



# Kalibrate Site Analysis

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

JSJ Property Holdings LLC

Order no. 7230

January 09, 2024

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January 09, 2024



JSJ Property Holdings LLC  
8118 Masi Drive  
Rancho Cucamonga, CA  
91730

Order no: 7230  
Lat: 33.9283  
Long: -116.9667

Dear Mr. Jas Sondh,

Attached you will find:

- A summary of four (4) simulation scenarios depicting gasoline, diesel, convenience store, quick service restaurant, and car wash projections.
- Detailed projection analyses
- Associated reports for your site located at: East 6th Street and Pennsylvania Avenue, Beaumont, CA

The site was evaluated as being an interstate location and is currently undeveloped. The study was based on site-specific information supplied by you as reflected in the site recommendation forms.

The attached volume projections are based upon competition as it existed at the time of the survey. If any existing competitive outlets are rebuilt or modernized, or new outlets are opened within the trading area, these projections could be negatively impacted.

Please note the subject site's potential gasoline volume projection and diesel fuel volume projection were derived independently of each other. The subject site's potential convenience store sales projection excludes revenues generated by lottery, any liquor other than beer, money orders, car wash and quick service restaurant sales. The quick service restaurant sales projections were generated independent of the convenience store

Please be advised that any deviation in the facility constructed compared to the attached site plan and site recommendation forms may impact this site's estimated volume potentials. These estimated volume potentials have been developed in accordance with Kalibrate's established procedures and Kalibrate does not warrant that the estimated volume projections will be achieved. Kalibrate recommends that the developer and financial provider for the project perform their own financial analysis for the subject site.

Do you want to test additional strategies? Competitor changes? Demand changes? Kalibrate can run additional tactics for you at this location for \$500 per tactic, if purchased within 3 months of the original report.

We have enjoyed working with you on this study. If you have any questions then please contact us.

Sincerely,

A handwritten signature in black ink, appearing to read "S. Caudle", written over a light blue horizontal line.

Steven Caudle

Kalibrate

# Summary of scenarios and results

Category	Volumes										Prices	
	Gas		Diesel		CStore		QSR		Wash		Gas	Diesel
	Brand	Projected Volume	Brand	Projected Volume	Brand	Projected Volume	Brand	Projected Volume	Brand	Projected Volume	Price	Price
NR7230 Base Case	76	● 98	76	● 12	Independent	● 108	Sbarro	● 27	Independent	● 2117	● 476.9	● 524.9
NR7230 Case 2	Independent	● 106	Independent	● 12	Independent	● 98	Sbarro	● 25	Independent	● 2084	● 451.9	● 499.9
NR7230 Case 3	76	● 101	76	● 12	7-Eleven	● 149	Sbarro	● 28	Independent	● 2064	● 476.9	● 524.9
NR7230 Case 4	76	● 98	76	● 12	Independent	● 108	Sbarro	● 27	Independent	● 1683	● 476.9	● 524.9

In total, 4 simulations have been carried out to project gasoline, diesel, c-store, quick service restaurant, and wash. The simulations chosen were the result of thorough consultation with the site contact Jas Sondh. These simulations are run within Kalibrate Planning®, utilizing detailed gas, diesel, car wash, quick service restaurant and c-store data across the US and specifically in the Beaumont, CA area.

### BASE CASE:

- Build a 76 branded fueling station, with 6 pumps / 12 fueling positions of gasoline, sharing space with 2 pumps / 4 fueling positions of diesel, with 1 Tesla branded EV charging station
- Set the fuel prices to 5 cents below the Shell (#110005) branded site located at 501 Highland Springs Ave
- Build an independently branded convenience store in a 4,700 sq. ft. building, with 15 dedicated parking spaces and 14 cooler doors, and offer Deli, Wine/Liquor, Dispense Coffee, and cold beer, with kitchen inside c-store
- Set the hours of operation for fuel to 24 hours per day / 7 days per week
- Set the hours of operation for c-store to 24 hours per day / 7 days per week
- Inside the c-store, build a Sbarro branded quick service restaurant, and offer Wetzels Pretzels branded quick service restaurant
- On the lot, build an independently branded long tunnel car wash

### CASE 2: Adopt the site characteristics and assumptions of the Base Case, except:

- Brand fuel as independently branded
- Set the fuel prices to 30 cents below the Shell (#110005) branded site located at 501 Highland Springs Ave

### CASE 3: Adopt the site characteristics and assumptions of the Base Case, except:

- Brand c-store as 7-Eleven

### CASE 4: Adopt the site characteristics and assumptions of the Base Case, except:

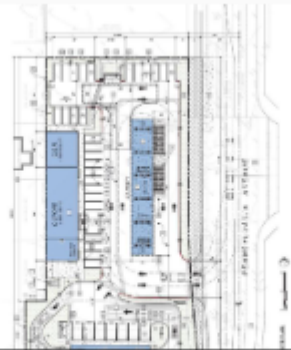
- On the lot, build an independently branded in bay car wash

Detailed findings and analysis can be found throughout this report

# Subject site details

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



### General

Appearance	Average
Operation Type	Independent
Site Direction	W
Site Location	Inside
Site Name	76
Visibility	Average

### Location/Ratings

Urbanity	Urban
Stop Fuel Or Truck	x
Oasis	x
Low Small Sign	x
Location Type	Interstate
Landscaping	Minimal
Hi Rise Sign	x
Has Canopy	✓

### Traffic

Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	5900
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru Lanes	0
Secondary St Remote Access	x
Secondary St Traffic Count	0
Street1 Near Traffic Control	x
Street2 Near Traffic Control	x

### Location/Ratings

Blockage	x
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JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



### Fuel

Diesel Offered	✓
Gas Offered	✓
Layout of Forecourt	Parallel
Diesel Brand Name	76
Gas Brand Name	76
Bypass Lanes	2

### Prices/Service/Hours

Attend Service	x
Average Discount	10
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	524.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	476.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

### Cstore

Cash Registers	2
Cooler Doors	14
Dedicated Park. Spaces	15
External Merchandising	Average
Hypermarket	x
Shop Brand	Independent
Shop Offered	✓
Shop Type	C-Store

### Carwash

Wash Offered	✓
Wash Brand Name	Independent
Short Tunnel	x
Long Tunnel	✓
Bay Car Wash	x

### Other

Has Toilets For Customers	✓
Has ATM	✓
Auto Repair Bays	0

### Pumps/Fueling Positions

Diesel Pumps	2
Diesel SFP	4
Fueling Position Penalty	x
Gas Pumps	6
Gas SFPs	12
Pump Islands (info only)	6

### Products

Bakery	x
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Cave
Cstore Selling Area	4700
Deli	✓
Has Kitchen	✓
Offers Wine Liquor	✓

### Food

QSR Brand Name	Sbarro
QSR Has Drive Thru	x
Catering	✓

### Volumes

Car Wash Volume	2117
Diesel Volume	12
Gas Volume	98
QSR Sales	27
Shop Volume	108

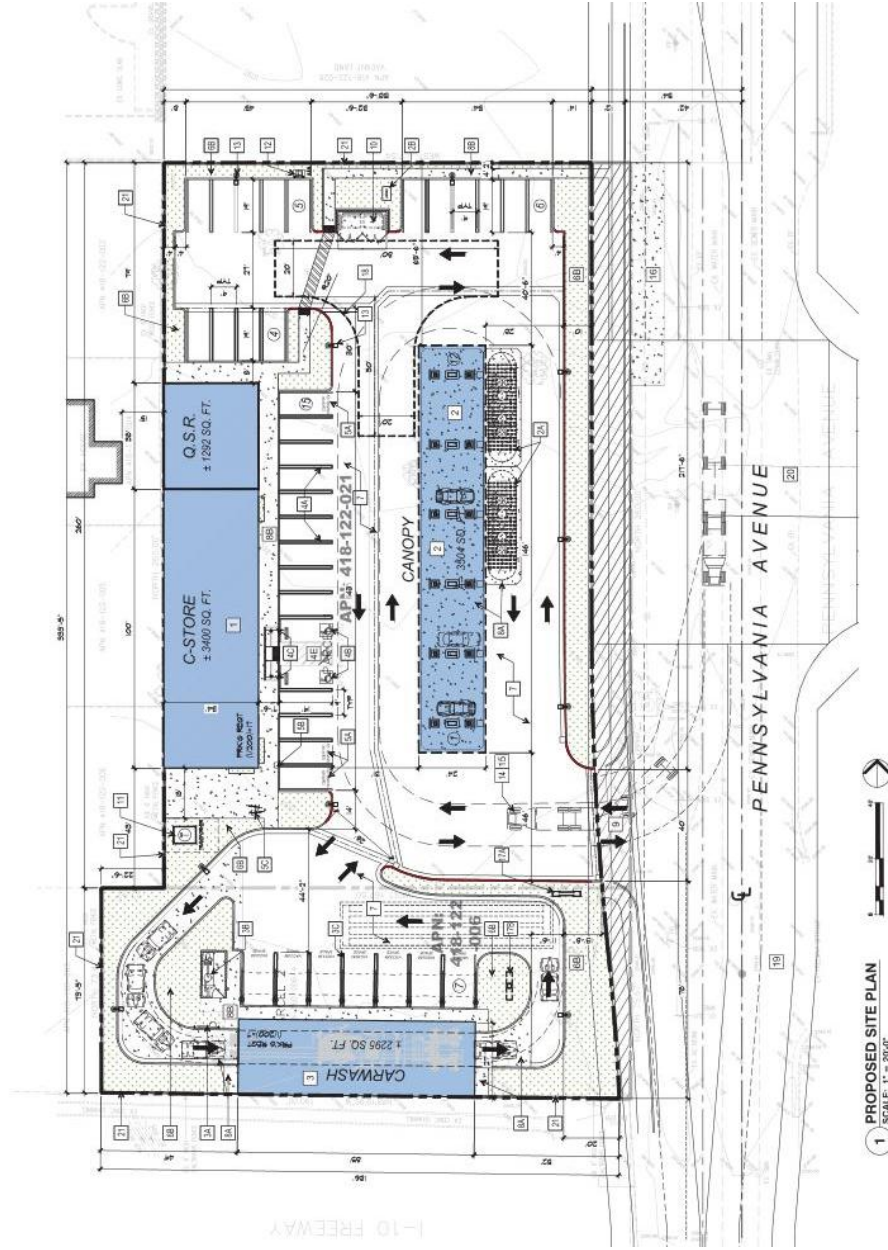
### Prices/Service/Hours

Monday Sunday Hours Open	24
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# Site Plan

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



1 PROPOSED SITE PLAN  
SCALE: 1" = 20'-0"

# Simulation detail

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Attribute	Base Case	Case 2	Case 3	Case 4
GasSelf Grade1 Price	476.9	451.9	476.9	476.9
GasBrand Name	76	Independent	76	76
Gas Projection	98	106	101	98
Variance to Base		▲ +8 [+8%]	▲ +3 [+3%]	
DieselSelf Grade1 Price	524.9	499.9	524.9	524.9
Diesel Brand Name	76	Independent	76	76
Diesel Projection	12	12	12	12
Shop Brand	Independent	Independent	7-Eleven	Independent
CStore Projection	108	98	149	108
Variance to Base		▼ -10 [-9%]	▲ +41 [+38%]	
QSR Projection	27	25	28	27
Variance to Base		▼ -2 [-7%]	▲ +1 [+4%]	
Wash Brand Name	Independent	Independent	Independent	Independent
Bay Car Wash	x	x	x	✓
Long Tunnel	✓	✓	✓	x
Wash Projection	2,117	2,084	2,064	1,683
Variance to Base		▼ -33 [-2%]	▼ -53 [-3%]	▼ -434 [-21%]

### Comments:

All site characteristics, except for fuel brand and c-store brand, fuel price, and car wash facility, remained constant across all simulations.

In the Base Case, when building a 76 branded fueling station, with 6 pumps / 12 fueling positions of gasoline, sharing space with 2 pumps / 4 fueling positions of diesel, building an independently branded c-store in a 4,700 sq. ft. building, setting fuel prices to 5 cents below the Shell (#110005) located at 501 Highland Springs Ave, building a Sbarro branded qsr, and offering Wetzel's Pretzels branded qsr inside the c-store, and building an independently branded long tunnel car wash, the subject site is estimated to achieve 98,000 gallons per month in gas sales and 12,000 gallons per month in diesel sales. The c-store is projected to achieve \$108,000 per month in c-store sales. The qsr is projected to achieve \$27,000 per month in qsr sales. The car wash is expected to see 2,117 cars per month through the wash.

In Case 2, when branding fuel as independently branded, and setting fuel prices to 30 cents below the Shell (#110005) located at 501 Highland Springs Ave, the subject site is estimated to achieve 106,000 gallons per month in gas sales and 12,000 gallons per month in diesel sales. The c-store is projected to achieve \$98,000 per month in c-store sales. The qsr is projected to achieve \$25,000 per month in qsr sales. The car wash is expected to see 2,084 cars per month through the wash.

In Case 3, when branding c-store as 7-Eleven, the subject site is estimated to achieve 101,000 gallons per month in gas sales and 12,000 gallons per month in diesel sales. The c-store is projected to achieve \$149,000 per month in c-store sales. The qsr is projected to achieve \$28,000 per month in qsr sales. The car wash is expected to see 2,064 cars per month through the wash.

In Case 4, when building an independently branded long tunnel car wash, the subject site is estimated to achieve 98,000 gallons per month in gas sales and 12,000 gallons per month in diesel sales. The c-store is projected to achieve \$108,000 per month in c-store sales. The qsr is projected to achieve \$27,000 per month in qsr sales. The car wash is expected to see 1,683 cars per month through the wash.

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

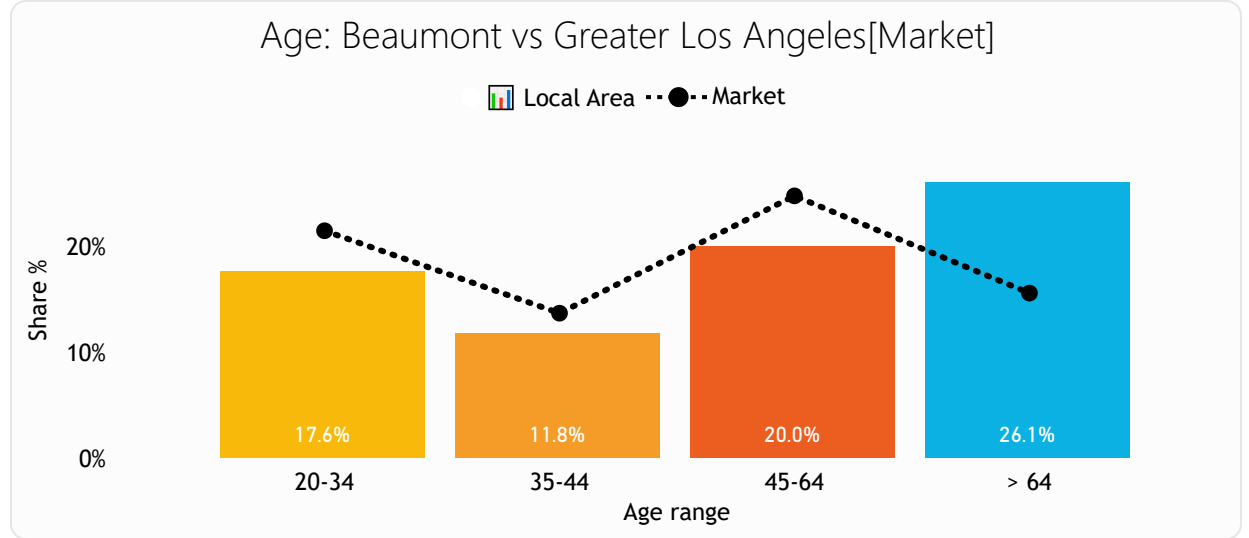
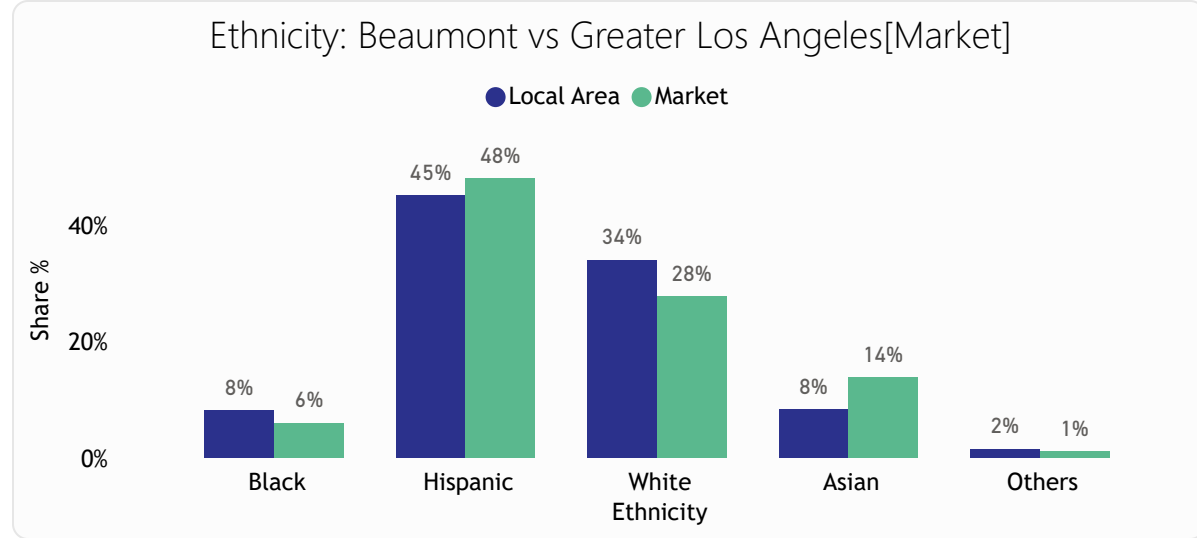
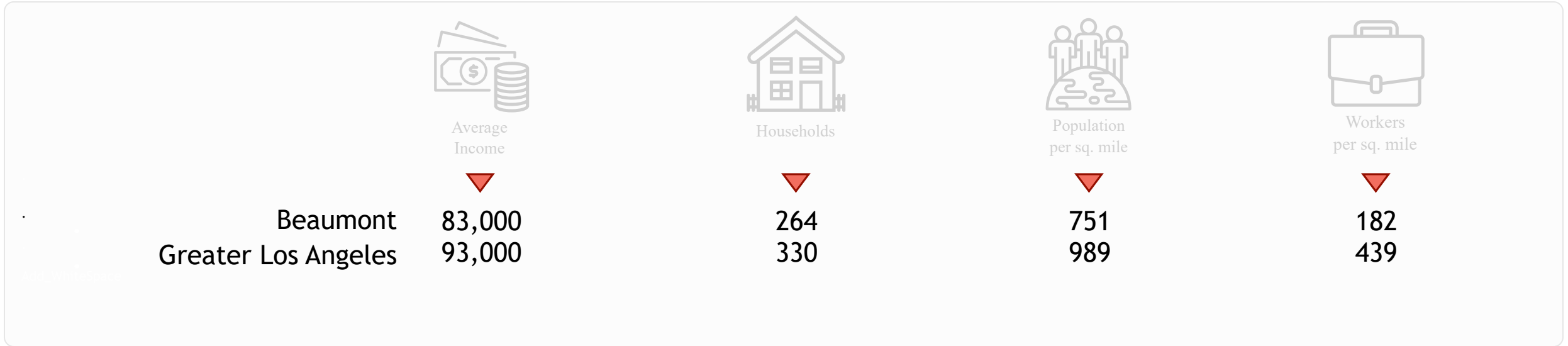
  = Change from base case



# Demographics of the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA




**Comments:** Beaumont is a city located in Riverside County, California. Within a 5 minute drive time, the number of households, the population per square mile, and the number of workers per square mile are all below the market level. The median household income in Beaumont is \$83,000 per year, which is below the Greater Los Angeles market average of \$93,000. Local residents are predominantly Hispanic and aged 20-34 and 64 years old and older.

## Main competitor sites in the local area

## JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Distance	Fuel Logo	Fuel Name	CStore Logo	CStore Name	Gas Volume	Diesel Volume	CStore Volume	QSR Volume	Wash Volume
110002	0.59		Mobil		Mobil	81	15	53		
110001	0.60		USA Gasoline		USA Gasoline	174		49		
51913	0.67		Chevron		Extramile	157	18	142	16	1575
91309	0.74		ARCO		ampm	284	16	200		2200
91310	0.79		Shell		Circle K	136	14	149		1725
110005	1.12		Shell		Shell	59	10	93	12	1450
110004	1.12		ARCO		ampm	285	6	212		
110006	1.14		Chevron		Extramile	121	22	57		
110007	1.16		Mobil		Circle K	91	8	27		925
91509	2.24		Chevron		Extramile	132	17	150		2125

### Comments:

The nearest two existing competitors are a Mobil (#110002) branded site located at 502 Beaumont Ave, and a USA Gasoline (#110001) branded site located at 401 6 St.

The Arco (#110004) branded site at 1696 6 St, performs the best among all fuel sites in the area on gasoline sales, with a total of 285,000 gallons of gas being sold per month. The Arco (#110004) branded site at 1696 6 St, also performs the best among all fuel sites in the area on diesel sales, with a total of 22,000 gallons of diesel being sold per month. The Arco (Ampm) (#110004) branded site at 1696 6 St, performs the best among all c-store sites in the area on c-store sales, with a total of \$212,000 per month. This site's performance can be attributed to it's upgraded facilities and superior merchandising, as well as pricing inside and outside the c-store.

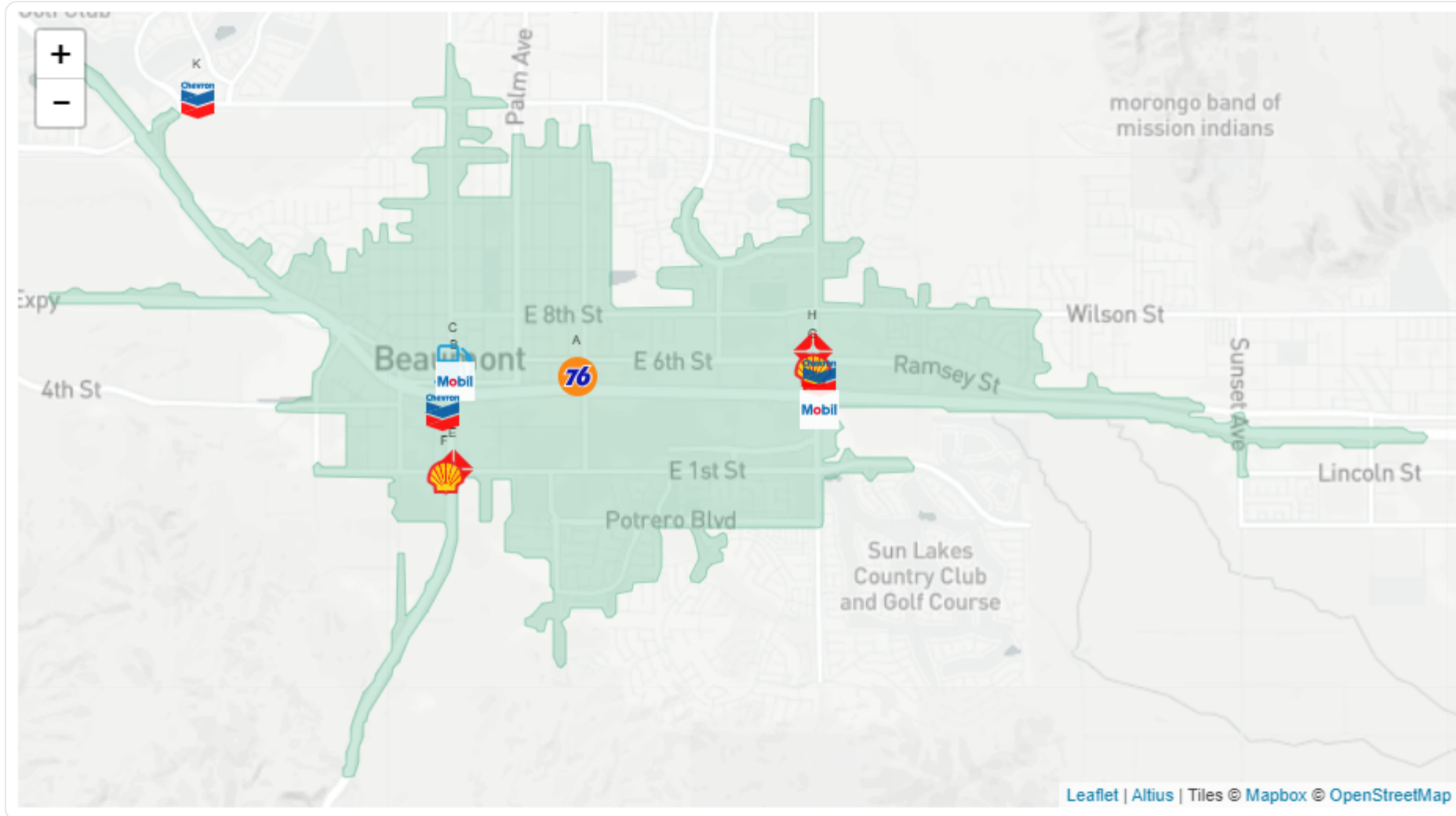
The Chevron (#51913) branded site at 325 Luis Estrada Rd, performs the best among all qsr sites in the area on qsr sales, with a total of \$16,000 per month.

The Arco (#91309) branded site at 450 E 1 St, performs the best among all car wash sites in the area on cars through the wash, with a total of 2,200 cars per month through the wash.

# Map of fuel stations in the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



ID	Site ID	Distance	Brand	Name
A	1			76
B	110002	0.59		Mobil
C	110001	0.60		USA Gasoline
D	51913	0.67		Chevron
E	91309	0.74		ARCO
F	91310	0.79		Shell
G	110005	1.12		Shell
H	110004	1.12		ARCO
I	110006	1.14		Chevron
J	110007	1.16		Mobil
K	91509	2.24		Chevron

### Comments:

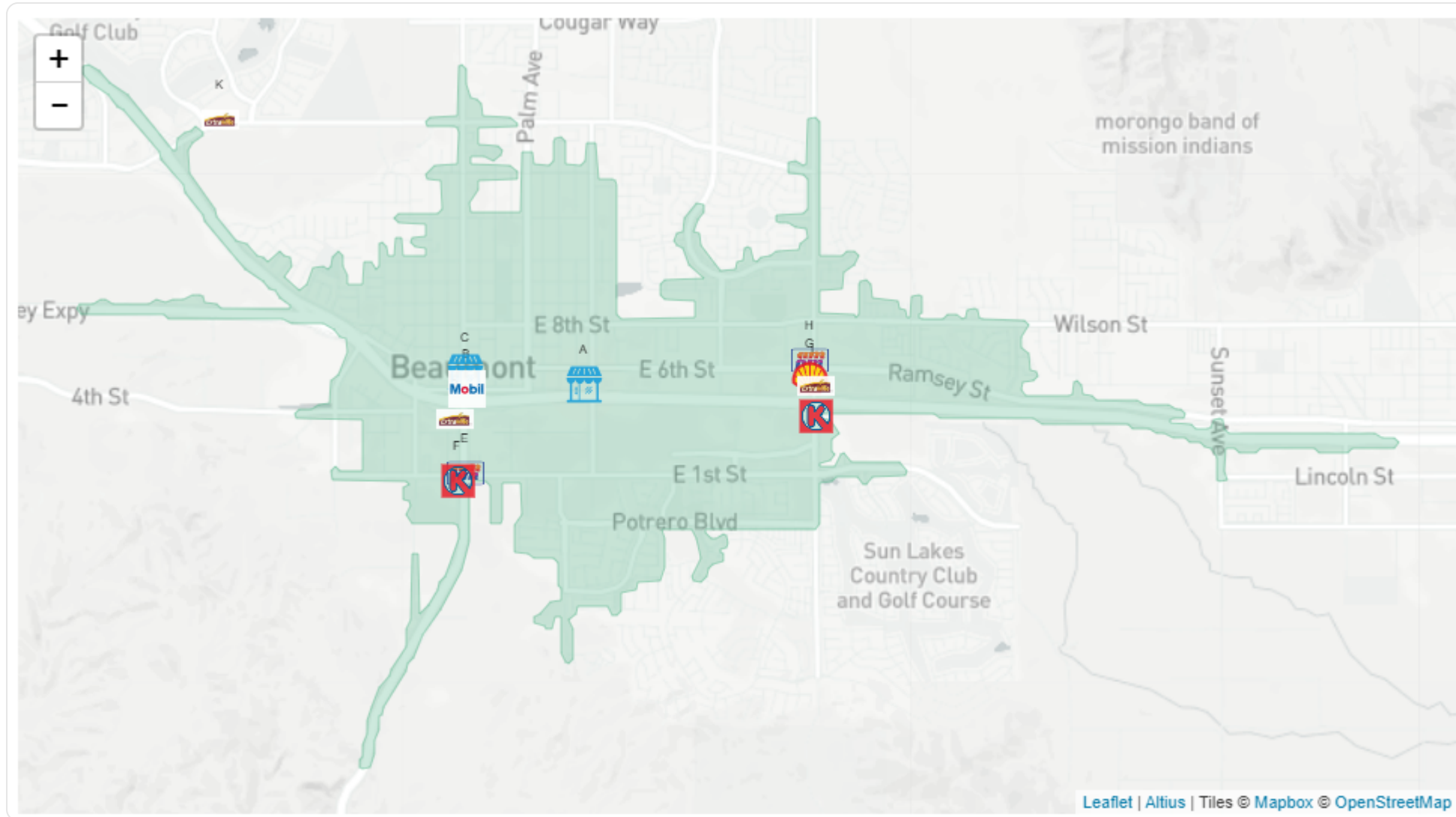
This map shows all fuel competition within a 5 minute drive-time polygon overlaid in green.

Shaded Area = 5min drive time from your site

# Map of convenience store sites in the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



ID	Site ID	Distance	Brand	Name
A	1			Independent
B	110002	0.59		Mobil
C	110001	0.60		USA Gasoline
D	51913	0.67		Extramile
E	91309	0.74		ampm
F	91310	0.79		Circle K
G	110005	1.12		Shell
H	110004	1.12		ampm
I	110006	1.14		Extramile
J	110007	1.16		Circle K
K	91509	2.24		Extramile

**Comments:**

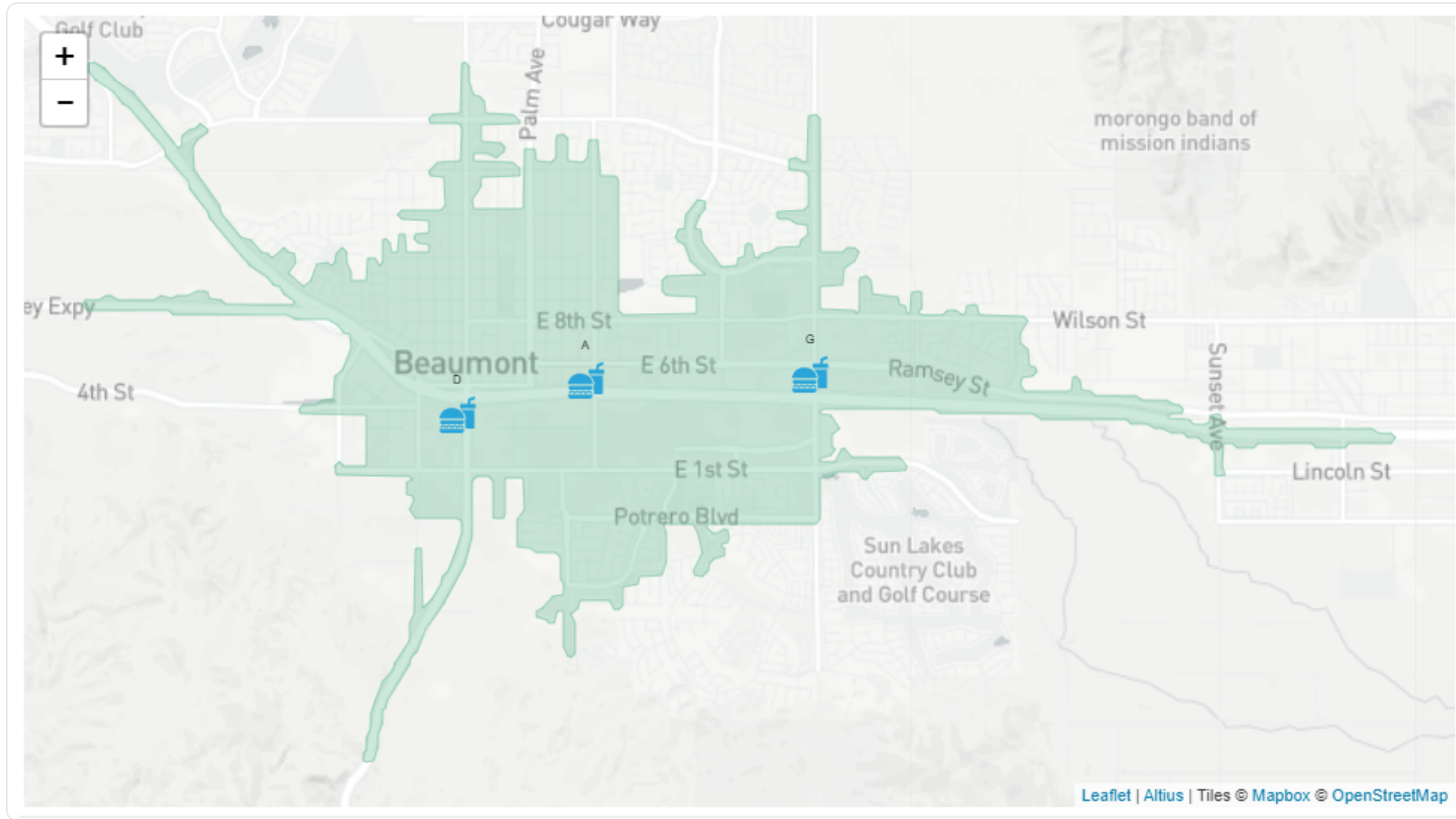
This map shows all local C-Store competition within a 5 minute drive-time polygon overlaid in green.

Shaded Area = 5min drive time from your site

# Map of qsr sites in the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



ID	Site ID	Distance	Brand	Name
A	1			Sbarro
D	51913	0.67		Krispy Krunchy
G	110005	1.12		Highland Shell

### Comments:

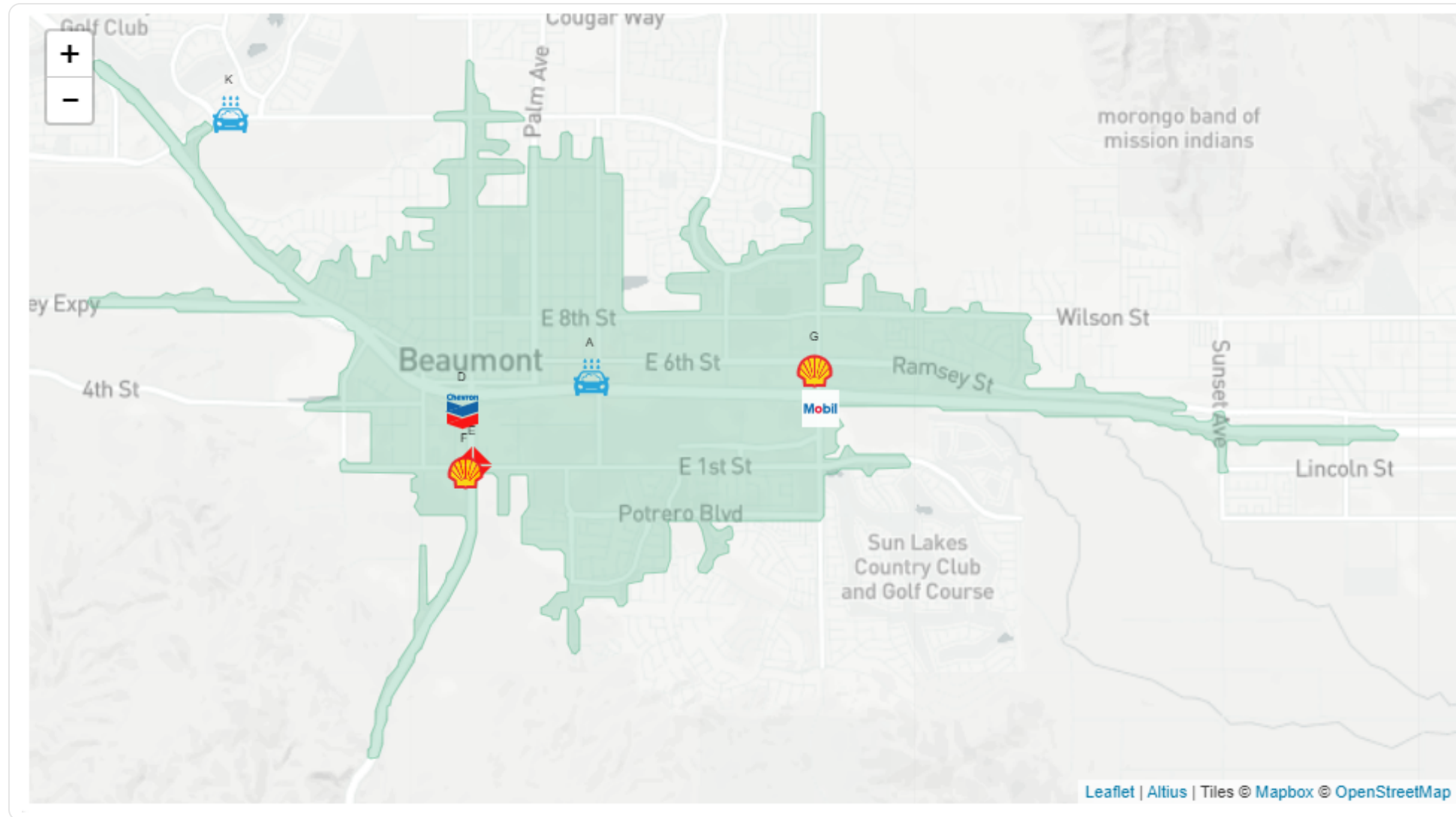
This map shows all local car wash competition within a 5 minute drive-time polygon overlaid in green.

Shaded Area = 5min drive time from your site

# Map of car wash sites in the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



ID	Site ID	Distance	Brand	Name
A	1			Independent
D	51913	0.67		Chevron
E	91309	0.74		ARCO
F	91310	0.79		Shell
G	110005	1.12		Shell
J	110007	1.16		Mobil
K	91509	2.24		Oak Valley

### Comments:



















This map shows all local car wash competition within a 5 minute drive-time polygon overlaid in green.


Shaded Area = 5min drive time from your site

## Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
110006		Chevron	116	121	-5	-4.10%
110001		USA Gasoline	167	174	-7	-4.00%
110004		ARCO	274	285	-11	-3.90%
91309		ARCO	273	284	-11	-3.90%
51913		Chevron	151	157	-6	-3.80%
91509		Chevron	127	132	-5	-3.80%
110002		Mobil	78	81	-3	-3.70%
110014		Shell	52	54	-2	-3.70%
91310		Shell	131	136	-5	-3.70%
1000131		76	161	167	-6	-3.60%
110010		Shell	53	55	-2	-3.60%
110005		Shell	57	59	-2	-3.40%
110007		Mobil	88	91	-3	-3.30%
110008		Chevron	112	115	-3	-2.60%
110009		ARCO	187	192	-5	-2.60%
110012		Chevron	111	114	-3	-2.60%
110011		ARCO	81	83	-2	-2.40%
21931		76	98	100	-2	-2.00%

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
52605		Mobil	51	52	-1	-1.90%
110016		ARCO	329	335	-6	-1.80%
110032		Fastrip	109	111	-2	-1.80%
32428		Shell	59	60	-1	-1.70%
310001		Chevron	129	131	-2	-1.50%
1000600		Morongo	252	255	-3	-1.20%
110031		Shell	88	89	-1	-1.10%
12015		Chevron	104	105	-1	-1.00%
1		76	98	0	98	0.00%











### Comments:

When analyzing the competitor impact of the new site opening, we can see that the majority of competitors gas volumes are impacted between 1-5%. In terms of gasoline gallons lost, the Arco (#110004) and the Arco (#91309) are both losing the greatest amount, each at 11,000 gallons per month in gasoline sales. In terms of volume percentage change, the Chevron (#110006) is expected to see the greatest decrease at -4.1%. The Arco brand is losing 33,000 gallons per month in gasoline sales spread across four locations.

Any sites that have been impacted by less than 1,000 gallons per month in fuel sales have been excluded from this page of the report.

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

## Base case: Impact on competitor volumes within the local area

Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	9	10	-1	-10.00%
1000131		76	13	14	-1	-7.10%
91310		Shell	13	14	-1	-7.10%
110002		Mobil	14	15	-1	-6.70%
91309		ARCO	15	16	-1	-6.30%
91509		Chevron	16	17	-1	-5.90%
51913		Chevron	17	18	-1	-5.60%
110008		Chevron	19	20	-1	-5.00%
110006		Chevron	21	22	-1	-4.50%
1		76	12	0	12	0.00%

### Comments:

When analyzing the competitor impact of the new site opening, we can see that the majority of competitors diesel volumes are impacted between 4-10%. In terms of diesel gallons lost, all competitive sites are losing 1,000 gallons per month, or less, in diesel sales. In terms of volume percentage change, the Shell (#110005) is expected to see the greatest decrease at -10%.

Any sites that have been impacted by less than 1,000 gallons per month in fuel sales have been excluded from this page of the report.



Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110001		USA Gasoline	46	49	-3	-6.10%
110002		Mobil	50	53	-3	-5.70%
110004		ampm	200	212	-12	-5.70%
51913		Extramile	134	142	-8	-5.60%
91309		ampm	189	200	-11	-5.50%
110005		Shell	88	93	-5	-5.40%
91310		Circle K	141	149	-8	-5.40%
1000131		Circle K	125	132	-7	-5.30%
110006		Extramile	54	57	-3	-5.30%
91509		Extramile	142	150	-8	-5.30%
110010		Shell	44	46	-2	-4.30%
110014		Shell	44	46	-2	-4.30%
110008		Extramile	47	49	-2	-4.10%
110007		Circle K	26	27	-1	-3.70%
110009		ampm	107	111	-4	-3.60%
110011		2 Go Express	54	56	-2	-3.60%
110012		Extramile	57	59	-2	-3.40%
52605		Snack Attack	86	89	-3	-3.40%

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110016		ampm	108	111	-3	-2.70%
110032		Fastrip	116	119	-3	-2.50%
21931		Circle K	120	123	-3	-2.40%
12015		Extramile	85	87	-2	-2.30%
32428		Shell	94	96	-2	-2.10%
110031		Fastfill Market	50	51	-1	-2.00%
310001		Extramile	114	116	-2	-1.70%
110076		7-Eleven	124	126	-2	-1.60%
1000600		Morongo	212	215	-3	-1.40%
1		Independent	108	0	108	0.00%



















**Comments:**

When analyzing the competitor impact on c-store sale volumes, we can see that the majority of competitor c-store volumes are impacted between 1-7%. In terms of sales lost, the Ampm (#110004) is projected to see the greatest decrease at \$12,000 per month. In terms of volume percentage change, the USA Gasoline (#110001) is expected to see the greatest decrease at -6.1%. The Ampm brand is losing \$30,000 per month in c-store sales spread across four locations.

Any sites that have been impacted by less than \$1,000 per month in c-store sales have been excluded from this page of the report.

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

Base case: Impact on competitor volumes within the local area

Site ID	Brand	Name	Change in Quick Service Restaurant Sales			
			Projected	Actual	Vol Change	% Change
110076		7-Eleven	16	18	-2	-11.10%
1000600		Morongo	28	31	-3	-9.70%
110026		Krispy Krunchy	19	21	-2	-9.50%
1000293		7-Eleven	22	24	-2	-8.30%
110005		Highland Shell	11	12	-1	-8.30%
52605		Church's	34	37	-3	-8.10%
51903		7-Eleven	24	26	-2	-7.70%
310003		Krispy Krunchy	13	14	-1	-7.10%
92610		Fatburger	27	29	-2	-6.90%
110075		7-Eleven	14	15	-1	-6.70%
1000222		7-Eleven	15	16	-1	-6.30%
110074		7-Eleven	15	16	-1	-6.30%
51913		Krispy Krunchy	15	16	-1	-6.30%
91507		Circle K	15	16	-1	-6.30%
21724		Shell	16	17	-1	-5.90%
91508		7-Eleven	16	17	-1	-5.90%
92804		7-Eleven	17	18	-1	-5.60%
1		Sbarro	27	0	27	0.00%

**Comments:**

When analyzing the competitor impact on qsr sale volumes, we can see that the majority of competitor qsr volumes are impacted between 5-12%. In terms of sales lost, the Morongo (#1000600) and the Church's (#52605) are both projected to see the greatest decrease, each at \$3,000 per month. In terms of volume percentage change, the 7-Eleven (#110076) is expected to see the greatest decrease at -11.1%.















Any sites that have been impacted by less than \$1,000 per month in qsr sales have been excluded from this page of the report.


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
110007		Mobil	841	925	-84	-9.10%
110005		Shell	1,319	1,450	-131	-9.00%
51913		Chevron	1,433	1,575	-142	-9.00%
91309		ARCO	2,001	2,200	-199	-9.00%
91310		Shell	1,569	1,725	-156	-9.00%
91509		Oak Valley	1,933	2,125	-192	-9.00%
110011		ARCO	1,011	1,100	-89	-8.10%
110016		ARCO	1,656	1,800	-144	-8.00%
21931		Circle K	1,105	1,200	-95	-7.90%
32428		Shell	1,521	1,650	-129	-7.80%
1000600		Morongo	1,173	1,250	-77	-6.20%
310002		Morongo	2,126	2,250	-124	-5.50%
21724		Shell	1,681	1,750	-69	-3.90%
210038		Chevron	1,493	1,550	-57	-3.70%
91507		Circle K	1,763	1,825	-62	-3.40%
110026		Shell	1,405	1,450	-45	-3.10%

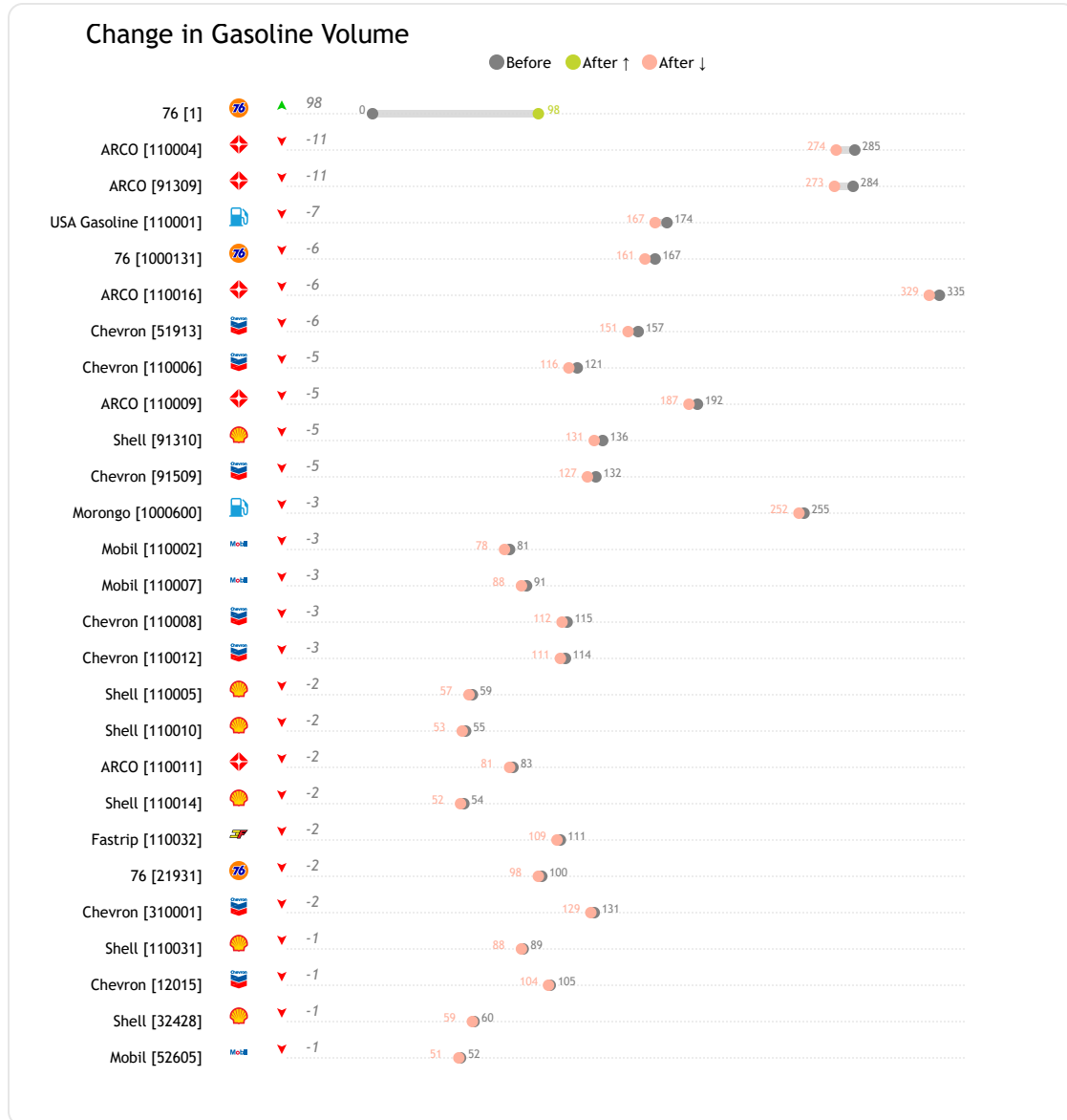
Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
91313		Chevron	2,330	2,400	-70	-2.90%
51917		Yucaipa Car Wash	2,382	2,450	-68	-2.80%
92610		ARCO	2,338	2,400	-62	-2.60%
1000292		Chevron	1,170	1,200	-30	-2.50%
51907		Chevron	2,006	2,050	-44	-2.10%
210030		Shell	882	900	-18	-2.00%
210029		Mobil	1,597	1,628	-31	-1.90%
1		Independent	2,117	0	2,117	0.00%

**Comments:**

When analyzing the competitor impact on car wash sale volumes, we can see that the majority of competitor car wash volumes are impacted between 1-10%. In terms of sales lost, the Arco (#91309) is projected to see the greatest decrease at 199 washes per month. In terms of volume percentage change, the Mobil (#110007) is expected to see the greatest decrease at -9.1%.

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Base case: Impact on competitor volumes within the local area



\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Base case: Impact on competitor volumes within the local area

## JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

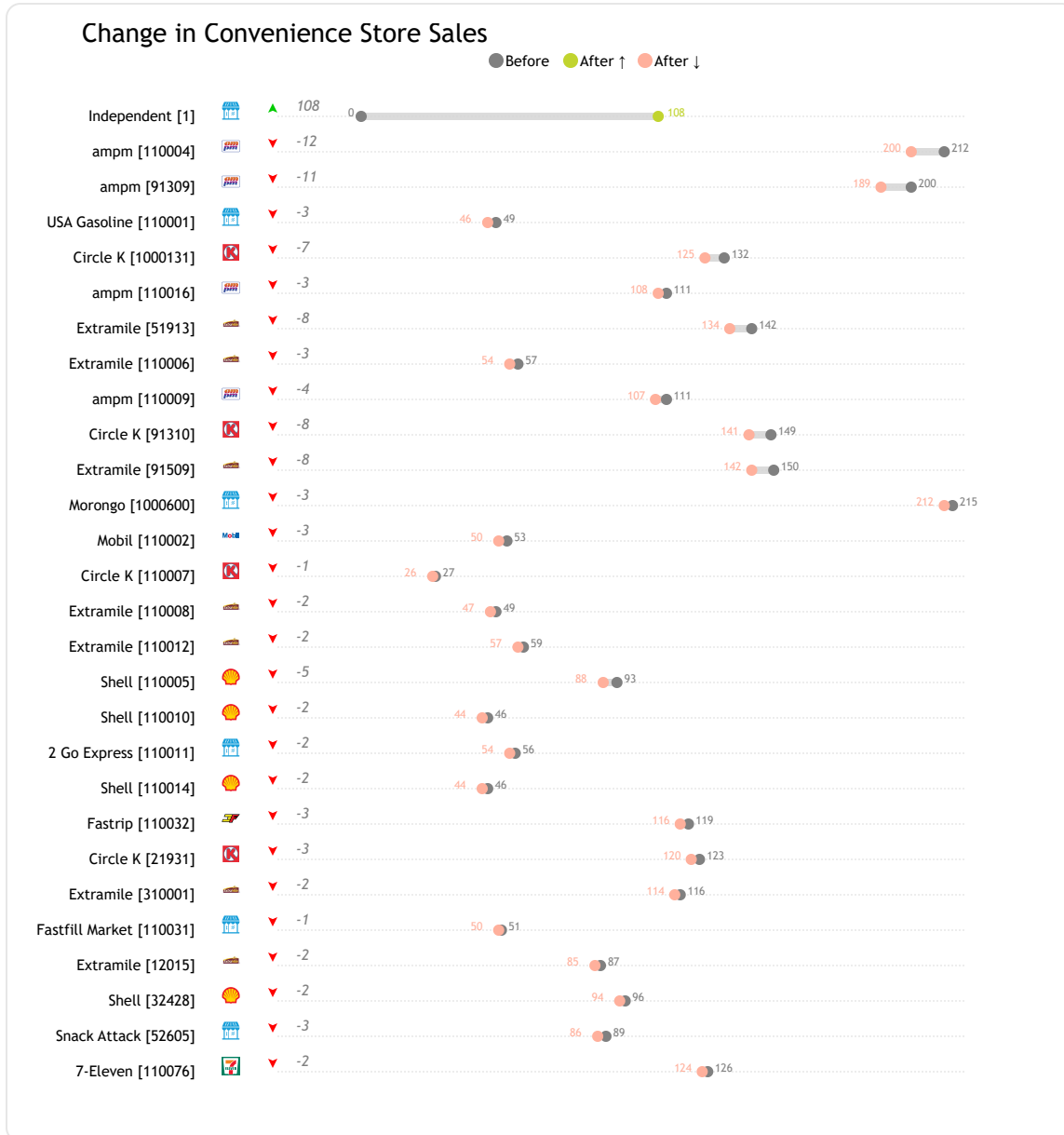


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

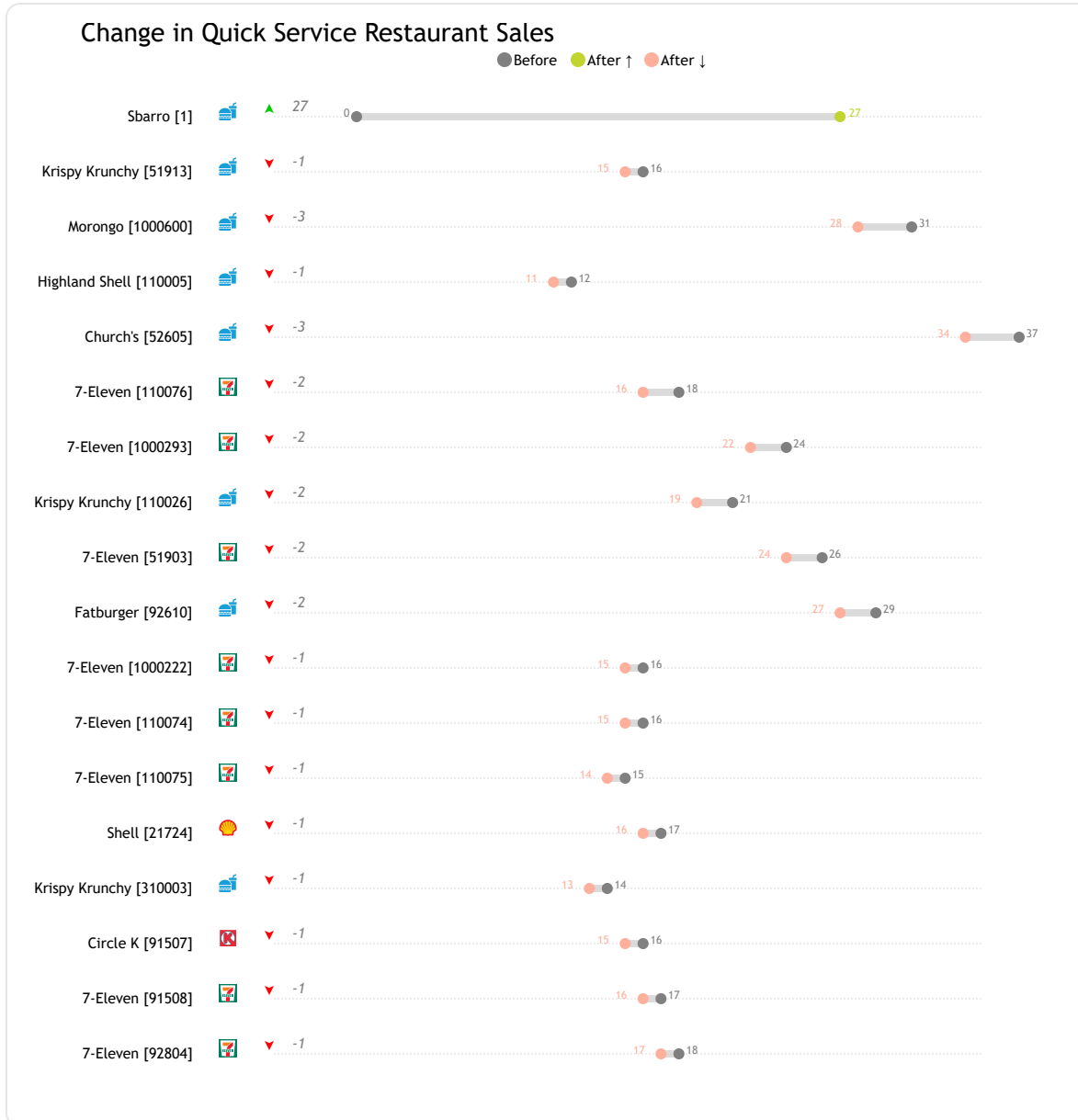


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

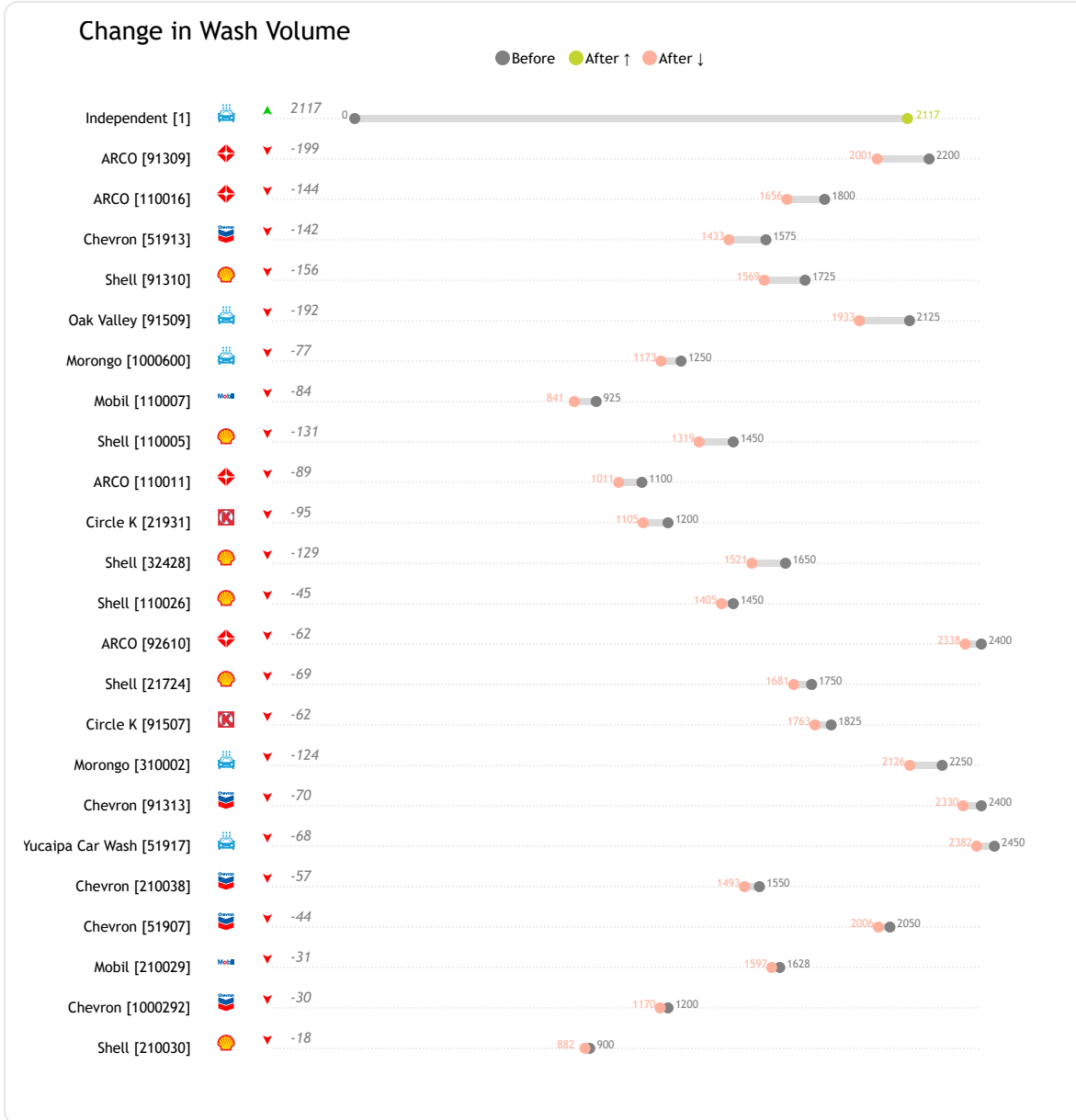


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Base case: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA























\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$










## Case 2: Impact on competitor volumes within the local area











# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
110007		Mobil	87	91	-4	-4.40%
91310		Shell	130	136	-6	-4.40%
1000131		76	160	167	-7	-4.20%
110004		ARCO	273	285	-12	-4.20%
91309		ARCO	272	284	-12	-4.20%
110006		Chevron	116	121	-5	-4.10%
110001		USA Gasoline	167	174	-7	-4.00%
51913		Chevron	151	157	-6	-3.80%
91509		Chevron	127	132	-5	-3.80%
110002		Mobil	78	81	-3	-3.70%
110014		Shell	52	54	-2	-3.70%
110010		Shell	53	55	-2	-3.60%
110005		Shell	57	59	-2	-3.40%
110009		ARCO	186	192	-6	-3.10%
110008		Chevron	112	115	-3	-2.60%
110012		Chevron	111	114	-3	-2.60%
110011		ARCO	81	83	-2	-2.40%
110031		Shell	87	89	-2	-2.20%
110016		ARCO	328	335	-7	-2.10%
21931		76	98	100	-2	-2.00%

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
12015		Chevron	103	105	-2	-1.90%
52605		Mobil	51	52	-1	-1.90%
110032		Fastrip	109	111	-2	-1.80%
32428		Shell	59	60	-1	-1.70%
310001		Chevron	129	131	-2	-1.50%
1000600		Morongo	252	255	-3	-1.20%
1		Independent	106	0	106	0.00%

Case 2: Impact on competitor volumes within the local area











Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	9	10	-1	-10.00%
1000131		76	13	14	-1	-7.10%
91310		Shell	13	14	-1	-7.10%
110002		Mobil	14	15	-1	-6.70%
91309		ARCO	15	16	-1	-6.30%
91509		Chevron	16	17	-1	-5.90%
51913		Chevron	17	18	-1	-5.60%
110008		Chevron	19	20	-1	-5.00%
110006		Chevron	21	22	-1	-4.50%
1		Independent	12	0	12	0.00%

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & OSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

## Case 2: Impact on competitor volumes within the local area



















# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110002		Mobil	50	53	-3	-5.70%
110005		Shell	88	93	-5	-5.40%
1000131		Circle K	125	132	-7	-5.30%
110006		Extramile	54	57	-3	-5.30%
110004		ampm	201	212	-11	-5.20%
91309		ampm	190	200	-10	-5.00%
51913		Extramile	135	142	-7	-4.90%
91310		Circle K	142	149	-7	-4.70%
91509		Extramile	143	150	-7	-4.70%
110010		Shell	44	46	-2	-4.30%
110014		Shell	44	46	-2	-4.30%
110001		USA Gasoline	47	49	-2	-4.10%
110008		Extramile	47	49	-2	-4.10%
110007		Circle K	26	27	-1	-3.70%
110009		ampm	107	111	-4	-3.60%
110012		Extramile	57	59	-2	-3.40%
52605		Snack Attack	86	89	-3	-3.40%

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110016		ampm	108	111	-3	-2.70%
21931		Circle K	120	123	-3	-2.40%
12015		Extramile	85	87	-2	-2.30%
32428		Shell	94	96	-2	-2.10%
110031		Fastfill Market	50	51	-1	-2.00%
110011		2 Go Express	55	56	-1	-1.80%
110032		Fastrip	117	119	-2	-1.70%
310001		Extramile	114	116	-2	-1.70%
110076		7-Eleven	124	126	-2	-1.60%
1000600		Morongo	212	215	-3	-1.40%
1		Independent	98	0	98	0.00%




















Case 2: Impact on competitor volumes within the local area






Site ID	Brand	Name	Change in Quick Service Restaurant Sales			
			Projected	Actual	Vol Change	% Change
110076		7-Eleven	16	18	-2	-11.10%
1000600		Morongo	28	31	-3	-9.70%
1000293		7-Eleven	22	24	-2	-8.30%
110005		Highland Shell	11	12	-1	-8.30%
52605		Church's	34	37	-3	-8.10%
51903		7-Eleven	24	26	-2	-7.70%
310003		Krispy Krunchy	13	14	-1	-7.10%
92610		Fatburger	27	29	-2	-6.90%
110075		7-Eleven	14	15	-1	-6.70%
1000222		7-Eleven	15	16	-1	-6.30%
110074		7-Eleven	15	16	-1	-6.30%
51913		Krispy Krunchy	15	16	-1	-6.30%
91507		Circle K	15	16	-1	-6.30%
21724		Shell	16	17	-1	-5.90%
91508		7-Eleven	16	17	-1	-5.90%
92804		7-Eleven	17	18	-1	-5.60%
110026		Krispy Krunchy	20	21	-1	-4.80%
1		Sbarro	25	0	25	0.00%

## Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

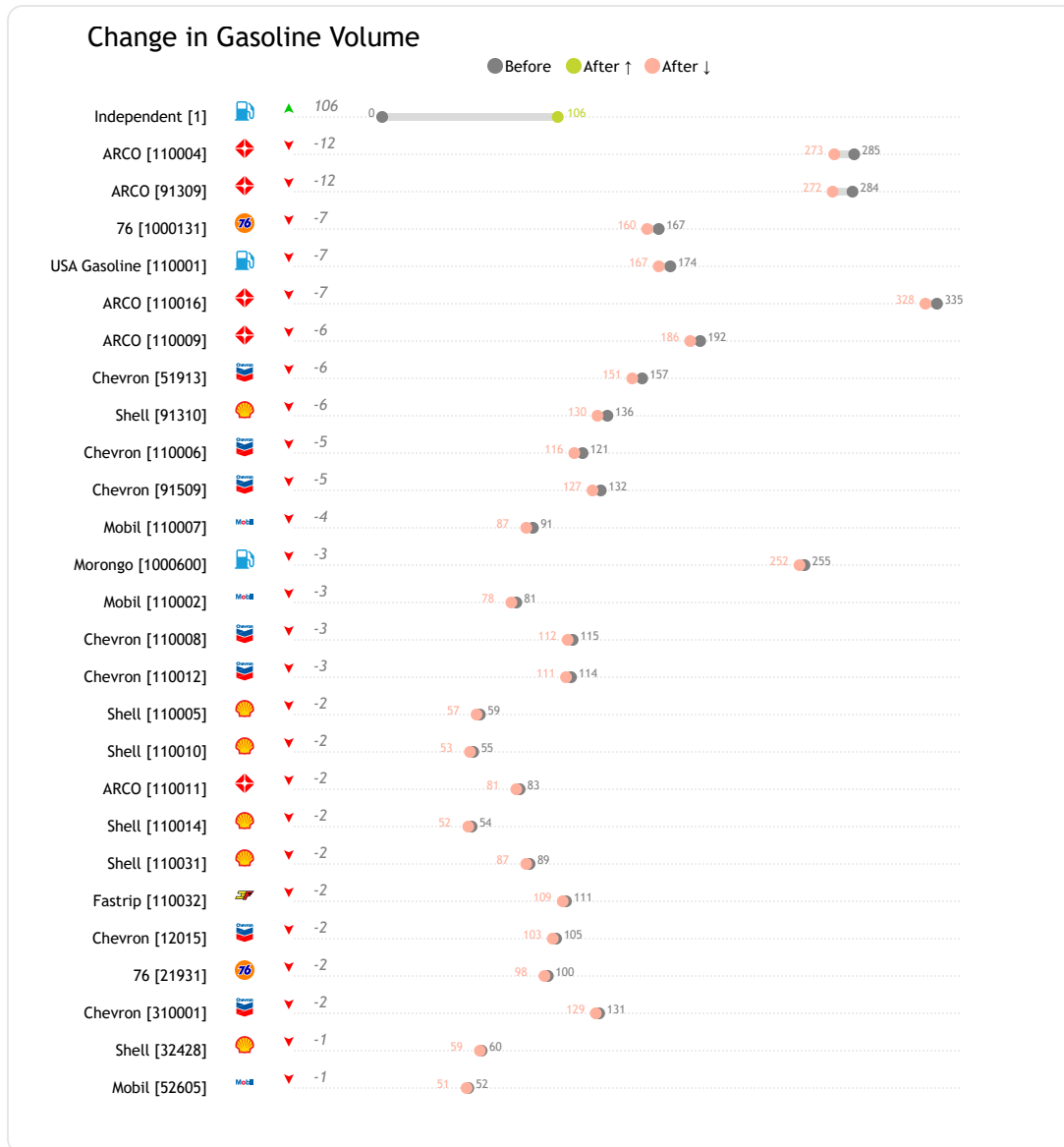
Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	1,321	1,450	-129	-8.90%
110007		Mobil	843	925	-82	-8.90%
51913		Chevron	1,435	1,575	-140	-8.90%
91309		ARCO	2,004	2,200	-196	-8.90%
91310		Shell	1,571	1,725	-154	-8.90%
91509		Oak Valley	1,936	2,125	-189	-8.90%
110011		ARCO	1,012	1,100	-88	-8.00%
110016		ARCO	1,658	1,800	-142	-7.90%
21931		Circle K	1,107	1,200	-93	-7.80%
32428		Shell	1,523	1,650	-127	-7.70%
1000600		Morongo	1,174	1,250	-76	-6.10%
310002		Morongo	2,128	2,250	-122	-5.40%
21724		Shell	1,682	1,750	-68	-3.90%
210038		Chevron	1,494	1,550	-56	-3.60%
91507		Circle K	1,764	1,825	-61	-3.30%
110026		Shell	1,406	1,450	-44	-3.00%
91313		Chevron	2,331	2,400	-69	-2.90%
51917		Yucaipa Car Wash	2,383	2,450	-67	-2.70%
92610		ARCO	2,339	2,400	-61	-2.50%

Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
1000292		Chevron	1,171	1,200	-29	-2.40%
51907		Chevron	2,006	2,050	-44	-2.10%
210030		Shell	882	900	-18	-2.00%
210029		Mobil	1,598	1,628	-30	-1.80%
1		Independent	2,084	0	2,084	0.00%

# Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

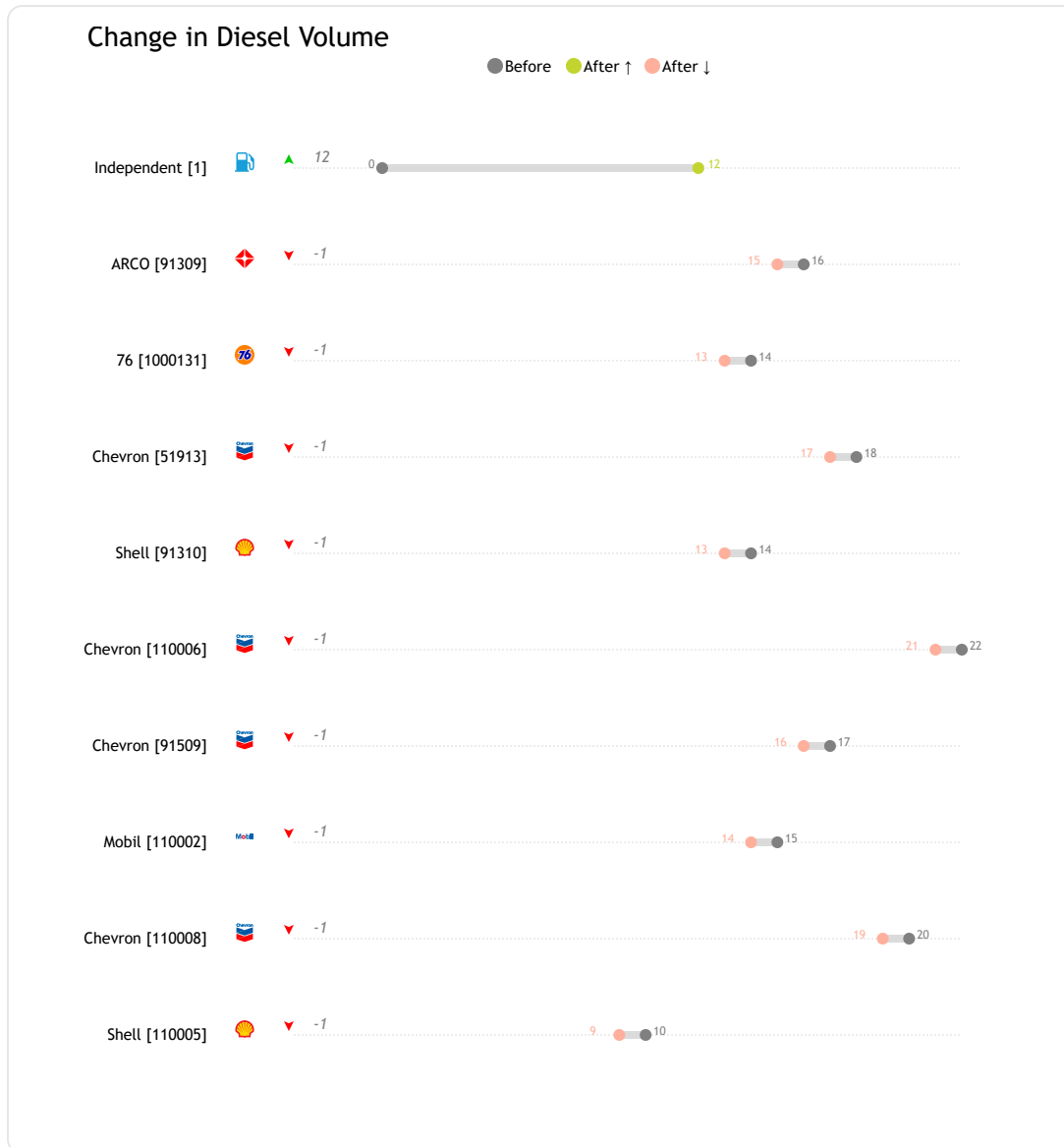


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

## Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

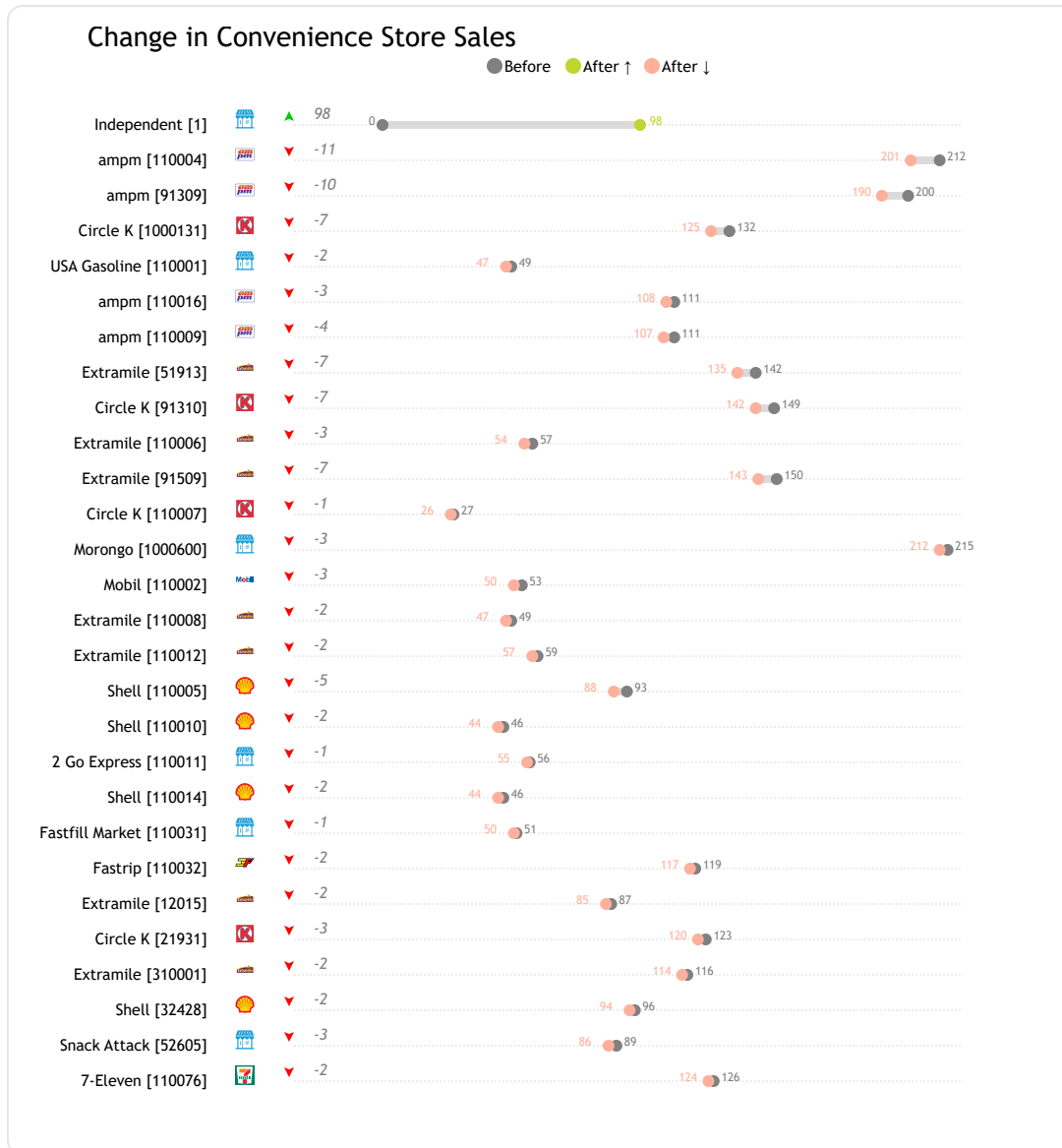


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$



## Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

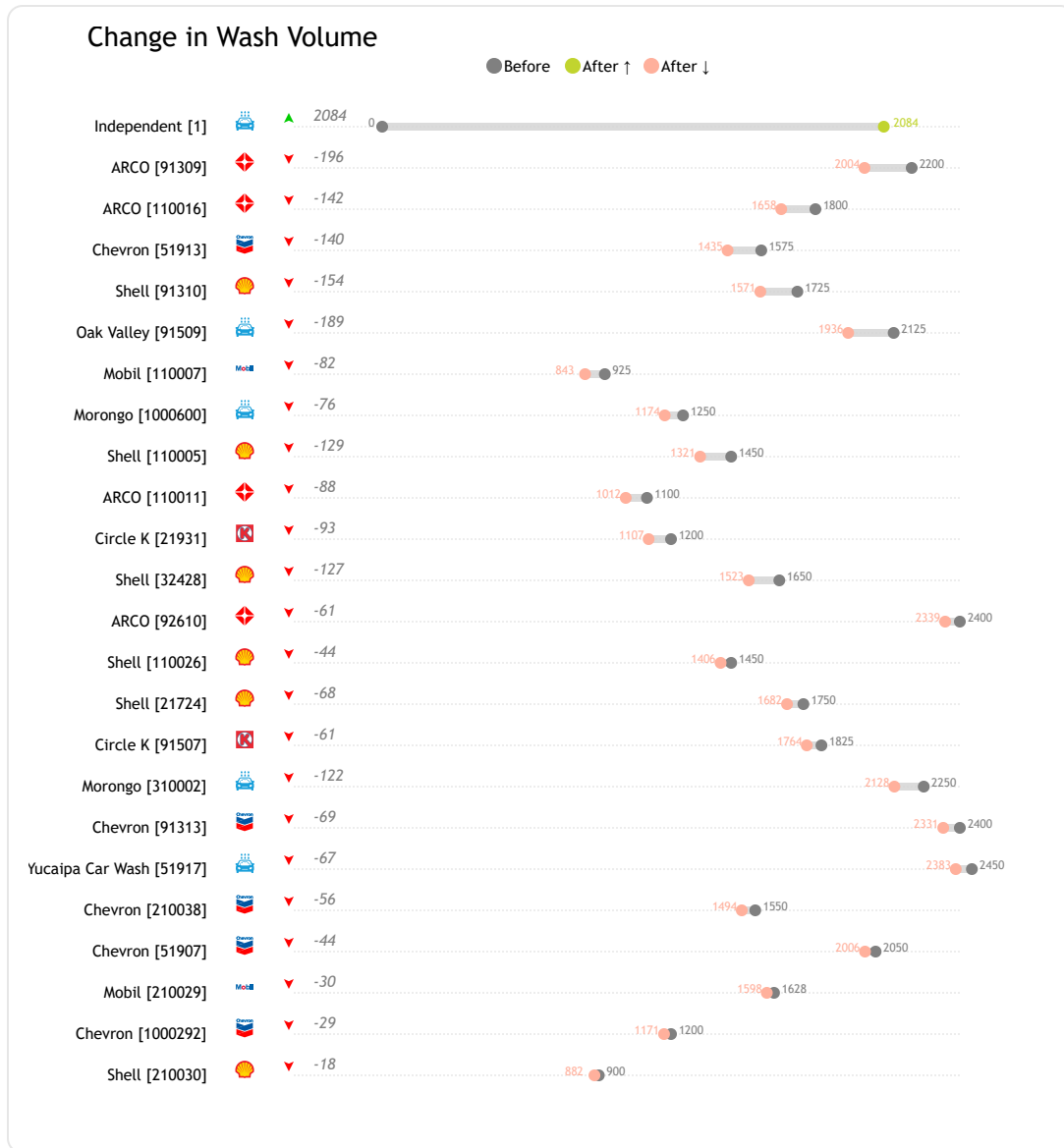


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 2: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA


























\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

### Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC











East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
110007		Mobil	87	91	-4	-4.40%
110006		Chevron	116	121	-5	-4.10%
110001		USA Gasoline	167	174	-7	-4.00%
110004		ARCO	274	285	-11	-3.90%
91309		ARCO	273	284	-11	-3.90%
51913		Chevron	151	157	-6	-3.80%
91509		Chevron	127	132	-5	-3.80%
110002		Mobil	78	81	-3	-3.70%
110014		Shell	52	54	-2	-3.70%
91310		Shell	131	136	-5	-3.70%
1000131		76	161	167	-6	-3.60%
110010		Shell	53	55	-2	-3.60%
110005		Shell	57	59	-2	-3.40%
110008		Chevron	112	115	-3	-2.60%
110009		ARCO	187	192	-5	-2.60%
110012		Chevron	111	114	-3	-2.60%
110011		ARCO	81	83	-2	-2.40%
21931		76	98	100	-2	-2.00%

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
52605		Mobil	51	52	-1	-1.90%
110016		ARCO	329	335	-6	-1.80%
110032		Fastrip	109	111	-2	-1.80%
32428		Shell	59	60	-1	-1.70%
310001		Chevron	129	131	-2	-1.50%
1000600		Morongo	252	255	-3	-1.20%
110031		Shell	88	89	-1	-1.10%
12015		Chevron	104	105	-1	-1.00%
1		76	101	0	101	0.00%

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

### Case 3: Impact on competitor volumes within the local area
















Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	9	10	-1	-10.00%
1000131		76	13	14	-1	-7.10%
91310		Shell	13	14	-1	-7.10%
110002		Mobil	14	15	-1	-6.70%
91309		ARCO	15	16	-1	-6.30%
91509		Chevron	16	17	-1	-5.90%
51913		Chevron	17	18	-1	-5.60%
110008		Chevron	19	20	-1	-5.00%
110006		Chevron	21	22	-1	-4.50%
1		76	12	0	12	0.00%











\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

### Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC



















East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110001		USA Gasoline	45	49	-4	-8.20%
51913		Extramile	131	142	-11	-7.70%
1000131		Circle K	122	132	-10	-7.60%
110002		Mobil	49	53	-4	-7.50%
110004		ampm	196	212	-16	-7.50%
110005		Shell	86	93	-7	-7.50%
91309		ampm	185	200	-15	-7.50%
110007		Circle K	25	27	-2	-7.40%
91310		Circle K	138	149	-11	-7.40%
91509		Extramile	139	150	-11	-7.30%
110006		Extramile	53	57	-4	-7.00%
110010		Shell	43	46	-3	-6.50%
110014		Shell	43	46	-3	-6.50%
110009		ampm	105	111	-6	-5.40%
110012		Extramile	56	59	-3	-5.10%
52605		Snack Attack	85	89	-4	-4.50%
110008		Extramile	47	49	-2	-4.10%

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110031		Fastfill Market	49	51	-2	-3.90%
110011		2 Go Express	54	56	-2	-3.60%
110016		ampm	107	111	-4	-3.60%
110032		Fastrip	115	119	-4	-3.40%
21931		Circle K	119	123	-4	-3.30%
32428		Shell	93	96	-3	-3.10%
310001		Extramile	113	116	-3	-2.60%
110076		7-Eleven	123	126	-3	-2.40%
1000600		Morongo	210	215	-5	-2.30%
12015		Extramile	85	87	-2	-2.30%
1		7-Eleven	149	0	149	0.00%

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

### Case 3: Impact on competitor volumes within the local area






















Site ID	Brand	Name	Change in Quick Service Restaurant Sales			
			Projected	Actual	Vol Change	% Change
110076		7-Eleven	16	18	-2	-11.10%
1000600		Morongo	28	31	-3	-9.70%
110026		Krispy Krunchy	19	21	-2	-9.50%
1000293		7-Eleven	22	24	-2	-8.30%
110005		Highland Shell	11	12	-1	-8.30%
52605		Church's	34	37	-3	-8.10%
51903		7-Eleven	24	26	-2	-7.70%
310003		Krispy Krunchy	13	14	-1	-7.10%
92610		Fatburger	27	29	-2	-6.90%
110075		7-Eleven	14	15	-1	-6.70%
1000222		7-Eleven	15	16	-1	-6.30%
110074		7-Eleven	15	16	-1	-6.30%
51913		Krispy Krunchy	15	16	-1	-6.30%
91507		Circle K	15	16	-1	-6.30%
21724		Shell	16	17	-1	-5.90%
91508		7-Eleven	16	17	-1	-5.90%
92804		7-Eleven	17	18	-1	-5.60%
1		Sbarro	28	0	28	0.00%




\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

### Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
110007		Mobil	843	925	-82	-8.90%
110005		Shell	1,322	1,450	-128	-8.80%
51913		Chevron	1,436	1,575	-139	-8.80%
91309		ARCO	2,006	2,200	-194	-8.80%
91310		Shell	1,573	1,725	-152	-8.80%
91509		Oak Valley	1,938	2,125	-187	-8.80%
110011		ARCO	1,013	1,100	-87	-7.90%
110016		ARCO	1,660	1,800	-140	-7.80%
21931		Circle K	1,108	1,200	-92	-7.70%
32428		Shell	1,524	1,650	-126	-7.60%
1000600		Morongo	1,174	1,250	-76	-6.10%
310002		Morongo	2,129	2,250	-121	-5.40%
21724		Shell	1,683	1,750	-67	-3.80%
210038		Chevron	1,495	1,550	-55	-3.50%
91507		Circle K	1,764	1,825	-61	-3.30%
110026		Shell	1,406	1,450	-44	-3.00%
91313		Chevron	2,331	2,400	-69	-2.90%
51917		Yucaipa Car Wash	2,384	2,450	-66	-2.70%
92610		ARCO	2,340	2,400	-60	-2.50%
1000292		Chevron	1,171	1,200	-29	-2.40%
51907		Chevron	2,007	2,050	-43	-2.10%

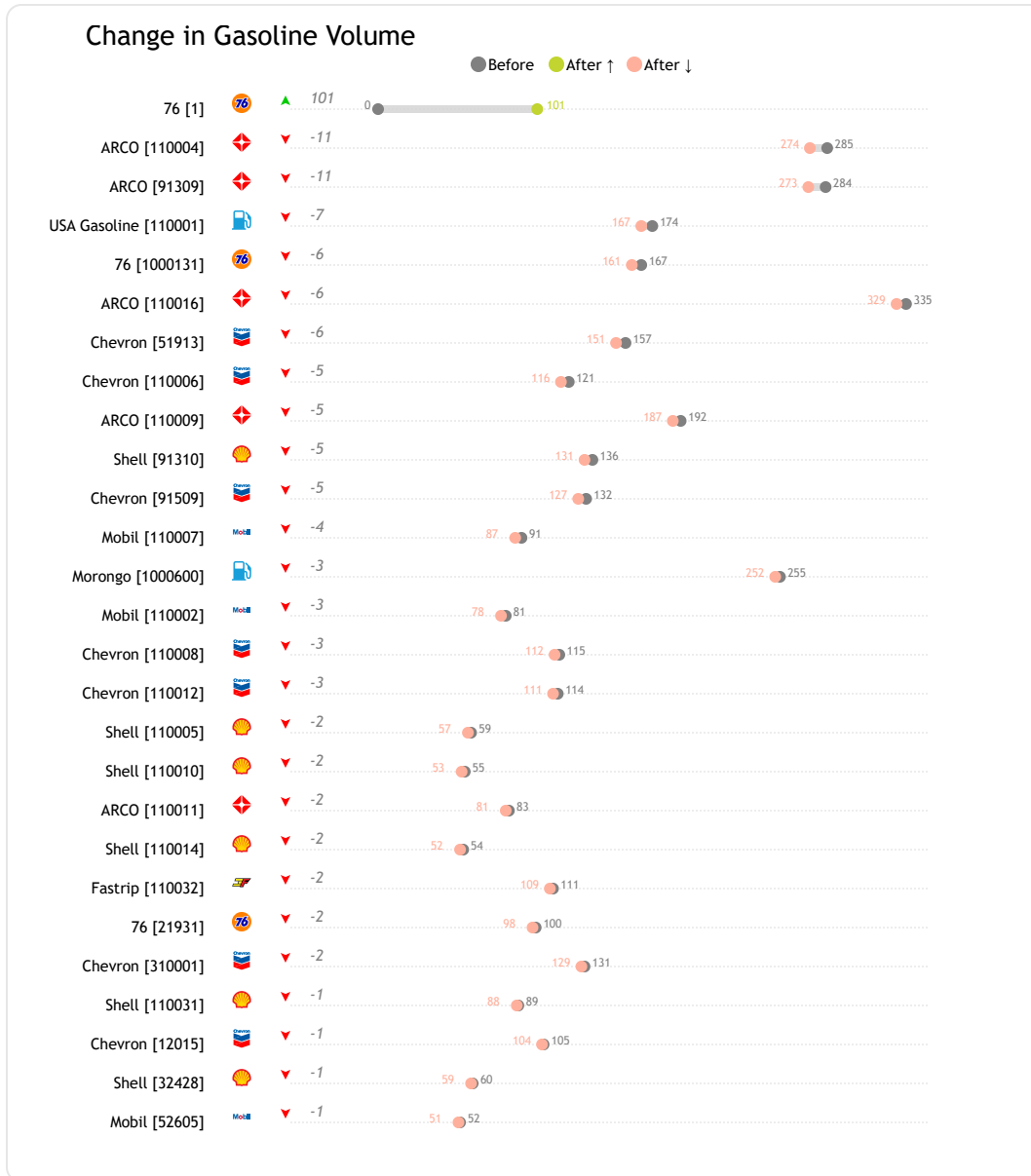
Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
210030		Shell	883	900	-17	-1.90%
210029		Mobil	1,598	1,628	-30	-1.80%
1		Independent	2,064	0	2,064	0.00%

\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$



# Case 3: Impact on competitor volumes within the local area

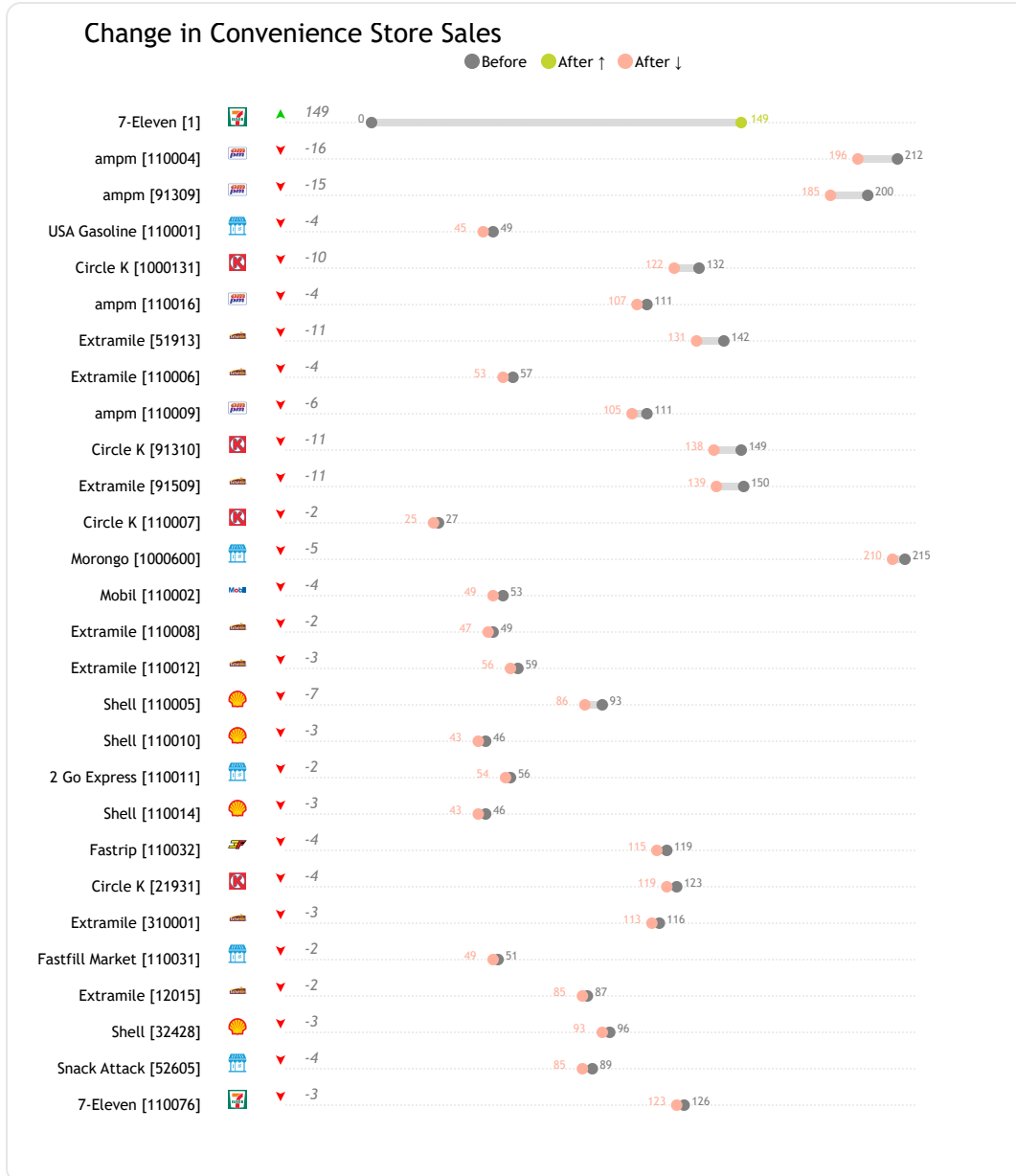


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

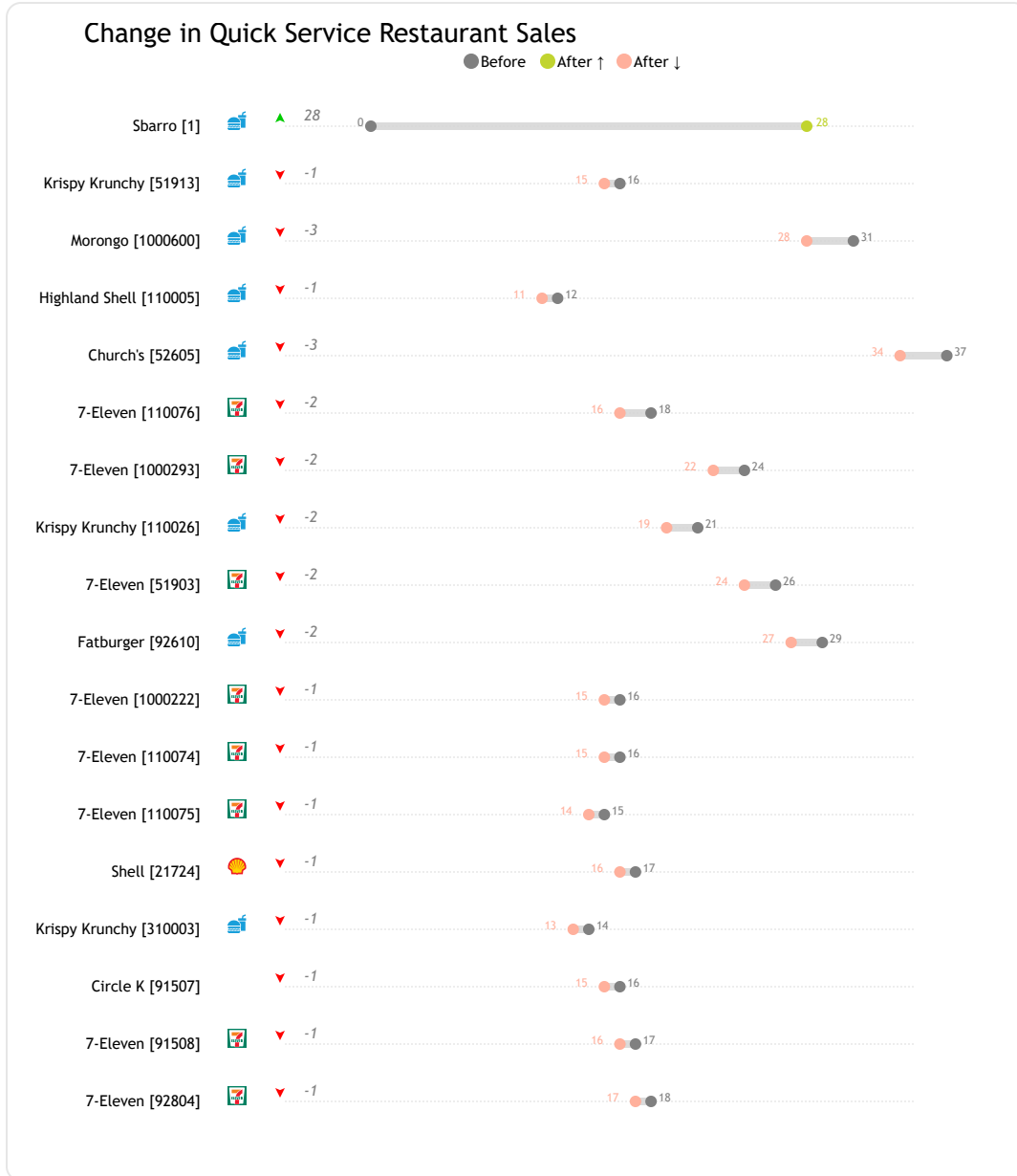


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

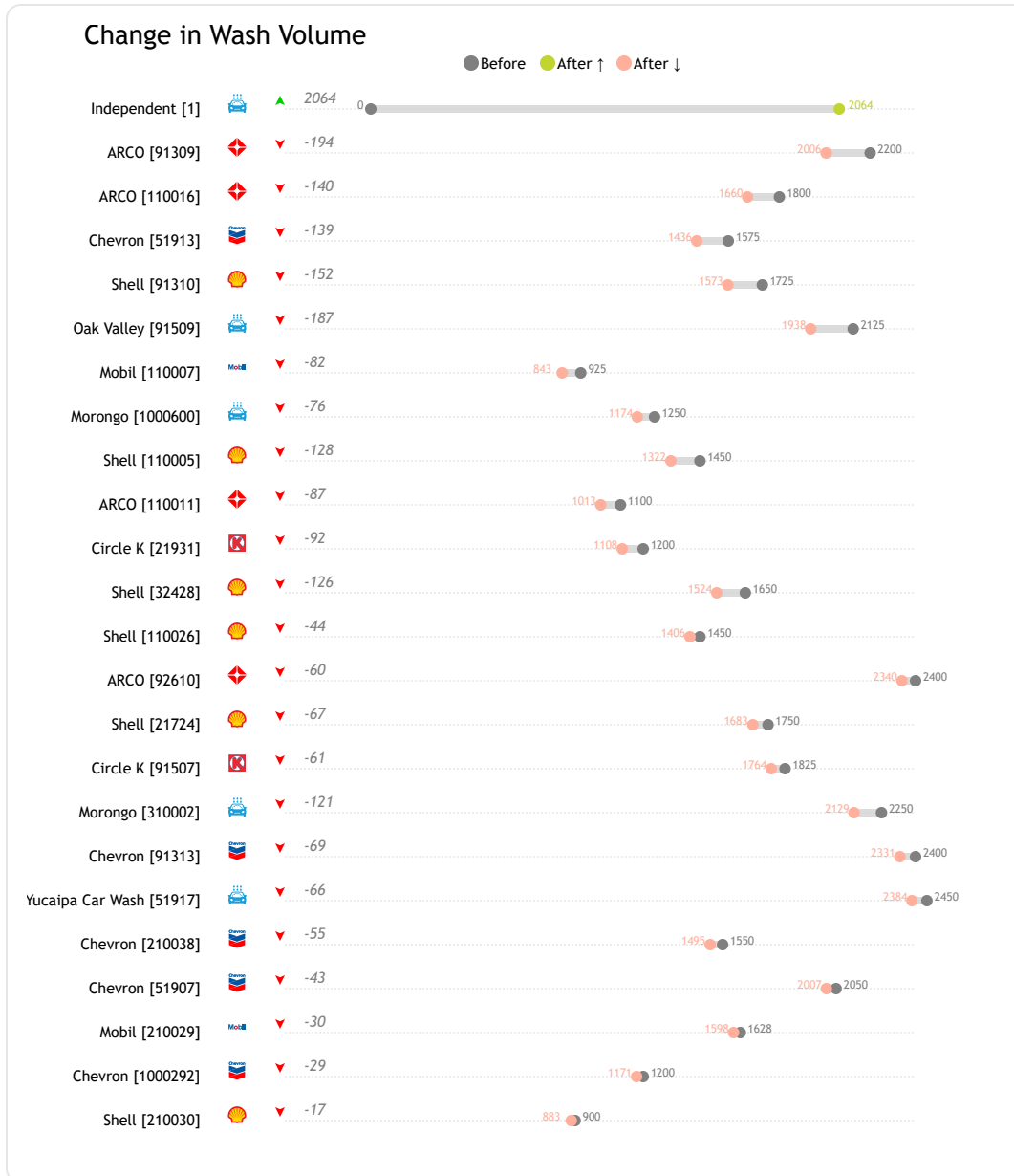


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 3: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA














\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

## Case 4: Impact on competitor volumes within the local area











# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
110006		Chevron	116	121	-5	-4.10%
110001		USA Gasoline	167	174	-7	-4.00%
110004		ARCO	274	285	-11	-3.90%
91309		ARCO	273	284	-11	-3.90%
51913		Chevron	151	157	-6	-3.80%
91509		Chevron	127	132	-5	-3.80%
110002		Mobil	78	81	-3	-3.70%
110014		Shell	52	54	-2	-3.70%
91310		Shell	131	136	-5	-3.70%
1000131		76	161	167	-6	-3.60%
110010		Shell	53	55	-2	-3.60%
110005		Shell	57	59	-2	-3.40%
110007		Mobil	88	91	-3	-3.30%
110008		Chevron	112	115	-3	-2.60%
110009		ARCO	187	192	-5	-2.60%
110012		Chevron	111	114	-3	-2.60%
110011		ARCO	81	83	-2	-2.40%
21931		76	98	100	-2	-2.00%

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
52605		Mobil	51	52	-1	-1.90%
110016		ARCO	329	335	-6	-1.80%
110032		Fastrip	109	111	-2	-1.80%
32428		Shell	59	60	-1	-1.70%
310001		Chevron	129	131	-2	-1.50%
1000600		Morongo	252	255	-3	-1.20%
110031		Shell	88	89	-1	-1.10%
12015		Chevron	104	105	-1	-1.00%
1		76	98	98	0	0.00%




















## Case 4: Impact on competitor volumes within the local area





Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	9	10	-1	-10.00%
1000131		76	13	14	-1	-7.10%
91310		Shell	13	14	-1	-7.10%
110002		Mobil	14	15	-1	-6.70%
91309		ARCO	15	16	-1	-6.30%
91509		Chevron	16	17	-1	-5.90%
51913		Chevron	17	18	-1	-5.60%
110008		Chevron	19	20	-1	-5.00%
110006		Chevron	21	22	-1	-4.50%
1		76	12	0	12	0.00%

## Case 4: Impact on competitor volumes within the local area



















# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
110001		USA Gasoline	46	49	-3	-6.10%
110002		Mobil	50	53	-3	-5.70%
110004		ampm	200	212	-12	-5.70%
51913		Extramile	134	142	-8	-5.60%
91309		ampm	189	200	-11	-5.50%
110005		Shell	88	93	-5	-5.40%
91310		Circle K	141	149	-8	-5.40%
1000131		Circle K	125	132	-7	-5.30%
110006		Extramile	54	57	-3	-5.30%
91509		Extramile	142	150	-8	-5.30%
110010		Shell	44	46	-2	-4.30%
110014		Shell	44	46	-2	-4.30%
110008		Extramile	47	49	-2	-4.10%
110007		Circle K	26	27	-1	-3.70%
110009		ampm	107	111	-4	-3.60%
110011		2 Go Express	54	56	-2	-3.60%
110012		Extramile	57	59	-2	-3.40%
52605		Snack Attack	86	89	-3	-3.40%
110016		ampm	108	111	-3	-2.70%
110032		Fastrip	116	119	-3	-2.50%

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
21931		Circle K	120	123	-3	-2.40%
12015		Extramile	85	87	-2	-2.30%
32428		Shell	94	96	-2	-2.10%
110031		Fastfill Market	50	51	-1	-2.00%
310001		Extramile	114	116	-2	-1.70%
110076		7-Eleven	124	126	-2	-1.60%
1000600		Morongo	212	215	-3	-1.40%
1		Independent	108	0	108	0.00%

## Case 4: Impact on competitor volumes within the local area


















Site ID	Brand	Name	Change in Quick Service Restaurant Sales			
			Projected	Actual	Vol Change	% Change
110076		7-Eleven	16	18	-2	-11.10%
1000600		Morongong	28	31	-3	-9.70%
110026		Krispy Krunchy	19	21	-2	-9.50%
1000293		7-Eleven	22	24	-2	-8.30%
110005		Highland Shell	11	12	-1	-8.30%
52605		Church's	34	37	-3	-8.10%
51903		7-Eleven	24	26	-2	-7.70%
310003		Krispy Krunchy	13	14	-1	-7.10%
92610		Fatburger	27	29	-2	-6.90%
110075		7-Eleven	14	15	-1	-6.70%
1000222		7-Eleven	15	16	-1	-6.30%
110074		7-Eleven	15	16	-1	-6.30%
51913		Krispy Krunchy	15	16	-1	-6.30%
91507		Circle K	15	16	-1	-6.30%
21724		Shell	16	17	-1	-5.90%
91508		7-Eleven	16	17	-1	-5.90%
92804		7-Eleven	17	18	-1	-5.60%
1		Sbarro	27	0	27	0.00%




## Case 4: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

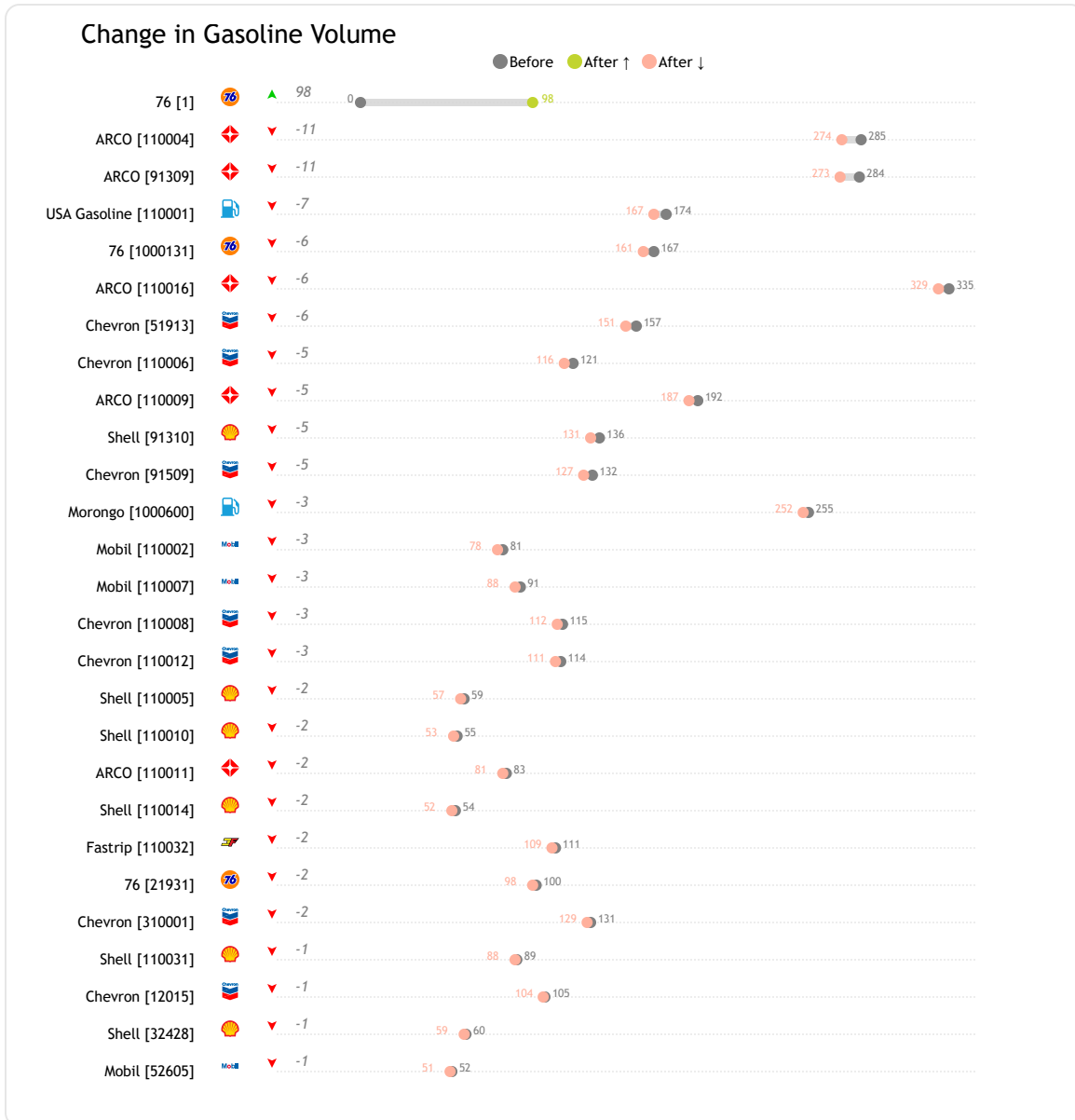
Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
110005		Shell	1,346	1,450	-104	-7.20%
51913		Chevron	1,462	1,575	-113	-7.20%
91309		ARCO	2,042	2,200	-158	-7.20%
91310		Shell	1,601	1,725	-124	-7.20%
91509		Oak Valley	1,972	2,125	-153	-7.20%
110007		Mobil	859	925	-66	-7.10%
110011		ARCO	1,029	1,100	-71	-6.50%
110016		ARCO	1,686	1,800	-114	-6.30%
21931		Circle K	1,125	1,200	-75	-6.30%
32428		Shell	1,547	1,650	-103	-6.20%
1000600		Morongo	1,188	1,250	-62	-5.00%
310002		Morongo	2,151	2,250	-99	-4.40%
21724		Shell	1,695	1,750	-55	-3.10%
210038		Chevron	1,505	1,550	-45	-2.90%
91507		Circle K	1,776	1,825	-49	-2.70%
110026		Shell	1,414	1,450	-36	-2.50%
91313		Chevron	2,344	2,400	-56	-2.30%

Site ID	Brand	Name	Change in Wash Volume			
			Projected	Actual	Vol Change	% Change
51917		Yucaipa Car Wash	2,396	2,450	-54	-2.20%
1000292		Chevron	1,176	1,200	-24	-2.00%
92610		ARCO	2,351	2,400	-49	-2.00%
51907		Chevron	2,015	2,050	-35	-1.70%
210030		Shell	886	900	-14	-1.60%
210029		Mobil	1,604	1,628	-24	-1.50%
1		Independent	1,683	0	1,683	0.00%

# Case 4: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

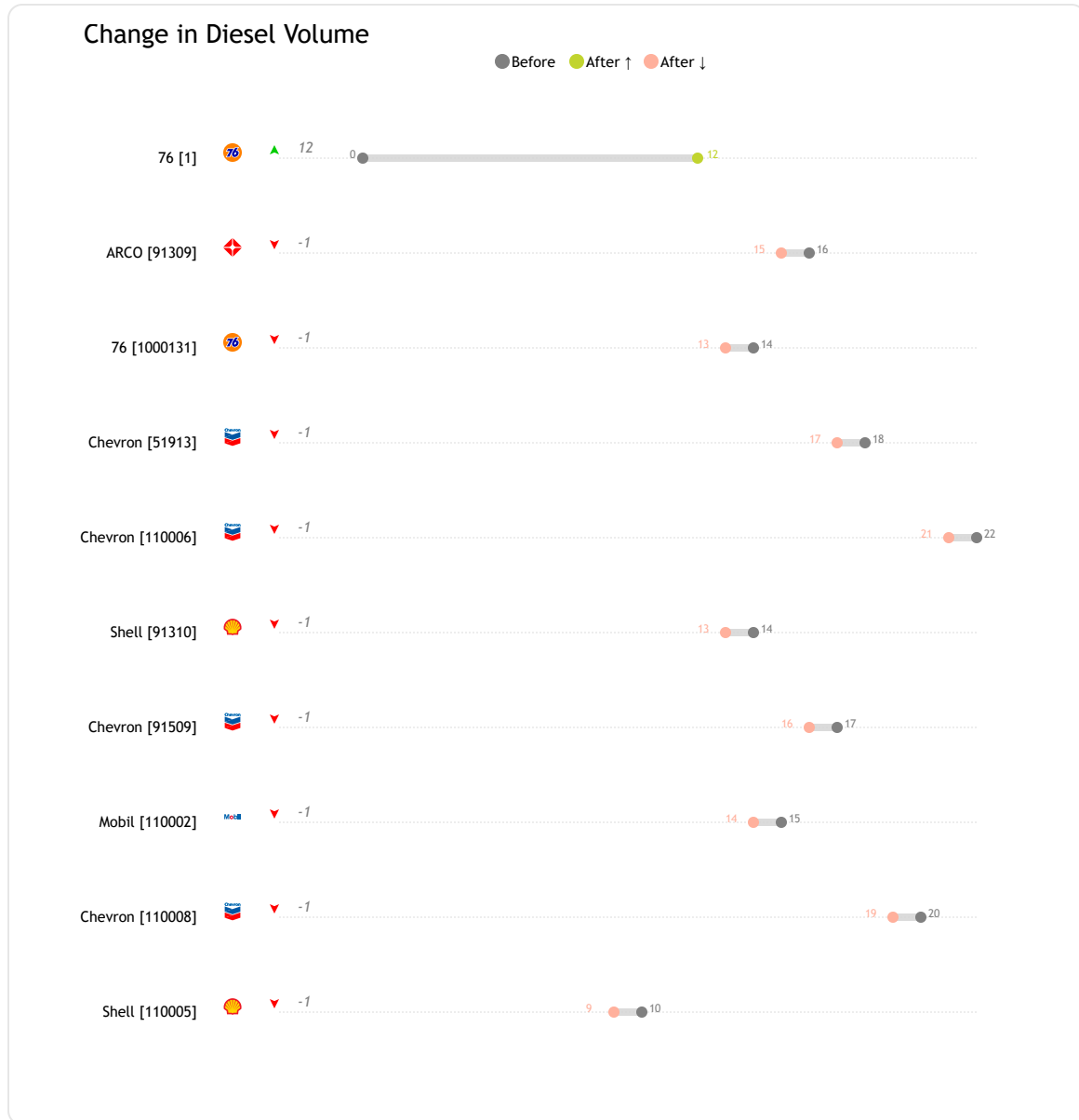


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 4: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

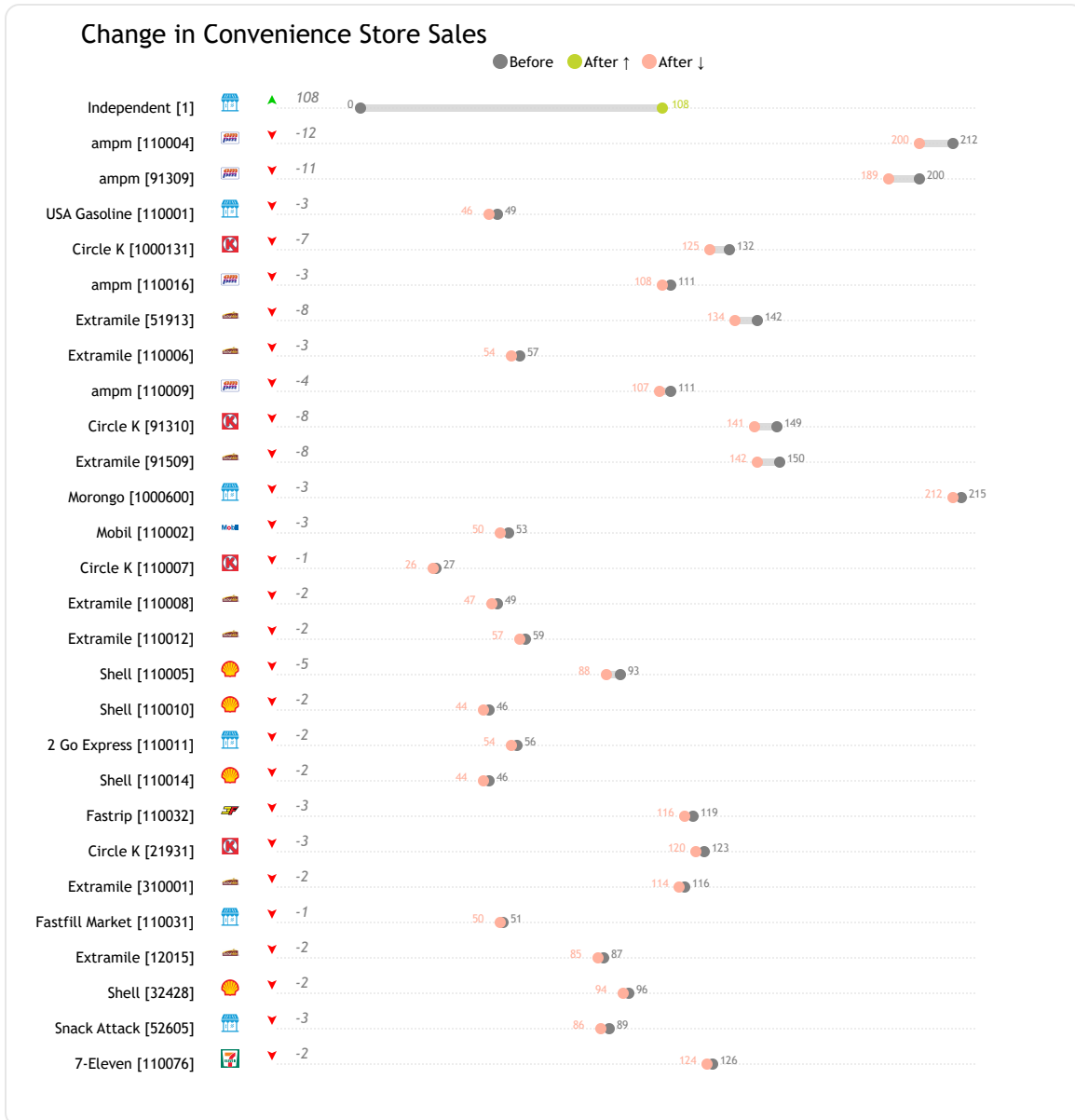


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 4: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

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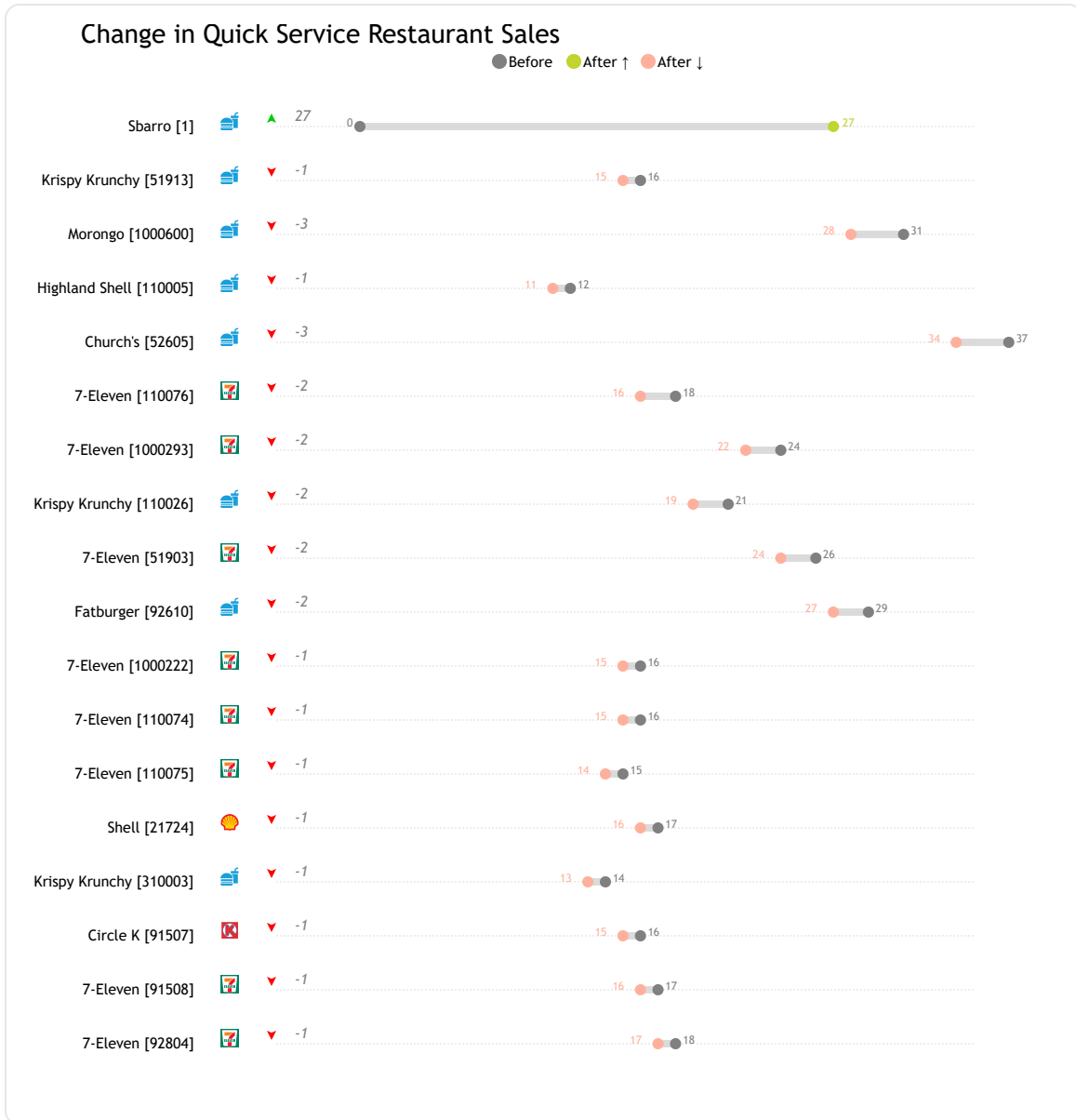


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 4: Impact on competitor volumes within the local area

# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA

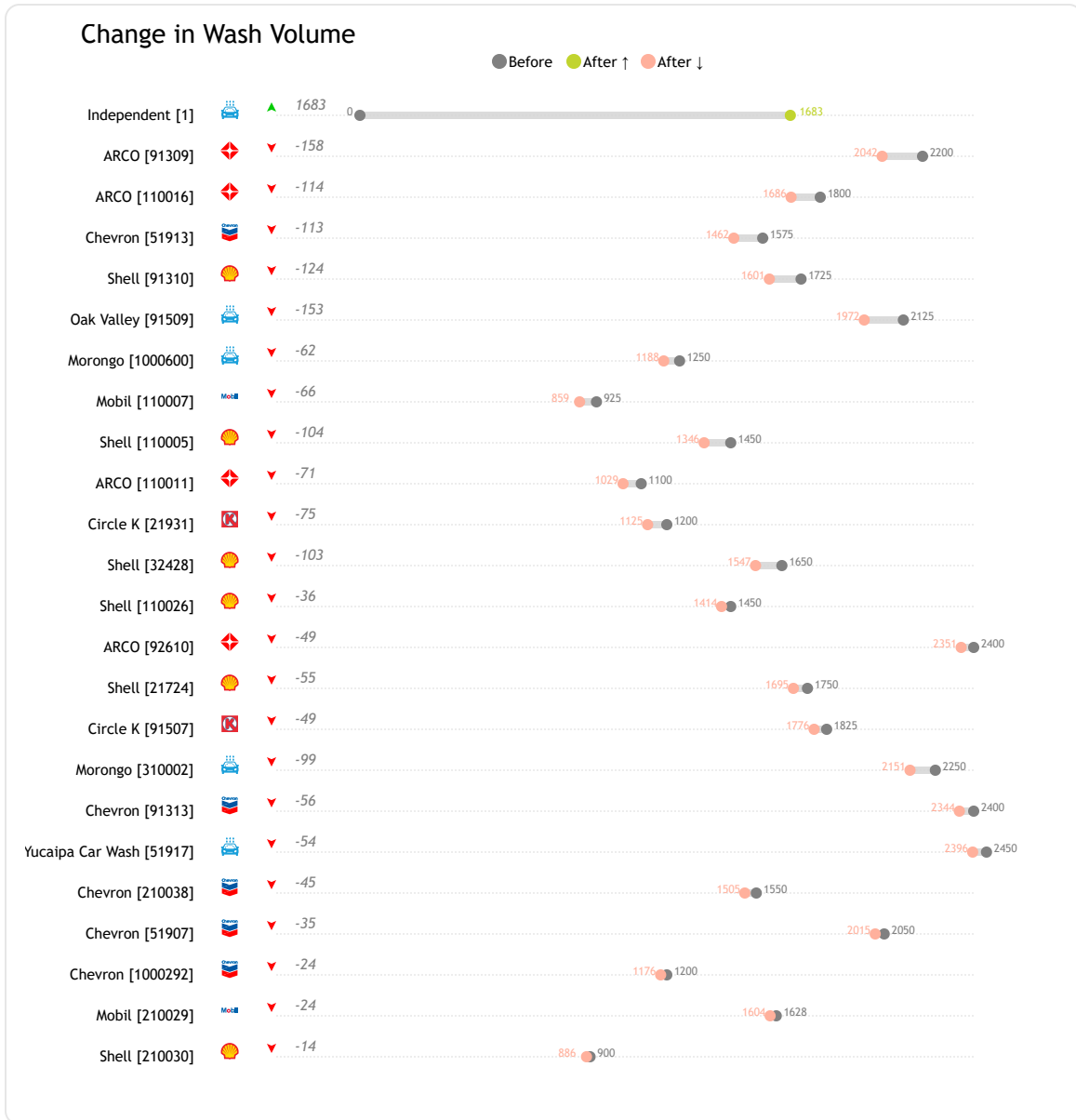


\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

# Case 4: Impact on competitor volumes within the local area

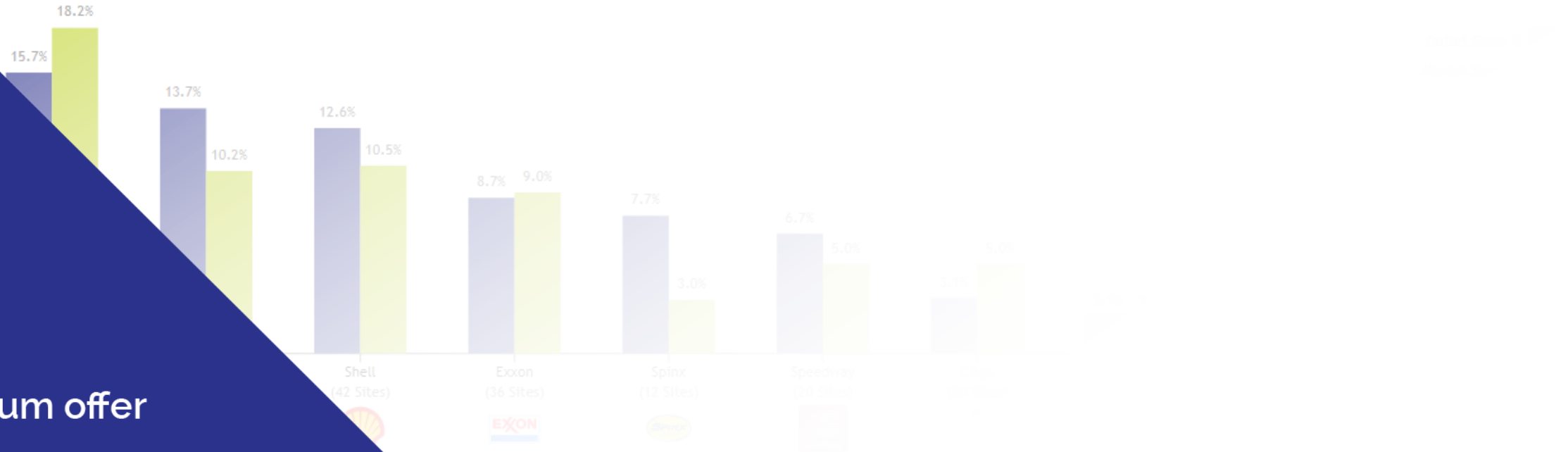
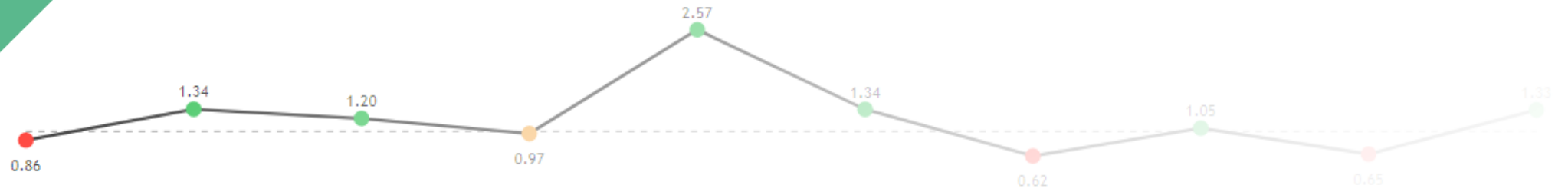
# JSJ Property Holdings LLC

East 6th Street and Pennsylvania Avenue, Beaumont, CA 92223, USA



\* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Car Wash Volume: Car Washed/Month. Distances: Miles. Prices: \$

## Market share overview



## Premium offer

Contact Kalibrate to unlock  
[single-sites@kalibrate.com](mailto:single-sites@kalibrate.com)

## Subject site "7 Elements" Volumes

JSJ Property Holdings

East 6th Street and Pennsylvania Avenue, Beaumont, CA 94804

### By Product

Product	Location	Market	Brand	Facility	Merchandising	Price
	87	83 ▼	78 ▼	96 ▲	103 ▲	103 ▲
esel	11	10 ▼	10 ▼	11 ▲	11 ▼	11 ▼
5	112	107 ▼	80 ▼	133 ▲	134 ▲	134 ▲
	80	70 ▼	66 ▼	75 ▲	96 ▲	96 ▲



## Premium offer

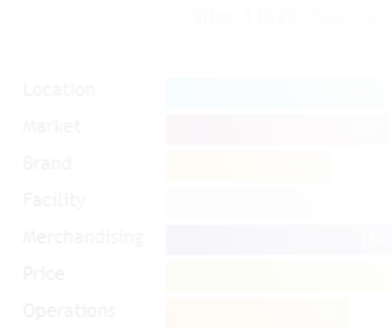
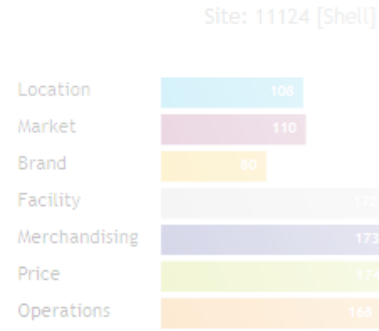
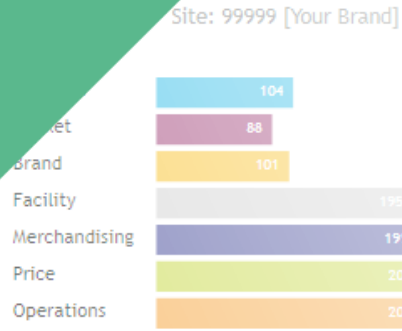
Contact Kalibrate to unlock  
[single-sites@kalibrate.com](mailto:single-sites@kalibrate.com)

Distances: Miles.

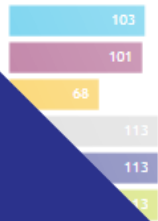


# Local Area "7 Elements" volumes

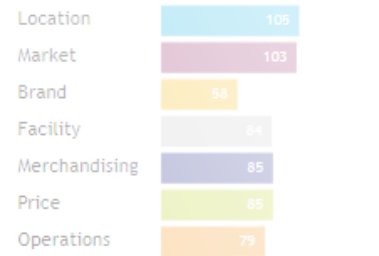
## BY SITE



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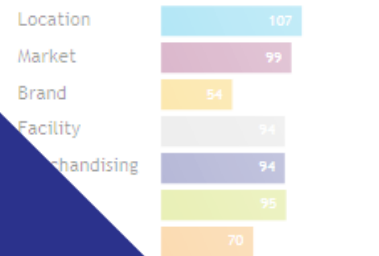
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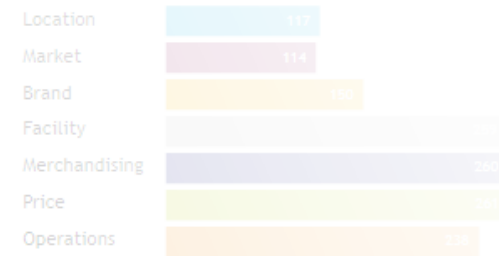
Site: 10009 [Shell]



Site: 12710 [BP]



Site: 11640 [Spinx]



Premium offer

Contact Kalibrate to unlock  
[single-sites@kalibrate.com](mailto:single-sites@kalibrate.com)



# Competitors in the Local Area

# Competitor photo and attributes



General		Location/Ratings		Traffic	
Site ID	110002	Has Canopy	✓	Primary St Barrier	Double Yellow Lines
Appearance	Average	Hi Rise Sign	✓	Primary St Number of Thru Lanes	2
Date Survey	1/17/2023 15:56	Landscaping	Minimal	Primary St Traffic Count	11500
Operation Type	Independent	Location Type	Interstate	Primary Street Remote Access	x
Site Direction	NE	Low Small Sign	x	Secondary St Barrier	None
Site Location	Corner	Oasis	x	Secondary St Number of Thru Lanes	2
Site Name	Mobil Gas Station	Stop Fuel Or Truck	x	Secondary St Remote Access	x
Visibility	Average			Secondary St Traffic Count	4500
				Street1 Near Traffic Control	x
				Street2 Near Traffic Control	✓

Location/Ratings	
Blockage	x

Fuel	
Bypass Lanes	1
Diesel Brand Name	Mobil
GasBrand Name	Mobil
Layout of Forecourt	Perpendicular
Diesel Offered	✓
GasOffered	✓

Prices/Service/Hours	
Attend Service	x
Average Discount	10
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	539.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	439.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

Cstore	
Cash Registers	1
Cooler Doors	13
Dedicated Park. Spaces	3
External Merchandising	Average
Hypermarket	x
Shop Brand	Mobil
Shop Offered	✓
Shop Type	C-Store

Carwash	
Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
Bay Car Wash	x

Other	
Wash Distance to Nearest Competitor	0.16
Wash Competitors	6
Shop Competitors	9
QSR Distance to Nearest Competitor	0.16
Number of QSR Competitors	2
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	9
Distance to Nearest GasOffer (Kms)	0.08
Distance to Nearest Diesel Offer (Kms)	0.16
Distance to Nearest C-Store Offer (Kms)	0.08
Diesel Competitors	8
Auto Repair Bays	0

Pumps/Fueling Positions	
Diesel Pumps	4
Diesel SFP	8
Fueling Position Penalty	x
Gas Pumps	6
Gas SFPs	12
Pump Islands (info only)	3

Products	
Bakery	x
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Small
Cstore Selling Area	1862
Deli	x
Has Kitchen	x
Offers Wine Liquor	x

Food	
QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

Volumes	
Diesel Volume	15
Gas Volume	81
Shop Volume	53

Prices/Service/Hours	
Monday Sunday Hours Open	24

# Competitor photo and attributes



401 6 St / Beaumont Ave

General		Location/Ratings		Traffic					
Site ID	110001	Has Canopy	✓	Primary St Barrier	None				
Appearance	Average	Hi Rise Sign	x	Primary St Number of Thru Lanes	2				
Date Survey	1/17/2023 15:56	Landscaping	Minimal	Primary St Traffic Count	11500				
Operation Type	Company	Location Type	Interstate	Primary Street Remote Access	x				
Site Direction	SE	Low Small Sign	x	Secondary St Barrier	None				
Site Location	Corner	Oasis	x	Secondary St Number of Thru Lanes	2				
Site Name	USA Gasoline Gas Station	Stop Fuel Or Truck	x	Secondary St Remote Access	x				
Visibility	Average			Secondary St Traffic Count	11500				
				Street1 Near Traffic Control	✓				
				Street2 Near Traffic Control	✓				
Location/Ratings									
Blockage	x								
Fuel		Prices/Service/Hours		Cstore		Carwash		Other	
Bypass Lanes	2	Attend Service	x	Cash Registers	2	Wash Offered	x	Wash Distance to Nearest Competitor	0.24
Diesel Brand Name	N/A	Average Discount	0	Cooler Doors	10	Wash Brand Name	N/A	Wash Competitors	5
Layout of Forecourt	Parallel	DieselAttd Grade1 Price	0	Dedicated Park. Spaces	6	Short Tunnel	x	Shop Competitors	8
GasBrand Name	USA Gasoline	DieselAttd Grade1 Price Posted	x	External Merchandising	Average	Long Tunnel	x	QSR Distance to Nearest Competitor	0.24
Diesel Offered	x	DieselSelf Grade1 Price	0	Hypermarket	x	Bay Car Wash	x	Number of QSR Competitors	1
GasOffered	✓	DieselSelf Grade1 Price Posted	x	Shop Brand	USA Gasoline			Has Toilets For Customers	✓
		Fuel Saturday Hours Open	24	Shop Offered	✓			Has ATM	✓
		Fuel Sunday Hours Open	24	Shop Type	C-Store			GasCompetitors	8
		GasAttd Grade1 Price	0					Distance to Nearest GasOffer (Kms)	0.08
		GasAttd Grade1 Price Posted	x					Distance to Nearest Diesel Offer (Kms)	0.08
		GasSelf Grade1 Price	419.9					Distance to Nearest C-Store Offer (Kms)	0.08
		GasSelf Grade1 Price Posted	✓					Diesel Competitors	8
		Opening Hours (Mon-Fri)	24					Auto Repair Bays	0
		Pay At CStore	✓						
		Pay At Pump	✓						
Pumps/Fueling Positions				Products					
Diesel Pumps	0			Bakery	x	QSR Has Drive Thru	x		
Diesel SFP	0			Coffee Type Barista	x	QSR Brand Name	N/A		
Fueling Position Penalty	x			Coffee Type Bean To Cup	x	Catering	x		
Gas Pumps	4			Coffee Type Dispense	✓				
Gas SFPs	8			Cold Beer Size	N/A				
Pump Islands (info only)	2			Cstore Selling Area	1646				
				Deli	x				
				Has Kitchen	x				
				Offers Wine Liquor	x				
				Prices/Service/Hours					
				Monday Sunday Hours Open	24				
								Volumes	
								Gas Volume	174
								Shop Volume	49

# Competitor photo and attributes



325 Luis Estrada Rd / W @ Beaumont Ave

General		Location/Ratings		Traffic					
Site ID	51913	Has Canopy	✓	Primary St Barrier	None				
Appearance	Average	Hi Rise Sign	✓	Primary St Number of Thru Lanes	1				
Date Survey	1/16/2023 23:26	Landscaping	Minimal	Primary St Traffic Count	27000				
Operation Type	Independent	Location Type	Interstate	Primary Street Remote Access	x				
Site Direction	SW	Low Small Sign	x	Secondary St Barrier	None				
Site Location	At Location	Oasis	x	Secondary St Number of Thru Lanes	2				
Site Name	Chevron Gas Station	Stop Fuel Or Truck	✓	Secondary St Remote Access	x				
Visibility	Average			Secondary St Traffic Count	23500				
				Street1 Near Traffic Control	✓				
				Street2 Near Traffic Control	✓				
Location/Ratings									
Blockage	x								
Fuel		Prices/Service/Hours		Cstore		Carwash		Other	
Bypass Lanes	5	Attend Service	x	Cash Registers	2	Wash Offered	✓	Wash Distance to Nearest Competitor	0.27
Diesel Brand Name	Chevron	Average Discount	10	Cooler Doors	13	Wash Brand Name	Chevron	Wash Competitors	4
GasBrand Name	Chevron	DieselAttd Grade1 Price	0	Dedicated Park. Spaces	12	Short Tunnel	✓	Shop Competitors	7
Layout of Forecourt	Parallel	DieselAttd Grade1 Price Posted	x	External Merchandising	Average	Long Tunnel	x	QSR Distance to Nearest Competitor	1.78
Diesel Offered	✓	DieselSelf Grade1 Price	569.9	Hypermarket	x	Bay Car Wash	x	Number of QSR Competitors	1
GasOffered	✓	DieselSelf Grade1 Price Posted	✓	Shop Brand	Extramile			Has Toilets For Customers	✓
		Fuel Saturday Hours Open	24	Shop Offered	✓	Food		Has ATM	✓
		Fuel Sunday Hours Open	24	Shop Type	C-Store	QSR Has Drive Thru	x	GasCompetitors	7
		GasAttd Grade1 Price	0			QSR Brand Name	Krispy Krunchy	Distance to Nearest GasOffer (Kms)	0.16
		GasAttd Grade1 Price Posted	x	Products				Distance to Nearest Diesel Offer (Kms)	0.16
		GasSelf Grade1 Price	463.9	Bakery	✓	Catering	✓	Distance to Nearest C-Store Offer (Kms)	0.16
		GasSelf Grade1 Price Posted	✓	Coffee Type Barista	x			Diesel Competitors	6
		Opening Hours (Mon-Fri)	24	Coffee Type Bean To Cup	x			Auto Repair Bays	0
		Pay At CStore	✓	Coffee Type Dispense	✓			Volumes	
		Pay At Pump	✓	Cold Beer Size	Large			Car Wash Volume	1575
				Cstore Selling Area	2626			Diesel Volume	18
				Deli	x			Gas Volume	157
				Has Kitchen	x			QSR Sales	16
				Offers Wine Liquor	x			Shop Volume	142
				Prices/Service/Hours					
				Monday Sunday Hours Open	24				

# Competitor photo and attributes



General		Location/Ratings		Traffic	
Site ID	91309	Has Canopy	✓	Primary St Barrier	None
Appearance	Above Average	Hi Rise Sign	x	Primary St Number of Thru Lanes	2
Date Survey	1/17/2023 15:57	Landscaping	Significant	Primary St Traffic Count	23500
Operation Type	Jobber	Location Type	City Street	Primary Street Remote Access	x
Site Direction	NE	Low Small Sign	✓	Secondary St Barrier	None
Site Location	At Location	Oasis	x	Secondary St Number of Thru Lanes	3
Site Name	ARCO Gas Station	Stop Fuel Or Truck	x	Secondary St Remote Access	x
Visibility	Average			Secondary St Traffic Count	2500
				Street1 Near Traffic Control	✓
				Street2 Near Traffic Control	✓
Location/Ratings					
Blockage	x				

Fuel	
Bypass Lanes	5
Diesel Brand Name	ARCO
GasBrand Name	ARCO
Layout of Forecourt	Parallel
Diesel Offered	✓
GasOffered	✓

Prices/Service/Hours	
Attend Service	x
Average Discount	0
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	529.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	429.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

Cstore	
Cash Registers	2
Cooler Doors	13
Dedicated Park. Spaces	12
External Merchandising	Average
Hypermarket	x
Shop Brand	ampm
Shop Offered	✓
Shop Type	C-Store

Carwash	
Wash Offered	✓
Wash Brand Name	ARCO
Short Tunnel	✓
Long Tunnel	x
Bay Car Wash	x

Other	
Wash Distance to Nearest Competitor	0.06
Wash Competitors	4
Shop Competitors	7
QSR Distance to Nearest Competitor	0.27
Number of QSR Competitors	2
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	7
Distance to Nearest GasOffer (Kms)	0.06
Distance to Nearest Diesel Offer (Kms)	0.06
Distance to Nearest C-Store Offer (Kms)	0.06
Diesel Competitors	6
Auto Repair Bays	0

Pumps/Fueling Positions	
Diesel Pumps	5
Diesel SFP	6
Fueling Position Penalty	x
Gas Pumps	8
Gas SFPs	16
Pump Islands (info only)	4

Products	
Bakery	✓
Coffee Type Barista	x
Coffee Type Bean To Cup	✓
Coffee Type Dispense	✓
Cold Beer Size	Medium
Cstore Selling Area	3229
Deli	✓
Has Kitchen	✓
Offers Wine Liquor	✓

Food	
QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

Volumes	
Car Wash Volume	220
	0
Gas Volume	284
Shop Volume	200

Prices/Service/Hours	
Monday Sunday Hours Open	24

# Competitor photo and attributes



## General

Site ID	91310
Appearance	Above Average
Date Survey	1/17/2023 15:56
Operation Type	Independent
Site Direction	SW
Site Location	Corner
Site Name	Shell Gas Station
Visibility	Average

## Location/Ratings

Blockage	✓
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## Location/Ratings

Has Canopy	✓
Hi Rise Sign	x
Landscaping	Significant
Location Type	City Street
Low Small Sign	✓
Oasis	x
Stop Fuel Or Truck	x

## Traffic

Primary St Barrier	None
Primary St Number of Thru Lanes	3
Primary St Traffic Count	23500
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru Lanes	2
Secondary St Remote Access	x
Secondary St Traffic Count	2500
Street1 Near Traffic Control	✓
Street2 Near Traffic Control	✓

## Fuel

Bypass Lanes	5
Layout of Forecourt	Parallel
Diesel Brand Name	Shell
GasBrand Name	Shell
Diesel Offered	✓
GasOffered	✓

## Pumps/Fueling Positions

Diesel Pumps	4
Diesel SFP	8
Fueling Position Penalty	x
Gas Pumps	8
Gas SFPs	16
Pump Islands (info only)	4

## Prices/Service/Hours

Attend Service	x
Average Discount	10
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	569.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	459.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Cstore

Cash Registers	2
Cooler Doors	29
Dedicated Park. Spaces	13
External Merchandising	Average
Hypermarket	x
Shop Brand	Circle K
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	✓
Coffee Type Barista	x
Coffee Type Bean To Cup	✓
Coffee Type Dispense	✓
Cold Beer Size	Large
Cstore Selling Area	3046
Deli	x
Has Kitchen	✓
Offers Wine Liquor	✓

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	✓
Wash Brand Name	Shell
Short Tunnel	✓
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

## Other

Wash Distance to Nearest Competitor	0.06
Wash Competitors	3
Shop Competitors	5
QSR Distance to Nearest Competitor	0.31
Number of QSR Competitors	1
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	5
Distance to Nearest GasOffer (Kms)	0.06
Distance to Nearest Diesel Offer (Kms)	0.06
Distance to Nearest C-Store Offer (Kms)	0.06
Diesel Competitors	4
Auto Repair Bays	0

## Volumes

Car Wash Volume	172
	5
Gas Volume	136
Shop Volume	149

# Competitor photo and attributes



## General

Site ID	110005
Appearance	Average
Date Survey	1/17/2023 15:56
Operation Type	Independent
Site Direction	W
Site Location	Inside
Site Name	Shell Gas Station
Visibility	Above Average

## Location/Ratings

Blockage	x
----------	---

## Location/Ratings

Has Canopy	✓
Hi Rise Sign	✓
Landscaping	Minimal
Location Type	Interstate
Low Small Sign	x
Oasis	x
Stop Fuel Or Truck	x

## Traffic

Primary St Barrier	None
Primary St Number of Thru Lanes	2
Primary St Traffic Count	30500
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru Lanes	0
Secondary St Remote Access	x
Secondary St Traffic Count	0
Street1 Near Traffic Control	x
Street2 Near Traffic Control	x

## Fuel

Bypass Lanes	3
Layout of Forecourt	Parallel
Diesel Brand Name	Shell
GasBrand Name	Shell
Diesel Offered	✓
GasOffered	✓

## Pumps/Fueling Positions

Diesel Pumps	1
Diesel SFP	2
Fueling Position Penalty	x
Gas Pumps	5
Gas SFPs	10
Pump Islands (info only)	3

## Prices/Service/Hours

Attend Service	x
Average Discount	12
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	529.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	481.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Cstore

Cash Registers	1
Cooler Doors	9
Dedicated Park. Spaces	0
External Merchandising	Average
Hypermarket	x
Shop Brand	Shell
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	x
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Small
Cstore Selling Area	2949
Deli	✓
Has Kitchen	✓
Offers Wine Liquor	✓

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	✓
Wash Brand Name	Shell
Short Tunnel	✓
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	Highland Shell
Catering	✓

## Other

Wash Distance to Nearest Competitor	0.2
Wash Competitors	1
Shop Competitors	6
QSR Distance to Nearest Competitor	1.78
Number of QSR Competitors	0
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	6
Distance to Nearest GasOffer (Kms)	0.05
Distance to Nearest Diesel Offer (Kms)	0.05
Distance to Nearest C-Store Offer (Kms)	0.05
Diesel Competitors	5
Auto Repair Bays	0

## Volumes

Car Wash Volume	1450
Gas Volume	59
QSR Sales	12
Shop Volume	93



# Competitor photo and attributes



## General

Site ID	110004
Appearance	Average
Date Survey	1/17/2023 15:57
Operation Type	Jobber
Site Direction	NW
Site Location	Corner
Site Name	ARCO Gas Station
Visibility	Average

## Location/Ratings

Has Canopy	✓
Hi Rise Sign	x
Landscaping	Minimal
Location Type	Interstate
Low Small Sign	x
Oasis	x
Stop Fuel Or Truck	x

## Traffic

Primary St Barrier	Full Barrier
Primary St Number of Thru Lanes	2
Primary St Traffic Count	19500
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru Lanes	2
Secondary St Remote Access	x
Secondary St Traffic Count	13500
Street1 Near Traffic Control	✓
Street2 Near Traffic Control	✓

## Location/Ratings

Blockage	x
----------	---

## Fuel

Bypass Lanes	3
Diesel Brand Name	ARCO
GasBrand Name	ARCO
Layout of Forecourt	Parallel
Diesel Offered	✓
GasOffered	✓

## Prices/Service/Hours

Attend Service	x
Average Discount	0
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	559.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	439.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Pumps/Fueling Positions

Diesel Pumps	1
Diesel SFP	2
Fueling Position Penalty	x
Gas Pumps	4
Gas SFPs	8
Pump Islands (info only)	2

## Cstore

Cash Registers	2
Cooler Doors	18
Dedicated Park. Spaces	6
External Merchandising	Average
Hypermarket	x
Shop Brand	ampm
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	✓
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Medium
Cstore Selling Area	2895
Deli	x
Has Kitchen	✓
Offers Wine Liquor	✓

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

## Other

Wash Distance to Nearest Competitor	0.08
Wash Competitors	2
Shop Competitors	6
QSR Distance to Nearest Competitor	0.08
Number of QSR Competitors	1
Has Toilets For Customers	x
Has ATM	✓
GasCompetitors	6
Distance to Nearest GasOffer (Kms)	0.08
Distance to Nearest Diesel Offer (Kms)	0.08
Distance to Nearest C-Store Offer (Kms)	0.08
Diesel Competitors	5
Auto Repair Bays	0

## Volumes

Gas Volume	285
Shop Volume	212

# Competitor photo and attributes



290 Highland Springs Ave / 5 St

General		Location/Ratings		Traffic	
Site ID	110006	Has Canopy	✓	Primary St Barrier	None
Appearance	Average	Hi Rise Sign	✓	Primary St Number of Thru Lanes	2
Date Survey	1/17/2023 16:09	Landscaping	Significant	Primary St Traffic Count	30500
Operation Type	Independent	Location Type	Interstate	Primary Street Remote Access	x
Site Direction	NE	Low Small Sign	x	Secondary St Barrier	None
Site Location	Corner	Oasis	x	Secondary St Number of Thru Lanes	1
Site Name	Chevron Gas Station	Stop Fuel Or Truck	x	Secondary St Remote Access	x
Visibility	Average			Secondary St Traffic Count	3500
				Street1 Near Traffic Control	x
				Street2 Near Traffic Control	✓

## Fuel

Bypass Lanes	4
Diesel Brand Name	Chevron
GasBrand Name	Chevron
Layout of Forecourt	Parallel
Diesel Offered	✓
GasOffered	✓

## Pumps/Fueling Positions

Diesel Pumps	4
Diesel SFP	8
Fueling Position Penalty	x
Gas Pumps	4
Gas SFPs	8
Pump Islands (info only)	2

## Prices/Service/Hours

Attend Service	x
Average Discount	10
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	549.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	409.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Cstore

Cash Registers	1
Cooler Doors	9
Dedicated Park. Spaces	2
External Merchandising	Average
Hypermarket	x
Shop Brand	Extramile
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	x
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Small
Cstore Selling Area	1065
Deli	x
Has Kitchen	x
Offers Wine Liquor	x

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

## Other

Wash Distance to Nearest Competitor	0.05
Wash Competitors	5
Shop Competitors	11
QSR Distance to Nearest Competitor	0.05
Number of QSR Competitors	2
Has Toilets For Customers	x
Has ATM	✓
GasCompetitors	11
Distance to Nearest GasOffer (Kms)	0.05
Distance to Nearest Diesel Offer (Kms)	0.05
Distance to Nearest C-Store Offer (Kms)	0.05
Diesel Competitors	10
Auto Repair Bays	0

## Volumes

Diesel Volume	22
Gas Volume	121
Shop Volume	57

# Competitor photo and attributes



## General

Site ID	110007
Appearance	Average
Date Survey	1/17/2023 15:56
Operation Type	Independent
Site Direction	E
Site Location	Off Street
Site Name	Mobil Gas Station
Visibility	Average

## Location/Ratings

Blockage	✓
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## Location/Ratings

Has Canopy	✓
Hi Rise Sign	x
Landscaping	Minimal
Location Type	Interstate
Low Small Sign	✓
Oasis	x
Stop Fuel Or Truck	x

## Traffic

Primary St Barrier	None
Primary St Number of Thru Lanes	2
Primary St Traffic Count	23000
Primary Street Remote Access	✓
Secondary St Barrier	None
Secondary St Number of Thru Lanes	0
Secondary St Remote Access	x
Secondary St Traffic Count	0
Street1 Near Traffic Control	x
Street2 Near Traffic Control	x

## Fuel

Bypass Lanes	4
Diesel Brand Name	Mobil
GasBrand Name	Mobil
Layout of Forecourt	Parallel
Diesel Offered	✓
GasOffered	✓

## Pumps/Fueling Positions

Diesel Pumps	2
Diesel SFP	4
Fueling Position Penalty	x
Gas Pumps	6
Gas SFPs	12
Pump Islands (info only)	4

## Prices/Service/Hours

Attend Service	x
Average Discount	10
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	529.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	459.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Cstore

Cash Registers	1
Cooler Doors	11
Dedicated Park. Spaces	3
External Merchandising	Average
Hypermarket	x
Shop Brand	Circle K
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	x
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	N/A
Cstore Selling Area	936
Deli	x
Has Kitchen	x
Offers Wine Liquor	x

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	✓
Wash Brand Name	Mobil
Short Tunnel	✓
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

## Other

Wash Distance to Nearest Competitor	0.2
Wash Competitors	3
Shop Competitors	11
QSR Distance to Nearest Competitor	0.2
Number of QSR Competitors	2
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	11
Distance to Nearest GasOffer (Kms)	0.15
Distance to Nearest Diesel Offer (Kms)	0.15
Distance to Nearest C-Store Offer (Kms)	0.15
Diesel Competitors	10
Auto Repair Bays	3

## Volumes

Car Wash Volume	925
Diesel Volume	8
Gas Volume	91
Shop Volume	27

# Competitor photo and attributes



## General

Site ID	91509
Appearance	Above Average
Date Survey	1/17/2023 15:56
Operation Type	Company
Site Direction	N
Site Location	Inside
Site Name	Chevron Gas Station
Visibility	Average

## Location/Ratings

Blockage	x
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## Location/Ratings

Has Canopy	✓
Hi Rise Sign	x
Landscaping	Significant
Location Type	Shopping Center
Low Small Sign	✓
Oasis	x
Stop Fuel Or Truck	x

## Traffic

Primary St Barrier	None
Primary St Number of Thru Lanes	2
Primary St Traffic Count	5500
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru Lanes	0
Secondary St Remote Access	x
Secondary St Traffic Count	0
Street1 Near Traffic Control	x
Street2 Near Traffic Control	x

## Fuel

Bypass Lanes	5
Diesel Brand Name	Chevron
GasBrand Name	Chevron
Layout of Forecourt	Parallel
Diesel Offered	✓
GasOffered	✓

## Prices/Service/Hours

Attend Service	x
Average Discount	0
DieselAttd Grade1 Price	0
DieselAttd Grade1 Price Posted	x
DieselSelf Grade1 Price	569.9
DieselSelf Grade1 Price Posted	✓
Fuel Saturday Hours Open	24
Fuel Sunday Hours Open	24
GasAttd Grade1 Price	0
GasAttd Grade1 Price Posted	x
GasSelf Grade1 Price	489.9
GasSelf Grade1 Price Posted	✓
Opening Hours (Mon-Fri)	24
Pay At CStore	✓
Pay At Pump	✓

## Pumps/Fueling Positions

Diesel Pumps	3
Diesel SFP	6
Fueling Position Penalty	x
Gas Pumps	8
Gas SFPs	16
Pump Islands (info only)	4

## Cstore

Cash Registers	2
Cooler Doors	18
Dedicated Park. Spaces	12
External Merchandising	Average
Hypermarket	x
Shop Brand	Extramile
Shop Offered	✓
Shop Type	C-Store

## Products

Bakery	✓
Coffee Type Barista	x
Coffee Type Bean To Cup	x
Coffee Type Dispense	✓
Cold Beer Size	Large
Cstore Selling Area	5360
Deli	x
Has Kitchen	✓
Offers Wine Liquor	✓

## Prices/Service/Hours

Monday Sunday Hours Open	24
--------------------------	----

## Carwash

Wash Offered	✓
Wash Brand Name	Oak Valley
Short Tunnel	✓
Long Tunnel	x
Bay Car Wash	x

## Food

QSR Has Drive Thru	x
QSR Brand Name	N/A
Catering	x

## Other

Wash Distance to Nearest Competitor	1.88
Wash Competitors	1
Shop Competitors	2
QSR Distance to Nearest Competitor	1.88
Number of QSR Competitors	1
Has Toilets For Customers	✓
Has ATM	✓
GasCompetitors	2
Distance to Nearest GasOffer (Kms)	0.11
Distance to Nearest Diesel Offer (Kms)	0.11
Distance to Nearest C-Store Offer (Kms)	0.11
Diesel Competitors	2
Auto Repair Bays	0

## Volumes

Car Wash Volume	212
	5
Diesel Volume	17
Gas Volume	132
Shop Volume	150



# Appendix

# The 7 Elements for Fuel and Convenience Retail Success

The 7 Elements for Fuel and Convenience Retail Success are:



Location



Market



Brand



Facility



Merchandising



Price



Operations

Best-practice fuel retailers maximize performance by considering the role of each element in the daily tactics and strategic horizon of their sites. Optimizing the 7 Elements depends on a fuel retailer's specific business, but only an integrated focus ensures that every area of value is leveraged.

Six of the 7 Elements act as **"volume magnets"** to bring customers to site.

Location | Market | Brand | Facility | Merchandising | Operations

The remaining element, Price, provides the ability to make a decision. When you perform well in the volume magnet areas, you earn the right to make a decision on pricing. The 7 Elements framework informs all Kalibrate strategies and solutions. The practical application of this perspective is underpinned by extensive market data and sophisticated analytical models.



## Location

*Selection of fuel retail locations is a complex process with many variables to consider.*

Site location must be understood relative to consumers and their habits — where they live, work, go to school, run errands, and play. Concepts such as critical mass, demand, natural barriers, and competitive environment are just a few of the characteristics that distinguish marginal from exceptional site selections. Fuel retailers adding new locations must also consider the impact on their existing network and current competitors. For example, a location that's great for one fuel retailer may be poor for another, because its cannibalization profile could be dramatically different.



## Market

*Every fuel retail site exists in the context of a broader competitive landscape.*

Successful fuel retailers understand their competitors and have insight into how they might react to marketplace changes. They also know where their competitors are building, what they are building, how they operate, and how they price. Although hypermarkets have proven fierce competition to many, those who manage all 7 Elements are thriving even when competing with them.



## Brand

*Whether local hero or multinational giant, a company's ethos, quality, and consistency are reflected in its brand.*

Retailers should understand the position of their brand relative to critical mass and saturation. Before a fuel retailer reaches critical mass, the network is vulnerable to competitive threats and acquisitions. Once critical mass is achieved, new sites added to the network will experience greater gains in market share than in outlet share. In other words, as new sites are added to the network, volume share increases at a greater rate than outlet share. On the other hand, once a brand moves beyond saturation, it risks cannibalizing other sites in its own network.



## Facility

*A facility must fulfill the needs and demands of customers. That goes well beyond considerations about the physical building.*

Efficient flow through the purchase and shopping experience is crucial. For example, how easy is it to maneuver into the lot and around the property? Are there enough fueling positions to meet customer needs at peak times? Is parking space sufficient for the convenience store customer? What is the optimal number of cooler doors? Network consistency is also a factor, as it promotes familiarity with customers who like to know where to quickly pick up the products they need. Consistency is an often-overlooked challenge for fuel retailers with multiple channels of distribution.



## Merchandising

*Offering the right products and services, at the right time, at the right price, and with the right attitude, is the art and science of merchandising.*

Success depends on the correct product and price mix, adequate inventory, fresh merchandise, and a clean, neat appearance. Retailers with best-in-class merchandising practices emphasize category killers. These low-priced, low-margin, popular items draw customers into the store, and the right merchandising strategy leads the consumer to make impulse, high-margin purchases.



## Price

*Thrift-conscious behavior has always existed, and now it's become standard for a small set of price-conscious customers to aggressively scout out the lowest priced sites.*

As consumers, we all want to be sure that we're getting good value for our hard-earned dollar. But that doesn't translate into low pricing being the only tactic. Corporate strategies dictating pricing posture can be set to drive volume, profits, or a combination of the two. No matter what the strategy, the price must be perceived as competitive by customers.



## Operations

*Site-specific, personal, and intangible aspects of management and customer service should complement the investment at any given site.*

Finally, it's important to note that even the best facility and location in the world will have difficulty maintaining volume with inadequate operations. Customers expect quick service, courteous employees, well-stocked shelves, well-functioning equipment, and fresh food offerings. The impact of employees can't be overestimated. Well-trained, quality people who are retained over time will contribute positively to the bottom line.