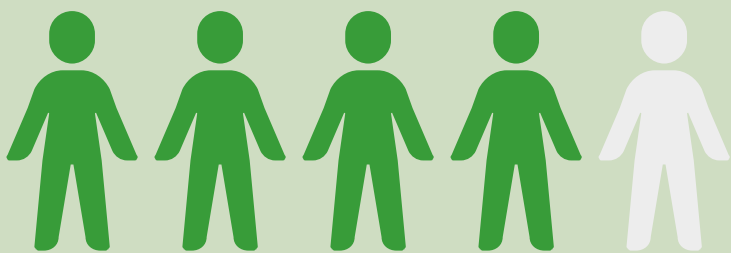




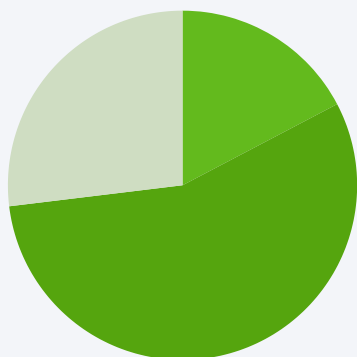
Survey highlights

GERMANY

4 OUT OF 5



80% of respondents (Q2) have more than 10 years of experience in fuel retail. The majority are large-scale operators running more than 10 stations, primarily located in rural areas.

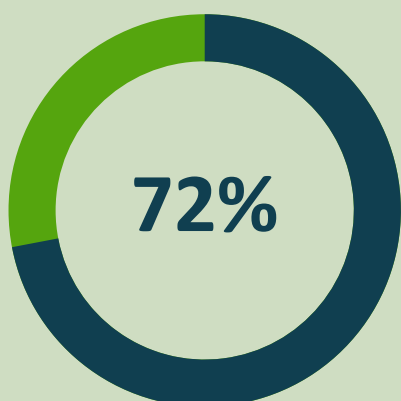


- Yes - 56%
- No - 16%
- Maybe - 28%

EXPECTING SIGNIFICANT BUSINESS CHANGES

56%

of German fuel retailers expect their business model will require significant change (Q8) within the next decade. A further 28% are unsure, highlighting the need for scenario-based transition planning.



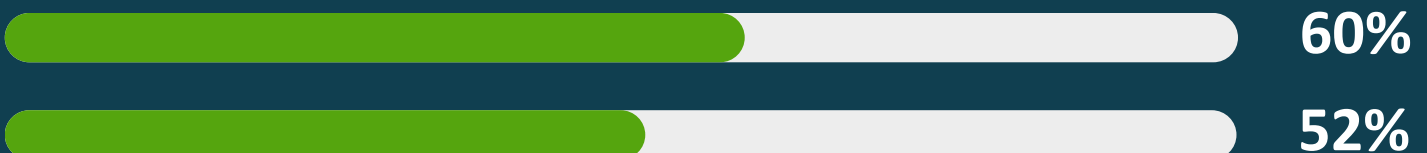
72%

BARRIERS TO TECHNOLOGY ADOPTION

of German fuel retailers expect significant regulatory impact on their business (Q7), identifying *regulations and policy framework* as the top barrier to adopting new technologies.

TRAINING PRIORITIES AND OUTLOOK

German fuel retailers are clear about what they need: Q22 & Q26 notes that 60% identified *digital transformation* and 52% *alternative fuels and technologies* as their most urgent training priorities. Blended, flexible, half-day modules built around real-world case studies are the preferred format, with 96% willing to participate in the inFUElencer programme.



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