

ANNUAL REPORT

2025



ČESKÁ ASOCIACE
PETROLEJÁŘSKÉHO
PRŮMYSLU A OBCHODU

CZECH ASSOCIATION OF PETROLEUM INDUSTRY AND TRADE

ANNUAL REPORT

2025

PRAGUE

June 2026

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CHAIRMAN'S MESSAGE

Dear ČAPPO Members, Partners, Ladies and Gentlemen,

The year 2025 confirmed again that the petroleum industry remains one of the key pillars of the European economy, energy security and of the daily lives of citizens. Even though Europe is in the midst of energy transformation, petroleum and petroleum products remain fundamental prerequisites for the functioning of transportation, industry, agriculture, integrated emergency response system and national defence.

Characteristic features of the past year were ongoing geopolitical instability, growing security risks, and, at the same time, intense debate about the future of the European energy sector, which is under regulatory pressure. The events of recent years and months have reminded us that energy security is not an abstract concept, but a fundamental prerequisite for economic prosperity and social stability. Without reliable energy deliveries, economic growth, competitiveness and the high standard of living of the population cannot be secured.

In 2025, the Czech petroleum sector demonstrated again its resilience, professionalism and ability to adapt to changing conditions. ČAPPO member companies ensured safe and uninterrupted supply to the market, continued to modernise infrastructure and invested in technologies contributing to the reduction of the environmental footprint of the entire branch.

At the same time, we also entered the debate about the shape of the national and European climate and energy policy. Nevertheless, we are convinced that the transformation of the energy and transportation sectors must be based on the principles of technological neutrality, economic feasibility, and maintaining the competitiveness of European industry.

Another important issue of the year 2025 was future availability of energy for citizens and companies. In this connection, ČAPPO repeatedly emphasised the need to carefully assess the impact of new regulatory measures, including the ETS 2 system, on households, businesses and overall competitiveness of the European economy. We are convinced that climate protection and economic prosperity must be compatible goals.

Let me thank all of the members of our Association for their active approach, professional co-operation and responsible entrepreneurship. My thanks also go to the thousands of employees across the entire industry – from the employees of the refineries, warehouses and logistic centres up to the employees of the service stations. Their day-to-day work is the foundation of the reliable operation of the system that is taken for granted by the majority of community.

I am convinced that the petroleum industry will form an important part of the energetic mix of both the Czech Republic and Europe also in the future.

On behalf of the Czech Association of Petroleum Industry and Trade, I would like to thank all of the partners for co-operation and confidence.

Yours faithfully,

Mgr. Jan Duspěva
Council Chairman

Prague, June 2026

CHARACTERISTICS OF THE DEVELOPMENT OF PETROLEUM INDUSTRY AND TRADE IN THE CZECH REPUBLIC

BASIC INFORMATION

In 2025, the situation in Czech refinery industry and trade was stable.

In 2025, petroleum imports to the CR were effectuated according to the needs of the refineries as well as sales opportunities for refinery products. In 2025, petroleum imports to the CR reached 6,859 thousand tons, which is by 5.5% more than in 2024. After the first quarter of 2025, petroleum imports from the Russian Federation ceased; petroleum was imported from Azerbaijan (42 %), Norway (21 %), Kazakhstan (16 %) and Saudi Arabia (11 %). In 2025, a small quantity of local petroleum was exported, in particular to Moldavia.

Total deliveries of selected petroleum products onto the market in the CR in 2025 are shown in Table No. 1.

Table No. 1

Source: ČSÚ (Czech Statistical Office)

Product	Thousand tons	Index 2025/2024
Unleaded petrol, incl. biocomponent	1,830	101.8
Jet fuel	463	102.0
Diesel fuel, incl. biocomponent	5,494	102.0
Heating and other gas oils	25	156.3
Heating oils up to 1% sulphur m/m	9	100.0
Heating oils with more than 1% sulphur m/m	45	88.2
Total LPG	368	89.5
Lubricating oils and other oils in total	156	109.1
Bitumen and bitumen products	506	103.5
Biocomponents for transport	432	96.2

Table No. 2 shows the octane structure of the range of sold petrol.

Table No. 2

Product	Share (%)
Petrol with octane number 95 (SUPER)	91.5
Petrol with octane number min. 98 and more (SUPER PLUS)	8.5

Source: ČSÚ/MPO (Czech Statistical Office / Ministry of Industry and Trade)

In the Czech Republic, a part of diesel fuel consumption is covered by imports; specifically in 2025 it was 42% of consumption. According to the data from the Czech Statistical Office (data including biocomponents), 3,216 thousand tons of diesel fuel were imported (mainly from Germany and Slovakia), and 909 thousand tons of it were exported (mainly to Slovakia) in 2024. As for petrol, including biocomponents, 862

thousand tons were imported (mainly from Germany and Slovakia), and 705 thousand tons were exported (mainly to Germany and Slovakia).

In the long-term perspective, it is true that the motor fuels quality in the Czech Republic is very good, also in comparison with other EU countries. In 2025, the inspectors of the Czech Trade Inspection (ČOI) collected 2,425 samples of all kinds of motor fuels at the public service stations in the Czech Republic and only 10 of them (0.4%) did not meet the standard. At service stations operated by ČAPPO members, 979 samples, i.e. 40%, were collected and only 1 did not meet the standard. Thus, in 2025, ČAPPO member companies achieved again outstanding results in the area of quality of sold motor fuels. We believe that the consistent, long-time and enduring efforts of ČAPPO member companies, as well as ČAPPO's endeavours to maintain the high quality of motor fuels, play a significant role in this result.

The results of the checks are indicated in Table No. 3.

Table No. 3

Product	Total of samples collected	Number of samples that did not meet ČSN standards	%	Non-compliant samples at ČAPPO member companies
Petrol	955	4	0.4%	0
Diesel fuel	1,139	4	0.4%	0
Paraffinic oil	4	1	25.0%	0
LPG and CNG	327	1	0.3%	1
Total	2,425	10	0.4%	0

Source: ČOI (Czech Trade Inspection)

In recent years, number of service stations in the Czech Republic remains practically unchanged. Based on the data from the Ministry of Industry and Trade (*Report on Update and Status of the Records of Service Stations in the Czech Republic at 9 June 2025*), the total of 7,733 service stations and fuels delivery points, including 3,948 public and the remaining number of service stations selling to specified entities and non-public facilities, were operated on the market of the Czech Republic. In comparison with the number reported in the previous statistical check, total number of service stations increased by 11. Based on their number and importance, the decisive segment on the market are service stations selling more types of motor fuels and, usually, offering also other services. Their number now achieves 2,855 and remains more or less the same for many years (in late 2015, 2,807 service stations of this type were operated).

LPG is available at 941 service stations, CNG at 238 and LNG at 9 stations. Currently, there are 3 hydrogen filling stations.

The number of electric vehicles charging stations grows rapidly: their number achieved 3,758 (with 6,588 charging points) and the number of charging stations with a higher output grows rapidly, too (there are 239 charging stations with an output of

300 kW and more, 186 charging stations with an output between 200 and 299 kW and 324 with an output between 100 and 199 kW).

Petroleum industry and trade in 2025:

- Total consumption of motor fuels (including biocomponent) made 8,926 billion litres (7,324 thousand tons), which is more than in 2024 by 2.0%. The decisive share has diesel fuel (72.9% of the volume).
- According to the Czech Statistical Office, the gross consumption of biocomponents made 152 thousand tons in petrol and 280 thousand tons in diesel fuel.
- Diesel fuel with hydrotreated vegetable oil (HVO) was sold on the market in significant quantities, several service stations sell 100% HVO and their number grows.
- Petrol with octane number 95 is mainly in the E10 quality, with regard to emissions savings, petrol with octane number 98 in the E10 quality (with the addition of ETBE) is already longer on the market.
- The member companies complied with the requirements for the reduction of greenhouse gases emissions originating from motor fuels combustion.
- The consumption of LPG for motor drive made up 80.7 thousand tons; i.e. 4.7% less in comparison with its consumption in the previous year.
- At the service stations of ČAPPO member companies, sales in shops and catering sections continued to grow.
- In the Czech Republic, the petroleum products market has been constantly negatively affected by the frequently changing regulatory environmental measures, which fact reduces its competitiveness.

ACTIVITIES OF THE CZECH ASSOCIATION OF PETROLEUM INDUSTRY AND TRADE

Long-term priorities of ČAPPO

- To be constantly the responsible entity (a guarantee) and referential point for motor fuels quality, including alternative fuels

The quality of motor fuels sold in the distribution network of ČAPPO members is constantly very good, and the same as in the previous years, in 2025, too, it was better than the average on the market in the CR and significantly better than the average in EU countries, also thanks to the consistent care of the member companies concerning quality and use value of the motor fuels, certification of the producers, distributors and transporters, implementation of own quality control systems or the involvement of some of the member companies in the SGS “Seal of Quality” programme.

- To strive constantly for the transparent and fair legislation and competition on the motor fuels market (in co-operation with both governmental agencies and non-governmental institutions)

ČAPPO fulfils this task through its activities in the field of legislation, co-operation with the governmental agencies, engagement of its representatives in the working

groups of various ministries and industry-related unions and associations, and through its contacts with the members of the Chamber of Deputies of the Parliament of the CR and with the senators. It continues to inform the governmental agencies about the shortcomings and fraud risks in petroleum industry business.

- To maintain constantly high safety standards in motor fuels distribution and service stations operations for the employees and customers

This priority has been constantly fulfilled through ČAPPO Working Group Safety and Specialised Section Motor Fuels Transport. They regularly debate emergency events and safety incidents with the aim of the exchange of experience. The Working Group Safety will start dealing with a relatively new area of safety risks of the co-existence of the classic and alternative fuels and their technology at service stations.

- To ensure the fulfilment of the plan to reduce greenhouse gases emissions by 6% from the year 2021

In 2025, the ČAPPO members who are obliged entities according to the Act on Air Protection fulfilled the plan to reduce greenhouse gases emissions in spite of considerable costs.

- To maintain and constantly improve positive image of ČAPPO in the media as professional industry institution in the field of petroleum industry and trade

Under the auspices of the Ministry of Transport, event “Alternative Energy Days” was organised on 14 April 2025 within the framework of the European project Tour D’Europe in co-operation with Fuels Europe and the Bosch Group. The goal was to raise awareness of the current widespread availability of liquid renewable fuels or low-carbon fuels with significant emission reductions in Europe and to highlight their role in rapidly achieving the EU’s climate goals by utilizing existing fuel station infrastructure and internal combustion engines. In the course of the event, its attendees also had the opportunity to learn about low-emission vehicles commonly available on the EU market.

On 6 November 2025, the sixteenth year of the traditional conference Petrol Summit 25, focused mainly on current activities in the area of motor fuels, was organised. The full-day programme featured an inspiring gathering of experts, market leaders and innovators who met to explore key topics related to the future of mobility. The main focus was on energy and legislative changes, particularly the introduction of the ETS 2 emissions trading system for transportation and households. The attendees discussed current trends in transport, expected trends in energy consumption, development of infrastructure for alternative fuels as well as ensuring energy security. The “Service Station of the Year” Award was presented to the company SHELL (Service Station Shell D4 – Krsice. Mr. Miroslav Stříbrský from Unicode Systems was recognized as the “Personality of the Year”.

The Chairman and members of the Council, the Executive Director and, in particular, the technical spokesman supplied a number of articles, interviews and expert positions concerning the issues of the motor fuels, their quality and range, problems

of biofuels and alternative fuels, and the situation on the service stations market to the media (for example MF Dnes, Lidové noviny, E15, Svět motorů, ČT1, ČT24, TV Nova and TV Prima, Český rozhlas, Seznam.cz).

PRINCIPAL ISSUES DEBATED IN 2025

Green Deal, Fit for 55

After a long period of preparations, the implementation of the RED III Directive was completed. The basic target in the Czech Republic for the year 2030 is formulated as the achievement of 11% savings of emissions, while the RED III target is 14.5%. The lowering of the target is achieved through the capping of the 1st generation biofuels at 5.6% and including the emission savings from renewable electricity in the road and railway transports, while the emissions target is not directly determined for the suppliers of electricity. As regards the advanced biofuels (from the raw materials according to Appendix IXa of the Directive) and for RFNBO, in accordance with the RED III Directive, a share of 5.5% e/e is envisaged (including 1% e/e RFNBO).

The process of the RED III implementation was quite fragmented: the issues connected with liquid fuels are under the responsibility of the Ministry of Environment, while the issues connected with gaseous fuels and electric power fall under the responsibility of the Ministry of Industry and Trade. Thus, the co-ordination of both ministries on the working level was sometimes lacking, and, moreover, the implementation process was influenced by a number of diverse, unofficial working groups that put forward fragmented legislative proposals.

The key implementation acts are the amendment to the Act on Air Protection (Act No. 42/2025 Coll.), effective from 1 March 2025, and the amendment to the Act on Energy (Act No. 87/2025 Coll.), effective from 1 August 2025 (Lex OZE 3). The implementing regulations were also amended: Government Regulation No. 189/2018 Coll. on the sustainability criteria for biofuels, which responds to the amendments of the Act on Air Protection, effective from 1 January 2026, Decree of the Ministry of Industry and Trade No. 110/2022 Coll., on the determination of types and parameters of supported renewable energy sources and sustainability criteria and greenhouse gases emission savings for bioliquids and biomass fuels, and Decree of the Ministry of Industry and Trade No. 166/2022 Coll., on the reporting of energy from supported sources.

A realistic outlook for the future also shows the risks to meeting the targets. The share of vehicles with alternative powertrains is not developing as expected, and achieving the goal of an 11% reduction in emissions by 2030 will therefore be very difficult. Furthermore, changes to the methodology for calculating emissions reductions, effective from 2025, are exacerbating the situation. It will also be difficult to achieve the target share of advanced biofuels. To achieve these targets, a higher share of CNG/LNG with a high proportion of biogas and a very low carbon footprint would be necessary. Nevertheless, the situation regarding biogas is currently very unclear, not only in the Czech Republic. The RFNBO target (1% e/e by 2030) already appears completely unrealistic today; and, on the other hand, limiting the share of advanced

biofuels to 1.7% e/e is unnecessarily restrictive. In 2026, ČAPPO strives to review the ramp-up curves for emission reductions and advanced biofuels - the RED III Directive does not specify these ramp-up curves; they fall under the jurisdiction of the individual member states.

Completing the implementation of RED III required considerable effort; the proposals were the subject of numerous discussions at both ministries, meetings held by the Economic Committee and the Environment Committee of the Chamber of Deputies', as well as discussions within working groups and also bilateral meetings.

Emissions allowances (ETS 2)

During 2025, ČAPPO repeatedly expressed its critical view of the implementation of EU ETS 2. Formally, the ETS 2 Directive is partially implemented using the amendment to the Act on the Conditions for Greenhouse Gas Emissions allowances Trading (Act No. 481/2024 Coll) that is effective from 1 January 2025 and the "Decree Implementing Certain Provisions of the Act on the Conditions for Trading in Greenhouse Gas Emissions allowances" (103/2025 Coll.) issued with the effectiveness from 16 April 2025. This partial implementation only addresses the provisions of the Directive which were to become effective from the beginning of 2025.

On 15 December 2025, ČAPPO sent to the Minister of Industry and Trade, the Minister of Environment and the Lady Minister of Finances a letter with its reservations concerning the implementation of ETS 2 in the sector of transport. All of the contacted persons responded. In their responses they agreed with the reservations expressed by ČAPPO and they generally noted that on 16 December 2025 the Government of the Czech Republic decided to reject the current form of the EU ETS 2 system and, at the same time, decided not to implement the relevant provisions of the amended European directive into Czech Law Order.

ČAPPO believes that it is necessary to consider very carefully whether it is useful to introduce the system of emissions allowances into transport because it is, in fact, a duplicative emissions reduction instrument alongside the Act on Air Protection, which implements the RED III Directive and creates a much more effective pressure to saving emissions in transport, also by targeting the performance of individual fuels. In the event that for whatever reasons emissions allowances are introduced into transport, the proposed system will need to be revised by both postponing the purchase and phasing-out of allowances indefinitely or for several years, i.e. not making energy more expensive until we can replace it efficiently. In addition, given the necessary predictability of the system's behaviour, it will be necessary to fix the price of an emission allowance firmly, to slow down the gradual reduction of the number of allowances issued in each year and to reconsider the horizon of their planned full phase-out in 2043. While the EU already approved some measures to mitigate the impact of ETS 2 and postponed the introduction of allowances for the transportation sector until 2028, they are still not important changes of the system.

In general, it is necessary to note again that the vast majority of proposals within the Green Deal in the field of transportation do not respect the principle of technological

neutrality and strongly prefer electromobility. Moreover, many proposals amend the directives and regulations within a short period of time after their adoption, thus making the investment and technology decisions more uncertain, and the proposals also do not take into account regional differences: most of them are mainly intended for the EU. It can be summarised that ČAPPO members, as providers of the basic form of energy for transport, are deeply interested in discussing a stable, unifying and realistic policy for the development of alternative fuels, which will accentuate the likely technical development of car drives, respect the state of the vehicle fleet and its development trends in the Czech Republic as well as the possibilities of infrastructure development. ČAPPO is interested in the preparation of a stable and achievable plan for the deployment of alternative fuels to meet legislative targets at acceptable cost both to petroleum industry and the end consumer in co-operation with all responsible authorities.

Legislation, Czech technical standards and non-legislation acts

ČAPPO, through its Council, Executive Director, Working Groups, Specialised Sections, members, and the Secretariat, developed and drafted a number of the legislative initiatives and counselled the draft laws and implementation regulations, above all from the field of petroleum, petroleum products and the environment.

On 1 July 2025, the Lobbying Act and the Act Amending Certain Laws in Connection with the Adoption of the Lobbying Act became effective. ČAPPO registered itself as a lobbyist – a legal person and it will lobby through a lobbying intermediary, Mr. J. Mikulec.

Act on Cybersecurity and its accompanying Act. Both Acts took effect on 1 November 2025. Nevertheless, the key implementation regulations to it, the "Government Regulation on Regulated Services..." and the "Government Regulation on Essential Functions of a Specified Scope", have not been issued.

While the Act on the Resilience of Critical Infrastructure Entities and on Amendments to Other Acts came into effect on 19 August 2025, the important implementation regulation, the "Government Regulation on Essential Services and Significance Criteria", has not yet been published. ČAPPO does not agree with its draft, because, in its view, operators of service stations networks with more than 200 service stations (it means Orlen, MOL and ČEPRO) should also be classified as operators of critical infrastructure. At the same time, they should be classified among the entities subject to the enhanced obligations regime pursuant to the Cybersecurity Act.

Amendment to the Decree of the Ministry of Industry and Trade No. 516/2020 on Fuel Requirements came into effect on 1 November 2025. The amendment reduces the number of required samples by half. For the case when the share of non-compliant samples grows over 1% in the given group of fuels in the period of one year, a mechanism of automatic increase in the number of collected samples has been proposed. Further, the Decree updates the monitored quality indices within the meaning of the effective technical standards for some of the fuels.

Mandatory deposits and mandatory take-back of deposit-return containers. The amendment to the Act on Packaging, prepared for a long period of time, which called, among other things, for the introduction of a mandatory deposit and take-back system for PET bottles and aluminium cans – including at gas stations with a sales area larger than 50 m² – was not debated during the previous legislative session, but it is now being debated again in virtually unchanged form as a parliamentary amendment.

The sixth EU sanctions package: Till June 2025, ČAPPO regularly sent to the Financial Analysis Office data about the quantities of products from the KN 2170 group, manufactured from petroleum from Russia.

Attention is also paid to other legislation standards that could significantly affect the activities of the member companies. The Secretariat regularly prepares their overview and sends it to the member companies. For the member companies, the Secretariat also prepares monthly summary of changes in technical standards based on the texts published in the Bulletin of the Office for Technical Standardization, Metrology and State Testing.

Regarding the non-legislation acts, it is necessary to note the co-operation with the General Financial Directorate in the area of VAT application to the cards used for fuels purchase (the case of VEGA). Discussions concerning this issue already started in 2019 and after a long pause also due to the Covid 19 pandemics, a number of detailed debates were organised early in 2024. In September 2025, the debates were successfully completed by the issuing of the “Information of the General Financial Directorate Concerning VAT Application in the Area of the Cards Used for Fuels Purchase”.

ORGANIZATION OF ČAPPO

Membership

As of 31 December 2025, the Association had 10 regular members. In 2025, five Specialised Sections worked within ČAPPO:

- Alternative Fuels
- LPG
- Operation of Service Stations
- Motor Fuels Transportation
- Oil Processing, Production of Fuels and Lubricants

As of 31 December 2025, total number of Specialised Sections members made 13. The lists of the regular members and members of Specialised Sections are attached.

The General Meetings

The Annual General Meeting was held on 25 June 2025. It debated and adopted the Annual Report of ČAPPO for the year 2024, closing of books and the economic result for the year 2024, the Report of the Council about the Activities of ČAPPO in the period after the regular meeting in December 2024. Further, the General Meeting elected ČAPPO Council for a two-year term beginning from June 2025 consisting of

AGROFERT a.s., ČEPRO, a.s., MOL Česká republika, s.r.o., ORLEN Unipetrol RPA s.r.o. a Shell Czech Republic a.s. Subsequently, the Council elected ČEPRO, a.s. its Chairman and ORLEN Unipetrol RPA s.r.o. its vice-Chairman.

The regular General Meeting was held on 10 December 2025. The General Meeting debated and adopted the Report of the Council about the Activities of the Association since the Annual General Meeting in June 2025 and further information of the members of the Council from the individual areas of ČAPPO activities under their powers. It also debated the Report on the Keeping of the Budget as at 30 November 2025, draft of the budget and the amount of the membership fees and fees of the specialised sections for the year 2026 and adopted them. Further, members of the Working Group focused on the audit of accounting in 2025 were approved.

The Council

In the year 2025, the Council held seven regular meetings during which it debated the development of proposals from the Fit for 55 package, current problems of the legislation, the activities of the Working Groups, Specialised Sections and the Secretariat. Much attention was also paid to information from the FuelsEurope Association and to the activities of ČAPPO in the media.

The Working Groups

In 2025, the Working Group Safety met on 30 January 2025 and 18 September 2025. The main part of the meetings focused on the issue of safety at service stations, in particular the prevention of the risky situations, processes for the response to emergency events and sharing of practical experience. Further, the members of the working group discussed the requirements of legislation and current standards, in particular standard No. 010/2024 – Safety requirements and procedures for service stations maintenance. Attention was given to its application in practice and the necessity to standardise the processes of the individual companies.

At its meeting on 28 May 2025, the Working Group Legislation and Ethics occupied itself with the monitoring of the legislation and selected decisions of the courts. In particular, the debate focused on:

- Implementation of the RED III Directive in transport;
- Conditions for the emissions allowances trading;
- Mandatory return deposits and take-back containers;
- Draft of the Act on Cybersecurity and connected accompanying Act;
- Draft of the Act on Lobbying and related amendment Act;
- Information from the Ministry of Finance concerning the draft amendment to the Act on Accounting (ST 783);
- Amendment to the Decree of the Ministry of Industry and Trade No. 516/2020 Coll. on Requirements for Fuels.

Further, the Working Group Legislation and Ethics occupied itself during its meeting on 12 August 2025 with the issue of lobbying regulation in connection with ČAPPO.

The Working Group Taxes and Finances met on 23 October 2025. At the meeting, it occupied itself with current development in relation to the directive concerning energy products taxation. Further, it discussed current development related to the amendment to the Act on Accounting, EU Directive on the Carbon Border Adjustment Mechanism (CBAM), the regulation on deforestation, the transposition of the EU Energy Performance of Buildings Directive (EPBD) into national law, and the latest developments from the Customs Administration of the Czech Republic.

The ad hoc working group Electromobility met on 10 November 2025 to address issues related to the development of electromobility in a coordinated manner from the perspective of the operators of service stations. During the meeting, the group focused on key pillars that require further discussion and elaboration. These include, in particular: construction standards, energy and power management, communication regarding public charging infrastructure at service stations and the product offering, including customer experience.

Specialised Sections

The Specialised Section Alternative Fuels met on 18 March 2025 and dealt with the progress of implementation of the RED III Directive and other regulations within the Fit for 55 package and, furthermore, with the outlook of the development of alternative drives.

Specialised Section Fuels Transportation met on 23 April 2025. Its main themes were current changes in the legislation, emission targets and emissions allowances. The next part of the meeting focused on the condition of the vehicle fleet in the Czech Republic, pilot operation of the automated checks at the entrance into the Cerekvice warehouse and statistical data from the checks, including the most frequently addressed defects.

Secretariat

The Secretariat properly dealt with daily clerical work, organised all the Association's events and prepared materials for them. Further, it prepared or coordinated the preparation of opinions concerning a number of both legislative and non-legislative proposals. The Executive Director participated in many negotiations with governmental bodies and other institutions and was active in the specialised working groups of the Ministry of Transport (MD), the Ministry of Finance (MF), the Ministry of Industry and Trade (MPO), the Ministry of Agriculture (MZe), the Ministry of Environment (MŽP), the Administration of State Material Reserves (SSHR), the General Customs Directorate (GŘC), and the Czech Statistical Office (ČSÚ). He is also a member of the committee of the National Emergency Sharing Organisation (NESO).

The Secretariat prepares various information materials for the member companies, including the monthly overview of ČAPPO's activities and the regular overview of the development in the field of the legislation. Usually with a monthly periodicity it also prepares and distributes among the member companies a number of

data source documents, in particular the survey of the sales at the service stations of ČAPPO member companies, the development of the motor fuels market according to the data of the Czech Statistical Office and the General Customs Directorate, the summary of the results of the checks of motor fuels quality (the Czech Trade Inspection), the comparison of the prices of petrol and diesel oil at the service stations in the Czech Republic and neighbouring countries, or of the development of the vehicle fleet in the Czech Republic.

In addition, the Secretariat collects and distributes to the member companies and working groups various technical and legislative information issued by the international petroleum industry association FuelsEurope and processes other information from Czech and foreign sources.

The Association also supplied, mainly on request, information and data to the state authorities, institutions, foreign petroleum industry associations, and specialists' community, as well as interns and students.

CO-OPERATION AND CONTACTS OF ČAPPO

Governmental Bodies

Through the Council and its members, the Secretariat and the Working Groups, ČAPPO maintained close contacts and co-operated, in particular, with the following governmental bodies:

- The Ministry of Industry and Trade (MPO), the division / department of gas industry and liquid fuels: Intensive co-operation in the preparation of the implementation of the RED II Directive; further, the co-operation also focused on the preparation of the National Plan of the Czech Republic in the field of energy and climate and the update of the National Action Plan Clean Mobility. The questions of tolerance of potential deviations in motor fuels quality and the details of some investigations were also debated. ČAPPO also participated in the activity of the working groups of the Ministry of Industry and Trade for the synthetic fuels and for the motor fuels standardization.

Within the project of the Technological Agency of the CR (TAČR) and the University of Chemistry and Technology (VŠCHT) "Optimum Use of Renewable Energy Sources in Transport", ČAPPO closely co-operated with the division of the strategy and international co-operation in the field of energetics. Further, ČAPPO expressed its positions concerning some of the legislative drafts through the ministry.

- The Ministry of Finance (MF) – the General Customs Directorate (GŘC), and the General Financial Directorate (GŘF): In particular, the Working Group for Taxes and Finances co-operated with these institutions, mainly in the solution of current technical and legislative issues connected with the problems of the Excise Tax Act, the Value Added Tax and their amendments.
- The Ministry of Environment (MŽP) – the division of air protection: Throughout the year, a number of discussions took place in connection with the preparation for the implementation of the RED III Directive. Nevertheless, the parties did not always

agree. Co-operation in the legislative area is ongoing, especially in amendments to the Act on Air Protection and the governmental Decree on Sustainability Criteria for Biofuels.

- The Administration of State Material Reserves (SSHR): Some of the member companies and the Executive Director of ČAPPO are members of the committee of the National Emergency Sharing Organization (NESO).
- The Czech Statistical Office (ČSÚ): ČAPPO uses monthly statement Petroleum and Petroleum Products. Unusual differences in various market development statistics are consulted as necessary.
- The Czech Office for Standards, Metrology, and Testing: The representatives of some of the member companies took part in the meetings of the technical standards commission Petroleum and Petroleum Products (TNK 118).

OTHER CONTACTS AND DOMESTIC CO-OPERATION

ČAPPO co-operates as necessary and with variable intensity in relation to a number of professional or legislative issues with a number of institutions, companies, associations and unions, including, but not limited to the Economic Chamber of the Czech Republic, the Association of Chemical Industry of the CR, the Confederation of Industry and Transport of the CR, the Czech Gas Association, the Association of Car Importers, the Association of the Automotive Industry, the Association of Automobile Carriers ČESMAD BOHEMIA, the Association of Biodiesel Producers, CZ Biom, the University of Chemistry and Technology Prague (VŠCHT), the Research Institute of Agricultural Technology, ŠKODA AUTO, ČEZ, the Transport Research Centre.

INTERNATIONAL CO-OPERATION

Also in the year 2025, there was very intensive and mutual exchange of information with the organization FuelsEurope, in particular concerning the issues of the future of the fuels industry till the horizon of 2050. A representative of ČAPPO regularly and actively took part in a number of the meetings, and regularly informed ČAPPO Council and the Working Group for public relations about them. Some of the documents of FuelsEurope were translated into Czech and published on ČAPPO website. ČAPPO also joined the media campaign of FuelsEurope “Clean Fuels for All”.

LIST OF ATTACHMENTS

ČAPPO Council as at 31 December 2025

List of ČAPPO members as at 31 December 2025

ČAPPO Working Groups, Specialised Sections and Secretariat as at 31 December 2025

COUNCIL OF THE CZECH ASSOCIATION OF PETROLEUM INDUSTRY AND TRADE (ČAPPO) AT DECEMBER 31, 2025

Chairman:

ČEPRO, a.s.

Jan Duspěva

Vice-chairman:

ORLEN Unipetrol RPA s.r.o.

Zbigniew Pawlucki

Members:

AGROFERT, a.s.

Martin Kubů

MOL Česká republika, s.r.o.

Ľuboš Dinka

Shell Czech republic, a.s.

Daniel Vagaský

MEMBERS OF THE ČAPPO AT DECEMBER 31, 2025

AGROFERT, a.s.^{1, 3}

Pyšelská 2327/2

149 00 Praha 4

ČEPRO, a.s.^{1, 3, 4, 5}

Dělnická 213/12

170 04 Praha 7

MERO ČR, a.s.

Veltruská 748

278 01 Kralupy nad Vltavou

MOL Česká republika, s.r.o.^{1, 2, 3, 4, 5}

Purkyňova 2121/3

110 00 Praha 1

OMV Česká republika, s.r.o.^{1, 3, 4, 5}

Štětkova 1638/18

140 00 Praha 4

ORLEN Unipetrol RPA s.r.o.^{1, 2, 3, 5}

Záluží 1

436 70 Litvínov

Shell Czech Republic a.s.^{1, 2, 3, 4}

Antala Staška 2027/77

140 00 Praha 4

TotalEnergies Marketing

Česká republika s.r.o.^{1, 3}

Rohanské nábřeží 678/29

186 00 Praha 8

UNICODE SYSTEMS, s.r.o.

Průmyslová zóna 161

674 01 Třebíč

W.A.G. payment solutions, a.s.^{1, 2, 3, 4, 5}

Na Vítězné pláni 1719/4

140 00 Praha 4

¹ Simultaneously, a member of the Alternative Fuels (Alternativní paliva) Section

² Simultaneously, a member of the LPG Section

³ Simultaneously, a member of the Service Stations Operation (Provozování čerpacích stanic) Section

⁴ Simultaneously, a member of the Motor Fuels Transport (Přeprava pohonných hmot) Section

⁵ Simultaneously, a member of the Oil Processing, Motor Fuels and Lubricants Production (Zpracování ropy, výroba paliv a maziv) Section

PERMANENT WORKING GROUPS OF THE CZECH ASSOCIATION OF PETROLEUM INDUSTRY AND TRADE (ČAPPO) AT DECEMBER 31, 2025

Safety (Bezpečnost)

Head: Ing. Zdeněk Stejskal (ČEPRO, a.s.)

Taxes (Daně)

Head: currently vacant

Legislation and Ethics (Legislativa a etika)

Head: Mgr. Pavel Císař (ČEPRO, a.s.)

Motor Fuels (Paliva)

Head: Ing. Jan Mikulec, CSc./Ing. Václav Loula (ČAPPO)

PR (Public Relation)

Head: Ing. Martin Kubů (AGROFERT, a.s.)

SPECIALIZED SECTIONS AT DECEMBER 31, 2025

ABS Bonifer Czech, s.r.o. ⁴

K Hájům 946/10
155 00 Praha 5

AXIGON a.s. ³

Výtvarná 1023/4
161 00 Praha 6

CCS Česká společnost pro platební karty s.r.o. ³

Voctářova 2500/20a
180 00 Praha 8

Enilive Austria GmbH, odštěpný závod Praha ⁵

Klimentská 1216/46

HUNSGAS s.r.o. ²

Franzova 830/125
614 00 Brno

Klaccka s.r.o. ⁴

Kozomín 503
277 45 Úžice

KM-PRONA, a.s. ^{1,3}

463 55 Rynoltice 215

KRALUPOL a.s. ^{1,2,4}

Jandova 10/3
190 00 Praha 9

PARAMO, a.s. ⁵

Přerovská 560
530 06 Pardubice

PETROTRANS, s.r.o. ⁴

Střelničná 2221/50
182 00 Praha 8

SGS Czech Republic s.r.o. ³

K Hájům 2671/8
155 00 Praha 5

TOMEGAS s.r.o. ²

Táborská 260
399 01 Milevsko

TSG, s.r.o. ³

Nad Vršovskou horou 88/4
101 00 Praha 10

¹ member of the section Alternative fuels (Alternativní paliva)

² member of the section LPG

³ member of the section Service stations operations (Provozování čerpacích stanic)

⁴ member of the section Motor fuels transportation (Přeprava pohonných hmot)

⁵ member of the section Oil processing, motor fuels and lubricants production (Zpracování ropy, výroba paliv a maziv)

SECRETARIAT OF THE ČAPPO

Executive Director

Phone:

E-mail:

Technical Spokesman

Phone:

E-mail:

Assistant

Phone:

E-mail:

Web:

Address:

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Rubeška 393/7, 190 00 Praha 9 – Vysočany

ABBREVIATIONS

AdBlue	High-purity aqueous solution of synthetic urea, used as an additive for selective catalytic reduction technology to achieve emission savings of diesel engines according to EURO IV standards and higher
CNG	Compressed natural gas
ČOI	Česká obchodní inspekce (Czech Trade Inspection)
ČS	Service station
ČSN	Česká technická norma (Czech Technical Standard)
ČSÚ	Český statistický úřad (Czech Statistical Office)
ČPS	Český plynárenský svaz (Czech Gas Association)
ETBE	Ethyl tertiary butyl ether
FAME	Fatty acids methyl esters
FAÚ	Finančně analytický úřad (Financial Analytical Office)
FuelsEurope	an interest organization of petroleum companies, representing their interests in relation to the EU institutions
GFR	Generální finanční ředitelství (General Financial Directorate)
GŘC	Generální ředitelství cel (General Customs Directorate)
HVO	Hydrotreated vegetable oil (paraffinic diesel fuel)
Intrastat	Statistical system of data collection and processing, monitoring the trade in goods among the members of the European Union
LNG	Liquefied natural gas
LPG	Liquefied petroleum gas
LUV	Light commercial vehicles
MD	Ministerstvo dopravy (Ministry of Transport)
MEŘO	Rape seed oil methylesters
MF	Ministerstvo financí (Ministry of Finance)
MPO	Ministerstvo průmyslu a obchodu (Ministry of Industry and Trade)
MZe	Ministerstvo zemědělství (Ministry of Agriculture)
MŽP	Ministerstvo životního prostředí (Ministry of Environment)
NAP	Národní akční plán (National Action Plan)
NESO	Národní organizace pro společný postup ve stavu ropné nouze (National Emergency Sharing Organisation)
OA	Passenger cars
OTE	Market operator
OS	Specialised sections
OZE	Renewable energy sources
PHM	Motor fuels
POZE	Supported energy sources

PS.....Working group

PSP ČRPoslanecká sněmovna Parlamentu ČR (Chamber of Deputies of the Parliament of the Czech Republic)

RED III.....Renewable Energy Directive (directive to support the use of energy from the renewable sources)

ŘSD.....Ředitelství silnic a dálnic ČR (Roads and Highways Directorate of the CR)

SSHRSpráva státních hmotných rezerv (Administration of State Material Reserves)

TAČR.....Technologická agentura ČR (Technological Agency of the CR)

TNKTechnická normalizační komise (Technical Standardization Commission)

VŠCHTVysoká škola chemicko-technologická v Praze (University of Chemistry and Technology Prague)