



Best Practices for Petroleum Wholesalers

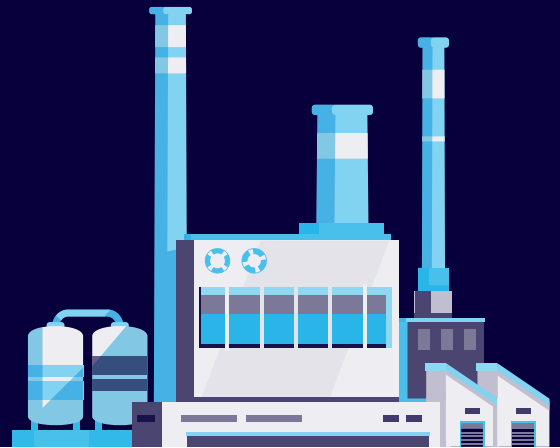
A guide with the latest trends, best practices,
and resources from PDI Technologies

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Is Your Business Positioned to Compete?

To thrive in the increasingly dynamic petroleum wholesale market, you need the right mix of business strategy, human expertise, and digital transformation. Breaking down functional barriers, improving value chain visibility, and streamlining processes are just a few of the key tactics that can help separate your business from the competition.



Top 5 Challenges for Petroleum Wholesalers



Supply chain visibility

A lack of streamlined communication hampers transparency across supply chains, making it harder to manage disruptions caused by geopolitical tensions and regulatory changes.



Advanced logistics management

Without automated scheduling and real-time delivery updates, it's difficult to adjust to unplanned events—making it harder to optimize your transportation networks.



Operational inefficiencies

Human error and manual processes in your dispatch and delivery systems can add costs and reduce profitability, limiting sustainable growth.



Lack of integrated systems

Siloed systems across pricing, compliance, and inventory lead to delayed decisions and missed opportunities.



Gaps in real-time reporting and analytics

Without timely insights to help you navigate industry changes, you face limits in agility, pricing optimization, and overall competitiveness.

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Businesses adopting advanced IT solutions have reported up to a 20% increase in operational efficiency and a 15% reduction in logistics costs.

- Deloitte

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4 Best Practices to Improve Your Bottom Line

Petroleum marketing in the US includes nearly **2,000 companies, with the top 50 accounting for 87% of industry revenue.**

To succeed, you must be able to scale your operations and build robust relationships that drive both resilience and growth.

To stay at the top of the industry, you need to build a strong operational and technological foundation that allows you to continually refine your operations.

Innovation in Action

[Flyers Energy](#) implemented a wholesale solution that centralizes its complex petroleum marketing operations into a unified system,

saving over \$350,000 annually

Here Are Four Key Areas Where You Should Focus

1 Maximize Operational Efficiency

- ▶ Leading companies invest in modern technologies to streamline their operations, reduce costs, and improve decision making.
- ▶ Automating areas like invoicing, compliance reporting, and inventory tracking can help you reduce overhead costs.

2 Strengthen Supply Chain Resilience

- ▶ Top wholesalers build partnerships with domestic crude and biofuel suppliers to reduce their dependence on volatile international markets.
- ▶ Investing in logistics technology, such as GPS tracking and route optimization tools, can help you avoid transportation delays.

3 Focus on Customer-Centric Solutions

- ▶ Industry leaders implement reliable Customer Relationship Management (CRM) programs that enhance customer relationships while promoting loyalty and retention.
- ▶ Providing transparent pricing models and seamless digital ordering platforms is a standard industry practice that your customers and partners expect.

4 Diversify into Renewable Fuels

- ▶ Forward-thinking companies are expanding renewable fuel production to align with environmental goals and capture new market opportunities.
- ▶ Consider placing a greater focus on biofuels (such as renewable diesel), which are projected to grow at a CAGR of 7% through 2030 (per Grand View Research).

4 Smart Ways to Leverage New Technology

A key challenge for all sizes of petroleum wholesalers is a lingering reliance on legacy IT systems and siloed applications to manage critical operations such as inventory tracking, fuel pricing, and distribution logistics.

You can overcome this issue by transforming your IT infrastructure with modern digital solutions.



1 Advanced analytics

- AI and machine learning models support dynamic pricing, where you can make real-time adjustments based on market trends to deliver more competitive pricing.
- These models also enable proactive demand forecasting with predictive analytics that help you optimize inventory levels and reduce holding costs.

2 IoT devices

- IoT-enabled sensors, such as automatic tank gauges, can monitor fuel quality and storage conditions in real time, reducing losses due to waste or theft.
- GPS and telematics solutions streamline fleet management and improve delivery efficiency.

3 Cloud-based ERP systems

- Cloud solutions provide a centralized platform for managing procurement, inventory, distribution, and compliance—internally and across your supply chain.
- Over 90% of medium to large businesses rely on Enterprise Resource Planning (ERP) software to integrate processes and support sustainable growth.

4 Data-driven decision making

- Integrating multiple data sources for comprehensive analysis can lead to new revenue streams and partnerships.
- Data insights help you make faster, more informed decisions—potentially revealing cross-industry partnerships and new business opportunities.

Innovation in Action

[Pilot Flying J](#) combined smart IoT sensors in fuel trucks with AI-driven analytics to optimize delivery routes, resulting in:



15%

less fuel waste



20%

shorter delivery times



\$2M

in annual savings

Transform Faster with the Right ERP Solution

Your ERP system should serve as the backbone for adopting advanced analytics, supporting IoT-driven operations, utilizing cloud-based infrastructure, and ensuring seamless data integration. At a minimum, your ERP solution should help you in the following key areas.



Centralize data and analytics

Advanced analytics tools provide real-time visibility into key performance metrics such as fuel consumption, delivery volumes, customer demand patterns, and fleet performance. Leverage these analytics to optimize resource allocation, reduce inventory stockouts, and maximize sales.



Optimize operational efficiency

The back-end financial reporting suite of an ERP system can help you automate processes ranging from order management to financial reconciliation. It can also help you avoid inaccurate data resulting from human error and manual processes.



Simplify regulatory compliance

Reducing the burden of tax adherence and environmental compliance reporting is essential to protecting your business and staying ahead of regulatory standards.



Improve supply chain monitoring

You should be able to integrate supplier data with your warehouse and logistics data for real-time reconciliation, an approach that allows you to scale your operations efficiently without adding overhead.



Manage pricing to increase profitability

Thriving in today's dynamic market requires agile pricing—leveraging real-time data and smart predictions to forecast demand and adjust prices. Automating supplier cost updates helps ensure accuracy so you can pass on pricing fluctuations in a fair manner.

Innovation in Action

The [MAPCO](#) fuel and c-store chain integrated its back-office and POS systems to improve dispatch, order forecasting, cost reconciliations, and analytics for its fuel delivery operations.

By modernizing its ERP solution, MAPCO enhanced its customer management capabilities, streamlined its operations, and improved inventory management with robust forecasting tools.

4 Must-Have Elements for Your ERP System



1 Modularity and Integration

- An ERP system's modularity and ability to integrate features with existing processes helps ensure operational visibility while supporting feature customization and scaling.
- Automating processes like back-order management and electronic billing can help you enhance efficiency, streamline operations, and reduce pressure on your account teams.

2 Reporting and Analytics

- ERP systems provide in-depth financial reports, real-time insights, and customer activity tracking.
- Features like electronic tax filing, mobile logistics, inventory reconciliation, and access to intra-day POS data can help you increase productivity and adapt new strategies faster.

3 IoT and Device Integration

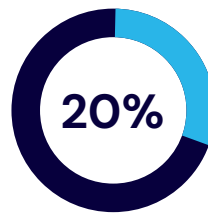
- ERP systems integrated with mobile warehouse scanning tools allow fast inventory counts, monitor overstock and out-of-stock situations, and streamline warehouse operations.
- IoT integration enables proactive reporting of card lock sites and fuel depots, improving operational efficiency and real-time monitoring.

4 End-to-End Process Automation

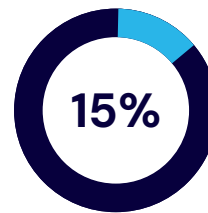
- A modern ERP system helps you automate key functions like real-time order tracking, bill-of-lading reconciliation, and e-billing.
- These features reduce manual effort, improve accuracy, and accelerate payment cycles while freeing you up to focus on strategic goals.

Innovation in Action

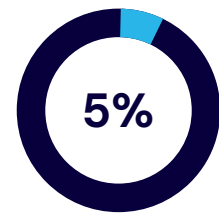
[7-Eleven](#) adopted a cloud-based ERP system to centralize inventory tracking and pricing management. Integrating real-time data from retail locations, suppliers, and distribution centers has resulted in:



reduction in fuel stockouts



lower inventory costs



increase in margins

Align Your ERP and CRM Systems

Your ERP system should work in conjunction with your CRM solutions to streamline pricing, credit handling, and communications.

It should also include web portals so your customers can access their account details, balances, invoices, and payment status—increasing engagement and strengthening your relationships. However, two areas of ERP and CRM alignment are especially critical for success.



Supply chain monitoring

- Tighter alignment between your ERP and logistics systems allows you to synchronize supplier data with warehouse and transportation data.
- Powerful logistics tools can optimize your delivery schedules and track shipments in real time, reducing delays and increasing transparency across your supply chain.

Card processing capabilities

- ERP systems manage proprietary and network cards, automating payments for network cards across all your relationships.
- Integration with your POS system can enable real-time tracking, accurate fuel and tank readings, proactive reporting at unmanned depots, and seamless transactions for commercial fleets.

Propane and Commercial Fueling Solutions

Want to streamline your home heat and propane business operations?

You can reduce costs and improve the customer experience starting on day one with the right propane and commercial fueling ecosystem. Increase your productivity by accessing real-time information to make more informed decisions and become a leader in your market. [Learn how.](#)

How are you managing...

- Frequent price fluctuations
- Supply chain disruptions
- The ability to grow without adding overhead
- The lack of full visibility over your entire business

Secure Your Spot in the Energy Evolution

The petroleum wholesale industry is at a pivotal moment, driven by technological breakthroughs, evolving energy policies, and shifting expectations.

To succeed against growing competition, you must transform your value chains, optimize your operations, and leverage the latest technology innovations—especially your ERP system.

Embracing a smart strategy for digital modernization, you can position your business to become much stronger, resilient, and future-ready today for whatever comes next.

Learn more at



pditechnologies.com



About PDI Technologies

With 40 years of industry leadership, PDI Technologies, Inc. resides at the intersection of productivity and sales growth, delivering powerful solutions that serve as the backbone of the convenience retail and petroleum wholesale ecosystem. By “Connecting Convenience” across the globe, we empower businesses to increase productivity, make informed decisions, and engage faster with their customers.

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