

April 04, 2022

Branded Fuels Market and Differentiation in Poland

Stratas Advisors

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Poland's main fuel retailers include:

- PKN Orlen
- Grupa Lotos
- BP
- Shell
- Circle K
- Amic
- Total
- AS 24
- IDS

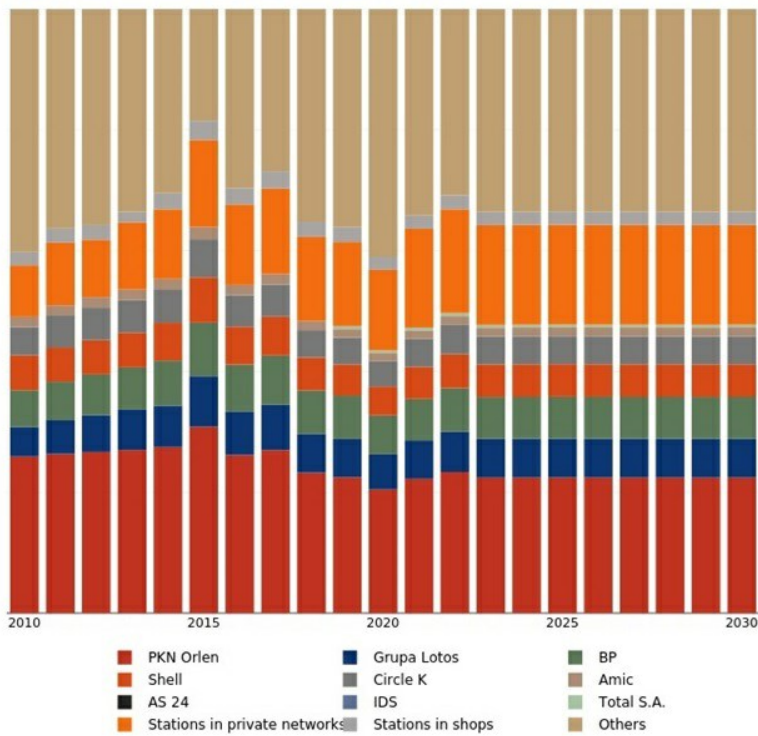
According to the Polish Oil Industry and Trade Organisation (POPiHN), 30% of retail stations in 2020 belonged to domestic companies, 20% to international ones, 2.4% to hypermarkets and 47.3% to private owners. The latter group comprised over 1,000 stations, which belonged to operators owning at least 10 stations functioning under one brand. The market share of this group of operators amounted to 19.2%.

Market Share

Throughout 2020, due to the pandemic, stations owned by oil companies, as well as other outlets sold less standard fuels than the year before with about a 9% decrease in retail fuel sales, according to POPiHN. The diesel market was somewhat saved by sales outside retail stations – to direct wholesalers, which in the end resulted in a smaller decrease in the overall sales volumes of this fuel type than in the case of gasoline, which is almost entirely sold through retail stations. As of 2020, PKN Orlen is the largest gasoline and diesel retailer in Poland with the highest market share at 21%, followed by BP at 7% and Grupa Lotos at 6% (see figures below).

Motor Fuel Gasoline Market Share by Brand

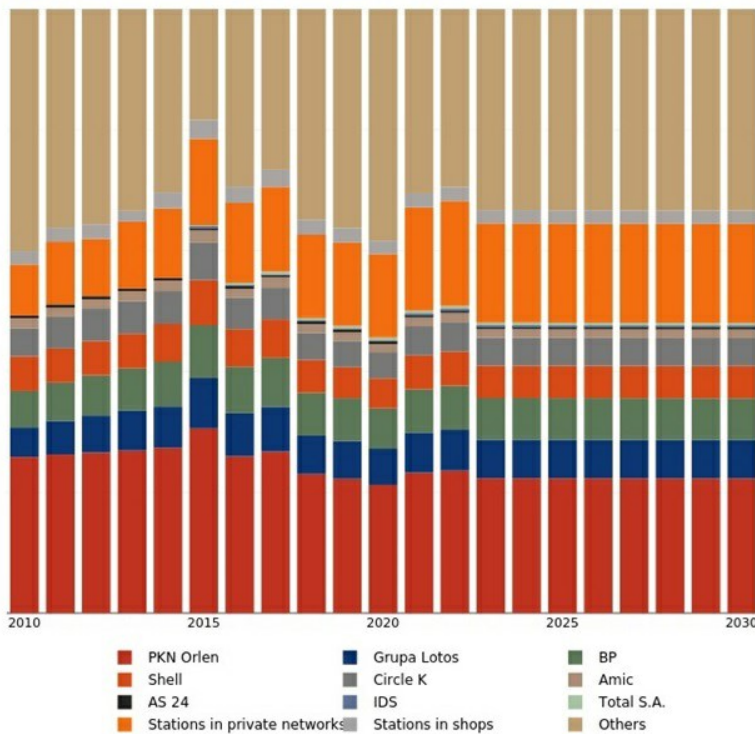
Poland Gasoline Retail Market Share



Source: Stratas Advisors

Motor Fuel Diesel Market Share by Brand

Poland Diesel Retail Market Share



Source: Stratas Advisors

Branded Fuels Market and Differentiation

Despite the presence of dominant player PKN Orlen, there are several diverse fuel brands in Poland with moderate competition among retailers. There are at least 10 known retailers offering branded fuels in Poland with various strategies in place to differentiate their products from other brands, including PKN Orlen, Grupa Lotos, BP, Shell, Circle K, Amic, Total, Sloznaft, MOYA and AVIA (Unimot) (see table below). They offer branded fuels containing fuel additives to improve engine performance and fuel consumption, increased power and higher mileage, longer service life and durability, amongst other benefits. Currently, branded gasoline accounts for at least 10% share of Poland's retail fuel market and similarly, 9% for branded diesel. Stratas Advisors estimates the share for branded gasoline to remain stable through 2025, while a 1% drop is expected for branded diesel.

List of Branded Fuels from Select Retailers in Poland and their Differentiation Strategy

Brand (Operator)	Non-Branded Gasoline Grades	Branded Gasoline Grades	Non-Branded Diesel Grades	Branded Diesel Grades	Differentiation Strategy
Orlen (PKN Orlen)	VERVA 98 E5	EFACTA 95 E5	VERVA DIESEL B7	EFACTA DIESEL B7	VERVA fuels are created for drivers who expect improved engine performance in various weather conditions and with variable load, while the unique formula of EFACTA fuels combined with the most modern additives ensure that selected engine components are cleaned.
Lotos Group	LOTOS 95, LOTOS 98	Dynamic 98	LOTOS Diesel, LOTOS Diesel TIR	Dynamic Diesel	Jointly developed with BASF, the additive package significantly improves the capacity of the nozzles, lubricity, service life and efficiency of the engine. In winter, it is allowed to use depressants improving low-temperature properties in diesel.
Circle K	Miles 95, PB 95, PB 98	Miles Plus 95, Miles Plus 98, Miles Plus 95 winter gasoline, Miles Plus 98 winter gasoline	Miles Diesel, Winter Miles Diesel	Miles Plus Diesel, Arctic Miles Plus Diesel	Worked with an additive supplier to develop a powerful next generation in-fuel additive for Miles Plus delivering more power and acceleration for a superior driving experience, along with fuel consumption improvement of up to 3%.
Amic		Pro 95	Diesel	Pro Diesel	Amic Pro fuels provide engine protection, increased power and higher mileage.

Source: Compiled by Stratas Advisors citing various oil companies

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