



# **FUELS MARKET STUDY**

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# 1. OBJECTIVES AND SCOPE OF THE STUDY

*The study distinguishes **three issues** relevant for the consumer experience in the vehicle fuels market:*

***Issue 1:*** *Consumer information on vehicle fuels;*

***Issue 2:*** *Consumer understanding and decision making;*

***Issue 3:*** *Single Market choice, price and quality for consumers.*

## 2 . CONSUMER SURVEY KEY FINDINGS

*The survey focused specifically on the issues of:*

- Consumer usage of vehicle fuels;
- Perception and understanding of fuel labelling;
- Fuel purchases and decision making;
- Perception of 'premium' and biofuels;
- Choice of petrol station and fuel type.

## 2.1 Vehicle usage and fuel costs

*Over half (**56%**) of respondents **drove a medium sized car**;*

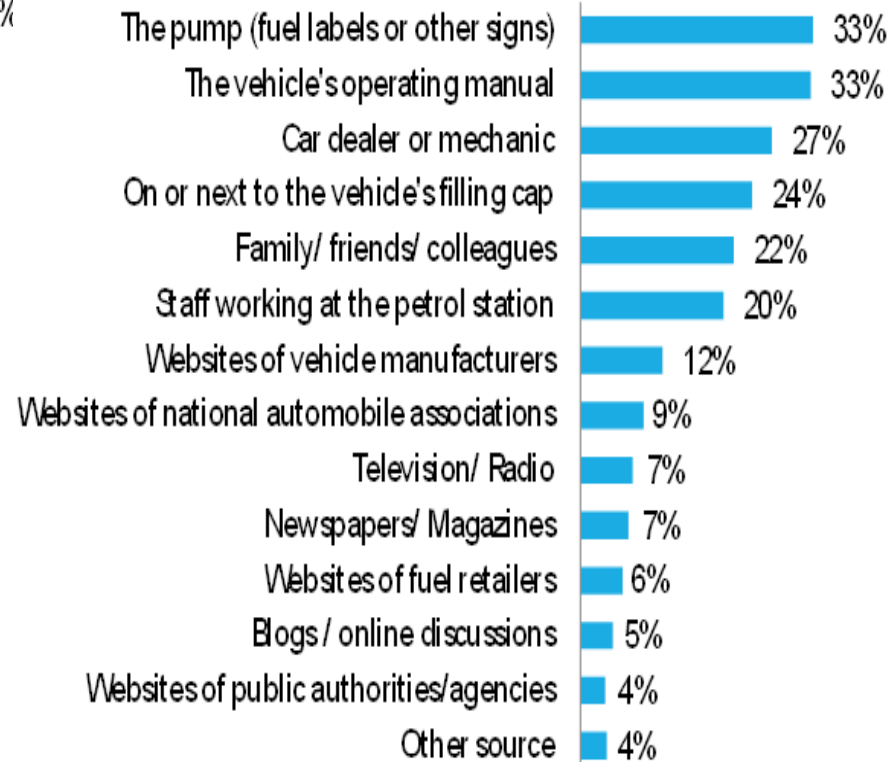
*Around a third (**35%**) said their **vehicle is less than five years old**, only a few drive a new car less than one year old;*

*Around half (**48%**) **drive less than 10,000 km/year**;*

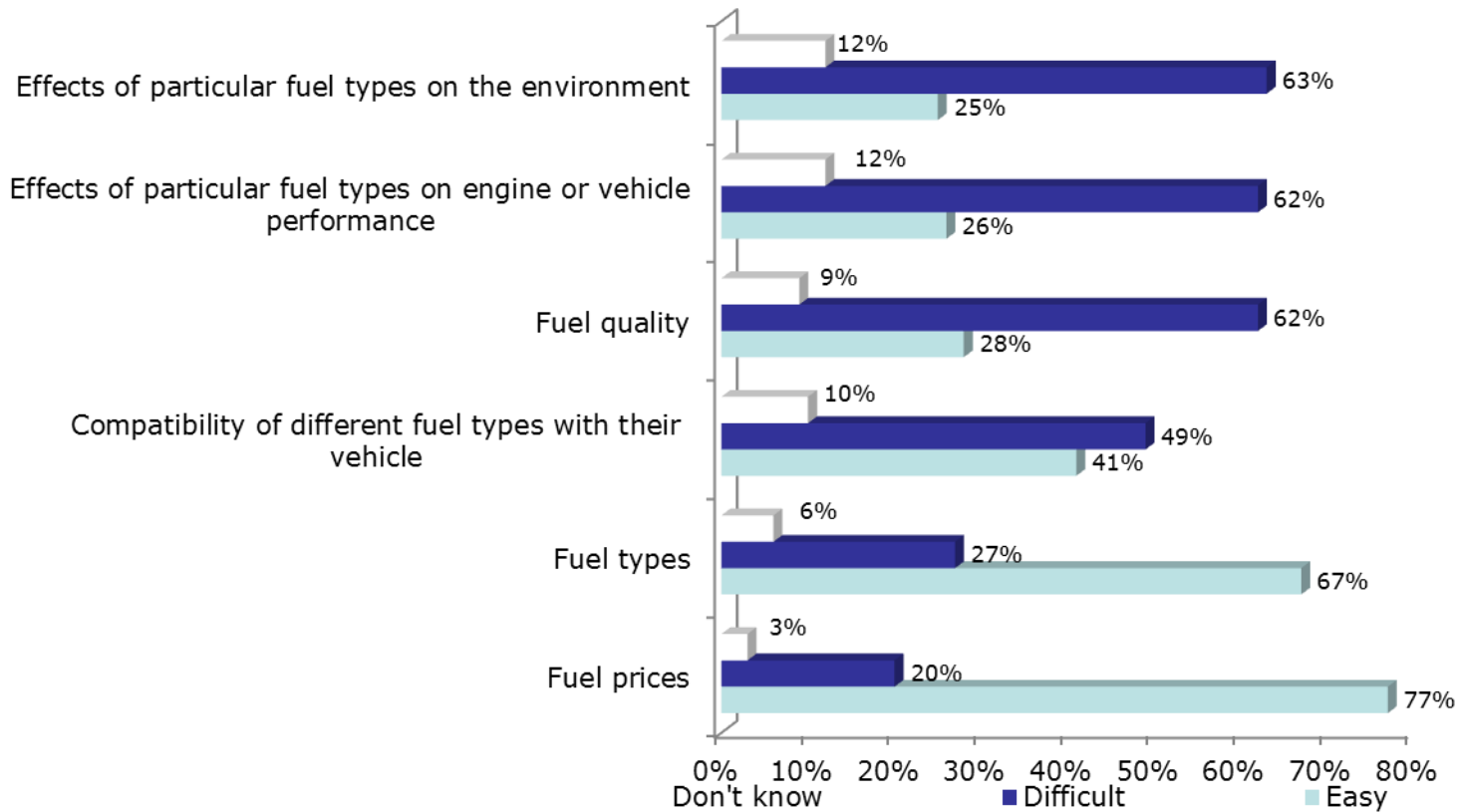
*Over eight in ten (**85%**) paid for the vehicle fuel bought in the previous 12 months;*

*On average, **9%** of monthly **income** is spent on **fuel**.*

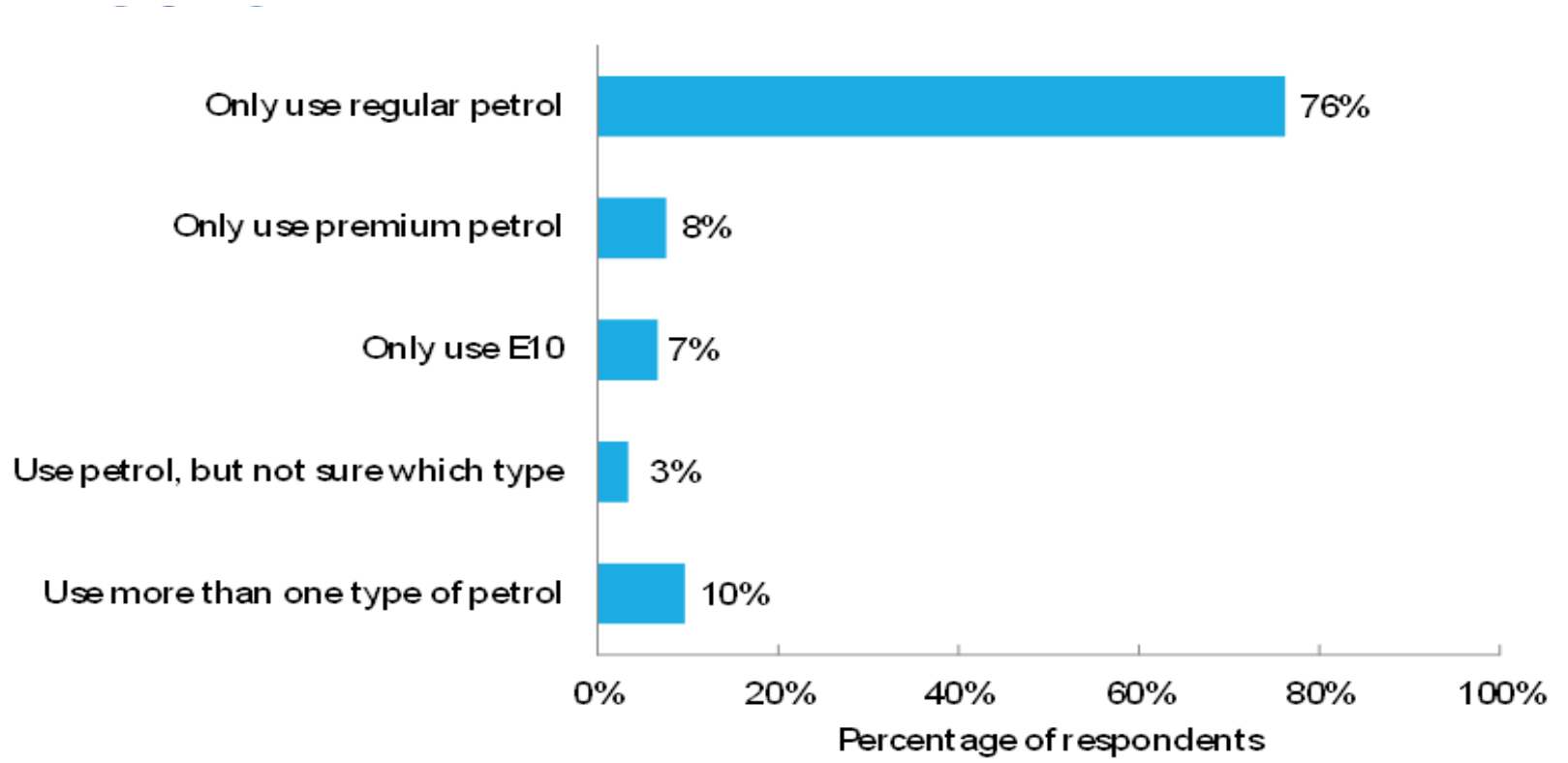
## 2.2 Information sources



## 2.2.2 Availability and clarity of information

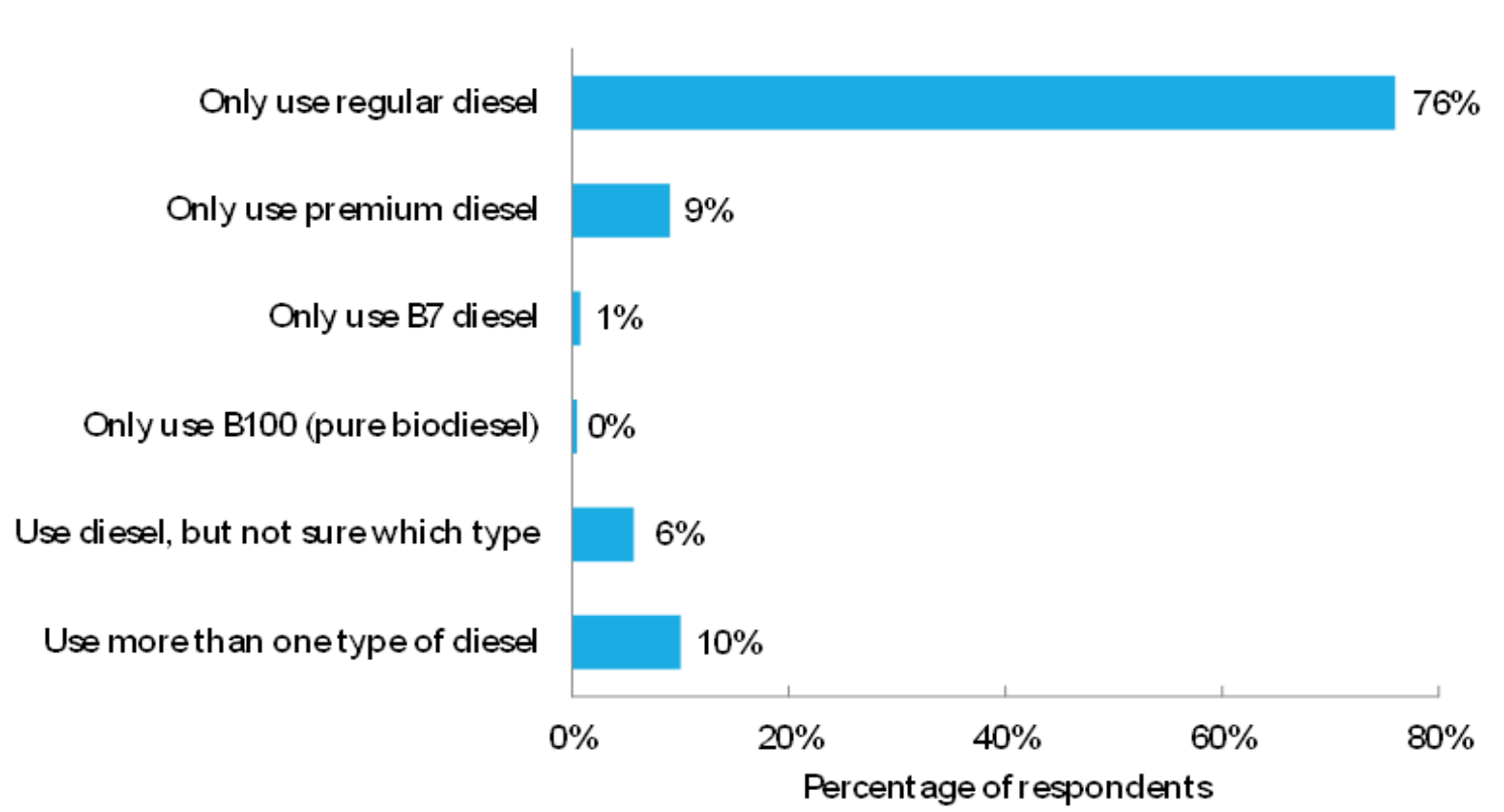


## 2.3 Preferred fuel types: Petrol

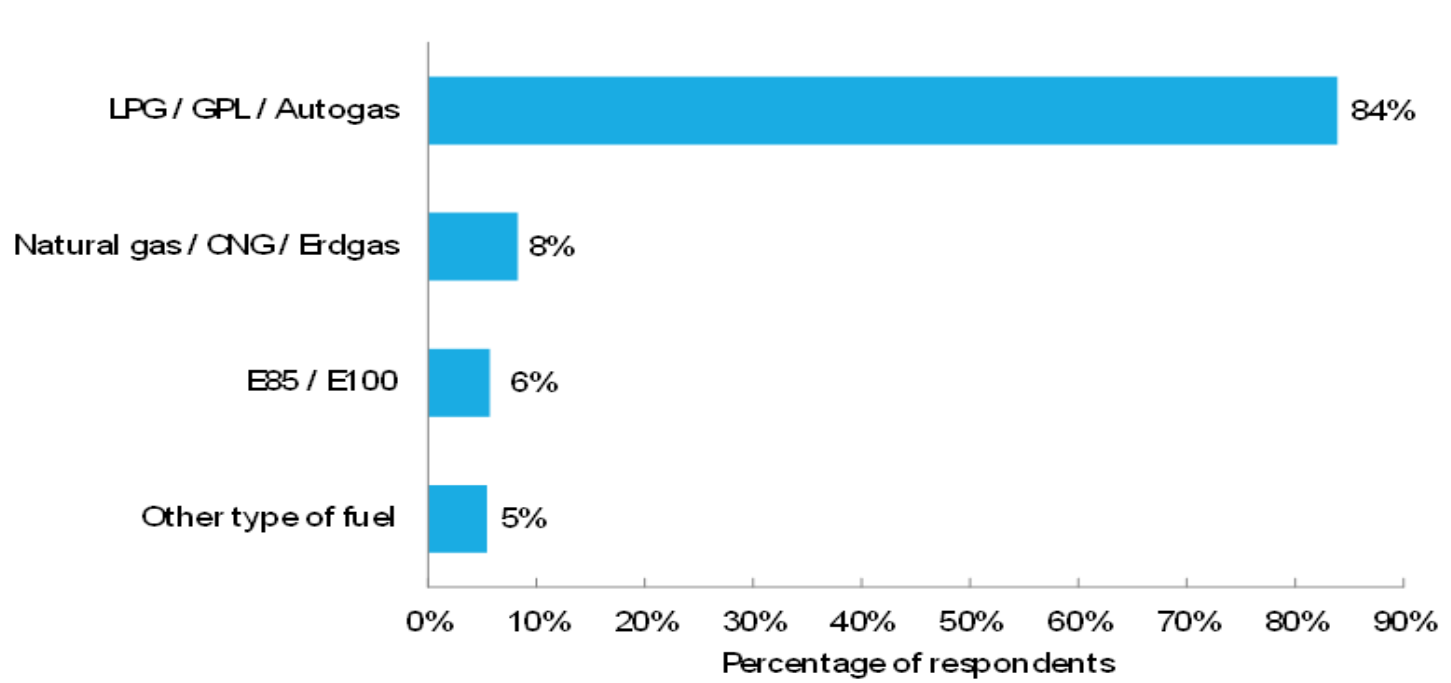




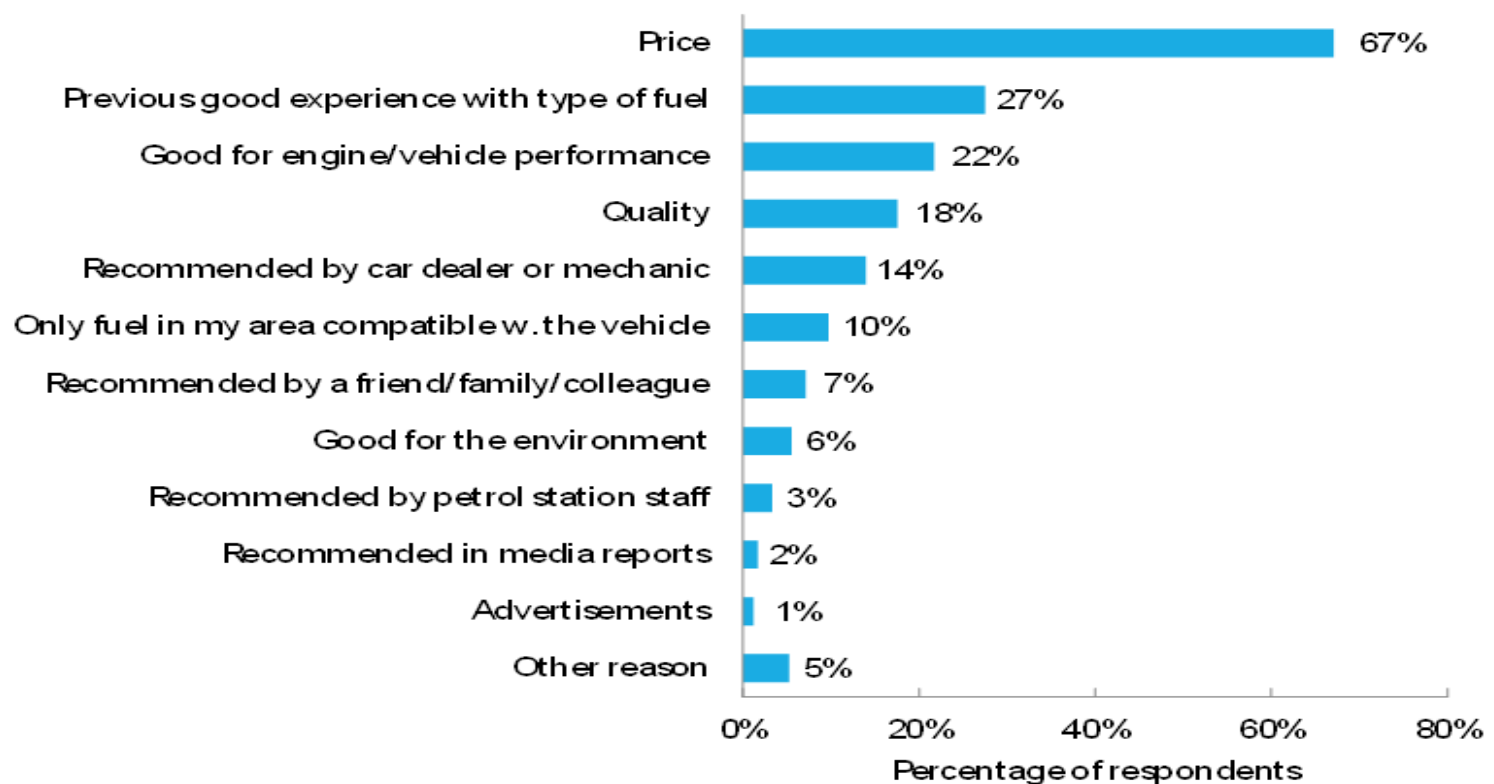
## 2.4 Preferred fuel types: Diesel users



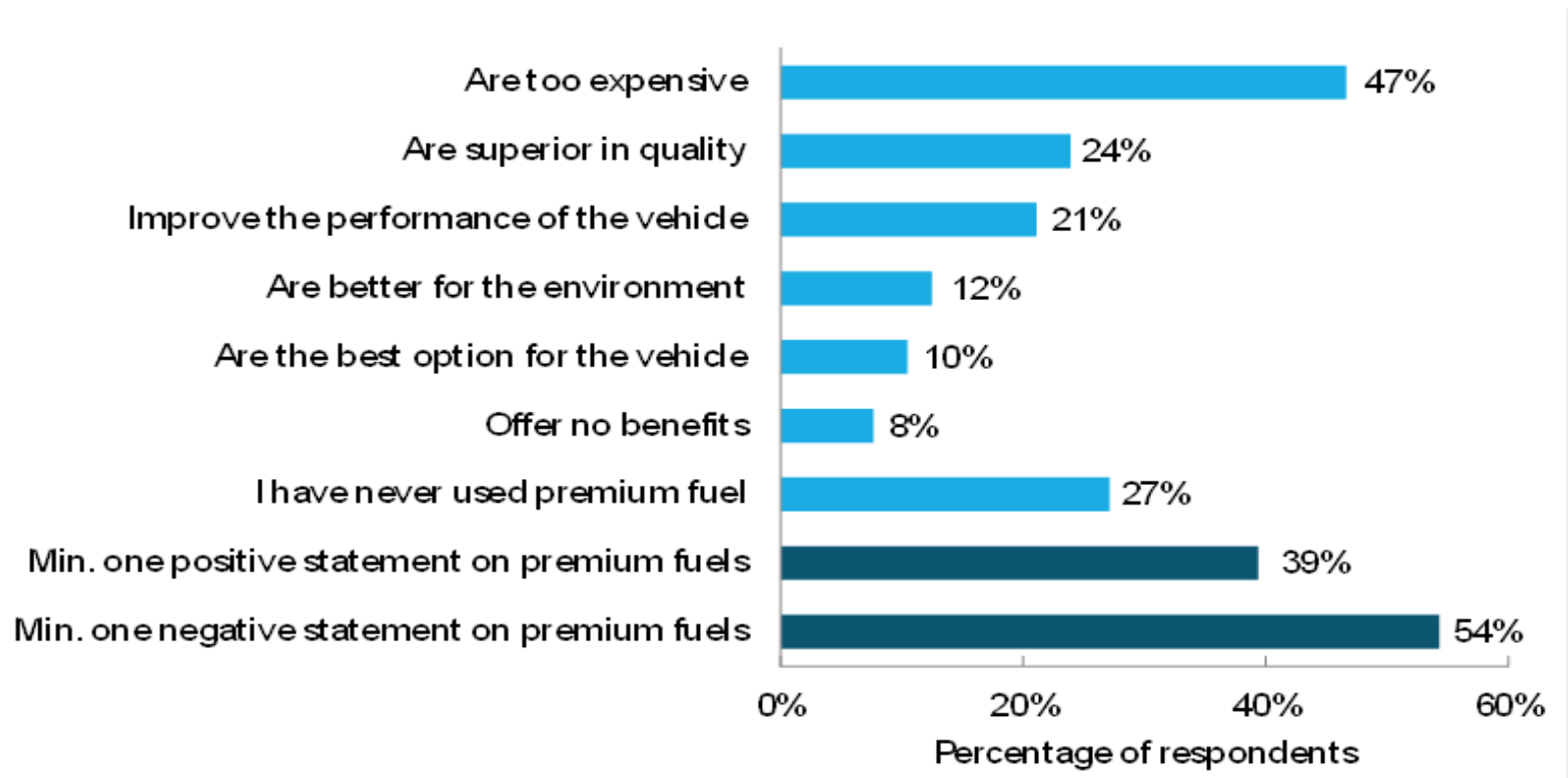
## 2.5 Preferred fuel types: Other types of fuel



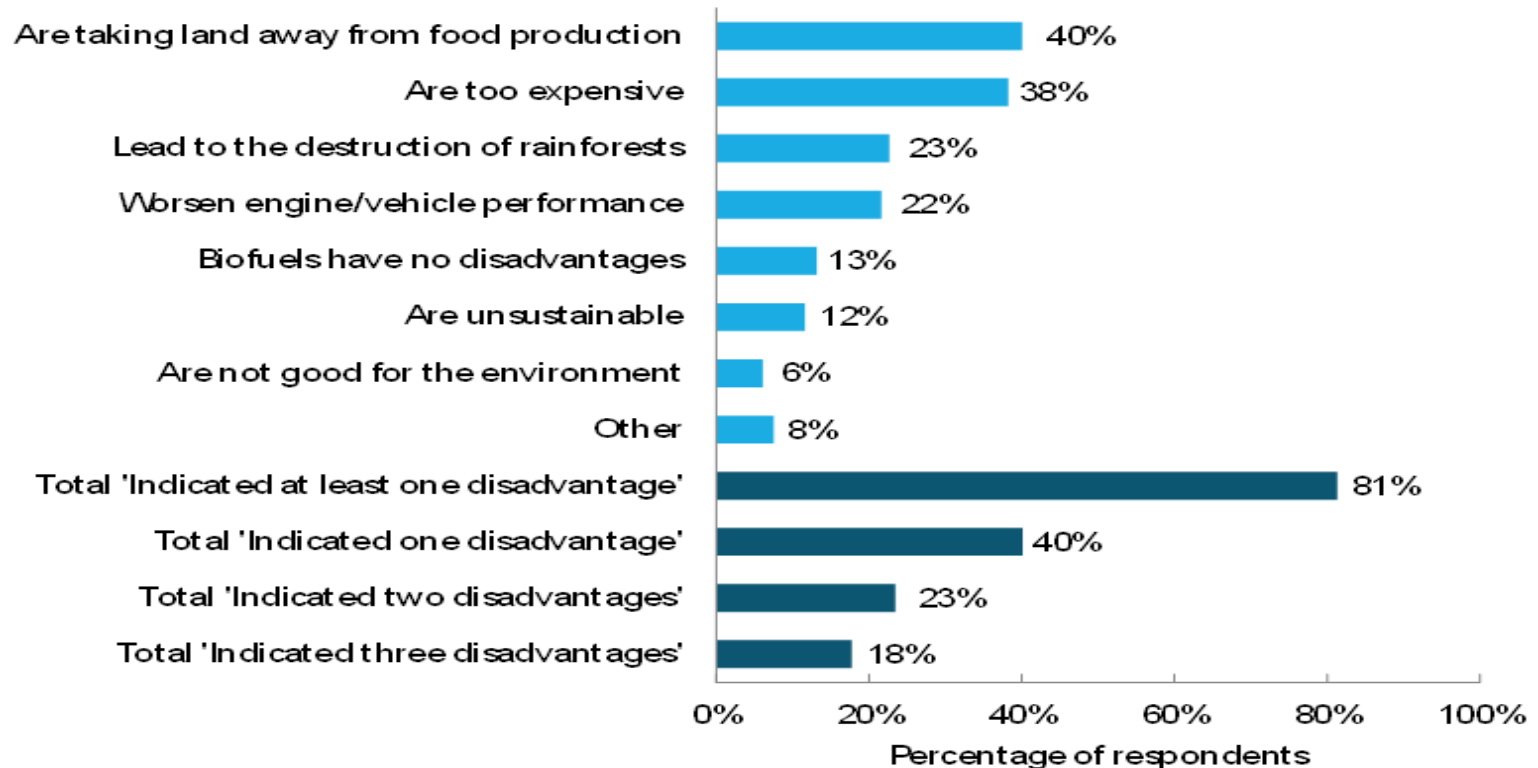
## 2.5.1 Factors in fuel type selection, apart from vehicle compatibility



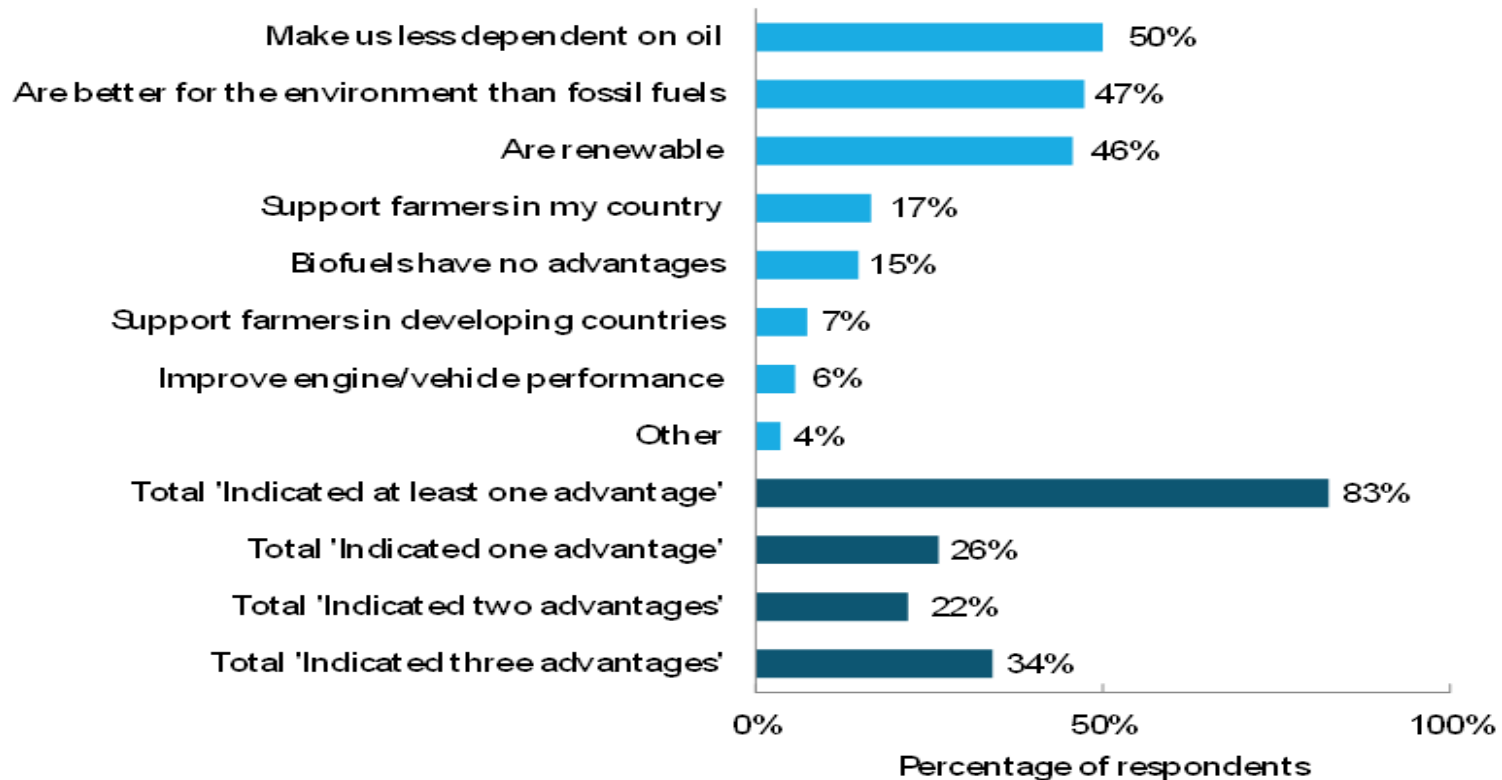
## 2.6 Perspectives on premium fuels



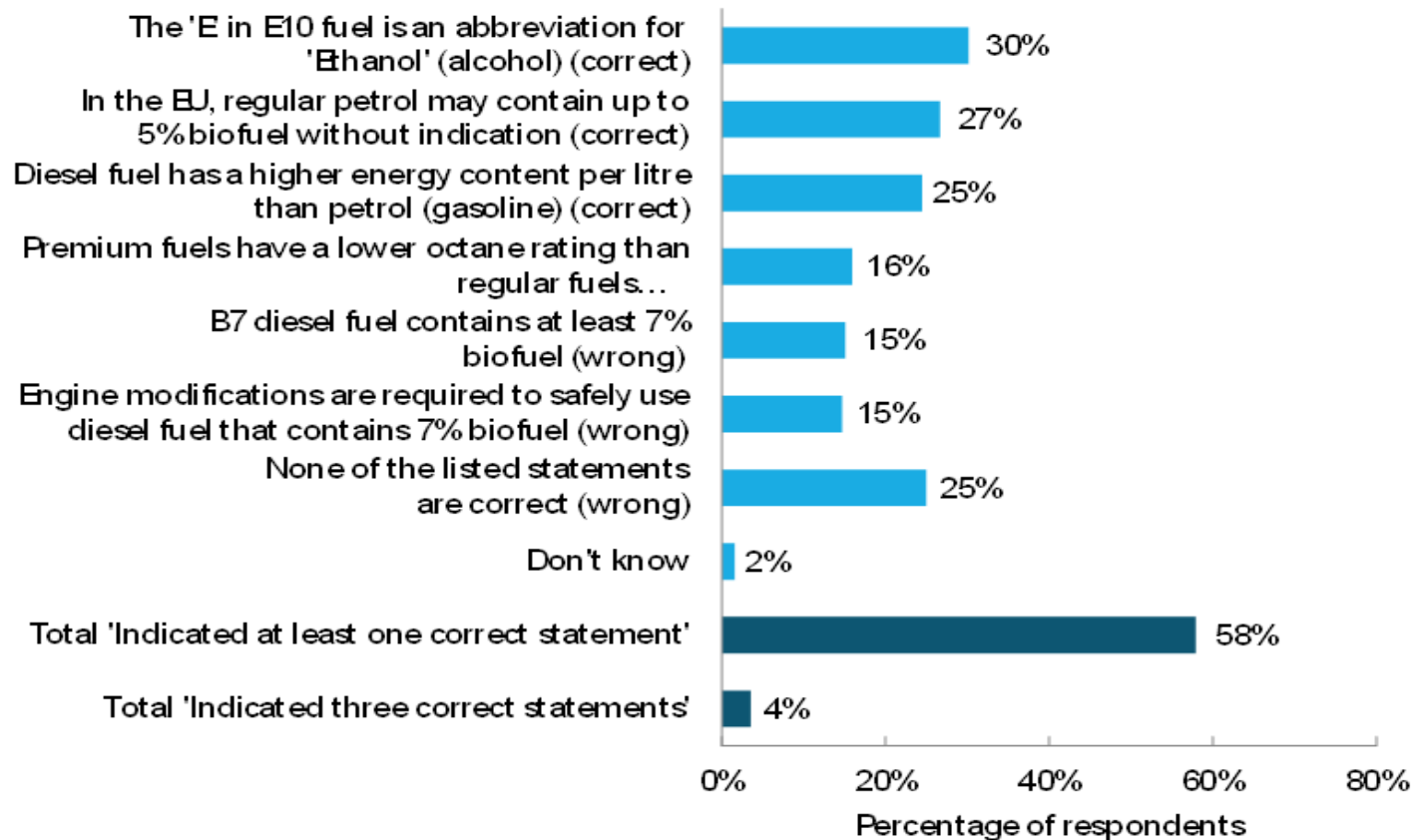
## 2.6.1 Perspectives on claimed disadvantages of biofuels



## 2.6.2 Perspectives on claimed advantages of biofuels



## 2.6.3 General knowledge about fuels

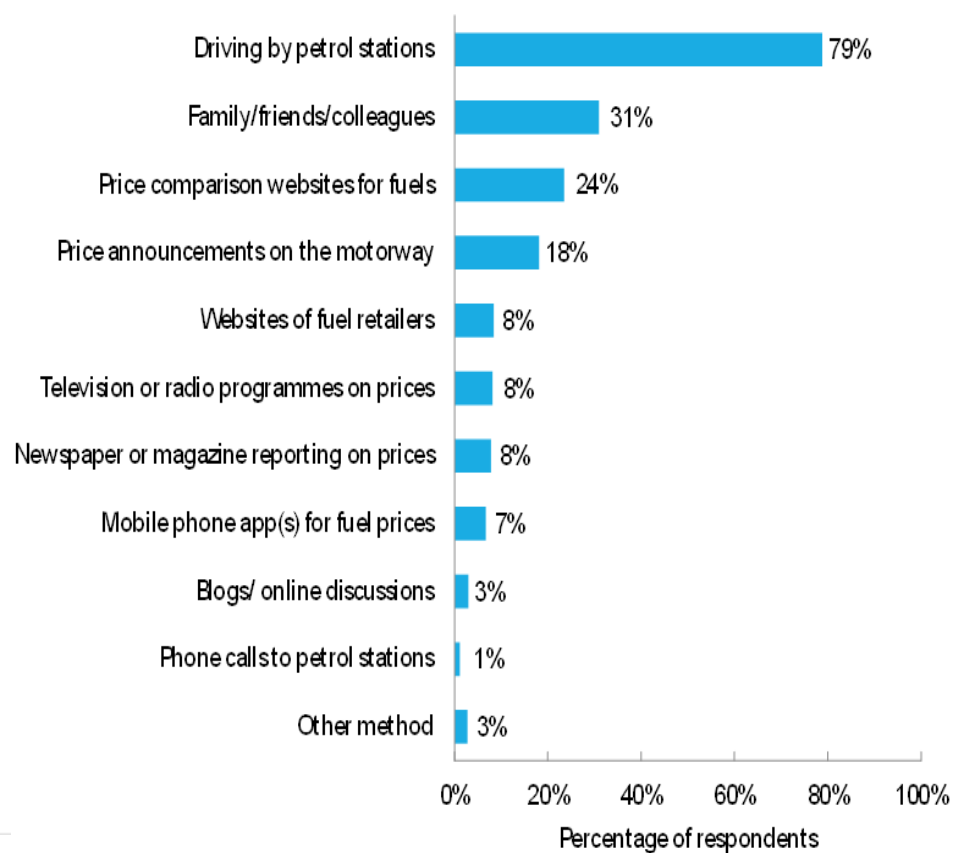
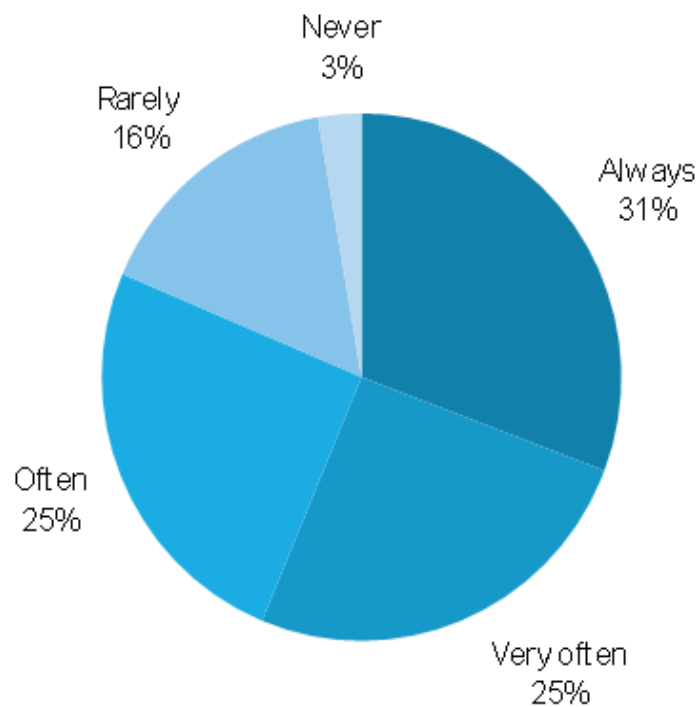


## 2.7 Key conclusions

- Consumers **shop around** and usually **compare prices** when driving by petrol stations;
- Respondents **struggle to get clear information about fuel quality**, but most find it **easy to compare information on fuel prices and fuel types**.
- Respondents showed **limited knowledge** when asked factual questions.



## 3. Comparability of fuel prices



## **3.1 Prices divergences within and between countries**

### **Price differentials between regions:**

- Motorway prices generally more expensive than those in capital cities and rural regions.

### **Price differentials between days of the week:**

- Change by less than 1% between Monday and Friday.

### **Price differentials between manned and unmanned stations:**

- Unmanned stations sell fuels at lower prices than their manned counterparts. (Except Greece). **BUT** Supermarket stations by far the cheapest followed by independent and non-major brands.

## Next steps

- ***Finalisation of the draft final report including the conclusions and recommendations chapter;***
- ***Publication of the market study on DG SANCO website next year;***
- ***Further actions under discussion with relevant Commission services.***



## Q&A

*Thank you for your attention!*

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