Lumina Intelligence

2026

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 2026

Report Introduction

The **Lumina Intelligence UK Convenience Market Report 2026** delivers essential insight into a diverse channel experiencing legislative modifications, structural shifts, and rising competition from the hospitality sector.

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 2029**, alongside key enablers such as store refits, destination services, loyalty programmes and health preferences for consumers. Backed by Lumina Intelligence's market-leading tracking programmes, the **UK Convenience Market Report 2026** 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

Past | **Upcoming**

Past

EPR (April 2025 to 2026 rollout)

Packaging EPR introduced in 2025 with costs now materialising, increasing supplier cost bases and driving price inflation across FMCG.

HFSS (October 2025 to 2026 rollout)

Restrictions on multibuys and promotions limit impulse purchase drivers, particularly in snacking.

Plastic Packaging Tax increase (April 2026)

Rising plastic packaging tax adds further cost pressure alongside EPR, and reinforcing the shift to lighter, recyclable materials.

Disposable vapes ban (June 2025)

Removal of single-use vapes has eliminated a high-frequency impulse category, creating a short-term sales gap for convenience while accelerating shifts into alternative nicotine products.

Soft Drinks Industry Levy (2025 onwards)

Ongoing levy increases are driving price inflation in sugary drinks, supporting a shift towards low/no sugar alternatives.

Upcoming

Vaping Product Duty (October 2026)

New excise duty on vaping liquids will increase retail pricing, further reducing demand in an already disrupted category and creating additional pressure on convenience sales.

U16s energy drinks ban in England (TBC)

A ban is planned in England to stop under 16s buying energy drinks. Up to a third of UK children are thought to consume these types of drinks every week,

Tobacco & Vapes Act (2027 rollout)

Introduction of a “smoke-free generation” will structurally reduce tobacco demand over time, impacting one of the largest and most consistent revenue streams in convenience.

Deposit Return Scheme (expected 2027)

Implementation of a deposit scheme will increase operational complexity in-store, impacting space, staffing and checkout processes.

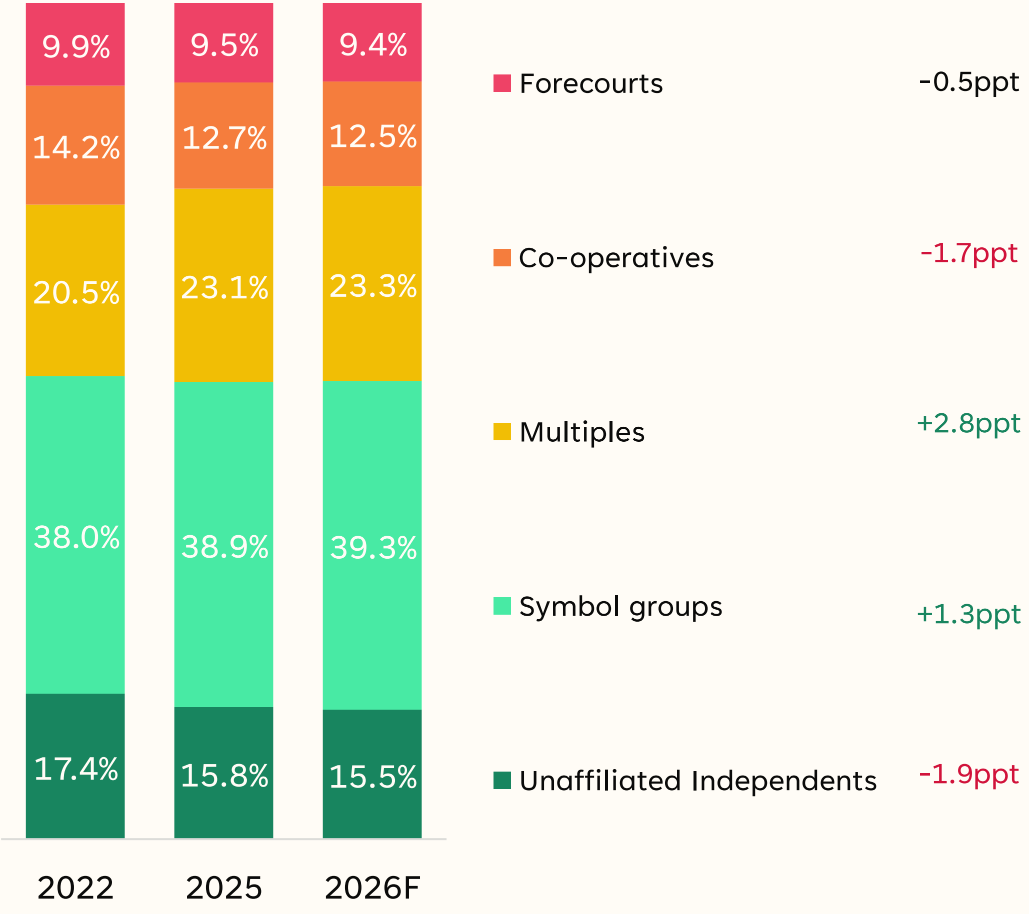
Source: Lumina Intelligence, conveniencestore.co.uk, The Grocer, BBC News, June 2026

Multiples continue to gain market share through estate expansion and investment in the channel

Multiples are forecast to account for 23.3% of the convenience market value in 2026F – up +2.8ppts versus 2022. The opportunities to expand estates within the convenience format continue to attract multiple operators, with Tesco and Asda set to drive growth in 2026. However, Morrisons, who have been rapidly expanding in the last few years, are set to close stores in 2026 due to cost pressures.

Symbol groups are set to retain the largest share of the market at 39.3% of the convenience market value in 2026F – up +1.3ppt versus 2022. Symbol retailers continue to innovate with store renovations and estate expansions too.

Segment share of convenience market value, and ppt share difference 2022-2026F



Source: Lumina Intelligence Market Sizing Insight & Analysis, June 2026

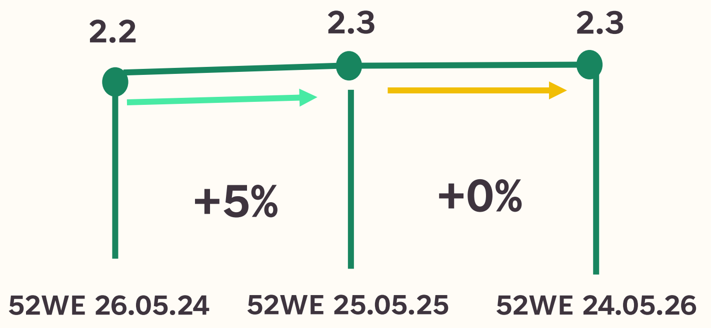
Consumer spending dampened due to cost of living

Rising costs and squeezed budgets has resulted in a 1% decline in spend year-on-year as consumers look to limit discretionary spending to save money. However, consumers are learning to live with the challenging economic climate as frequency and basket size are stagnant YoY, indicating a step in the right direction compared to the declines of the year before.

Key Metrics – Total Convenience

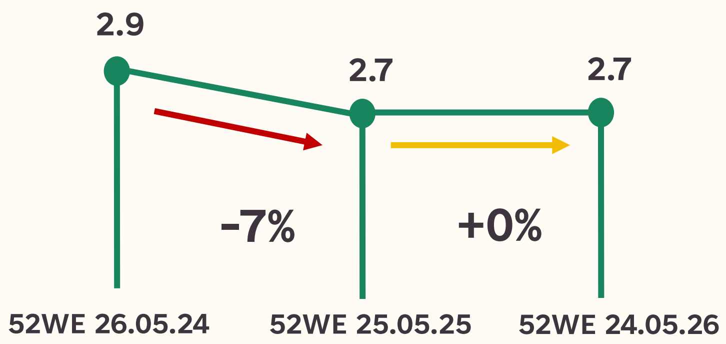
Visit Frequency

Average visits per consumer in the past 7 days



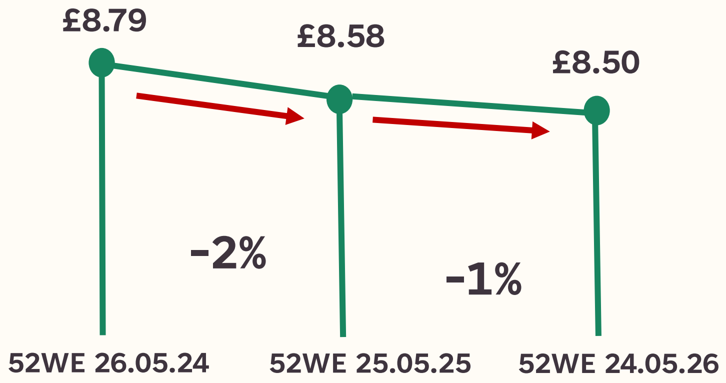
Basket Size

Average number of items purchased per visit



Average spend

Average spend per person per visit



Source: Lumina Intelligence Convenience Tracking Programme, data collected 52WE 22.05.24, 52 WE 25.05.25, 52 WE 24.05.26

The Lumina Intelligence Clusters

Neighbourhood Top-Up Families

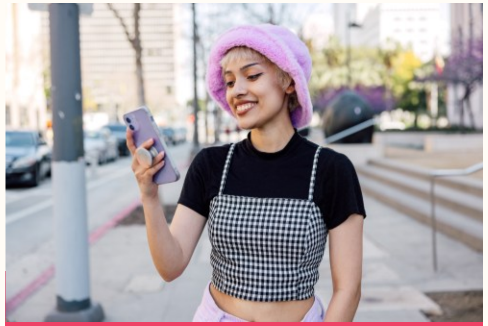
35%
of shoppers

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

Grab-and-Go Families

33%
of shoppers

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



Urban Treat Hunters

18%
of shoppers

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

Routine Retirees

14%
of shoppers

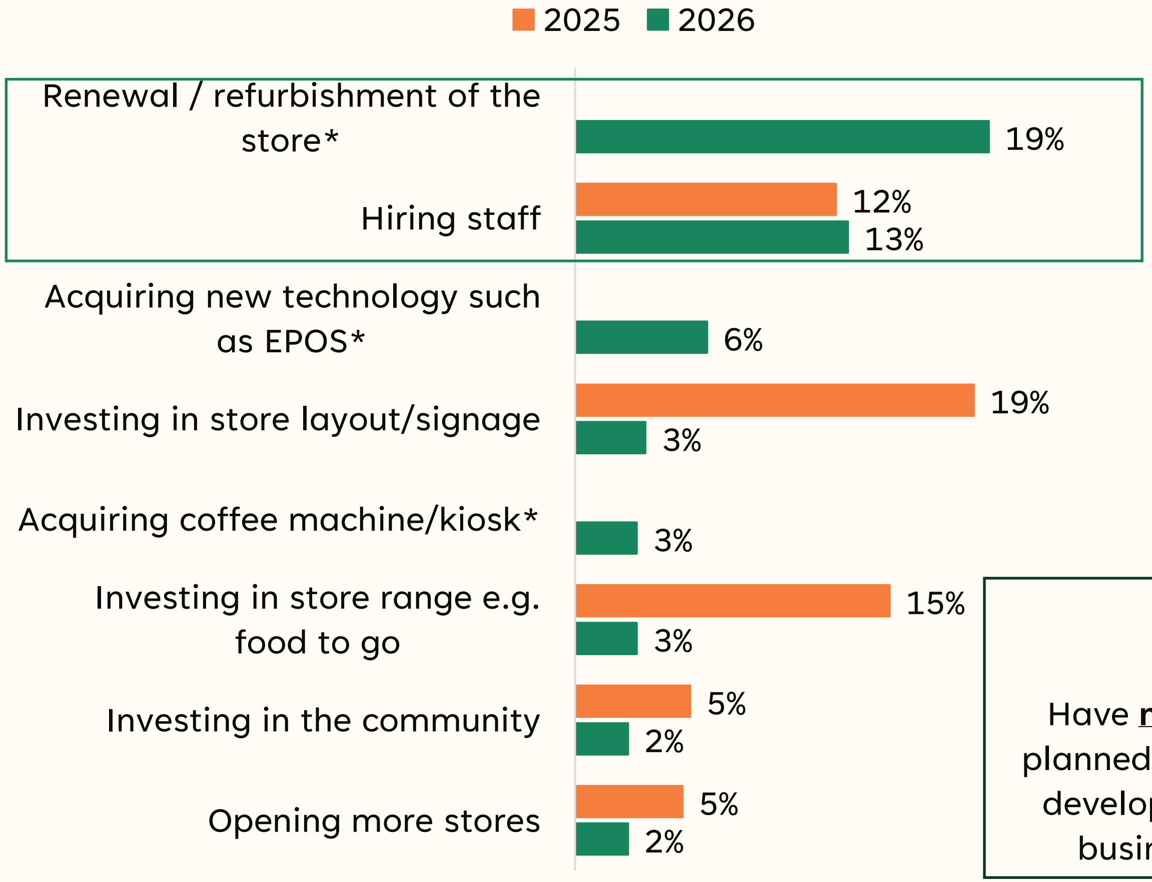
Older consumers living alone visiting neighbourhood stores for newsagent missions and to top up

Source: Lumina Intelligence Convenience Tracking Programme, data collected 52 WE 24.05.26

Retailers refocus investment on high-return priorities

Despite ongoing uncertainty, most retailers have maintained planned investment, reflecting greater confidence in the year ahead. Spend has been refocused on high-return areas, particularly store refurbishments and staffing. This shift signals a more pragmatic mindset, with retailers prioritising initiatives that directly support footfall, operational efficiency and the in-store experience, rather than discretionary or longer-term projects.

Q. What type of investment have you implemented in the last 12 months? *(Top 8)*



61%

Have **not** postponed planned investments or development to their business in 2026

Source: Lumina Intelligence Retailer Attitudes & Behaviours Study, June 2025 vs June 2026

* Some data points are missing across years due to survey updates

Convenience market: 2026F-2029F trends

Convenience market trends including destination offers and services, technology, demonstrating value and store reconfigurations are expected to be at the centre of strategies for growth up to the end of the decade.

Development expectations, 2026F-2029F

Destination offers and services including specialist in-store areas, seasonal offers and new services (e.g. key-cutting) are expected to gain momentum.

Harnessing AI and **embracing new technologies** will be key for the trade and brands. Allowing for dynamic pricing for 'yellow ticket items' and differing promotions during the day.

Retailers showcasing **value for money** will win with shoppers creative in-store and online (delivery) activations and Price Marked Packs.

Reconfigurations of store layouts to allow for broader ranges, DRS units, self-serve areas and key missions like **food to go** will keep the convenience trade highly relevant during a time when the face of soft drinks and nicotine could be transformed by new laws.

Source: Lumina Intelligence, June 2026

Extended Table of Contents

Report Details

Format

Electronic PDF

Pricing

£3,450

Publication

June 2026

Access

Corporate Access

Lumina Intelligence

To learn more about how Lumina Intelligence can support you, please get in touch using the contact details provided below.

Get in touch

Laura De Forest-Brown

Commercial Director

Laura.Deforest-Brown@wrbm.com

www.lumina-intelligence.com