# Consumers International DG Sanco Competition Project

## Instructions for Pilot Phase

27th April 2006

Dear partners,

In order to design our price survey in a way that reflects how the product market in each country works, we need to find out much more about the markets in your country for printer ink cartridges, paracetamol and petrol. We intend to use the pilot phase for two main purposes:

1. To gather information about how the market for each of the products is structured, in terms of which brands are most popular, and what outlets people buy from.

2. To test out how we can store price information in a standard Excel format and transmit those prices to CI for analysis.

Your main task for the pilot phase is to complete the following questionnaire. For all three products, we ask you to gather market share information. We are sure you will already have many ideas on where to search, but here are some additional ideas for sources:

- Statistical yearbooks published by the national statistical offices
- Any reports or decision published by the national competition authority or any other relevant regulatory authority in the investigated market (sometimes even a report from another country, like the UK OFT reports, may be helpful to get an idea of what the market looks like and what to expect)
- Any decisions published by DG COMP/European Courts (CFI and ECJ) in the investigated markets
- Any report by the trade body in the investigated markets
- OECD reports (as available from the internet or libraries)
- Any academic article (one way to proceed is to look at scholar.google.com - not everything will be available for download, but you can often find one version that is; the other way is to contact a university and ask who's the specialist in the area you are investigating - there is always someone somewhere)
- Google search (by far the most economical way to proceed)
- Publicly available summaries of the paid reports by market research companies (or ideally the reports themselves, if you have money to spare ;-)

- Companies' websites (annual reports often provide an interesting read)

Partners can use the listserve as a way of discussing where this information can be found, suggesting additional useful sources as you come across them, asking for ideas and help etc.

For all questions, please gather information for the **last full year's sales wherever possible**, and tell us how up to date your data is.

**Availability of market share information will vary greatly from country to country. If you find if difficult to obtain the specific information requested on this questionnaire, do not despair – this is in itself a useful finding! Please record your difficulties on the questionnaire, and provide us with as much information as you can in your own words, to describe your knowledge of how each market works.**

**Spreadsheet**

In addition to completing the questionnaire, we would like you to carry out a small-scale price collection exercise and store your data in an Excel spreadsheet. This will enable us to check for problems and consistency in using a spreadsheet to store and share our price data.

Please collect 5 prices for the top selling printer cartridges of each of the three brands you name in Q9 of our questionnaire (ie three types of cartridge in total, 15 prices in total). Please use the spreadsheet format attached with these instructions. There are three sheets within the spreadsheet, one for each brand of cartridge.

Ensure these prices are in euros, inclusive of any taxes, but not subject to special offers or postage costs. It doesn't matter what sorts of shop you collect prices from, but please try to use the types described below (Q12) and tell us on the spreadsheet what type of shop you used.

As you collect the prices and complete the spreadsheet please make a note of any questions or problems you have with collecting and submitting the price information so we can ensure we address these before starting the large-scale price collection exercise.

Please return completed questionnaires and spreadsheets to Azzizza at CI by the **31st May**. We will then discuss the results at our workshop in July. Please contact Azzizza if you have any questions.

# QUESTIONNAIRE

## Printer ink cartridges

In this section we use the term **origina**l to refer to cartridges sold by printer manufacturers; and **generic** to refer to cartridges that are not made by the printer manufacturer.

**The cartridges themselves**
In order to find out more about concentration in the cartridge market, and to find a common model across all countries, we'd like you to find out about top-selling original cartridges for a home inkjet printer. We'd like you to collect this information for HP, Canon and Epson, plus any other leading brands. At this stage we are not specifying black or colour cartridge – we want to know what sells most in your country. In addition to finding out what the top-sellers are, we'd like you to find out how your printer cartridge market is structured by gathering market share information.

1. What volume of cartridges is sold in your country each year?

*With respect to this question, generally speaking, there is no data. We are waiting for some information.*

2. Are there any particular trends or regional patterns that you observed in terms of the type of products and volumes sold or places and ways in which they are sold? Is there much cross-border trade?

*Yes, there is cross-border trade. After finding the TARIC code (Integrated Tariff of the European Communities) of this product (printer ink cartridges) and after consulting the Foreign Trade Database, we obtained the following results: In 2006, Exports in Spain are likely amounting to 725,5 (thousands of kilograms) with a total of 19.161,1 (thousands of Euros); that means 820 transactions. As to the Exports´ growth rates for 2006 with respect to the same period in the previous year, we can observe the following information:*

| *RATE / WEIGHT* | *RATE / VALUE* | *RATE / NUMBER OF TRANSACTIONS* |
|---|---|---|
| *15,82%* | *9,69%* | *-0,61%* |

*The most number of export transactions were reached with countries such as Andorra, France, Gibraltar, Italy, Portugal, United Kingdom, due to the proximity through both the road network and short sea shipping.*

*Regarding Imports during 2006, we have found the following data:*

| *WEIGHT (thousands of Kilograms)* | *VALUE (thousands of euros)* | *Number of TRANSACTIONS* |
|---|---|---|
| *617,3* | *37.386,8* | *475* |

*With regard to the Imports´ growth rates of the whole year 2006 compared with the same period in the previous year, we can observe the following information:*

| *RATE / WEIGHT* | *RATE / VALUE* | *RATE / TRANSACTIONS* |
|---|---|---|
| *93,86%* | *23,01%* | *1,50%* |

*The rates indicate that the main imports come from: Germany, United Kingdom, USA, Japan, France, China and Italy.*

3. Would you say that the market is evolving or that is it static?

*In terms of volum, there is a moderate growth. In monetary terms, it is static.*

4. Did you observe any segmentation of the market (e.g. differentiation between "upmarket" products and others)?

*We observed a clear segmentation between original and generic cartridges.*

5. What are the top selling cartridges by type and by brand? If possible, please give the sales volumes corresponding to the "top-selling" types and brands.

*NB You may find a ranking of top-selling brands and types with no information about sales volumes. In this case, provide just the ranking, although additional information about volumes and/or revenues would be useful for future analysis.*

*Once we have asked the main manufacturer in this market, we have found out that the top-selling cartridges are the black inkjet cartridges from HP, CANON and EPSON.*

- ***HP**: the top-selling cartridges are: HP Nº 15 for HP Deskjet 810 and HP Nº45 for HP Deskjet 820 & 850*
- ***Epson**: Ref TO61140, TO44140, TO36140,*
  *Source: Epson Iberica S.A.U., José Pereira, Product Manager/Marketing.*
- ***Canon**: The top-selling CANON cartridge is: BCI-3EB (black ink), whith a volume of more than 605,000 units; the second one is BCI-24B (black ink), with more than 500,000 sold units.*

*Source: Consumables & Services Product Manager, Service & Support Group of CANON ESPAÑA, S.A.*

6. Are HP, Canon and Epson the top three best-selling brands?

*YES*

7. If yes, please rank the three according to their sales (please specify if you can what percentage of total cartridge sales they represent). NB: This should be easy to do if you have fully answered the previous question.

8. If brands other than HP, Canon and Epson are amongst the top three in your country, please tell us what these other brands are (specify if you can what percentage of total cartridge sales they represent).

9. Now focus on the three top selling brands only. What are their three top selling models? Please state the name and/or model number of the cartridges.

| | |
|---|---|
| *1st selling brand* | *1. HP Nº 15 and 23 (Black), for Deskjet 810* |
| | *2. HP Nº 23 and 41 (Colour), for Deskjet 820&850* |
| | *3.* |
| *2nd selling brand* | *1.EPSON TO36140* |
| | *2. EPSON TO61140* |
| | *3. EPSON TO44140* |
| *3rd selling brand* | *1.CANON BCI-3EB* |
| | *2. CANON BCI-24B* |
| | *3.* |

*NB if any of these cartridges include a printer head, please tell us.*

If HP, Canon and Epson are not represented on the list of brands in question Q10, please state the three best selling models for these brands too.

10. Please list the percentage market share of the whole printer ink cartridges market belonging to HP, Canon and Epson along with that of the other brand and non-brand

(generic) suppliers. *If possible, please express market shares in terms of the total volume of cartridges sold, i.e. individual market shares will be calculated as a percentage of the total volume of cartridges (branded and generic) sold.*

| | % Market share of whole market (branded and generic) |
|---|---|
| HP | |
| Canon | |
| Epson | |
| Other brands (please list) | |
| Generic | |

11. If possible, please state what percentage of the total volume of cartridges sold in your country is branded and what percentage is generic.

*NB: If information about cartridge sales in your country is only available separately for branded and generic cartridges, please consider branded and generic cartridges to be separate markets and provide market shares for branded and generic products separately.*

12. Thinking now about **where the cartridges are sold, p**lease tell us the three types of shops/outlets which sell the most printer cartridges, using the following definitions for type if possible:

Types:

- Specialist computer/electrical **chain**
- **Independent** specialist computer/electrical store
- Hypermarket
- Supermarket
- Online specialist store
- Other (please describe)

Top three outlets for **branded** cartridges

| Name of outlet | Type | % share of overall original cartridge sales |
|---|---|---|
| *1.El Corte Inglés* | *Hypermarket* | |
| *2.Carrefour* | *Hypermarket* | |
| *3 Ofiline* | *Specialist online store* | |

Top three outlets for **generic** cartridges

| Name of outlet | Type | % share of overall generic sales |
|---|---|---|
| *1.Boulanger, Pc City* | *Specialist computer/electrical chain* | |
| *2 .Bruneau* | *Specialist online store* | |
| 3. | | |

13. What were you most useful sources of information for this market?

*First, we have contacted the National Office of Statistics. In Spain, it is the INE (National Institute of Statistics) but it does not have any data for this particular product. Then we have contacted famous market research companies such as Pricewater House, Info Trend/Cap Ventures and we are still waiting for their answers. GFK informed us that they have relevant information but they cannot provide any information free of charge.*

*AETIC (Association of Electronics, Information Technology and Telecommunication Companies in Spain) was more open to our requests; they promised to send us the following information by separate mail: "ANNUAL REPORT OF THE SPANISH ELECTRONIC, INFORMATION TECHNOLOGY AND TELECOMMUNICATION SECTOR". We have not received it yet but they have advanced the following data:*

*With respect to the cartridges segment, the following data appear in their Report:*

*Year 2004: National market = 441 millions € (6% increase compared to the previous period)*

*Year 2005: National market = 477 millions € (8% increase compared to the previous period)*

*From the National Agency of Tributary Administration as well as from the Database of Foreign Trade we have obtained the information regarding the cross-border trade.*

*Finally, we have contacted by phone as well as by e-mail the manufacturers such as HP, Canon, Epson, Lexmark, Jettec, etc., but we have realized that the market is incredible impenetrable. Their market researchs are made by consultants like GFK (for HP, Canon and Epson). After several phone conversations we could receive some information about models and volumes from the Department of Consumables & Services Product Manager but we are still waiting for more detailed information.*

## Paracetamol

1. What volume of paracetamol is sold in your country?

*The data refers to the SNS (National Health System), and only includes medicines sold by prescription.*

*Total sales of medicines to SNS: 10,175,405.40 (thousands €)*
*Percentage of generic medicines (volume): 24,98%*
*Percentage of branded medicines (volume): 75,02%*
*Total 100%*

*Percentage of generic medicines (price): 7,35%*
*Percentage of branded medicines (price): 92,65%*

*Total 100%*

*Paracetamol sales: 4,40% of the total of sold units (we could not find the total of sold units)*
*Average price: 2,97€*

***It is the most sold medicine***

*There are specialities subject to reference prices (specialities which belongs to a group and can be either generic or branded ones)*
*In the global market of medicines, the average price of the branded specialities which are affected by the reference prices, (9.60 euros), is 40% lower than the average price of the branded specialities not affected by the refence prices (15.88 euros).*
*However, in the case of generic specialities it is just the opposite, the average price of those which are subject to reference prices (7.46 euros) is 8,4% higher than the average price of the generic specialities not affected by the refence prices (6.88 euros).*

*2.* Please describe the paracetamol market in your country, in terms of the leading suppliers and their market share (as a % of all paracetamol sales), for both branded and generic paracetamol.

| Branded suppliers | Company | Market share (%) |
|---|---|---|
| *EFFERALGAN* | *BRISTOL-MYERS SQUIBB* | |

| Generic suppliers | Company | Market Share (%) |
|---|---|---|

3. Are there any particular trends or regional patterns that you observed in terms of the type of products and volumes sold or places and ways in which they are sold? Is there much cross-border trade?

*There are no particular trends. The low prices of paracetamol do not encourage the cross-border trade.*

4. Would you say that the market is evolving or that is it static?

*We can observe a trend towards the consumption of higher single doses. In few years, it has been changed from the dose of 300 mgr to 500 mgr and 600 mgr and the current tendency is 1 gramme.*

5. Did you observe any segmentation of the market (e.g. differentiation between "upmarket" products and others)?

*Not especially.*

6. Please tell us what the three top-selling brands of soluble (dissolvable) and non-soluble tablet-form paracetamol are in your country. Please give the name of the brand (eg Panadol) and the company who manufactures it. If possible, please give the quantities corresponding to these "top-selling" brands. Express the quantity either in terms of physical quantity, i.e. grams of active paracetamol contained either in tablets or in soluble form sold in your country, or in terms of revenues, i.e. the quantities of the various types of paracetamol sold times the corresponding prices at which these types of paracetamol were sold (usually average or manufacturer's recommended prices will be sufficient).

*NB I: We are interested in paracetamol-only drugs here, with no other active ingredients.*
*NB II: You may find a ranking of top-selling brands with no information about sales. In this case, provide just the ranking, although additional information about volumes or/and revenues would be useful for future analysis.*

Top three **soluble** (name of brand and manufacturer)

| | Brand | Manufacturer | Quantity or revenue |
|---|---|---|---|
| 1. | *EFFERALGAN* | *BRISTOL-MYERS SQUIBB* | *1.46% units* |
| 2. | | | |
| 3. | | | |

Top three **non-soluble** (name of brand and manufacturer)

| | Brand | Manufacturer | Quantity or revenue |
|---|---|---|---|
| 1. | *GELOCATIL* | *GELOS* | *1.05% units* |
| 2. | | | |
| 3. | | | |

7. Please tell us what type of shop people buy their paracetamol in in your country (we are sorry if you feel you've already given this information in our earlier questionnaire, but this time we are collecting more precise market share information and it helps to have it all in one place).

Please use the following definitions for type if possible:

- Pharmacy chain *(Pharmacies have individual entitlement, so there are no pharmacy chains in Spain)*
- *Independent pharmacy*
- Hypermarket *(here medicines are not sold)*

- Supermarket *(here medicines are not sold)*
- Local grocer/convenience store/mini-mart *(here medicines are not sold)*
- Department store *(here medicines are not sold)*
- Petrol station/ gas station/ garage *(here medicines are not sold)*
- Other (please describe) *(here medicines are not sold)*

Top three outlets for sale of **branded** paracetamol

| Name of outlet | Type | Quantity | Market share (%) |
|---|---|---|---|
| 1. *Pharmacy* | | | |
| 2. | | | |
| 3. | | | |

Top three outlets for sale of **generic** paracetamol

| Name of outlet | Type | Quantity | Market share (%) |
|---|---|---|---|
| 1. *Pharmacy* | | | |
| 2. | | | |
| 3. | | | |

*NB Again, if possible express the quantity of paracetamol sold either in terms of physical quantity or in terms of revenues.*

When we did our pre-pilot research, we found that a pack size of 10 tablets was most common amongst the partners, followed by a pack size of 20 tablets. We now need to double-check this across all partners.

8. What it the best-selling paracetamol pack in your country in terms of shares of the total volume sold?

*- In the SNS (National Health System):*
*1st 40 tablets and 1 gr.*
*2nd 20 tablets and 650 mgr*

9. How popular is the pack size of 10 in 500 mg in terms of shares of the total volume of paracetamol sold?

*It is not popular.*

10. Would you be able to collect prices for:
    10 Non-soluble tablets? *Yes*/No
    10 Soluble tablets? *Yes*/No

11. If the answer to either of these is no, what is the NEAREST pack size you could collect prices for?

*20 tablets and 650 mgr is more popular.*

12. How popular is the pack size of 20 in 500 mg in terms of shares of the total volume of paracetamol sold?

*Quite popular. Furthermore, after researching the apparent contradiction detected in the pre-pilot research that in case of the branded product Termalgin 650 mgr/20 tablets the price was lower (0.98€) than for the packet of 500 mgr./20 tablets (1,40 €), we have found out that this can happen when a particular packing is financed by the National Health Service, therefore, the cost for the consumer is either very low or even null, that means lower than the price of the packing that at market price is lower. In other words, when a particular packing is financed by the State it is more expensive than the packing without financing.*

13. Would you be able to collect prices for:

| | |
|---|---|
| 20 Non-soluble tablets? | *Yes*/No |
| 20 Soluble tablets? | *Yes*/No |

14. If the answer to either of these is no, what is the NEAREST pack size you could collect prices for?

15. What were your most useful sources of information for this market?

a. *Portalfarma.com*
b. *Farmaindustria*
c. *Ministry of Health and Consumer Affairs*
d. *Canal of Pharmacy. COFM*

*Note: Impenetrable market, obtaining information about sales volumes, market shares, etc... is very difficult. The Administration has only information regarding medicines financed by the National Health Service; that in the case of paracetamol is not very significant as due to the low price of this product, many consumers buy it without prescription.*
*We are waiting for more global data from the General Council of Pharmaceutical Colleges in Spain.*

## Petrol

1. Describe the market for petrol. Think of the market in terms of the following questions: What volume of petrol is sold in your country and which brands and types? Who are the brand owners/suppliers/producers? Are retailers vertically integrated with

suppliers and producers (i.e. do they belong to the same company group)? Do you know where petrol is sold and in what fashion (e.g. type of retail outlet, etc.)? Are there any particular trends or regional patterns that you observed in terms of the type of products and volumes sold or places and ways in which they are sold? Would you say that the market is evolving or that is it static? Is there much cross-border trade?

*With the approval of the Law 34/1998, related to the Hidrocarbon sector, the basis for a liberalized market was established. Since the 9th October 1998 (when the Lawhas been put into effect), petrol prices in Spain are liberalized, but the reality shows that the liberalization on the petrol market has been hardly succesful. Repsol YPF, Cepsa and BP are still monopolizing the petrol business; in fact, some of them, like Repsol YPF, have been fined by the Court of Competence Protection, because they continue fixing the petrol price.*
*Repsol YPF, Cepsa and the British group BP are making efforts since years to avoid the advance of liberalization. The Ministry of Industry, Tourism and Commerce publishes on its web every day the list of the 20 cheappest service stations in Spain. It is really strange to find on this list a petrol station which belongs to some of the three main operators. Repsol YPF as well as Cepsa have been fined several millions of euros by the Court of Competence Protection.*

*Volume of petro sales (kt: thousands of tons)*

*Annual Consumption 2004 ............ 7.715*

*Unleaded 95 ............................... 5.956*
*Unleaded 98 .................................. 879*
*Unleaded 97 .................................. 425*
*Total Consumption 2005 ........... 7.260*

*The consumption of unleaded fuel 95 amounts to 5.9 millions of tons in 2005, it represents 82% of the total motoring fuels. The consumption of unleaded fuel 98 represents 12% and in case of unleaded fuel 97, it represents 6% of the total.*

*February 2006 - data of the last 12 months in thousands of tons:*

*Unleaded 95 ...............................6.011*
*Unleaded 98 ..................................882*
*Unleaded 97 ..................................328*
*Other fuels ..................................9*
*Last twelve months (Total) ..........7.230*

*The trend towards a lower national consumption is constant like in previous years as consequence of the readjustment which is suffering the Spanish market caused by the unstoppable dieselization in the automobile sector. The unleaded fuel 95 has been the* *most demanded fuel. The consumption peaks of unleaded fuels 95 and 98 are caused due to the higher consumption in summer months.*

*Usually, the type of distribution applied to petrol is the exclusive purchase; where the distributor undertakes to be supplied by one producer.*

*The Spanish market is a dynamic market with purchases and sales among the different companies and with a higher market share of distributors different from the traditional firms, as in the case of hypermarkets. The last examples are as follows:*
*In 2006, SARAS buys the Service Stations of Caprabo. In 2005 DISA has bought the SHELL business.*
*New firms entered the market and other ones had to leave it due to group strategies or due to difficulties to grow in a sector where a few companies control more than 50% of the market, or due to mergers with other competitors.*
*But, in reallity, there is a scarce dispersion of prices in the fuel market and stagnancy of the service stations.*

*Exports during 2005 related to the product: Fuel for motors, with a content of fuel <= 0,013 g/l, with an index of octanes investigated RON >= 95 but < 98:*

| | |
|---|---|
| *UNITS (Thousands litres ):* | *3.362.598* |
| *NUMBER OF TRANSACTIONS:* | *1.215* |
| *VALUE (Thousands of euros):* | *562.192,1* |
| *WEIGHT (Thousands of Kgs.):* | *1.317.607,3* |

*Imports during 2005 related to the product: Fuel for motors, with a content of fuel <= 0,013 g/l, with an index of octanes investigated RON >= 95 but < 98:*

| | |
|---|---|
| *UNITS (Thousands litres):* | *603.705* |
| *NUMBER OF TRANSACTIONS:* | *81* |
| *VALUE (Thousands of euros):* | *107.074,6* |
| *WEIGHT (Thousands of Kgs.):* | *257.708,4* |

2. Who are the top petrol RETAILERS in your country and what is their market share of overall petrol sales? Please also tell us what type of retailer they are, using the following definitions:

- major petrol chain
- independent
- hyper/supermarket
- other (please describe)

*The market share of the three biggest companies that operate in Spain (Repsol YPF, Cepsa and BP) has hardly varied in the last years and amounts to 67% of the total.*

*The number of service stations in Spain amounts to 8.638 (Spain, 31st December, 2005):*

*Wholesaler:*
*REPSOL YPF : 3.618 (42%)*
*CEPSA: 1.521 (18%)*
*BP: 635 (7%)*
*DISA: 485 (5%)*
*AGIP: 313 (4%)*
*GALP: 223 (3%)*
*MEROIL: 200 (2,5%)*
*ERG: 124 (1,4%)*
*ESSO: 86 (0,9%)*
*ESERGUI: 92 (1,06%)*
*SHELL: 0*
*TEXACO: 60 (0,6%)*
*Q-8: 37 (0,4%)*
*TOTAL: 14 (0,16%)*
*SARAS: 0*
*HYPER/SUPERMARKETS: 187 (2,1%)*
*COOPERATED PRIVATE LABELS: 1000 (11,%)*

*TOTAL: 8638*

3. What percentage of the total retail petrol market do super and hypermarkets taken together represent in your country?

*According to the summary collected by the distribution canals of March 2006, the sales outside the service stations, that means in hypermarkets, amounts to:*
*petrol 98......... 4,4 %*
*petrol 97.........10,4 %*
*petrol 95......... 3,7 %*

*In 2005, the average sale per service station was 3.4 millions of litres. The average sale in hyper/supermarkets was approx. 5 millions of litres.*

4. Thinking about the total price for a litre of unleaded petrol, how much of the total price is made up of taxes, in percentage terms? *(You may find it useful to ask your ministry of finance/tax authority for this piece of information.)*

*Data of May-2006:*
*51 % are taxes*

*Price: 1,094 euros/litre divided as follows:*

*Price without taxes: 49 %*
*Taxes: 51 %*

*Pbt – Ci= 0,101*
*Ci= 0,435*
*Special Taxes= 0,371*
*IVMDH= 0,038*
*IVA= 0,149*

*Explanation of abbreviations:*
*Pbt: Price before taxes*
*Pbt – Ci: Fix costs of Logistics and Commercialization + Amortization + wholesaler and retailer margins*
*Ci: International market price = Cost of the product*
*IVMDH: State Tax and arithmetic average of the autonomic section*
*IVA: VAT*

5. Is there an area of your country where you think competition may be different to the rest of the market, and which you would like to include in the research (eg a border area)? If so, what area would you pick and why?

*It is different in Cataluña due to its proximity to France. The petrol in Spain is cheapper and some French inhabitants cross the border to Spain in order to fill up the tank of their cars (at the same time they buy alcohol and tobacco).*

*It is also different in some rural areas where there is a long distance between the service stations and some inhabitants who have a long way if they want to select the petrol station. Thus, they cannot compare different prices.*

*We know that this happens but we do not know the percentages because there is no data in this field.*

6. What were your most useful sources of information for this market?

*Internet:*

- *Confederation of Service Stations*
- *Spanish Association of Operators of Petrol products*
- *National Commission of Energy*
- *Ministry of Industry, Tourism and Commerce*
- *Oil-bearing Companies which operate in Spain, press and private studies and reports*

*The e-mails we have sent in order to receive the information that we could not find in the internet, have not been answered yet.*

*OTHER INTERESTING INFORMATION:*

*Current situation:*
*4,000 service stations of all Spain (which are grouped in the Spanish Confederation of Service Station Managers) were convoked to close their stations on last 25th May due to the fixation of petrol prices by the petrol companies in order to demand a greater competition in the sector.*
*The strike reflects the small success of the liberalization on the petrol market where Repsol YPF, Cepsa and BP continue monopolizing the petrol business. This protest pretends to make the Administration aware so that they make pressure to the operators and they observe the sentences promulgated by the Court of Competition Defense that prohibit them to continue fixing the final prices of fuel; as well as to make clear the need of a market free of real competition that allows the service station owner to be able to decide without having to be put under null contracts or facts in fraud of exclusivity law with the operators, which would be good for the consumer.*
*Finally, the unemployment was called off when the Ministry of Industry promised to meet and to listen to the demands of this managers' association.*

*Vouchers:*
*Retailers think that fuel is a good inducement to catch new clients. Some shops (as a way to compete with hypermarkets), Associations of motorists, Confederations of Retailers and hypermarkets distribute vouchers, exchangeable by cheques of gasoline and others offer discounts to the clients that have the cards of their shops (fidelity cards). The generalization of fidelity instruments is increasing: cards, payment cards, promotions, professional cards of payment to fleets, etc.*

*Autonomic taxes:*
*Some Autonomous Communities apply the IVMDH (autonomous section regarding retail sales of particular hydrocarbons), for example, the Community of Madrid applies it since August 2002 (1.7 cents of euro per liter); the Autonomous Communities of Galicia and Asturias apply it since January 2004 (1 cent of euro per liter); in Cataluña since August 2004 (2.4 cents of euro per liter - maximum amount allowed for this section). In general, the autonomic rates that tax fuels are destined to finance the sanitary deficit.*

*Frauds:*
*In 1998 the Organization of Consumers and Users, thanks to the testimony and the proofs provided by two workers of petrol stations, reported a swindle that was being committed, consisting of using a handle situated inside of a petrol station, that altered the impulses of the petrol pump. The accused were fined.*