

# Outlook

## Retail Segment

### Fuel

#### New stations

ADNOC Distribution exceeded its upgraded guidance to add 90-100 stations to its network in 2025 by launching 20 stations and contracting 99 new stations in KSA. The Company targets to add 60-70 stations in 2026 across the three markets of its operations. The Company remains on track to achieve its target to reach 1,150 service stations by 2028.

#### Saudi Arabia

With a fully operational team on the ground, ADNOC Distribution accelerated growth on a large and dynamic KSA market by contracting 129 stations under a DOCO model (30 stations in 2024 and 99 stations in 2025). At the end of December 2025, 31 DOCO stations were operational under ADNOC Distribution brand following the upgrades.



#### Egypt

ADNOC Distribution's acquisition of a 50% stake in TotalEnergies Marketing Egypt in 2023 reaffirmed the Company's commitment to expanding business in attractive international growth markets. Egypt's retail fuel, lubricants and aviation markets are highly attractive with a potential for future growth.

Following an upgrade, twelve service stations operate under ADNOC Distribution brand.

The Company started blending ADNOC Voyager lubricants in Egypt in 2024, with the intention of making the country a regional export hub.

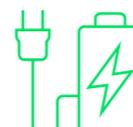
### EV Charging

ADNOC Distribution remains committed to future-proofing its business through the disciplined and profitable rollout of fast and super-fast EV charging infrastructure.

Chargers are being deployed across the Company's service stations and dedicated mobility hubs at strategic locations throughout the UAE. This rollout is designed to meet current EV charging demand while enhancing the overall customer value proposition. Deployment is calibrated quarterly, based on actual EV uptake and supported by best-in-class technology.

The Company has made significant progress in expanding its EV charging network as part of its broader strategy to address the growing demand for electric mobility solutions. As of the end of 2025, ADNOC Distribution had 402 EV charging points, an increase of 1.8x or 182 charging points compared to the end of 2024, above guidance. This includes 60 EV charging points at the region's largest EV Hub which was launched on a key highway connecting Abu Dhabi and Dubai. The network includes both fast and super-fast charging options, strategically covering key highways and urban centers.

ADNOC Distribution aims to further increase its network by 50-60 EV charging points by the end of 2026, cementing its position as a leader in the growing On-the-Go EV charging market.



### Non-fuel

Aligned with its growth strategy, ADNOC Distribution is reallocating capital towards enhancing convenience and mobility offerings. The Company continues to invest in delivering a modern, engaging retail experience, transforming its service stations into destinations of choice.

The ongoing convenience store revitalization program and introduction of the refreshed Oasis by ADNOC brand are enabling ADNOC Distribution to capture the benefits of its customer-centric initiatives, supporting consistent growth in the convenience retail segment.

Enhancements include a modernized store environment and repositioning the convenience retail offer around a "On-The-Gourmet" proposition with upgraded food, beverage and barista-crafted coffee offerings, reinforcing a consistent, higher-quality customer experience across the network.

After launching six new flagship retail destinations under The Hub by ADNOC brand in 2025, ADNOC Distribution plans to launch five new hubs in 2026 and have 30 sites by 2030.

