



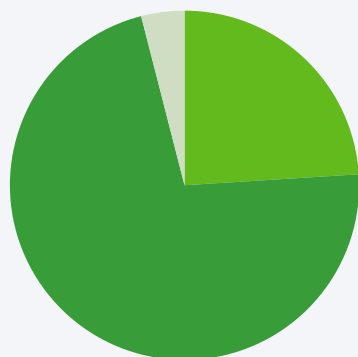
Survey highlights

POLAND

1 OUT OF 2



fuel retailers surveyed in Poland operate as a single station, highlighting that small, independent businesses face the highest pressure to adapt to changing market realities.

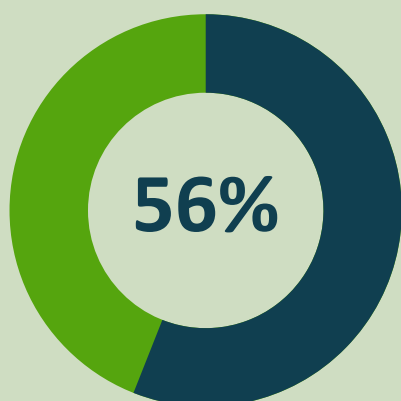


- Yes
- No
- Maybe

PERCEPTION OF THE NEED FOR CHANGE

72%

of Polish fuel retailers recognize that their business model must shift toward non-fuel services - such as gastronomy, EV charging and digitalization - within the next decade, while 4% remain uncertain about the pace of the transition.

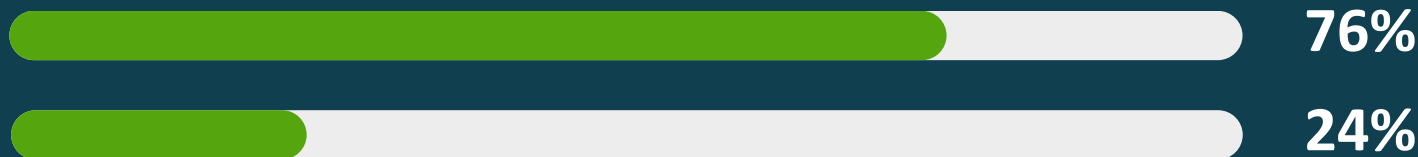


BARRIERS TO TECHNOLOGY ADOPTION

of Polish fuel retailers report operational costs as a main challenge their business currently faces, acting as a significant financial burden when considering the adoption of new technologies and infrastructure modernization.

PREVIOUS PARTICIPATION IN TRAINING

Despite the urgent need for transformation, past training for Polish station staff has focused almost exclusively on traditional operational tasks, sales and health & safety. There is a critical shortage of accessible, industry-specific training programing dedicated to the green transition as 76% of respondents didn't participate in any training.



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