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NACS Global Convenience Store Industry Report

Q2 2025

YOUR QUARTERLY PULSE
ON GLOBAL TRENDS

NIQ

Including exclusive
NIQ syndicated data

Q2
25

Across the globe, convenience stores serve more customers than any other channel. Convenience stores are the heartbeat of communities around the world, and they are also the pulse of economic activity within specific countries and regions. In times of economic uncertainty, convenience stores also can be a predictor of the broader economic climate.

Our Global Convenience Store Industry Reports, developed in partnership with NIQ, provide quarterly snapshots of sales and trends from dozens of countries around the world. In an increasingly global market, trends can quickly spread around the globe, whether micro trends related to specific products or macro trends related to overall sales and consumer spending. In an interconnected global economy, these quarterly reports go beyond what is happening within a specific country's economy; these numbers also can provide signals about shifts in the market.

This report provides a centralized overview of some of the top trends in convenience retailing that are already redefining markets in 2025. We'll be carefully examining additional sales data over the coming months to determine which shifts are temporary market adjustments and which prove to be long-term, sustainable trends.

For more than 60 years, NACS has delivered industry-best data that captures existing market conditions and potential opportunities for retailers and suppliers. To do that we partner with world-class organizations like NIQ that deliver unique data and insights that uncover what they could mean in your market and in markets around the world.

Those who focus on leveraging their strengths to give customers what they want—or don't yet know that they want—are the ones most likely to find success in 2025 and beyond.



Henry O. Armour
President & CEO
NACS

Dear NACS members,

The second quarter of 2025 showcased a rapidly evolving convenience retail landscape, shaped by persistent inflation, shifting consumer preferences and localized regulatory changes. Across 33 countries, retailers responded with agility—tailoring strategies to meet market demands, optimizing promotions and driving innovation within key categories. Notably, 20 countries reported improved value growth in Q2, doubling the number from the previous quarter. The NIQ-NACS Q2 2025 Global Convenience Store Report provides a comprehensive overview of these developments, highlighting the trends and tactics fueling growth across the global convenience sector.

Key highlights from the Q2 report include:

- **Regional Growth Drivers:** Argentina led global value growth with a +31.5% increase driven by inflation. Peru delivered the highest unit growth globally (+15.1%) due to rapid store expansion. The Philippines saw +11.9% value growth, supported by strong demand and promotions. Colombia's +15.2% value growth was fueled by private label gains and core basket categories like coffee and tobacco.
- **Promotions and Shopper Missions:** Retailers used targeted promotions to drive traffic and support evolving shopper needs. In Canada, promotional support increased by 10%, contributing to a 10.3% rise in convenience store dollar sales excluding tobacco, which was three times the growth rate of the remaining market. In Europe, growth was modest, but promotions in soft drinks, frozen food, snacks and perishables helped attract shoppers with broader missions like “dinner for tonight.” These categories now represent 45% of convenience store sales and supported incremental spending despite flat unit growth and declining tobacco sales.
- **Category Evolution:** Asia-Pacific saw explosive growth in niche wellness and personal care categories. Thailand's hair tonic category surged by 680%, while Hong Kong's skin care segment rose nearly 88%. In Canada, liquor sales jumped over 300% following expanded retail access due to regulatory changes, with wine and beer also posting strong gains. These shifts underscore the importance of localized assortment strategies and responsiveness to regulatory change.

As we move into the second half of 2025, convenience stores continue to prove their resilience and relevance within the local markets they serve. This quarter's findings reinforce the importance of agility, strategic adaptation and category innovation. We invite you to explore the full report and connect with us as we continue to deliver insights that help you navigate change and seize opportunity.

Best regards,



James Hunt
Managing Director - Commercial
NIQ

NIQ

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Market Overview

Convenience Store Growth Rankings Overview

In Q2 2025, all but six of the 33 NIQ-measured countries included in this report experienced gains in convenience store value sales versus Q2 2024. Of the countries with gains, four experienced double-digit growth in Q2 2025. Among those with double-digit growth, three were in Latin America (Argentina, Peru and Colombia) and one in the Asia-Pacific (Philippines) region. There were 20 countries (up from 10) with improved value growth in Q2 2025 versus the prior quarter and 13 countries with lower growth.

NOMINAL LOCAL CURRENCY VALUE % GROWTH VS. YEAR-AGO RANKINGS

	Q1 '25	Q2 '25	
Argentina	44.3%	31.5%	↓
Peru	13.1%	18.9%	↑
Colombia	13.7%	15.2%	↑
Philippines	10.7%	11.9%	↑
Brazil	12.3%	9.5%	↓
Chile	4.6%	7.6%	↑
France	4.8%	7.3%	↑
Belgium	3.8%	6.2%	↑
Ireland	1.6%	5.1%	↑
Uruguay	9.0%	4.8%	↓
Panama	3.5%	4.2%	↑
South Korea	5.1%	3.9%	↓
Taiwan	0.9%	3.3%	↑
Netherlands	6.3%	3.1%	↓
Mexico	4.6%	2.9%	↓
Vietnam	3.3%	2.8%	↓
Italy	-3.8%	2.8%	↑

	Q1 '25	Q2 '25	
Spain	1.4%	2.6%	↑
Great Britain	0.5%	2.6%	↑
Malaysia	3.9%	2.4%	↓
Portugal	-1.5%	2.4%	↑
Austria	2.5%	2.3%	↓
Norway	0.4%	2.1%	↑
Hong Kong	-0.4%	1.5%	↑
Thailand	3.2%	1.4%	↓
China	1.0%	1.2%	↑
Canada	-0.8%	0.4%	↑
United States	-0.1%	-0.1%	↓
Sweden	2.9%	-0.2%	↓
Denmark	-2.1%	-1.5%	↑
Indonesia	5.5%	-3.7%	↓
Singapore	-7.2%	-4.5%	↑
Costa Rica	-5.6%	-5.1%	↑

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

More/less growth compared to the previous quarter ↑↓

Convenience Store Performance Highlights: **North America**

Canada

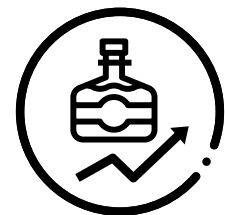
In Q2 2025, Canada saw mixed convenience store performance versus the remaining market.

Convenience store dollar sales grew by just 0.4% while dollar sales for the remaining market experienced a 3.3% gain. Conversely, convenience store unit sales grew 2.2% versus a gain of only 0.4% for the remaining market. Continued declines in convenience store tobacco product sales were a factor, but September 2024 legislation from the Ontario government allowing sales of alcoholic beverages in convenience stores continued to provide a boost in 2025. Excluding tobacco products, convenience store dollar sales increased three times the rate of the remaining market (+10.3% versus +3.4%) and the gap in unit sales performance narrowed (convenience store units grew just 0.1% or very similar to the 0.5% gain for the remaining market). Convenience store promotion support grew 10% while support fell 0.6% for the remaining market. However, the disparity in promotion support between convenience stores and the remaining market continued as 37.6% of units were sold on a promotion in convenience stores versus 51.7% for the remaining market.

Growth rates for the top five fastest-growing categories in Q2 2025 ranged from a high of +310% for liquor to a low of +6.4% for alternative snacks. There was healthy growth in dollar sales for wine (+80%) and beer (+49.8%)

Three categories on the top five “what’s not” category list for the quarter (health & beauty care, commissary & other packaged products and packaged bread) were also on the list for the prior quarter. All five categories on the list this quarter experienced near- or double-digit declines in dollar sales.

**SALES BOOST FROM THE EXPANSION OF
ONTARIO ALCOHOLIC BEVERAGE SALES
IN THE FOURTH QUARTER OF 2024
CONTINUED INTO 2025 WITH Q2 2025
VALUE GAINS FOR LIQUOR (+310.0%),
WINE (+80.0%) AND BEER (+49.8%).**



What's Hot/Not for Canada based on categories CAN\$1MM+

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS CANADA

Canada Q2	C-store	Remaining market
Sales Canadian dollars	\$2.0 billion: +0.4% from year-ago quarter	\$27.9 billion: +3.3%
Sales (excluding Tobacco)	\$747.6 million: +10.3%	\$27.8 billion: +3.4%
Units	285.9 million: +2.2%	4.7 billion: +0.4%
Units (excluding Tobacco)	187.4 million: +0.1%	4.7 billion: +0.5%
Avg. unit price change	-1.8% (+10.2% ex-Tobacco)	+2.8% (+2.9% ex-Tobacco)
% Units on any promo	37.6%	51.7%
% Change units on any promo	+10.0%	-0.6%



What's hot?

Liquor: +310.0%
Wine: +80.0%
Beer: +49.8%
Automotive Products: +8.1%
Alternative Snacks: +6.4%



What's not?

Health & Beauty Care: **-60.3%**
Perishable Grocery: **-25.2%**
Commissary & Other Packaged Products: **-22.6%**
Packaged Bread: **-12.4%**
Frozen Food: **-9.0%**

What's Hot/Not for Canada based on categories CAN\$1MM+

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

United States

In Q2 2025, U.S. convenience store dollar and unit sales slipped 0.1% and 2.7%, respectively, while dollar sales in the remaining market increased 2.6% and unit sales grew 1.0%. Growth rates were similar with or without tobacco products for both market views. Unlike the prior year and previous quarter, inflationary pressures were more alike for convenience stores and the remaining market (+2.6% versus +1.6%). Promotion support change for both convenience stores and the remaining market were also similar (+2.1% and -0.7%, respectively), while promotional levels in convenience stores remained well below the remaining market (22.6% of convenience and 31.8% of remaining market units were sold on a promotion).

Three of the top five growth categories in Q2 2025—wine (+14%), liquor (+7.6%) and cold dispensed beverages (+4.3%)—were also on the Q1 2025 top five list. Four of the top five “what’s not” categories in Q2 2025—packaged bread (-9.3%), commissary and other packaged products (-7.6%), fluid milk products (-6.0%) and salty snacks (-3.9%)—were also on the Q1 2025 list of top declining categories.

**THREE OF THE TOP FIVE GROWTH CATEGORIES
IN Q2 2025—WINE (+14%), LIQUOR (+7.6%) AND
COLD DISPENSED BEVERAGES (+4.3%)—WERE
ALSO ON THE Q1 2025 TOP FIVE LIST.**



What's Hot/Not for the U.S. based on categories US\$1MM+

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS UNITED STATES

United States Q2	C-store	Remaining market
Sales U.S. dollars	\$50.6 billion: -0.1% from year-ago quarter	\$283.7 billion: +2.6%
Sales (excluding Tobacco)	\$34.0 billion: -0.3%	\$283.2 billion: +2.6%
Units	12.5 billion: -2.7%	63.5 billion: +1.0%
Units (excluding Tobacco)	10.2 billion: -2.4%	63.3 billion: +1.0%
Avg. unit price change	+2.6% (+2.2% ex-Tobacco)	+1.6% (+1.6% ex-Tobacco)
% Units on any promo	22.6%	31.8%
% Change units on any promo	+2.1%	-0.7%



What's hot?

Wine: +14.0%
Liquor: +7.6%
Other Tobacco Products: +5.7%
Cold Dispensed Beverages: +4.3%
Other Deli Dairy Products: +2.0%



What's not?

Packaged Bread: **-9.3%**
Commissary & Other Packaged Products: **-7.6%**
Fluid Milk Products: **-6.0%**
Ice: **-5.0%**
Salty Snacks: **-3.9%**

What's Hot/Not for the U.S. based on categories US\$1MM+

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

Convenience Store Performance Highlights: **Europe**

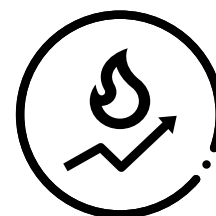
Europe

Across twelve NIQ-measured European countries included in this report, just two countries (Belgium and France) delivered better convenience store performance in both value and unit growth versus the total market in Q2 2025. Convenience store value sales growth occurred in ten of twelve countries and was the highest in France (+7.3%), followed by Belgium (+6.2%), Ireland (+5.1%), the Netherlands (+3.1%), Italy (+2.8%), Great Britain (+2.6%*), Spain (+2.6%), Portugal (+2.4%), Austria (+2.3%) and Norway (+2.1%). Value sales declined in Denmark (-1.5%) and Sweden (-0.2%).

Convenience store unit sales grew in five countries, led by France (+7.3%) and followed by Belgium (+5.7%), Spain (2.0%), Ireland (+0.9%) and Portugal (+0.7%). Unit sales declines were the greatest in Denmark (-4.2%), Sweden (-3.7%), Netherlands (-3.1%), Austria (-2.8%), Italy (-1.1%), Norway (-0.7%) and Great Britain (-0.0%).

As noted in previous reports, there was a fair amount of consistency in the high-growth categories across several countries. In Q2 2025, there were six top-growth categories in six or more countries. Non-alcoholic beverages (12 countries) topped the list, followed by confectionery & snacks (10), perishable food (10), frozen food (seven), and tobacco and health care (both with six).

IN Q2 2025, THERE WERE SIX TOP-GROWTH CATEGORIES IN SIX OR MORE COUNTRIES—NON-ALCOHOLIC BEVERAGES (12), CONFECTIONERY & SNACKS (10), PERISHABLE FOOD (10), FROZEN FOOD (SEVEN), AND TOBACCO AND HEALTH CARE (BOTH WITH SIX).



**When excluding tobacco, which accounted for about one-fifth of Great Britain's total convenience store value sales, convenience store value sales grew 4.4% in Q2 2025.*

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

WESTERN EUROPE

Convenience retailers see good growth in snacks, non-alcoholic drinks and fresh foods.

By Mike Watkins, Head of Retailer and Business Insight, NIQ

After a slow but steady start to the year, food retail sales rallied across Europe* in Q2 2025, helped by a late Easter and in many countries, some early summer hot weather in June.

Across the total industry, value sales increased 3.8% with unit sales growth of 1.3%. While the convenience channel value growth in Europe was just 1.4% with flat unit growth, this was held back by a 7% fall in tobacco sales.

The rest of the store (FMCG) had good sales growth of 3.7% with strong growth in soft drinks (+8.2%) and frozen food (+6.5%), helped by the weather, and also snacks (+6.3%) and fresh food (perishables) at +3.8%. These four super categories now account for 45% of all sales at convenience stores and are important in attracting new shoppers looking for not just immediate consumption needs but different shopping missions such as 'dinner for tonight.'

European consumers are buying little and shopping more often so visits to stores are increasing, but over 50% of shoppers are still cautious about spending with many continuing to tighten belts. Supermarkets are continuing to use promotions and loyalty card offers to drive footfall and reward shopper loyalty. In fact, promotions account for nearly 1 in 3 of all FMCG sales in Europe (all channels) with 42% of consumers prepared to buy whatever brand is on promotion (NIQ Consumer Outlook, Europe).

The implication for convenience stores is that while price perception and value for money influence overall spending, it is relevant promotions, support for events such as Easter and the weather that moves the dial on incremental spending, particularly in food and drink.

Looking ahead, we continue to see an evolution in store formats. Many convenience store retailers are extending ranges in food to go, embracing rapid delivery with third parties and some are investing in new, smaller (under 150 square meters) urban stores. Supermarkets are editing ranges and reducing space to help operational effectiveness such that their big stores are getting smaller and small stores are getting bigger.

This means that convenience retailers need to attract new shoppers with an assortment ready to serve all purchasing missions but also be match-ready to meet the challenge of the online channel that increasingly offers the 'convenience' of rapid deliveries and quick commerce.

**13 European countries included in this review*

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

Europe: Macro Trends



MACRO TRENDS AUSTRIA

Austria Q2	C-store	Total market
Sales Euros	€239.1 million: +2.3% from year-ago quarter	€5.1 billion: +5.9%
Units	95.3 million: -2.8%	2.2 billion: +1.5%



What's hot?

Confectionery & Snacks: **+9.5%**
 Perishable Food: **+6.6%**
 Tobacco: **+5.5%**
 Frozen Food: **+3.0%**
 Non-Alcoholic Beverages: **+2.6%**



What's not?

Health & Beauty Aids: **-12.3%**
 Home Care: **-9.6%**
 Pet Food: **-5.4%**
 Paper Products: **-5.0%**
 Alcoholic Beverages: **-4.9%**



MACRO TRENDS BELGIUM

Belgium Q2	C-store	Total market
Sales Euros	€232.2 million: +6.2% from year-ago quarter	€6.1 billion: +3.1%
Units	74.1 million: +5.7%	2.1 billion: +2.4%



What's hot?

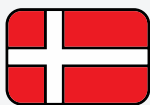
Health Care: **+37.0%**
 Non-Alcoholic Beverages: **+13.2%**
 Frozen Food: **+12.2%**
 Alcoholic Beverages: **+6.1%**
 Confectionery & Snacks: **+5.6%**



What's not?

Paper Products: **+0.1%**
 Ambient Food: **+2.1%**
 Home Care: **+3.1%**
 Tobacco: **+3.3%**
 Pet Food: **+3.8%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS DENMARK

Denmark Q2	C-store	Total market
Sales Euros	€454.0 million: -1.5% from year-ago quarter	€4.2 billion: +3.4%
Units	113.6 million: -4.2%	1.5 billion: +0.7%



What's hot?

Confectionery & Snacks: **+0.8%**
 Non-Alcoholic Beverages: **+0.1%**
 Perishable Food: **+0.1%**
 Ambient Food: **-1.2%**
 Tobacco: **-1.7%**



What's not?

Health & Beauty Aids: **-10.5%**
 Pet Products: **-9.8%**
 Home Care: **-8.5%**
 Frozen Food: **-6.9%**
 Paper Products: **-6.4%**



MACRO TRENDS FRANCE

France Q2	C-store	Total market
Sales Euros	€3.8 billion: +7.3% from year-ago quarter	€35.8 billion: +3.8%
Units	1.3 billion: +7.3%	12.5 billion: +3.2%



What's hot?

Health Care: **+34.2%**
 Frozen Food: **+17.7%**
 Non-Alcoholic Beverages: **+16.0%**
 Confectionery & Snacks: **+10.1%**
 Perishable Food: **+7.3%**



What's not?

Tobacco: **-61.3%**
 Pet Food: **-0.5%**
 Home Care: **+2.3%**
 Paper Products: **+3.0%**
 Alcoholic Beverages: **+3.1%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS GREAT BRITAIN

Great Britain Q2	C-store	Total market
Sales Euros	€12.3 billion: +2.6% : from year-ago quarter	€52.1 billion: +4.9%
Sales (excluding Tobacco)	€9.9 billion: +4.4%	€48.6 billion: +5.7%
Units	4.0 billion: -0.0%	18.8 billion: +0.8%
Units (excluding Tobacco)	3.9 billion: +0.4%	18.6 billion: +0.9%



What's hot?

Frozen Food: **+11.5%**
 Non-Alcoholic Beverages: **+11.5%**
 Health & Beauty Aids: **+8.6%**
 Confectionery & Snacks: **+5.9%**
 Perishable Food: **+2.5%**



What's not?

Tobacco: **-4.0%**
 Health Care: **-3.0%**
 Pet Food: **-2.2%**
 Home Care: **-2.1%**
 Paper Products: **-1.2%**



MACRO TRENDS IRELAND

Ireland Q2	C-store	Total market
Sales Euros	€1.1 billion: +5.1% from year-ago quarter	€3.4 billion: +5.8%
Units	295.5 million: +0.9%	1.1 billion: +1.0%



What's hot?

Frozen Food: **+14.0%**
 Non-Alcoholic Beverages: **+11.9%**
 Health Care: **+6.5%**
 Confectionery & Snacks: **+5.8%**
 Alcoholic Beverages: **+3.9%**



What's not?

Home Care: **-5.9%**
 Pet Food: **-3.8%**
 Ambient Food: **-2.2%**
 Paper Products: **-1.7%**
 Tobacco: **+2.7%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS ITALY

Italy Q2	C-store	Total market
Sales Euros	€2.1 billion: +2.8% from year-ago quarter	€25.0 billion: +4.8%
Units	1.1 billion: -1.1%	12.5 billion: +1.7%



What's hot?

Tobacco: **+49.0%**
 Confectionery & Snacks: **+21.1%**
 Non-Alcoholic Beverages: **+5.7%**
 Perishable Food: **+3.1%**
 Alcoholic Beverages: **+1.6%**



What's not?

Home Care: **-5.8%**
 Paper Products: **-3.8%**
 Pet Food: **-3.0%**
 Frozen Food: **-2.0%**
 Ambient Food: **-1.1%**



MACRO TRENDS NETHERLANDS

Netherlands Q2	C-store	Total market
Sales Euros	€810.7 million: +3.1% from year-ago quarter	€12.5 billion: +2.3%
Units	149.3 million: -3.1%	5.0 billion: +0.8%



What's hot?

Frozen Food: **+11.5%**
 Health Care: **+10.6%**
 Non-Alcoholic Beverages: **+9.4%**
 Tobacco: **+3.2%**
 Perishable Food: **+1.6%**



What's not?

Pet Food: **-20.2%**
 Home Care: **-14.8%**
 Paper Products: **-8.7%**
 Ambient Food: **-8.0%**
 Health & Beauty Aids: **-7.4%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS NORWAY

Norway Q2	C-store	Total market
Sales Euros	€457.6 million: +2.1% from year-ago quarter	€4.7 billion: +5.1%
Units	127.8 million: -0.7%	1.4 billion: +0.1%



What's hot?

Health Care: **+7.9%**
 Confectionery & Snacks: **+7.6%**
 Perishable Food: **+5.9%**
 Non-Alcoholic Beverages: **+3.4%**
 Ambient Food: **+2.6%**



What's not?

Frozen Food: **-5.2%**
 Alcoholic Beverages: **-4.1%**
 Health & Beauty Aids: **-3.6%**
 Tobacco: **-1.3%**
 Pet Food: **-0.3%**



MACRO TRENDS PORTUGAL

Portugal Q2	C-store	Total market
Sales Euros	€325.5 million: +2.4% from year-ago quarter	€3.0 billion: +8.5%
Units	185.9 million: +0.7%	1.5 billion: +4.8%



What's hot?

Health Care: **+20.4%**
 Confectionery & Snacks: **+13.9%**
 Tobacco: **+10.5%**
 Non-Alcoholic Beverages: **+4.2%**
 Perishable Food: **+3.2%**



What's not?

Paper Products: **-6.8%**
 Health & Beauty Aids: **-2.5%**
 Pet Food: **-1.1%**
 Ambient Food: **-0.5%**
 Home Care: **-0.4%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS SPAIN

Spain Q2	C-store	Total market
Sales Euros	€2.6 billion: +2.6% from year-ago quarter	€21.5 billion: +4.1%
Units	1.4 billion: +2.0%	10.3 billion: +1.6%



What's hot?

Frozen Food: **+8.8%**
 Non-Alcoholic Beverages: **+6.1%**
 Health & Beauty Aids: **+5.1%**
 Perishable Food: **+4.6%**
 Pet Food: **+3.8%**



What's not?

Tobacco: **-17.6%**
 Alcoholic Beverages: **-0.1%**
 Ambient Food: **+0.0%**
 Home Care: **+0.3%**
 Paper Products: **+0.9%**



MACRO TRENDS SWEDEN

Sweden Q2	C-store	Total market
Sales Euros	€502.5 million: -0.2% from year-ago quarter	€5.5 billion: +5.7%
Units	174.7million: -3.7%	2.1 billion: +1.2%



What's hot?

Confectionery & Snacks: **+4.8%**
 Perishable Food: **+4.4%**
 Ambient Food: **+0.4%**
 Non-Alcoholic Beverages: **+0.3%**
 Tobacco: **-2.2%**



What's not?

Health Care: **-13.6%**
 Frozen Food: **-8.0%**
 Alcoholic Beverages: **-7.4%**
 Home Care: **-7.0%**
 Health & Beauty Aids: **-4.8%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

Convenience Store Performance Highlights: **Asia-Pacific**

Asia-Pacific

Across the 10 NIQ-measured Asia-Pacific countries/regions included in this report, only three countries/regions (Hong Kong, Philippines and Taiwan) posted growth in both convenience store value and unit sales in Q2 2025. Convenience stores in China, the Philippines and Vietnam had better value and unit sales performance versus the remaining market. Convenience store value sales growth was the highest in the Philippines (+11.9%), South Korea (+3.9%) and Taiwan (+3.3%), with five other countries also showing gains. Only two countries, Singapore (-4.5%) and Indonesia (-3.7%), experienced convenience store value sales losses.

Due to differences in product hierarchies across the Asia-Pacific countries in this report, generalizations at the category level are not appropriate. However, both edible and non-edible categories appeared on the “what’s hot” and “what’s not” lists in the quarter.

In prior quarters, value sales growth among the top five “what’s hot” categories were stronger compared to the sales declines for the “what’s not” categories. The gap narrowed in Q2 2025 as 31 of 50 categories (top five categories multiplied by 10 countries) posted double-digit or better growth. Conversely, the number of “what’s not” categories with double-digit declines totaled 28 of 50 for the quarter.

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

Asia-Pacific: Macro Trends



MACRO TRENDS CHINA

China Q2	C-store	Total market
Sales Yen	32.3 billion: +1.2% from year-ago quarter	353.9 billion: -3.7%
Units	3.8 billion: -0.8%	46.5 billion: -3.5%



What's hot?

Liquor: **+10.5%**
Tobacco: **+3.4%**
Staple Food: **+2.6%**
Beverage: **+2.1%**
Other Personal Care: **+0.3%**



What's not?

Hair Care: **-14.4%**
Home Care: **-12.0%**
Oral Care: **-10.6%**
Dairy: **-9.5%**
Snacks: **-8.5%**



MACRO TRENDS HONG KONG

Hong Kong Q2	C-store	Total market
Sales HK dollars	1.6 billion: +1.5% from year-ago quarter	10.4 billion: +1.8%
Units	138.6 million: +1.9%	478.4 million: +2.8%



What's hot?

Skin Care: **+87.9%**
Oral Care: **+30.1%**
Dairy: **+8.3%**
Snacks: **-0.3%**
Liquor: **-0.8%**



What's not?

Home Care: **-12.0%**
Tobacco: **-8.4%**
Other Non-Food: **-5.1%**
Other Personal Care: **-3.2%**
Beverage: **-2.5%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS INDONESIA

Indonesia Q2	C-store	Total market
Sales Rupiahs	48.7 trillion: -3.7% from year-ago quarter	79.4 trillion: +1.4%
Units	4.3 billion: -6.8%	32.4 billion: +0.2%



What's hot?

Coffee: **+28.5%**
Cooking Oil: **+18.4%**
Soft Cake: **+13.4%**
Medicated Plaster: **+13.0%**
Energy Drinks: **+11.8%**



What's not?

Syrup: **-64.0%**
Gel Dessert RTD: **-62.1%**
Foundation: **-46.1%**
Cosmetics: **-36.0%**
Juice: **-34.2%**



MACRO TRENDS MALAYSIA

Malaysia Q2	C-store	Total market
Sales Ringgits	673.9 million: +2.4% from year-ago quarter	9.1 billion: +4.9%
Units	186.2 million: -0.0%	1.3 billion: +3.7%



What's hot?

Rice: **+50.7%**
Chocolate: **+14.6%**
Bottled Water: **+12.0%**
Gastro Upper Intestinal: **+9.5%**
Biscuits: **+5.8%**



What's not?

Air Freshener: **-24.8%**
Batteries: **-16.3%**
Fruit Beverages: **-8.3%**
Liquid Milk: **-6.7%**
Gum: **-2.1%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS PHILIPPINES

Philippines Q2	C-store	Total market
Sales Pesos	24.9 billion: +11.9% from year-ago quarter	557.5 billion: +9.8%
Units	639.0 million: +9.3%	22.1 billion: +5.6%



What's hot?

Health Care: **+22.7%**
Cigarettes: **+17.6%**
Confectionery & Snack: **+15.6%**
Cooking/Culinary Aids: **+15.1%**
Paper Products: **+14.9%**



What's not?

Pet Products: **-4.8%**
Other Non-Food/Household Gadgets: **+1.3%**
Household/Laundry Care Products: **+2.8%**
Other Food: **+5.2%**
Dairy: **+6.2%**



MACRO TRENDS SINGAPORE

Singapore Q2	C-store	Total market
Sales SG dollars	166.6 million: -4.5% from year-ago quarter	1.1 billion: +2.1%
Units	44.1 million: -5.9%	223.5 million: +1.9%



What's hot?

Infant Care: **+7.2%**
Confectionery & Snacks: **+2.8%**
Cigarettes: **-2.2%**
Personal Hygiene: **-2.7%**
Oral Care: **-2.8%**



What's not?

Paper Products: **-16.2%**
Health & Wellness: **-13.7%**
Laundry & Home Care: **-13.7%**
Alcoholic Beverages: **-12.3%**
Hair Care: **-8.2%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS SOUTH KOREA

South Korea Q2	C-store	Total market
Sales Won	3.3 trillion: +3.9% from year-ago quarter	7.7 trillion: -4.1%
Units	1.7 billion: -6.7%	2.2 billion: +0.7%



What's hot?

Processed Frozen Food: **+22.3%**
 Edible Oil: **+14.5%**
 Paste: **+14.1%**
 Personal Care: **+11.9%**
 Refrigerated Processed Food: **+9.3%**



What's not?

Other Food: **-75.1%**
 Hair Care: **-6.2%**
 Detergents: **-3.0%**
 Body Care: **-1.3%**
 Coffee & Tea: **-0.7%**



MACRO TRENDS TAIWAN

Taiwan Q2	C-store	Total market
Sales TW dollars	51.1 billion: +3.3% from year-ago quarter	103.5 billion: +3.3%
Units	1.1 billion: +3.1%	1.2 billion: +2.3%



What's hot?

Counter: **+236.6%**
 Disposable Warmers: **+108.2%**
 Rice & Bean Vermicelli: **+104.1%**
 Kitchen Towels: **+80.5%**
 Butter: **+80.0%**



What's not?

Oats: **-50.7%**
 Air Freshener: **-39.9%**
 Soap: **-39.1%**
 Brandy: **-38.8%**
 Liquid Soap: **-35.4%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions



MACRO TRENDS THAILAND

Thailand Q2	C-store	Total market
Sales Baht	93.1 billion: +1.4% from year-ago quarter	165.5 billion: -1.6%
Units	3.3 billion: -2.6%	6.7 billion: -2.2%



What's hot?

Hair Tonic: **+680.4%**
Coconut Milk: **+54.0%**
Coil/Stick Insecticide: **+37.5%**
Cooking Recipes: **+35.0%**
Liquid Insecticide Refill: **+34.3%**



What's not?

Face & Body Cleanser: **-56.2%**
Makeup & Nail: **-49.2%**
Toner: **-46.8%**
Makeup Remover: **-29.7%**
Refreshing Towels: **-26.2%**



MACRO TRENDS VIETNAM

Vietnam Q2	C-store	Total market
Sales Dong	18.6 trillion: +2.8% from year-ago quarter	31.9 trillion: -1.5%
Units	751.4 million: -1.7%	2.6 billion: -4.3%



What's hot?

Alcoholic Beverages: **+20.4%**
Confectionery: **+9.4%**
Cigarettes: **+8.0%**
Processed Food: **+6.5%**
Milk Base: **+5.5%**



What's not?

Non-Alcoholic Beverages: **-12.3%**
Baby Care: **-11.3%**
Home Care: **-8.0%**
Hair Care: **-7.7%**
Facial/Skin Care: **-2.5%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

Convenience Store Performance Highlights: **Latin America**

Latin America

Across the nine NIQ-measured Latin American countries included in this report, convenience stores came through with growth in both value and unit sales in only three (Colombia, Panama and Peru), and those same three were the only countries with better value and unit sales growth than the total market.

In Q2 2025, convenience stores faced extreme inflationary pressures in Argentina (average unit prices were up 37.6%) and Chile (+28.2%). Convenience stores had moderate to high inflationary pressures in four countries: Brazil (+12.9%), Uruguay (+11.9%), Colombia (+6.4%) and Mexico (+4.6%), and low inflationary pressures in Peru (+3.3%), Panama (+1.9%) and Costa Rica (-1.2%). Convenience store inflationary pressures were greater than the remaining market in six countries: Brazil, Chile, Colombia, Panama, Peru and Uruguay.

Value sales growth among the top five “what’s hot” categories were stronger compared to the sales declines for the “what’s not” categories. In Q2 2025, 32 of 45 categories (top five categories multiplied by nine countries) posted double-digit or better growth. Conversely, the number of “what’s not” categories with double-digit declines totaled just six of 45 categories. Eighteen of 45 categories on the “what’s not” list delivered growth, while 27 experienced value sales declines.

*Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales*

The convenience channel in **Argentina** showed a 31.5% growth in value, mainly driven by price increases (+37.6%), as units sold fell by 4.4%. The categories with the highest growth were semi-hard cheese, salty snacks, yogurt, soft cheese and sliced cold cuts, while toilet paper, insecticides, cooking oils, yerba mate and dry pasta showed the lowest growth.

The convenience channel scenario in **Brazil** has not undergone major changes compared to the first quarter of 2025. High inflation remains a significant obstacle for this channel, as does the underperformance of strategic categories—especially beer—when compared to other formats. The channel is experiencing a volume contraction and is more affected than others by the challenging macroeconomic environment Brazil is facing. Other proximity formats, such as small supermarkets, are performing better than convenience stores, which further hinders their performance.

Although there has been growth in revenue within the convenience channel in **Chile**, it remains below previous years, reaching a 7.6% increase in Q2 2025. Additionally, there were declines in unit sales throughout the quarter as there has been a slowdown in the expansion of c-store locations.

Colombia's convenience market continued to grow rapidly and has successfully capitalized on its importance within the overall structure, mainly driven by categories from Colombia's basic consumer basket. Notably, coffee and tobacco showed strong growth within formats under 500 square meters. Additionally, private label products have gained in the format, becoming one of the main drivers of accelerated growth.

Costa Rica experienced a contraction in the convenience channel, with a 5.1% decline in value and a 3.9% decline in units sold, accompanied by a slight decrease in prices. The best performing categories were chocolates, packaged bread and flavored alcoholic beverages, while soft drinks, juices and detergents showed declines. The channel is facing challenges in maintaining its relevance.

*Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales*

In **Mexico**, the convenience channel grew by 2.9% in value, although unit sales declined by 1.9%. The average price increased by 4.6%. The best-performing categories were body and facial care products, chocolate confectionery and white milk, while isotonic drinks, electrolyte solutions and still water saw declines. The channel remains stable, though there are signs of a slowdown in volume.

Panama showed a 4.2% growth in value and a 2.2% increase in units sold in the convenience channel. The most notable categories were pet food, sanitary protection and ice cream, while liquid milk, oils and isotonic drinks declined. The channel maintains a positive performance, although without major structural changes.

In **Peru**, there was an extremely high rate of store openings in convenience stores. This, along with higher prices, contributed to many key categories showing growth compared to last year.

Uruguay's neighborhood supermarkets, express stores and minimarkets showed stable performance and maintained their market share thanks to their convenience and proximity.

Consumers prioritized:

- More frequent purchases with lower ticket value.
- Promotions and budget-friendly brands, although leading brands began to regain ground.
- Immediate replenishment, especially in categories like beverages, snacks and hygiene products.

*Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales*

Latin America: Macro Trends



MACRO TRENDS ARGENTINA

Argentina Q2	C-store	Total market
Sales Pesos	761.7 billion: +31.5% from year-ago quarter	4.1 trillion: +38.7%
Units	391.5 million: -4.4%	1.6 billion: -2.0%
Avg. unit price change	+37.6%	+41.5%



What's hot?

Semi-Hard Cheese: **+86.5%**
Salty Snacks: **+68.0%**
Yogurt: **+65.5%**
Soft Cheese: **+54.2%**
Sliced Cold Cuts: **+50.1%**



What's not?

Toilet Paper: **+1.6%**
Insecticides: **+2.8%**
Cooking Oils: **+7.4%**
Yerba Mate: **+7.6%**
Dry Pasta: **+8.0%**



MACRO TRENDS BRAZIL

Brazil Q2	C-store	Total market
Sales Reales	1.3 billion: +9.5% from year-ago quarter	199.6 billion: +12.2%
Units	157.3 million: -3.0%	21.6 billion: +3.2%
Avg. unit price change	+12.9%	+8.7%



What's hot?

Cigarettes: **+21.1%**
Chocolate: **+18.2%**
Chewing Gum: **+12.8%**
Candy: **+10.0%**
Energy Drinks: **+6.4%**



What's not?

Ice Cream: **-17.6%**
Beer: **-5.6%**
Salty Snacks: **+0.9%**
Mineral Water: **+2.4%**
Soft Drinks & Mixed Beverages: **+4.2%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales



MACRO TRENDS CHILE

Chile Q2	C-store	Total market
Sales Pesos	188.0 billion: +7.6% from year-ago quarter	5.4 trillion: +6.6%
Units	131.5 million: -16.1%	2.4 billion: +2.5%
Avg. unit price change	+28.2%	+4.0%



What's hot?

Individual Ice Cream: **+14.8%**
Mineral Water: **+12.2%**
Coffee: **+10.4%**
Energy Drinks: **+9.6%**
Chocolates: **+9.4%**



What's not?

Sweet Baked Goods: **-12.3%**
Frozen Prepared Meals: **-2.1%**
Hot Dogs: **-1.1%**
Cigarettes: **+1.7%**
Cookies: **+2.3%**



MACRO TRENDS COLOMBIA

Colombia Q2	C-store	Total market
Sales Pesos	10.1 trillion: +15.2% from year-ago quarter	17.2 trillion: +9.9%
Units	2.0 billion: +8.3%	2.6 billion: +5.5%
Avg. unit price change	+6.4%	+4.2%



What's hot?

Coffee: **+56.8%**
Tobacco: **+38.6%**
Fruit: **+32.8%**
Pork: **+28.8%**
Eggs: **+24.3%**



What's not?

Sugar: **-9.8%**
Rice: **-7.6%**
UHT Milk: **+4.0%**
Chicken: **+6.2%**
Packaged Bread: **+10.5%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales



MACRO TRENDS COSTA RICA

Costa Rica Q2	C-store	Total market
Sales Colones	201.3 billion: -5.1% from year-ago quarter	835.6 billion: -0.1%
Units	201.2 million: -3.9%	793.5 million: -0.3%
Avg. unit price change	-1.2%	+0.2%



What's hot?

Chocolates: **+10.1%**
 Packaged Bread: **+4.5%**
 Flavored Alcoholic Beverages: **+2.0%**
 Processed Meats/Cold Cuts: **+1.7%**
 Liquor: **+1.5%**



What's not?

Soft Drinks: **-10.5%**
 Juices, Nectars, Refreshing Beverages: **-10.3%**
 Laundry Detergents: **-9.4%**
 Rice: **-8.3%**
 Canned Tuna: **-8.0%**



MACRO TRENDS MEXICO

Mexico Q2	C-store	Total market
Sales Pesos	104.0 billion: +2.9% from year-ago quarter	543.9 billion: +3.1%
Units	3.3 billion: -1.9%	19.9 billion: -2.5%
Avg. unit price change	+4.6%	+4.6%



What's hot?

Body & Face Care: **+12.0%**
 Chocolate: **+11.3%**
 White Milk: **+8.6%**
 Packaged Sweet Bread: **+8.5%**
 Beer: **+8.4%**



What's not?

Isotonic Drinks: **-17.0%**
 Electrolyte Solutions: **-12.8%**
 Ice Cream & Popsicles: **-3.3%**
 Still Water: **-2.6%**
 Juices, Nectars, Refreshing
 Beverages, Soy Drinks: **-1.7%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
 Includes categories accounting for 1% or more of c-store value sales



MACRO TRENDS PANAMA

Panama Q2	C-store	Total market
Sales U.S. dollars	245.0 million: +4.2% from year-ago quarter	549.4 million: -1.3%
Units	292.2 million: +2.2%	572.1 million: -2.4%
Avg. unit price change	+1.9%	+1.1%



What's hot?

Pet Food: **+26.7%**
Sanitary Protection: **+18.2%**
Ice Cream: **+13.5%**
Snacks: **+11.2%**
Disposable Diapers: **+7.8%**



What's not?

Liquid Milk: **-8.6%**
Oils & Shortening: **-8.4%**
Tomato Puree & Sauce: **-3.8%**
Isotonic Drinks: **-3.6%**
Canned Tuna: **-2.1%**



MACRO TRENDS PERU (convenience store view of Lima, Peru only)

Peru Q2	C-store	Total market
Sales Soles	456.8 million: +18.9% from year-ago quarter	7.1 billion: +7.4%
Units	111.7 million: +15.1%	904.0 million: +10.2%
Avg. unit price change	+3.3%	-2.5%



What's hot?

Electrolyte Solutions: **+32.7%**
Industrial Ice Cream: **+26.7%**
Impulse Ice Cream: **+24.0%**
Mineral Water: **+23.6%**
Ice: **+23.4%**



What's not?

Beer: **+2.0%**
Cigarettes: **+5.4%**
Wine: **+11.0%**
Salty Snacks: **+17.0%**
Soft Drinks: **+19.4%**

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales



MACRO TRENDS
URUGUAY

Uruguay Q2	C-store	Total market
Sales Pesos	3.0 billion: +4.8% from year-ago quarter	28.5 billion: +6.4%
Units	28.6 million: -6.3%	223.2 million: -1.0%
Avg. unit price change	+11.9%	+7.5%



- What's hot?**
Eggs: +10.7%
Wine: +10.3%
Ready-to-Drink Juices: +10.2%
Salty Snacks: +9.2%
Cheese: +7.9%



- What's not?**
Cigarettes: -5.3%
Milk: -4.4%
Baked Goods: -2.9%
Yerba Mate: -1.5%
Soft Drinks: -1.5%

Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions
Includes categories accounting for 1% or more of c-store value sales

About NACS and our partners



For more than 60 years, NACS has been recognized as the premiere association for convenience and fuel retailers. NACS has more than 1,000 retail member companies that cumulatively represent more than 200,000 stores in 50-plus countries, including 90,000 stores in the United States alone. The U.S. convenience store industry, with more than 152,000 stores nationwide selling fuel, food and merchandise, conducts 160 million transactions daily and had sales of \$837 billion in 2024. For more information, visit **convenience.org**.



NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than \$7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

For more information, please visit **www.niq.com**

Source: NIQ, Convenience Stores, Q2 2025

For total tracked sales metrics (c-store vs. total market): Depending on the region, remaining market channels is defined as Club, Dollar, Drug, Food, Mass and Military.

CHANNEL DEFINITIONS BY COUNTRY

Region	Country	Channel	Channel Definition	Currency
Asia	China	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Sales area is generally <500 sq. meters Must be part of Chain (Store count ≥ 3) 	Chinese yuan renminbi
	Hong Kong	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Other convenience includes convenience stores in gas station Store selling food, HBA and household products confectionary and impulse categories Less than 1,000 sq. meters and less than 4 check-outs 	Hong Kong dollar
	Taiwan	Convenience	<ul style="list-style-type: none"> Modern Trade, Four CVS banner in Taiwan: 7-Eleven, Family Mart, Hi Life and OK 	New Taiwan dollar
	South Korea	Convenience	<ul style="list-style-type: none"> Self-service facility, open 24 hours a day or 16+ hours (eg: Emart24, Ministop, 7-Eleven, CU, GS25, C-Space, Personal Convenience Store, etc.) Less than 1,000 sq. meters and less than 4 check-outs 	Korean won
	Philippines	Convenience and Gas Station CVS		Philippine peso
	Vietnam	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Modern Trade, Including Super/Hypermarket, Convenience Store, Minimart, Health & Beauty and independent MT stores (excluding Mom & Baby chain) 	Vietnamese dong
	Indonesia	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Modern trade with selling area 50-300 sq. meters, Number of Checkouts: 1-4 	Indonesian rupiah
	Singapore	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Usually operate 24 hours CVS - MUST belong to one of these chains: 7-Eleven, Cheers, Cheers by FairPrice, FairPrice Xpress PM - MUST belong to one of these chains: Caltex Starmart, SP 	Singapore dollar
	Malaysia	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Attached or on the premises of petrol stations = >200 square feet and more than 10 listed products categories 	Malaysian ringgit
	Thailand	Convenience and Gas Station CVS	<ul style="list-style-type: none"> Sales space under 500 sq. meters At least 60% of sales space is for the combined super-categories: Food & Beverages, Personal Care, and Household products Serves hot or cold beverages from ready to drink dispenser or ready to eat hot food for consumption off-premises 	Thai baht
Europe	Ireland	Petrol	<ul style="list-style-type: none"> Store that sells Petrol Gas and has other CPG offerings (Excluding Tesco). Ex. Costcutter, Circle K, Centra 	
	Poland	Petrol	<ul style="list-style-type: none"> An outlet selling fuels and very often car accessories. It can handle food and chemical/ cosmetic products 	
	Norway	Petrol	<ul style="list-style-type: none"> Superettes <400 sq. meters and Petrol Stations (excl Esso) 	
	Denmark	Petrol	<ul style="list-style-type: none"> Superettes with selling area <400 sq. meters, Petrol Stations & Tobacco Kiosk 	
	Sweden	Convenience	<ul style="list-style-type: none"> Superettes with selling area <400 sq. meters, Petrol Stations & Tobacco Kiosk 	
	Netherlands	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters and Petrol Stations 	
	Italy	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters 	
	Spain	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters and Petrol Stations 	
	Austria	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters 	
	Belgium	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters 	
	Germany	Convenience	<ul style="list-style-type: none"> Superettes with selling area <400 sq. meters, Petrol Stations and Tobacco Kiosk 	
	Denmark	Convenience	<ul style="list-style-type: none"> Superettes with selling area <400 sq. meters, Petrol Stations and Tobacco Kiosk 	
	Sweden	Convenience	<ul style="list-style-type: none"> Traditional stores and Superettes with selling area <400 sq. meters 	
	Portugal	Convenience	<ul style="list-style-type: none"> Superettes with selling area <400 sq. meters 	

CHANNEL DEFINITIONS BY COUNTRY (continued)

Region	Country	Channel	Channel Definition	Currency
Europe	United Kingdom	Convenience and Petrol Station CVS	<ul style="list-style-type: none"> All convenience stores <400 sq. meters selling area Includes Petrol Stations, Traditional Trade (Independents) and all Supermarket c-stores. 	Euros
	France	Convenience	<ul style="list-style-type: none"> Superettes with <400 sq. meters selling area Channel is called Proxi in France. Locally defined 	
Latin America	Argentina	Convenience		ARS (Argentine peso)
	Brazil	Convenience and Gas Station CVS		BRL (Brazilian Real)
	Chile	Convenience and Gas Station CVS		CLP (Chilean peso)
	Colombia	Convenience	<ul style="list-style-type: none"> C-stores, minimarkets and hard discounters less than 200 sq. meters 	COP (Colombian peso)
	Costa Rica	Convenience and minimarkets		CRC (Costa Rican colón)
	Honduras	Convenience and minimarkets	<ul style="list-style-type: none"> Convenience market of Honduras includes c-stores and minimarkets Only beverages are measured in this channel 	HNL (Honduran lempira)
	Mexico	Proximity	<ul style="list-style-type: none"> Proximity market in Mexico includes c-stores, express self-service stores, minimarkets and chain pharmacies with minimarkets 	MXN (Mexican peso)
	Panama	Convenience and minimarkets	<ul style="list-style-type: none"> Includes c-stores and minimarkets 	US Dollars
	Peru	Convenience	<ul style="list-style-type: none"> C-stores are only measured in Lima, Peru 	PEN (Peruvian sol)
	Uruguay	Convenience		UYU (Uruguayan peso)
North America	United States	Convenience	<ul style="list-style-type: none"> Includes small format stores, typically between 800 and 5,000 selling square feet and 500 and 1,500 SKUs This channel includes stores that may or may not sell gasoline and offer fast food services 	US Dollars
	Canada	Convenience and Gas	<ul style="list-style-type: none"> Comprises a closed group of banners with stores and kiosks that are affiliated, licensed or owned by an oil company Classic convenience banners are defined as being open long hours and have an emphasis on "convenience" grocery categories and fast food. Convenience store location may sell gasoline but the store itself is not owned by an oil company 	Canadian Dollar



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