NACS | Research & Technology

NACS Global Convenience Store Industry Report

Q2 2026

YOUR QUARTERLY PULSE
ON GLOBAL TRENDS

NIQ

Including exclusive
NIQ syndicated data

Q2
26

If you're a regular reader of these quarterly reports, you'll notice a new face and name associated with this message.

I am the new NACS President and CEO, succeeding Henry Armour who served in the position for 20-plus years. But I am far from new to NACS. I served on the NACS International Board for 19 years and was on the NACS Board of Directors for 11 years, including a term as 2018-19 NACS Chairman of the Board.

Over the past two-plus decades, I have travelled the world to find new ideas that I could bring back to my companies. At Statoil, I led the development of the first American-style convenience store in Ireland. A few years later, as president & CEO of Aramark Northern Europe from 2017 to 2024, I oversaw a team of over 20,000 employees across more than 2,800 locations in the United Kingdom, Ireland and EMEA (Europe, the Middle East and Africa), which served an estimated 1 million meals a day.

Change can come fast, and it can be inspired from anywhere in the world. Our Global 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, the insights gleaned from these reports can help you develop strategic plans to take advantage of the top trends in convenience retailing that are already redefining markets in 2026—no matter where they are occurring around the globe.

In an interconnected global economy, these quarterly reports go beyond what is happening within a specific country's market; these numbers can also provide both weak and strong signals about shifts in in consumer preferences. And with competition continuing to heat up for the convenience customer, that market intelligence can make the difference between profitable and less successful businesses.

For 65 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 analysis about what it could mean in your market and in markets around the world. I am honored and excited to lead how we provide world-class insights to our members and the broader convenience retailing community.



Frank Gleeson
President & CEO
NACS

NACS
Advancing Convenience & Fuel Retailing
convenience.org

Dear NACS members,

We are pleased to present the NIQ–NACS Q2 2026 Global Convenience Store Report. This report provides an analysis of convenience retail performance across 33 countries, highlighting key growth trends, inflationary impacts, category performance and regional market dynamics shaping the channel. Despite ongoing economic uncertainty and competitive pressures, convenience retail remained resilient in Q2, with 23 of 33 markets delivering value sales growth.

Key themes from the Q2 2026 report include:

- **Inflationary impact:** Pricing remained a key growth driver across Latin America and Asia-Pacific, with average unit prices increasing 25.0% in Argentina, 7.7% in the Philippines, 7.1% in Mexico, 7.0% in Vietnam, 8.2% in Singapore and 5.4% in Brazil. These inflationary pressures helped drive double-digit convenience store value sales growth in several markets, particularly across Latin America and Asia-Pacific. In many cases, convenience stores also outperformed the remaining market, demonstrating the channel's ability to capitalize on both pricing gains and consumer demand.

- **Opportunities in the European market:** Europe remained under pressure, accounting for seven of the ten markets that saw declines versus the previous year. Austria, France and Spain were the only countries to outperform their total markets in both value and unit sales growth. Record June temperatures boosted demand for beverages, snacks and frozen foods, while the FIFA World Cup provided an additional lift to beverage and alcohol sales, with some momentum expected to carry into Q3. Looking ahead, retailers' greatest opportunities lie in increasing visit frequency among existing shoppers and attracting new shoppers through expanded meal solutions and loyalty programs.

- **Consumers shifting away from tobacco continues to impact convenience stores:** Tobacco continues to weigh heavily on convenience store performance in North America, particularly in the U.S., where the category represents 33.7% of total convenience store sales, compared to less than 1% of sales in the remaining market. As a result, U.S. convenience value sales declined 2.6% while the remaining market grew 0.7%, reflecting the outsized impact of declining tobacco consumption on the convenience channel. In Canada, convenience sales fell 2.2%, though the expansion of liquor sales into convenience stores has helped offset some of the pressure from declining tobacco sales.

The convenience industry continues to demonstrate its ability to adapt to changing consumer needs. Retailers that focus on beverages, fresh food, health and wellness offerings, and value-driven promotions while addressing volume declines and increasing competition will be best positioned for growth in the second half of 2026.



Nicole Collida Davis
Managing Director, US Retail, NIQ

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Market Overview

Convenience Store Growth Rankings Overview

In Q2 2026, all but 10 of the 33 NIQ-measured countries included in this report experienced gains in convenience store value sales versus Q2 2025. Losses included seven European countries, the United States, Canada and China. Of the countries with gains, seven experienced double-digit growth in Q2 2026 with five in Latin America (Peru, Argentina, Colombia, Brazil and Chile) and two in Asia-Pacific (Vietnam and the Philippines). There were 14 countries with improved value growth in Q2 2026 versus the prior quarter, down from 19 countries with improved value growth in Q1 2026 versus the prior quarter.

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

	Q1'26	Q2'26	
Peru	25.9%	31.1%	↑
Argentina	21.9%	22.5%	↑
Colombia	15.3%	16.7%	↑
Vietnam	13.6%	14.0%	↑
Philippines	10.7%	12.6%	↑
Brazil	7.7%	10.4%	↑
Chile	10.3%	10.1%	↓
Spain	5.7%	7.9%	↑
Uruguay	5.7%	7.2%	↑
France	5.5%	6.5%	↑
Mexico	7.1%	6.4%	↓
Costa Rica	3.6%	6.3%	↑
Thailand	5.4%	4.6%	↓
Taiwan	5.2%	3.8%	↓
Indonesia	13.0%	3.7%	↓
Austria	4.1%	2.7%	↓
Panama	6.2%	2.6%	↓

	Q1'26	Q2'26	
Malaysia	8.1%	2.1%	↓
South Korea	-0.6%	1.5%	↑
Hong Kong	2.5%	1.4%	↓
Ireland	0.9%	1.2%	↑
Singapore	5.3%	0.4%	↓
Belgium	0.4%	0.0%	↓
Denmark	-3.2%	-0.1%	↑
Great Britain	-0.5%	-0.8%	↓
Sweden	-0.5%	-1.4%	↓
Netherlands	-12.4%	-1.6%	↑
Canada	-0.8%	-2.2%	↓
Italy	-0.9%	-2.5%	↓
United States	0.1%	-2.6%	↓
Norway	-1.5%	-3.0%	↓
China	4.5%	-4.8%	↓
Portugal	-3.6%	-5.0%	↓

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**

Q2 2026

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Canada

In Q2 2026, Canada convenience stores underperformed versus the remaining market. Convenience store dollar sales declined by 2.2% while dollar sales for the remaining market grew 2%. Convenience store unit sales fell 1.3% versus a 1.0% loss 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. Excluding tobacco products, convenience store dollar sales increased 0.7% versus a gain of 2.1% for the remaining market, while convenience store units declined 0.5% versus a 1.0% loss for the remaining market. Convenience store promotion support grew 2.3% while promotion support fell 1.7% for the remaining market. However, the disparity in promotion support between convenience stores and the remaining market continued as 39.1% of units were sold on a promotion in convenience stores versus 51.2% for the remaining market.

The top five categories delivering the best convenience store dollar sales growth in Q2 2026 had growth rates ranging from a high of +15.9% for liquor to a low of +3% for beer. The top five categories delivering the biggest losses ranged from a high of -9.7% for packaged sweet snacks to a low of -7.5% for non-edible grocery.

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	$1.9 billion: -2.2% from year-ago quarter	$28.7 billion: **+2.0%**
Sales (excluding Tobacco)	$1.0 billion: **+0.7%**	$28.6 billion: **+2.1%**
Units	282.0 million: -1.3%	4.664 billion: -1.0%
Units (excluding Tobacco)	236.4 million: -0.5%	4.660 billion: -1.0%
Avg. unit price change	-0.8% (+1.3% ex-Tobacco)	**+3.0% (+3.1% ex-Tobacco)**
% Units on any promo	**39.1%**	**51.2%**
% Change units on any promo	**+2.3%**	-1.7%

What's hot?
Liquor: **+15.9%**
Automotive Products: **+6.2%**
Wine: **+4.0%**
General Merchandise: **+3.9%**
Beer: **+3.0%**

What's not?
Packaged Sweet Snacks: -9.7%
Other Dairy & Deli Products: -8.5%
Other Tobacco: -8.5%
Packaged Bread: -8.1%
Non-Edible Grocery: -7.5%

What's Hot/Not for Canada based on categories CAN$1MM+
Source: NIQ Retail Measurement Service, Local Country Currency and Product Definitions

United States

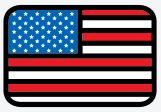
In Q2 2026, U.S. convenience store dollar sales fell 2.6% while sales grew 0.7% in the remaining market. Excluding tobacco products, which accounted for 33.7% of convenience store sales but less than 1% of the remaining market sales, convenience store dollar sales declined 2.8%. Convenience store unit sales fell 5.3% or twice the rate of the previous quarter and nearly three times more than the remaining market in the current quarter. Results were similar with or without tobacco product sales. Convenience retailers had inflationary pressures that were comparable to those experienced by the remaining market; average unit prices in convenience stores increased by 2.8% while those in the remaining market increased by 2.6%.

Convenience store promotion support declined 2.6% versus a 2% decline in the remaining market. Promotional levels in convenience stores remained below those in the remaining market (22.7% of convenience and 30.6% of remaining market units were sold on a promotion).

The top five categories delivering the best convenience store dollar sales growth in Q2 2026 had growth rates ranging from a high of 4.2% for frozen dispensed beverages to a low of -0.6% for other tobacco. Fluid milk products (-9.2%), non-edible grocery (-8.6%), general merchandise (-7.1%), packaged bread (-6.9%) and edible grocery (-6.7%) experienced the largest declines in dollar sales.

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	$49.6 billion: -2.6% from year-ago quarter	$293.7 billion: **+0.7%**
Sales (excluding Tobacco)	$32.9 billion: -2.8%	$292.0 billion: **+0.7%**
Units	11.8 billion: -5.3%	65.8 billion: -1.8%
Units (excluding Tobacco)	9.7 billion: -5.0%	65.7 billion: -1.8%
Avg. unit price change	**+2.8% (+2.3% ex-Tobacco)**	**+2.6% (+2.6% ex-Tobacco)**
% Units on any promo	**22.7%**	**30.6%**
% Change units on any promo	-2.6%	-2.0%

What's hot?
Frozen Dispensed Beverages: **+4.2%**
Food Service Prepared Onsite: **+2.7%**
Liquor **+2.3%**
Wine: **+0.9%**
Other Tobacco: -0.6%

What's not?
Fluid Milk Products: -9.2%
Non-Edible Grocery: -8.6%
General Merchandise: -7.1%
Packaged Bread: -6.9%
Edible Grocery: -6.7%

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**

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Europe

Across twelve NIQ-measured European countries included in this report, only three countries (Austria, France and Spain) had better convenience store value and unit growth in Q2 2026 compared to the total market. Convenience store value growth was the highest in Spain (+7.9%), followed by France (+6.5%), Austria (+2.7%) and Ireland (+1.2%).

Convenience store value sales declined in Portugal (-5%), Norway (-3%), Italy (-2.5%), the Netherlands (-1.6%), Sweden (-1.4%), Great Britain (-0.8%*) and Denmark (-0.1%). Six countries—France (+7.5%), Spain (+7%), Sweden (+2.5%), Belgium (+1.9%), Denmark (+0.6%) and Austria (+0.4%)—had convenience store unit sales growth. Unit sales declines were the largest in Portugal (-8.3%), Norway (-6.3%), the Netherlands (-2.7%), Great Britain (-2.1%), Italy (-1.7%) and Ireland (-1%).

As noted in previous reports, there was a fair amount of consistency in the high-growth categories in the second quarter. There were six top-growth categories in five or more countries. Health care and non-alcoholic beverages (both in 10 countries) topped the list followed by frozen food (in nine countries), health & beauty aids (seven), perishable food (six) and ambient food (five).

There was also a fair amount of consistency in low-growth categories across several European countries. In Q2, there were seven low-growth categories in five or more countries—tobacco, and paper products (both in nine countries) topped the list followed by home care and confectionery & snacks (both in seven), pet food (in six), and alcoholic beverages and health & beauty aids (each in five).

IN Q2 2026, THERE WERE SIX TOP-GROWTH CATEGORIES IN FIVE OR MORE COUNTRIES—HEALTH CARE AND NON-ALCOHOLIC BEVERAGES (BOTH IN 10 COUNTRIES) TOPPED THE LIST FOLLOWED BY FROZEN FOOD (IN NINE COUNTRIES), HEALTH & BEAUTY AIDS (SEVEN), PERISHABLE FOOD (SIX) AND AMBIENT FOOD (FIVE).



* *When excluding tobacco, which accounted for about one-fifth of Great Britain's total convenience store value sales, convenience store value sales grew 1.3% in Q2 2026.*

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

WESTERN EUROPE

Q2 GROWTH WAS HELPED BY EARLY SUMMER HEATWAVES IN WESTERN EUROPE

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

NIQ insight shows that promotions, events and changes in the weather move the needle on fast-moving consumer goods purchases in convenience stores. In Western Europe, summer heatwaves began earlier than usual in May this year, and June was the hottest month ever. The impact was a surge in spending on beverages, snacks and frozen foods.

With lower inflation than last year, the total market growth in Europe* was +1.3% (value) and +1.2% (unit), but growth was held back a little as the big sales uplift to Easter 2026 was at the end of Q1 this year, not Q2. Convenience store growth was similar at +0.7% (value) and +0.4% (unit).
The fastest growing super category in convenience stores was health care (+8.3%), and while this is still a small category it reflects a trend across all channels towards health, wellbeing and nutritional products. Frozen sales (+5.4%) and non-alcoholic beverages (+5%) soared due to the hot weather as shoppers looked for immediate refreshments. Alcoholic beverages (+1%) benefited at the end of June from the start of the FIFA World Cup.

The convenience channel gained market share in Spain (sales +7.9%), France (+6.5%) and Portugal (+5%). However, in the UK, convenience store sales fell -0.8% due to declines in tobacco and alcoholic beverages. There was also pressure from discounters and online channels, with rapid delivery accelerating to 9% of all e-commerce sales in the UK (NIQ Digital Purchases).

Looking forward, the World Cup effect is expected to help sales in Q3 as will an increase in promotions, which are up to 26% of all sales in Western Europe and over 32% for brands, and a key driver of spend in convenience stores.

Retailers and brands are also looking to find innovative ways to encourage shoppers to visit stores more often, often using loyalty schemes. However, the biggest growth opportunities are in attracting new shoppers, missions such as `dinner for tonight` rather than immediate consumption needs, and food delivery apps where the added fee for home delivery no longer seems to be a barrier to purchase for many shoppers.

**NIQ European Strategic Planner 13 countries*

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	€1.5 billion: **+2.7%** from year-ago quarter	€5.2 billion: **+1.7%**
Units	727.6 million: **+0.4%**	2.2 billion: **-3.7%**

What's hot?
Health Care: **+16.4%**
Frozen Food: **+11.3%**
Perishable Food: **+6.4%**
Ambient Food: **+4.6%**
Pet Food: **+2.5%**

What's not?
Tobacco: **-7.2%**
Home Care: **-4.3%**
Confectionery & Snacks: **-3.8%**
Health & Beauty Aids: **-3%**
Alcoholic Beverages: **-1.2%**



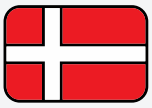
MACRO TRENDS **BELGIUM**

Belgium Q2	C-store	Total market
Sales Euros	€232.6 million: **+0.0%** from year-ago quarter	€6.3 billion: **+0.6%**
Units	75.4 million: **+1.9%**	2.2 billion: **+1.6%**

What's hot?
Health Care: **+7.5%**
Non-Alcoholic Beverages: **+5.7%**
Frozen Food: **+1.8%**
Confectionery & Snacks: **+0.6%**
Ambient Food: **-0.1%**

What's not?
Tobacco: **-5.8%**
Home Care: **-4.2%**
Health & Beauty Aids: **-2.4%**
Alcoholic Beverages: **-1.0%**
Paper Products: **-1.0%**

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

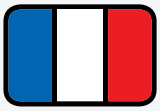


MACRO TRENDS **DENMARK**

Denmark Q2	C-store	Total market
Sales Euros	€454 million: -0.1% from year-ago quarter	€4.2 billion: **+0.6%**
Units	114.5 million: **+0.6%**	1.5 billion: **+0.4%**

What's hot?
Health Care: **+57.7%**
Non-Alcoholic Beverages: **+7.1%**
Frozen Food: **+7.0%**
Health & Beauty Aids: **+6.9%**
Ambient Food: **+2.7%**

What's not?
Paper Products: -5.1%
Tobacco: -4.9%
Confectionery & Snacks: -2.4%
Pet Food: **+0.3%**
Perishable Food: **+1.1%**



MACRO TRENDS **FRANCE**

France Q2	C-store	Total market
Sales Euros	€4 billion: **+6.5%** from year-ago quarter	€36.6 billion: **+1.6%**
Units	1.4 billion: **+7.5%**	12.9 billion: **+2.6%**

What's hot?
Health Care: **+31.8%**
Tobacco: **+21.3%**
Frozen Food: **+14.2%**
Non-Alcoholic Beverages: **+10.9%**
Health & Beauty Aids: **+8.2%**

What's not?
Home Care: **+1.4%**
Paper Products: **+1.9%**
Alcoholic Beverages: **+1.9%**
Confectionery & Snacks: **+3.7%**
Pet Food: **+4.6%**

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

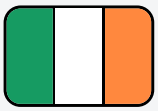


MACRO TRENDS **GREAT BRITAIN**

Great Britain Q2	C-store	Total market
Sales Euros	€12.1billion: -0.8% from year-ago quarter	€52.7 billion: **+2%**
Sales (excluding Tobacco)	€10 billion: **+1.3%**	€49.6 billion: **+2.8%**
Units	3.9 billion: -2.1%	18.8 billion: -0.3%
Units (excluding Tobacco)	3.8 billion: -1.7%	18.6 billion: -0.2%

What's hot?
Health Care**: +4.8%**
Non-Alcoholic Beverages: **+4.8%**
Health & Beauty Aids: **+3.8%**
Frozen Food: **+2.9%**
Perishable Food: **+0.8%**

What's not?
Tobacco: -9.6%
Home Care: -4%
Paper Products: -3.5%
Pet Food: -2%
Alcoholic Beverages: -0.3%



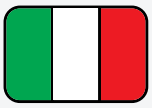
MACRO TRENDS **IRELAND**

Ireland Q2	C-store	Total market
Sales Euros	€1.1 billion: **+1.2%** from year-ago quarter	€3.4 billion: **+1.4%**
Units	293.4 million: -1%	1.1 billion: **+1.2%**

What's hot?
Non-Alcoholic Beverages: **+3.2%**
Confectionery & Snacks: **+3%**
Ambient Food: **+1.9%**
Alcoholic Beverages: **+1.6%**
Health Care: **+1.4%**

What's not?
Frozen Food: -1.7%
Pet Food: -1.7%
Perishable Food: -1.5%
Health & Beauty Aids: -0.4%
Tobacco: -0.4%

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: **-2.5%** from year-ago quarter	€25.4 billion: **-0.0%**
Units	1.1 billion: **-1.7%**	12.6 billion: **+0.9%**

What's hot?
Frozen Food: **+2.5%**
Perishable Food: **-0.7%**
Non-Alcoholic Beverages: **-0.9%**
Health & Beauty Aids: **-2.5%**
Pet Food: **-2.6%**

What's not?
Tobacco: **-29.5%**
Confectionery & Snacks: **-5.7%**
Home Care: **-5.7%**
Paper Products: **-4.8%**
Health Care: **-4%**



MACRO TRENDS **NETHERLANDS**

Netherlands Q2	C-store	Total market
Sales Euros	€856.5 million: **-1.6%** from year-ago quarter	€12.7 billion: **+1%**
Units	150.6 million: **-2.7%**	5.1 billion: **+0.7%**

What's hot?
Non-Alcoholic Beverages: **+2.3%**
Alcoholic Beverages: **+1.3%**
Perishable Food: **-0.4%**
Frozen Food: **-0.8%**
Ambient Food: **-2.3%**

What's not?
Home Care: **-15.9%**
Paper Products: **-9.2%**
Health & Beauty Aids: **-5.5%**
Health Care: **-4.2%**
Pet Food: **-3.8%**

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



MACRO TRENDS **NORWAY**

Norway Q2	C-store	Total market
Sales Euros	€438.7 million: **-3%** from year-ago quarter	€4.7 billion: **+3%**
Units	119.9 million: **-6.3%**	1.4 billion: **+1.1%**

What's hot?
Health Care: **+15.1%**
Non-Alcoholic Beverages: **+0.8%**
Home Care: **-0.5%**
Alcoholic Beverages **-2%**
Perishable Food: **-2.8%**

What's not?
Paper Products: **-8.5%**
Pet Food: **-7.6%**
Tobacco: **-5.6%**
Frozen Food: **-5.1%**
Health & Beauty Aids: **-4.8%**



MACRO TRENDS **PORTUGAL**

Portugal Q2	C-store	Total market
Sales Euros	€310.7 million: **-5%** from year-ago quarter	€3.1 billion: **+3.1%**
Units	171.1 million: **-8.3%**	1.5 billion: **+1.1%**

What's hot?
Health Care: **+18.7%**
Frozen Food: **+0.5%**
Alcoholic Beverages: **-1.8%**
Non-Alcoholic Beverages: **-3.3%**
Health & Beauty Aids: **-3.4%**

What's not?
Tobacco: **-15.5%**
Confectionery & Snacks: **-10.4%**
Paper Products: **-7.4%**
Ambient Food: **-6.8%**
Perishable Food: **-5.4%**

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

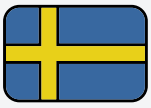


MACRO TRENDS **SPAIN**

Spain Q2	C-store	Total market
Sales Euros	€2.9 billion: **+7.9%** from year-ago quarter	€22.5 billion: **+4.1%**
Units	1.5 billion: **+7%**	10.7 billion: **+3.6%**

What's hot?
Health Care: **+27.4%**
Pet Food: **+13.7%**
Health & Beauty Aids: **+10.3%**
Tobacco: **+9.7%**
Perishable Food: **+9.3%**

What's not?
Paper Products: **+3.6%**
Home Care: **+4%**
Ambient Food: **+6%**
Confectionery & Snacks: **+6.8%**
Frozen Food: **+9%**



MACRO TRENDS **SWEDEN**

Sweden Q2	C-store	Total market
Sales Euros	€511.1 million: **-1.4%** from year-ago quarter	€5.6 billion: **-1.5%**
Units	178.9 million: **+2.5%**	2.2 billion: **+3.4%**

What's hot?
Health Care: **+8.5%**
Frozen Food: **+5.5%**
Health & Beauty Aids: **+2.9%**
Non-Alcoholic Beverages: **+2.3%**
Pet Food: **+1.7%**

What's not?
Ambient Food: **-5.3%**
Perishable Food: **-4.3%**
Confectionery & Snacks: **-4.2%**
Alcoholic Beverages: **-3.5%**
Tobacco: **-2.4%**

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

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

Q2 2026

NACS Research & Technology

Asia-Pacific

Across the 10 NIQ-measured Asia-Pacific countries/regions included in this report, six countries (China, the Philippines, South Korea, Taiwan, Thailand and Vietnam) had better convenience store value and unit growth in Q2 2026 compared to the total market. Convenience store value growth was the highest in Vietnam (+14%), followed by the Philippines (+12.6%), Thailand (+4.6%), Taiwan (+3.8%), Indonesia (+3.7%), Malaysia (+2.1%), South Korea (+1.5%), Hong Kong (+1.4%) and Singapore (+0.4%). Value sales declined only in China (-4.8%). Convenience store unit growth was the largest in Vietnam (+6.6%), followed by the Philippines (+4.5%), Thailand (+3%), Indonesia (+1.9%), Taiwan (+1.5%), South Korea (+0.2%) and Malaysia (+0.1%). Unit growth declined in Singapore (-7.2%), China (-3.1%) and Hong Kong (-0.2%).

In all but two of the 10 countries (China and South Korea), Q2 2026 inflationary pressures were greater in convenience stores than in the total market. Average unit prices experienced the biggest increase in Singapore (+8.2%), followed by the Philippines (+7.7%) and Vietnam (+7%). All remaining countries incurred low to negative inflationary pressures.

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 for the quarter.

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

Asia-Pacific: Growth Rankings

Q2 2026 – CONVENIENCE STORES

% Growth in Value

Vietnam	14.0%
Philippines	12.6%
Thailand	4.6%
Taiwan	3.8%
Indonesia	3.7%
Malaysia	2.1%
South Korea	1.5%
Hong Kong	1.4%
Singapore	0.4%
China	-4.8%

% Growth in Units

Vietnam	6.6%
Philippines	4.5%
Thailand	3.0%
Indonesia	1.9%
Taiwan	1.5%
South Korea	0.2%
Malaysia	0.1%
Hong Kong	-0.2%
China	-3.1%
Singapore	-7.2%

% Growth in Price

Singapore	8.2%
Philippines	7.7%
Vietnam	7.0%
Taiwan	2.2%
Malaysia	1.9%
Indonesia	1.7%
Hong Kong	1.7%
Thailand	1.6%
South Korea	1.3%
China	-1.8%

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	34.7 billion: -4.8% from year-ago quarter	390.7 billion: -8.9%
Units	4.3 billion: -3.1%	46.8 billion: -10%
Average unit price change	-1.8%	+1.2%

What's hot?
Liquor: -2.5%
Beverages: -3.0%
Skin Care: -3.0%
Staple Food: -3.8%
Dairy: -4.5%

What's not?
Hair Care: -9.1%
Oral Care: -7.9%
Snacks: -7.1%
Home Care: -6.3%
Other Personal Care: -5.9%



MACRO TRENDS **HONG KONG**

Hong Kong Q2	C-store	Total market
Sales HK dollars	1.8 billion: +1.4% from year-ago quarter	11.0 billion: +0.6%
Units	149.8 million: -0.2%	484.9 million: +0.0%
Average unit price change	+1.7%	+0.6%

What's hot?
Dairy: +9.2%
Liquor: +1.7%
Snacks: +1.6%
Home Care: -1.5%
Staple Food: -2.0%

What's not?
Skin Care: -26.9%
Other Personal Care: -5.1%
Oral Care: -4.2%
Beverage: -3.4%
Tobacco: -3.6%

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

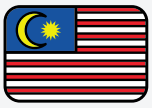


MACRO TRENDS **INDONESIA**

Indonesia Q2	C-store	Total market
Sales Rupiahs	54.8 trillion: **+3.7%** from year-ago quarter	89.1 trillion: **+5.0%**
Units	4.8 billion: **+1.9%**	35.7 billion: **+4.9%**
Average unit price change	**+1.7%**	**+0.1%**

What's hot?
Cologne: **+15.3%**
Mineral Water: **+14.9%**
Snacks: **+13.3%**
Liquid Milk: **+13.0%**
Skin Care: **+7.0%**

What's not?
Syrup: **-53.2%**
Carbonated Soft Drinks: **-16.1%**
Biscuit: **-15.4%**
Tea Ready-to-Drink: **-9.5%**
Baby Diapers: **-7.2%**



MACRO TRENDS **MALAYSIA**

Malaysia Q2	C-store	Total market
Sales Ringgits	688.2 million: **+2.1%** from year-ago quarter	9.1 billion: **-0.2%**
Units	186.6 million: **+0.1%**	1.3 billion: **+1.5%**
Average unit price change	**+1.9%**	**-1.7%**

What's hot?
Rice: **+15.3%**
Bottled Water: **+8.1%**
Gastro Upper Intestinal: **+6.6%**
Chocolate: **+6.2%**
Liquid Milk: **+3.1%**

What's not?
Air Freshener: **-14.0%**
Energy Drink: **-10.0%**
Spreads: **-5.9%**
Analgesics: **-5.2%**
Batteries: **-5.2%**

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



MACRO TRENDS **PHILIPPINES**

Philippines Q2	C-store	Total market
Sales Pesos	25.6 billion: **+12.6%** from year-ago quarter	558.8 billion: **+2.1%**
Units	565.2 million: **+4.5%**	21.5 billion: **-1.9%**
Average unit price change	**+7.7%**	**+4.1%**

What's hot?
Cigarettes: **+28%**
Milk: **+17.3%**
Beverages: **+15.6%**
Other Foods: **+11.8%**
Spreads: **+11.2%**

What's not?
Cooking/Culinary Aids: **-6.5%**
Household/Laundry Care: **-3.3%**
Dairy/Non-Dairy: **-2.2%**
Hair Care: **-1.8%**
Paper Products: **-0.8%**



MACRO TRENDS **SINGAPORE**

Singapore Q2	C-store	Total market
Sales SG dollars	191.3 million: **+0.4%** from year-ago quarter	1.2 billion: **+2.2%**
Units	46.7 million: **-7.2%**	251.9 million: **+1.7%**
Average unit price change	**+8.2%**	**+0.5%**

What's hot?
Tobacco: **+13.4%**
Alcoholic Beverages: **+9.9%**
Personal Hygiene: **-3.1%**
Health & Wellness: **-5.9%**
Grocery & Cooking Aids: **-6.8%**

What's not?
Hot Beverages: **-25.3%**
Body & Face Care: **-19%**
Laundry & Home Care: **-13.9%**
Hair Care: **-11.6%**
Paper Products: **-9.6%**

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



MACRO TRENDS **SOUTH KOREA**

South Korea Q2	C-store	Total market
Sales Won	3.5 trillion: **+1.5%** from year-ago quarter	7.3 trillion: **-4.8%**
Units	1.8 billion: **+0.2%**	2.1 billion: **-6.7%**
Average unit price change	**+1.3%**	**+2.0%**

What's hot?
Other Food: **+367.4%**
Processed Frozen Food: **+15.6%**
Paste: **+10.8%**
Sauce: **+10.5%**
Beverages: **+6.1%**

What's not?
Hair Care **-7.1%**
Other Non-Food: **-6.2%**
Detergents: **-5.5%**
Personal Care: **-5.5%**
Body Care: **-4.9%**



MACRO TRENDS **TAIWAN**

Taiwan Q2	C-store	Total market
Sales TW dollars	55.2 billion: **+3.8%** from year-ago quarter	97.3 billion: **-4.9%**
Units	1.2 billion: **+1.5%**	1.1 billion: **-6.0%**
Average unit price change	**+2.2%**	**+1.2%**

What's hot?
Muscle & Joint Topical Analgesic: **+286.8%**
Pudding: **+99.8%**
Frozen Vegetables: **+67.0%**
Eggs: **+44.0%**
Butter: **+43.7%**

What's not?
Ready-to-Drink Vinegar: **-65.2%**
Air Freshener: **-50.7%**
Disposable Warmers: **-50.1%**
Instant Food Pack: **-34.5%**
Household Cleanser: **-34.2%**

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



MACRO TRENDS **THAILAND**

Thailand Q2	C-store	Total market
Sales Baht	97.3 billion: **+4.6%** from year-ago quarter	179.7 billion: **+0.0%**
Units	3.4 billion: **+3.0%**	7 billion: **-0.0%**
Average unit price change	**+1.6%**	**-1.2%**

What's hot?
Toner: **+301.8%**
Facial Mask: **+48.6%**
Make-up Lip: **+43.9%**
Frozen Food: **+37%**
Functional Drink: **+35.9%**

What's not?
Cough Lozenge: **-0.3%**
Liquid Insecticide Refills: **-0.3%**
Baby Teat/Dummy & Bottle: **-0.3%**
Face & Body Cleanser: **-0.3%**
Coconut Milk: **-0.2%**



MACRO TRENDS **VIETNAM**

Vietnam Q2	C-store	Total market
Sales Dong	27.3 trillion: **+14%** from year-ago quarter	76.3 trillion: **+0.9%**
Units	1.0 billion: **+6.6%**	7 billion: **-2.0%**
Average unit price change	**+7.0%**	**3.0%**

What's hot?
Non-Alcoholic Beverages: **+26.9%**
Alcohol: **+26.9%**
Dairy: **+17.2%**
Hair Care: **+14.2%**
Skin Care: **+14.2%**

What's not?
Baby: **-15.5%**
Milk Powder: **-3.3%**
Biscuit/Pie/Snack: **+8.5%**
Instant Coffee & Tea: **+8.8%**
Personal Care: **+9.3%**

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

Convenience Store Performance Highlights: **Latin America**

NACS Research & Technology

Latin America

Across the nine NIQ-measured Latin American countries included in this report, all but Argentina had better convenience store Q2 2026 value and unit sales growth than the total market.

There was value sales growth in all nine countries, with the largest in Peru (+31.1%), followed by Argentina (+22.5%), Colombia (+16.7%), Brazil (+10.4%), Chile (+10.1%), Uruguay (+7.2%), Mexico (+6.4%), Costa Rica (+6.3%) and Panama (+2.6%). There was convenience store unit growth in seven of nine countries with the largest growth in Peru (+31.2%), followed by Colombia (+12.2%), Uruguay (+7.5%), Chile (+6.1%), Brazil (+4.8%), Costa Rica (+3.6%) and Panama (+2.3%). Unit sales were off 2% in Argentina and slipped 0.6% in Mexico.

In all but three of the nine countries (Argentina, Costa Rica and Uruguay), Q2 2026 inflationary pressures were greater in convenience stores than in the total market. Average unit prices experienced the biggest increase in Argentina (+25%), followed by Mexico (+7.1%), Brazil (+5.4%), Colombia (+4.1%), Chile (3.8%) and Costa Rica (+2.6%).

Across all nine Latin American countries, most "what's hot" categories experienced double-digit growth in Q2 2026. Edible categories dominated the list of "what's hot" categories in all countries. Many categories on the "what's not" list also recorded growth during the quarter, with 25 of the 45 categories growing versus 20 in decline. Edible categories likewise dominated the "what's not" lists in all countries.

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: Growth Rankings

Q2 2026 – CONVENIENCE STORES

% Growth in Value

Perú	31.1%
Argentina	22.5%
Colombia	16.7%
Brazil	10.4%
Chile	10.1%
Uruguay	7.2%
Mexico	6.4%
Costa Rica	6.3%
Panama	2.6%

% Growth in Units

Perú	31.2%
Colombia	12.2%
Uruguay	7.5%
Chile	6.1%
Brazil	4.8%
Costa Rica	3.6%
Panama	2.3%
México	-0.6%
Argentina	-2.0%

% Growth in Price

Argentina	25.0%
México	7.1%
Brazil	5.4%
Colombia	4.1%
Chile	3.8%
Costa Rica	2.6%
Panama	0.3%
Perú	-0.1%
Uruguay	-0.3%

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	932.1 billion: **+22.5%** from year-ago quarter	5.1 trillion: **+23.6%**
Units	383.1 million: **-2.0%**	1.5 billion: **-3.2%**
Avg. unit price change	**+25%**	**+27.6%**

What's hot?
LED TV: **+122%**
Liquid Soaps & Detergents: **+49%**
Common Cooking Oils: **+47.2%**
Ground & Whole Bean Coffees: **+42.0%**
Yogurt: **+40.5%**

What's not?
Bottled Wine: **+4.7%**
Refrigerated Adult Milk: **+11.5%**
Canned Fish Products: **+11.7%**
Butter: **+13.3%**
Traditional Yerba Mate: **+13.8%**



MACRO TRENDS **BRAZIL**

Brazil Q2	**C-store**	**Total market**
Sales Reales	1.5 billion: **+10.4%** from year-ago quarter	185.9 billion: **+4.9%**
Units	168.8 million: **+4.8%**	19.6 billion: **+0.9%**
Avg. unit price change	**+5.4%**	**+4.0%**

What's hot?
Energy Drinks: **+31.6%**
Other Bread: **+27%**
Chewing Gum: **+15.2%**
Mineral Water: **+13.5%**
Local Consumption: **+13.1%**

What's not?
Pasty & Delicatessen: **-12.6%**
Ice Cream: **+0.2%**
Chocolates: **+2.4%**
Beer: **+4.6%**
Salty Snacks: **+6.1%**

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	208.2 billion: **+10.1%** from year-ago quarter	5.6 trillion: **+2.9%**
Units	140.8 million: **+6.1%**	2.5 billion: **+1.5%**
Avg. unit price change	**+3.8%**	**+1.3%**

What's hot?
Tobacco Products: **+41.4%**
Water: **+18.5%**
Carbonated Soft Drinks: **+10.4%**
Cigarettes: **+10.0%**
Chewing Gum: **+9.4%**

What's not?
Hot Dogs: **-41.6%**
Sweet Bakery: **-17.9%**
Frozen Prepared Meals: **-10.5%**
Coffee: **-10.2%**
Chocolates: **+3.4%**



MACRO TRENDS **COLOMBIA**

Colombia Q2	C-store	Total market
Sales Pesos	12.1 trillion: **+16.7%** from year-ago quarter	20.1 trillion: **+12.9%**
Units	2.3 billion: **+12.2%**	2.9 billion: **+9.5%**
Avg. unit price change	**+4.1%**	**+3.1%**

What's hot?
Tobacco: **+42.3%**
Water: **+40.3%**
Fruit: **+34.8%**
Dairy Beverages: **+32.5%**
Vegetables: **+26.5%**

What's not?
Rice: **-4.9%**
Pork: **+0.6%**
Chicken: **+2.2%**
Oils: **+5.3%**
Chicken Eggs: **+6.7%**

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 **COSTA RICA**

Costa Rica Q2	C-store	Total market
Sales Colones	214.4 billion: **+6.3%** from year-ago quarter	837.1 billion: **+0.9%**
Units	208.3 million: **+3.6%**	774.9 million: **-1.7%**
Avg. unit price change	**+2.6%**	**+2.7%**

What's hot?
Isotonic Drinks: **+30.5%**
Energy Drinks: **+22.1%**
Hydration Solutions: **+19.4%**
Flavored Alcoholic Beverages: **+18.5%**
Soft Drinks: **+17.6%**

What's not?
Rice: **-22.5%**
UHT Milk: **-5.7%**
Pet Food: **-5.5%**
Liquors: **-5.4%**
Canned Tunas: **-4.3%**



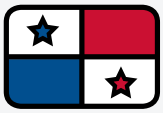
MACRO TRENDS **MEXICO**

Mexico Q2	C-store	Total market
Sales Pesos	103.1 billion: **+6.4%** from year-ago quarter	546.3 billion: **+4.0%**
Units	3.1 billion: **-0.6%**	19 billion: **-2.3%**
Avg. unit price change	**+7.1%**	**+6.5%**

What's hot?
Coolers: **+46.0%**
Cigarettes: **+18.2%**
Energy Drinks: **+17.5%**
Packaged Sweet Bread: **+11.1%**
Beer: **+8.6%**

What's not?
Sport Drinks: **-13.8%**
Electrolyte Drinks: **-6.1%**
Infant Formula: **-5.9%**
Disposable Diapers: **-3.3%**
Body & Facial Care: **-2.5%**

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 **PANAMA**

Panama Q2	C-store	Total market
Sales U.S. dollars	258.2 million: **+2.6%** from year-ago quarter	556 million: **-0.0%**
Units	303.2 million: **+2.3%**	584.8 million: **+1.5%**
Avg. unit price change	**+0.3%**	**-1.5%**

What's hot?
Roasted Coffee: **+21.3%**
Purified Water: **+19.2%**
Soft Drinks: **+13.4%**
Snack Food: **+12.6%**
Feminine Hygiene: **+8.3%**

What's not?
Beer: **-2.8%**
Juice & Nectar Beverages: **-0.7%**
Laundry Detergents: **-0.6%**
Prepared Soup: **+0.7%**
Isotonic Drinks: **+1.5%**



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

Peru Q2	C-store	Total market
Sales Soles	599 million: **+31.1%** from year-ago quarter	7 billion: **+11.3%**
Units	146.2 million: **+31.2%**	827.2 million: **+13.1%**
Avg. unit price change	**-0.1%**	**-1.6%**

What's hot?
Industrial Ice Cream: **+73.5%**
Mineral Water: **+60.1%**
Impulsive Ice Cream: **+55.9%**
Isotonic Juices: **+54.7%**
Carbonated Soft Drinks: **+54.6%**

What's not?
Fine Wine: **+5.7%**
Chocolates: **+9.1%**
Cigarettes: **+17.1%**
Cookies: **+22.4%**
Other: **+25.9%**

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	4.1 billion: **+7.2%** from year-ago quarter	31.2 billion: **+6.4%**
Units	40.4 million: **+7.5%**	246.4 million: **+6.1%**
Avg. unit price change	**-0.3%**	**+0.3%**

What's hot?
Chocolate-Coated Sandwich Cookies: **+21.8%**
Yogurt: **+21.3%**
Bottled Water: **+16.6%**
Snacks: **+14%**
Beer: **+12.7%**

What's not?
Dry Pasta: **-1.1%**
Sweet Biscuits: **+0.1%**
Whisky: **+0.7%**
Cooking Oil: **+0.9%**
Ready-to-Drink Juices: **+0.9%**

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

NACS
Advancing Convenience & Fuel Retailing

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**.

NIQ

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 2026

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	• 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	• 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	• Modern Trade, Four CVS banner in Taiwan: 7-Eleven, Family Mart, Hi Life and OK	New Taiwan dollar
	South Korea	Convenience	• 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
	Philipines	Convenience and Gas Station CVS		Philippine peso
	Vietnam	Convenience and Gas Station CVS	• Modern Trade, Including Super/Hypermarket, Convenience Store, Minimart, Health & Beauty and independent MT stores (excluding Mom & Baby chain)	Vietnamese dongs
	Indonesia	Convenience and Gas Station CVS	• Modern trade with selling area 50-300 sq. meters, Number of Checkouts: 1-4	Indonesian rupiah
	Singapore	Convenience and Gas Station CVS	• 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	• 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	• 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	• Store that sells Petrol Gas and has other CPG offerings (Excluding Tesco). Ex. Costcutter, Circle K, Centra	
	Poland	Petrol	• An outlet selling fuels and very often car accessories. It can handle food and chemical/ cosmetic products	
	Norway	Petrol	• Superettes <400 sq. meters and Petrol Stations (excl Esso)	
	Denmark	Petrol	• Superettes with selling area <400 sq. meters, Petrol Stations & Tobacco Kiosk	
	Sweden	Convenience	• Superettes with selling area <400 sq. meters, Petrol Stations & Tobacco Kiosk	
	Netherlands	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters and Petrol Stations	
	Italy	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters	
	Spain	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters and Petrol Stations	
	Austria	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters	
	Belgium	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters	
	Germany	Convenience	• Superettes with selling area <400 sq. meters, Petrol Stations and Tobacco Kiosk	
	Denmark	Convenience	• Superettes with selling area <400 sq. meters, Petrol Stations and Tobacco Kiosk	
	Sweden	Convenience	• Traditional stores and Superettes with selling area <400 sq. meters	
	Portugal	Convenience	• 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	• All convenience stores <400 sq. meters selling area • Includes Petrol Stations, Traditional Trade (Independents) and all Supermarket c-stores.	Euros
	France	Convenience	• 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	• 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	• Convenience market of Honduras includes c-stores and minimarkets • Only beverages are measured in this channel	HNL (Honduran lempira)
	Mexico	Proximity	• Proximity market in Mexico includes c-stores, express self-service stores, minimarkets and chain pharmacies with minimarkets	MXN (Mexican peso)
	Panama	Convenience and minimarkets	• Includes c-stores and minimarkets	US Dollars
	Peru	Convenience	• C-stores are only measured in Lima, Peru	PEN (Peruvian sol)
	Uruguay	Convenience		UYU (Uruguayan peso)
North America	United States	Convenience	• 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	• 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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1600 Duke Street | Alexandria VA 22314-3436 | convenience.org