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PRESENT AND PLANNED AVAILABILITY OF UNLEADED GASOLINE AT BRANDED RETAIL OUTLETS IN CANADA

JUNE 1975



**Industry, Trade
and Commerce**

**Industrie
et Commerce**

Present and Planned Availability of Unleaded Gasoline

At

Branded Retail Outlets in Canada

Survey Carried Out

By

Canada.

Department of Industry, Trade and Commerce]

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Ottawa, Ontario

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June 1975

Introduction

This survey is an up-date of a similar review published by the Department in June 1974. The purpose is to provide a measure of the availability of unleaded gasoline at retail outlets throughout Canada as of May of this year and to provide an indication of what may be expected in May 1976.

Survey Method Employed

The following 22 companies were involved with the current survey:

BP Canada Limited
*Caloil Inc.
*Canadian Tire Corporation Limited
Federated Co-Operatives 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
*Pioneer Petroleums
*Radio Oil Limited
Shell Canada Limited
*Speedway Oil Service Limited
Standard Oil Company of British Columbia Limited
Sun Oil Company Limited
Texaco Canada Limited
Turbo Resources Limited
Union Oil Company Canada Limited

* Not included in the 1974 survey.

The same geographic areas were used as in the 1974 survey. These had been obtained by dividing the country 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. Actual number of total branded retail outlets as of May 1, 1975 and the forecast number for May 1, 1976.
2. Actual number of outlets at which unleaded gasoline was available as of May 1, 1975 and the forecast number for May 1, 1976.

Survey Results

The composite data obtained as a result of this survey are given in the attached tables.

For the country as a whole, unleaded gasoline was available at over 6,300 retail outlets as of May 1, 1975, and this represented 23% of the total 27,500 retail outlets covered by this survey. The surveyed companies plan to add an additional 850 unleaded gasoline outlets by May 1, 1976 so that this type of gasoline will then be available at 26% of the total gasoline retail outlets.

As expected, the distribution of unleaded gasoline outlets is not uniform throughout the country. In urban areas and along such heavily-travelled roads as Ontario's Highway 401, unleaded gasoline is available at almost one out of every two branded retail outlets. However, in non-urban areas where fewer high volume stations exist, unleaded gasoline is available on the average at only one out of every six branded retail outlets. By May 1, 1976, this is expected to increase to one out of every five outlets.

The general observations made in the report of the June 1974 survey still appear to be valid. Unleaded gasoline is readily available to the urban motorist and to the motorist travelling on or near major roads and heavily-travelled routes. In all but the most remote parts of the country, the motorist travelling in rural areas should find sufficient unleaded outlets to meet his needs, but some planning of refueling stops will be required. It appears that the most inconvenience will continue to be experienced by those non-urban automobile owners who may live some considerable distance from the nearest unleaded gasoline outlet.

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

SURVEY DATE
June 1975

		Actual as of May 1, 1975			Forecast for May 1, 1976		
		Total Outlets	Outlets Having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets Having Unleaded Gasoline	
			Number	% of Total		Number	% of Total
Newfoundland	St. John's	69	30	43	72	34	47
	Remainder of Province	674	30	4	681	57	8
Nova Scotia	Sydney/Halifax/Dartmouth	261	87	33	264	96	36
	Remainder of Province	1,125	189	17	1,114	222	20
Prince Edward Island		253	39	15	252	52	21
New Brunswick	St. John and Moncton	166	49	30	171	59	34
	Remainder of Province	1,311	163	12	1,296	183	14
Quebec	Major Urban	2,447	901	37	2,444	1,023	42
	Remainder of Province	4,120	686	17	3,998	844	21
Ontario	Major Urban, Hwy 401 and QE Hwy	2,511	1,169	47	2,540	1,334	53
	Remainder of Province	6,142	1,068	17	6,129	1,258	21
Manitoba	Winnipeg	348	172	50	354	179	51
	Remainder of Province	1,152	131	11	1,162	141	12
Saskatchewan	Regina	110	61	56	112	66	59
	Remainder of Province	1,892	231	12	1,915	244	13
Alberta	Calgary and Edmonton	633	351	56	632	362	57
	Remainder of Province	1,550	280	18	1,572	291	18
British Columbia	Vancouver/New Westminster/Victoria	674	304	45	647	319	49
	Remainder of Province	1,996	428	22	1,998	455	23
Yukon and Northwest Territories		59	5	8	59	5	8
Totals	Major Urban Centers	7,219	3,124	43	7,236	3,472	48
	Remainder of Country	20,274	3,250	16	20,176	3,752	19
	Total Canada	27,493	6,374	23	27,412	7,224	26

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

Survey Date
June 1975

Geographic Area	<u>Actual as of May 1, 1975</u>			<u>Forecast for May 1, 1976</u>		
	<u>Total Outlets</u>	Outlets having Unleaded Gasoline		<u>Estimated Total Outlets</u>	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. St. John's	69	30	43	72	34	47
2. Area South of an East/West line running through Clarenville but <u>excluding</u> St. John's.	276	13	5	278	25	9
3. Area North of an East/West line running through Clarenville and South of an East/West line running through Springdale.	264	16	6	271	26	10
4. Area North of an East/West line running through Springdale.	134	1	1	132	6	5
NEWFOUNDLAND PROVINCIAL TOTALS	743	60	8	753	91	12

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Sydney	73	11	15	73	12	16
2. Remainder of Cape Breton Island.	175	31	18	175	33	19
3. Halifax/Dartmouth.	188	76	40	191	84	44
4. Area of mainland Nova Scotia East of a North/South line running through Bedford but <u>excluding</u> Halifax/Dartmouth.	376	79	21	372	97	26
5. Area West of a North/South line running through Bedford.	574	79	14	567	92	16
NOVA SCOTIA PROVINCIAL TOTALS	1,386	276	20	1,378	318	23

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

Survey Date
June 1975

Geographic Area	<u>Actual as of May 1, 1975</u>			<u>Forecast for May 1, 1976</u>		
	<u>Total Outlets</u>	<u>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	253	39	15	252	52	21

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Saint John	92	27	29	94	31	33
2. Fredericton and all areas South of an East/West line passing through Fredericton but <u>excluding</u> Saint John.	293	53	18	290	58	20
3. Moncton	74	22	30	77	28	36
4. Area lying between an East/West line running through Chatham and an East/West line running through Fredericton but <u>excluding</u> Moncton.	562	73	13	557	81	15
5. Area North of a East/West line running through Chatham.	456	37	8	449	44	10
NEW BRUNSWICK PROVINCIAL TOTALS	1,477	212	14	1,467	242	16

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Area South of the St. Lawrence River and East of, and including, Rivière-du-Loup.	344	71	21	336	89	26
2. Sherbrooke	116	53	46	116	58	50
3. Jacques-Cartier area.	233	113	48	228	129	57
4. Remainder of the province South of the St. Lawrence River.	1,625	285	18	1,585	333	21
5. Montreal area.	1,438	553	38	1,435	623	43
6. Trois-Rivières.	118	29	25	115	33	29
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.	686	152	22	664	191	29
8. Hull	109	26	24	110	32	29
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.	435	41	9	409	55	13

QUEBEC (CONT)

Survey Date
June 1975

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Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlooks	Outlets having Unleaded Gasoline		Estimated Total Outlooks	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
10. Quebec.	307	107	35	311	117	38
11. Chicoutimi.	126	20	16	129	31	24
12. Area North of the St. Lawrence and East of a North/South line running through Portneuf but <u>excluding</u> Quebec and Chicoutimi.	497	79	16	481	109	23
13. Area West of a North/South line running through Portneuf and North of an East/West line running through Portneuf.	533	58	11	523	67	13
QUEBEC PROVINCIAL TOTALS	6,567	1,587	24	6,442	1,867	29

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Ottawa.	212	116	55	212	137	65
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.	978	126	13	974	154	16
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.	2,065	961	47	2,089	1,096	52
4. That part of the province South of the Brockville/Wiarton line but <u>excluding</u> that area covered by Number 3.	3,305	718	22	3,292	819	25
5. Sudbury and Sault Ste. Marie.	140	55	39	142	59	42
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.	955	120	13	958	159	17
7. Area lying North of an East/West line through Temiscaming and East of a North/South line through Nipigon.	608	74	12	609	83	14

ONTARIO (CONT)

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Survey Date
June 1975

Geographic Area	<u>Actual as of May 1, 1975</u>			<u>Forecast for May 1, 1976</u>		
	<u>Total Outlets</u>	<u>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.	94	37	39	97	42	43
9. Area lying West of a North/South line running through Nipigon but <u>excluding</u> Thunder Bay.	296	30	10	296	43	15
ONTARIO PROVINCIAL TOTALS	8,653	2,237	26	8,669	2,592	30

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Winnipeg.	348	172	49	354	179	51
2. Area lying South of an East/West line running through Selkirk but <u>excluding</u> Winnipeg.	522	79	15	524	83	16
3. Area lying North of an East/West line running through Selkirk and East of a North/South line running through Hodgson.	126	7	6	129	8	6
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.	127	4	3	129	5	4
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.	274	29	11	276	32	12
6. Area North of an East/West line running through Grand Rapids.	103	12	12	104	13	13
MANITOBA PROVINCIAL TOTALS	1,500	303	20	1,516	320	21

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Regina.	110	61	55	112	66	59
2. Area lying South of an East/West line running through Qu'Appelle but <u>excluding</u> Regina.	554	80	14	565	85	15
3. Area lying North of an East/West line running through Qu'Appelle and South of an East/West line running through Humboldt.	709	81	11	713	84	12
4. Area lying North of an East/West line running through Humboldt and South of an East/West line running through Nipawin.	477	60	13	482	64	13
5. Area North of an East/West line running through Nipawin.	152	10	7	155	11	7
SASKATCHEWAN PROVINCIAL TOTALS	2,002	292	15	2,027	310	15

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Lethbridge.	51	18	35	53	19	36
2. Area South of an East/West line running through Brooks but <u>excluding</u> Lethbridge.	304	47	15	309	49	16
3. Calgary.	314	171	54	315	177	56
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.	434	80	18	438	83	19
5. Edmonton.	319	180	56	317	185	58
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.	403	78	19	409	80	20
7. Area North of an East/West line running through Redwater and South of an East/West line running through Peace River.	316	55	17	320	56	18
8. Area North of an East/West line running through Peace River.	42	2	5	43	4	9
ALBERTA PROVINCIAL TOTALS	2,183	631	29	2,204	653	30

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
1. Vancouver and New Westminister.	539	252	47	517	264	51
2. Mainland area South of an East/West line running through Kamloops but <u>excluding</u> Vancouver and New Westminister.	1,035	259	25	1,034	271	26
3. Victoria.	135	52	38	130	55	42
4. Vancouver Island but <u>excluding</u> Victoria.	334	45	13	333	49	15
5. Mainland area North of an East/West line running through Kamloops and South of an East/West line running through Prince George.	365	85	23	365	94	26
6. Area North of an East/West line running through Prince George.	262	39	15	266	41	15
BRITISH COLUMBIA PROVINCIAL TOTALS	2,670	732	27	2,645	774	29

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

Survey Date
June 1975

Geographic Area	Actual as of May 1, 1975			Forecast for May 1, 1976		
	Total Outlets	Outlets having Unleaded Gasoline		Estimated Total Outlets	Estimated Outlets having Unleaded Gasoline	
		Number	% of Total		Number	% of Total
<u>YUKON</u>						
1. Total Area.	36	2	6	36	2	6
<u>NORTHWEST TERRITORIES</u>						
1. Total Area.	23	3	13	23	3	13

