

# Service Station Retailing in Austria 2010

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Date: October 2010

Pages: 45

Price: US\$ 2,795.00 (Single User License)

ID: SDCA154C651EN

## Abstracts

### Introduction

Based on Datamonitor's proprietary market data and insight into the leading fuel retailers, this brief provides you with an up-to-date picture of the service station retailing market in Austria. In addition to outlining service station site numbers, fuel sales, competitor shares, c-store, car wash and automatic network data, it also details retailers' product offerings and future direction.

### Features and benefits

Benchmark your service station retail offer against the major national players in the sector by examining their number of sites, shops and car washes.

Develop new marketing ideas for your service station shop, car wash and card propositions by examining the activities of other players across Austria.

Make informed pitches to potential partners by gaining insights into the major retailers' networks, market shares, fuel throughputs and future plans.

Assess overall market entry potential by accessing key market indicators including registered cars, national fuel volumes and average prices.

### Highlights

Austria's service station network has been contracting since 2006, with a decline of 3.1% reported in 2009. In 2009, all major players divested some sites with OMV and BP branded networks contracting by 97 and 33 sites, respectively.

Shops are located on two thirds of forecourts. In 2009, the number of shops at OMV and BP sites declined by 17.5% and 6.9%, respectively, in line with the site numbers. OMV's Viva branded shops launch promotional campaigns on a regular basis and it has also partnered with a celebrity chef for the development of its food products.

There is a car wash facility at over half of all service stations in Austria. BP has the highest number of sites with a car wash, and accounts a fifth of all service station car washes in Austria.

### **Your key questions answered**

Who are the top five players in the service station retail market and how many fuel outlets, motorway & unmanned sites, shops & car wash do they have?

What is the market share and average fuel throughput per site of the top five players in Austria?

How is the service station network evolving and which players are opening new outlets as well as increasing forecourt shops and car washes?

What strategies do the key players have across their fuel and non-fuel offerings in terms of products sold, branding, partnerships and suppliers used?

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