

United Arab Emirates Fuel Station Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 95 pages | Mordor Intelligence

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Report description:

The UAE fuel station market is expected to register a CAGR of 2.3% during the forecast period (2022-2027). The production of refined products is expected to reach 1,165.2 thousand barrels per day by 2027, up from 949.4 thousand barrels per day in 2021. The COVID-19 outbreak negatively impacted the consumption of refined petroleum products, such as diesel, as most of the commercial and residential spaces in the country rely on diesel generators for power supply. Major factors such as increasing adoption of compact fuel station concept, expansion of existing fuel station infrastructure, and increased investment in the downstream sector by government and multinational corporations are expected to drive the market during the forecast period. However, increasing demand for electric vehicles in the country, fluctuating fuel prices, and stringent regulations implemented by fuel station industries are expected to restrain the UAE fuel station market.

Key Highlights

Increasing adoption of the compact fuel station concept is expected to drive the UAE fuel station market during the forecast period, as the concept offers accessible and convenient refueling services to customers.

Upcoming investments in the downstream oil and gas market by domestic and foreign players may create several opportunities for the market in the coming years.

The increasing adoption of electric vehicles is expected to hinder the market's growth during the forecast period.

UAE Fuel Station Market Trends

Increasing Number of Vehicles to Drive the Demand

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The country's automotive fleet has increased significantly over the decade, which is expected to create greater demand for fuel stations in the coming years.

The compact stations aim to serve the consumers living in remote residential areas. These fuelling stations can be placed in the parking areas of urban locations with an anticipated capacity of 30,000 L. The compact fuel station is equipped with a fuel tank set up above the ground and facilitates reassembling and moving to a new location.

In 2019, the refined petroleum product sales in Abu Dhabi registered over 6,522 thousand metric ton, and the other Emirates reported around 2,836 thousand metric ton. There has been significant demand for petroleum products from vehicle fleets in the country, which is expected to create opportunities for operators to provide mobile fuel stations as per the convenience of the customers.

The increasing number of vehicles on-road in the country will likely increase the demand for compact fuel stations during the forecast period. According to the International Organization of Motor Vehicle Manufacturers (OICA), the total sales volume of vehicles (includes all types of vehicles) in the country reached 90,631 units in H1 2021, witnessing a 12% rise from 80,838 units in H1 2020.

ENOC Group piloted its first compact fuel station concept in Dubai in 2018. The pilot station is designed to cater to residents living in residential communities and is equipped with one above tank fuel dispenser and a vending machine. The fuelling unit is distinguished for its mobility as it can be dismantled, relocated, and re-installed at locations without easy access to fuel in just 30 days.

In December 2021, ENOC Group announced a partnership agreement with Nakheel Group to open 14 mobile fuel stations in Dubai, to provide customers with fast, convenient, and simplified refueling services.

Thus, technological advancements are expected to drive the fuel station market in the United Arab Emirates during the forecast period.

Increasing Adoption of Electric Vehicles to Restraint the Market's Growth

With a desire for higher decarbonization of transport in the United Arab Emirates, the government is expected to encourage further technological and economic improvements in electric vehicle technologies in each level of vehicle hybridization and electrification.

In the current market scenario, supportive policies are the major factor driving electric vehicle adoption. The policies enable market growth by creating awareness to consumers, reducing risks for investors, and encouraging manufacturers to develop electric vehicles on a large scale.

For instance, the United Arab Emirates government plans to launch a free charging station for electric vehicles in Sharjah. The Sharjah City Municipality (SCM) and the Sharjah Electricity and Water Authority (Sewa) partnered for this project. ION, a UAE-based company, will be supplying, installing, and operating the EV charging stations in the Emirate.

In August 2021, the Abu Dhabi Department of Energy (DoE) announced a new governance framework for charging electric vehicles (EVs) in the Emirate. It aims to enhance vehicle-grid integration and encourage the private sector and consumer participation to scale up EV use in Abu Dhabi.

Thus, the increasing adoption of electric vehicles is expected to hinder the growth of the UAE fuel station market.

UAE Fuel Station Market Competitor Analysis

The UAE fuel station market is consolidated. The key players in the market include Abu Dhabi National Oil Company, Emirates National Oil Company (ENOC), Emirates General Petroleum Corporation, and TotalEnergies SE.

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