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PLANNED AVAILABILITY OF UNLEADED GASOLINE AT BRANDED RETAIL OUTLETS IN CANADA

JUNE 1974



Industry, Trade
and Commerce

Industrie
et Commerce



PLANNED AVAILABILITY OF UNLEADED GASOLINE

AT

BRANDED RETAIL OUTLETS IN CANADA

SURVEY CARRIED OUT

BY

DEPARTMENT OF INDUSTRY, TRADE AND COMMERCE

112 KENT STREET

OTTAWA, CANADA

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Introduction

Although the Canadian automobile exhaust emission regulations for hydrocarbons, carbon monoxide and nitrogen oxides effective with the 1975 model year do not necessitate the use of catalytic converters, some automobile manufacturers have opted to use such converters on at least certain models to be sold in Canada. These vehicles will require unleaded gasoline to avoid a poisoning of the catalyst by the combustion products of gasoline containing lead anti-knock compounds. This poisoning would have no effect on engine performance but would result in exhaust emissions greatly in excess of the permissible levels.

The purpose of this survey was to provide some indication of the likely availability of unleaded gasoline throughout Canada to motorists driving those 1975 model automobiles and light trucks equipped with catalytic converters. It was hoped that the composite picture provided would be useful to the tourist industry, the automobile industry, the gasoline refining and marketing segments of the oil industry and also to the individual car buyer and motorist.

Survey Method Employed

The following 17 companies were involved with the survey:

BP Canada Limited,
Consumers' Cooperative Refineries Limited,
Golden Eagle Canada Limited,
Gulf Oil Canada Limited,
Husky Oil Canada Limited,
Imperial Oil Limited,
Irving Oil Limited,
Mohawk Oil Company Limited,
Murphy Oil Company Limited,
Pacific Petroleum Limited,
Petrofina Canada Limited,
Shell Canada Limited,
Standard Oil Company of British Columbia Limited,
Sun Oil Company Limited,
Texaco Canada Limited,
Turbo Resources Limited,
Union Oil Company Canada Limited.

The country was divided on a purely arbitrary basis into 64 geographic areas, some of which were wholly urban. In selecting these areas, the desire for detailed information was balanced

against the need to maintain confidentiality of marketing plans of individual companies and also against a desire to keep the number of pieces of data to a manageable size.

Each company was requested to supply the following information for each area in which it had retail outlets, including outlets of wholly-owned subsidiaries:

1. Expected number of total branded retail outlets as of October 1, 1974 and also as of July 1, 1975.
2. Expected number of these outlets at which unleaded gasoline would be available as of October 1, 1974 and July 1, 1975.

The October 1, 1974 date was selected as that date when 1975 model cars would become generally available. The July 1, 1975 date was selected as the date when the peak tourist season would begin for motorists driving 1975 model automobiles.

No attempt was made in this survey to obtain information on the capability of refineries to produce unleaded gasoline. All information requested related to retail outlets of branded gasoline and it was assumed that companies would have the necessary refining capability, or would have assured access to the amount of unleaded gasoline required, to supply the planned number of unleaded outlets. No attempt was made to obtain information on the likely availability of unleaded gasoline at non-branded retail outlets.

The initial survey was carried out in the latter part of 1973 and the composite data obtained was issued as a preliminary report in February 1974. The companies then were re-surveyed in June.

Survey Results

The composite data obtained as a result of the re-survey is given in the attached tables.

For the country as a whole, unleaded gasoline will be available at over 5,000 retail outlets or about one out of five branded stations by October 1, 1974. As of mid 1975 the number will have increased to over 8,000, or about two out of every seven branded retail outlets.

The data indicates that the urban car owner and the motorist travelling on or near major roads will find unleaded gasoline readily available. As of October 1, 1974 major urban areas will account for over 50% of the total unleaded outlets in the country and, on the average, unleaded gasoline will be available at one out of every three branded urban outlets. By mid 1975 unleaded gasoline will be available at one out of every two branded outlets to be found in the major urban areas.

In non-urban areas where fewer high volume stations exist, unleaded gasoline outlets will be more difficult to locate. On the average it will be available at only one out of every eight branded outlets in the non-urban areas across the country as of October 1, 1974. During the next nine months, more unleaded installations will be made in the non-urban as compared to the urban areas, but by mid 1975 unleaded gasoline still will be available at only about one out of every five non-urban outlets. Nevertheless, it appears that in all but the most remote parts of the country, the motorist travelling in rural areas will be able to find sufficient unleaded outlets to meet his requirements. However, some planning of refueling stops will be required.

The most inconvenience will be experienced by the non-urban automobile owner whose place of residence may be a considerable distance from the nearest unleaded gasoline outlet.

Demand for Unleaded Gasoline

Most of the demand for unleaded gasoline will originate with drivers of vehicles equipped with catalytic converters. Estimates made by this Department at the end of June 1974 indicate that by December 31, 1974 about 1.4% of the total Canadian vehicle registrations could require unleaded fuel, and that by the end of 1975, this percentage could increase to about 6.4%. In addition, it is expected that a significant number of U.S. travellers to Canada will be driving vehicles requiring unleaded gasoline.

Using as the base forecasted Canadian sales of vehicles requiring unleaded gasoline, and taking into consideration some requirement by U.S. tourists and some sales to drivers of vehicles which do not require it, total Canadian demand for unleaded gasoline would appear to be in the range of 1.5% - 2.5% of total Canadian gasoline sales by the end of 1974, and in the range of 6.5% - 7.5% by the end of 1975.

SUMMARY OF SURVEY DATA ON
 PLANNED AVAILABILITY OF UNLEADED GASOLINE AT
 BRANDED RETAIL OUTLETS IN CANADA

SURVEY DATE
June 1974

Geographic Area		October 1, 1974			July 1, 1975		
		Estimated Total Outlets	Estimated Outlets Having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets Having Unleaded Gasoline	
			Number	% of Total		Number	% of Total
Newfoundland	St. John's	81	31	38	84	44	52
	Remainder of province	669	66	10	693	106	15
Prince Edward Island		264	36	14	263	61	23
Nova Scotia	Sydney/Halifax/Dartmouth	268	92	34	268	116	43
	Remainder of province	1,172	154	13	1,169	227	21
New Brunswick	St. John/Moncton	170	43	25	171	64	37
	Remainder of province	1,377	174	13	1,368	254	19
Quebec	Major Urban	2,618	862	33	2,588	1,111	43
	Remainder of province	4,204	443	11	4,017	739	18
Ontario	Major Urban, Hwy 401 and QE Hwy	2,375	990	42	2,370	1,404	59
	Remainder of province	6,778	899	13	6,699	1,698	25
Manitoba	Winnipeg	333	165	50	333	207	62
	Remainder of province	1,160	67	6	1,132	139	12
Saskatchewan	Regina	105	49	47	105	71	67
	Remainder of province	1,923	156	8	1,913	257	13
Alberta	Calgary and Edmonton	656	316	48	656	409	62
	Remainder of province	1,539	169	11	1,643	271	16
British Columbia	Vancouver/New Westminster/Victoria	872	297	34	853	397	47
	Remainder of province	2,125	328	15	2,132	516	24
Yukon and Northwest Territories		63	3	5	63	6	10
Totals	Major Urban Centers	7,478	2,845	38	7,428	3,823	51
	Remainder of country	21,274	2,495	12	21,082	4,274	20
	Total Canada	28,742	5,340	19	28,520	8,097	29

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN NEWFOUNDLAND

Survey Date
June 1974

Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
1. St. John's	81	31	38	84	44	52
2. Area South of an East/West line running through Clarenville but <u>excluding</u> St. John's.	259	30	12	267	42	16
3. Area North of an East/West line running through Clarenville and South of an East/West line running through Springdale.	298	31	10	308	55	18
4. Area North of an East/West line running through Springdale.	112	5	4	118	14	12
NEWFOUNDLAND PROVINCIAL TOTALS	750	97	13	777	150	20

Survey Date
June 1974

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
 AT BRANDED RETAIL OUTLETS IN PRINCE EDWARD ISLAND

Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
1. Total Province	264	36	14	263	61	23

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN NOVA SCOTIA

Survey Date
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Sydney	75	13	17	74	17	23
2. Remainder of Cape Breton Island.	184	36	20	184	47	26
3. Halifax/Dartmouth.	193	79	41	194	99	51
4. Area of mainland Nova Scotia East of a North/South line running through Bedford but <u>excluding</u> Halifax/Dartmouth.	385	65	17	383	94	25
5. Area West of a North/South line running through Bedford.	603	53	9	602	86	14
NOVA SCOTIA PROVINCIAL TOTALS	1,440	246	17	1,437	343	24

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN NEW BRUNSWICK

Survey Date
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Saint John	95	20	21	96	30	31
2. Fredericton and all areas South of an East/West line passing through Fredericton but <u>excluding</u> Saint John.	315	52	17	312	77	25
3. Moncton	75	23	31	75	34	45
4. Area lying between an East/West line running through Chatham and an East/West line running through Fredericton but <u>excluding</u> Moncton.	603	74	12	599	104	17
5. Area North of a East/West line running through Chatham.	459	48	10	457	73	16
NEW BRUNSWICK PROVINCIAL TOTALS	1,547	217	14	1,539	318	21

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN QUEBEC

Survey Date
June 1974

Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
1. Area South of the St. Lawrence River and East of, and including, Rivière-du-Loup.	335	34	10	320	60	19
2. Sherbrooke	149	69	46	148	78	53
3. Jacques-Cartier area.	254	114	45	246	139	57
4. Remainder of the province South of the St. Lawrence River.	1,514	160	11	1,461	258	18
5. Montreal area.	1,511	479	31	1,485	620	42
6. Trois-Rivières.	117	26	22	118	35	30
7. Area North of the St. Lawrence, South of an East/West line running through Portneuf and East of a North/South line running through Montebello but <u>excluding</u> Trois-Rivières and Montreal area.	802	132	16	765	197	26
8. Hull	121	32	26	122	39	32
9. Area South of an East/West line running through Portneuf and West of a North/South line running through Montebello but <u>excluding</u> Hull.	462	31	7	440	54	12

QUEBEC (CONT)

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Survey Date
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlooks	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlooks	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
10. Quebec.	315	118	38	318	161	51
11. Chicoutimi.	151	24	16	151	39	26
12. Area North of the St. Lawrence and East of a North/South line running through Portneuf but <u>excluding</u> Quebec and Chicoutimi.	451	44	10	430	77	18
13. Area West of a North/South line running through Portneuf and North of an East/West line running through Portneuf.	640	42	7	601	93	15
QUEBEC PROVINCIAL TOTALS	6,822	1,305	19	6,605	1,850	28

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN ONTARIO

SURVEY DATE
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Ottawa.	240	103	43	241	151	63
2. Area lying North of a line joining Brockville and Wiarton and East of a North/South line passing through Bancroft but <u>excluding</u> Ottawa.	1,013	84	8	1,012	141	14
3. Outlets on and adjacent to Highway 401 from Brockville to Windsor and to the QEW, and all of the Oshawa-Toronto-Oakville-Hamilton-Niagara Falls and Welland area.	1,889	817	43	1,876	1,130	60
4. That part of the province South of the Brockville/Wiarton line but <u>excluding</u> that area covered by Number 3.	3,754	665	18	3,698	1,210	33
5. Sudbury and Sault Ste. Marie.	153	45	30	154	73	48
6. Area West of a North/South line through Bancroft, North of the Brockville/Wiarton line and South of an East/West line running through Temiscaming, but <u>excluding</u> Sudbury and Sault Ste. Marie.	1,064	77	7	1,050	191	18
7. Area lying North of an East/West line through Temiscaming and East of a North/South line through Nipigon.	628	45	7	624	93	15

ONTARIO (CONT)

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Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
8. Thunder Bay.	93	25	27	99	50	50
9. Area lying West of a North/South line running through Nipigon but <u>excluding</u> Thunder Bay.	319	28	9	315	63	20
ONTARIO PROVINCIAL TOTALS	9,153	1,889	21	9,069	3,102	34

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN MANITOBA

Survey Date
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Winnipeg.	333	165	50	333	207	62
2. Area lying South of an East/West line running through Selkirk but <u>excluding</u> Winnipeg.	572	40	7	555	77	14
3. Area lying North of an East/West line running through Selkirk and East of a North/South line running through Hodgson.	132	5	4	131	15	11
4. Area lying North of an East/West line running through Selkirk, East of a North/South line running through Grand Rapids and South of an East/West line running through Grand Rapids.	117	3	3	116	6	5
5. Area lying North of an East/West line running through Selkirk, West of a North/South line running through Grand Rapids and South of an East/West line running through Grand Rapids.	244	6	3	236	20	8
6. Area North of an East/West line running through Grand Rapids.	95	13	14	94	21	22
MANITOBA PROVINCIAL TOTALS	1,493	232	16	1,465	346	24

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN SASKATCHEWAN

Survey Date
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Regina.	105	49	47	105	71	67
2. Area lying South of an East/West line running through Qu'Appelle but <u>excluding</u> Regina.	579	53	9	574	89	15
3. Area lying North of an East/West line running through Qu'Appelle and South of an East/West line running through Humboldt.	739	66	9	734	107	15
4. Area lying North of an East/West line running through Humboldt and South of an East/West line running through Nipawin.	455	34	7	455	51	11
5. Area North of an East/West line running through Nipawin.	150	3	2	150	10	7
SASKATCHEWAN PROVINCIAL TOTALS	2,028	205	10	2,018	328	16

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN ALBERTA

SURVEY DATA
June 1974

Geographic Area	October 1, 1974			July 1, 1975		
	Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Lethbridge.	53	16	30	53	24	45
2. Area South of an East/West line running through Brooks but <u>excluding</u> Lethbridge.	303	30	10	307	46	15
3. Calgary.	328	149	46	327	190	58
4. Area North of an East/West line running through Brooks and South of an East/West line running through Rocky Mountain House but <u>excluding</u> Calgary.	423	44	10	424	73	17
5. Edmonton.	328	167	51	329	219	67
6. Area North of an East/West line running through Rocky Mountain House and South of an East/West line running through Redwater but <u>excluding</u> Edmonton.	404	42	10	408	67	16
7. Area North of an East/West line running through Redwater and South of an East/West line running through Peace River.	313	32	10	317	56	18
8. Area North of an East/West line running through Peace River.	43	5	12	44	5	11
ALBERTA PROVINCIAL TOTALS	2,195	485	22	2,299	680	30

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
AT BRANDED RETAIL OUTLETS IN BRITISH COLUMBIA

SURVEY DATE
June 1974

Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
1. Vancouver and New Westminister.	714	257	36	707	340	48
2. Mainland area South of an East/West line running through Kamloops but <u>excluding</u> Vancouver and New Westminister.	1,089	178	16	1,097	272	25
3. Victoria.	158	40	25	146	57	39
4. Vancouver Island but <u>excluding</u> Victoria.	396	44	11	394	77	20
5. Mainland area North of an East/West line running through Kamloops and South of an East/West line running through Prince George.	374	63	17	375	106	28
6. Area North of an East/West line running through Prince George.	266	43	16	266	61	23
BRITISH COLUMBIA PROVINCIAL TOTALS	2,997	625	21	2,985	913	31

SURVEY RE PLANNED AVAILABILITY OF UNLEADED GASOLINE
 AT BRANDED RETAIL OUTLETS IN YUKON & NORTHWEST TERRITORIES

SURVEY DATE
 June 1974

Geographic Area	<u>October 1, 1974</u>			<u>July 1, 1975</u>		
	<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>		<u>Estimated Total Outlets</u>	<u>Estimated Outlets having Unleaded Gasoline</u>	
		Number	% of Total		Number	% of Total
<u>YUKON</u>						
1. Total Area.	39	1	3	40	3	8
<u>NORTHWEST TERRITORIES</u>						
1. Total Area.	24	2	8	23	3	13

