

Market Review 2026



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GORDON BALMER
EXECUTIVE DIRECTOR

A very warm welcome to the 2026 *Market Review*, this year's theme is our motto "Together we are stronger". Given the uncertain economic outlook and increased government scrutiny, it has never been more important to support your trade association. This year has been another challenging one for both the country and our sector – and the PRA and CWA have been hard at work actively representing your interests and keeping you informed on key developments.

At the start of the year, we continued to work on the Fuel Finder scheme (FFS), which was to be launched with the objective of boosting fuel price transparency and competition. We engaged closely with the Department for Energy Security and Net Zero (DESNZ) and the Competition and Markets Authority (CMA) to ensure the scheme is both practical and effective. Key successes were to persuade DESNZ to postpone the requirement to report grade-outs at each forecourt, and the requirement to report on-site amenities down from a proposed list of ninety-six to eight, thus eliminating much time-consuming bureaucracy. We are continuing our dialogue on the registration scheme and as we go to press are fine-tuning it with DESNZ ahead of the opening of the registration process on December 18, 2025.

We are also working with the CMA on their quarterly reports as to the state of the Road Transport Fuels market to ensure that the reports are both complete and fair. This is critical to counter the unhelpful and misleading narrative advanced by the motoring organisations on profiteering from fuel sales.

Another issue that we have represented members on is the change to inheritance tax rules on business property relief. This particularly affects family-run businesses, and we have engaged with Family Business UK to highlight this to the Government.

We have also represented our Northern Ireland members on business rates and are pleased that our input resulted in a good outcome for them.

Concerning the plague of forecourt crime, we finally succeeded in gaining electronic access to the DVLA database, thereby replacing the cumbersome and slow paper-based system. This means that access to vehicle keeper details is significantly improved, speeding up debt recovery from drive-offs and no-means-to-pay incidents. Several debt recovery companies have now signed up to the scheme, and we hope this delivers a marked improvement in debt recovery.

To keep you informed of these issues and to understand what's on your minds, our team have travelled the length and breadth of the UK. We put on five Business Breakouts and five Roadshows, all of which have been well attended.

The CWA has also been hard at work pushing for a level playing field for the car wash industry with the Government. We hosted a successful House of Lords seminar with CWA member Waves and Nottingham Trent University on a national registration scheme for hand car washes to tackle non-compliance. Following this we have now learnt that the Government is to launch a crackdown on illegal working at hand car washes and nail bars.

Our sector and members are resilient and can adapt to change and I am very confident that we have a very promising future in providing on-the-road facilities, to keep the country going. We also have the potential of alternative sources of revenue from enhanced convenience stores and modernised car washing facilities to replace revenues affected by the switch to EVs.

Thank you for your continued support – and now more than ever: "Together we are stronger."

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REVIEW OF 2025

PRA Executive Director Gordon Balmer looks back at another busy year for the forecourt sector



Gordon Balmer

JANUARY



► PRA calls for Inheritance Tax rethink

Around 20 PRA members have so far written to the Prime Minister to call for a rethink of plans to cut Inheritance Tax Business Property Relief (BPR) announced in the Budget in October 2024, as a campaign against the proposals gathers momentum.

It comes after Keir Starmer answered an MP's question during Prime Minister's Questions in the House of Commons on December 18, asking for the details of a particular farmer's concerns on Inheritance Tax to be passed onto him.

► PRA launches 2025 members' survey

Now 2025 is properly under way, the PRA team would like to hear your views on the year ahead, writes PRA executive director Gordon Balmer. To ensure we articulate your views, it's important that we engage in dialogue with you.

FEBRUARY



► Combatting crime in forecourts

The PRA continues to work closely with police to highlight members' concerns over the significant cost of shoplifting, fuel theft and in-store crime to their

businesses, as latest data shows retail crime is at an all-time high.

► Inflation rise chills UK business again...but is spring around the corner?

UK inflation rose more than expected at the start of 2025, reducing the chance of an interest rate cut next month. The consumer prices index (CPI) measure rose to 3% in January, the Office for National Statistics reported on Wednesday (February 19), up from 2.5% in December.

MARCH

► Production push dampens oil prices

Oil prices fell to a four-month low on March 4 following the Organization of the Petroleum Exporting Countries and allies (OPEC+)’s surprise announcement of increased production from April. OPEC+ will increase oil production by 138,000 barrels a day in April, with plans to restore 2.2 million barrels a day by 2026.

► Fuel prices volatility

Fuel prices are expected to drop in the next couple of weeks following a drop in oil prices, which fell from above \$80 per barrel in mid-January to around the \$70 level this week. The fall in oil prices comes as supermarket Asda risked kicking off a supermarket fuel price war as it announced on March 14 that it has put in place an immediate 4p cut in the price of both petrol and diesel at all Asda and Asda Express forecourts.

APRIL

► CMA report overlooks fixed cost rises, says PRA

The PRA said it was disappointed that the Competition and Market Authority (CMA) had not factored in the increased fixed costs that petrol retailers were facing after it published its latest Road Fuel quarterly update on March 31. The update, which gives its observations on developments in the road fuel retail market since the previous update in November 2024, says: "Fuel margins remain high compared to historic levels, which suggests that overall competition in the road fuel retail market remains weak."

► Fuel theft costs average £315-plus per site in March

Latest data from forecourt crime prevention provider Forecourt Eye shows that the average retailer was more than £315 out of pocket per site in March due to fuel theft, with the number of thefts up on March 2024. The number of fuel loss incidents reported by sites in March 2025 was 9.6, up on March 2024 when an average of 8.1 incidents was reported per site over the month. The average value of fuel withdrawn during drive-offs was £44.94 in March, which was down from £52.09 in March 2024

MAY



► PRA raises fuel finder query

The PRA has raised concerns about a proposal from Department for Energy Security and Net Zero (DESNZ) that petrol station operators report "unavailability" of grades of fuel within the planned Fuel Finder scheme. This proposal was not included as part of the original consultation on the Fuel Finder scheme. It is unclear what 'unavailability' refers to – a shortage of fuels at a filling station overall or at the pump; does it apply to super grade fuels; or include all possible causes of unavailability such as power cuts, technical faults with pumps, or restocking?

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► **Fuel Finder contract awarded**

The PRA has welcomed confirmation from the Department for Energy Security and Net Zero (DESNZ) that it has now awarded its £3m contract for the planned Fuel Finder scheme. The initial two-year contract has been awarded to VE3, a new name to the forecourt market, a company which describes its expertise as spanning “across key areas, including cloud, data, AI, cybersecurity and more”. The company has offices in the UK, New York and India.

► **Drive-off crime still costs fuel industry millions**

Drive-offs and other forms of non-payment at forecourts are costing retailers millions – and the scale of the problem is likely much, much bigger because of under-reporting of crimes. Reports in the national press last week put the figure as at least £6.5-£7m of fuel stolen in more than 130,000 drive-offs (DOs) at forecourts over the past five years although this is likely to be a gross underestimate.

JUNE



► **DVLA scheme set to launch to tackle fuel theft crime**

A new scheme to allow individual forecourt operators and cost recovery agencies access to the DVLA's Vehicle Keeper data electronically in the event of fuel theft, rather than applying by post, is soon to be rolled out. The Police Crime Prevention Initiatives team has been working in partnership with the DVLA, the National Business Crime Centre and the Home Office in developing an assurance framework that will accredit fuel retailers and cost recovery agencies to use the DVLA's electronic service, called the Keeper at Date of Event (KADOE) API.

► **Fuel unavailability dropped from Fuel Finder scope**

The PRA has welcomed government confirmation that fuel retailers will

not have to report “unavailability” under the new Fuel Finder scheme, at least at launch. A letter to fuel sector representatives from Dr Miatta Fahnbulleh, Minister for Energy Consumers, received on June 25, states that the Department for Energy Security and Net Zero (DESNZ) is to: “postpone the requirement to report on fuel availability and refocus the Fuel Finder scheme on its core principle: providing price data transparency to the consumer.”

JULY

► **Harvest Energy dealers' uncertainty**

Harvest Energy dealers say they have been left in limbo following the collapse of Prax Petroleum and its parent company State Oil Limited on June 30. Harvest Energy, a Prax Group subsidiary, has 86 dealers, from single-site to multi-site operators, supplied via the Prax Group. Dealers are being held to contracts with Harvest Energy, despite supply being in chaos.

► **Unions call for Lindsey to be saved**

Unions have called on the government to intervene and keep the Lindsey Oil Refinery open, after plans were announced to wind the site down. Workers at the Lindsey oil refinery and members of Unite will stage a demonstration today (July 24) to protest at the plans to wind down production at the site, ahead of a planned closure this autumn.

AUGUST



► **PRA members offered Harvest support**

The PRA wrote to members affected by supply issues with Harvest Energy this week to offer access to specialised legal support. PRA members supplied by Harvest Energy, part of the Prax Group, are facing ongoing supply uncertainty, following the collapse of the Prax Lindsey oil refinery on June 30.

► **Is a fuel duty hike on the cards?**

Petrol and diesel drivers could face a massive shake-up at the pump if the Labour Party government bows to pressure and ends the fuel duty freeze. Campaigners have said the policy “benefited the richest and cost the UK £100bn”. Successive chancellors have steered clear of increasing taxes for motorists for 15 years, but this could be a “no-brainer” for cash-strapped Rachel Reeves, according to economic commentators.

SEPTEMBER



► **Lindsey oil refinery workers rally at Parliament**

Lindsey oil refinery workers rallied outside Parliament in London on September 3, to call for urgent government action to rescue the site. Some 70 protesters gathered, and meetings with MPs, including Melanie Onn, MP for Great Grimsby and Cleethorpes, were held afterwards. Operations have ceased at the Prax-owned Lindsey refinery site on the Humber, which went into administration on June 30.

► **Roadshow success in Bristol**

More than 100 delegates attended the PRA's West of England and Wales roadshow on September 18, with more than 25 companies exhibiting. Attendees at the one-day regional exhibition included a range of PRA members and suppliers, with a delegation from Essar Energy Transition led by CEO at Essar Energy Transition – Retail, Narayan Bhatra.

OCTOBER

► **CMA looks into operating costs**

The Competition and Markets Authority will, for the first time, be scrutinising fuel retailer operating costs for its first annual road fuel monitoring report, which it plans to publish at the end of 2025. The watchdog is currently contacting the petrol retailers who

▷ are taking part in its voluntary price monitoring scheme to request details of developments in operating costs and the impact on margins in the last two years, looking at both supermarket and non-supermarket operators.

► **Fuel Finder reporting to start on February 2**

The Department for Energy Security and Net Zero formally laid its draft Motor Fuel Price (Open Data) Regulations 2025 before Parliament on October 13, setting out its business case for the Fuel Finder scheme. The regulations will establish a statutory framework for the Fuel Finder scheme, which sets out to improve fuel price transparency and increase competition in the petrol retail sector.

► **Fuel Finder concerns**

The PRA will be raising several concerns with Government over the planned Fuel Finder scheme, following the launch of the consultation on the draft guidance of the Competition and Markets Authority's enforcement functions. The PRA is concerned that industry engagement remains critically limited with not all forecourts aware of the "Fuel Finder" and their obligations within it. The PRA has offered to assist with raising awareness of the scheme.

NOVEMBER



► **PRA works with DESNZ on Fuel Finder scheme ahead of 2026 roll out**

The PRA met with the Department for Energy Security and Net Zero (DESNZ) this month to discuss concerns surrounding the upcoming Fuel Finder Scheme. The meeting focused on two key issues: the complexity of registering on-site amenities under the current proposals, and potential penalties for non-compliance under the proposed Motor Fuel Price (Open Data) Regulations 2025, currently before Parliament. DESNZ clarified that any penalties imposed by the Competition

and Markets Authority (CMA) should be proportionate and primarily target incorrect fuel pricing rather than amenity details. A guidance note to this effect will be drafted by the CMA, with the PRA invited to comment before its publication.

► **PRA counts Budget costs**

The PRA has said Autumn Budget proposals, set out on November 26, will heap costs on forecourts and motorists. Chancellor Rachel Reeves announced that fuel duty, which has been frozen since 2011, will be increased in stages, starting from September 2026. From April 2027, fuel duty rates will be increased annually by the RPI measure of inflation. Fuel duty was frozen at 57.95p per litre in 2011, then cut by 5p in 2022 following Russia's invasion of Ukraine. The 5p fuel duty cut will hold until the end of August 2026, with rates then gradually returning to March 2022 levels by March 2027.



MARCH



► **Car wash concerns**

The Car Wash Association (CWA) expressed deep concern after new Home Office figures revealed that fines totalling £2.9m were issued for illegal workers at hand car washes (HCW) in just the third quarter of 2024. However, Brian Madderson, chair of the CWA, said the figures highlighted an entrenched problem: "These figures, while substantial, come as no surprise. For over a decade, major reports have highlighted serious labour abuses within non-compliant HCWs, yet enforcement agencies have done little to eradicate these illegal practices."

JUNE

► **Rogue hand car washes fined millions in 2024**

New Home Office data shows that nearly £10m in fines was levied on unregulated HCW operations for employing illegal workers in 2024. The data shows that civil penalties of £3.08m were issued to 39 HCWs in the final quarter of 2024. This equates to more than £1m a month, bringing the total fines for 2024 up to £8.79m. That compares to total fines of £2.5m for the whole of 2023 as the Home Office ramps up its enforcement activity.

OCTOBER

► **CWA brings sector together at House of Lords**

Leading lights from across the industry, academia and government attended a reception at the House of Lords on October 7, hosted by the Car Wash Association. The event focused on better policing of the UK's non-compliant HCW sector, which now accounts for up to 70% of the total market by sales income. The reception was moderated by Margaret Beels OBE, Director for Labour Market Enforcement.

DECEMBER



► **Hand car wash fines soar**

Fines for employing illegal workers in the HCW sector were a record £3.23m in the second quarter of 2025, the latest government data shows. This brings the total for the year so far to more than £6m. Fines are based on the number of illegal workers employed at a particular site. The latest figures from the Home Office, published on November 28, reveal that in the quarter from April 1 to June 20, 2025, 39 car washes received fines totalling £3.2m. This was an average of £82,820 per business.

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YOUR ADVOCATE

2025 was another fast-moving year in politics, with important changes within the UK and globally and, as ever, the PRA was advocating for its members

In Britain, we observed the first full year of the Labour Government bringing an ideological shift away from manifesto commitments to support economic growth, towards a more traditional party focus on worker rights and expanded welfare, as seen in the Chancellor's second Budget in November.

Meanwhile, across the pond, the first year of the second Trump administration continued to reverse the Biden administration's focus on decarbonisation, with the President cancelling EV targets and subsidies, calling for increased oil production, and sending no attendees to COP30. At the same time, the war in Ukraine has continued, and the prospect of American military intervention in Venezuela means there is continued uncertainty surrounding global oil prices ahead.

In this fast-moving landscape, the PRA has been unmovable in its commitment to represent the interests of its membership, ensuring that your voices are heard in Government and in

the media debate.

Working with Pepper Public Affairs, the PRA has worked steadfastly to build and maintain relationships with civil servants, Government ministers and politicians from all parties. Our efforts have been focused on influencing important policies, bringing attention to

“The PRA continues to be a forceful advocate for petrol retailers across the media, correcting misunderstandings and mischaracterisations regarding the factors influencing the pricing of fuel”



Sir Keir Starmer marked his first full year as PM in July 2025

members' concerns, and securing wins for petrol retailers in the face of new Government initiatives.

GOVERNMENT REPRESENTATION

This year the PRA lobbied against the Government's plans to make inheritance tax more burdensome for family businesses such as forecourt operators, gave input to the Government's Zero-Emissions Vehicle consultation, reported on changes to the Government's plans to phase out petrol and diesel cars under the ZEV Mandate, and called for greater clarity on Net Zero.

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▷ The PRA has also diligently continued to bring attention to the chronic and worsening issues of drive-off fuel theft and shoplifting, supporting the introduction of a new offence for assaulting retail workers, advocating for better access to DVLA data for fuel retailers and cost-recovery agencies, and welcoming the crackdown on the hand car wash crime epidemic, as campaigned for by our sister organisation, the Car Wash Association.

At the same time, the PRA has carefully followed the progress of the Employment Rights Bill, expressing concern about costly measures such as the abolition of the unfair dismissal qualifying period for new workers, upon which the government subsequently reversed course.

Each quarter, the PRA has critiqued the Competition and Markets Authority's (CMA's) Road Fuel Reports, contradicting misinformed commentary from other groups such as the RAC, securing the inclusion of an annex within the CMA's reports explaining issues around rising operating costs impacting retailers, persuading the CMA to better scrutinise operating costs in its annual monitoring report, and continuing to point out errors in the CMA's benchmarking methodology for evaluating current fuel margins.

Ahead of the Budget in November, the PRA made a number of formal recommendations to Government regarding fuel duty, business rates, taxation, energy costs and crime, and has continued to lobby the Treasury since the publication of the Budget on behalf of fuel retailers, including challenging the Chancellor's unhelpful use of language regarding the sector.

FUEL PRICE TRANSPARENCY SCHEME

Throughout the year, the PRA has closely monitored the passage through Parliament of the legislative framework for the statutory open data scheme for fuel prices, known as the Fuel Finder Scheme (FFS). Over the summer, the PRA wrote to the Secretary of State at the Department for Energy Security and Net Zero (DESNZ) securing postponement to the ambiguous proposal for petrol station operators to be obligated under FFS to report "unavailability" of fuel grades, and we have continued to closely scrutinise the appointment of VE3 Global to run the scheme.

Ahead of the FFS regulations coming into force, and the commencement of price reporting obligations, the PRA participated in the CMA's consultation on its enforcement function and fines for non-compliance, ensuring that

"The PRA has closely monitored the passage through Parliament of the legislative framework for the statutory open data scheme for fuel prices aka the Fuel Finder Scheme"

The PRA contributed to the Government's Zero Emission Vehicle consultation

members' concerns and questions were heard, liaising with the developers at VE3 Global, securing meetings with officials at the CMA and DESNZ and setting out concerns with the introduction of the scheme. As the scheme is rolled out, the PRA continues to work closely with Government, advocating for measures that support both consumers and businesses while maintaining stability in the fuel market.

MEDIA REPRESENTATION

The PRA continues to be a forceful advocate for petrol retailers across the media, correcting misunderstandings and mischaracterisations regarding the factors influencing the pricing of fuel. In a media landscape where the most prominent voices do not always belong to the most informed commentators, the PRA actively challenges false narratives, provides evidence and data-backed perspectives to media, and highlights pricing and operational challenges affecting the sector. Media outlets such as the BBC, Sky News, and national newspapers continue to seek the PRA's insights, recognising it as an important voice in the sector.

LOOKING AHEAD

This year promises to be yet another year of changing political and economic challenges. PRA members can count on us to work tirelessly to advocate for policies and measures that protect and advance your interests, ensuring that fuel retailers' voices continue to be heard where decisions are influenced in the press, in Parliament, and in the meeting rooms of Whitehall. ■



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PRA ON THE ROAD

The PRA's Steve Coombe talks us through a very busy 2025

Where on earth did last year go to? It only seemed to me that it was a couple of months ago that I was writing the article for the 2025 *Market Review*! We certainly crammed in our share of events – with five Roadshows, five Business Breakouts and a joint Conference with the ACS.

We opened the year with Business Breakouts at Sandy Park, Exeter and Brands Hatch Circuit in March. In April we hosted the first Roadshow in Knutsford, Cheshire. Then in May another Breakout at the impressive CBS Arena, Coventry, followed by the Scottish Roadshow at Larkhall.

After the summer holidays we were back into the hectic autumn schedule starting in September, with the very popular West of England & Wales Roadshow in Bristol and a North East Breakout in Durham. October saw Gordon and I hop over the Irish Sea for the final Business Breakout in Belfast. Then, on October 16, a new venture for the PRA, our first-ever Roadshow in the South East at the lovely Doubletree Hilton Hotel, Elstree.

In November, we held a joint PRA/ACS Forecourt Conference at the majestic Gaydon Motor Museum. Then we finally brought down the shutters with the traditional last event of the year, at Huddersfield with the Yorkshire Roadshow at the end of the month.

To add some context to the year – all exhibiting and presenting slots were booked before the end of 2024, this is a real testament to highlight how these events are being received by companies.

The delegates at both Roadshows and Breakouts have been fortunate to witness some excellent presentations from both our sponsors and Associate Members.

The most popular subject was the Fuel Finder Scheme and how it will affect retailers. Gordon Balmer (PRA executive director) gave concise presentations which he updated throughout the year to keep the

The PRA's events get more and more popular, with 2025 a record year for attendance



audience informed. He paid particular attention to how much the PRA is involved with the CMA (Competition and Markets Authority) and DESNZ (Department for Energy Security and Net Zero) in assisting them before the scheme starts in early 2026. No doubt this will still be a highly topical subject for this year's programme.

Attendances across the year were up on 2024 figures and that is due to the hard work put in, mostly by Lou Woods with her telephone calls, emails and texts to encourage retailers to attend.

We have also seen some new companies exhibit and, in some cases, present for the first time in 2025 – notably Glory Global, Forward EV, Tates, iSPY and Vapouriz to name just a few.

We are looking forward to 2026 with Roadshows at the regular venues such as Cheshire, Scotland, Bristol and Yorkshire, plus we return to Belfast after missing a year and look forward

to seeing the Irish contingent again.

There is one less Breakout scheduled for 2026 with visits to Exeter, Colchester, Brands Hatch and Durham confirmed.

This year also sees the return of the Forecourt Show at the NEC in April and, as always, we will have a stand and look forward to welcoming all visitors.

As I write this, bookings for exhibiting slots are extremely high with limited spaces available. We have also undertaken a survey from members, and we will be mixing up our presentation slots to give as much varied content on the day.

We will also be looking to change one or two things for 2027 (Yes, we think that far ahead!). We aim to be back in the South East for a Roadshow and maybe switch some venues around, too.

I look forward to seeing you at one of our many events! ■

PRA 2026 EVENTS CALENDAR

ROADSHOWS

- ▶ Thursday, March 12: Cottons Hotel, Knutsford
- ▶ Thursday, May 7: Maldron Hotel, Belfast
- ▶ Thursday, September 17: Radstone Hall, Larkhall
- ▶ Thursday, October 22: Village Hotel, Bristol
- ▶ Thursday, November 26: Cedar Court, Huddersfield

BUSINESS BREAKOUTS

- ▶ Wednesday, February 11: Sandy Park, Exeter (in conjunction with CTC Trading)
- ▶ Thursday, March 5: Colchester United FC, JobServe Community Stadium
- ▶ Wednesday, September 9: Cooper Suite, Brands Hatch Circuit
- ▶ Thursday, October 15: Ramside Hall Hotel, Durham



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Evenlode Roadside offers project management, quantity surveying, procurement and contracting, facilities management and construction health & safety.



FACEWATCH

Facewatch is the UK's leading facial recognition retail security company. Its cloud-based facial recognition system helps safeguard businesses against crime.



FORECOURT EYE

Forecourt Eye has developed a viable and proven solution that delivers high 'loss recovery' results and bottom-line savings to forecourt operators. In addition, it helps with crime reduction, making sites safer for both employees and customers.



FORWARD EV

Forward EV delivers cutting-edge EV charging solutions tailored for forecourt operators. Its innovative business model empowers dealers to take full ownership of the charging infrastructure and retain 100% of the revenue – eliminating the need for leased space or long-term contracts with third-party operators.



FRANCHISEE FIRST

Franchisee First is an innovative provider of fuel bonds as a simple, cost-effective means of meeting a dealer's financial security obligation to their wetstock suppliers.



HENDERSON TECHNOLOGY

Developed for the convenience and fuel forecourt market by Henderson Technology, EDGEPoS is one of the only worldwide epos systems that has been designed by retailers, for retailers.



HH BUSINESS FINANCE

HH Business Finance is a full service business finance company. With over 50 years of experience in offering finance to UK customers, it prides itself on finding the right solutions.



ISPY GROUP

iSpy Group offers tailored vending and coffee solutions that drive extra revenue and enhance the customer experience. With in-house leasing options, flexible terms and full servicing included, the company aims to make it simple to add value to your business.



JACKAMAN INSURANCE SERVICES

Jackaman Insurance Services has expertise in dealing with the petrol retail industry and has bespoke contracts which have been developed for PRA members.



LINDSAYS

Lindsays is a Scottish law firm supporting individuals and businesses with their legal needs. For those in the petrol filling station and convenience retail sector, it offers guidance on legal matters relevant to running and developing your business in Scotland.



MYAUTOMATE

MyAutomate specialises in comprehensive data analysis of fuel stations across the UK, offering detailed insights into ownership, competitor pricing and industry trends.



OIL MARKET JOURNAL

The Oil Market Journal (OMJ), which merged with Fuel Prices Online, provides oil prices, energy news and analysis to European service stations, oil distributors and oil traders. OMJ products enable service stations to take advantage of price movements, allowing them to expand their margins and improve stock management.



PETROASSIST UK

Petroassist UK supplies, installs and maintains a broad range of forecourt equipment including fuel pumps, payment and control solutions, tank gauges and other ancillary equipment.



PETROTEC UK

Petrotec UK focuses on the distribution of fuel dispensers, car wash equipment and fleet management systems, offering a wide range of flexible and custom-made solutions.



REPUBLIC TECHNOLOGIES

Republic Technologies (UK) Limited is a subsidiary of Republic Technologies International, one of the world's largest manufacturers of cigarette rolling papers and filter tips. Brands include Swan, OCB and Zig-Zag.



SALESFORCE

Salesforce empowers companies to connect with their customers in a whole new way through the power of AI + data + CRM.



SRUU

sruu is a retail platform with all the software and integrations you need to bring your epos, supplier, accounts and energy data together. It's a user-friendly platform designed specifically for forecourt and convenience retailers, empowering them to make informed decisions, driving smarter outcomes.



SURESITE GROUP

Suresite Group has been in operation for more than 25 years and offers a complete business solution for forecourt operators across risk management, wetstock management, card services and training.



WINCKWORTH SHERWOOD

A full-service law firm with a diverse client base, Winckworth Sherwood prides itself on providing market-leading advice across a broad range of sectors and markets. Clients include national supermarkets and c-store operators, oil companies and several of the Top 50 independent forecourt retailers.



ZEMPLER BANK

Zempler Bank offers a business current account with 0.5% cashback and low-cost cash deposits. Zempler is a fully regulated UK bank and has been providing financial services for 20 years. It has helped over 650,000 businesses get off the ground.



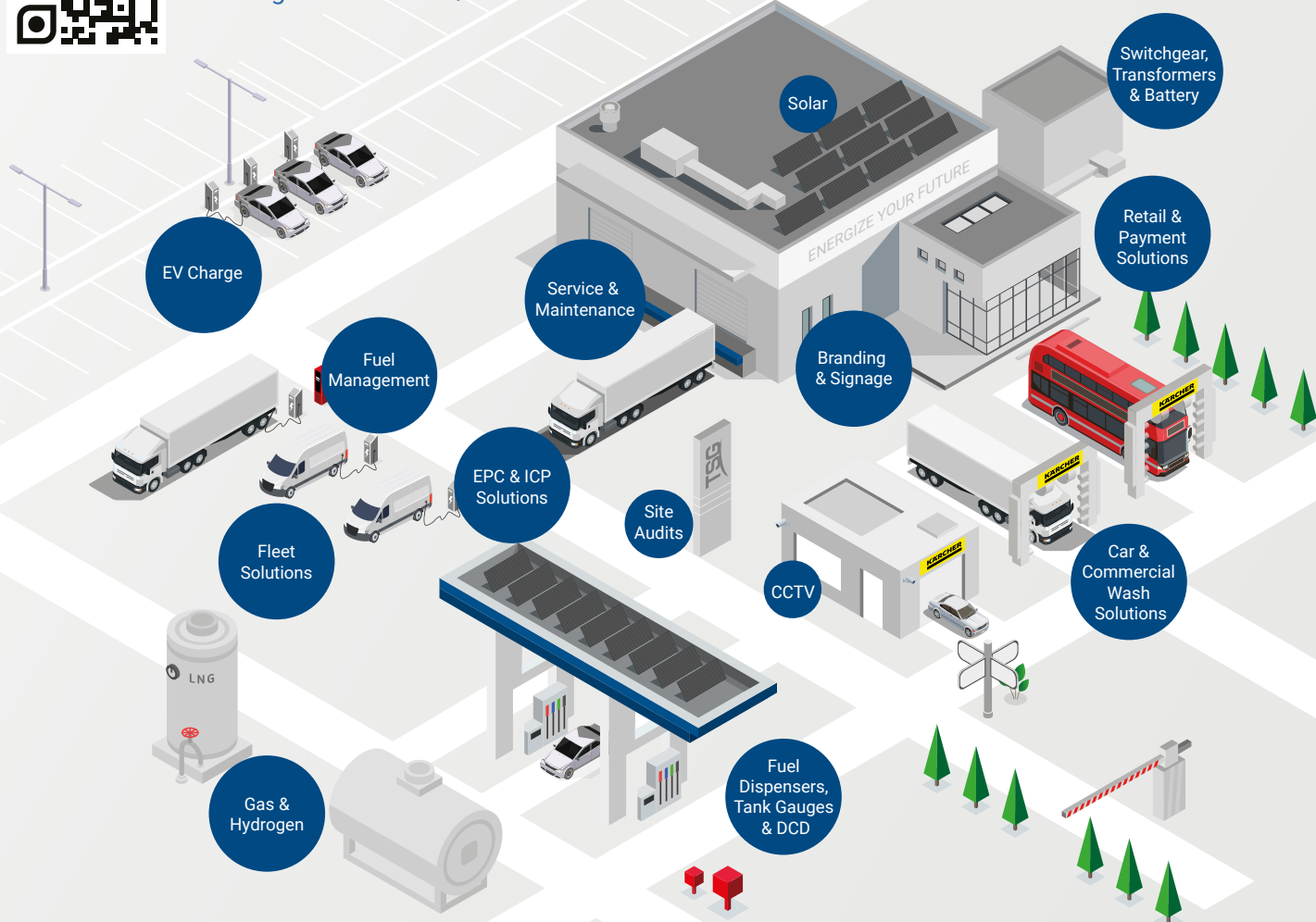
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TECHNICAL HELP

The PRA Technical Team – Phil Monger and Clare Scawthorn – explain the latest technical updates

ACOP

93 Suitable means of communication must be available to enable the tanker driver or site operator to make direct contact with the emergency services. It is the responsibility of both the site operator and the tanker driver to know when and how to contact the emergency services and both should be aware of the procedures to follow. It is the responsibility of the site operator to ensure that the telephone system and pre-set numbers are operational before any delivery.

Guidance

94 The telephone should be a fixed-dial landline (not mobile or battery operated). The phone should have a dedicated line to the emergency services and be preset with the up-to-date numbers of the site operator and the road tanker operator. The phone should be easily available to both the site operator and the tanker driver during deliveries. Its location should be:
(a) clear to both site operator and tanker driver;
(b) in a safe place within the boundaries of the petrol filling station forecourt, where the user will be positioned physically clear of any potential fire involving the road tanker and the potentially wetted area of any spillage

PETEL FOR L133 AND PHONE LINES

With the removal of analogue phone lines across the UK, there has been concern about achieving compliance with ACOP L133, particularly paragraphs 93 and 94 (image, above).

With the mandatory removal, site operators have to look at alternatives with many opting to utilise a voice over internet protocol (VOIP) as an alternative, however, there have been concerns about this not fulfilling the 'landline' element in paragraph 94, especially where a mobile phone may be the proposed alternative.

It is important to remember that it is paragraph 93 which is the ACOP text and 94 is supporting guidance: the requirement is that a means of communication is in place. As technology has improved since the ACOP was republished in 2014 and alternative safe methods may be used, to assist with the concern PELG have created a PETEL guidance document to outline this, which includes three main elements:

- ▶ The site must be able to demonstrate an effective means of communication either via a fixed analogue, digital or mobile technology with emergency numbers preset and readily available should the device lose its memory.

- ▶ The device needs to be in a pre-designated location and available for use (including charged where applicable).

- ▶ Deliveries remain subject to

dynamic and ongoing risk assessment, and consideration should be given to alternative delivery methods should the communications equipment fail.

Following approval by PELG, the PETEL has been published and is

“Site operators have to look at alternatives to analogue, with many opting to utilise VOIP”

available to download for free from the PELG PETEL page on the Energy Institute website.

BEST PRACTICE FOR MANAGEMENT OF UMS SITES

Following the issue of a preventing future deaths report, PELG reviewed the content within the Red Guide to ensure the guidance remained sufficient, and while this was found to be the case, a working group was established with industry to build on the existing framework with a best practice guide on management of UMS (unmanned stations). The document has been drafted and includes the following aspects:

- ▶ set up and alter existing mode of operation to UMS including establishing procedures and credentials for alarm receiving centres
- ▶ agree monitoring provisions, including emergency procedures
- ▶ for management this extends to day-to-day management and checks, auditing processes and contract management with service reviews.
- ▶ There is also a best available technique which provides a non-exhaustive list of suggested elements to monitor and capabilities of the ARC.

The document is currently with PELG to undergo formal consultation with the intention to have the document published as a PETEL in the new year.

IN MEMORIAM: MIKE GARNER

During 2025, we lost one of the PRA's most loyal members, Mike Garner, who was MD of the family-owned, award-winning forecourt mini-chain Garner Group.

Portsmouth-based Mike's involvement and many achievements within the PRA go back to 1993 when he helped form the PRA Wetstock Committee to research the extent of wetstock loss, leading to various research projects.

He was also instrumental in creating the introduction of Standard Temperature Accounting on delivery of fuel to retail sites, and the introduction of Automatic Temperature Compensation on fuel dispensers.

In 2010, the Wetstock Committee morphed into the Technical Committee to ensure a fairer existence for petrol retailers.

Mike took over the Chair and led the

group with some very positive outcomes for PRA members, including production of guidance into the storage and sale of biofuels, production of a comprehensive Training Programme for forecourt staff and exploring options for the use of hydrogen in transport fuel.

Gordon Balmer, PRA executive director, paid this personal tribute: "I'd known Mike for as long as I've worked for the PRA, now 11 years. I found him to be extremely kind, willing and helpful with a deep understanding of how our industry works. Nothing was too much trouble for Mike – he would always pick up the phone and provide exemplary advice on all matters relating to running a forecourt. His wise counsel was instrumental in steering the PRA in the right direction, making it the success it is today."



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We began working with PRA Utilities in 2010, and have called on their services regularly since then to arrange new energy deals for our business.

During the time we have worked together, we have progressively acquired many new sites, and the team at PRA Utilities has been extremely helpful to us in arranging new energy deals for the sites as we took them over.

They offer a full all round service that manages contracts through to implementation with existing and new suppliers. We would be happy to recommend their service to other firms.

Peter O'Connor @ Petrogas



If you would like to discuss your own energy situation with PRA Utilities then please contact us on:
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These collaborations have enabled Murco to craft a unique and tailored 'Added Value' package for each and every dealer on their network.

The Murco Connect partners have also generously extended additional support and margins exclusively for Murco dealers, aimed at augmenting their convenience store offerings and forecourt operations.





Craig Nugent, Murco's director, dealer operations said:

"Over the years, many dealers have frequently asked us for advice on how to maximise the profitable running of their forecourt in areas other than just fuel supply. As the need to generate income from shop, valeting and 'food to go' activities have become more important, we realised that our experience and contacts in these areas could be a powerful aid to our dealers. In addition, being part of Motor Fuel Group brings with it a host of additional benefits supporting the Murco dealer network."



To find out more about what Murco can do for you, call **01727 898890** or email murcodealers@motorfuelgroup.com



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▷ **CHANGES TO FUEL PUMP LABELLING IN NORTHERN IRELAND**

As part of an update to the EU CLP Regulations, a new section has been added to the framework requiring labelling to be added at a fuel pump in line with the requirements in Article 17 – this includes detailing the name and address of supplier of the fuel, nominal quantities, hazard statements, pictograms etc. However, please be advised of the following key points:

► This is EU legislation and as such amends the current EU CLP Regulations for member states only. Following Brexit, Great Britain is no longer a member, and GB CLP is not affected automatically by the changes. Due to the Windsor Protocol, it has been confirmed the regulations will apply in Northern Ireland.

► It has been noted that the labelling requirements laid out in Article 17 of the framework are impractical and costly for industry to implement, without bringing benefits to the protection of human health and the environment. Therefore, steps are being taken to address this, including simplification of certain obligations by removing unnecessary and burdensome labelling requirements.

► Due to this extra work to determine what the labelling



“The PRA is working with HSE Northern Ireland to understand labelling requirements”

requirements will actually be, the time scales for implementing this new system have also been reviewed and policy decisions have been made to delay the original implementation date

Above: PELG is working on a best practice guide for unmanned sites
Below: new regulations on pump labelling apply in Northern Ireland

until January 1, 2028.

The PRA is working with HSE Northern Ireland to understand what the labelling requirements will be, and we will provide updates as soon as this is made available.

For Great Britain, we understand the HSE is looking into the matter and has consulted on its chemicals legislative reform proposals during the summer, however in reference to labelling the following wording was included in the consultation: Derogations to the labelling requirements of EU CLP are introduced for chemicals supplied without packaging (such as fuel at filling stations). Therefore, at this time we do not expect any changes to be implemented in Great Britain in regard to the labelling of fuel at filling stations, if that position changes we will communicate this to operators at the first opportunity.

NATIONAL GRID DEMAND STUDY

In the autumn, the PRA was approached by the National Grid as part of an exercise being undertaken to understand the potential demand required from site operators installing electric vehicle charging equipment. If any operators would like to take part in the exercise, please reach out to Phil and Clare to discuss. ■





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What exactly is the Big Bertha and how is it different to your other machines?

It’s a uniquely modular roll-over concept for top-end requirements:

- Combination of fully featured touchless wash system with brush wash
- High-end drying system either for top quality results or particularly fast processes
- Very fast cycle times if needed (wash + dry from ca. 3 minutes)

Offering a comprehensive, multi-dimensional wash experience, it features high-pressure water, oscillating nozzles, a 4D wheel cleaning system, advanced cleaning agents and complete drying via an angled 60° drying hood.

Beyond its core cleaning capabilities, the Big Bertha incorporates multiple enhancements over conventional car washes, including ambient and functional lighting,

advanced safety features and an intuitive water management system, delivering superior wash quality while promoting responsible water usage.

How much space does it take up?

Wash bay size for the Big Bertha on this site is 12m long, 4.4m wide and 3.6m high

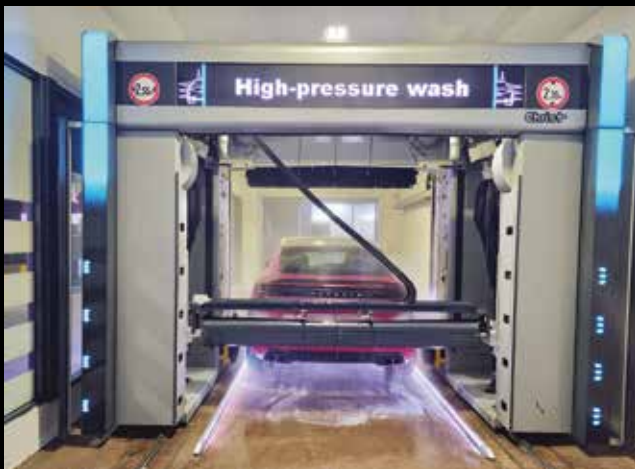
How much does it cost?

All depends on the specification the customer would like to build, the machine within the UK now was around £200k which is one of the highest specifications available.

Does it have any environmentally friendly features?

Christ Direct drive saves about 10% of energy on the brush drive

- Very fast washing = lower water and power consumption, lower chemical consumption.



- Water recycling rate up to 90%
- Designed with a long product lifetime in mind; recyclable materials (e.g. metal covers replaced plastic from previous models)
- Spare parts supply guaranteed for 10 years

How are car wash sales going generally?

Car washing is extremely busy at the moment, we generally are installing a minimum of three machines a week.

What do forecourts want - jet wash or car wash or both?

We are seeing a new trend moving more towards wash parks, many sites are now looking to offer both rollover units and self service units to accommodate different types of customers.

Which are your best selling models this year?

Our main models we sell are the Cadis and Alpha.

Any advice for anyone choose a new wash system?

Wilcomatic advises customers to prioritize efficiency, reliability and being provided a tailored solution when buying a new wash system. Choosing equipment that suits your business type, maximizes throughput and ensures a superior clean. We also note that uptime of the equipment is extremely important when choosing a new wash system provider, with that said Wilcomatic has a service team three times larger than any other wash provider so you can count on us to keep you washing.



Find out more about Wilcomatic's comprehensive range of self service vehicle wash systems at: www.wilcomatic.co.uk or send an email to sales@wilcomatic.co.uk



ADAPT TO SURVIVE

Alexander Russell, director of strategy at the Car Wash Association, on mitigating the threat of drought to the car wash industry



After the hottest summer on record, many readers will have seen the reports about the predicted droughts and subsequent hosepipe bans in some regions of the UK that may eventually threaten to close car washes temporarily just as the peak of the car washing season approaches.

This is because a “blocking” weather system that lingered high above the UK earlier this year resulted in one of the driest, warmest and brightest springs on record. England experienced the driest March, April and May since 1893 followed by the summer months of June and July also being the hottest on record for the UK, with rainfall only 79% of the long-term average. Luckily September,

October and November have turned out to be wet months overall, with a succession of low-pressure systems bringing widespread rain, especially in October.

As dry soils in catchments are slowly replenished by autumn rainfall, we have seen storage levels in most public water supply reservoirs gradually begin to increase. However, total reservoir stocks across England for the period ending in the first week in November were only 65.8%, which is still significantly below the 77.4% average for this time of year.

TEMPORARY USE BANS

Sussex and parts of Kent are supplied by the South East Water company, whose

Ardingly Reservoir is still only 32.58% full, and have had a narrow escape. On October 24, the company applied for a non-essential use ban drought order to restrict use by some businesses.

Temporary Use Bans (TUBs) by Yorkshire Water and parts of Thames, Southern and South East Water are expected to be in place well into the winter, until the situation with their water resources improves significantly. However, Southern Water has lifted its TUB previously in effect in its Hampshire and Isle of Wight supply areas, from October 31, thanks to some welcome rainfall.

The Met Office is currently predicting a high likelihood of drier than usual conditions from November to January 2026, despite recent wet weather.

“We’re going to have intense rainfall, perhaps in those kinds of patterns more often and climate change seems to be doing that to us, but also very dry baseline summers and springs,” said a spokesman.

“What we need is sustained normal average wet winter rainfall and that should see us OK,” he added.

“If we don’t get that and we continue to have dry weather, then we will have a shortage of water and that will have impacts next year.”

“The Met Office is currently predicting a high likelihood of drier than usual conditions from November to January 2026”

The future of car washing – today.

WashTec is the global market leader in vehicle wash solutions, trusted by operators in over 80 countries. From compact jet wash systems to high-throughput tunnels, from state-of-the-art rollover machines to heavy-duty commercial vehicle washes, we cover every segment of the market with unmatched expertise.

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- **Adaptive brush movement** and high-pressure jet systems that follow the vehicle contour for better coverage and shorter wash times.
- **Smart dosing** that optimises water and chemical use programme-by-programme – also reducing operational cost.
- **Timeless aesthetics** - with **personalisation options** for your brand
- **Full digital connectivity** into our mywashtec.com platform for remote monitoring, data insights and configuration. Customers can even build their own wash programmes and change pricing from the platform.
- **Integration** with our digital tools and apps such as EasyCarWash (for subscriptions and bundles)

Conveyor tunnel systems

The WashTec conveyor tunnel system is more than the sum of its parts – it's a precise interplay of technology, chemistry, control and service. WashTec combines all these elements into a high-performance overall system. With modular system options, smart control and reliable service, we provide the ideal basis for an efficient, future-proof washing business.

Self-service jet washes

At WashTec, we understand that self-service wash bays are more than just a place to clean vehicles — they're spaces where customers enjoy caring for their car their way. Whether it's a quick rinse or a full foam treatment, every WashTec system is designed to deliver a satisfying, high-quality wash experience.

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- **Future-ready configuration**, allowing upgrades to programmes, payment methods and chemistry
- **High-impact LED architecture** increases forecourt visibility and drives impulse usage
- **Modern, premium aesthetics** that enhance overall site perception and brand value

“The CWA argued with suppliers that by allowing responsible car washes to remain open until water resources could no longer support them would discourage covert car washing at home”

FRAGILE SITUATION

Droughts are usually multi-year events. While much of England went into drought this summer, with hosepipe bans across large swathes of the country, things were not as bad as they could have been because it had been a rainy autumn and winter the year before. This meant reservoirs were full and that groundwater – storage of water under the soil – was charged up.

But months of record dry weather meant a lot of that water was used, and it has not been replaced, despite roughly average September and October rainfall.

Groundwater takes significantly longer than reservoirs to recharge, and the situation in England is still fragile despite recent rainfall.

Alastair Chisholm, the director of policy and external affairs at the Chartered Institution of Water and Environmental Management, said: “In UK drought management terms, a second dry winter is when things start to get serious. So Met Office warnings of increased risk of dry spells through an important time of year for recharge of our water resources will ring alarm bells. This, coupled with dry weather next spring and summer will mean more drought orders – more abstraction from rivers when they’re at low levels, more hosepipe bans and likely restrictions on some business water use.”

England has a lack of water resilience, with a growing population, higher risks of hot, dry summers and the fact no new major reservoir has been built in more than 30 years. This means that the country is reliant on consistent rainfall to keep taps running, and when we do not

get it, rivers have to be sucked dry and hosepipe bans imposed.

WATERLESS WASHING

The CWA has been acting on this information and taking steps to enable car wash owners to continue operations for as long as possible. We have been in contact, for example, with South East Water, one of the UK’s most hard-pressed water suppliers, to make the case that as water-dependent businesses, car wash operators are adapting their business models to minimise water consumption so as to put less pressure on the grid. This is being achieved by a number of measures to reduce consumption, including recycling equipment that reuses up to 85% of the wash water, investments in boreholes and even waterless washing.

In the absence of water recycling, usage can also be reduced by 20-25% by fixing any leaks, minimising pre-washing and reducing the pressure of jet washes, all of which can help to save between 40-70 litres per wash.

We have emphasised to the suppliers that these are voluntary measures being taken by responsible business water consumers and informed by experience of previous droughts, extensive research and input from our members.

We have also stressed with the water companies that unless such careful consumers are treated more leniently than non-recycling operations in the

event of a progressive ban, this would deter such businesses from investing in this equipment in the future.

Furthermore, these measures should be implemented on a regional basis according to need, as previous experience has shown that not all regions of the UK have been similarly affected by water shortages.

In previous droughts we have also sought agreement with water authorities on the display of approved signage that identifies operators that are compliant with these measures. This is intended to avoid any unfair misunderstandings by members of the public wrongly assuming that operators may be flouting a ban.

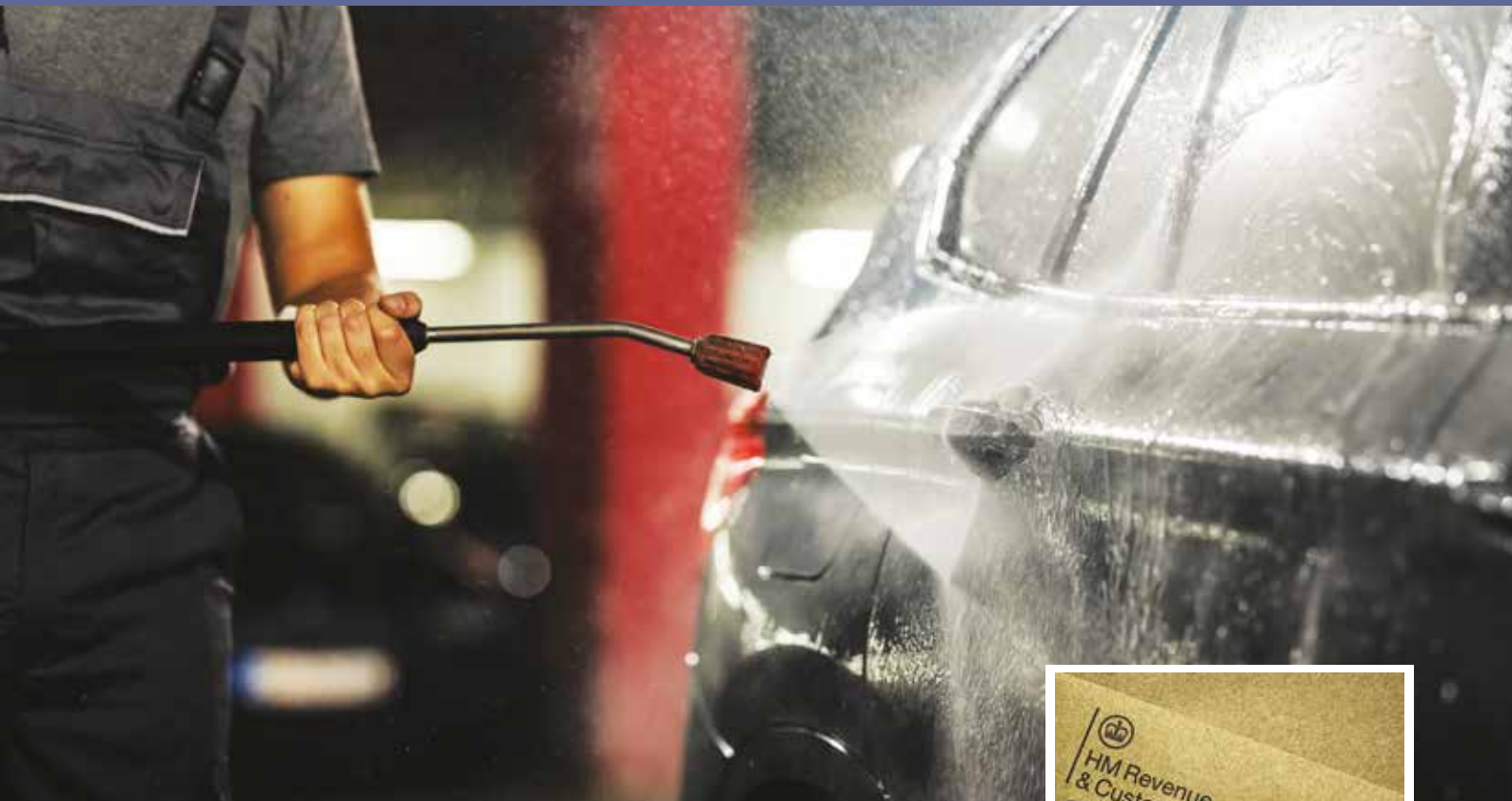
We have also argued that by allowing responsible car washes to remain open until water resources could no longer support them would discourage covert car washing at home while also promoting road safety in the event of winter salt and dirt obscuring vision through car windscreens.

South East Water, for example, readily confirmed that it would take account of and ‘make allowances’ for such business users. It also confirmed that there would be no restrictions on private tankering of water by car wash operators from neighbouring districts with sufficient reserves.

However, no new boreholes would be authorised as aquifers are already at capacity and the hosepipe ban would remain in force. ■

Hosepipe bans have been enforced across parts of the UK





SHINING A LIGHT ON THE SHADOW ECONOMY

Nottingham Trent University (NTU) researchers welcome government plans for a new shadow economy team with an initial focus on the hand car wash industry

As a sector which is regularly held up as an example of the shadow economy in the UK, hand car washes will now receive special attention through a new shadow economy team that will operate in the new Fair Work Agency (FWA).

Since NTU began its focus on good work back in 2019, we have been exploring this type of work and business sector, trying to shine a light on poor and unlawful practice from business owners, managers and regulators through our Work, Information and Place Research Centre.

We began by understanding the size and shape of key sectors and working with regulators, enforcement agencies and local authorities to understand more about them and how we might improve the sectors we focus on.

Since providing the first confirmed estimate of the hand car wash sector (about 5,000 businesses and perhaps 40,000 workers) we've moved on to

explore how these sectors continue to operate on our main roads and in our petrol station forecourts despite many years of attention by agencies like the Police, GLAA and Office for Labour Market Enforcement alongside connecting with sector partnerships such as the Car Wash Association.

Our research highlights that many businesses operate within a different set of organisational norms with little concern for failing to comply with the laws and regulations they should be following. With a focus purely on business growth, these sectoral pockets of non-compliance can be left in the shadows, but the current government's renewed focus on work has helped to rekindle a multi-partner approach to this issue.

ALTERNATIVE FORMS OF REGISTRATION

NTU has been involved in a set of projects exploring licensing and

NTU research found that many hand car wash businesses have little concern about failing to comply with laws and regulations, including paying tax

alternative forms of regulation, which led us to the House of Lords this autumn – hosted by the Car Wash Association – to showcase new approaches that could be adopted. We've used data science, APIs (Application Programming Interfaces) and technologically enabled transparency to challenge poor and unlawful practices, and with partners have been finding new ways to tackle the shadow economy.

Together, we are looking to ensure the new Fair Work Agency has the tools and the insights to tackle unlawful practice and ensure businesses operate on a fair and level playing field. This partnership approach developed alongside the GLAA, a franchise operator and the Car Wash Association has helped to build the case for the shadow economy team, and we look forward to working alongside it as it takes its place within the FWA.

Our research also tells us that we need a mandatory licence scheme for



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TOP DOWN:
Ian Clark, Dr James
Hunter, Rich Pickford

serially non-compliant and unlawful activity in the hand car wash sector. The issues at play are too well embedded to be changed by competition and voluntary schemes alone and we also welcome the additional news about the creation of an abusive Phoenixism Taskforce within the Chancellors Budget.

The Insolvency Service will receive an extra £25m over the next five years to help it tackle rogue directors. The new Abusive Phoenixism Taskforce will be staffed by 50 people investigating suspicious company insolvencies.

By bringing transparency to business ownership, tax compliance, payroll information and business rates, we aim to enhance regulators' and enforcement agencies' abilities to ensure better business practices across the whole sector, allowing them to focus on serial non-offenders and those with links to serious organised crime and human trafficking.

A scheme which records these business details is the first step. In a sector where wage theft is endemic, we need to provide a clearer market segmentation to allow limited resources to focus on highest need. At present, all hand car washes need attention, so regulators, police and local authorities have no easy way to target their enforcement work.

The current fragmented regulatory environment also makes it easy to hide in plain sight, reducing our ability to collect the required taxation, ensure businesses are insured and that workers and consumers are protected from malpractice.

Our hope is that the new FWA and the shadow economy team will play a key role in the drive to improve this sector and others like it. A fresh look at this issue is needed, and a data-enriched and tech-enabled well-supported FWA will play a critical role in this mission. ■

AUTHORS:

Rich Pickford, Head of the Nottingham Civic Exchange; Dr James Hunter, Principal Lecturer in Public Policy, School of Social Sciences; and Ian Clark, Emeritus Professor of Work and Employment, Nottingham Business School

ABOUT NOTTINGHAM CIVIC EXCHANGE:

Nottingham Civic Exchange has been established by Nottingham Trent University to maximise research, policy and practical impact by bringing together university expertise with partners seeking to address the needs of communities. Nottingham Civic Exchange acts as a resource to look at social and economic issues in new ways. This means facilitating debate, acting as a bridge between research and policy debates, and developing practical projects at a local, city and regional level.

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MYAUTOMATE FUEL RETAILER DATABASE

This report provides a comprehensive summary of the data owned and maintained by myAutomate

The team at myAutomate brings over 60 years of combined UK fuel industry expertise across retail, supply, fuel cards, marketing, and technology. Since launching in 2019, the company has focused on delivering actionable fuel data, customer insights, and digital tools for businesses and motorists. The business expanded its capabilities with the acquisition of PetrolPrices in 2021, the management of Fuelsense Competitor Data following Experian's Catalist exit of the market in 2024, and the acquisition of Portland Pricing in January 2025. These strategic moves strengthen myAutomate's end-to-end insight across the fuel market, from wholesale to pump prices and consumer behaviour.

NOTE:

*The canopy as a consumer would recognise it

**Asda includes Asda on the Move and Asda Express

***Includes any remaining Applegreen and Low Price Always-branded sites

Canopy brand*	Number of sites 2025	Number of sites 2024	Difference	% Change
ASDA**	484	455	29	6%
BP	1,170	1,153	17	1%
CIRCLE K	46	45	1	2%
CO-OP	23	26	-3	-13%
COSTCO	20	20	0	0%
EG ON THE MOVE***	146	11	135	76%
EMO	19	21	-2	-4%
ESSAR	57	59	-2	-4%
ESSO	1,392	1,265	127	9%
GLEANER	47	47	0	0%
GO	39	34	5	13%
GULF	371	383	-12	-3%
HARVEST	58	62	-4	-7%
HIGHLAND	20	18	2	10%
JET	331	319	12	4%
MAXOL	102	101	1	1%
MINOR BRAND/UNBRANDED	678	698	20	-3%
MORRISONS	340	340	0	0%
MURCO	179	171	8	4%
NICHOLL	22	17	5	23%
PACE	99	107	-8	-8%
RIX	11	12	-1	-9%
SAINSBURY'S	316	315	1	0%
SCOTTISH FUELS	18	18	0	0%
SHELL	999	1,184	-185	-19%
SOLO	64	61	3	5%
TESCO	514	513	1	0%
TEXACO	605	663	-58	-9%
TOTAL ENERGIES	53	41	12	23%
VALERO	99	26	73	74%
WELCOME BREAK	34	30	4	12%
TOTAL	8,356	8,329	+27	



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KEY MARKET INSIGHTS FOR 2025

Analysis of year-on-year data highlights several shifts across the UK forecourt sector:

- ▶ Shell recorded the largest net decline of any brand, losing 185 sites and dropping from 1,184 in 2024 to 999 in 2025, a 19% contraction. Much of this reduction stems from changes within the MFG estate. Shell is now the only oil company brand in the table with less than 1,000 sites.
- ▶ Valero saw one of the strongest growth rates in the market, increasing its branded sites by 74% year-on-year, making it one of the fastest-expanding brands in 2025, just short of tipping 100 sites at the time of the report. However, the vast majority of sites joining Valero are moving from Valero's licensed Texaco estate.
- ▶ SGN strengthened its position among the Top 50 Indies, completing two major acquisitions, including the Rusede estate last month, following an earlier purchase of nine sites at the start of 2025.
- ▶ EG On The Move advanced its UK repositioning strategy, having acquired the Applegreen UK network in January, and phased out the Applegreen and Low Price Always branding during 2025.

The UK petrol station market continues to evolve, with consolidation among major players and increasing demand for data-driven insights. With two decades of expertise and a robust, ever-evolving dataset, myAutomate stands at the forefront of fuel industry analysis.

Region	2025	2024	Difference
SOUTH EAST ENGLAND	1,073	1,072	1
LONDON	520	523	3
EAST OF ENGLAND	773	770	3
WEST MIDLANDS	728	724	4
EAST MIDLANDS	494	491	3
YORKSHIRE AND THE HUMBER	797	792	5
NORTH WEST ENGLAND	868	865	3
SOUTH WEST ENGLAND	808	805	3
WALES	537	538	1
SCOTLAND	849	849	
NORTHERN IRELAND	597	581	16
NORTH EAST ENGLAND	312	319	7
TOTAL	8,356	8,329	

Category	2025	2024	Difference
COMPANY	1,233	1,247	14
DEALER	5,632	5,587	45
SUPERMARKET	1,491	1,495	4
TOTAL	8,356	8,329	

NOTE:

Company = Owned by the supplying oil company whose brand appears on the canopy

Dealer = An independently owned site usually supplied under an agreement with an oil company whose brand usually appears on the canopy. Also includes unbranded sites with no oil company brand association.

Supermarket = The canopy brand is one of the top four supermarkets where a fuel station is supported by a supermarket store nearby. Including, Asda, Morrisons, Sainsbury's, Tesco but not including Costco, Co-op, Asda Express or Asda on the Move.

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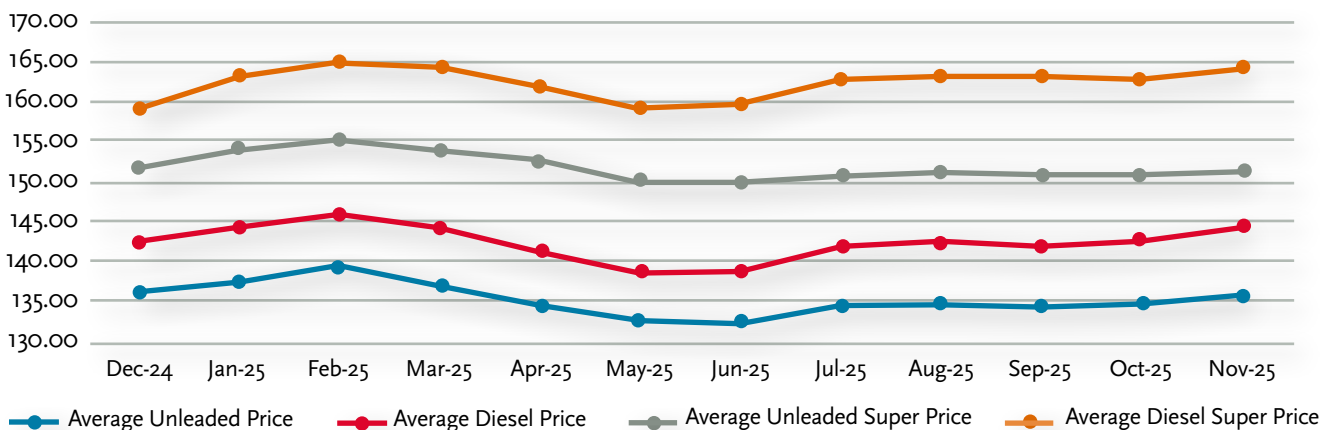
PRICING INSIGHT

This report provides a summary of fuel data over a 12-month period from December '24 – November '25 from stations participating in the voluntary and temporary CMA road fuel price open data scheme.

Average fuel prices across all grades rose in early 2025, peaking around February, before steadily declining into May–June. Prices then stabilised over the summer and edged up again towards November. Diesel and diesel super remained the highest-priced fuels throughout, while unleaded saw the lowest overall volatility.

Date	Average Unleaded Price	Average Diesel Price	Average Unleaded Super Price	Average Diesel Super Price
Dec 24	142.50	142.50	151.60	159.40
Jan 25	137.60	144.30	154.00	163.30
Feb 25	139.40	146.50	155.30	165.00
Mar 25	137.00	144.20	154.10	164.10
Apr 25	134.70	141.40	152.60	162.30
Jun 25	132.60	138.80	150.20	159.10
Jul 25	134.50	142.00	150.70	163.10
Aug 25	134.80	142.60	151.10	163.30
Sep 25	134.40	142.10	150.70	162.90
Oct 25	134.90	142.60	150.70	163.10
Nov 25	135.70	144.20	151.40	164.00

AVERAGE FUEL PRICES DEC 24 - NOV 25



If you have any questions about this data please contact Clare Lafferty
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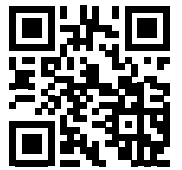
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Michael Gilson, Londis Garswood Filing Station

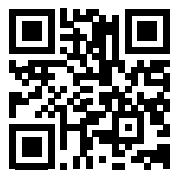


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- Innovative Customer Journey/ Store Format
- Bigger group, exclusive NPD, access to Tobacco Club delivering higher margins
- Over 190 EDLP deals including Milk & Bread
- Fantastic promotional package with over 100 offers every 4 weeks, including cross the road WOW and Mega deals
- Great margin boosting wholesale deals



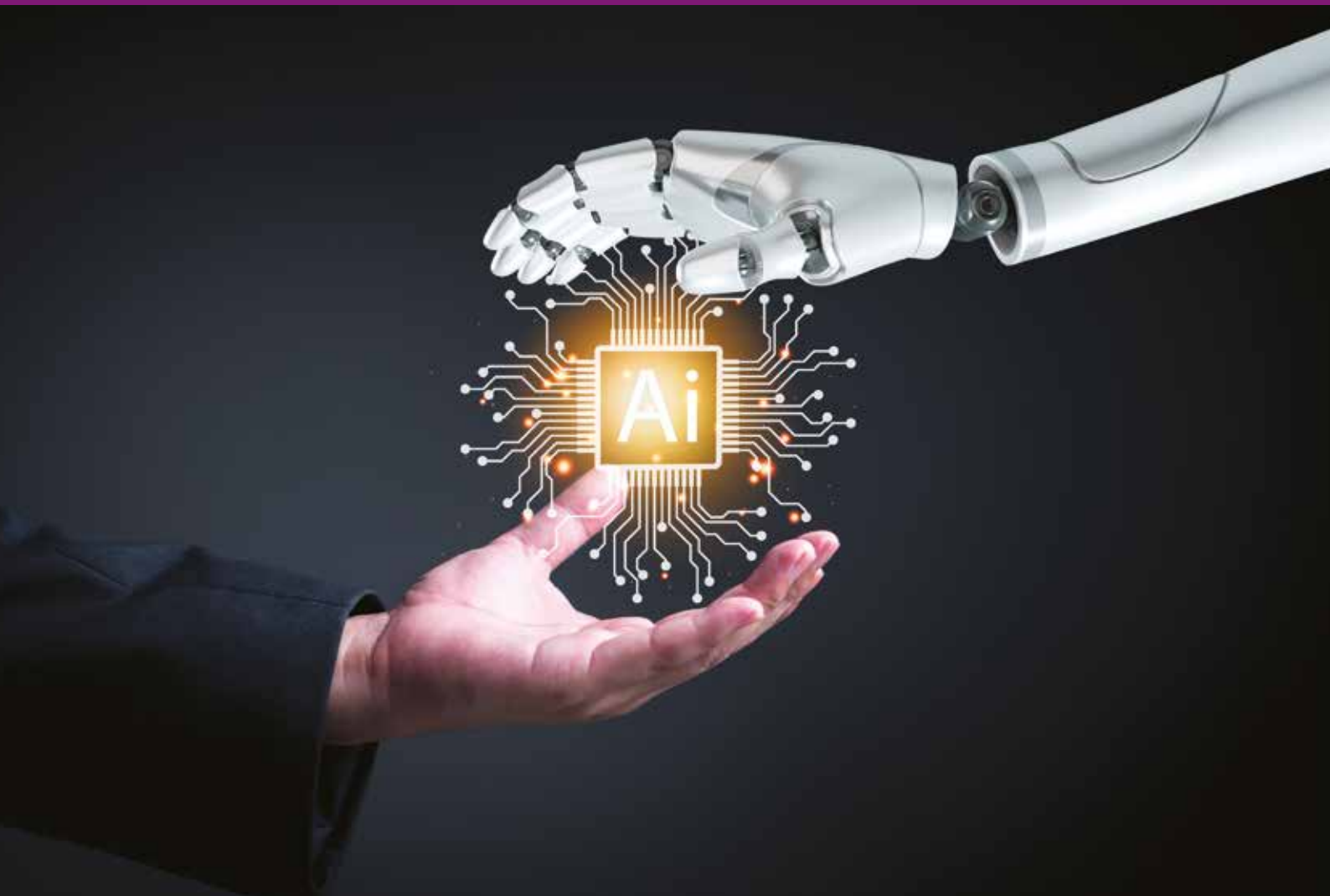
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FUELLING SMARTER BUSINESS

Accenture’s Rushad Chinoy explores how artificial intelligence (AI) is redefining customer engagement, efficiency and growth for global fuels and convenience retailers

The most forward-looking retailers aren’t experimenting with AI any more, they’re operationalising it. Across the fuels and convenience ecosystem, AI is no longer a futuristic concept. It’s here, quietly powering transformation in how retailers engage customers, run operations and unlock new value.

What began as experimentation with generative AI has matured into enterprise scale adoption for some companies, ushering in a new era of agentic AI: autonomous digital agents that collaborate to solve business problems in real time.

A recent Accenture study found

that 98% of fuels and convenience executives expect foundation models to play a central role in their business strategies within five years. That expectation is starting to become reality as industry leaders turn insight into action, build trust in the technology and translate early experiments into measurable outcomes.

FROM GENERATIVE TO AGENTIC: THE NEXT LEAP

In this new phase, AI doesn’t just analyse data, it acts on it. Picture a network of digital agents that can research priority fleet customers, build personalised campaigns in minutes,

negotiate optimal pricing and support staff in real time.

This is no longer theoretical. One global retailer recently integrated OpenAI’s latest models into a secured environment to create a private AI assistant that supports store operations. Within weeks, ticket resolution times dropped, employees spent less time searching for answers, and insights that once took days surfaced instantly.

CREATING TANGIBLE VALUE ACROSS THE NETWORK

The most forward-thinking retailers aren’t chasing novelty, they’re building value. Three areas are delivering the greatest returns: customer engagement, operational efficiency and innovation speed.

According to Accenture analysis, AI and analytics could unlock up to \$150bn in trapped value globally across downstream energy retail by 2030, driven by operational efficiencies, optimised pricing and improved

customer engagement.

For example, a leading global fuels and convenience retailer is using AI to monitor transactions across more than 13,000 sites, predicting pump failures before they occur. And in Asia, a leading Malaysian fuels and convenience retailer is embedding predictive AI into logistics and fleet operations to improve uptime, streamline processes, and boost profitability.

AI doesn't just cut costs. It builds resilience, strengthens operational continuity and creates new pathways for growth across the entire retail network.

PERSONALISATION FOR EVERY CUSTOMER, EVEN NEW ONES

AI's greatest potential lies in personalisation, especially for customers who've never swiped or scanned a loyalty card.

In Latin America, one leading fuels and convenience retailer is piloting AI-driven personalisation for "unknown" customers across more than 500 sites. By combining camera-based vehicle recognition, local weather and demand data, the system predicts likely purchase behaviours and creates tailored offers. The initiative is looking to drive a 12-15% uplift in pump-to-store conversion and higher basket value.

BEHIND THE SCENES: EFFICIENCY AT SCALE

Some of AI's most transformative work happens behind the scenes. At a major North American fuel retailer, generative

AI analysed over 4,500 customer service calls in under 15 minutes, reducing average handling time by 15%, cutting supervisor load by 30% and improving satisfaction scores by 3%.

Meanwhile, leading retailers around the world are embedding AI into pricing, logistics and workforce optimisation, automating routine tasks while freeing teams to focus on customer value.

AI is not tomorrow's opportunity. It's today's competitive advantage

BUILDING AN AI-READY CULTURE

Technology is only half the story. True transformation depends on people. Industry leaders are investing in gen AI academies to build the skills, confidence and ethical grounding needed to drive long-term value. One global retailer trained 75 senior leaders and more than 1,000 employees in just three months, shifting the mindset from "Can we?" to "We'll never go back."

But this is only the beginning. The next wave of AI-ready culture will be defined by continuous learning, embedded change and frontline empowerment. Retailers will design roles around human and AI collaboration, not replacement. The future of convenience is not only digital, but also intelligent.

THE HUMAN DYNAMIC: TECHNOLOGY WITH EMPATHY

Across the organisation, employees are beginning to work alongside intelligent tools that sharpen decision-making, accelerate problem-solving, and elevate the empathy they bring to customers through richer, more predictive data. As automation scales, the retailers that thrive will be those that cultivate curiosity, accountability and responsible experimentation.

As this shift takes hold, human value becomes more important, not less. Store associates become brand ambassadors equipped with real-time insights, contact-centre teams use AI co-pilots to focus on empathy and complex issues, and analysts move from reporting to storytelling as AI handles the heavy lifting.

READY FOR REINVENTION?

AI is not tomorrow's opportunity, it's today's competitive advantage. The difference between leaders and laggards lies in execution: who experiments, who scales and who reimagine.

For fuels and convenience retailers, the path forward is clear. It starts with connecting data across the enterprise to unlock real-time intelligence, then moving decisively beyond pilots into deployments that scale and deliver measurable value.

Equally important is empowering employees to co-create with AI so human expertise becomes more effective, not less. And as customer expectations continue to rise, retailers must use AI to deliver experiences that feel personal, relevant and consistent at every touchpoint.

Those who act now won't just keep pace with the industry's future – they'll define it. ■




● **ABOUT THE AUTHOR**
Rushad Chinoy is a Principal Director in Accenture's Global Energy practice and part of the Fuels Retail & Convenience leadership team. With over 20 years' experience in strategy and transformation, he advises global clients on unlocking value at the intersection of customer, data, and technology.

*All opinions in this article are my own and not necessarily the views of my employer.

The question on everyone's mind is what does the future hold for traditional and alternative fuels, and hence the ongoing viability of retail sites. By now, most will be well versed in the global need to find more sustainable options for all parts of society, including road transport. The reality is now dawning on all industry sectors (and perhaps one day, governments too) that achieving net zero is going to be extremely difficult.

Hydrocarbons have enabled modern life for the past few centuries since the industrial revolution, and oil-based fuels and petrochemicals for the past hundred years or so. The existing infrastructure, at colossal scale, has taken significant time to develop, and used a lot of natural resource to do so. Replacing this infrastructure in an economically sustainable manner will inevitably take a very prolonged effort.

The current reality is that oil demand continues to rise globally, with

predictions of peak demand occurring in the early 2030s. Wet fuels are used to power all forms of transport, including road, aviation, marine and construction vehicles. All industry sectors have been making investigations into possible sustainable fuels, considering practicality, affordability and scalability. Theoretical options exist, but the scale of the challenge is huge.

There are estimated to be over 1.6 billion vehicles globally, with roughly 90 million new vehicles produced each year. China currently registers around one-third of new vehicles at a rate of 30 million pa. The EU registers around 18 million. The largest auto maker globally is Toyota with around 10 million sales p/a. In 2024, only around 17 million (less than 20%) of these new vehicles globally were "alternative fuel" (less than 1% of the global vehicle total). The gap to achieving "net zero" gets bigger each year.

Across the water in mainland

Europe, plug-in vehicles (predominantly cars) account for just under 25% of new sales, and hybrids a further 34%, with most traction occurring in nearby countries such as Germany and the Benelux. Like in the UK, the overall proportion of alternative fuel vehicles continues to grow slowly, year by year.

The reality of net zero road transport is that it will take a number of decades (not just months or a few years) to dominate the overall car park, but it is gradually happening (at least for cars) in these early stages of the transition.

OPTIONS FOR ALTERNATIVE FUELS

As well as the growth of plug-ins, there are other possible technical solutions. These include "cleaner" wet fuels which could make use of at least some of the existing infrastructure, such as biofuels like E10, drop-in replacements for diesel like HVO or other synthetic fuels like those now being used by Formula One racing. Then there's liqui-gaseous options such as LNG, CNG, methanol, ethanol and hydrogen; all of which offer potentially high energy densities. These may become especially important for heavier duty needs, such as HGVs, aviation, marine and construction, but progress to date is limited.

The argument often made about these alternate "wet" fuels is that they are hard to scale, but the same argument could be made about the ability to scale the electric grid – how

AN ALTERNATIVE APPROACH

Philip Reese, Director of Evenlode Roadside, specialists in managing roadside assets, discusses demand for alternative fuels including EV charging



Edison

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long this could take in the real world and in a way that retains sufficient resilience against failure or blackout.

Given the very long timelines at play, and the significant economic challenges to achieving a transition (including stagnant economies, rising borrowing costs, fiscal policy challenges, political instability, the affordability of incentives, voter pressure and competition for scarce resources), it would be wise to assume all options for alternative fuels remain on the table in the long run.

THE RISE OF EV AND HYBRID

In the immediate term in the UK, EVs are the current policy focus, with hybrids offering a more palatable stepping stone for many, with familiarity of use as well as what is on offer in showrooms as of the end of 2025, key factors.

Early uptake has been heavily influenced by the incentives offered, such as benefit in kind with new sales being dominated by fleets. Private demand has risen only very slowly to date, and the much larger used-car market is only slowly beginning to show signs of growth.

The choice of vehicle is influenced by the use case. The majority of journeys are below 10 miles, and so lend themselves to electric power, where economical home charging is feasible. But home charging is not an option for everyone. For longer journeys, this influences the preference for fuel type.

EVs made up just under 25% of new vehicle sales in 2025, and whatever the timing of the ZEV mandate (2030 or 2035), it is going to take a number of decades for the balance of vehicles

All options for alternative fuels remain on the table

on the UK's roads to change, and with it where drivers obtain their fuel. The rise of hybrids will mean a gradual change in wet fuel sales (on a per vehicle basis). EVs will likely be charged at home or destination, with en route re-fuelling becoming the supplementary option, rather than the norm.

The experiences of early EV adopters identifies mixed reliability of en route charging. Some charge point providers (including PFS operators) are now addressing this. Reliable and convenient charging facilities with good amenities could be a differentiator for the capable operator and will gradually encourage those making longer journeys to switch to electric, but the overall demand of en route fuel is predicted to decline over time as a proportion. Roadside consumer habits could therefore be expected to alter over time, presenting both the challenge and opportunity to evolve the retail offer, bespoke to demand.

HOW BIG IS THE OPPORTUNITY FOR PFS RETAILERS?

Any decision to offer alternative fuels in the short- or medium-term needs to be weighed in terms of both readiness for the “net zero” future, and the ability to derive short-term margin. But site-specific demand will vary by site type, location, demographics and situation.

It is for this reason that Evenlode draws on the extensive low carbon

transport expertise that Cenex provides, creating a “one stop shop” to access, consolidate and interpret multiple sources of data into predictions of demand for EV charging, layered with our team's knowledge of forecourts.

Relevant data includes local vehicle types, traffic and journey data, the proportion of local drivers who have access to home charging and charging behaviours. The result is an understanding of the overall potential for local EV charging demand which is then further enhanced comparing the site with local competition for charging provision.

It is the vehicle that determines the speed of charge, not the charger. An understanding of all of these factors predicts the type and number of chargers which could be appropriate for an individual site location. Understanding customer behaviours further informs the duration of charge sessions or “dwell time” which influence both the amount of kWh that could be sold, and the opportunity for basket building.

In the short- to medium-term, we would anticipate that site operators will continue to invest in liquid fuels as well as other very profitable revenue sources such as valeting but supplemented with a growing interest in preparing their sites for the future with alternative fuels.

Short-to-medium-term opportunities for providing alternative fuels exist all over the country, but there is also the potential to get it wrong. The Edison profiler – developed in partnership with Cenex – exists to help retailers make informed decisions using the best data available to them, agnostic of the technology options, and realistic about the actual demand. ■

SORTING THE WOOD FROM THE TREES

Paul Sewell, managing director of MUA Property Services, helps us understand the Budget changes to business rates

Last year I reported on the reduction in the Retail Hospitality and Leisure Relief (RHL) from 75% to 40%, subject to a company/group cap of £110k pa in total. By reducing only one of the elements, this favoured larger operators over small, as the former simply spread their capped relief across more properties.

The new Government has now hardwired RHL into the system by legislating a separate multiplier (poundage) up to 20% below the small multiplier (49.9p in £ in 2025/26) to be financed by an up to 10% addition for large properties over £500k-plus RV. Petrol stations continue to be a named use within the 'R' part of RHL.

The confirmed multipliers for the 2026/27 financial year are below:

A 1p supplement for transitional relief will also be added for properties not receiving transitional relief or Supporting Small Business Relief (SSBR), meaning the "actual" multipliers for many properties might be 1p higher than the figures listed below.

These multipliers suggest the "up to" as being very relevant, setting reductions of 12.5% and 10.5% respectively for small and standard sizes rather than the hoped for 20%. Abolition of the £110k cap again favours multiples vs. the singleton operator.

The previous 49.9p poundage then fades into the past on 31/3/2026, but the 49.9p vs. 43p comparison, with the latter including inflation as well, gives us a feel for the measure of growth in the national aggregate RV.

On Budget Day, the Valuation Office Agency (VOA) website re-opened after a short closure to display the draft RVs for the 2026 Revaluation. Again, a reminder of last year is pertinent, when I reported that central negotiations were almost complete based on valet and shop elements remaining largely unchanged, although there was an increase from £2.1m to £2.2m proposed for the ceiling shop turnover to be applied ex-VAT.

A 50% increase in the forecourt RV ppl factor from 4ppl to 6ppl was proposed and this was effectively halved via our representations and by reducing the "margin conversion to RV" factor (CRF). On an average priced site with trade status quo with a 60:40 RV split between shop and fuel, this would add around 10% to total RV. "Status quo" is relevant here as the valuation date for the last cycle was within the last Covid lockdown, with the VOA persuaded to adopt a generous interpretation of 'fair maintainable trade' to reflect this. Those circumstances have largely passed apart from residual WFH and are fully reflected in latest trading figures.

The VOA will now assess dedicated EV charging spaces for the first time, as the Chancellor only granted these relief rather than exemption in the Budget. This raises the prospect of the VOA having to raise thousands of "ghost assessments" for which the councils issue bills at £0. They will also claw back the losses from ATMs being de-rated by the Supreme Court by now adding licence income and commission to main service revenue, alongside income from other non-rateable machinery such as laundry machines and electronic delivery lockers.

The overall changes from the Budget, affecting both the valuation and the tax rate calculations, will be confusing to many. Having attended a group discussion recently on the implementation of these reforms, there is genuine concern from councils that they are in a race against time to prepare timely accurate bills reflecting the niche issues such as SSBR and SBRR (small business rate relief). ■

• Scotland and Wales multipliers won't be released until the New Year, so are unfortunately excluded from this report due to print deadlines.

CATEGORY	RATEABLE VALUE (RV) THRESHOLD	MULTIPLIER (PENNY IN THE POUND)
Small Business RHL	Below £51,000	38.2p
Standard RHL	£51,000 – £499,999	43.0p
Large (All Properties)	£500,000 and above	50.8p
Small Business (non-RHL)	Below £51,000	43.2p
Standard (non-RHL)	£51,000 – £499,999	48.0p

“The VOA will now assess dedicated EV charging spaces for the first time, as the Chancellor only granted these relief rather than exemption in the Budget”

On Your Side

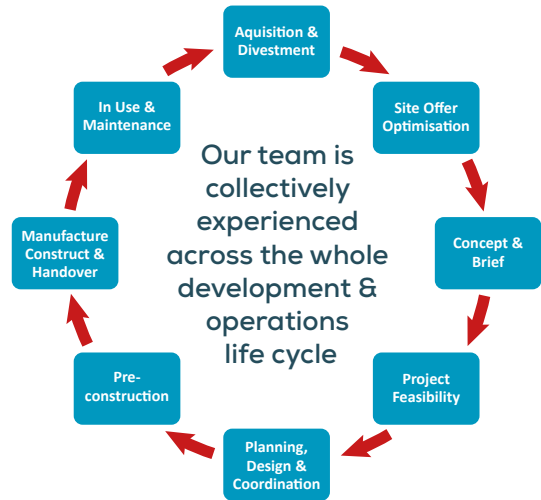
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STELLAR PERFORMANCE

Steve Rodell, managing director – Retail & Leisure, Christie & Co, on how the petrol filling station sector is outperforming the broader property market amid economic recovery

As the UK economy begins to strengthen and investment activity resumes momentum, the petrol filling station (PFS) sector has emerged as a standout performer relative to the wider property market.

The PFS sector in the UK has demonstrated resilience in recent years. Despite structural change, cost pressures and the advent of EVs, revenue across the petrol station industry is approximately £5.3bn, up from £5bn in 2024 (*ACS Forecourt Report 2025*).

While the number of PFS sites has fallen from the peaks of the 1990s, as retail consolidation and competition from supermarkets reduced smaller and remote stations, numbers have remained stable at around 8,500 with significant investment going into NTIs (new-to-industry) sites over the last decade or so.

Transaction activity in the sector has picked up. Going concern transactions picked up in 2024 and momentum continued through 2025. Christie & Co brought a similar number of sites to market compared with 2024 and over a five-year period the average price achieved has increased by 69%, with a noticeable difference being the wider pool of participants which includes new entrants and financial institutions.

Yields for 'roadside and automotive assets', which includes petrol stations, are being compressed as investor demand grows for stable income-producing real estate.

Despite macro cost pressures, the forecourt market benefits from its unique mix of location-driven business (fuel and convenience retail), long-lease structures and adaptability to new formats.

By comparison, the broader real estate market is showing encouraging signs of stabilisation but remains cautious. Several leading advisers in UK real estate expected capital values



Christie & Co's Steve Rodell

“The average price achieved in PFS sales has increased by 69% over the past five years”

to rebound in 2025, aided by lower inflation, anticipated interest rate cuts and renewed investor confidence. However, inflation has returned, interest rates held, and confidence very much depends on the sector.

COMPARATIVE PERFORMANCE AND KEY DRIVERS

When comparing both markets, several themes emerge:

Income stability: Many PFS have long leases with strong occupiers (oil companies, multiple grocers) and benefit from non-fuel retail turnover (shop, food, services) which helps offset fuel-volume cyclicality. This gives the sector an advantage over some commercial property segments still grappling with lease maturity and voids.

Yield compression/price growth: The PFS sector is experiencing investor-driven yield compression and rising transaction values. Meanwhile, the broader property market is only just moving out of value decline and remains reliant on income returns rather than dramatic capital appreciation.

Economic context: If the UK economy shows no signs of significant improvement, the sector could still benefit due to the needs of drivers and consumers using forecourts. Forecourts may also benefit more directly from changing mobility trends, fuel demand resilience, and diversification into convenience retail.

Structural resilience: Despite the longer-term threat of EVs and fuel volume decline, forecourt operators are evolving (for example non-fuel retailing, EV charging hubs) and acquiring investor interest because of their adaptation. The broader property market still faces structural headwinds such as office oversupply, retail disruption, and limited new housing supply.

OUTLOOK AND IMPLICATIONS FOR INVESTORS

Given the economic backdrop and strong comparative performance, investors should take note of how:

- ▶ The forecourt sector continues to offer a potentially attractive proposition: stable cashflows, structural adaptation, strong investor demand, and yield compression.
- ▶ In the broader property market, returns will still be driven primarily by income growth and location/asset quality rather than rapid value upside.
- ▶ Risk selection remains crucial: within forecourts, site location, operator strength and non-fuel retail mix matter. Within general property, secondary assets and weaker locations may lag.
- ▶ Longer-term structural themes such as EV transition, retail shift, and housing supply will influence both sectors, but forecourts appear to be further ahead in adapting to changes.

In summary, the PFS market is outperforming the broader property sector in a number of meaningful ways: higher transaction activity, significant value uplift, and strong demand. For investors seeking resilient property in an improving economic environment, high-quality forecourt/roadside assets merit serious consideration. ■



Maddy

MADDY'S MARK

“Maddy’s Mark was founded in memory of Maddy Lawrence, whose love for rugby and zest for life continue to inspire us. Maddy’s Mark supports the mental well-being of girls and young women by building resilience, confidence, and camaraderie. Through funding school programmes and partnering with clubs, we aim to make rugby accessible to all who wish to play.

We believe that getting involved in sports such as rugby has the power to change lives. By supporting us, you help inspire and create a lasting legacy, ensuring that Maddy’s passion continues to empower future generations. Many thanks to you all”





LEGAL MATTERS

Motor Industry Legal Services (MILS) discusses the continuing challenge of accommodating transgender women in the workplace and the significant changes to employment law proposed by the Employment Rights Bill

In an odd coincidence, 2025 has been bracketed by two well-publicised cases concerning gender in the workplace.

In April, the Supreme Court case *For Women Scotland Ltd (Appellant) v The Scottish Ministers (Respondent)* UKSC/2024/0042 decided that in the Equality Act 2010 ('EqA 2010'), "woman" refers to a biological woman and "sex" refers to biological sex. As many will be aware, the EqA 2010 is the legislation which prohibits discrimination on the grounds of defined protected characteristics, for example race or gender. At first glance, the Supreme Court decision does not seem like a controversial one. However, prior to the Supreme Court's judgment, lawyers and beyond interpreted that a "woman" in the EqA 2010 was either a biological woman or a trans woman (biologically male) who held a Gender Recognition Certificate. The Supreme Court decision essentially says that a 'woman' for the purposes of the EqA 2010 in its current format does not include a trans woman who was born biologically male.

In December, in the case of *Ms Sandy Peggie v Fife Health Board (1) Dr B Upton (2)* [Case no. 4104864/2024], an Employment Tribunal was asked to consider whether Ms Peggie was harassed by NHS Fife when she was suspended after complaining about having to share a changing room with a transgender doctor, who was born male but identifies as a woman.

While the majority of Ms Peggie's claims failed, the tribunal found that how the Trust conducted itself during the investigatory and disciplinary process was itself discriminatory and victimised Ms Peggie resulting in a partial success.

Given that this is only an Employment Tribunal decision, and therefore not binding, and the fact it is only a partial victory, it is anticipated that Ms Peggie will likely appeal to a higher court.

THE EMPLOYMENT RIGHTS ACT

This year is set to be the year the government passes its flagship

Employment Rights Bill. While this is set to include a number of significant changes, it should be noted that currently the scheduled timeline for implementation of these changes has pushed back some of the most significant changes by quite some distance. This is good news for employers as it will afford more time to prepare. It also gives employers a chance to potentially take actions while the lower thresholds on dismissals within the first two years of employment, still apply.

2026 CHANGES

APRIL 2026:

- ▶ Collective redundancy protective award – doubling the maximum period of the protective award.
- ▶ 'Day 1' Paternity Leave and Unpaid Parental Leave.
- ▶ Further whistleblowing protections.
- ▶ Fair Work Agency body established.
- ▶ Statutory Sick Pay – remove the Lower Earnings Limit and waiting period.
- ▶ Simplifying the trade union recognition process.

OCTOBER 2026:

- ▶ The changes to 'fire and rehire (F&RH)' legislation have been pushed back until October 2026 (the Government is banning F&RH aside from financial emergencies whereby an employer does not gain an employee's consent to change their contract so they are dismissed then re-engaged on the changed terms).
- ▶ Employment Tribunal time limits changes to be implemented.
- ▶ Introducing an obligation on employers not to permit the harassment of their employees by third parties.

2027 CHANGES

- ▶ The major news is that the proposed

change to the two-year unfair dismissal qualifying period has not only been pushed back to 2027 but also reduced to a six-month period rather than being abolished entirely.

▶ This is good news for employers. The main reasons for the delay are consultations on how the new statutory probation period will work. ACAS will also have to change their Code of Practice to fit the new changes. However, given the recent changes, the timetable for implementing the new qualifying period is now less certain. While it is still provisionally 2027, this may now come through sooner given the political importance of the changes and the need for less radical consultation.

▶ Ending the exploitative use of zero hours contracts and applying zero hours contracts measures to agency workers. This delay is to consult on the guaranteed hours element of the new changes, which all stakeholders involved have been complaining about as they are unbelievably complicated at this stage.

▶ Introducing a power to enable regulations to specify steps that are to be regarded as "reasonable" when considering whether an employer has taken all reasonable steps to prevent sexual harassment. Again, this is welcome guidance which is beneficial to employers.

IN CONCLUSION

As always, this advice is general in nature. As an RMI member you have access to industry experts including barristers and solicitors who are fully qualified and specialise in issues affecting the motor and petrol retail industry. Should you find yourself in the situation above, contact us at any stage for advice and assistance as appropriate on 01788 538 399.

MOTOR INDUSTRY LEGAL SERVICES

- *Motor Industry Legal Services (MILS) provides fully comprehensive legal advice and representation to UK motor retailers for one annual fee. It is the only law firm in the UK which specialises in motor law and motor trade law. MILS currently advises over 1,000 individual businesses within the sector as well as the Retail Motor Industry Federation (RMI) and its members.*

Parkfoot in West Malling, Kent, won the inaugural Forecourt Trader of the Year Award nearly 30 years ago



Photos courtesy of Forecourt Trader



The customer experience is key at Parkfoot

A SITE TO BEHOLD

Having won the first Forecourt Trader of the Year Award in 1996, David Charman's Parkfoot site has made it a double by winning the prestigious award nearly 30 years later, in 2025



A lot has changed since that first win back in 1996, with the latest developments thanks to a £1m investment in a complete refit, which transformed the retail space.

In response to changing shopping habits, the shop layout was designed to improve flow and accessibility, making it easier for customers to find what they want. The upgrade not only enhances the aesthetic appeal but also improves operational efficiency, ensuring Parkfoot's many customers enjoy a modern shopping experience.

A key addition to its offering is the dedicated kitchen, used to create

homemade range Parkfoot EATS. The food is crafted using high-quality ingredients sourced directly from the site's in-house butcher. It's been a great success, attracting more customers and increasing overall sales.

At Parkfoot, the ethos has always been to deliver an exceptional customer experience while maintaining the highest standards of appearance, cleanliness and product availability – and that still holds today.

High standards are maintained through regular staff training and a well-structured cleaning routine. This extends to the forecourt itself to ensure

The store's redesign puts a major focus on food-to-go

it is always clean and inviting, with daily tasks that include litter picking and fuel pump cleaning.

David has embraced technology by introducing self-service checkouts, which now account for 40% of transactions, streamlining the checkout process for customers. Additionally, shelf-edge labels were updated with the latest technology and the store's ATM is now free to use.

He says it was absolutely fantastic to win again at the 2025 Awards: "Things have moved on so much since we first won so to win again 29 years later is really quite extraordinary." ■



Good coffee-to-go is vital for forecourt stores

DRIVING FOOTFALL

Andy Crossan, Head of Insight at Lumina Intelligence, discusses how forecourts can turn more fuel stops into store visits

There is no substitute for a strong convenience offer at the forecourt. The vast majority of operators (83%) believe it is the most important service for consumers on-site. Yet attracting shoppers into the store is becoming more difficult: one in three operators say declining footfall has been a significant change over the past 12 months.

DRIVING STORE VISITS

Convenience remains central to why consumers visit forecourts.

Pay-at-pump continues to grow in relevance, with one in four consumers now wanting to see it available more often.

But with challenges such as power capacity and limited space holding back EV charger installation or expansion, operators cannot rely on longer dwell times alone to drive food and drink sales.

New ways of increasing footfall are

emerging. Parcel collection is now a key driver of visits, with 25% of drivers stopping for parcels even when they don't need to refuel or charge their EVs – up from 18% the previous year.

Encouraging shoppers on 'fuel-led' trips to leave with something extra will remain essential for boosting basket size and repeat visits.

'BRAND-LED' FORECOURT SHOPPERS

While forecourt shoppers monitor fuel prices closely – three in four keep a watch on their local forecourt's fuel prices – they are less price-sensitive in-store compared with the average convenience shopper.

Some 61% are brand-led – a significantly higher proportion than usual. This creates a fruitful spot for

new products, particularly as customers may already feel comfortable making a premium purchase after paying for fuel – normally a 'big-ticket' purchase.

Meeting drivers' desire for a 'pick-me-up' can convert them into store shoppers. The sensory triggers of fresh coffee and bakery aromas can be especially powerful.

FOOD-TO-GO AND COFFEE SATISFY VISITORS

Hot coffee remains vital for forecourt stores, a view shared by two in three operators.

Consumers, meanwhile, agree on the importance of food-to-go: 40% say a large range is essential.

Pairing coffee with other food items can be highly effective, with hot drinks now frequently appearing in both breakfast and lunch meal deal offers in convenience stores.

Breakfast deals featuring bakery goods are particularly appealing. As a result, placing bakery at the front of the store is becoming more common.

Location matters when it comes to capturing impulsive, unplanned purchases, which are more frequent in forecourts.

THE FUTURE

Food-to-go will play an increasingly critical role. Leaders in EV charging are developing 'travel hub' destinations, forming branded partnerships with fast-growing restaurant chains – such as EG On The Move's collaboration with Popeyes. These hubs are set to appeal to shoppers seeking richer in-store experiences, with services like butchery and deli counters likely to become more visible in larger stations.

For operators with limited space, driving visits through other avenues has become more challenging for those that saw high visiting numbers for disposable vapes – banned in the UK in June 2025.







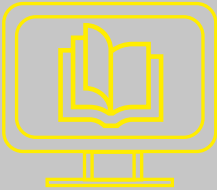




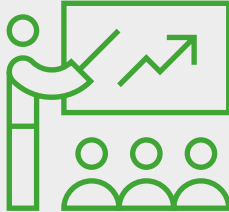
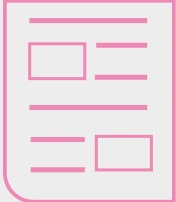
To spur impulsive food and drink purchases, operators will need to engage customers through multiple touchpoints. Clear, consistent signage for food-to-go and coffee – both in-store and along the approach, supported by well-timed social media activity – will be essential for conversion.

Sources: Lumina Intelligence 2025, MCA News 2024 ■

“To spur impulsive food purchases, operators will need to engage customers through multiple touchpoints”

ASSISTING YOU

Running a busy petrol station is hard work in itself, then there's all the rules and regulations to consider. Membership of the PRA will keep you abreast of current and upcoming changes, and provide you with year-round support – details below

Help and advice	 <p>Technical support</p>	 <p>Legal advice</p>	 <p>Business rates</p>
Representing your interests	 <p>Liaising with policy makers</p>	 <p>Lobbying Government</p>	 <p>Media representation</p>
Member benefits	 <p>Online training</p>	 <p>Banking offers</p>	 <p>Utility offers</p>  <p>Support against crime</p>
Keeping you informed	 <p>Members website</p>	 <p>Events and presentations</p>	 <p>Fortnightly newsletter and annual Market Review</p>

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