

Global Forecourts Market Size Study and Forecast by Revenue Model (Revenue from Charging Points, Value-added Service, and Energy Storage), and Regional Forecasts 2026-2035

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Abstracts

The global forecourts market is undergoing a significant structural transformation as traditional fuel retail sites evolve into multi-service energy and mobility hubs. Forecourts—historically associated with gasoline retail—are increasingly integrating electric vehicle (EV) charging infrastructure, digital retail services, and distributed energy systems to support the transition toward electrified and connected mobility ecosystems. In this evolving landscape, forecourts serve as critical touchpoints between energy providers, mobility platforms, and consumers, offering a mix of charging infrastructure, convenience services, and energy management capabilities.

In recent years, the market has experienced accelerated innovation driven by the global shift toward electric mobility, urban energy decentralization, and digital consumer engagement. Oil and gas companies, utilities, mobility service providers, and retail operators are redefining the forecourt model to accommodate fast-charging networks, battery storage solutions, and value-added services such as convenience retail, fleet services, and digital payment platforms. Strategic investments in charging infrastructure, integration of renewable energy sources, and partnerships with technology providers are reshaping the competitive landscape. Over the forecast period, forecourts are expected to evolve into integrated mobility hubs, supporting the convergence of transportation electrification, distributed energy management, and digital commerce.

Key Findings of the Report

Market Size (2024): USD 7 billion

Estimated Market Size (2035): USD 228.81 billion

CAGR (2026-2035): 37.30%

Leading Regional Market: Asia Pacific

Leading Segment: Revenue from Charging Points

Market Determinants

Acceleration of Electric Vehicle Adoption

The rapid global expansion of electric vehicle adoption is one of the primary drivers of the forecourts market. Governments across major economies are introducing stringent emission regulations and providing incentives for EV adoption, prompting significant investment in charging infrastructure. Forecourts are uniquely positioned to capture this opportunity by transforming existing fuel retail locations into high-capacity EV charging hubs. This transition is enabling operators to maintain traffic volumes while adapting to new energy consumption patterns.

Evolution of Forecourts into Multi-Service Mobility Hubs

Modern forecourts are evolving beyond fuel dispensing into integrated mobility service centers. Operators are incorporating convenience retail, food services, digital payment solutions, and vehicle services alongside EV charging. This diversification of services increases dwell-time monetization and creates new revenue streams through value-added offerings. As consumers spend more time at charging stations compared to traditional fuel refueling, operators are increasingly leveraging the forecourt environment to deliver enhanced retail and digital experiences.

Integration of Distributed Energy Systems and Storage Solutions

Energy storage and distributed energy technologies are becoming increasingly important components of the forecourt ecosystem. Battery storage solutions enable operators to manage electricity demand, optimize charging loads, and reduce grid dependency during peak periods. In addition, integration with renewable energy sources such as solar panels supports sustainability objectives while lowering operational

energy costs. These developments are strengthening the commercial viability of EV charging infrastructure at scale.

Policy Support and Infrastructure Investments

Governments and regulatory bodies worldwide are accelerating infrastructure deployment through supportive policy frameworks, subsidies, and public-private partnerships. National EV roadmaps in regions such as Europe, North America, and Asia Pacific include extensive charging network expansion targets, positioning forecourts as key infrastructure nodes. Incentives for clean mobility and investments in smart grid infrastructure are further enhancing the economic attractiveness of forecourt modernization.

Operational and Infrastructure Challenges

Despite strong growth prospects, the market faces challenges related to high upfront capital investments, grid capacity constraints, and evolving regulatory frameworks. The installation of ultra-fast charging infrastructure requires significant electrical upgrades and coordination with utility providers. Additionally, uncertainties regarding charging standards, utilization rates, and pricing models can affect investment decisions, particularly in emerging markets.

Opportunity Mapping Based on Market Trends

Expansion of Ultra-Fast Charging Networks

The rapid deployment of ultra-fast charging stations presents a major opportunity for forecourt operators. As EV battery technologies improve and consumer expectations for rapid charging increase, high-power charging infrastructure is becoming a competitive differentiator. Operators that invest in scalable charging networks and strategic site locations can capture high utilization rates and long-term revenue streams.

Monetization Through Value-Added Services

Forecourts are increasingly leveraging retail, hospitality, and digital services to enhance revenue generation during charging dwell times. Opportunities include integrated convenience retail, food and beverage offerings, loyalty programs, and digital commerce platforms. These services can significantly increase average revenue per visit and create differentiated customer experiences.

Energy Management and Grid Services

The integration of battery storage and smart energy management systems enables forecourts to participate in broader energy markets. Operators can optimize energy consumption, engage in demand-response programs, and sell surplus power back to the grid. This energy-as-a-service model creates additional revenue streams while enhancing the operational efficiency of charging infrastructure.

Strategic Partnerships Across the Mobility Ecosystem

Collaboration between utilities, charging infrastructure providers, automotive manufacturers, and mobility platforms is becoming central to forecourt expansion strategies. Strategic partnerships can accelerate deployment, share infrastructure costs, and integrate digital mobility services. These ecosystem-driven models are expected to unlock new business opportunities across both developed and emerging markets.

Key Market Segments

By Revenue Model:

Revenue from Charging Points

Value-added Service

Energy Storage

Value-Creating Segments and Growth Pockets

Among the various revenue streams within the forecourts ecosystem, revenue from charging points currently represents the dominant segment, driven by the rapid expansion of EV charging infrastructure and increasing EV adoption rates. Charging services remain the core revenue engine for most operators as they establish foundational networks to meet rising energy demand from electric mobility.

However, value-added services are expected to emerge as a significant growth accelerator over the forecast period. As charging dwell times remain longer than traditional refueling, operators are leveraging this opportunity to expand retail offerings,

digital services, and hospitality experiences. These services can substantially increase revenue per customer while strengthening brand differentiation.

Energy storage solutions are also expected to witness strong growth as operators seek to optimize energy management and mitigate grid constraints. With the increasing deployment of high-power charging infrastructure, battery storage systems will play a critical role in balancing electricity demand and enabling participation in energy trading or grid services markets.

Regional Market Assessment

North America

North America represents a major growth market due to strong EV adoption momentum and significant investments in charging infrastructure. Government initiatives aimed at expanding national charging networks, combined with private sector investments from energy companies and mobility providers, are accelerating forecourt transformation across the region.

Europe

Europe is characterized by strong regulatory support for decarbonization and an advanced EV ecosystem. Stringent emission reduction targets, urban electrification initiatives, and widespread adoption of renewable energy are driving forecourt operators to invest heavily in integrated charging and energy solutions. The region is also witnessing increased collaboration between oil majors, utilities, and charging network operators.

Asia Pacific

Asia Pacific is expected to emerge as the fastest-growing regional market, driven by rapid EV adoption in countries such as China, Japan, and South Korea. The region benefits from large-scale government incentives, strong domestic EV manufacturing ecosystems, and extensive urban mobility demand. Rapid infrastructure deployment and high vehicle density are likely to create substantial growth opportunities for forecourt operators.

LAMEA

The LAMEA region is gradually entering the electrified mobility transition, supported by increasing infrastructure investments and diversification strategies among energy companies. While EV adoption remains at an early stage in several markets, urbanization, smart city initiatives, and energy transition strategies are expected to support the gradual development of modern forecourt infrastructure.

Recent Developments

March 2024: Several global energy companies expanded investments in ultra-fast EV charging networks across highway and urban forecourts, aiming to accelerate large-scale infrastructure deployment and support the growing EV user base.

October 2023: A strategic partnership between charging infrastructure providers and retail operators was announced to integrate digital payment systems and value-added retail services at EV charging stations, enhancing customer engagement and dwell-time monetization.

June 2023: Multiple forecourt operators initiated pilot projects integrating battery energy storage systems with EV charging infrastructure to optimize electricity demand and reduce grid load during peak charging periods.

Critical Business Questions Addressed

What is the long-term growth trajectory of the global forecourts market?

The report evaluates market expansion driven by EV adoption, charging infrastructure deployment, and diversification of revenue streams across mobility ecosystems.

Which revenue streams will generate the highest value in the evolving forecourt ecosystem?

It analyzes the relative contribution of charging infrastructure, value-added services, and energy storage solutions in shaping future revenue models.

Which regional markets present the most attractive growth opportunities?

The report examines regional dynamics, including regulatory frameworks, EV adoption trends, and infrastructure investment patterns.

How are competitive strategies evolving among forecourt operators and mobility stakeholders?

It explores partnerships, technology integration, and infrastructure expansion strategies adopted by industry participants.

What strategic priorities should companies consider to remain competitive in the evolving market?

The analysis highlights investment priorities in charging technology, energy management systems, and customer-centric service offerings.

Beyond the Forecast

The transformation of forecourts from conventional fuel stations into integrated mobility and energy hubs represents a fundamental shift in the transportation and energy landscape. As electric mobility accelerates globally, the ability to combine charging infrastructure with retail services and energy management solutions will define competitive advantage.

Companies that successfully integrate digital platforms, energy optimization technologies, and customer-centric service ecosystems will capture the greatest share of value in the next-generation forecourt model.

Over the long term, the forecourts market will play a pivotal role in connecting mobility electrification with decentralized energy networks, shaping the future architecture of sustainable transportation infrastructure.

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