average volume per site (kl p.a.)</th>
<th>% Market share MF volume</th>
<th>% Outlet share</th>
<th>Effectiveness ****</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPANY</td>
<td>1,215</td>
<td>5,166</td>
<td>17.3</td>
<td>14.3</td>
<td>1.21</td>
</tr>
<tr>
<td>DEALER</td>
<td>5,827</td>
<td>2,369</td>
<td>38.4</td>
<td>68.6</td>
<td>0.56</td>
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<tr>
<td>HYPERMARKET</td>
<td>1,448</td>
<td>10,858</td>
<td>44.2</td>
<td>17.1</td>
<td>2.59</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8,490</td>
<td>4,237</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DEFINITIONS:**
- **Company:** owned by the supplying oil company whose name appears on the brand sign.
- **Dealer:** an independently owned site usually supplied under an agreement with an oil company whose name usually appears on the brand sign. Also includes unbranded sites with no oil company identification.
- **Hypermarket:** owned and operated by the multiple retailers (hypermarket groups). Also includes sites that may be away from the main hypermarket store but are owned and branded by the hypermarket.

### MARKET DEVELOPMENT BY BRAND

This table compares the number of open and under development sites by brand, for the current release of data and the same period the previous year. It also shows the change in site numbers for each brand during those 12 months.

<table>
<thead>
<tr>
<th>Brand</th>
<th>No. open sites V3 2014</th>
<th>No. open sites V3 2015</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>BP</td>
<td>1,163</td>
<td>1,285</td>
<td>122</td>
</tr>
<tr>
<td>CERTAS ENERGY†</td>
<td>999</td>
<td>905</td>
<td>-94</td>
</tr>
<tr>
<td>ESSE</td>
<td>1,009</td>
<td>1,025</td>
<td>16</td>
</tr>
<tr>
<td>FOODSTORE †</td>
<td>45</td>
<td>61</td>
<td>16</td>
</tr>
<tr>
<td>GLENEER</td>
<td>65</td>
<td>63</td>
<td>-2</td>
</tr>
<tr>
<td>HARVEST ENERGY</td>
<td>106</td>
<td>90</td>
<td>-16</td>
</tr>
<tr>
<td>JET</td>
<td>303</td>
<td>331</td>
<td>28</td>
</tr>
<tr>
<td>MAXOL</td>
<td>103</td>
<td>106</td>
<td>3</td>
</tr>
<tr>
<td>MINOR BRAND</td>
<td>443</td>
<td>444</td>
<td>1</td>
</tr>
<tr>
<td>MORRISONS</td>
<td>332</td>
<td>336</td>
<td>4</td>
</tr>
<tr>
<td>MURCO ††</td>
<td>463</td>
<td>217</td>
<td>-246</td>
</tr>
<tr>
<td>RIX</td>
<td>36</td>
<td>48</td>
<td>12</td>
</tr>
<tr>
<td>SAINSBURYS</td>
<td>1,019</td>
<td>1,023</td>
<td>2</td>
</tr>
<tr>
<td>SHELL</td>
<td>139</td>
<td>132</td>
<td>7</td>
</tr>
<tr>
<td>SOLO</td>
<td>49</td>
<td>55</td>
<td>6</td>
</tr>
<tr>
<td>STAR</td>
<td>36</td>
<td>38</td>
<td>2</td>
</tr>
<tr>
<td>TESCO</td>
<td>503</td>
<td>505</td>
<td>2</td>
</tr>
<tr>
<td>THAMES</td>
<td>36</td>
<td>35</td>
<td>-1</td>
</tr>
<tr>
<td>TOPAZ</td>
<td>36</td>
<td>39</td>
<td>3</td>
</tr>
<tr>
<td>UNBRANDED</td>
<td>724</td>
<td>682</td>
<td>-42</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8,588</td>
<td>8,490</td>
<td>-98</td>
</tr>
</tbody>
</table>

**NOTE:**
- **† Food Store –** during 2014, a number of Co-op owned sites reverted to own branding and are now included under Food Store Share Brand and classified under hypermarket ownership.
- **†† The Murco number includes the Murco branded dealer sites only.**
Partnership Opportunities

We're hungry for even more stores across the UK and Ireland

As a franchisee, a SUBWAY® store can offer you:
- On-going training and support
- Regional and national marketing activity
- Proven control systems
- Waste managed at less than 1%

As a landlord, a SUBWAY® store can offer you:
- Excellent dual branding opportunities
- High rental returns
- Increased customer market share
- Flexibility in terms of space and design

For more information or to submit a location for consideration please visit
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Caroline Thomson and Alice Chalmers
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Over 2,000 SUBWAY® stores now open in the UK and Ireland
Over 500 outlets now open in non-high street locations including forecourt sites, convenience stores, transport hubs and visitor attractions

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### NUMBER OF SITES WITH A SHOP OR WASH BY BRAND

The table below shows the percentage of sites with a shop and car wash by brand.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Number of Open Sites</th>
<th>% Sites with Shop</th>
<th>% Sites with Car Wash</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASDA</td>
<td>277</td>
<td>20</td>
<td>41</td>
</tr>
<tr>
<td>BP</td>
<td>1,285</td>
<td>100</td>
<td>60</td>
</tr>
<tr>
<td>CERTAS ENERGY †</td>
<td>905</td>
<td>74</td>
<td>33</td>
</tr>
<tr>
<td>ESSO</td>
<td>1,025</td>
<td>100</td>
<td>46</td>
</tr>
<tr>
<td>FOOD STORE</td>
<td>61</td>
<td>97</td>
<td>70</td>
</tr>
<tr>
<td>GLEANER</td>
<td>63</td>
<td>70</td>
<td>51</td>
</tr>
<tr>
<td>HARVEST ENERGY</td>
<td>90</td>
<td>97</td>
<td>40</td>
</tr>
<tr>
<td>JET</td>
<td>331</td>
<td>99</td>
<td>66</td>
</tr>
<tr>
<td>MAXOL</td>
<td>106</td>
<td>89</td>
<td>65</td>
</tr>
<tr>
<td>MINOR BRAND</td>
<td>244</td>
<td>68</td>
<td>35</td>
</tr>
<tr>
<td>MORRISONS</td>
<td>336</td>
<td>99</td>
<td>90</td>
</tr>
<tr>
<td>MURCO</td>
<td>217</td>
<td>86</td>
<td>27</td>
</tr>
<tr>
<td>RIX</td>
<td>48</td>
<td>35</td>
<td>8</td>
</tr>
<tr>
<td>SAINSBURYS</td>
<td>301</td>
<td>98</td>
<td>67</td>
</tr>
<tr>
<td>SHELL</td>
<td>1,021</td>
<td>100</td>
<td>54</td>
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<tr>
<td>SOLO</td>
<td>55</td>
<td>93</td>
<td>44</td>
</tr>
<tr>
<td>STAR</td>
<td>38</td>
<td>100</td>
<td>50</td>
</tr>
<tr>
<td>TESCO</td>
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<td>98</td>
<td>50</td>
</tr>
<tr>
<td>TEXACO</td>
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<td>59</td>
</tr>
<tr>
<td>THAMES</td>
<td>35</td>
<td>77</td>
<td>60</td>
</tr>
<tr>
<td>TOPAZ</td>
<td>39</td>
<td>97</td>
<td>33</td>
</tr>
<tr>
<td>UNBRANDED</td>
<td>682</td>
<td>57</td>
<td>21</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>8,490</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** † Certas Energy – includes Gulf, Pace, Power, Scottish Fuels, Total, UK and other brands

### COMPARISON OF SHOP SALES IN RELATION TO SHOP AND FUEL SALES

The table below gives average shop sales per annum and average shop size and looks at the relationship between the two. It also shows average shop sales per annum per thousand litres of fuel sold, which gives an insight into the strength of the relationship between fuel and shop sales across the various brands.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Average Shop Sales (£’000 p.a.)</th>
<th>Average Shop Size (sq m)</th>
<th>Average Shop Sales/Sq Metre Shop Space</th>
<th>Average shop sales in £/1000 litres fuel sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASDA</td>
<td>475</td>
<td>55</td>
<td>8,620</td>
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<td>CERTAS ENERGY †</td>
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<td>204</td>
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<tr>
<td>ESSO</td>
<td>913</td>
<td>90</td>
<td>10,165</td>
<td>237</td>
</tr>
<tr>
<td>FOOD STORE</td>
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<td>7,626</td>
<td>270</td>
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<td>GLEANER</td>
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<td>43</td>
<td>4,414</td>
<td>197</td>
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<tr>
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<tr>
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<td>783</td>
<td>83</td>
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<td>496</td>
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<td>7,155</td>
<td>229</td>
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<td>10,577</td>
<td>37</td>
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<td>MURCO</td>
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<td>275</td>
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<td>48</td>
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<td>8,369</td>
<td>123</td>
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<td>7,859</td>
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<td>STAR</td>
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<td>35</td>
<td>4,650</td>
<td>166</td>
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<td>437</td>
</tr>
<tr>
<td>UNBRANDED</td>
<td>241</td>
<td>43</td>
<td>5,551</td>
<td>254</td>
</tr>
</tbody>
</table>

### FURTHER INFORMATION

For any further information, please contact:

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UK and Ireland
Experian Catalist
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Email: arthur.renshaw@catalist.com

**JAMES HAIGH**
Business Consultant
Experian Catalist
Mob: +44 (0) 777 914 0937
Email: james.haigh@catalist.com

---

**NOTE:** † Certas Energy – includes Gulf, Pace, Power, Scottish Fuels, Total, UK and other brands
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<table>
<thead>
<tr>
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<th>% Sites with Car Wash</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASDA</td>
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<td>20</td>
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</tr>
<tr>
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<td>1,285</td>
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<td>60</td>
</tr>
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<td>CERTAS ENERGY †</td>
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<td>74</td>
<td>33</td>
</tr>
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<td>ESSO</td>
<td>1,025</td>
<td>100</td>
<td>46</td>
</tr>
<tr>
<td>FOOD STORE</td>
<td>61</td>
<td>97</td>
<td>70</td>
</tr>
<tr>
<td>GLEANER</td>
<td>63</td>
<td>70</td>
<td>51</td>
</tr>
<tr>
<td>HARVEST ENERGY</td>
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<td>97</td>
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</tr>
<tr>
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<td>99</td>
<td>66</td>
</tr>
<tr>
<td>MAXOL</td>
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</tr>
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<td>MINOR BRAND</td>
<td>244</td>
<td>68</td>
<td>35</td>
</tr>
<tr>
<td>MORRISONS</td>
<td>336</td>
<td>99</td>
<td>90</td>
</tr>
<tr>
<td>MURCO</td>
<td>217</td>
<td>86</td>
<td>27</td>
</tr>
<tr>
<td>RIX</td>
<td>48</td>
<td>35</td>
<td>8</td>
</tr>
<tr>
<td>SAINSBURYS</td>
<td>301</td>
<td>98</td>
<td>67</td>
</tr>
<tr>
<td>SHELL</td>
<td>1,021</td>
<td>100</td>
<td>54</td>
</tr>
<tr>
<td>SOLO</td>
<td>55</td>
<td>93</td>
<td>44</td>
</tr>
<tr>
<td>STAR</td>
<td>38</td>
<td>100</td>
<td>50</td>
</tr>
<tr>
<td>TESCO</td>
<td>505</td>
<td>98</td>
<td>50</td>
</tr>
<tr>
<td>TEXACO</td>
<td>826</td>
<td>99</td>
<td>59</td>
</tr>
<tr>
<td>THAMES</td>
<td>35</td>
<td>77</td>
<td>60</td>
</tr>
<tr>
<td>TOPAZ</td>
<td>39</td>
<td>97</td>
<td>33</td>
</tr>
<tr>
<td>UNBRANDED</td>
<td>682</td>
<td>57</td>
<td>21</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8,490</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table below gives average shop sales per annum and average shop size and looks at the relationship between the two. It also shows average shop sales per annum per thousand litres of fuel sold, which gives an insight into the strength of the relationship between fuel and shop sales across the various brands.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Average Shop Sales (£'000 p.a.)</th>
<th>Average Shop Size (sq m)</th>
<th>Average Shop Sales/Sq Metre Shop Space</th>
<th>Average shop sales in £/'000 litres fuel sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASDA</td>
<td>475</td>
<td>55</td>
<td>8,620</td>
<td>52</td>
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<tr>
<td>BP</td>
<td>796</td>
<td>95</td>
<td>8,374</td>
<td>188</td>
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<tr>
<td>CERTAS ENERGY †</td>
<td>335</td>
<td>52</td>
<td>6,457</td>
<td>204</td>
</tr>
<tr>
<td>ESSO</td>
<td>913</td>
<td>90</td>
<td>10,165</td>
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<tr>
<td>FOOD STORE</td>
<td>629</td>
<td>83</td>
<td>7,626</td>
<td>270</td>
</tr>
<tr>
<td>GLEANER</td>
<td>192</td>
<td>43</td>
<td>4,414</td>
<td>197</td>
</tr>
<tr>
<td>HARVEST ENERGY</td>
<td>352</td>
<td>51</td>
<td>6,914</td>
<td>152</td>
</tr>
<tr>
<td>JET</td>
<td>390</td>
<td>53</td>
<td>7,310</td>
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<td>MAXOL</td>
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<td>MINOR BRAND</td>
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<td>7,155</td>
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<tr>
<td>MORRISONS</td>
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<td>MURCO</td>
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<td>SAINSBURYS</td>
<td>589</td>
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<td>48</td>
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<td>SHELL</td>
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<tr>
<td>STAR</td>
<td>633</td>
<td>69</td>
<td>9,141</td>
<td>514</td>
</tr>
<tr>
<td>TESCO</td>
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<td>10,818</td>
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<td>76</td>
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<td>THAMES</td>
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<td>TOPAZ</td>
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<td>8,547</td>
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<tr>
<td>UNBRANDED</td>
<td>241</td>
<td>43</td>
<td>5,561</td>
<td>254</td>
</tr>
</tbody>
</table>

For further information, please contact Robert Botkai, Head of Commercial Real Estate and Licensing:
T. 020 7593 6004  E. rbotkai@wslaw.co.uk

Note: † Certas Energy – includes Gulf, Pace, Power, Scottish Fuels, Total, UK and other brands.
For the majority of petrol filling station retailers, business rates is the second largest cost after wages. This is why the PRA has, over the last five years, been focused on ensuring the Valuation Office Agency (VOA) employs an equitable system for calculating rates.

Barber Wadlow, working with the PRA, was able to secure adjustments in the current valuation framework in 2010, which resulted in reductions in rates bills in the order of 10% to 25% for the majority of all petrol filling stations (PFS) in England, Scotland and Wales.

Rateable values (RVs) are, however, set to be revalued and new rates will become payable from 1 April 2017. Over the last three years Barber Wadlow (on behalf of the PRA) has been engaged with the VOA to ensure that an equitable and appropriate valuation framework is put in place. This has included numerous meetings with the VOA explaining the market approach to valuation of PFSs, and how best to resolve the challenges of developing a national valuation framework for all PFSs in England, Scotland and Wales.

Last month the VOA released its new valuation framework. While we will not know the full impact of the scheme until it has been applied to the trading figures of every site, our preliminary view is that the scheme is reasonable and we are not going to see the substantial increases similar to what was originally proposed in 2010.

Unfortunately, one of the big issues that still remains is the inequitable position between PFS c-store RVs and standalone c-store RVs. Standalone c-stores in 2010 benefited from considerably lower RVs than c-stores incorporated within PFSs. The VOA has reviewed standalone c-store values as part of the revaluation work, but it is likely that there will still be a material gap in RVs between the property types. In addition, we do have concerns about the treatment of rural PFSs, particularly sites with low fuel volumes and comparatively large shops. These sites often function as the c-store to the local rural community, but their RVs will be somewhat higher than if the c-store was standalone (ie with no forecourt). The VOA is aware of this issue, but the national valuation framework makes it virtually impossible to consider these sites any differently to other PFSs.

These sites may, however, be able to benefit from rural rate relief and small business rate relief, as well as the local authorities having the ability to award further discretionary relief. It is therefore essential that rural retailers are made aware of these rate relief opportunities to ensure that these sites are given the best opportunity to survive. Indeed, business rates can have a hugely detrimental impact on these businesses, which are a vital part of the UK’s fuel retail network – if sufficient relief is not forthcoming, the Local Authorities will need to be made aware of the damage that they could cause to local communities as a result of the closure of such forecourts.

Barber Wadlow is a niche property adviser to the fuel and automotive retailing sectors, offering high-quality advice that is tailored specifically for the individual client. If you would like to discuss a property matter in more detail, please contact Adam Wadlow on 07814 692312 or email: adam.wadlow@barberwadlow.co.uk or Amanda Barber on 07831 820613/ or email: amanda.barber@barberwadlow.co.uk
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the future of forecourt management
FOCUS ON GROWTH

Steve Rodell, Head of Retail at Christie & Co, looks at the state of the forecourt property market

Since 2001, the number of petrol filling stations has decreased by 31% and those forecourts that have weathered this reduction have experienced a significant shift in ownership over the past decade. Oil company sites have steadily moved into independent dealer ownership, while supermarket ownership has grown over the same period. This shift has principally been driven by the focus on the convenience and food-to-go offer with customers now expecting far more from petrol forecourts than they did 20 years ago.

Last year we were involved in valuation and advisory projects relating to many of the high profile group deals including the acquisition of Brobot Petroleum by HKS Retail. The culmination of Esso’s disposal programme of 201 sites saw 104 head to Euro Garages, 78 to MRH (GB) and 19 to Rontec Investments. Shell also sold 183 sites: 90 to the recently enlarged MFG, 68 to Euro Garages and smaller groups to others in the Top 50. The four ‘super dealers’ in the market; MRH, Euro Garages, MFG and Rontec now own 12% of all sites in the UK.

Oil company disposals offer a great opportunity for independent dealers. Many oil company sites have strong fuel sales but under-invested shops. The independent market has proven time and again that it can compete with the supermarkets/corporate convenience operators to maximise the retail offering and sales through symbol branding, introducing new income streams and great customer service. This is a driving factor in the market.

The last year has also seen significant private equity activity. US firm Clayton Dubilier & Rice’s investment in Motor Fuel Group saw it take an 85% stake in the 370-strong ‘super dealer’ completing a spectacular period of growth for the dealer group having not long purchased Murco. TDR Capital LLP invested £1.3bn into Euro Garages for a minority stake. Private equity firms usually want to take control of companies in which they invest. However, this deal shows a willingness to take a minority stake for the right opportunity and underlies the strength of the Euro Garages brand and management. While this deal reportedly priced Euro Garages at around 11.5 times earnings, the actual value remains a topic of debate across the market centred on what earnings the price relates to: historic, run rate or projected?

Looking ahead to 2016, Christie & Co anticipates some interesting activity among dealers which hold 100 or fewer sites. HKS has recently acquired Brobot Group, increasing its total site count to just under 60. Christie & Co led the bank valuation for this acquisition and worked closely with HKS to secure the sites from Brobot. We believe there remains a desire in the market for further consolidation.

Strong appetite also remains for single freehold sites and Christie & Co has experienced a significant and increasing level of interest in the businesses we have brought to the market. Driven by this increased demand and the desire from banks to lend into the sector deals suggest an upward shift in EBITDA multiples.

Operators looking to exit the sector have considered leasing their sites rather than selling their freehold interest. Where the right opportunity presents itself, significant rents or premiums can be achieved. Resulting investments can be traded in the property market at yields as low as five per cent for ‘Blue Chip’ covenants. Lower volume sites are still in demand often from smaller independent groups or new-to-industry operators.

At the lower end of the market sites are either sold to a ready supply of first-time buyers or developers where alternative use yields a greater value. Transactions in 2015 have been driven by these groups at the top level, but there remains a constant demand for single sites from smaller regional multiples, single site operators and new-to-industry buyers. We expect more in 2016.
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PRA EVENTS
PROGRAMME 2016

Don’t miss out on our ‘must attend’ events

LIVE & LOCAL

• BRIGHTON Amex Stadium Thursday February 25
• BELFAST Stormont Hotel Thursday March 3
• PLYMOUTH Future Inn Hotel Thursday March 10
• NORTH EAST venue TBC Wednesday April 13
• WEST MIDLANDS venue TBC Thursday May 5

PLEASE NOTE: we will be confirming our autumn Live & Local dates and venues later in the year.
Keep an eye out in Petrol Heads Up and on the website (www.ukpra.co.uk) for more details

What you can expect from attending a Live & Local event:
• Boardroom/table style seating rather than lecture theatre rows so it’s more informal and encourages greater involvement.
• Local retailer(s) presenting their new ideas, embracing both forecourt and shop developments.
• More time allocated to Q&A sessions with retailers, sponsors and PRA staff contributing.
• Market updates and latest challenges to Government.
• Carefully selected sponsors will bring you product and service opportunities.
• New and interesting venues – all with plenty of FREE parking and easy road access.
• These events are morning only so you’ve time to return to your business before the end of the day.
• A FREE buffet lunch is offered – more than just a sandwich!!
• These events are free to attend for members and non-members.
• Registration for the event is available online

ROADSHOWS

• MANCHESTER Cottons Hotel Thursday March 17
• SCOTLAND Larkhall Wednesday May 11
• EXETER WestPoint Thursday September 8
• HINCKLEY Sketchley Grange Thursday October 13
• WAKEFIELD Cedar Court Thursday November 17

These are based around the Roadshows organised by Thames Communications, which are exhibitions of suppliers to the forecourt industry. The PRA has a breakout room and presents together with invited sponsors.

➤ For full details of all our events, see Petrol Heads Up or visit www.ukpra.co.uk
Gadget, the retail genius, has announced that it is going global and expanding into international markets in 2016.

Their unique retail concept for mobile and tablet accessories has revolutionised the UK forecourts industry over the past few years and Amir Layeghi, the Managing Director of Gadjet, has confirmed the expansion. "I am very excited to announce that we are expanding internationally in 2016," he said. "We have seen exceptional success since we launched Gadjet in the UK and the time has now come to share our retail concept in other countries."

Launched in late 2013, Gadjet has become a leader in supplying mobile and tablet accessories to forecourts and convenience stores in the UK. They are one of the fastest growing companies in the industry and have a robust relationship with many of the Top 50 Indies.

"We have had Gadjet products in our estate of petrol forecourts since the end of 2014, they have proven to be an enormous success with many repeat purchases, customers really appreciate the quality of the product. I would have no hesitation in recommending Gadjet products and look forward to continuing our flourishing partnership."

Chris Loach, Operations Manager of HKS

Gadjet has also confirmed that they will unveil a brand new range of products in early 2016, including many Apple Certified mobile and tablet accessories. They have made it their mission to ensure their products are consistently updated and that they supply the best of what the industry offers.

"Gadjet products are colourful, high quality and up to date," said Robert Campbell, Director of Intake Developments Ltd. "The display stands are compact and eye catching. Best of all we are on course to sell about £50,000 of their stock this year, at a good margin. I would always recommend Gadjet to other retailers."

Aside from the high profit margins it offers its trading partners, Gadjet’s success also lies in the high quality, reliability, and selling rate of its products. All this has resulted in a return rate of less than 1% - far below the industry average. It is also consistently praised for its excellent service and the strong relationships it builds with its partners and consumers, which is one of the driving factors that has enabled it to expand into international territories.

Joe Brough, Director of Manor Service Stations Limited said, "Gadjet has proven to be a profitable and well-presented supplier to all our service stations. Customers are happy with the range of products which are closely monitored and updated by Gadjet to ensure that they are all up to date."

Gadjet has proven itself to be the most successful supplier of mobile phone and tablet accessories to forecourts and convenience stores in the UK, and it will now do so across the globe.

For more information about Gadjet and its products, please call 0121 546 0300 or visit www.gadjetsupply.com
I’t’s not every motorway service area (MSA) that can say it was officially opened by HRH the Prince of Wales but then again Gloucester Services on the M5 is unlike any other MSA on our busy road network. And this is why it took the top prize at the Forecourt Trader of the Year Awards 2015. The Awards’ judges described it as “something really special”, so much so that it’s becoming a destination for thousands of motorists and commercial drivers as they drive along the M5.

“You have tried to create somewhere where people would like to spend a bit of time... taking in the views and browsing in the shop”

LAURENCE KING

SPECIAL SERVICES

Find out why awards have been heaped upon Gloucester Services

Laurence King, managing director of Westmorland, collecting the Forecourt Trader of the Year Award 2015

You know you are in for something a little different before you even get to the Services themselves. And that’s because the signage on the motorway is a traditional ‘blue’ sign with symbols such as a knife and fork representing what’s available rather than logos from fast food chains.

Laurence King, managing director of Westmorland, says: “I wouldn’t begin to think that everyone who comes into Gloucester knows our story, but they can see straight away that we are different and that starts with those header boards on the motorways. We have tried to create somewhere where people would like to spend a bit of time. That might be a tired traveller who wants to spend half an hour off the road, sitting comfortably taking in the views or browsing in the shop. Or it might be a family on their way back from their holiday and I like to think that we can still be a part of that holiday.”

Visitors to Gloucester Services are met straight away with a beautifully landscaped site, all done to reflect the local area. Inside, it’s particularly spacious with a design where old meets new so bold wooden beams have the latest light fittings strapped to them. There are stunning stainless steel chiller units and tables set up that are filled with mouthwatering cakes and scones.

There’s a kitchen, a cheese shop, a farm shop, a cheese counter that would put most high street stores to shame, a butcher’s counter and even a fishmonger on the southbound site. Says Laurence: “It’s just like a Harrods food hall and from a consumer perspective, I love it.”

Much of Gloucester Services’ ‘specialness’ comes from the fact that it’s owned by a family firm – Westmorland. Their story begins way back in 1972 when local farmers John and Barbara Dunning set up Tebay Services in partnership with local bakers on the M6. It was the first family-run motorway service station in the UK and is still there today.

In 1976, the Tebay Services Hotel opened and over the next 10 years, a caravan park and truck stop followed. In 2004 the family’s farming roots inspired the creation of two farm shops followed by in-store butchers.

Then in 2014, Gloucester Services, on the M5 (northbound), opened followed by the southbound in 2015 – with the aforementioned Prince of Wales presiding over the official opening. At the time of his visit, Westmorland chief executive Sarah Dunning told local press that the Prince summed up the philosophy of the...
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services, promoting local produce and local communities.

Food and other items are sourced from more than 130 local suppliers within 30 miles of the services, with a further 70 suppliers used from across the South West. Meanwhile, one-third of the staff at Gloucester Services have been employed via the Gloucestershire Gateway Trust’s (GGT) academy programme, which aims to get the long-term unemployed back into work. But that’s not all as a percentage of the Services’ revenue is donated to GGT with around £10m expected to go to six local charities over 20 years. These charities’ work is communicated at the site via murals and a gallery so shoppers can see where some of the money they are spending is going.

“Our offer is clean and clear, we are rooted in the local community,” says Laurence. And that local community loves the site as some of them visit for their Sunday lunch. However, he says most visitors are passing through the area. And there are many passers by as Gloucester has 40,000 vehicles driving past each way every day.

Other facilities on site include a free-to-use ATM and, for those visitors wanting a longer break, there is designated caravan and motorhome parking. On the forecourt, there is free air and water and an ecotricity point.

Says Laurence: “Nobody has ever asked for anything we haven’t had. We don’t do fuel bunkering because we have no provision for queues but we do non-bunkered HGV fuel and we have high speed pumps for that.”

The bar is set high at Gloucester so it’s important to keep abreast of trends. Laurence says: “We look at trends in London and around the globe. We have a team of people who research and buy products and we have local farm shop buyers in Cumbria and Gloucester. Sarah is very, very passionate about our offer and a constant agitator for innovation; she never lets the grass grow under our feet.”

Laurence says trading wise, they are at least a year ahead on their targets.

“Gloucester Services has been extremely well received and I think a lot of that is as a result of the number of awards we have received. We’ve had a lot of press coverage; we like people to know what we do.”

On winning the Forecourt Trader of the Year Award, Laurence says: “It’s extremely important because in the industry we are in, we are not allowed to advertise so we are only as good as our reputation. All our competitors use brands to achieve their success but we rely on reputation and quality. Therefore it’s great that we get recognised – it tells more people about us and then they may visit us or want to supply us or even want to work for us. It’s all positive as far as we are concerned.”

As well as the overall Forecourt Trader of the Year award, Gloucester Services picked up the Best Community Engagement award, Best Design & Development and Best Motorway Services Outlet, while Laurence was voted Retailer Champion by his peers. But it’s not just Forecourt Trader awards that have been heaped upon Gloucester Services, it has won many more including a Civic Voice Design Award, an award for Best Cotswold Menu at the Cotswold Life Awards and the Western Daily Press Food & Farming Award for Outstanding Contribution to Local Food Development.

“I think the model we have – being a family business – few others have. And I think we are successful because we really believe in what we do and our market likes what we do. I like to think of our site as an oasis of tranquillity,” says Laurence.

This year he expects the family firm to be busy with Cairn Lodge on the M74, about 35 miles south of Glasgow, where they are investing in upgrading the facilities.

“Once that’s done it means people travelling from Inverness to Cornwall can do Westmorland all the way,” he says.
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PRA PETROL RETAILERS ASSOCIATION
Many of the best convenience stores in the UK can now be found on forecourts, a fact that is demonstrated by David Charman’s Parkfoot Garage taking the top accolade in the Convenience Retailing Awards in 2014. David’s shop is one of many with a name above the door and that name is not his. That’s because, like many forward-thinking independent retailers, David has chosen to pair up his business with a symbol group. The reasons are clear: you get a trusted name above your door that shoppers will instantly recognise; you benefit from bigger buying power and so better prices; you have access to the sorts of promotions that shoppers have come to expect from the superstores (and sometimes they’re even better); you can stock award-winning own label ranges; you’ll get marketing support – anything from TV and radio advertising to leaflets; and lots of other back-up for things like HR and store development. Obviously there’s a price to pay but that varies from group to group – whether it’s a straightforward fee or your commitment to buy a certain percentage of stock from them.

Spar reported “fantastic growth” in store numbers last year. Between May and October 2015, it increased its network from 2,393 to 2,578 outlets – an increase of 185 stores, or 8% in just six months.

This growth was put down to a number of factors, including existing Spar retailers increasing their store portfolios; new retailers joining; national account store numbers growing; and the addition of a large number of stores from Euro Garages.

Debbie Robinson, Spar UK managing director, says the group has worked tirelessly to develop innovative new store formats, an award-winning own label product range and a wider breadth of services than ever – and it’s paid off.

The Spar name can currently be found on around 945 forecourt stores, with the group working with some of the biggest names in the industry including – Roadchef, the aforementioned Euro Garages, Harvest, Jet, HKS and MFG, as well as hundreds of successful independent retailers.

With Jet, Spar recently entered into a five-year agreement to give the company’s 350-plus dealers access to four bespoke levels of retail support. Existing Jet dealers – and any new sites joining the network – can enter into a symbol partnership with Spar. The package is aimed at larger convenience stores that would like to be part of the Spar brand with multiple retail formats.

 Meanwhile, the group’s ongoing arrangement with Harvest is designed to give dealers a better price at the pump. The idea is to give retailers a toolkit to develop sales and profitability. So retailers can choose whether they have the shop and forecourt all branded Spar, or the shop Spar and pumps branded Harvest.

Nisa too can offer its own branded fuel. The group’s partnership with Greenergy provides members with a transparent, competitive fuel offer allowing them to compete in our very price conscious marketplace.

THE FORECOURT DIFFERENCE

Even though the convenience store is a strong component of any decent forecourt nowadays, many of the symbol groups have realised that forecourt stores are different. Daniel Quest, retail director, Costcutter Supermarkets Group, says: “As one of the largest forecourt retailers in the UK, we have a dedicated forecourt team which works with retailers to develop stores that meet the varying needs of the diverse forecourt store customer base.

“We support independent single site operators all the way to large scale operators like MFG and it’s our ‘freedom within a framework’ approach that enables retailers to draw on our...
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Steve Vaughan, Londis Handbridge, Chester
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Vince Brown on 0808 178 8644
forecourt team too, which looks after
the group’s 402 forecourt sites. Londis
brand director, John Pattison, says the
team is in place to provide forecourt
retailers with the best business
support to satisfy their shoppers’
needs for a modern convenience offer
and ultimately improve profitability
and drive your business forward.

There are currently 35 Budgens
forecourts across the UK. “It’s an
exciting time to be in the forecourt
business,” says Budgens director Mike
Baker, “and there’s a great opportunity
for success providing you choose the
symbol group that is right for you.

“The trends for shopping locally,
buying good food on-the-go and
shopping little and often are showing
no signs of slowing down, and
Budgens forecourts are well-placed to
capitalise on all of these things.”

Finally, within the last year, Nisa has
developed its Store of the Future Two
format, which has resulted in many
retailers achieving a double-digit uplift
in sales since conversion. This is down
to the fact that the Nisa team looks
at different store formats, customer
demographics and shopping missions
to ensure the right one is implemented
in each location.

Symbol groups may seem the same
but they are all different so if you’ve
been thinking about joining one,
you’ll need to shop around to ensure
you pick the right one for you, your
business and your customers.

expert support and best practice
guidance, while also giving them
freedom to create a truly local offer for
their community.”

At Bestway, symbol director James
Hall, says they too recognise that
the forecourt sector is an important
marketplace in its own right: “We
therefore treat the format differently
by not simply bolting on our
convenience store solutions – the offer
and services need to be different. We
are working hard to deliver the right
package for forecourt retailers and have
invested in a bespoke team to support
multi-site forecourt operators as well
as tailoring the promotion and ranging
requirements to deliver the right
offer in store – from great food-to-go
solutions through to consumer offers
that offer strong margins.”

And at Londis they have a dedicated

Figure 1: Membership of a symbol group can help you portray a more professional image

THE SYMBOL SALES OPPORTUNITY BY HIM!

Forty-three per cent of shoppers on forecourt symbol
sites are buying fuel only; 27% buy fuel and shop items;
and 30% use just the shop. But it’s those just buying
items from the shop who visit the most – popping in
times a week – while those buying fuel and shop
items visit once a week; and fuel-only customers 0.8
times a week.

Research firm Him! says symbol forecourt retailers
should adopt a two-fold strategy to drive footfall.
Firstly they need to encourage fuel-only shoppers to
buy items in the store. To do this, it recommends that
retailers identify barriers to shopping; improve shopper
perceptions; and ensure their range is suitable for their
shopper base.

Secondly, retailers need to increase the shopping
frequency of existing users by ensuring the food-to-go
mission is always catered for and by driving those
all-important top-up sales.

The most important factors for symbol forecourt
shoppers are those for most convenience shoppers ie
product range and availability, speed of service, ease of
shop and staff helpfulness/friendliness.

Ease of shop and speed of service are particularly
important when you consider that 58% of customers
leave their car parked at the fuel pump. Many of them
will be mindful of this and want to be as quick as
possible in the shop.

Him! says fuel mission shoppers are on autopilot –
with a view to getting in and out as quickly as possible.
Therefore it advises retailers to use efficient queuing
systems, maximising the space available with items
positioned within arm’s reach so they can make impulse
purchases while they are waiting to pay.
We are stronger than ever, with more members than ever before

We now have more Costcutter, Mace, kwiksave and Supershops members than ever before, and new stores are joining every month.

Retailers like the strong positioning of our brands and over £5m is currently being invested in store redevelopments. Through the BuyCo we have the largest volume buying power in the UK convenience sector, over £5bn.

Our new space planning and category management systems have delivered a 16% increase in sales in store trials and we continue to invest in our Activ Technology programme.

Retailers are already benefiting from our new ActivOC and ActivHUB systems which are putting them in control of their business and helping to drive sales.

We have a dedicated team who work with over 700 forecourt retailers to develop stores that meet the varying needs of the diverse forecourt store customer base.

If you want to be part of an exciting change in the convenience sector call us on 01904 486543 and let’s have a conversation. Or visit us on www.costcuttersupermarketsgroup.com
In the past 10 years the industry has experienced major changes, distribution of refined products to the consumer once dominated by the major brands with their own fleets and company-owned sites has diminished, and the days of having their brand on the delivery road tanker and canopy are not seen as a high priority.

Strategies on promoting brand have changed as major oils worry about adverse publicity from incidents, shareholder value, unionised contractors (hauliers) and declining margins. So what is next? Oil companies still want to sell products, but they seek less responsibility in the distribution chain. Therefore to achieve this goal, ex-rack selling seems the answer. Although at the moment the canopy brand remains through fuel supply contracts, but for how long?

Entrepreneurial companies have re-invented the retail service station into a competitive corner shop and a place to grab fast food of quality, the catalyst though for success remains the pump price as this drives footfall into the shop, it’s working but is the retailer that interested in fuel?

Fuel delivery is a key factor in working out costs

Changing the way fuel is supplied to retail service stations. A fuel supply contract that comes with a branding package delivered to site and supported with promotions etc is very attractive and offers an easy way to obtain fuel without hassle. But what if you could reduce your fuel cost by between £0.01p-£0.03p per litre, a significant reduction, especially for multi-site operators. Would you consider this option? Welcome to ex-rack!

An example of the type of benefits ex-rack could bring: a retail station located in Leicester, which would normally be supplied through Kingsbury, goes ex-rack and can purchase fuel at £0.015p per litre cheaper from Immingham than Kingsbury.

By taking into account haulier costs, a delivered load of 37,500ltrs of fuel could realise a financial benefit of £430 per load. If the site sold 3.5m litres per annum then a gross financial gain of £40K per annum is achieved. For a retail group with sales of 60m litres per annum, £688K is hitting the bottom line. And this example is only taking £0.015p per litre difference, a £0.03p reduction.
He has Lomosoft “WinDMS”, this could be you?

- Connects to your tank gauges and EPOS for real-time stock data collection.
- Forecasts your stock usage and matches demand against supply and price.
- Optimises your deliveries & resources to reduce logistics costs.
- Integrates with your current E.R.P. systems for ease of data transfer.

Call 07815 541236 to find out why Lomosoft WinDMS is fast becoming the number one choice for retail station operators, hauliers, fuel refiners and wholesalers.

www.lomosoft.com
With the refining industry in the UK shrinking, more fuel being supplied from newer highly efficient refineries in the Middle East and Asia plus, at the current time, a world fuel glut, non-refining fuel suppliers are acquiring refined product in the open trader market often under benchmark Platt’s (remember this is a close-of-day price at 16.30) giving terminal type operators significant opportunity to offer fuel supply at highly competitive prices against home-based refiners.

Consequently there are a number of fuel suppliers and terminal operators who want to push volume. They currently sit in a halfway house offering fuel supply contracts and ex-rack, watching and learning where the opportunities sit. However, ultimately fuel trading is their expertise and an ex-rack agreement would be significantly advantageous to them.

The USA is basically an ex-rack market, driven this way by all of the factors I have already mentioned.

**HOW DOES EX-RACK WORK?**

Firstly, go to the open market, do not dismiss your current fuel supplier, and discuss fuel price and supply points (distance from collect to delivery points may not be a factor as given in the example). All will be happy to look at deals, especially if there was a term to it. Consider fuel allocations if a termed contract is preferable, especially across several supply points. A fuel supplier may offer price differentials depending on their supply point, and give you flexibility to pull from any, this could reduce distribution costs.

Secondly, how would the fuel be delivered? Can the fuel supplier offer a delivered-in price? Or should you independently go to the logistics market and negotiate an arrangement?

Tanker hauliers have suffered with their old fashioned major oil contracts decimated, gone are underwritten asset type contracts and in are ‘shared user contracts’ so they are keen to find new customers. The haulier is faced with its own logistically nightmare with ex-rack, where vehicles are located, and the costs of repositioning them. Therefore it may mean a UK-wide retailer needs to have several contracts or appoints a single haulier and negotiates a 4PL arrangement. (The main haulier sub contracts the work to others if they cannot cover the delivery)

Thirdly, stock management. Do you have an arrangement with a data management company where tank gauging and sales are monitored and stock management undertaken? This is key to ensuring stocks are kept to a minimum (cash flow) and order generation automated. Keeping stocks low means faster price reaction to a falling market, and the ability to stock quicker at a lower price in a rising market.

Fuel supply negotiations will remain fluid as an ex-rack long term agreement is short term, probably just one month only; this maintains price advantages and competitiveness driven between the suppliers.

Consider who and how will you manage the suppliers; a highly integrated software system will be required such as Lomosoft WinDMS. Then is it the retailer, the fuel supplier, or the haulier who will operate and own the system? Depending on your company size and who you trust will determine this.

**USA retailers have realised that**

operating a forecourt is a first step in a highly lucrative consumer sales opportunity, the brand is about them and their offering, creating consumer satisfaction at all points of sale, hence developing a desire for the consumers to return, fuel is but one part of the consumer experience.

Fuel and stock management is key to driving footfall and managing cash flows; creating higher margins from fuel sales is necessary to increase overall EBITA. Taking price advantage over constrained competitor forecourts who do not have ex-rack flexibility wins business.

Of course, there are some negatives to ex-rack. These include:

Smaller retailers, especially those with only one site will find it hard to drive a lower price with suppliers and organise logistics; however by grouping together maybe it’s possible.

Premium grade products are very much brand related, these will only be available from certain sources. If premium grade is necessary, then a “milk round” service for deliveries between sites should be considered.

Fuel supply contracts offer you a package, with ex-rack you are on your own. Building a brand could be expensive and time consuming.

Supplier and haulier credit arrangements could be difficult to arrange with no long term commitments.

The birth of ex-rack has happened, numerous retailers are considering their direction, and evaluating the pros and cons The next five years will determine the future of ex-rack in the UK, and who will manage their stock and logistics.

Chris Dalton was previously European Managing Director of Heil Trailer International (Dover Corp), the largest road tanker manufacturer in the world. He has established and operated major logistics contracts in Sweden, Ireland and the UK for the delivery of fuel and lubricants. He now acts as a consultant on the transition from 3PL to 4PL logistics in downstream operations, and the optimisation of fuel procurement, stocks and logistics to retail operators.
Looking for more than just commercial properties? Like the most trusted, most timely advice and market expertise in the forecourt sector. And a range of specialist services, built around you?

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We believe we offer the best possible proposition for dealers based on: security and quality of supply, value for money, unrivalled service, reliability and support for your business. We'd love to have a conversation about how we could help your business thrive now and into the future.

Call us on **01926 404 333**, what we offer might surprise you.

"Joining JET has boosted our fuel volumes by 2.5mlpa to date"

— Seevaratnam Muresh, Emsworth Service Station