



# **IPT**

## **GAS STATIONS OF THE FUTURE** **A peek into the future design and** **technologies enhancing customer experience**

**September 2019**

**IBEF, Beirut**

**Aya Issa, IPT Group**

## What We Will Cover

- A- The current situation of the fuel retail industry**
- B- The outlook scenarios of the various international energy agencies and major Oil and Gas Companies**
- C- What Trends will drive the petrol retail sector in the future?**

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# IS THERE A FUTURE FOR SERVICE STATIONS?

- End of an era in fuel retail?
- Forces of disruption
  - The take-off of Alternative Fuels
  - Evolution of consumer expectations
  - Shift of market?



- Fundamental transformation of standard business model
- Opportunity: adopt innovative solutions in the fields of technology and sustainability.

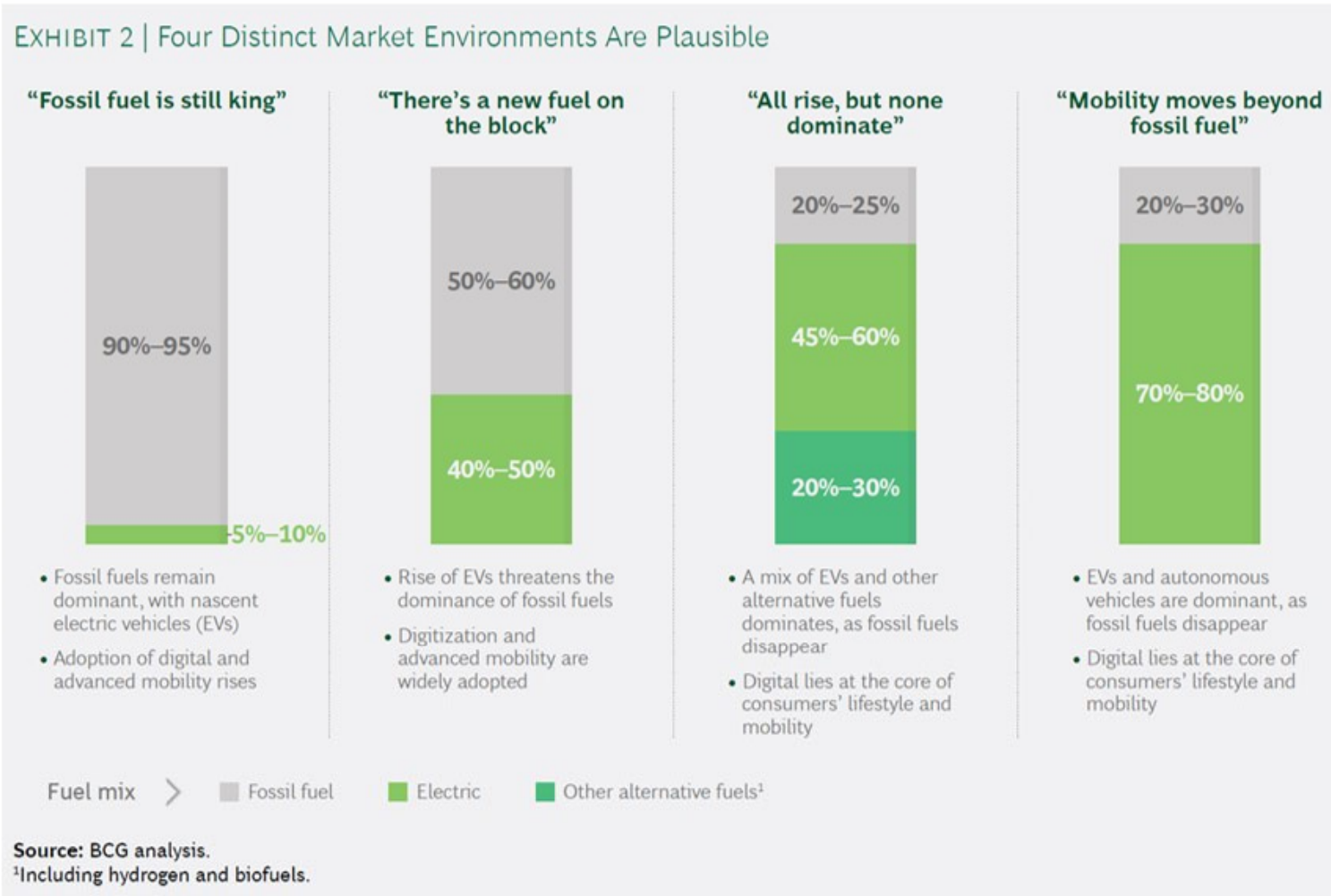
## What We Will Cover

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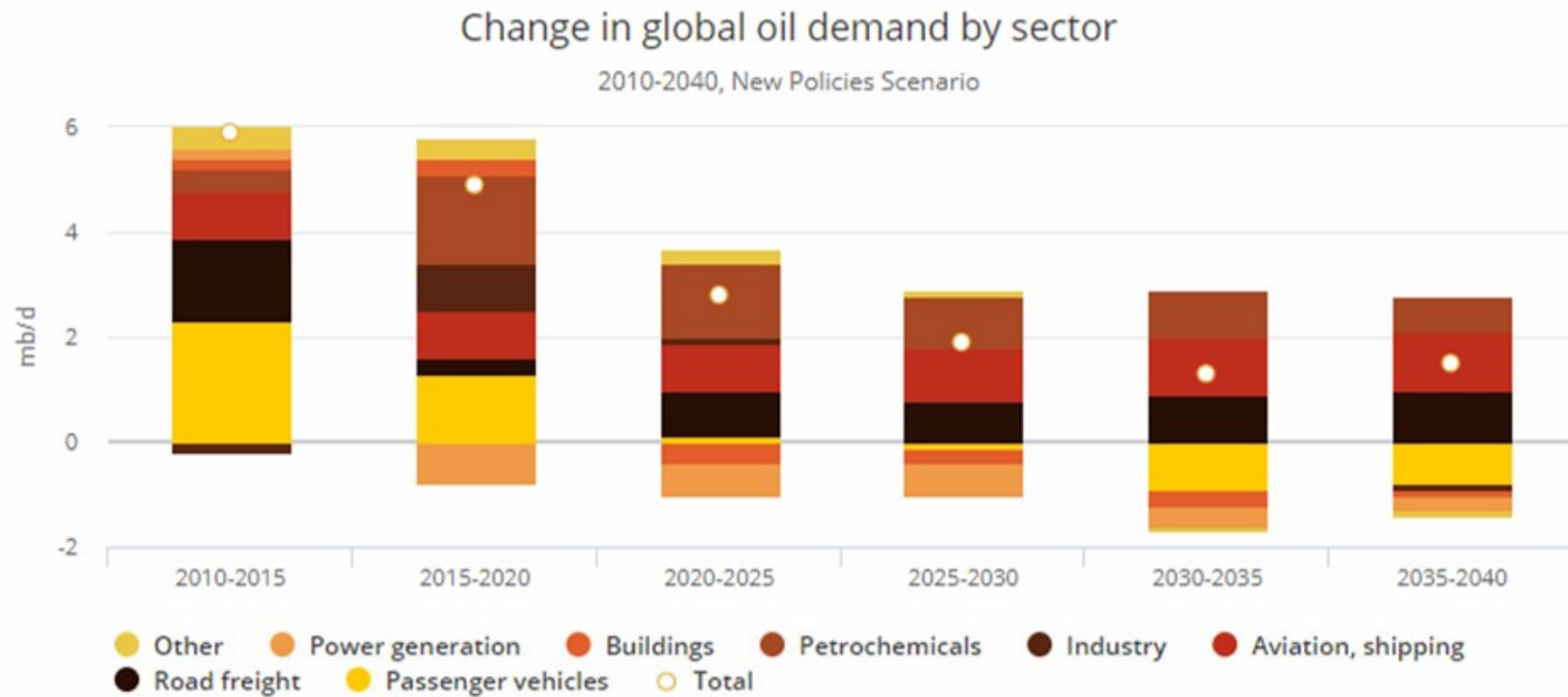
**B- The outlook scenarios of the various international energy agencies and major Oil and Gas Companies**

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# Four Future Market Environments - Scenarios



## The era of oil is not yet over



World Energy Outlook 2017, IEA

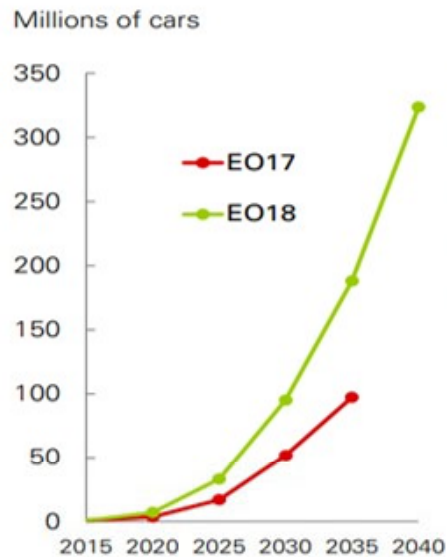
# Growing Energy Demand

Comparisons

## Extending the Energy Outlook to 2040...

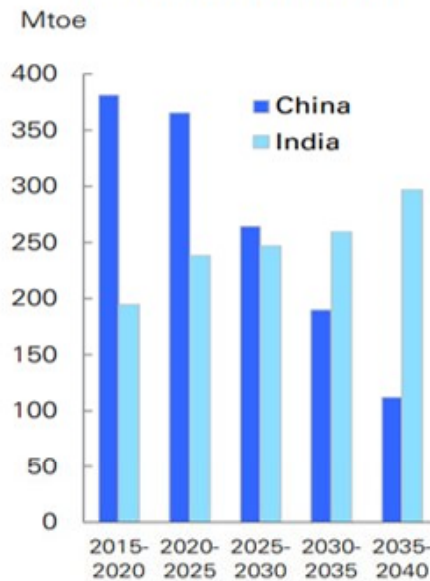


Electric cars\*



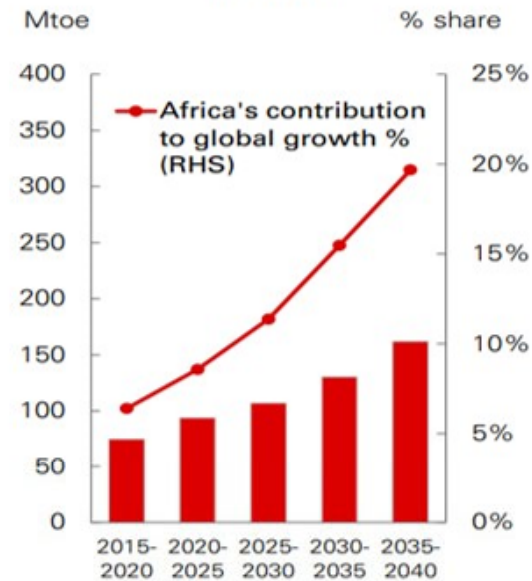
\*Includes plug-in hybrids

Energy demand growth in China and India



112

Energy demand growth in Africa

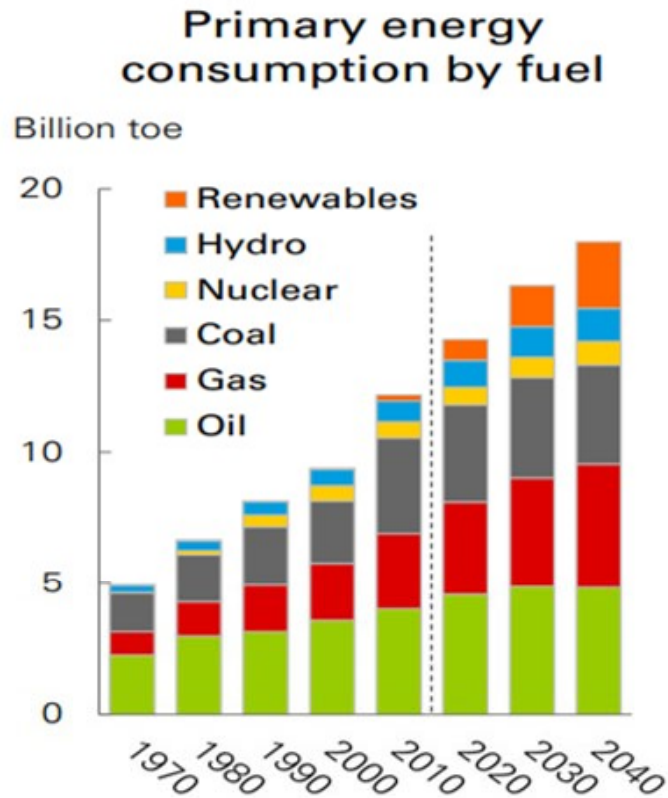


2018 BP Energy Outlook  
© BP p.l.c. 2018



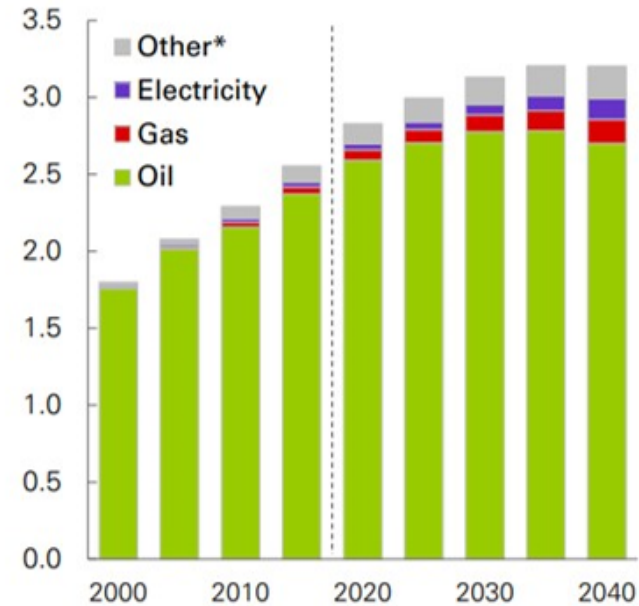
# Primary Energy Consumption by Fuel

BP Energy Outlook - 2018 Edition



# Transport energy consumption by fuel type

Billion toe



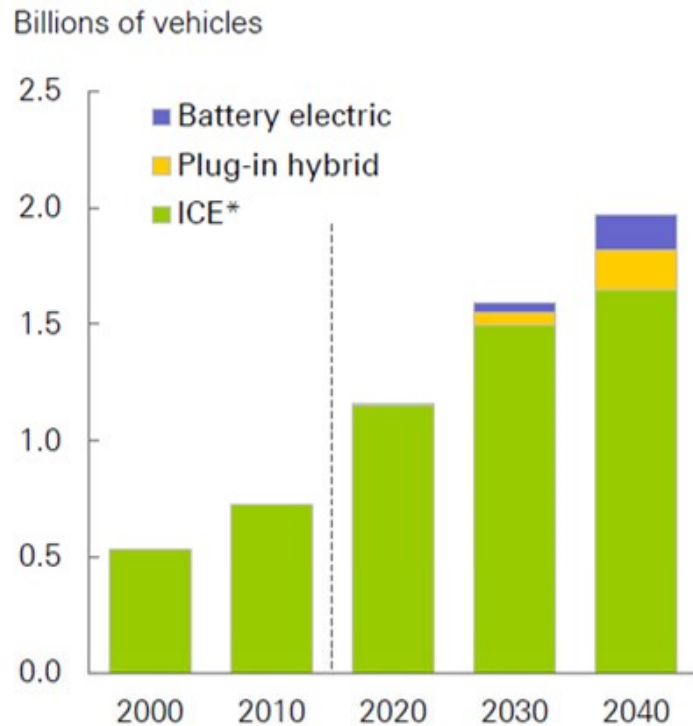
\*Other includes biofuels, gas-to-liquids, coal-to-liquids, hydrogen

# Transport Energy Consumption Forecast

BP Energy Outlook - 2018 Edition

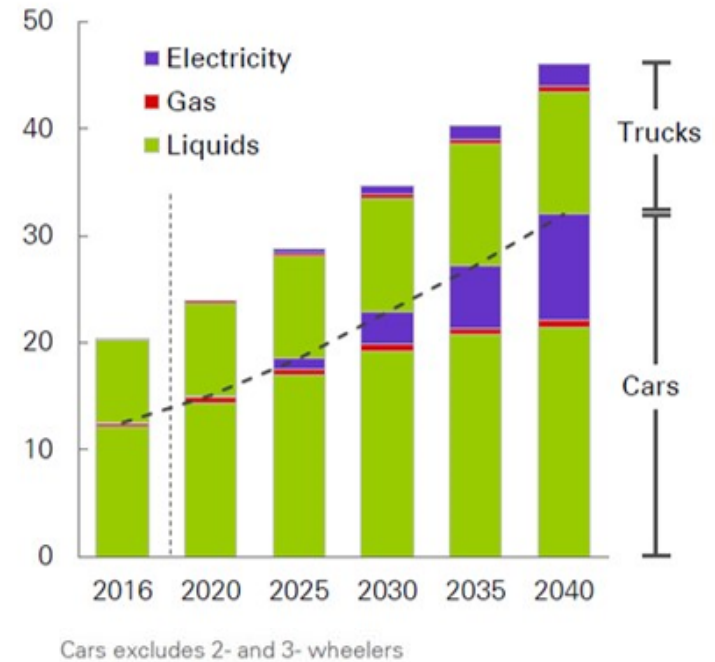
# Number of Passenger Cars Forecast

BP Energy Outlook - 2018 Edition



# Vehicle kilometres (Vkm) by fuel type

Trillion km



# Road Transport Energy Consumption Forecast

BP Energy Outlook - 2018 Edition

**Oil will remain dominant, despite the increasing use of renewables and alternative fuels in transport.**

**This fact will shape the future of the gas station**



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## **New Trends → More Opportunities**

- 1. Diversity in fuel offering**
- 2. The Customer Centric Approach**
- 3. Adapting to the highly transformative phase of fuel retail**
- 4. Reliance on Sustainability**

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## 1. Diversity in fuel offering Gasoline & Diesel...Improved



## Diversity in fuel offering

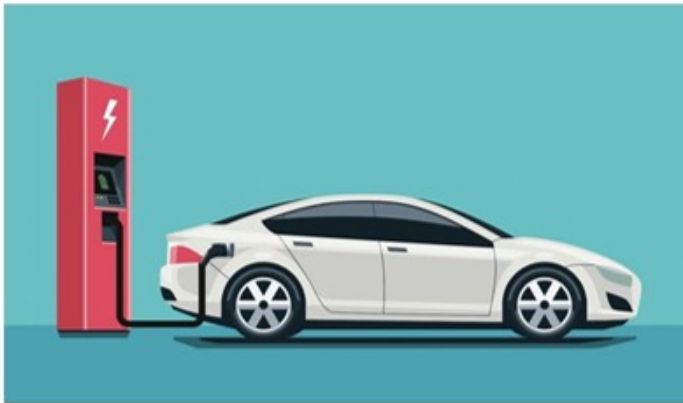
Biofuel, Ethanol, LNG, Hydrogen Gas



ALTERNATIVE  
FUELS

## Diversity in fuel offering

### Electric Vehicles & Charging Points





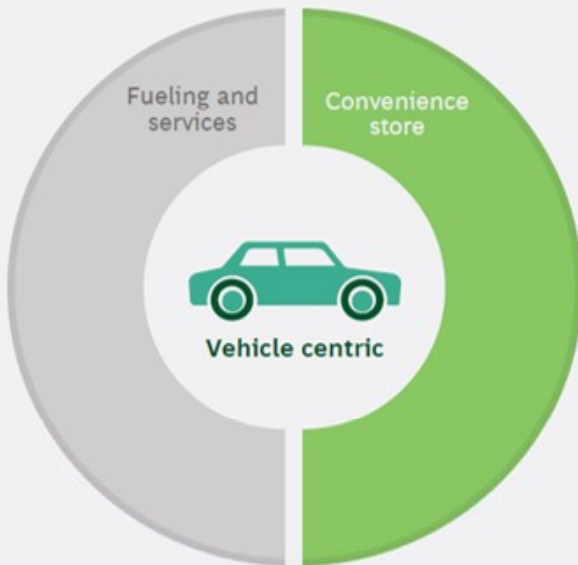
## 2. The Customer Centric Approach

### The pathway towards brand loyalty



EVOLVING CONSUMER EXPECTATIONS

Today's traditional fuel retailers are vehicle centric



In the future, fuel retailers should become customer centric to capture opportunities in adjacent spaces and play a wider role in the ecosystem



### 3. Adapting to the highly transformative phase of the fuel retail Reimagining Downstream Automation

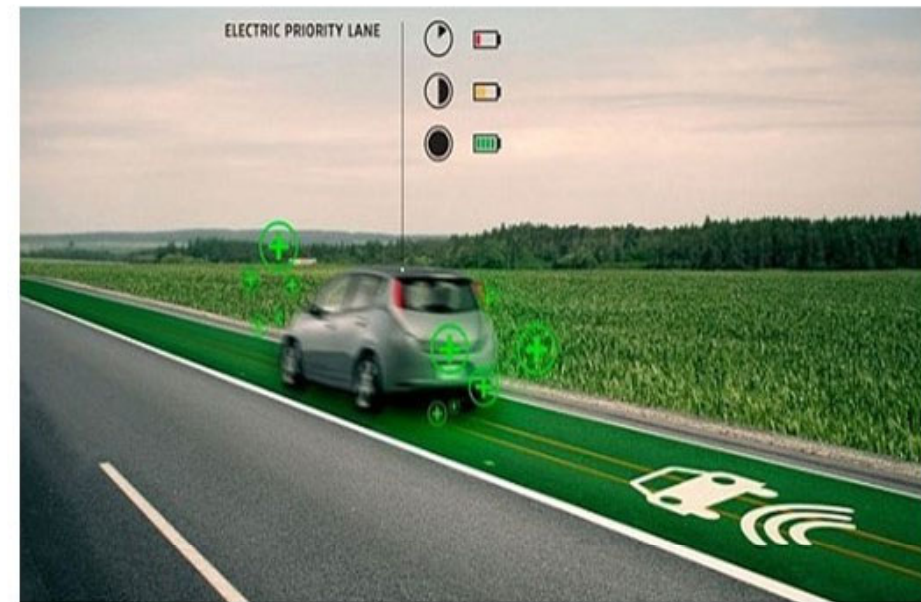


### 3. Adapting to the highly transformative phase of the fuel retail

#### Reimagining Downstream Automation



ADVANCED  
MOBILITY



Enabled through digital and technology

## 4. Reliance on Sustainability



### Sustainable practices a gas station should include

- Solar System
- Geothermal System
- District Heating
- Efficient LED Lighting
- Nitrogen Tire Inflator
- Waste Water Treatment & Rainwater Collection
- Water Saving Fixtures
- Vapor Recovery System
- Hydrocarbon Leak Detection and Prevention
- Green Landscape
- Health and Safety

