



# Trends in CIS retail petrol markets: competition in new reality - modern technologies against sanctions

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# About Competition technologies center



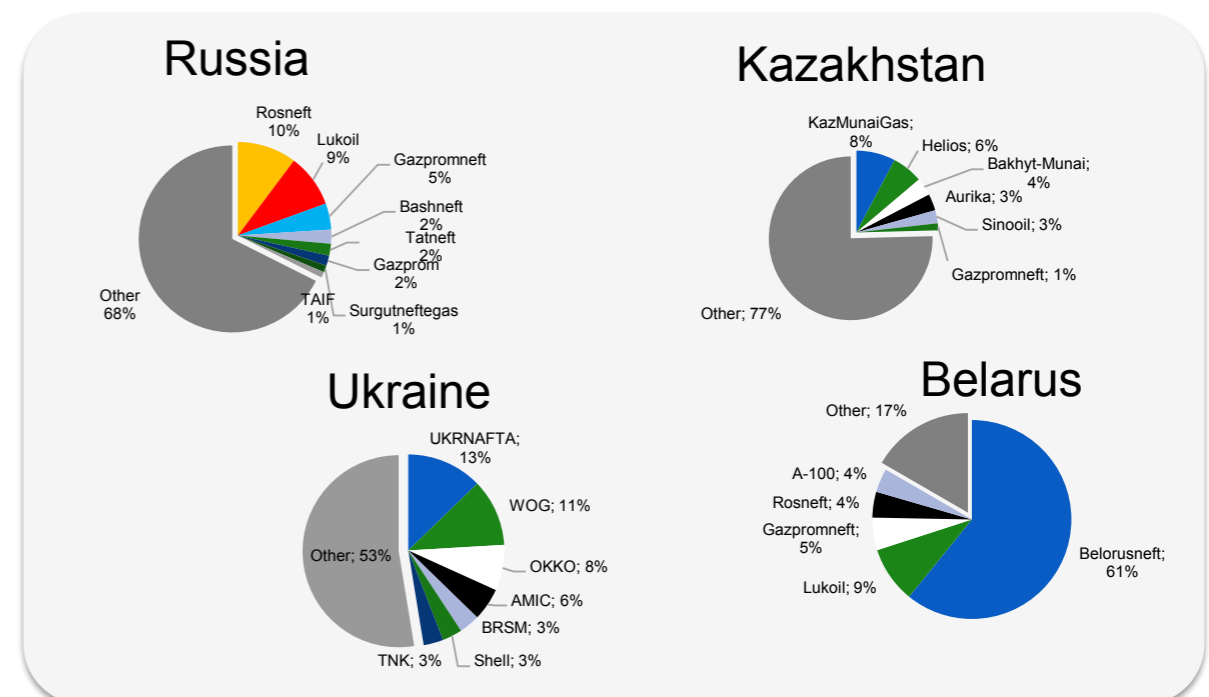
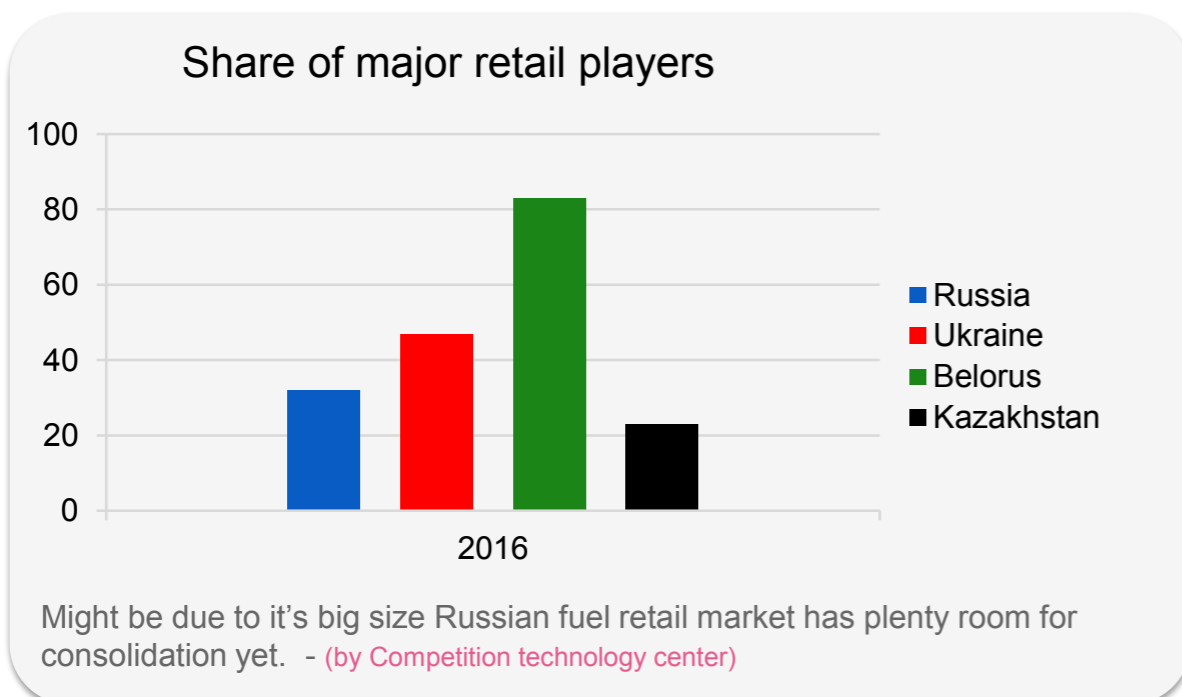
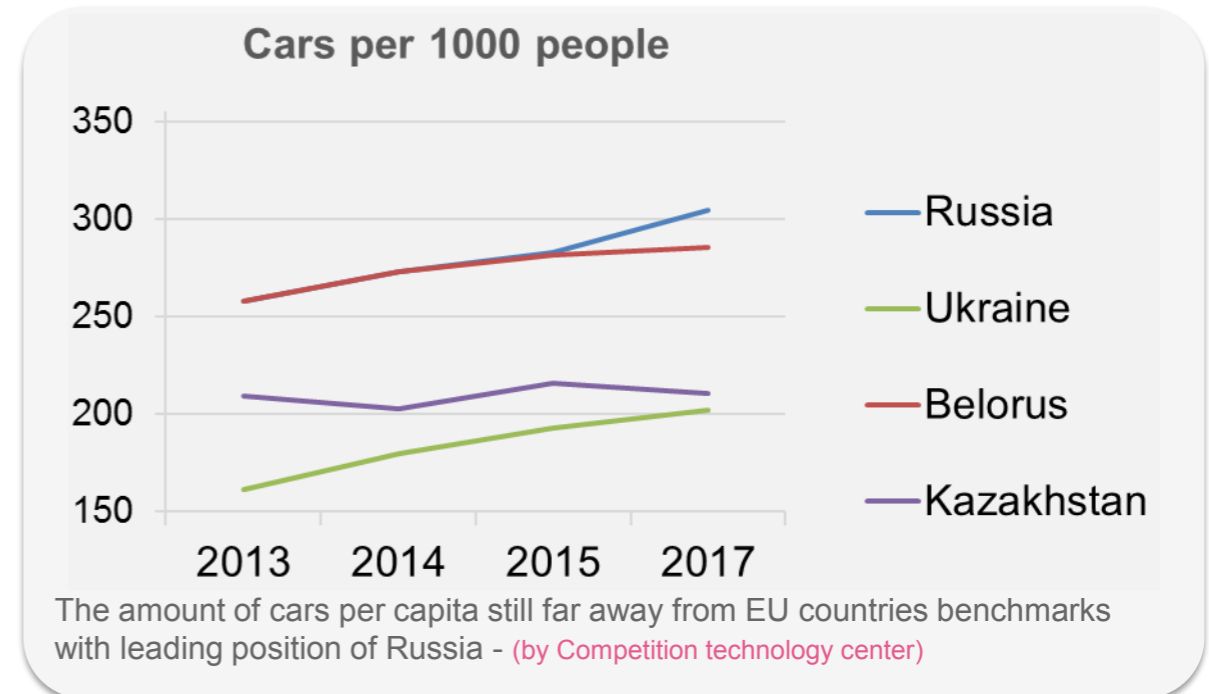
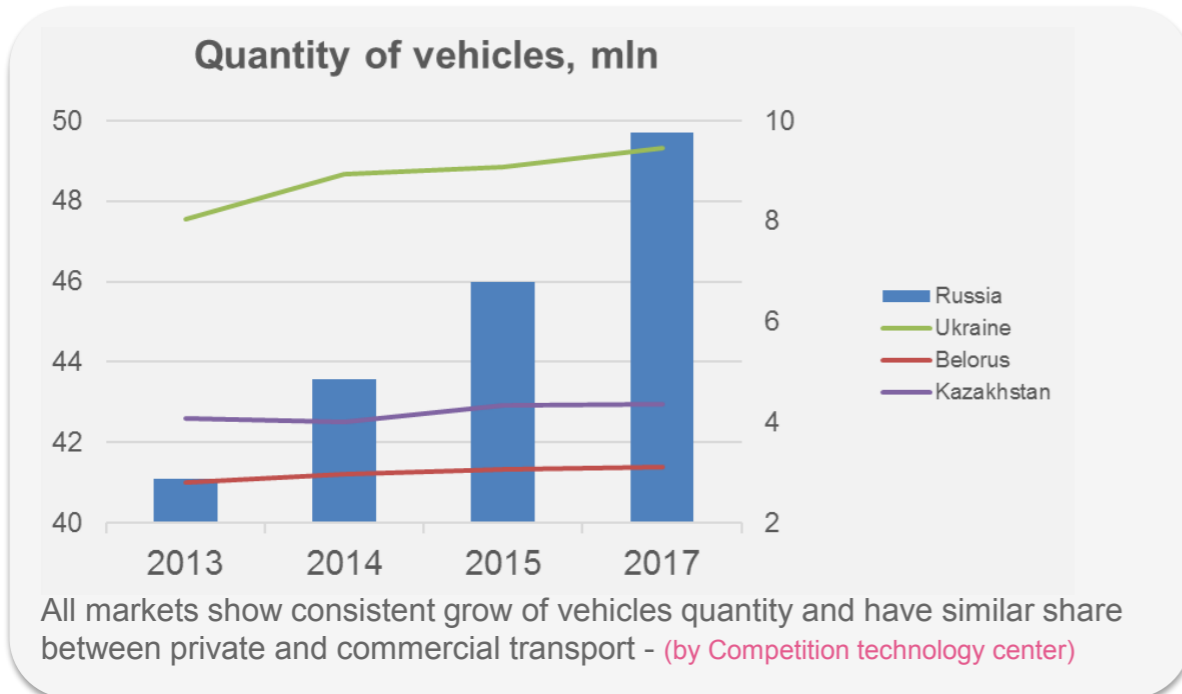
Competition Technologies Center Ltd. is a consulting company which provides marketing support on the field of fuel retailing and creates technological solutions to boost fuel sales on markets with fierce competition. Our commitment is to find solution for our clients to improve the volume of fuel sales in relation to competing filling stations regardless of how complicated the market situation might be.



Our know-how can help you achieve such challenging goals at any stage of your petrol station business:

- Technology of micro-markets studies on town and highway markets,
- Technology and software solution in volume and margin projection for network planning and financial evaluation of rebranding/rehab/rebuild;
- Technology and software solution in retail pricing optimization;
- Technology and software solution in fuel retail promotions for rapid increase of fuel sales.

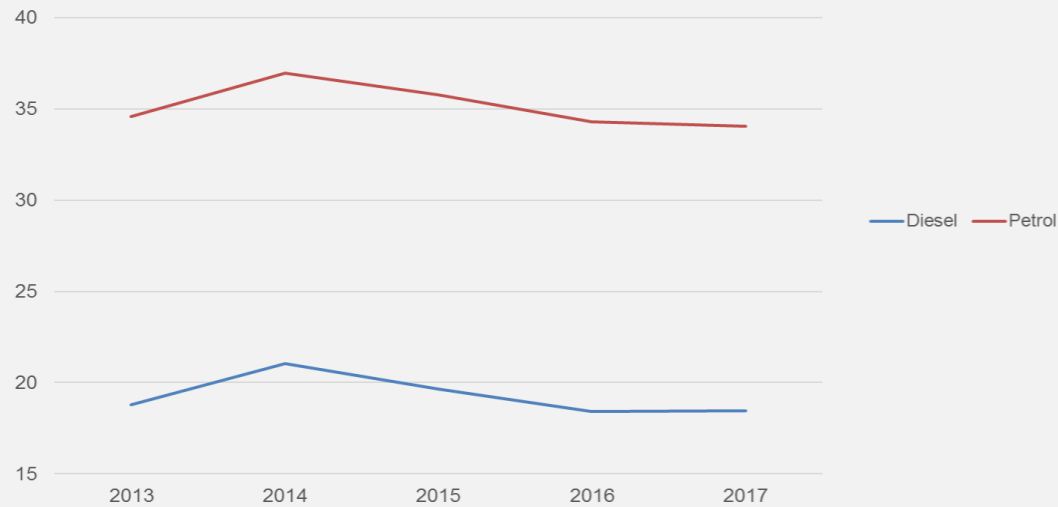
# Comparison between retail fuel markets of CIS countries



# Fuel retail consumption trends on Russian markets

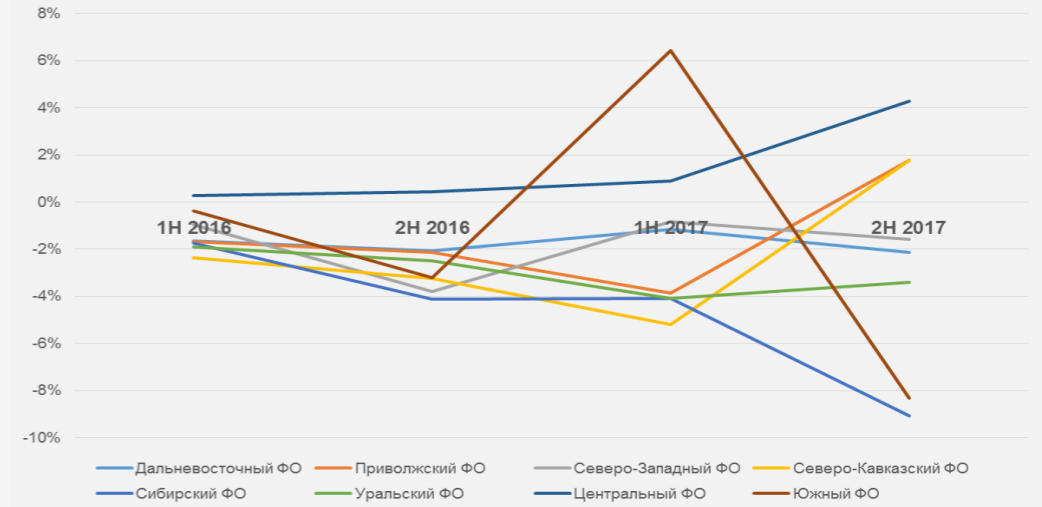


### Fuel consumption Russia, mln t



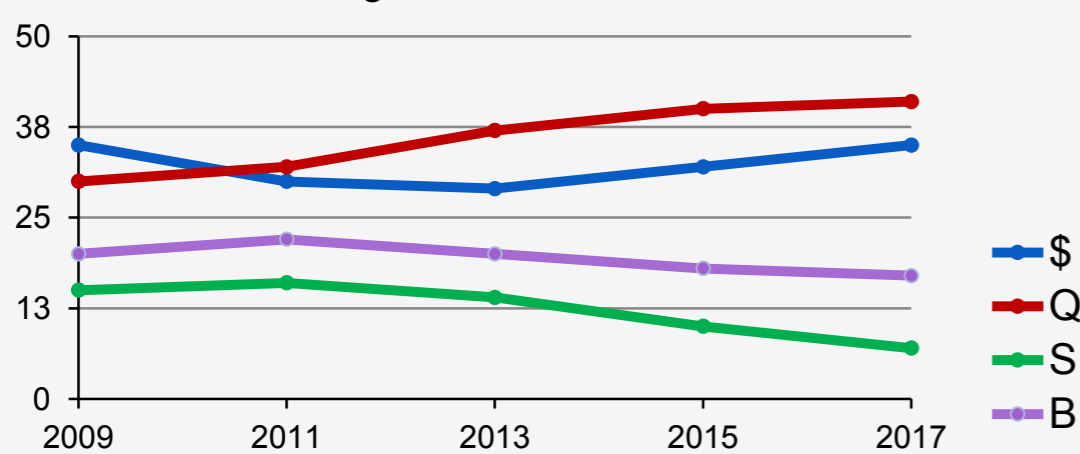
After significant decrease of retail fuel consumption by private and commercial vehicles in 2016 overall market shows no changes (by OMT-Consult)

### Consumption dynamics by regions, YTY



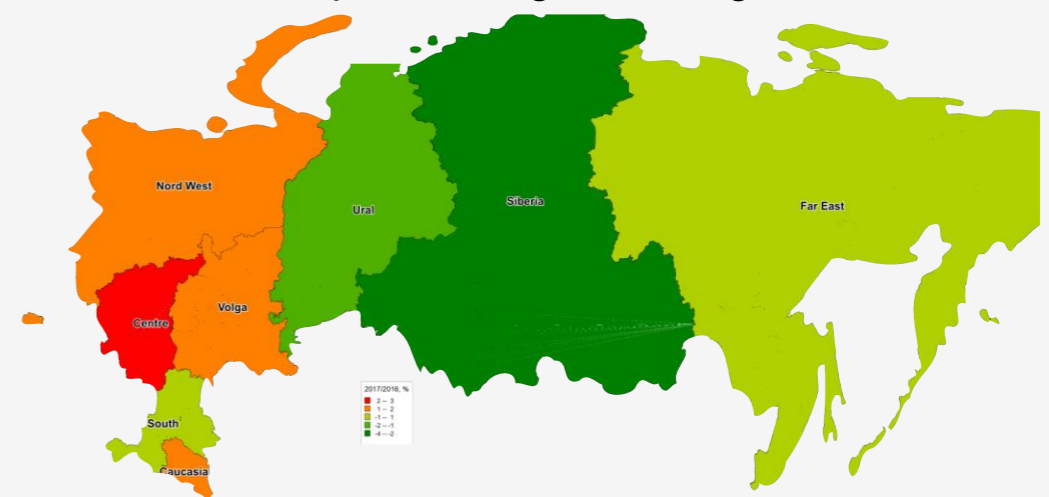
In majority of regions of Russian federation market demonstrates positive dynamic during last two years (by OMT-Consult)

### Customers segment's distribution trends



Increase of price and quality sensitive segment are compensated with decrease of service and brand segments - (by Competition technology center)

### Consumption changes into regions, YTY



There are significant disbalances between regions which must be taken into consideration when working out strategy of competition (by OMT-Consult)



# Contemporary technologies are the only way to stimulate fuel sales



## Study micro-markets for deep understanding

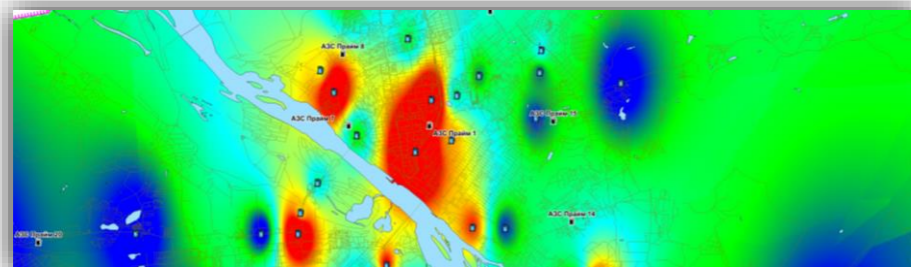


Evaluate local markets to find out which ones have biggest potential to grow fuel sales.

Concentrate resources on these markets to develop site offer, invest in re-build and re-branding. Ensure active use of pricing and non-pricing marketing tools to boost fuel sales.

Modeling of local markets will let you know exact stations of competitors which borrow customers from your petrol station. Struggle with a few of station much easy than struggling with network.

Лишь небольшая часть АЗС конкурентов может забрать покупателей с ваших АЗС. Определите их на рынке и сфокусируйтесь на борьбе с ними.



## Be smart with retail fuel pricing



Maintaining the same retail prices for all petrol station in the town is easiest way to share your price sensitive customers with competitors.

Bring pricing on local market level and implement professional software solution to secure profitable results.

Do not be trapped with mania to change price every hour but instead try to find out an influence of non-pricing factors on fuel sales and most effective price position on the market they are only really matter.

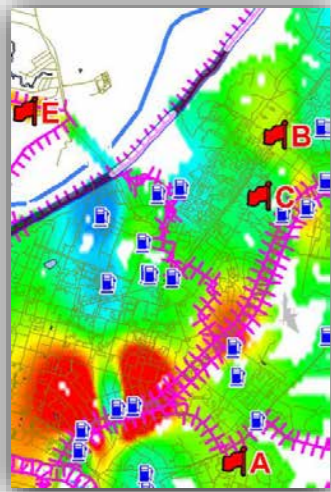
«Смарт цены» - это разные цены для каждой АЗС, понимание влияния неценовых факторов и удержание эффективной ценовой позиции.



# Contemporary technologies are the only way to stimulate fuel sales



## Automate systems of fuel promotions

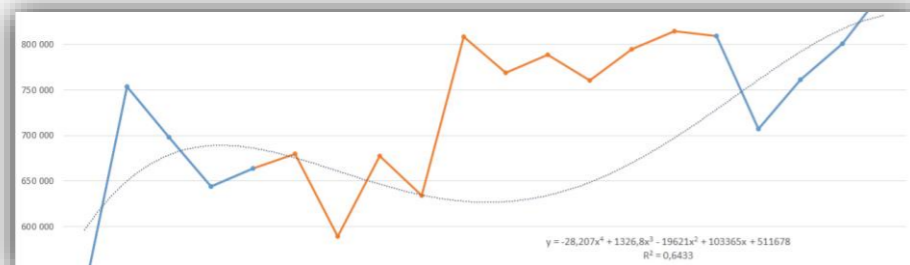


Use fuel promotions when it is complicated to boost fuel sales with pricing tools.

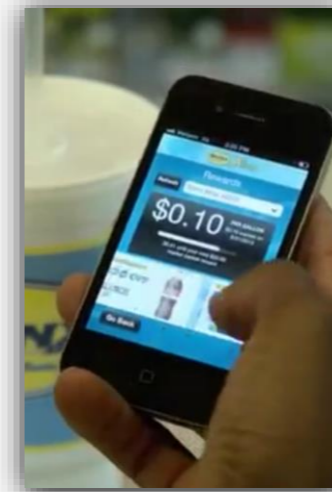
Make sure that you build economical model before creative solution and use modern technology to enhance participation in promotions for your customers.

In retail tactic marketing there are three most powerful tools which can boost fuel sales - pricing, promotions and loyalty. Automate fuel promotions to guarantee quick influence of your best customers.

Автоматизируйте стимулирующие рекламные акции - самый эффективный инструмент быстрого привлечения реализации топлива.



## Make your loyalty active and handy



Create loyalty program which hold your best customers to spend more often on your stations.

Ensure that your program can be easily transferred to modern mobile technology to open you new channel for control and communication with customers.

Fidelity cards work only when customers are already on petrol station but in modern reality you need mobile loyalty which will “drive” customers to your stations with minimum risk to refill on competitors.

Создавайте мобильные технологии «активной лояльности», чтобы привести покупателей на ваши АЗС, а не заправляться у конкурентов.





# Thank you for your attention

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