



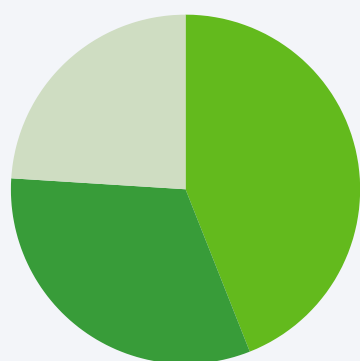
Survey highlights

FRANCE

4 OUT OF 5



84% of French respondents operate a single station, and 100% are located in rural areas. These stations are essential local mobility and community service hubs. Their long-term viability depends on business diversification, accessibility, and the ability to finance the energy transition.

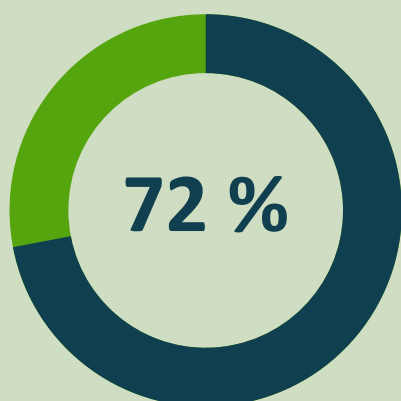


- Moderate
- High confidence
- Low confidence

CAUTIOUS, NOT DEFEATED

76%

The sector remains cautiously optimistic, seeing opportunities in local service adaptation and electrification, while facing concerns over margins, investment costs, and uncertain demand.



ELECTRIFICATION DRIVES THE TRANSITION

72% of fuel retailers see electrification as the main trend, while 56% expect declining fossil fuel demand.

The transition is driven by changing mobility patterns rather than taxation.

TRANSITION SKILLS COME FIRST

88% prioritize sustainable supply chains, 76% financial planning, and 68% business strategy. French fuel retailers are looking for practical tools to adapt their businesses and manage the energy transition with confidence.



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