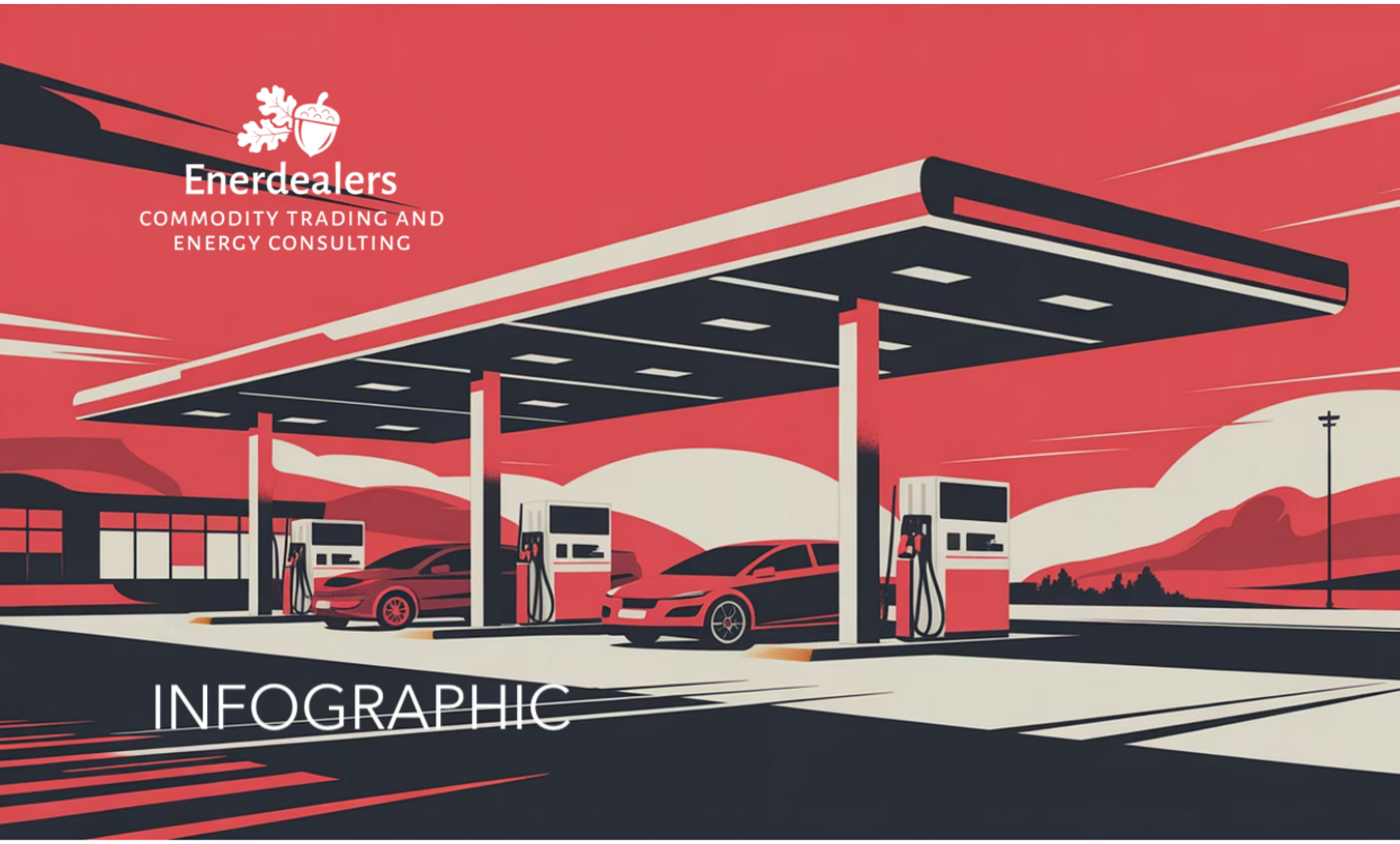


ENERDEALERS OBSERVATORY

Spain's Hydrocarbon Market: Key Shifts in 2022–2024

Discover the changing landscape of fuel consumption across Spain. Swipe to explore the data →

MARKET OVERVIEW

Total Hydrocarbon Consumption

52.04

2022

Million Mt

51.18

2023

Million Mt

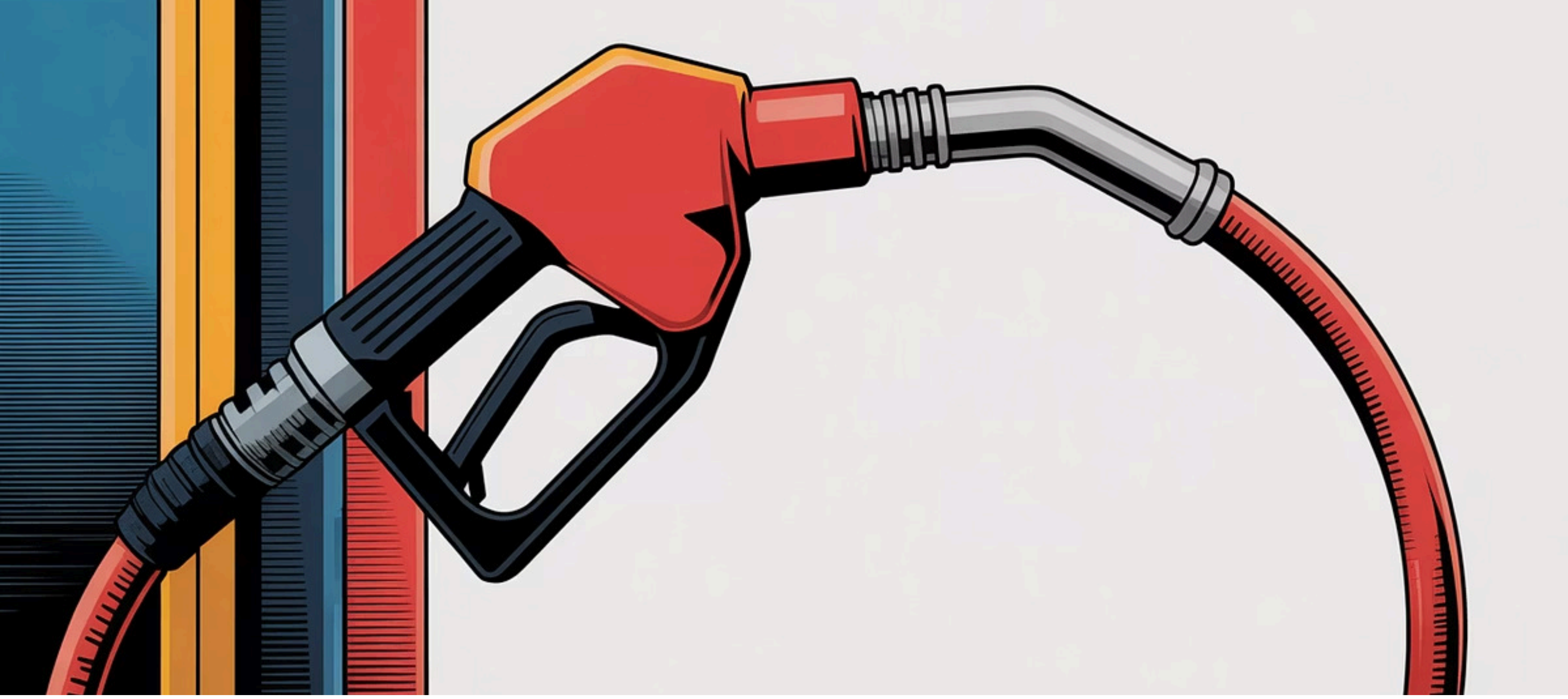
53.34

2024

Million Mt

Recovery After 2023 Dip

Spain's hydrocarbon consumption rebounded in 2024 with a notable **4.22% increase**, reaching **53.34 million Mt** after a slight decline in 2023.



DIESEL TRENDS

Diesel Consumption Declines

2022 Volume

31.66 million Mt representing 60.8% market share

2024 Volume

30.04 million Mt representing 56.3% market share

Cumulative Change

–5.1% decrease over the two-year period

Diesel's Declining Market Share

Total Diesel Consumption

30.04 million Mt in 2024 (-5.1%)

31.66 million Mt in 2022

Shifting Preferences

Diesel's dominance weakens: share drops from 60.8% in 2022 to 56.3% in 2024, reflecting changing consumption patterns.

Independent retail

Accounts for 15.6 million Mt annually, averaging 1.3 million Mt monthly.

GROWTH SECTORS

Gasolines and Kerosene Surge

Gasolines Growth

From 5.76 to 6.53 million Mt (+13.5% cumulative increase)

Aviation Fuels Boom

Kerosene jumps from 5.87 to 7.39 million Mt (+26% cumulative)

RETAIL INFRASTRUCTURE

Service Station Network Expands

2.3%

Network Growth

285 new stations added in 2024

52%

Independent Segment

Approximately 6,694 stations

48%

Refining Groups

Around 5,937 stations

12,631

Total service stations operating across Spain in 2024 (+2.3%)

12,346

Service stations in 2023

Independent Operators

~6,694 sites (52% market presence)

Refining Groups

~5,937 sites (48% market presence)

KEY INSIGHTS

Market Transformation Summary

Diesel Decline

Traditional diesel dominance eroding with 5.1% drop.

Alternative Growth

Gasolines and kerosene show strong upward momentum

Network Expansion

Independent operators maintain competitive edge.

Independent segment

Accounts for 15.6 million Mt annually, 1.3 million Mt monthly.

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