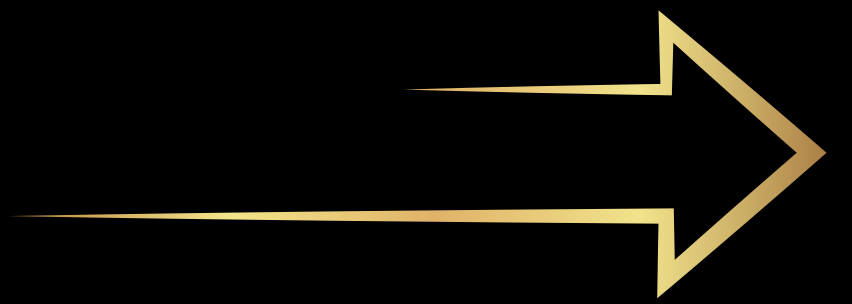


**top 50
Indies**
2021
FORECOURTtrader

50

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TOP 50
INDEPENDENT
PETROL
RETAILERS**



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Resilience during a challenging year



Welcome to the latest Top 50 Indies report and an update on the UK's biggest independent forecourt operators.

Who could have known that since our last report the world would face such huge challenges in the year to come? However, the fact that forecourts were designated as 'essential businesses' has seen them play a vital role in keeping the country running with food and fuel and their role in everyday lives elevated to new

levels. The efforts of many top independents was highlighted as they kept certain facilities open for key workers, provided free food and drinks, and offered help and support for the community through charitable campaigns and setting up home delivery services.

Despite drastic volume falls in the core business of selling fuel, overall the industry has survived and shown what it is capable of. Retailers have also seen a glimpse of the future on the 'road to zero' and confirmed in which direction they could be heading – affirming the development of grocery, foodservice and additional services. The sector has proved its resilience with many drawing up plans for expansion and site investment when restrictions are lifted.

As usual the criteria we have used to compile the order of the list encompasses the following factors: primarily, the all-important number of sites owned or operated; followed by the annual fuel volume; then the annual turnover of the business. Where retailers with the same number of sites have declined to include fuel volume or turnover figures, they have been ranked in alphabetical order. The qualification criteria has also been adjusted – see page 7 for details in the Top 50 Indies review.

Meanwhile, many thanks to everyone who has helped in the compilation of this report, by submitting information; also many thanks to James Haigh of Experian Catalist; PRA chairman Brian Madderson; and Steve Rodell of Christie & Co for their invaluable assistance.

M. Boulton

Merril Boulton: Editor
Report compiled by John Wood: Assistant Editor



Top 50 at a glance

2021 RANK & change	COMPANY NAME
1 → 1	Motor Fuel Ltd
2 → 2	EG Group Ltd
3 → 3	Rontec Roadside Retail Ltd
4 → 4	Applegreen
5 → 5	Penny Petroleum Group
6 → 6	SGN Ltd
7 ↑ 9	Ascona Group
8 ↓ 9	Park Garage Group plc
9 ↓ 26	Moto Hospitality
10 ↑ 10	Platinum Retail Group
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12 → 12	The Kay Group (UK) Ltd
13 → 13	Karan Retail Ltd
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15 ↓ 14	The Brookfield Group
16 ↑ 21	Grove Retail Ltd
17 ↓ 15	Valli Forecourts
18 ↑ 19	Highway Stops Retail Ltd

2021 RANK & change	COMPANY NAME
19 ↑ 20	Sewell on the go
20 ↑ 22	Hills Group
21 ↑ 23	Falcon Sharma Group
22 ↑ 25	JP&S Services Ltd
23 ↑ 24	AY&Y Patel
24 ↑ 26	SV Petroleum Ltd
25 ↑ 31	DK Forecourts Ltd
26 ↑ 27	Petrocell Holdings Ltd
27 ↑ 29	Majid & Sons/U&I Fuel
28 → 28	Intake Developments Ltd
29 ↑ 32	Jos Richardson & Son Ltd
30 ↑ 33	Elite Garages
31 ↑ 34	Pearl Forecourts Ltd
32 ↑ 36	AKV Garages UK Ltd
33 NEW	Tankerford Ltd
34 ↑ 35	Refuel & Go
35 ↓ 30	AK Fuel Ltd
36 ↑ 37	WJ King Garages

2021 RANK & change	COMPANY NAME
37 ↑ 39	Westmorland Ltd
38 ↓ 18	M&L Richardson & Sons Ltd
39 ↓ 17	Arms Group Ltd
40 NEW	Gardner Garages Ltd
41 NEW	Hockenhull Garages Ltd
42 ↓ 40	SK Fuel
43 ↓ 41	Sood Enterprises
44 ↓ 42	George Hammond plc
45 ↓ 43	Nowell Forecourts Ltd
46 → 46	Niza Superstores (Eastbourne)
47 ↑ 49	Krisco Services Group
48 ↓ 44	Fraser's Retail Ltd
49 ↓ 47	Midland Motor Fuels Ltd
50 ↓ 48	Kilrea Service Station Ltd

KEY
 ↑ Up on last year
 ↓ Down on last year
 → Same as last year
 NEW New entry this year

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Top 50 Indies review 2021

Like most business sectors in the UK forecourts have been severely challenged over the past year by dealing with the effects of Covid-19. Lockdowns and other restrictions meant that fuel volumes were well down for many Top 50 members. For some, improved shop sales and higher fuel margins went some way to compensate during the first lockdown, but many in the Top 50 report that as restrictions ramped up again during the autumn and winter, shop sales did not show the same resilience as earlier.

However, the good news is that despite many reporting turnover down on the previous year all the Top 50 Indies survived the year, with some even completing acquisitions while

many are drawing up plans on how to invest in their sites and expand their businesses as and when customers are able to return.

Overall the number of sites owned and operated by the Top 50 Indies has continued to grow and now stands at 2,417, compared with 2,360 last year. This is despite a stricter interpretation of the rules for inclusion which has seen a handful of sites discounted. If sites are operated, the company must be in charge of fuel supplies to qualify, so Shell clusters sites do not count.

Perhaps because of the depressed market there has been less volatility in the Top 50 this year, with just three new entries. Tankerford joined the list, and is ranked 33, Gardner Garages has

moved up to 40th place having been bubbling under last year, and the current Forecourt Trader of the Year, Hockenhull Garages, has made it in and is ranked 41st. They replace two former Top 50 members who were swallowed up by bigger rivals, and one who just slipped down into the Bubbling Under category. MFG acquired AUK, which was ranked 45th last year with six sites while KSC Worldwide, which had been ranked 38th with eight sites, sold seven sites to Certas Energy with the eighth going to fifth-ranked Penny Petroleum. Exelby Services, which was ranked 50th last year, shifts a huge fuel volume, but as rankings are based on site numbers it just missed the cut this year.

With more than twice as many



sites as its nearest rival it was no surprise to see MFG hold onto the top spot, and with the acquisitions of AUK, and of sites from BP, it ended the year with a net gain of eight.

It had seemed that its nearest rival, EG Group, was concentrating on the rapid expansion of its overseas interests, with its UK arm becoming the minnow of the group, even though it had an impressive pipeline of new-to-industry sites in the pipeline, which enabled it to open 13 new sites in the past year. But then its owners had an audacious bid for Asda accepted, and did a £750m deal for EG Group to buy Asda's forecourt business. If Asda's 320 forecourts were added to EG Group's UK total it would still be well short of MFG in forecourt numbers, but fuel volumes could be another matter.

Moving down the list, Rontec and Applegreen are firmly in third and fourth position and acquisitive Penny Petroleum steadily increased its estate to 70 sites to hold on to fifth place. SGN disposed of a number of sites but its additions were greater and it ended the year with a net gain of four at 62, and held onto sixth position. Ascona moved up to seventh position after a net gain of 12 sites and says it has funding in place to double its estate.

With the number of sites being put up for sale far outnumbered by demand, and the pandemic dampening the market, there were fewer acquisitions than previous years, and no company outside the Top 10 has increased its site numbers by more than two over the past year. With many Top 50 owners keen to expand their businesses some are turning to developing new-to-industry sites, or redeveloping former petrol station sites that have long been redundant. At the top of the list MFG acquired nine new-to-industry sites from BP and, as mentioned above, Euro Garages opened 13 new sites. But Kay Group and Hockenhull Garages also managed to open new sites despite the pandemic and Kay Group and Brookfield Group have more planned, while Valli Forecourts will be bringing a long-redundant site back into use.

Many other Top 50 members have plans to redevelop existing sites, with most seeking to extend the amount of



Some Top 50 members are adding EV chargers but others feel it is too early to commit

retail space and to expand their food-to-go offering. Most sites now offer hot beverages – and in most cases this is Costa Coffee – and sandwiches, but many are becoming far more adventurous with other food and drink franchises such as Greggs, Subway, and McDonald's, and others baking their own pizzas. With demand for deliveries fuelled by the lockdown companies are also hooking up with services such as Deliveroo, Just Eats and Uber Eats.

In addition to food-to-go, entrepreneurial retailers are also seeking to provide more services for customers to bring in additional revenue and generate extra footfall, with an increasing number of Post Offices and even laundrettes appearing on forecourts.



New entry: Award winner Hockenhull Garages

EV chargers are also appearing on Top 50 forecourts but many owners are reluctant to make the commitment while EV uptake is still so low.

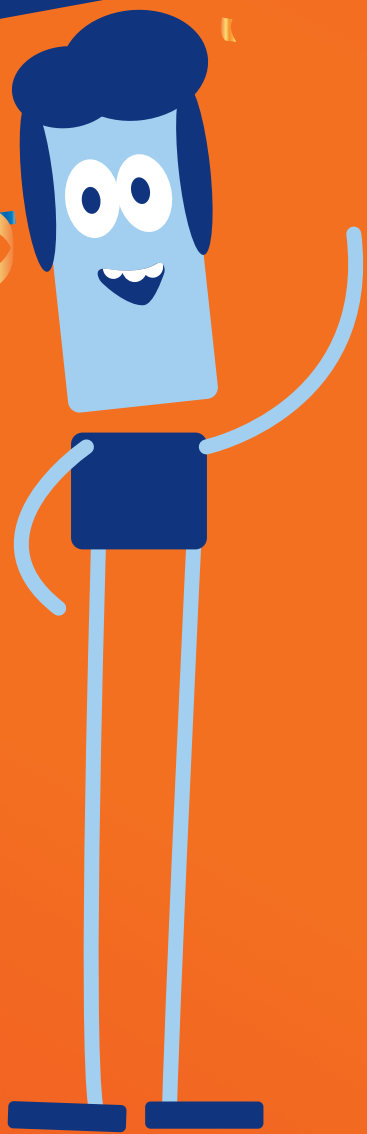
The vast majority of the Top 50 are also members of symbol groups such as Spar, Londis, Budgens and Nisa, appreciating the supply chain and marketing benefits they can bring to their stores. Meanwhile the supermarkets are represented with Morrisons at Rontec and MPK sites, and Asda being trialled at EG Group sites. Sainsbury's also has a trial with EG Group, but EG Group's close relationship with Asda may deter Sainsbury's from extending it.

Looking ahead to the rest of 2021 Top 50 members have a lot of strong foundations to build on if and when Covid-19 restrictions are eased. During the lockdown many consumers discovered local shops on forecourts could cater for a lot more of their needs than they expected. There is also an appreciation of how forecourts maintained, and often extended, their service to their local communities. Entrepreneurial Top 50 members seeking to invest in and expand their businesses are likely to find plenty of goodwill and take-up from their customers.



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1 **Motor Fuel Ltd** →

With its 911-strong network, MFG is the UK's leading independent forecourt operator and with its ambitious 2021 shop development, food to go and drive-thru programmes, MFG aims to be the most dynamic player in the forecourt market sector.

MFG is confident that it now has the strongest retail team in the sector and the company's desire to grow the retail performance across its estate will be essential to its development programme.

This will include improving the forecourt and shop offer to customers, while at the same time, providing greater support to MFG contract managers throughout the network.

Maintaining a strong fuel and valeting offer continues to be core to the business and this will be supported with increased forecourt capital expenditure, of which a significant part will be a planned roll-out of new EV charging hubs across the network.

MFG will also continue to develop its Murco brand in the dealer market. A strong brand identity together with an improved range of fuel supply packages are available.

These should become more competitive, reliable and flexible given the range and fuel buying power of the MFG business.

- **Site numbers:** 911 company owned, 175 dealer operated
- **Fuel volume:** 4.5blpa
- **Turnover:** £5bn
- **Shop turnover:** £580m (company stations)
- **Fuel brands:** BP, Shell, Esso, Texaco, Jet, Murco
- **HQ:** St Albans, Hertfordshire
- **Directors:** William Bannister, chief executive officer; Tom Biggart, chief investment officer; Jeremy Clarke, chief operating officer; Simon Lane, chief financial officer

MFG kept up its record of buying fellow Top 50 members when in December it announced its acquisition of six sites in the Lake District owned by AUK Investments.

The sites comprised three BP-branded and three Shell-branded stations. MFG said it planned to improve the shop offer for customers and introduce a food-to-go option where appropriate to help ensure the sites become a destination for both the local community and visiting tourists. AUK Investments was ranked 45th in last year's Top 50.

Early this year it added more sites to its estate with an agreement to purchase seven operational stations and nine new-to-industry (NTI) sites from BP. This was part of a wider deal that included re-signing 64 MFG sites to BP and converting 36 more to the BP brand. Six of the operating stations are in Scotland and one is located in Surrey. The NTI sites are spread throughout England and Scotland.

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2 →

EG Group Ltd

- **Site numbers:** EG Group owns and operates 396 company owned, company operated (COCO) sites in the UK. Overall it owns 5,643 forecourts across 10 international markets (UK, Ireland, France, Belgium, Netherlands, Luxembourg, Germany, Italy, US and Australia), of these, 3,523 are COCO sites
- **Fuel volume:** UK 1.23blpa; EG Group 18.1blpa
- **Turnover:** UK €2.0bn (£1.7bn); EG Group revenue is €18.2bn (£15.8bn)
- **Shop turnover:** Grocery & Merchandise UK revenue €289m (£251m); EG Group €4.3bn (£3.7bn). Foodservice UK revenue €203m (£177m); EG Group €452m (£393m)
- **Fuel brands:** Esso, BP, Shell, Texaco
- **HQ:** Blackburn, Lancashire
- **Directors:** Zuber Issa, founder and Co-CEO; Mohsin Issa, founder and Co-CEO; Michael Hughes, group chief financial officer; Ilyas Munshi, group commercial director; Imraan Patel, group general counsel and company secretary; Salim Hasan, group chief operating officer; Graham Billsborough, group chief information officer

In the UK, EG Group extended its foodservice offer by introducing SBarro pizzas and Cinnabon baked goods at site locations.

This year has also seen the trial of Asda on the Move grocery and merchandise stores.

Furthermore, EG Group undertook and completed 13 new-to-industry developments and six knock-down rebuilds along with thirty-three KFC restaurant refreshes.



3 →

Rontec Roadside Retail Ltd

- **Site numbers:** 260
- **Fuel volume:** 1.1blpa
- **Turnover:** £1.1bn (ex VAT)
- **Shop turnover:** n/a (belong to commission operators)
- **Fuel brands:** BP, Esso, Shell, Texaco
- **HQ:** Watford, Hertfordshire
- **Directors:** Gerald Ronson, chairman and chief executive; Giles Taylor, managing director; Nick Lowe, operations director; Tom Cookson, fuels and IT director; Tracy Moloney, finance director; Michelle Levett, retail director.

This list excludes non-executive directors

While the Covid-19 pandemic had a major impact on the company's operations it was able to adapt to the continually changing circumstances to ensure it was able to continue to serve its customers in a safe environment with a minimum of disruption in product supply.

The pandemic also accelerated the shift to on-line shopping and home deliveries and during the year Rontec concluded deals with Amazon, Deliveroo, Uber Eats and Just Eats to fulfil these needs.

Rontec's charitable efforts continued with Pennies, resulting in a further £310,000 being raised for the company's nominated charities.



4 →

Petrogas Group UK Ltd t/a Applegreen

- **Site numbers:** 113*
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Applegreen, Low Fuel Prices Always, BP
- **HQ:** Amptill, Bedfordshire
- **Directors:** Bob Etchingham, CEO; Joe Barrett, COO; Niall Dolan CFO

Applegreen UK added one site to its portfolio in 2020. This was on the A40 in Ross on Wye, Wales.

The company also continued its focus on expanding its food-to-go offering adding five more Greggs and continued to invest in upgrading its own brand, grab and go, across a number of sites.

The fast-tracking of digital platforms for home delivery, click and collect etc, was a feature driven by Covid-19 and is an area that Applegreen will continue to grow across its business as consumer trends and behaviours continue to change.

Hermes parcel collection and Amazon lockers were also added to a number of sites to cater for the demand in online shopping.

The focus for 2021 will be to make acquisitions on a selective basis, and continue to grow the business with particular focus on food to go.

* Applegreen's parent company owns a majority stake in Welcome Break, but has not included its forecourts in this number.

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5 →

Penny Petroleum Group

- **Site numbers:** 70 company owned and operated by Penny Petroleum
- **Fuel volume:** 150mlpa (120 mlpa retail/ 30 mlpa bunker)
- **Turnover:** £200m (inc VAT, exc bunkering)
- **Shop turnover:** £40m
- **Fuel brands:** BP, Essar, Esso, Gulf, Jet, Murco, Shell, Texaco
- **HQ:** Alnwick, Northumberland
- **Directors:** David Penny, Louise Penny

Through the course of what has been a challenging year for the industry, Penny Petroleum has been able to adapt the business quickly to meet market expectations.

It acquired eight new sites through the year in England and Wales as well as carrying out four major forecourt developments and nine shop re-fits, giving it the opportunity to further maximise the convenience sector that became its strength during much of 2020.

It continued with its plan to maximise its valeting proposition and has subsequently installed six new roll overs and a number of additional jet washes.

Now operating with Spar (CJ Lang and Blakemore), Londis and Premier across the estate, its wholesale supply remains strong. It will continue to analyse shop brand throughout 2021 to further strengthen its position.

Once again it will be looking to expand its portfolio of sites in 2021.



6 →

SGN Ltd

- **Site numbers:** 62 owned of which 51 operated
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Esso, Jet, Shell, Texaco
- **HQ:** Dunmow, Essex
- **Directors:** Graham Peacock, Susan Tobbell, Paul Courtney, Matt Copland

The business has been resilient throughout the pandemic, citing a great team and site effort.

Focus on service and evolving the retail offer has been at the heart of the challenging year

Eight new sites opened including four sites in Scotland, and nine further sites have been refurbished including the introduction of SGN's own Pitstop food-to-go brand and kitchen concept.

Six non-trading sites have been sold.

Costcutter has been added to SGN's shop providers and a Bargain Booze store is being trialled at one site

More than 30 launderettes have been added to the network alongside over 50 parcel collection points.



7 ↑

Ascona Group

- **Site numbers:** 57 all owned
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Esso, Gulf, Jet, Shell, Texaco
- **HQ:** Dunmow, Essex
- **Directors:** Darren Briggs, managing director; Duncan Morris, property director; Shane Higgon, finance director

Ascona again achieved significant growth in 2020, despite the challenges of the Covid pandemic.

Acquisitions have continued as planned and at a high rate with little or no impact felt from the difficulties of lockdown. Site development has only been minimally impacted by the pandemic with 2021 seeing the first of a number of planned redevelopments commencing.

Ascona has completed various shop developments and valeting installations in the period with more planned for 2021. The plan for the current year is an acceleration of the growth achieved over the past year with the addition of new sites and a heavy investment program to refurbish and upgrade existing sites.

In January Ascona Group revealed it had secured financial backing from Crestline Europe and Nash Business Capital to more than double its existing portfolio to 120 sites in 2021.



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8 ↓

Park Garage Group plc

- **Site numbers:** 50 owned
- **Fuel volume:** 183mlpa
- **Turnover:** £157m
- **Shop turnover:** £34m
- **Fuel brands:** BP, Shell, Texaco
- **HQ:** Hayes, Kent
- **Directors:** Balraj Tandon, Sunil Tandon, Hemant Tandon, Manoj Tandon

Park Garage Group plc has had a turbulent year like most businesses in the UK.

PGG saw a decrease in fuel volumes but an uplift in shop sales. Categories such as coal and gas and grocery saw record sales and take home/multipack products increased in popularity.

Once again, car valeting sales saw further growth over the last 12 months. PGG has re-invested more money in improved jet wash facilities, which have seen instant success.

In March 2020, PGG welcomed Manoj Tandon into the business. Manoj joined PGG with a background in accountancy and finance. Hemant and Manoj will take PGG into its third generation of the business and continue its growth.

PGG acquired two sites in 2020 at Park Harborne and Park Herringthorpe, branded Texaco and BP respectively.

In July 2020, PGG converted seven sites to Shell and has already seen an increase in both V-Power grades. PGG installed new pumps in five sites with all grades being available on each pump.



9 ↓

Moto Hospitality

- **Site numbers:** 47
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Non-fuel turnover:** n/d
- **Fuel brands:** BP
- **HQ:** Toddington, Bedfordshire
- **Directors:** Ken McMeikan

In July Moto took an industry-leading move to trial lower fuel prices at selected sites, directly addressing customer concerns over fuel costs on the motorway.

Pret joined the Moto family, and BP extended its partnership with Moto, meaning all sites now accept Keyfuel cards.

Moto Rugby is scheduled to open in spring 2021, with a full service offering including, food court, indoor play and retail units.

Moto has traversed the Covid landscape by responding and reacting to customer feedback quickly, as highlighted by Transport Focus which commended Moto for its communications during the pandemic.

In February 2021 Moto and BP revealed they had re-signed a fuel supply agreement covering all of Moto's UK locations and an annual volume in excess of 400 million litres.

Hanna Hofer, BP's newly appointed VP, operations and dealers, UK, commented: "Moto's UK-wide network coverage is important to our fleet customers, and their 'Think Customer' value supports our aspiration to create a differentiated customer experience."



10 ↑

Platinum Retail Group

- **Site numbers:** 31 owned
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Shell, Texaco
- **HQ:** Rickmansworth, Hertfordshire
- **Directors:** Sej Sejjal, L K Sejjal

2020 has been a very unusual and challenging year due to the pandemic.

There was a lot of uncertainty at the start, but Sej Sejjal believes the fuel/convenience sector has come out not too badly impacted.

He foresees more challenges ahead, but feel that it has given a lot of groups like his time to take stock and make the necessary changes and to move forward in a positive way.

Platinum continues to seek the right opportunities that are the right fit for its operational model and where it can add value with its food and convenience offer. It continues to look for different ways to enhance its offer and look for new ways to keep its offer fresh.

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11 ↓
Stratford Retail Group Limited/MPK Garages Limited

- **Site numbers:** 29
- **Fuel volume:** over 70mlpa
- **Turnover:** £102m
- **Shop turnover:** over £20m
- **Fuel brands:** Essar, Texaco
- **HQ:** Leicester
- **Directors:** Nerissa Haskic, Paul Kershaw, John Stewart

MPK Garages signed a three-year contract with Europump Maintenance for pump and tank gauge maintenance services in November 2020.

The deal will see Europump support MPK's network of 29 sites across the UK with reactive and preventative fuelling equipment maintenance.

12 →
The Kay Group (UK Holdings) Ltd t/a The Kay Group (UK) Ltd

- **Site numbers:** 22 owned (20 operated, 2 leased out)
- **Fuel volume:** 86.1mlpa (84.6mlpa retail, 1.5mlpa HGV)
- **Turnover:** £114.42m
- **Shop turnover:** £25.3m
- **Fuel brands:** BP, Shell, Texaco
- **HQ:** Blackburn, Lancashire
- **Directors:** Ken Kay, chief executive officer; Ashley Kay, CEO designate; Paul Blackmore, non-executive chairman; Richard Cox, managing director; Simon Fielding, finance director

The group has secured four further NTI locations. Three are in with planning, and the other one, Beighton, situated just off the M1 on the A57 towards Sheffield, opened in September.

13 →
Karan Retail Ltd

- **Site numbers:** 18
- **Fuel volume:** 46mlpa
- **Turnover:** £49m
- **Shop turnover:** £5m
- **Fuel brands:** BP, Esso, Jet, Shell, Texaco
- **HQ:** Coventry
- **Directors:** Sivasubramaniam Karan

Karan Retail is now working with five major fuel brands, and for its retail offer it is planning to have Londis, Costcutter and its own branded forecourt shop.

The company is looking to increase the number of sites that offer food to go. It is in talks with Starbucks, Greggs and other fast-food outlets, with the aim of adding them to some of its forecourt sites as well as standalone fast-food outlets such as pizza vending machines.

Four sites are currently undergoing major refits, which will see the retail area become larger, and one of its BP sites will be completely rebuilt.

14 ↑
NTS Group

- **Site numbers:** 16
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Esso, Jet, Texaco
- **HQ:** New Malden
- **Directors:** Thayaparan Nalliah

NTS has acquired two sites in the past 12 months (one each in Q1 2020 and Q1 2021).

The new site added in 2020 has been significantly developed, increasing the shop footprint by half and thereby allowing NTS to offer a wider product range and service offering. During the past year four of its sites rebranded with BP and two sites with Jet.

Heading into 2021 NTS continues to be on the acquisition trail in addition to continuing to develop and maximise its existing portfolio and product mix.

15 ↓
The Brookfield Group

- **Site numbers:** 16
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Shell
- **HQ:** Dewsbury, West Yorkshire
- **Directors:** Aziz Patel, Raj Patel

During 2020 The Brookfield Group acquired further plots for petrol filling station and roadside uses.

New construction of a site in Hull started in November and is due to complete in spring 2021.

The company is due to start a new fast-food franchise on one of the two drive-thrus it received planning permission for in East Yorkshire.

A programme of shop refits is under way on existing sites as the group continues to add food-to-go to its estate.

It is also planning to start adding solar panels and EV chargers to sites.

16 ↑
Grove Retail Ltd

- **Site numbers:** 15 sites owned
- **Fuel volume:** 43.3mlpa
- **Turnover:** £46.4m
- **Shop turnover:** £7m
- **Fuel brands:** BP, Esso, Shell
- **HQ:** New Cross, London
- **Directors:** C Chelvam

During 2020 the group redeveloped the forecourts and refitted the shops at two sites. It also switched its Jet sites to supply by BP, and also moved some of its Texaco sites to BP.

Other developments included installing new launderette machines at several sites, new pumps were installed at two sites and several sites were upgraded with TLM pos.



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17

Valli Forecourts

- **Site numbers:** 15
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Shell
- **HQ:** Leeds, West Yorkshire
- **Directors:** Farook Valli, Haroon Valli

The group has been regularly upgrading sites, introducing new pumps and revamping shops.

Trading during the pandemic has been “challenging” with fuel sales depressed, and while shops sales were up during the first lockdown there has not been a similar increase as restrictions increased again at the end of the year.

This year the company has started redeveloping a former petrol filling station site that had been closed for more than 20 years, and hopes to open it in May.

18

Highway Stops Retail Ltd

- **Site numbers:** 13 (11 owned, 2 long-term investment sites)
- **Fuel volume:** 44mlpa
- **Turnover:** £56m
- **Shop turnover:** n/d
- **Fuel brands:** BP (11), Esso (1), Gulf (1)
- **HQ:** Wembley, Middlesex
- **Directors:** Sharad Raja (managing director), Shilan Raja, Tony Head

Operationally it has been a very tough year with the challenges brought on by the pandemic although site staff worked with dedication and pride which saw an uplift in shop sales serving the community.

Development of the Astwick Service Area was completed which included five HGV lanes, shop extension, EV charging bays and a Costa Coffee drive-thru. Planning permission was also granted for an 83-apartment residential development on its Greenford Park site.

19

Sewell on the go

- **Site numbers:** 13
- **Fuel volume:** 40mlpa
- **Turnover:** £50m
- **Shop turnover:** £16m
- **Fuel brands:** BP
- **HQ:** Hull, East Yorkshire
- **Directors:** Patrick Sewell, managing director; David Craven-Jones, operations director; Katherine Batch, sales director; Alex Mortimer, finance director

Following the temporary closure of its Subway stores in late March to comply with the coronavirus regulations, Sewell on the go joined up with another local family run company to offer fresh fruit and vegetables to its local communities.

When the Subway stores had to close the Sewell team decided to utilise the space by joining forces with fruit and veg supplier Coyle & Sons.

20

Hills Group

- **Site numbers:** 12
- **Fuel volume:** 36mlpa
- **Turnover:** n/a
- **Shop turnover:** £13.1m
- **Fuel brands:** BP
- **HQ:** Carlisle, Cumbria
- **Directors:** David Hill (managing director), Michael Collin, Michael Gatty

Covid restrictions during the year caused a substantial downturn in sales of fuel, and although sales at the Spar stores on the group’s 12 forecourts initially held up they have also slowed recently.

In store the group introduced a number of Covid precautions such as screens at tills, one-way systems, hand sanitisers at entrances and limits on the number of customers.

The group has bought land next to its Wigton site and plans to build a 3,000sq ft Spar store when conditions allow.

21

Falcon Sharma Group

- **Site numbers:** 12
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Esso, Gulf, Jet
- **HQ:** Watling Street, Staffordshire
- **Directors:** Tariq Iqbal, Kumar Sharma, Rakesh Sharma

In 2020 the group introduced Adblue pumps across its sites.

More state-of-the art touchless car washes (no brushes) were added and a four-in-one machine offering, vacuum, air freshener, sanitiser and screenwash has been introduced.

All the machines on the forecourts are going to be converted to be contactless in response to strong customer demand.

The group is planning to introduce a new bake-and-take concept in the stores on its forecourts.

22

JP&S Services Ltd

- **Site numbers:** 11
- **Fuel volume:** 56.1mlpa
- **Turnover:** £56m
- **Shop turnover:** £12.8m
- **Fuel brands:** Texaco (7), Jet (3), BP (BP site will change to Jet in March)
- **HQ:** Wembley, Middlesex
- **Directors:** Mr and Mrs Yoganathan

2020 has been a busy but challenging year for JP&S Services Ltd.

Highlights include: purchase of the Hertford Road Service Station in January 2021; demolition and redevelopment of Horton Heath Service Station; new canopy and pumps installed at College Park Service Station; new pumps installed at Scrubs Lane and Weyhill Service Stations; and plans for full redevelopment of Tilthams and Hertford Road Service Stations in early 2021.



23 ↑

AY&Y Patel

- **Site numbers:** 11 owned (9 operated, 2 leased out)
- **Fuel volume:** 45mlpa
- **Turnover:** £40m
- **Shop turnover:** £12m
- **Fuel brands:** BP(1), Esso (2), Shell (7), Texaco (1)
- **HQ:** Dewsbury, West Yorkshire
- **Directors:** Yakub Patel, Yunus Patel, Ahmed Patel, Asif Patel, Hanif Patel

Last year the company carried out knock-down rebuilds (KDRB) at two of its service stations.

This year it is about to start a KDRB at its forecourt on Leeds Road, Bradford, and it is working on plans for a second KDRB later in the year.

During 2020 the company also installed electric vehicle chargers at two sites and is looking at provision for chargers at other sites when the demand is there.

24 ↑

SV Petroleum Ltd

- **Site numbers:** 10 (5 owned, 5 operated)
- **Fuel volume:** 54.9mlpa (33.9mlpa owned, 21mlpa operated)
- **Turnover:** £70m
- **Shop turnover:** £14.1m
- **Fuel brands:** BP, Jet, Gulf
- **HQ:** Dagenham, Essex
- **Directors:** Murugupillai Gopalakrishnan, chairman; Arunasalam Nagendra, chief executive officer; Mahendran Selvarajan, gm operations

Last year the company introduced Booker Premier to some of its forecourt stores and during the coming year it intends to move the rest of its stores over to the group.

This year SV Petroleum management would like to introduce electric chargers on its forecourts and they are currently looking at the options.

They also intend to invest in their shops.

25 ↑

DK Forecourts Ltd

- **Site numbers:** 10
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Esso, Gulf, Texaco
- **HQ:** Cwmbran Gwent
- **Directors:** Kurt Williams, Scott Williams

It has been an ambivalent year where DK has seen a decline in fuel sales, but strong growth in shop categories such as alcohol, fresh food, and groceries as shopping habits changed and customers shopped local.

The company has expanded its food-to-go offering and carried out some small refreshes in store. It also reviewed its ranges to bring them in line with Covid/lockdown buying trends. Additionally it has invested heavily in valeting with new airlines, jet washes and rollover car washes.

29 ↑

Jos Richardson & Son Ltd

- **Site numbers:** 9 sites (8 owned plus 1 NTI leasehold)
- **Fuel volume:** 60mlpa
- **Turnover:** £52m
- **Shop turnover:** £14m
- **Fuel brands:** BP, Gulf, Jet, Shell
- **HQ:** Selby North Yorkshire
- **Directors:** Joseph Richardson, Jane Richardson, Karen Marshall, Graham Andrews

Despite the challenges of 2020, the company continued with its planned opening of a forecourt in Leeds, West Yorkshire, at a newly developed motorway services area.

While retail fuel and shop sales are being severely hampered by the pandemic, initial HGV volumes are encouraging. During the year, the company strengthened its relationship with Shell, taking a further two sites across to the brand when re-signing.

30 ↑

Elite Garages

- **Site numbers:** 9 sites all owned
- **Fuel volume:** 31mlpa
- **Turnover:** £58m
- **Shop turnover:** £8.5m
- **Fuel brands:** Texaco
- **HQ:** Horsham, West Sussex
- **Directors:** Richard Whittemore

A new shop refit at the group's Redruth site, which was purchased in 2019, has helped to double shop turnover at this location.

During the year the company also completed the installation of ATC pumps at all of its locations.

It is now actively looking for more site acquisitions.

31 ↑

Pearl Forecourts Ltd

- **Site numbers:** 9 sites all owned
- **Fuel volume:** 30mlpa
- **Turnover:** £36m
- **Shop turnover:** n/d
- **Fuel brands:** Esso, Shell
- **HQ:** Bolton, Lancashire
- **Directors:** Hanif Mohamed

Last year Pearl re-pumped two of its sites bringing the number of sites with new equipment to seven within five years.

In addition it overhauled and completely refurbished two forecourt stores, one of which switched to Spar branding.

Pearl Forecourts is always on the lookout for potential acquisitions and is in the market to buy a number of sites, or a similar size forecourt operator to itself, in order to double the size of the business.

26 ↑

Petrocell Holdings Ltd

- **Site numbers:** 10
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Gulf (9), Jet (1)
- **HQ:** Croydon, Surrey
- **Directors:** Dermot Dowling, chairman; John Dowling, managing director; Elaine Read, finance director; Pat Dowling, operations director

Fuel volumes have been down this year due to the pandemic but this has been compensated by stronger store sales and improved fuel margins.

27 ↑

Majid & Sons Service Stations Ltd/U&I Fuel

- **Site numbers:** 10
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Texaco, Jet, Murco, Shell
- **HQ:** Reading, Berkshire (Majid & Sons), Stadhampton, Oxfordshire (U&I Fuels)
- **Directors:** Abdul Majid, Tariq Majid (Majid & Sons), Mohammed Farooq, Farida Farooq (U&I Fuels)

Covid-19 restrictions hit the business hard with fuel volumes down by about 50% and shop sales also down by about 20%. Plans by the company to invest in the estate have been put on hold until the market stabilises, but they will look to continue developing the business when the conditions have improved.

28 →

Intake Developments Ltd

- **Site numbers:** 10
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Jet
- **HQ:** Barnsley, South Yorkshire
- **Directors:** Robert Campbell, Richard Campbell, Fiona Campbell

32 ↑

AKV Garages UK Ltd

- **Site numbers:** 9 (owned)
- **Fuel volume:** 30mlpa
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP, Jet, Shell
- **HQ:** Boston, Lincolnshire
- **Directors:** Vaseeharan Puvanasingham, AK Vaseeharan

The company was hit hard by the pandemic with volume down 40% compared with the previous year.

However, after the success of its first new-to-industry site at Sutterton roundabout in Lincolnshire, AKV Garages is working towards opening its second new-to-industry site in 2022.

33 NEW

Tankerford Ltd

- **Site numbers:** 9 (owned)
- **Fuel volume:** n/d
- **Turnover:** £18.3m
- **Shop turnover:** n/d
- **Fuel brands:** BP, Texaco
- **HQ:** Godalming, Surrey
- **Directors:** Ghayethiry Nanthakumar, Subramaniam Nanthakumar

During the company's last financial year to July 31 2020 it acquired five forecourt sites: Tattenham Corner in Epsom, Ardleigh Service Station 1 and 2 in Colchester, All Saints Service Station in Portsmouth, and its first site in the north of England, Whinmoor Service Station in Leeds.

The company carried out significant improvements to all the sites.

During the first lockdown there was a significant drop in fuel sales but this was compensated by increased margins and by the shops seeing increased sales.

34 ↑

Refuel & Go

- **Site numbers:** 9 owned (7 operated, 2 leased out)
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP
- **HQ:** Tilford, Surrey
- **Directors:** Lance Trevellyan, Lewis Trevellyan

The company continued to upgrade the customer experience with further store and forecourt investment and launched Deliveroo at three sites and a home delivery service at one site.

Refuel & Go has signed up with Ecologi to offset the carbon footprint of its employees through tree planting and carbon offsetting.

The company has also received planning permission to redevelop its Bethnal Green site for a new seven-storey 157-bedroom hotel scheme.

35 ↓

AK Fuel Ltd

- **Site numbers:** 9 owned
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Esso, Texaco (8)
- **HQ:** Rochdale, Lancashire
- **Directors:** Rifat Karim, Muhammad Ajmal Dar

The company has one fewer sites than last year after ownership of one was transferred to a family member.

During 2020 the company has started installing F'real milkshake and Costa coffee at its sites and intends to roll them out across the estate in 2021.

Plans to refit stores were put on hold due to the pandemic and it is hoped they can be carried out this year.

Installing Amazon boxes has helped to increase footfall at sites.

36 ↑

WJ King Garages

- **Site numbers:** 8
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Harvest
- **HQ:** Dartford, Kent
- **Directors:** John King (managing director), Jane Atkins, William King

WJ King Garages' current five-year deal with Harvest Energy for fuel supply and branding covering all of its fuel operations is due to end in mid-2021.

The company has 17 car dealership sites stretching across south-east London, and north-east Kent, selling seven brands: Cupra, Dacia, Kia, Peugeot, Seat, Suzuki and Vauxhall.

The eight fuel forecourts are each situated alongside one of the company's car dealership sites. The company has been introducing pay-at-pump facilities and now has OPTs at seven sites.

37 ↑

Westmorland Ltd / Gloucestershire Gateway Ltd

- **Site numbers:** 7 owned
- **Fuel volume:** 29.151mlpa
- **Turnover:** £92.3m
- **Shop turnover:** £4.4m
- **Fuel brands:** Esso (5), Shell (1), Unbranded (Esso fuel supplied) (1)
- **HQ:** Penrith, Cumbria
- **Directors:** Sarah Dunning, chairman; Laurence King, vice-chairman; Jane Lane, non-executive director; Bryan Mark Gray, non-executive director; Nabil Subuh, CEO

41 NEW

Hockenhull Garages Ltd

- **Site numbers:** 12 (7 owned, 5 commission operated)
- **Fuel volume:** 12.2mlpa (8.8mlpa owned, 34.3mlpa operated)
- **Turnover:** £24.2m
- **Shop turnover:** £6.7m (owned £2.3m, operated £4.4m)
- **Fuel brands:** BP, Gulf, Shell
- **HQ:** Leicester
- **Directors:** Peter Hockenhull, CEO; Joe Hockenhull, managing director; Robert Spooner, operations director

The company won the Forecourt Trader of the Year award for The Stage, the largest development in its history and which opened during the pandemic.

Hockenhull Garages also began the year with an acquisition and a new partnership with Gulf. In 2021 it will be looking to continue to grow, largely in food service, and looking for quality acquisitions rather than quantity.

42 ↓

SK Fuel

- **Site numbers:** 7 all owned
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Jet
- **HQ:** Doncaster, South Yorkshire
- **Directors:** Suleman Patel

38 ↓

M&L Richardson & Sons Ltd

- **Site numbers:** 13 (7 owned/6 commission operated)
- **Fuel volume:** 22mlpa owned/29mlpa operated
- **Turnover:** £33m
- **Shop turnover:** £8.5m owned /£3.9m operated
- **Fuel brands:** BP, Esso, Shell
- **HQ:** Brampton, Cumbria
- **Directors:** Martyn Richardson, David Richardson, Paul Richardson, Kevin Richardson

During 2020 the company carried out two shop refits and purchased a standalone convenience store.

Fuel volumes were impacted by Covid but shop sales benefited. In 2021 the company plans to re-pump one forecourt and refit the newly acquired convenience store.

39 ↓

Arms Group Ltd

- **Site numbers:** 7 all owned
- **Fuel volume:** 24mlpa
- **Turnover:** £30m
- **Shop turnover:** £6m
- **Fuel brands:** BP, Esso, Shell
- **HQ:** Liverpool
- **Directors:** Reece Patel

As with many companies in the forecourt sector, fuel sales have been affected by the pandemic, but turnover in the shops was up compared with the previous year.

During the year senior management in the business remained the same but it was restructured so Arms Group replaced Raiscorp Ltd.

This year the company is in the planning stage for shop refurbishments, and will be looking into introducing more food to go and services. It is also considering acquisitions and is hoping to increase number of sites this year.

40 NEW

Gardner Garages Ltd

- **Site numbers:** 7 owned
- **Fuel volume:** 22.6mlpa
- **Turnover:** Forecast £30m pa
- **Shop turnover:** £10.5m
- **Fuel brands:** BP, Texaco
- **HQ:** Cheltenham, Gloucestershire
- **Directors:** Clive Gardner, Stella Gardner, Emma Gardner, Ashton Gardner

This year will see another BP forecourt added to the group.

The car and jet wash facility on the new site will be upgraded and a new shop partner will be trialled.

The award-winning Salisbury site will see the addition of two new jet wash bays as will the Huntley forecourt, both subject to planning.

The company intends to extend one forecourt shop and knock down and rebuild another. It has also opened a standalone up-market convenience store on Cheltenham Promenade.

43 ↓

Sood Enterprises

- **Site numbers:** 7
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** BP
- **HQ:** Glasgow
- **Directors:** Raman Sood (managing director), Shivani Sood,

In July 2018 Sood Enterprises secured a £3m funding package from Bank of Scotland to invest in its portfolio of sites.

The business, which operates seven petrol stations – six across the west coast of Scotland and one in Fife – is also now owned by a family trust after a management buyout. In addition to a major upgrade of fixtures, fittings, equipment and technology to improve the customer experience, the investment programme involved installation of Subway outlets.

44 ↓

George Hammond plc

- **Site numbers:** 6
- **Fuel volume:** 38mlpa (retail and bunker)
- **Group turnover:** £39.7m
- **Forecourt shop turnover:** £12.7m
- **Fuel brands:** BP
- **HQ:** Dover, Kent
- **Directors:** John Ryeland

In spite of the challenges of fuel sales during Covid, particularly in Dover with the loss of international tourist traffic, the business, and shops in particular, performed well.

The strength of wholesale support with brand partners Co-op and Spar brand and local suppliers ensured stores had full shelves enabling them to support the local communities.

One highlight was the support for local fruit grower Edward Vinson farms where over 32,000 punnets of strawberries and 6,000 of raspberries (nearly 14 tonnes) were sold.

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45 ↓

Nowell Forecourts Ltd

- **Site numbers:** 6
- **Fuel volume:** 32mlpa (retail 25mlpa, bunkering 7mlpa)
- **Turnover:** £32m
- **Shop turnover:** £7m
- **Fuel brands:** BP, Shell
- **HQ:** Leeds, West Yorkshire
- **Directors:** Umerji Moosa Patel, Nizam Patel, Mubarak Patel

This year the company is planning a major site development/extension at one of its sites.

Last year the company completed moving all its sites to the Spar brand with Blakemore. It also re-signed five sites with BP on a new deal.

46 →

Niza Superstores (Eastbourne) Ltd, Niza Southwater Ltd, Niza Forecourt Ltd

- **Site numbers:** 6 (5 owned / 1 operated)
- **Fuel volume:** 27mlpa (26mlpa owned / 1mlpa operated)
- **Group turnover:** £70m
- **Forecourt shop turnover:** £7.2m
- **Fuel brands:** Texaco
- **HQ:** Sutton, Surrey
- **Directors:** Visvanathan Ragnathan

Covid-19 has affected fuel sales, which are down by nearly 50% of the normal level. However, shop sales have increased by 15%.

47 ↑

Krisco Services Group

- **Site numbers:** 6 (5 operated, 1 investment)
- **Fuel volume:** 22mlpa
- **Turnover:** £40m
- **Shop turnover:** £8m
- **Fuel brands:** BP, Esso
- **HQ:** Reading, Berkshire
- **Directors:** Kris Navaratnam, Soma Satha

During 2020 fuel sales were depressed by the pandemic, but shop sales were up on the previous year.

During the year the group carried out a complete redevelopment of its site in Burbage, Wiltshire, and added a Post Office at the location.

Over the same period it also sold two sites. This year it is planning to invest in upgrading all of its locations.

48 ↓

Fraser's Retail Ltd

- **Site numbers:** 6 - 5 owned/operated and 1 leased out
- **Fuel volume:** 21mlpa
- **Turnover:** £40.37m
- **Shop turnover:** £11.87m
- **Fuel brands:** BP
- **HQ:** Didcot, Oxfordshire
- **Directors:** Hugh Fraser, Robert Fraser, Jonathan Fraser and Nick Fraser

Although challenging operationally, 2020 was a successful year for the company.

The directors felt very fortunate to be in a business that could not only stay open, but one that could also thrive in such challenging times.

The plan for the next year and in future is to continue to invest in the current stores as well as diversifying into other areas of retail.

49 ↓

Midland Motor Fuels Ltd

- **Site numbers:** 6 (5 owned, 1 leased)
- **Fuel volume:** 16.5mlpa
- **Turnover:** in excess of £17m
- **Shop turnover:** £7.9m
- **Fuel brands:** Esso, Texaco, Essar
- **HQ:** Erdington, Birmingham
- **Directors:** Shailesh Parekh, Hamaben Parekh

The company is finalising the purchase of its leased site and will then seek to modernise it with a knock-down rebuild (KDRB).

Last year it completed the purchase of the other site that it leased and it is in the final stages of obtaining planning permission for a KDRB.

The plans include a restaurant on the first floor and the intention is to offer a fusion of Italian, Indian and English food, and this concept may act as a model for the company's other sites.

50 ↓

Kilrea Service Station Ltd

- **Site numbers:** 6 (4 owned, 2 leased)
- **Fuel volume:** 13mlpa (owned 9.1mlpa, leased 3.9mlpa)
- **Turnover:** £28m (excluding Paypoint and lottery)
- **Shop turnover:** £15m
- **Fuel brands:** Maxol (4), BP (2)
- **HQ:** Coleraine, County Londonderry
- **Directors:** Kenny Bradley

During 2020 the company received planning approval for a complete knockdown and rebuild of its head office site in Kilrea.

It is planning to start redevelopment in the second quarter of 2021 and it will take eight months to complete.

The site is currently a Maxol forecourt with a Spar convenience store and two retail units (takeaway and off licence). The new complex will have all offers under one roof with offices on the first floor.

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Exelby Services Ltd

- **Site numbers:** 5 sites owned & operated
- **Fuel volume:** 137mlpa (24mlpa retail, 113mlpa bunkering)
- **Turnover:** £43m
- **Shop turnover:** £6.4m
- **Fuel brands:** Shell
- **HQ:** Northallerton, North Yorkshire
- **Directors:** Rob Exelby, Michael Exelby

Rusdene Services Ltd

- **Site numbers:** 5
- **Fuel volume:** 15mlpa
- **Turnover:** circa £26m
- **Shop turnover:** £8m
- **Fuel brands:** BP
- **HQ:** Droxford, Hampshire
- **Directors:** Oli Lodge, Derek Lodge, Paul Lodge

John Thomas & Sons (Aberaeron) Ltd

- **Site numbers:** 5
- **Fuel volume:** n/d
- **Turnover:** n/d
- **Shop turnover:** n/d
- **Fuel brands:** Texaco
- **HQ:** Aberaeron, Dyfed
- **Directors:** Clive Thomas, John Thomas, Lewis Thomas, Susan Thomas

Oil companies which also own and operate an estate of forecourt sites

Shell UK Oil Products

- **HQ:** London
- **Forecourt numbers:** 540

BP Oil UK Ltd

- **HQ:** Milton Keynes
- **Forecourt numbers:** 326

Esso Petroleum

- **HQ:** Leatherhead, Surrey
- **Forecourt numbers:** 197

Harvest Energy

- **HQ:** London
- **Forecourt numbers:** 90

Certas Energy

- **HQ:** Warrington, Cheshire
- **Forecourt numbers:** 84

Maxol Oil Ltd

- **HQ:** Newtownabbey, Co Antrim
- **Forecourt numbers:** 33

Highland Fuels Ltd

- **HQ:** Invesness
- **Forecourt numbers:** 15

Gleaner Ltd

- **HQ:** Milnfield, Elgin
- **Forecourt numbers:** 13

Local Fuel

- **HQ:** Shoreham, West Sussex
- **Forecourt numbers:** 12

Jet Retail UK

- **HQ:** London
- **Forecourt numbers:** 11

Oil4Wales

- **HQ:** Llangain, Carmarthen
- **Forecourt numbers:** 3



Multi-site forecourt operators whose core business is not fuel

Henderson Retail Ltd

- **HQ:** Newtonabbey, Co Antrim
- **Forecourt numbers:** 73
- **Fuel brands:** BP, Circle K, Emo, Jet, Maxol, Texaco

James Hall

- **HQ:** Preston, Lancashire
- **Forecourt numbers:** 40
- **Fuel brands:** Shell, Texaco

Central England Co-op

- **HQ:** Lichfield, Staffordshire
- **Forecourt numbers:** 20
- **Fuel brands:** Co-op own brand

Central Convenience Stores

- **HQ:** Crewe, Cheshire
- **Forecourt numbers:** 20
- **Fuel brands:** Texaco

Blakemore Retail

- **HQ:** Willenhall, West Midlands
- **Forecourt numbers:** 17
- **Fuel brands:** BP, Jet, Shell, Texaco

Mid Counties Co-op

- **HQ:** Warwick
- **Forecourt numbers:** 9
- **Fuel brands:** Texaco, Co-op own brand

Lincolnshire Co-op

- **HQ:** Lincoln
- **Forecourt numbers:** 7
- **Fuel brands:** Gulf

Appleby Westward

- **HQ:** Saltash, Cornwall
- **Forecourt numbers:** 2
- **Fuel brands:** Texaco

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