

The State of Convenience

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NIQ

C360
Envision *what's possible*

Agenda

- 1 How is Convenience Evolving
- 2 Global Recap of 2023
- 3 Why believe?
- 4 Forward trends

Global Retail Best Practice

Fueling to Fast Charging

Same but different



- EV-only sites
- EV customer needs
- The theatre of fueling

From Fuel to Food

A fundamental shift



- Gas station perception
- Sustainability
- Healthy options

Fueled by Technology

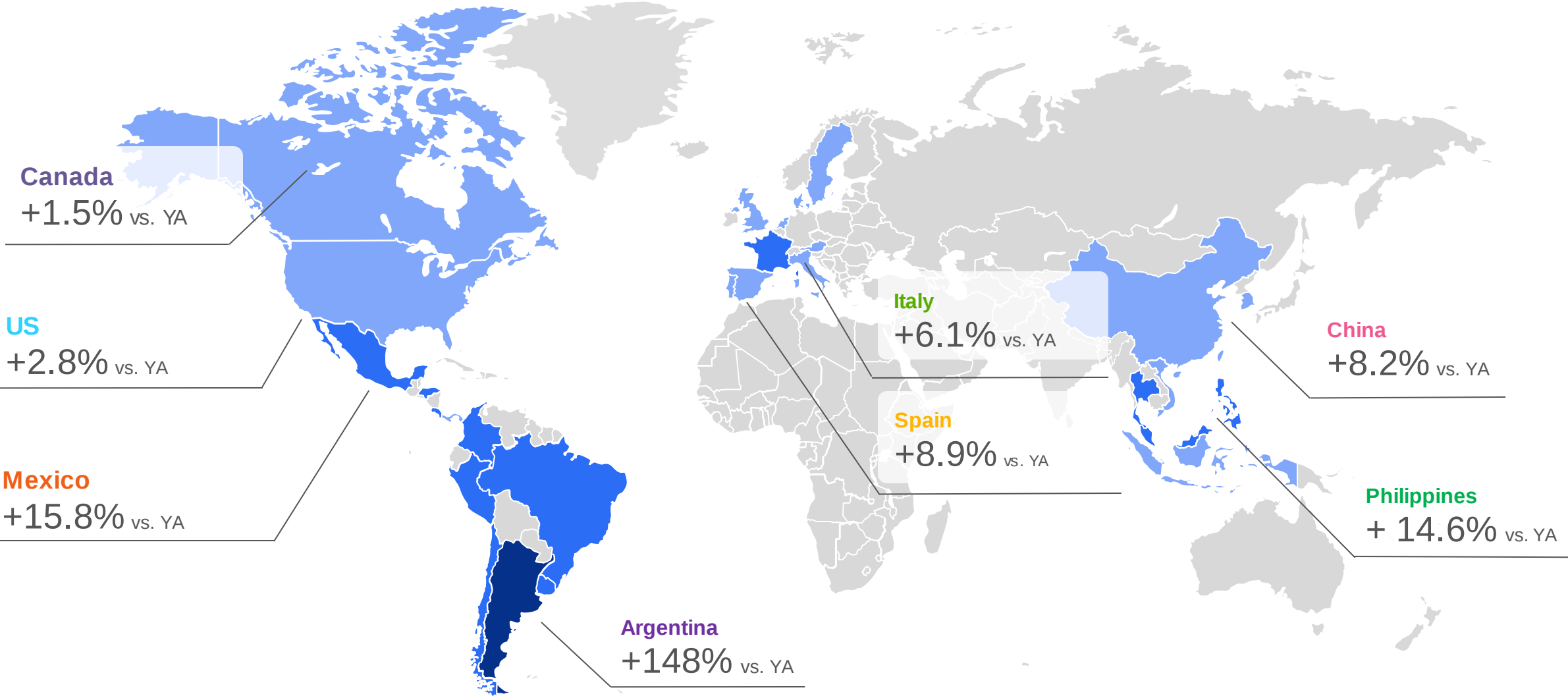
In every part of our business



- Hyper-personalization
- Autonomous
- Retail Media

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Ikea: NACS Oslo store tours, Adnoc: NACS Convenience Leaders Exchange 2023 Abu Dhabi, GS25: NACS Convenience Summit Asia 2024

Majority of countries experiencing YOY growth



NIQ Retail Measurement Service, Local Country Currency and Product Definitions, Nominal Local Currency Value (%) vs. Growth vs. Year-Ago Rankings

< 0% 0% - 10% 10% - 100% >100%

Why Believe? - 165 Million Transactions

Total Sales

Convenience makes up 16% of all CPG sales in the US

Convenience is 3X the size of the Drug Channel



Beer

Convenience is the largest Beer seller by far

C-Stores sell almost 2X as much Beer as the Grocery Channel



Packaged Beverage

Convenience is the 2nd channel in dollar sales

Convenience is the 1st channel in unit sales



Candy

Convenience is the largest seller of Non-Seasonal Candy



NIQ Discover 52 weeks WE 4/13/24, NIQ TD Linx 2022 vs. 2023

U.S. C-Store Trends

4 of the 5 Foodservice Categories Make Up the Top 10 Categories in the Store

Prepared Food  \$51,500 +12.2% Sales YoY Change	Cigarettes  \$44,765 -4.2%	Pkg. Beverage  \$40,339 +7.9%	Beer  \$18,078 +2.2%	OTP  \$16,844 +6.9%
Salty Snacks  \$10,390 +9.2% Sales YoY Change	Candy  \$8,241 +8.2%	Hot Disp.  \$6,324 +5.1%	Cold Disp.  \$5,233 +9.4%	Commissary  \$4,260 +6.0%

“My Favorite Restaurant Served Gas”

Fueling customers continues to Expand and Evolve

Fast Food Club

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7-Eleven Expands Its Food and Drink Offerings

Story by Owen Garfield • 1d • 3 min read



7-Eleven Inc. is planning to **expand its food and operating income by \$113 million**, a 4% rise from discussed the company's aims during a financial re

Circle K Aims to Grow Its Fresh Food Business in North America

The convenience retailer looks to its smaller European division for inspiration.

September 26, 2022



ALEXANDRIA, Va.—Circle K is focusing on in

CSN EXCLUSIVE: Murphy USA Invests in Foodservice Success

The convenience retailer is adding to its team and taking a people-first approach to the category.



Angela Hanson4/22/2024

EL DORADO, Ark. — When Murphy USA Inc. acquired QuickChek Corp. in 2021, it was no secret that the Whitehouse Station, N.J.-based



Sheetz Food Menu – Delicious Choices

by Sean Taylor | Feb 21, 2023 | Gas Station Food



When thinking of gas station food, you probably don't get too excited. The Sheetz food menu is not your average gas

Behind the scenes. What's Happening

Introducing Casey's First-Ever Chief Pizza & Beer Officer

Updated on March 4, 2024 | February 9, 2024

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Wawa Recognized Among the Fastest Growing Brands by Yelp

Story by Geo Sandler • 6d • 3 min read

Yelp has just released a list of the **50 fastest-growing brands** to recognize companies that have effective growth strategies over the past year. The convenience store **Wawa** stood out among them **ranking fifth overall**. Wawa's grab-and-go food options made them popular and resulted in an **88% increase in consumer interest** across the nation. The growth was especially prominent in **Virginia, Florida, and New Jersey**, seeing a surge of **137% in customer attention**. This list was compiled considering factors like new store openings, consumer interest, and search patterns.



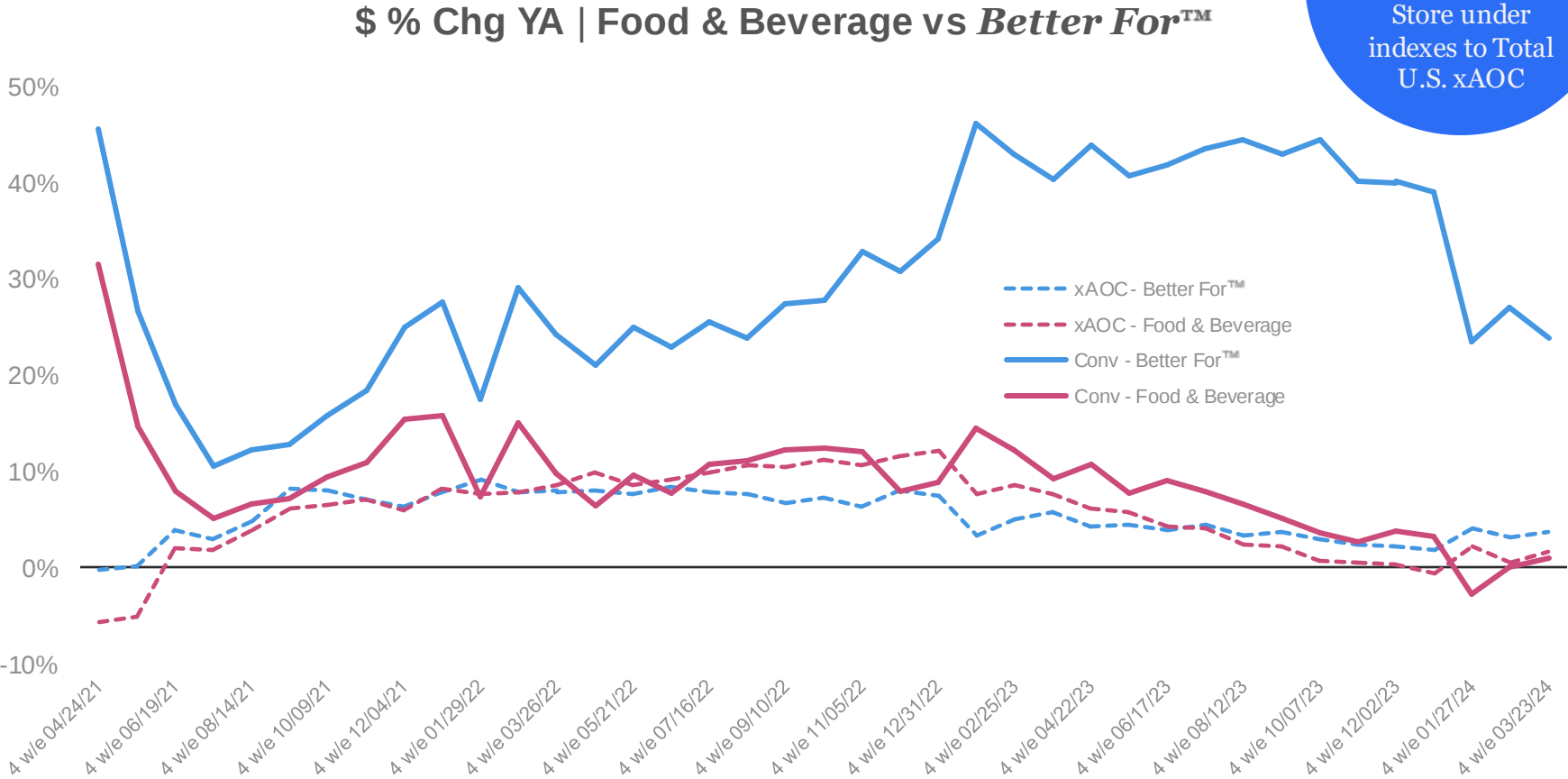
NIQ *Better For™* ...



Inflation Impacted *Better For™* Trends In The Past Year

Trend has shifted back and outpacing conventional Products

40 index*
Better For™
in Convenience
Store under
indexes to Total
U.S. xAOC



*Index = Better For™ share of Total Convenience Store compared to Better For™ share of to Total US xAOC

NIQ, Retail Measurement Services – NIQ Product Insight, powered by Label Insight;
Total US xAOC vs Total US Conv; Total Food & Beverage vs Better For Segment™; \$ % Change vs year ago; 4-week trended through week ending March 23, 2024

*"Fuel drove customers in the past,
the store will drive them in the future"*

- Dr. Henry Armour

Traditional Stores



Stand-Alone
Coffee Stores



EV-Only Stores



Integrated Mobility Site



Source: Shell

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Have questions or need additional information?

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