

Energy Regulatory Office

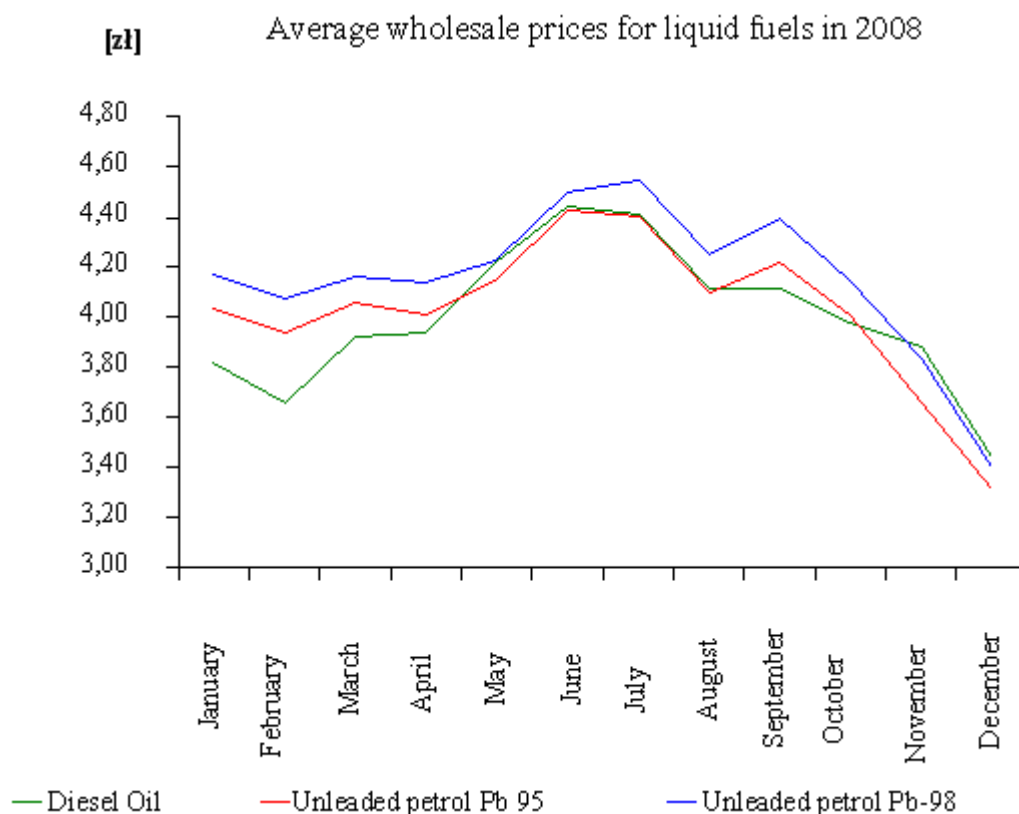
<https://www.ure.gov.pl/en/energy-in-poland/26,Fuels.html>
26.04.2024, 23:18

Fuels

The wholesale sale of fuels is conducted in more than 80% by PKN Orlen SA and Lotos Group SA, which of these two are also the main producers of fuels and as the only ones in the country produce liquid fuels from crude oil.

Retail turnover of petrol, diesel oil and auto-gas is generally done At petrol stations. There are around 7000 petrol stations operating throughout the country as well as about 5 900 auto-gas stations. Around 50% of all the gas stations belong to individual enterprises, and the rest are owned or operate under logos belonging to such retail companies as: PKN Orlen SA, Grupa Lotos SA, Shell, Statoil, BP, Lukoil, Neste and so on. The market for petrol stations located in the proximity of large hypermarkets is developing very dynamically, as well.

The prices for liquid fuels depends on the prices of crude oil on the international markets, the rate of excise tax and fuel charge, as well as the exchange rate of zloty against USD and euro. The prices of liquid fuels are not regulated by the URE President, neither by any other administrative body. Because of big decrease of crude oil prices, the prices for liquid fuels dropped in the second half of 2008 to the level of the first half of 2006.



Average gross prices for unleaded petrol Pb-95 and Pb-98 as well as diesel oil in the wholesale market in 2008 (Source: URE on the basis of data from PKN ORLEN SA and

LOTOS Group SA)

In comparison to 2007 there has been an increase in entities, where bad quality of liquid fuels has been detected. It resulted from two reasons: firstly, the Trade Inspection started to control liquefied gas LPG, which was not fully controlled before, secondly, new quality parameters of diesel oil and unleaded petrol have been additionally checked. In total 4,2% of gas stations sold diesel oil and petrol with unsuitable quality, (that is, 2,5% more than the previous year).

For the past few years there has been observed more clear trends on the liquid fuel market, generally based on:

1. domination in the wholesale trade of two companies: PKN Orlen SA and Lotos Group SA,
2. relatively acceptable competition on the retail market,
3. increase in the sale of diesel oil with the decrease of petrol and fuel oil at the same time,
4. high, with comparison to other European countries, sale of auto-gas.

23.08.2021

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