

Focus: **Orlando, Florida** Fourth Quarter 2017

Orlando is still the toughest retail gasoline market in Florida, with competition shaped by several aggressive players.



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Orlando Top 10 Insights

1

Gasoline margins in the fourth quarter were 11.6cts/gal in the Orlando, FL, MSA. It was an improvement of 14.8% from Q4 2016, but Orlando still had the lowest margins of all 24 metros in the Sunshine State.

6

Wawa was the most efficient brand (market share/outlet share), which indicates larger per-store volumes. Wawa's score jumped 4.6% to 2.97. Racetrac followed with a score of 2.16.

2

Margins were very volatile with 8 of the 92 days in the period seeing negative profits despite starting the period with rack-to-retail margins nearly 35cts/gal.

7

Chevron had the largest pricing differential. The average Chevron station on any given day was priced a whopping 11.64cts/gal above direct competitors during the quarter. That was up from 7cts/gal in the final quarter of last year.

3

Chevron had the highest margins with rack-to-retail spreads of 22cts/gal. Costco had the lowest margins when comparing their retail prices to the unbranded average rack price.

8

Costco was the most aggressive retailer. Costco's pumps were priced 8.57cts/gal below competitors during the fourth quarter.

4

7-Eleven sold the most fuel in the market despite seeing its share stumble from 31% last year to 30.4% this past quarter.

9

Demand in the state of Florida between October and December was off 0.8% compared to the same period in 2016.

5

Wawa picked up the largest gains in market share jumping from 17.3% in Q4 2016 to 19.4% in Q4 2017.

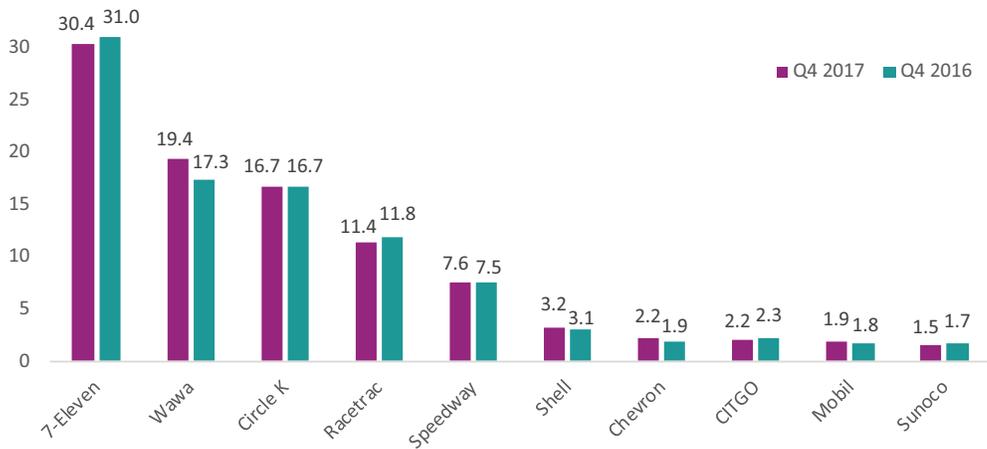
10

Despite the slight growth in throughputs, only four of the 13 weeks during the quarter had positive year-on-year volume gains.

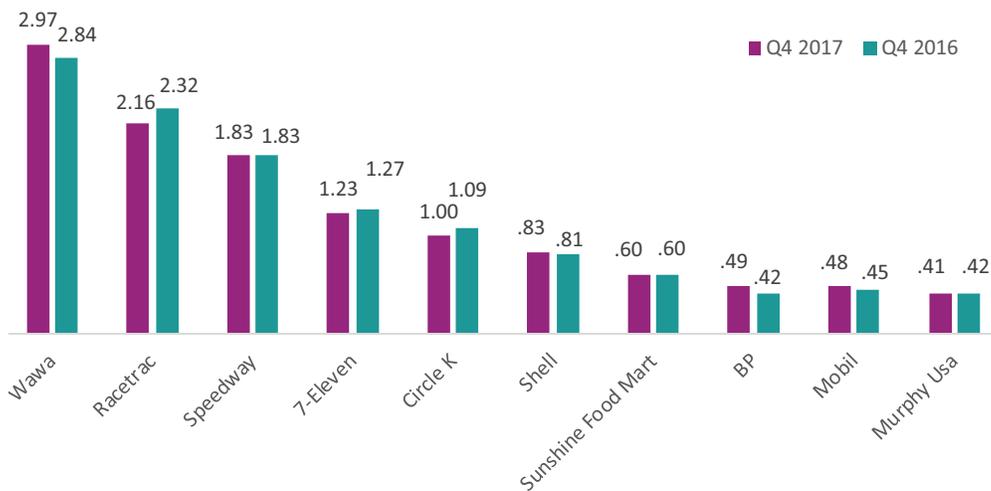
Daily Margins in the fourth Quarter in the Orlando MSA



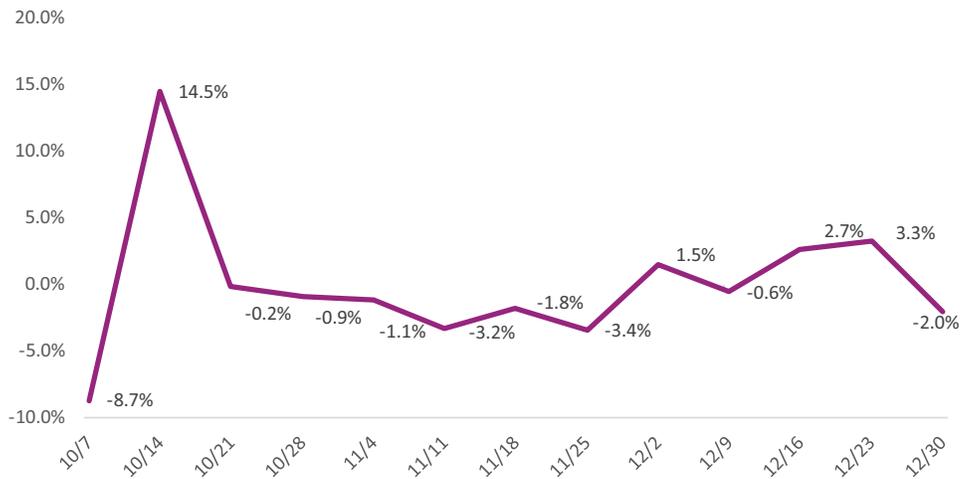
Top Ten Brands with Largest Market Share in Orlando



Top Ten Most Efficient Brands in Orlando (market share / outlet share)



Weekly Year-on-Year Demand Change in State of Florida



Margins by Brand in Orlando for Fourth Quarter versus same Quarter 2016

Rank	Brand (Store)	Outlets	Retail	Cost	Margin	Change	% Change
1	Chevron	48	2.489	2.269	0.22	0.059	26.8%
2	Sunshine Food Mart	9	2.456	2.266	0.19	0.032	16.8%
3	Mobil	33	2.45	2.271	0.179	0.035	19.6%
4	Shell	30	2.442	2.269	0.173	-0.091	-52.6%
5	BP	12	2.433	2.269	0.164	0.012	7.3%
6	Marathon	21	2.424	2.269	0.155	0.044	28.4%
7	Sunoco	60	2.421	2.269	0.152	0.041	27.0%
8	CITGO	79	2.409	2.265	0.144	0.04	27.8%
9	Speedway	33	2.34	2.242	0.098	0.021	21.4%
10	Circle K	134	2.361	2.268	0.093	0.018	19.4%
11	7-Eleven	201	2.352	2.264	0.088	0.02	22.7%
12	Racetrac	42	2.352	2.265	0.087	0.024	27.6%
13	Wawa	52	2.343	2.261	0.082	0.022	26.8%
14	Murphy Usa	11	2.337	2.272	0.065	0.025	38.5%
15	Sams Club	9	2.294	2.261	0.033	0.021	63.6%
16	BJ's	4	2.270	2.266	0.005	0.009	206.0%
17	Costco	4	2.224	2.248	-0.024	0.003	10.2%

This data was compiled using the NEW OPIS RetailSuite. OPIS monitors over 3.5 million gasoline and diesel prices in real time for nearly 140,000 outlets in North America. RetailSuite consists of five different tools that place this accurate data at your disposal on a single online platform to give your stations a competitive edge in every market.

Let us help you be more successful with your business by better monitoring and analyzing your local market - all in one product suite.

OPIS RetailSuite

For a FREE trial or product demo:

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