

# North America Fuel Station Market By Fuel Type (Petrol, Diesel, Gas, Others), By End-Use (Road Transport Vehicle, Air Transport Vehicle, Water Transport Vehicle, Others) By Country, Competition, Forecast and Opportunities, 2020-2030F

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## Abstracts

### Market Overview

The North America Fuel Station Market was valued at USD 32.38 billion in 2024 and is projected to reach USD 40.28 billion by 2030, growing at a CAGR of 3.71% during the forecast period. This market includes a wide network of service stations across the U.S., Canada, and Mexico, offering gasoline, diesel, compressed natural gas, and increasingly, alternative energy sources like electric vehicle (EV) charging and hydrogen. Fuel stations are evolving into multifunctional service hubs, combining traditional fueling with convenience retail, quick-service restaurants, and automotive services. Rising population, expanding urbanization, and increasing vehicle ownership are driving demand for accessible fueling points, particularly as infrastructure projects improve connectivity in both urban and rural areas. The growing integration of EV charging infrastructure, supported by sustainability initiatives and government funding, is reshaping the sector's future. Retail and energy giants are expanding operations to adapt to shifting mobility preferences and consumer habits. In parallel, innovations in digital payments, loyalty programs, and mobile platforms are elevating the customer experience, making fuel stations pivotal to mobility, energy distribution, and convenience retail in North America.

### Key Market Drivers

#### Rising Vehicle Ownership and Dependence on Road Transportation

The continued growth in vehicle ownership across North America is a primary driver for the fuel station market. In both urban and rural settings, personal vehicles remain the preferred mode of transport due to their flexibility and convenience. Suburban expansion and limited public transportation infrastructure further reinforce automobile reliance. Additionally, the booming e-commerce industry has led to increased demand for delivery vehicles, intensifying fuel consumption across logistics routes. The region's strong freight and commercial transport sectors also require extensive fueling networks along major transportation corridors. With rising population, growing household incomes, and expanding infrastructure, demand for both public and private fueling stations continues to rise, supporting long-term market growth.

## Key Market Challenges

### Shift to Electric Vehicles and Decreasing Demand for Traditional Fuels

The accelerating adoption of electric vehicles poses a challenge to the traditional fuel station business model. As governments promote cleaner energy alternatives and automakers pivot toward full electrification, the demand for gasoline and diesel is gradually declining. EVs require different infrastructure, with longer charging durations and distinct layout considerations, prompting fuel station operators to rethink and reinvest in facility upgrades. While some stations are adapting with EV charging installations, the cost of transformation is significant and often burdens smaller operators. Additionally, reduced fuel volumes may impact profitability, especially for businesses that rely on fuel sales to drive in-store retail traffic. This transition presents strategic and financial challenges as the industry navigates an evolving energy mix.

## Key Market Trends

### Convergence of Fuel Stations with Retail and Lifestyle Services

Fuel stations are increasingly adopting a multi-service business model, merging fueling services with retail and lifestyle offerings such as convenience stores, quick-service restaurants, and parcel delivery lockers. This convergence caters to evolving consumer expectations for convenience and efficiency, especially in commuter-heavy and high-traffic areas. Enhanced digital experiences—including mobile app ordering, loyalty integration, and contactless payment—are becoming standard. By offering a broader range of services, fuel stations are driving higher customer engagement and maximizing revenue opportunities beyond fuel sales. As consumer habits shift toward on-the-go

lifestyles, this trend is expected to accelerate, positioning fuel stations as hybrid mobility and retail destinations.

### Key Market Players

Exxon Mobil Corporation

BP p.l.c.

Chevron Corporation

Phillips 66 Company

Sunoco LP

Alimentation Couche-Tard Inc.

7-Eleven Inc.

RaceTrac, Inc.

### Report Scope:

In this report, the North America Fuel Station Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### North America Fuel Station Market, By Fuel Type:

Petrol

Diesel

Gas

Others

#### North America Fuel Station Market, By End-Use:

Road Transport Vehicle

Air Transport Vehicle

Water Transport Vehicle

Others

North America Fuel Station Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Fuel Station Market.

Available Customizations:

North America Fuel Station Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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