

2025

UK Convenience & Wholesale Market Report

Brochure



How to use this report



Report section:	Market & Competitive Landscape	Shopper Insight	Retailer attitudes to wholesale	Future Outlook
Relevant teams	Commercial, finance, data and insight, holding company, board	Brand, creative, data and insight and marketing	Brand, creative, data and insight and marketing	Commercial, finance, data and insight, holding company, board
Operator Questions answered	What does the market look like and how will changes impact my business case and forecast? What are possible gaps that can be capitalised on?	What are shopper motivations? What are the opportunities to be exploited?	How are retailers interacting with the wholesale channel and should I be looking to follow suit with any trends in the market?	How will the market change across the next three years and what are the threats and opportunities?
Supplier/ Wholesale Questions answered	What does the market look like and how will changes impact my customers? What factors will need to be priorities for supporting customers?	How are retailers having to adapt to deliver against changing shopper needs? What can we do to support our customers?	How should we be adapting to deliver against changing customer needs? What can we do to support our customers?	How will the market change across the next three years and what are the threats and opportunities?
Investor Questions answered	What is the landscape and the opportunity for growth in the market?	What are key shopper behaviours and considerations that a prospect needs to be prioritising?	What are key retailer behaviours and considerations that a prospect needs to be prioritising?	How will the market change across the next three years and what are the threats and opportunities?

Source: Lumina Intelligence, June 2025

Report Introduction

The **Lumina Intelligence UK Convenience & Wholesale Market Report 2025** delivers essential insight into a channel experiencing renewed momentum, structural shifts, and rising competition. As top-up and food-to-go missions evolve and retailer propositions diversify, this report provides a data-led assessment of the trends, behaviours and dynamics shaping a £48.8bn market.

The report examines **market performance, fascia expansion, and trading conditions** across symbols, independents, multiples and forecourts. It explores **category evolution**, store investment trends, and the adoption of **digital and fulfilment solutions**.

Retailer and shopper behaviours are unpacked in detail, highlighting priorities around **value, loyalty, health, convenience, and mission relevance**.

Looking forward, the report offers **market value projections to 2028**, alongside key enablers such as store refits, destination services, loyalty programmes and own-brand premiumisation. Backed by Lumina Intelligence's market-leading tracking programmes, the **UK Convenience & Wholesale Market Report 2025** is an indispensable tool for stakeholders across the UK convenience channel.



Sample Slides



New and upcoming changes in legislation are impacting FMCG businesses in the UK



Extended Producer Responsibility (EPR)

Coming in from 1 April 2025 - with first bills from October - this policy will make eligible businesses accountable for the cost of managing their packaging waste. Eligible businesses are those who place 25 tonnes on the market and turnover +£1m.



Disposable/single use vapes ban

From 1 June 2025 it is illegal for businesses to sell or supply single-use vapes, applying to sales online and in shops. Lumina Intelligence's new Vape Consumer Monitor showcases how this ban is impacting convenience retail - threatening consumer spend but offering opportunities in alternative categories.



Soft Drinks Industry Levy (SDIL)

Announced in the Autumn 2024 budget, both the lower and higher rates of the SDIL will increase each year over the next 5 years to reflect the 27% CPI increase from 2018-2024 alongside increasing with CPI each year from April 2025.



HFSS

HFSS volume price promotion restrictions are expected to come into effect from 1 October 2025. There will be new rules around advertising for HFSS products on TV and online from January 2026.



Deposit Return Scheme

Implementation is scheduled to launch in England and Northern Ireland from October 2027.

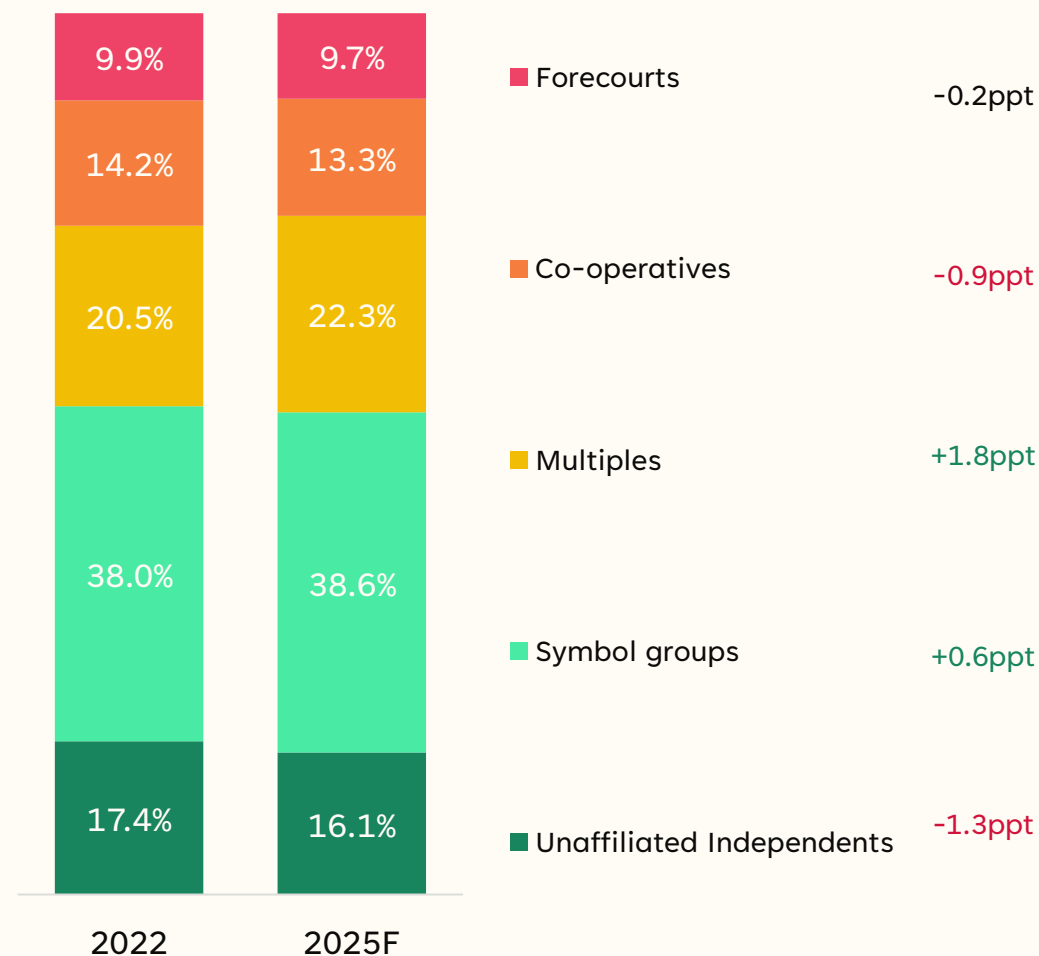
Source: Lumina Intelligence, FWD, conveniencestore.co.uk, June 2025

Multiples are gaining market share through revitalised interest and investment in the channel

Multiples are forecast to account for 22.3% of the convenience market value in 2025F – up +1.8ppts versus 2022. The opportunities within the convenience format around travel locations, food to go and fresh & chilled have attracted more multiple operators to the channel including Morrisons and ASDA, whilst Tesco and Sainsbury's continue to focus on the sector as a driver of overall grocery growth.

Symbol groups are set to account for the largest share at 38.6% of the convenience market value in 2025F – up +0.6ppts. Symbol retailers continue to innovate with store renovations increasing space for destination categories to differentiate.

Segment share of convenience market value, 2022-2025F



Source: Lumina Intelligence Market Sizing Insight & Analysis, June 2025

Consumers limit basket size to manage spend

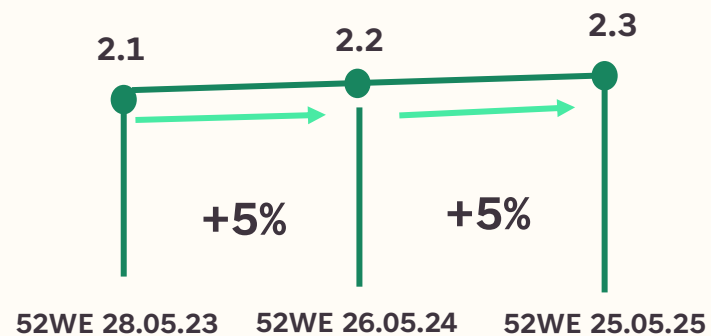
Consumers are steadily visiting Convenience stores more regularly, as retailers invest in different missions, giving consumers more reasons to visit. However, cost-consciousness remains front of mind and consumers manage their spend by buying fewer items per trip. Despite this, inflation and trading up means that basket spend declines at a slower rate to basket size.

Key Metrics – Total Convenience



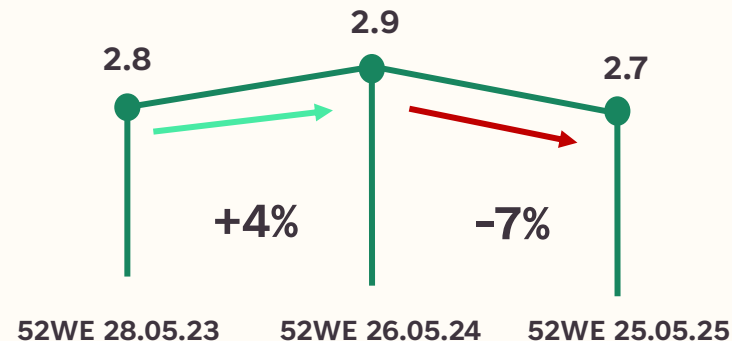
Visit Frequency

Average visits per consumer
in the past 7 days



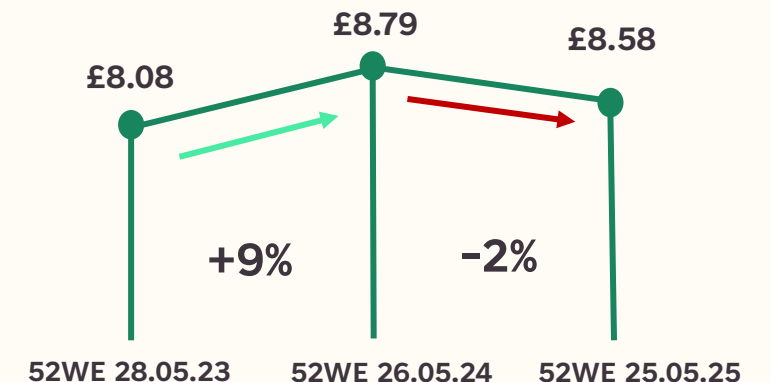
Basket Size

Average number of items purchased per visit



Average spend

Average spend per person per visit



Source: Lumina Intelligence Convenience Tracking Programme, data collected 52WE 28.05.23, 52 WE 26.05.24, 52 WE 25.05.25

Meet the Lumina Intelligence Clusters



In Need Neighbours

35%
of shoppers

Older families and post families, visiting neighbourhood stores for newspapers and distress top up



Time Poor Transient Families

31%
of shoppers

Affluent younger families visiting stores in urban locations for quick fix meal solutions



Young, Free Treaters

20%
of shoppers

Young shoppers living alone or with parents seeking treats and to go options for themselves



Routine Retirees

14%
of shoppers

Older consumers living alone visiting neighbourhood stores for newsagent missions and to top up

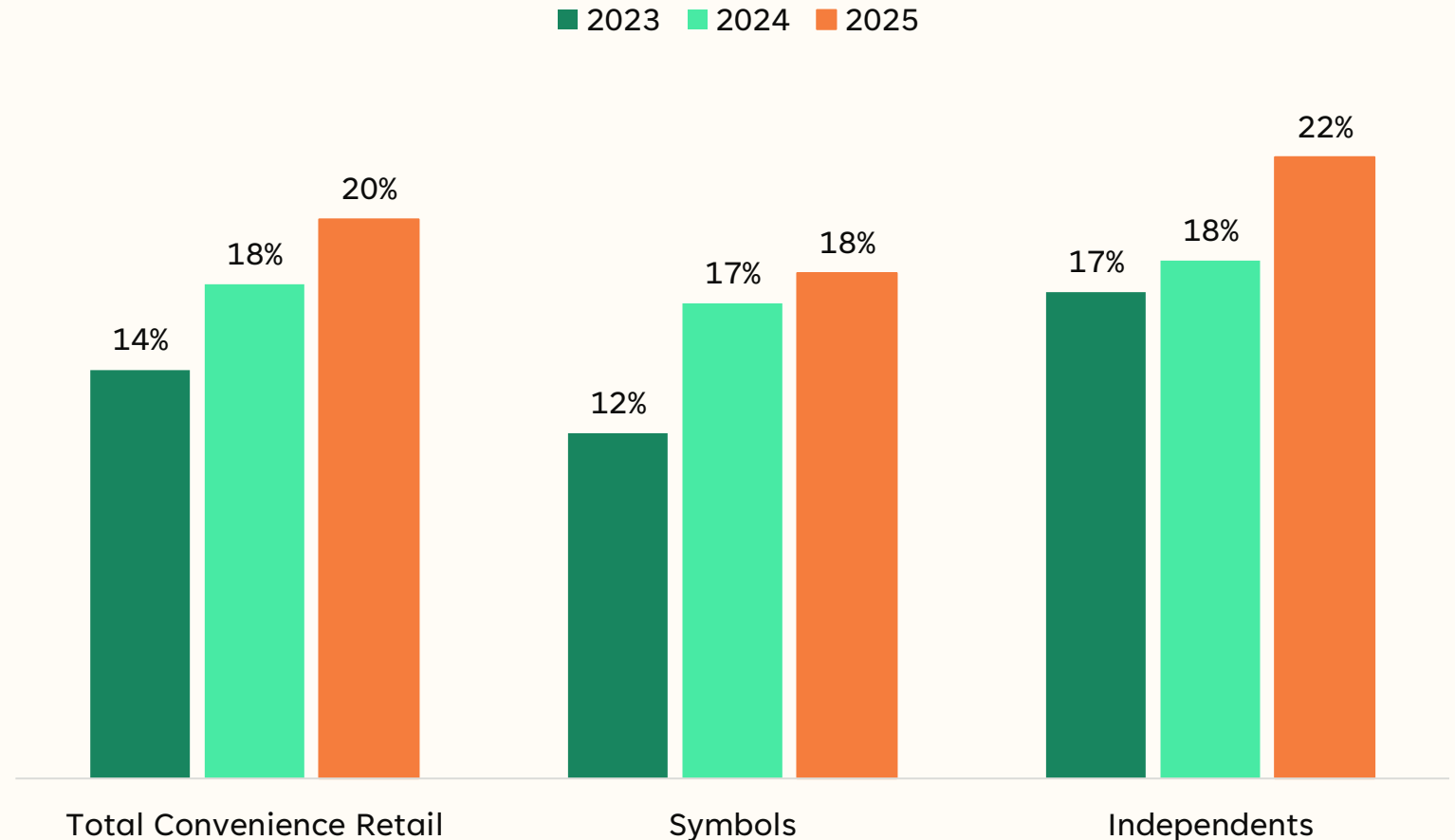
Source: Lumina Intelligence Convenience Tracking Programme, data collected 52 WE 27.04.25



S&I retailers pause investments as cost pressure mounts

One in five retailers have delayed investment—a 2ppt rise—highlighting that lower interest rates aren’t enough to offset broader financial pressures. This has been an ongoing trend since 2023, as financial hardship continues and legislation looms (DRS). Anticipated costs from the EPR scheme are adding to the strain. Wholesalers play a critical role in easing this burden—offering price competitiveness and promotions, advisory support to navigate regulatory changes, and enhanced delivery infrastructure to help reduce operational costs.

Q. Have you postponed planned investment or development to your business lately? – “Yes”



Source: Lumina Intelligence Retailer Attitudes & Behaviours Study, June 2024 vs June 2025



Convenience market: 2025F-2028F trends

Convenience market trends including destination offers and services, technology, demonstrating value and fresh and chilled are expected to be at the centre of strategies for growth across the coming three years.

Development expectations, 2025F-2028F



Destination offers and services including local butchery counters, gardening/plant areas and specialist BWS areas are expected to gain momentum.



AI will continue to evolve and place even more emphasis on **technology** – through age recognition and instore/forecourt crime prevention.



Promotions will be a key focus for retailers to showcase **value and build loyalty** - to boost purchases through creative in-store activations, displays and PMPs. Especially after extended HFSS legislation lands on volume deals.



Re-configurations of store layouts to allow for larger and broader ranges of **fresh and chilled** categories and key missions including **meal for tonight and food to go**.

Source: Lumina Intelligence, June 2025

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The evolution of categories such as food to go, soft drinks, and own-label

The future role of convenience in the wider UK retail and grocery ecosystem

Report Details



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please get in touch using the contact details provided below.**

Get in touch

Ed Sibley

Commercial Director

ed.sibley@wrbm.com



www.lumina-intelligence.com