

August 24, 2022

# Global Transport Fuels Assessment: The Retail Market in Italy

Stratas Advisors

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## Number of Sites

### List of Automotive Fuel Retailers

Italy's retail fuel market is characterized by high entry costs and a small number of vertically integrated companies that have access to crude oil or hold shares in companies that operate refineries in Italy or Europe. Each company operates a network of resellers with exclusive agreements that bind resellers to the wholesaler, making it challenging for other companies to enter the market.

In particular, the following five major companies hold about 67% of the retail market, while the rest is run by small independent retailers (also known as white pumps) which purchase fuel from the large companies:

- ENI
- IP Gruppo API
- Q8 (Kuwait Petroleum International, or KPI)
- Esso (EG Group)
- Tamoil

Former retail players include Shell, Saras, TotalErg and IES (MOL), where Shell stations were acquired by Q8 in 2014. Subsequently in 2018, TotalErg's retail stations were acquired by IP Gruppo API and IES' stations by Tamoil.

### Total Number of Retail Stations

One year after the approval of the "Annual Law for Market and Competition" (Law n. 124/2017), on August 24, 2018 the deadline expired for the requirement that service station owners enrol their sales points along roads and highways in the Ministry of Economic Development's Sales Point Registry and at the same time, auto-certify the compatibility or incompatibility of their sales points. According to preliminary indications, with regard to the adaptation or closure of incompatible retail stations, the legislation led to lower than expected results i.e. fewer than 600 incompatible stations on a network of around 22,500. The aim for rationalizing Italy's retail fuel network, still much larger than the rest of Europe, was not realized, thus new legislative interventions are being contemplated to enhance the safety and quality of fuel distribution in Italy.

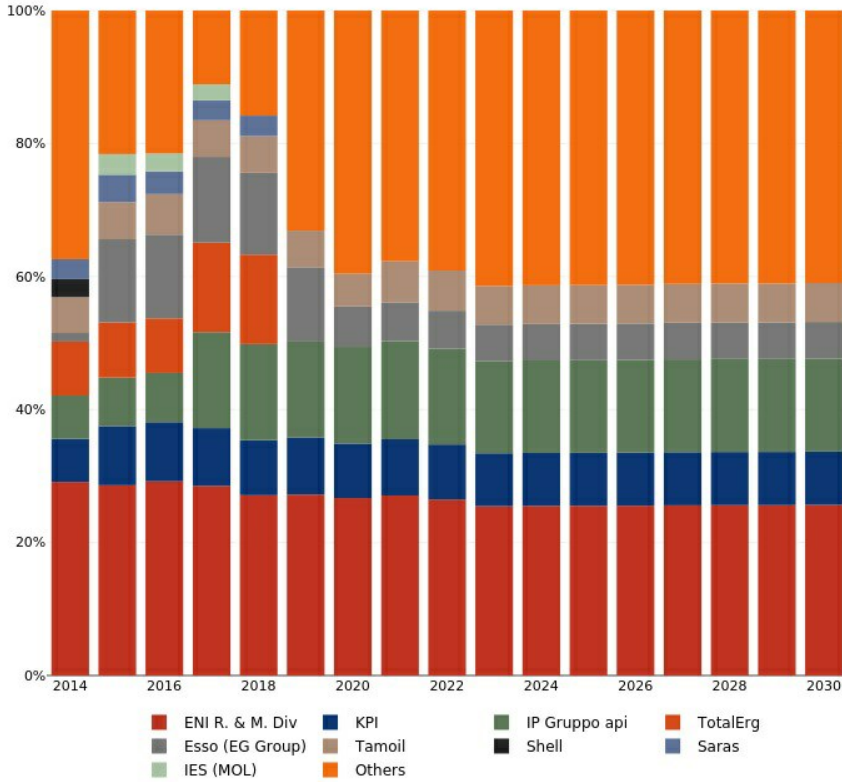
As of 2020, the total number of retail stations in Italy was 21,750.

### Market Share

As of 2020, ENI is the largest retailer of gasoline, diesel, auto LPG and CNG in Italy, followed by IP, Q8, Tamoil and Esso (see figures below). Infrastructure for charging electric vehicles (EV) has also been established and hydrogen refueling stations are becoming available in Italy.

**Motor Fuel Gasoline Market Share by Brand**

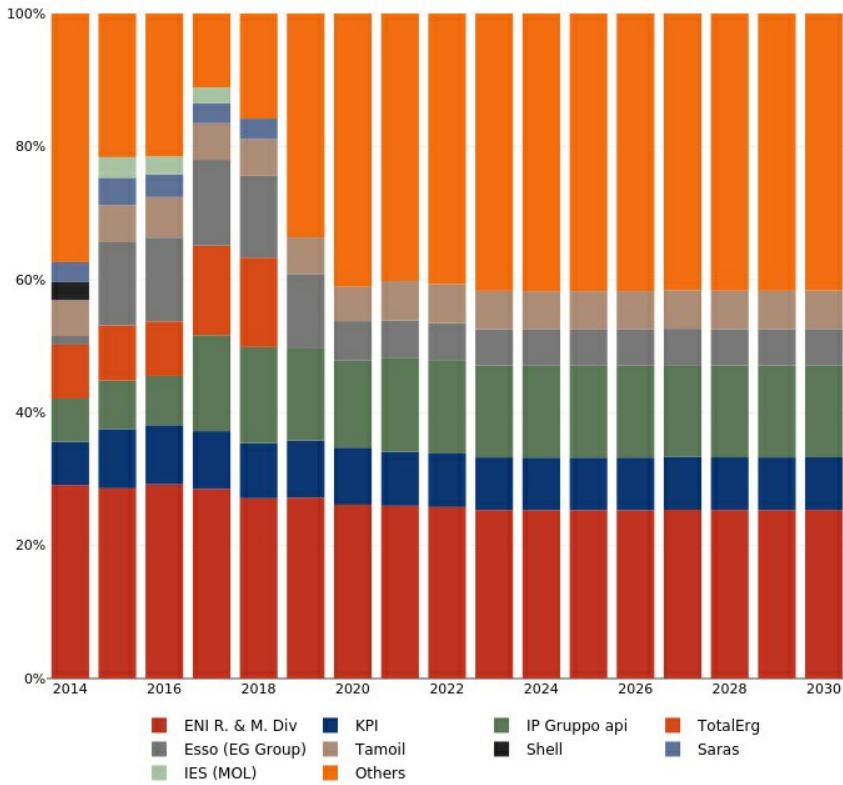
Italy Gasoline Retail Market Share



Source: Stratas Advisors, 2022

**Motor Fuel Diesel Market Share by Brand**

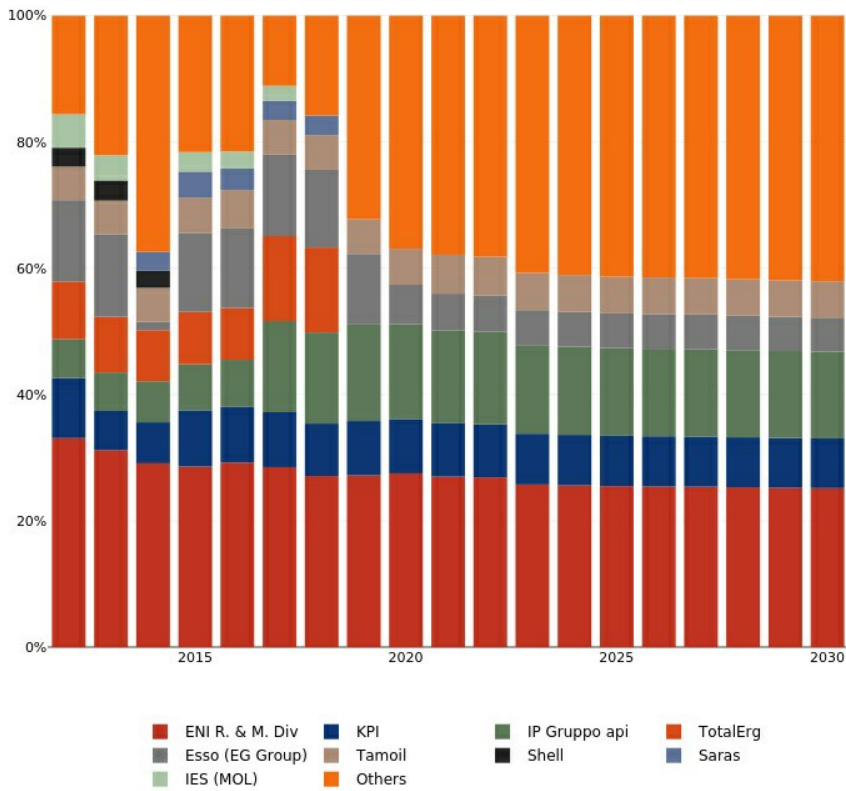
Italy Diesel Retail Market Share



Source: Stratas Advisors, 2022

**LPG Market Share by Brand**

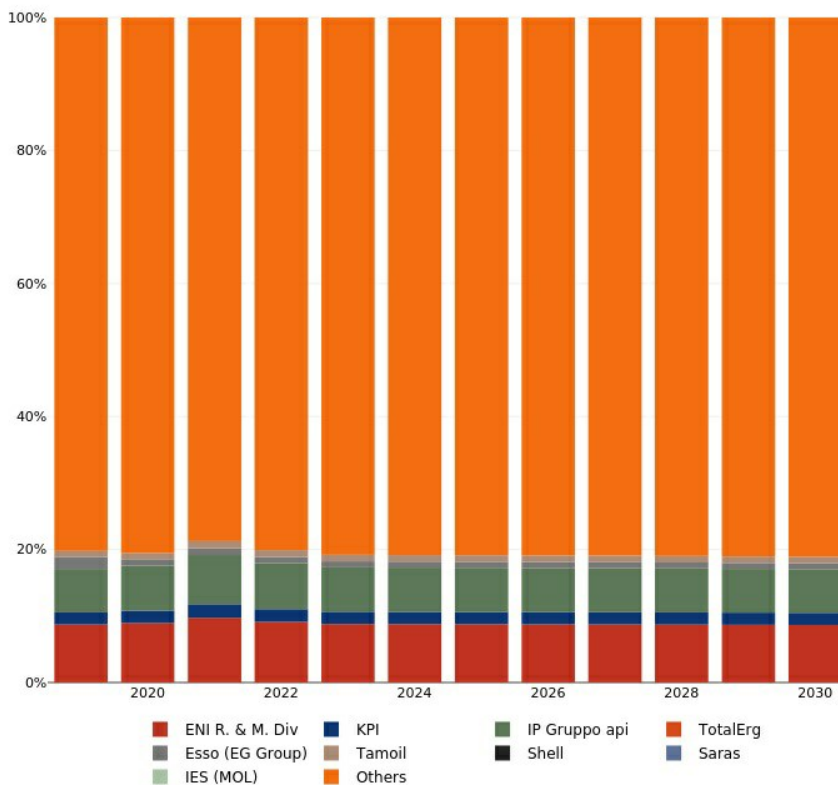
Italy LPG Retail Market Share



Source: Stratas Advisors, 2022

**CNG Market Share by Brand**

Italy CNG Retail Market Share

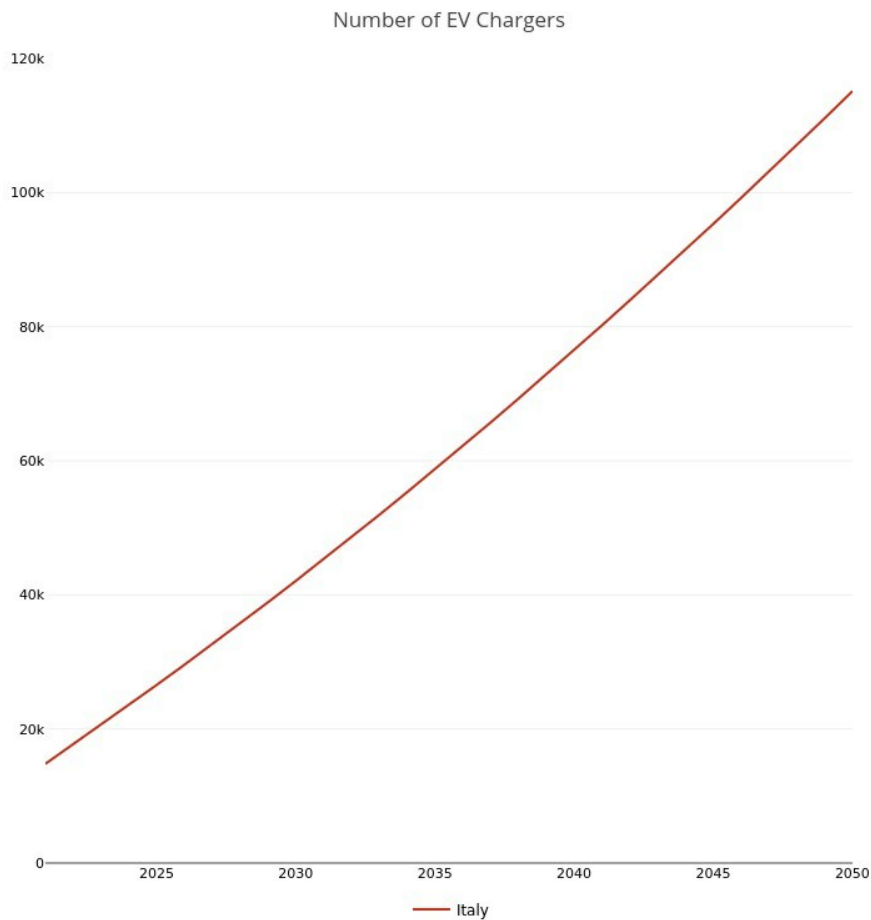


Source: Stratas Advisors, 2022

**EVs**

The National Recovery and Resilience Plan (NRRP), also known as Italia Domani, has set goals of building the infrastructure necessary to promote the development of electric mobility, increasing the number of zero-emission vehicles (public and private) and reducing the environmental impact of transport. This would be achieved by creating more than 20,000 fast charging points on highways and urban centers by 2026 with different types of services installed, including 175kW for highways and 90kW for urban areas. Italy is on well track to meet the 2026 target with more than 15,000 EV charging points installed currently.

**EV Infrastructure Database**

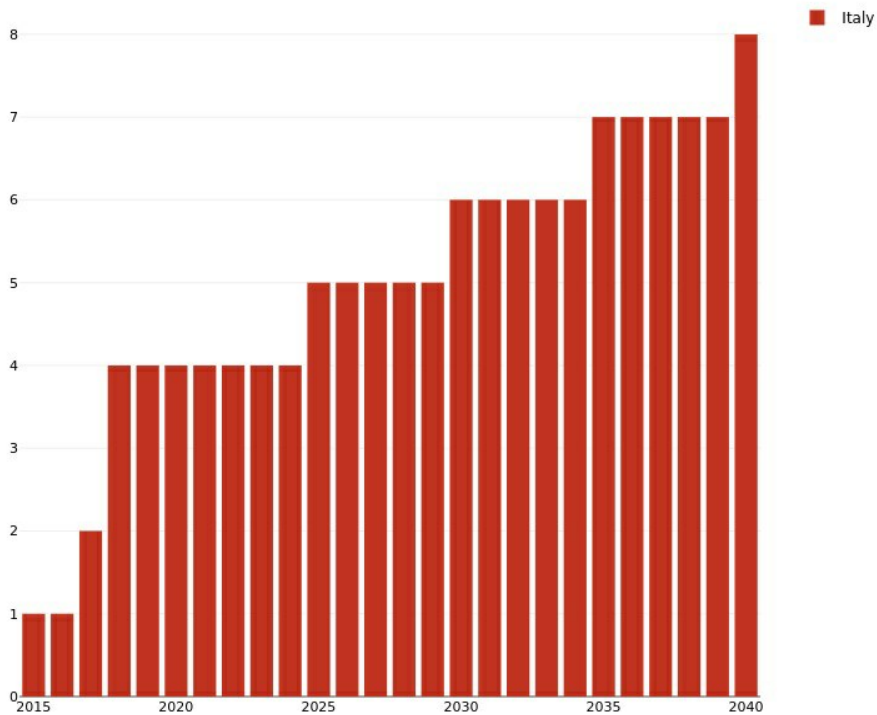


Source: *Stratas Advisors, March 2021*

**Hydrogen**

Italia Domani also set a goal to increase the penetration of hydrogen in road transport, promoting the creation of distributors for trucks and cars and reaching at least 5-7% of the internal market within 2030. By June 2026, at least 40 charging stations working under the pressure of over 700 bars are planned to be developed giving priority to strategic areas for heavy road transport along highways, close to ports and near logistical terminals. Currently, ENI operates one of the hydrogen stations, while others are operated by independent businesses.

**Hydrogen Refueling Stations Database**



Source: *Stratas Advisors, May 2021*

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