Convenience Q1 2026

Talysis™

MAKING LIFE EASIER

Introduction

Talysis exists to help businesses unlock the power and potential of data. We offer the only end to end solution within the UK convenience and wholesale sector, providing tools for every element of the supply chain. Our wide range of services includes focused solutions, that help businesses to sell more, more profitably. We're proud to work with some of the biggest names in retail & manufacturing across the UK and Ireland.

Our Data Sources

Clarity by Talysis
The UK's most robust convenience insight platform. Clarity transforms weekly EPoS data from 1000s of independent and symbol stores into clear, dependable insight. It is updated weekly, only four days in arrears and provides full barcode and transactional insight into the UK convenience channel.

Fast, unbiased, and always current.

Note: Clarity does not feature data from the convenience arms of the major multiples, such as Tesco, Sainsbury's etc.

PriceCube by Talysis
Our always-on pricing intelligence engine. PriceCube gives clear visibility of product pricing across channels, customers, competitors and markets. It includes data from the major supermarkets and wholesalers across the UK.

Pricing and promotional data is gleaned on a daily and weekly basis and includes granular information, including discounts through individual supermarket loyalty & reward schemes and other promotional mechanics.

PriceCube helps businesses price faster, protect margins and to price with confidence

Fast, precise, and actionable.

Methodology

This report, "Convenience Q1 2026" is built using multiple data sources including proprietary Talysis sources (Clarity & PriceCube) and external data references (as referenced). It shows the key trends, drivers & performance of the independent convenience channel (excluding multiple convenience) .
Within this report the data is based on figures over the past 52 weeks data up 26/04 including Q1 figures up to 28/03

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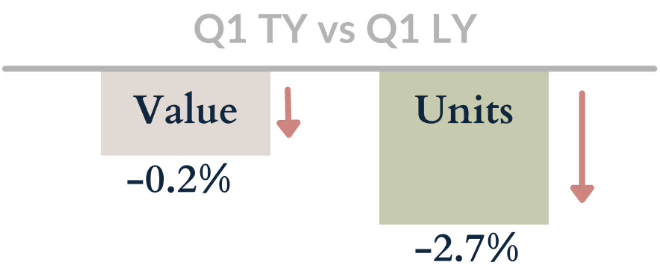
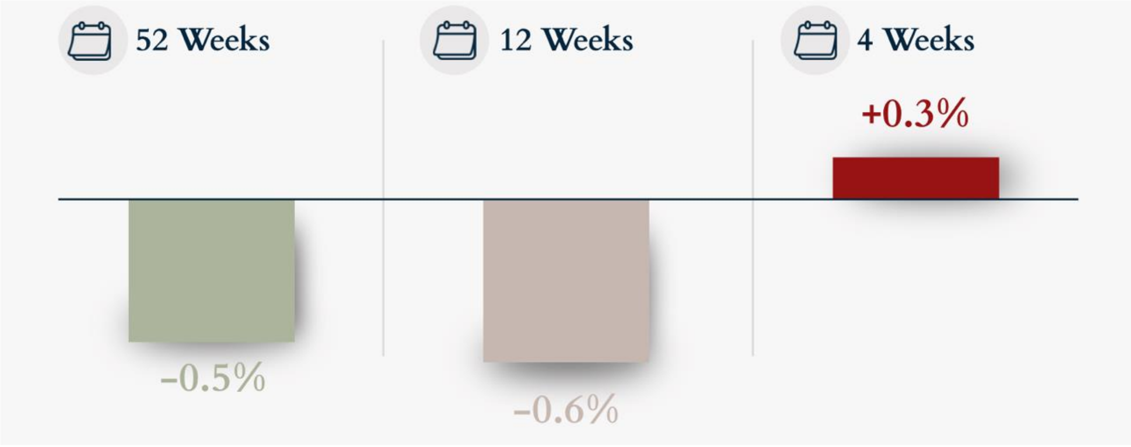


Value Sales Growth YoY

Short-term growth has returned, though medium and long-term trends remain negative



Source: Talysis Clarity data to w/e 20 April 2026

The convenience market is still facing challenges, despite short-term stabilisation.

In the past 4 weeks, value sales have risen by 0.3%, but this comes after a downward trend, with a 0.6% drop over the past 12 weeks and a 0.5% decrease over the past 52 weeks.

This indicates that while there are early signals of progress recently, the overall performance is still weak.

Regionally, the picture is largely flat, as most regions are experiencing slight declines. Scotland stands out as the only area showing notable growth, with value up +1.3% (52 YoY) , which may reflect differences in category mix or regional shopping behaviour.

Overall, the convenience channel continues to face a challenging environment, with only limited signs of recovery in the short-term.

Trends & Impacts

SHOPPER BEHAVIOUR SHIFTING

Shoppers are choosing bigger packs and sharing options to maximise perceived value

INFLATION-LED GROWTH

Rising prices are driving value growth

TOBACCO DECLINE

Traditional tobacco continues to decline. Alternative nicotine is growing but not enough to offset the loss

VALUE vs VOLUME DISCONNECT

Value looks strong, but fewer items are being sold

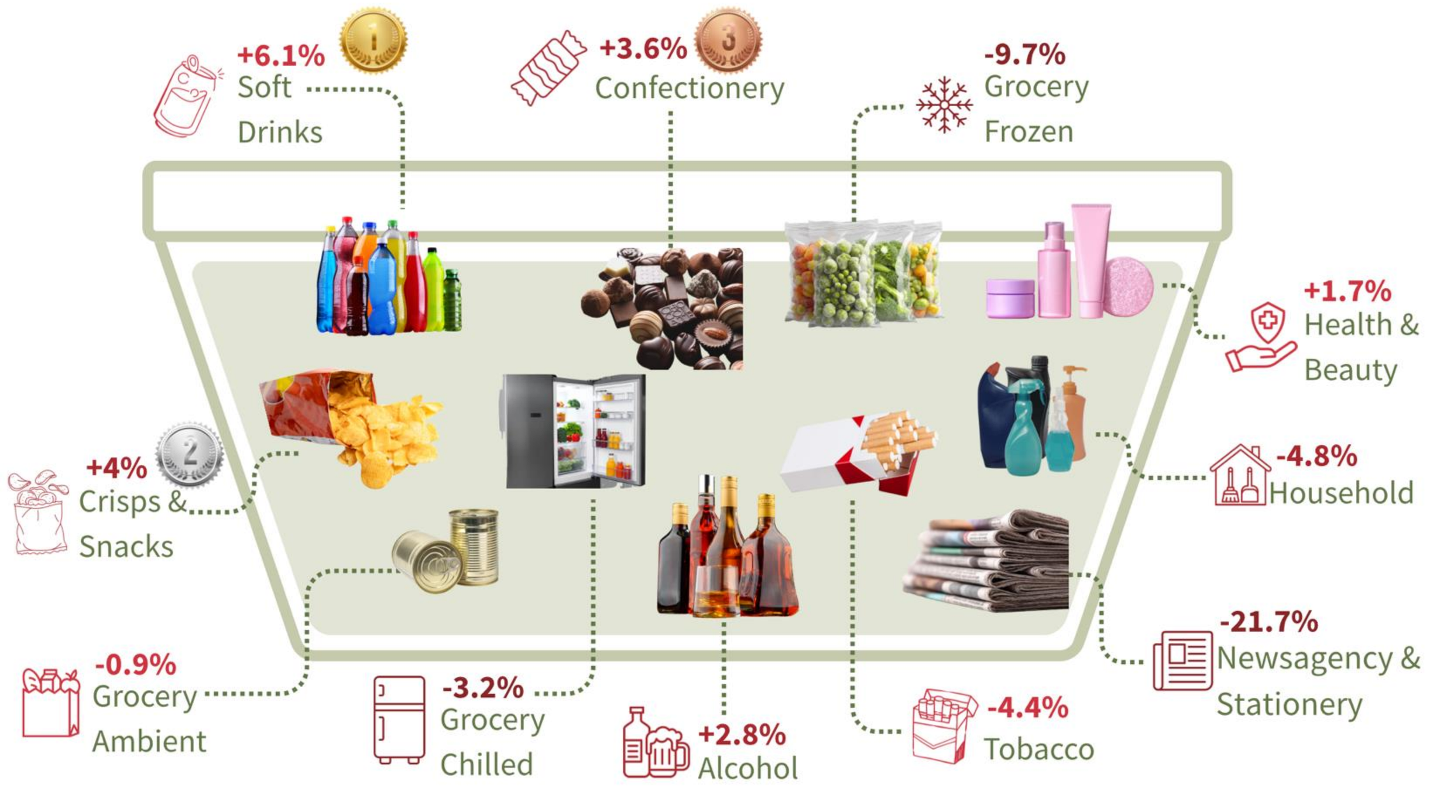
Pricing continues to significantly influence the convenience channel. Though inflation has become less severe than previous periods, the effects are still noticeable. Multiple departments are showing a value increase; however, this has not been backed by unit sales.

This disconnection between value and units suggests that price increases could be a key driver of the growth, rather than rising demand.
Confectionery (+3.6% value vs -3.6% units) clearly reflects this trend, where strong value performance conceal weaker underlying unit sales *(Q1 TY vs LY Market Read)*

Simultaneously, consumer behaviour is shifting. There is a growing focus on value, with larger pack sizes and sharing options becoming more popular as customers aim to maximise the perceived worth of their purchase.

The tobacco department continues to experience a lasting decline, characterised by decreasing sales and lost market share, affecting overall performance. Although alternative nicotine products are experiencing significant growth, it has not been enough to counterbalance the downturn in traditional tobacco, further highlighting the ongoing change within the department.

Winners & Losers



Soft Drinks

Value	Units	Share
+6.1%	+1.6%	+0.9%

Soft Drinks stands out as the strongest performing department in Q1 2026, delivering growth across both value (+6.1%) and units (+1.6%), alongside a +0.9% increase in value share. This performance is largely driven by Sport & Energy category, which continue to outperform all other categories within Soft Drinks.

Alcohol

Value	Units	Share
+2.8%	+1%	+0.6%

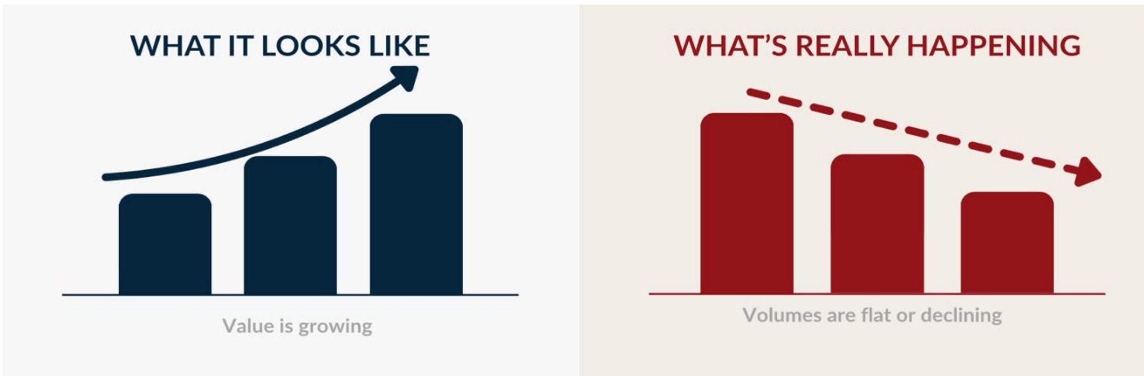
Alcohol also performs well, with value up +5.6% and units up +4.1%, supported by the continued momentum of RTDs. Growth across all categories are contributing positively towards Alcohol.

Source: Talysis Clarity data to w/e 28 March 2026

Winners & Losers

Not All Growth Reflects Demand

Strong value performance, but volumes are flat or declining



Growth driven more by price than by increased demand

Several convenience departments are showing strong value performance alongside weaker or declining volumes

Confectionery

Value	Units	Share
+3.6%	-3.7%	+0.2%

Confectionery is a clear example, with value up +3.6% but units down -3.7%. Impulse proving to be a major contributor to that with Value sales up +2.2%; However, unit sales are down -6.7%.

Smoking & Alternatives

Value	Units	Share
-4.4%	-7.8%	-1.3%

At the other end of the spectrum, Smoking & Alternatives continues to face ongoing decline. With both value (-4-4% and units (-7.8%) decreasing , alongside a -1.3% decline in value share. This reflects continued pressure on traditional tobacco products, with growth in alternative nicotine segments not yet sufficient to offset overall losses.

Source: Talysis Clarity data to w/e 28 March 2026

Key Insights

In the first quarter of 2026 the Smoking & Alternatives department has experienced a significant drop, with a decrease of -4.4% in value and a -7.8% decline in units in comparison to the first quarter in 2025. This persistent downturn indicates a continued strain from the 2025 disposable vape ban and the ongoing difficulties in traditional consumption.

However, there are shoots of growth in some of the smaller categories. Oral nicotine is particularly thriving, showing a 42.5% increase in value and a 46% rise in units during Q1 TY vs Q1 LY, which portraits its rapid acceptance among consumers.

Oral Nicotine is Growing Strongly

TY vs LY

VALUE GROWTH

+42.5%

More value
driven by strong category demand

UNIT GROWTH

+46%

More units
More consumers, more occasions

Strong, broad-based growth

Value and units up significantly YoY

Momentum is on your side

Oral nicotine continues to outperform the market

Source: Talysis Clarity data to w/e 28 March 2026

This divergence points to a significant change in consumer habits, as buyers are progressively steering clear of classic tobacco products in favour of newer, more user-friendly options.

Key Insights

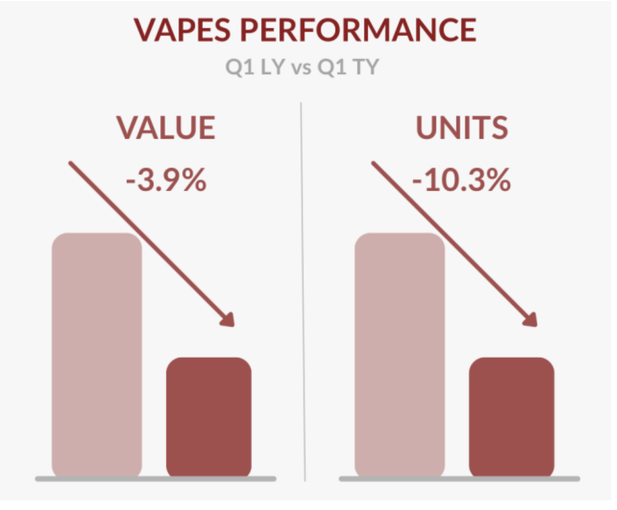
The vaping category continues to face pressure following recent disruption, with value down -3.9% and units declining by -10.3% in Q1 2026 compared to last year. This reflects the ongoing impact of regulatory changes, including the disposable vape ban.

However, purchasing patterns indicate that the shift towards reusable formats may not yet be fully embedded. Larger puff kits (12ML) and smaller puff kits (2ML) together (1.3M units) are currently outselling standard refill pods (1.1M units), despite being designed for repeated use (w/e 26/04).

Indicating that consumer habits have not completely shifted to a refill-based model, with some consumers potentially continuing behaviours similar to disposable usage, switching out products more frequently than necessary.

The Transition to Reusable is Still Evolving

Regulatory disruption continues to impact the category, while shopper behaviour remains inconsistent.



At the same time, pricing dynamics are also influencing category performance. Consumers can now often purchase double the liquid (e.g. 2 x 2ml pods) for a similar price to a single-use disposable vape (1 x 2ml), creating clear cost savings for those who adopt reusable formats. In addition, the rapid growth of "Big Puff" products - generating approximately £6 million per week - means that consumers are able to access significantly larger volumes of e-liquid (e.g. 12ml) in a single purchase.

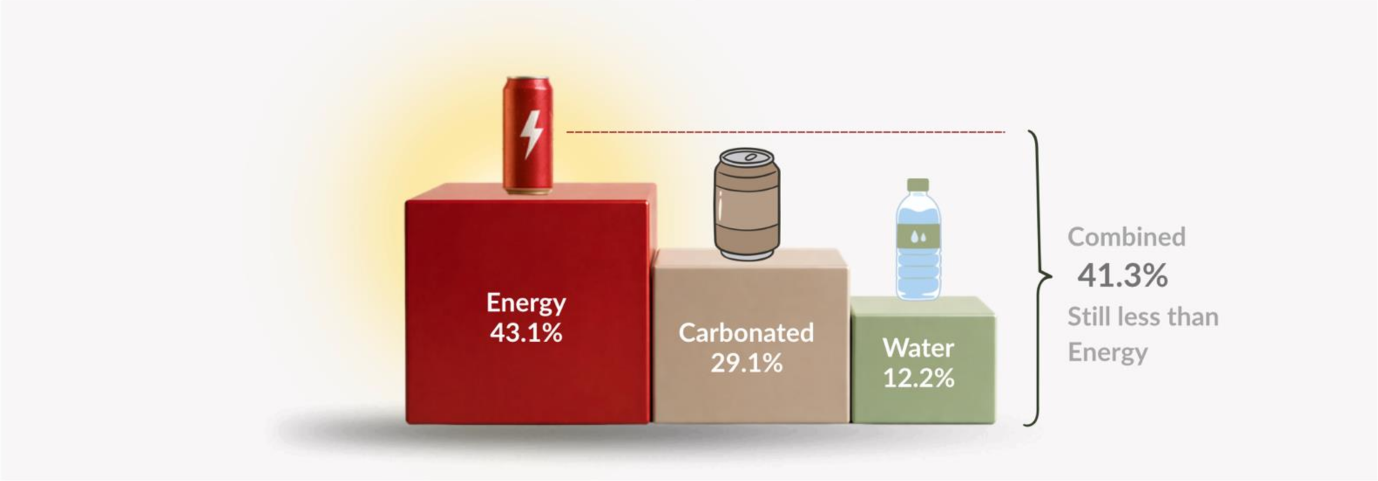
As a result, what was previously around £20 million per week concentrated in disposable vapes is now spread across multiple sub-categories. This fragmentation, combined with improved value per ml for consumers, suggests that while total spend may appear to decline, usage levels may not be falling at the same rate.

Source: Talysis Clarity data to w/e 26/04

Key Insights

Energy Dominates Soft Drinks

Even combined, others don't reach Energy.



Energy leads with
43.1% market share

Carbonates are declining
Share down to 29.1%

Energy drives growth and strengthens its dominance.

In Q1 2026, energy and sports drinks continue to dominate the Soft Drinks department, accounting for 43.1% of total value, having increased their share by +2.1% compared to Q1 LY.

This growth is supported by strong performance, with energy value sales up +10.4% YoY, making it one of the fastest-growing segments within the department.

In contrast, carbonated soft drinks – the second largest segment – now accounts for 29.1% of value share, declining by -1.9%, while water holds 12.2% share, with only marginal growth of +0.5%.

Even when combined, carbonates and water (41.3%) share remain smaller than energy alone, highlighting the scale of its dominance within Soft Drinks.

The outperformance suggests that energy drinks are more resilient than other segments, with shoppers increasingly choosing them over traditional options, likely because they offer more than just a refreshment and are part of regular purchase habits.

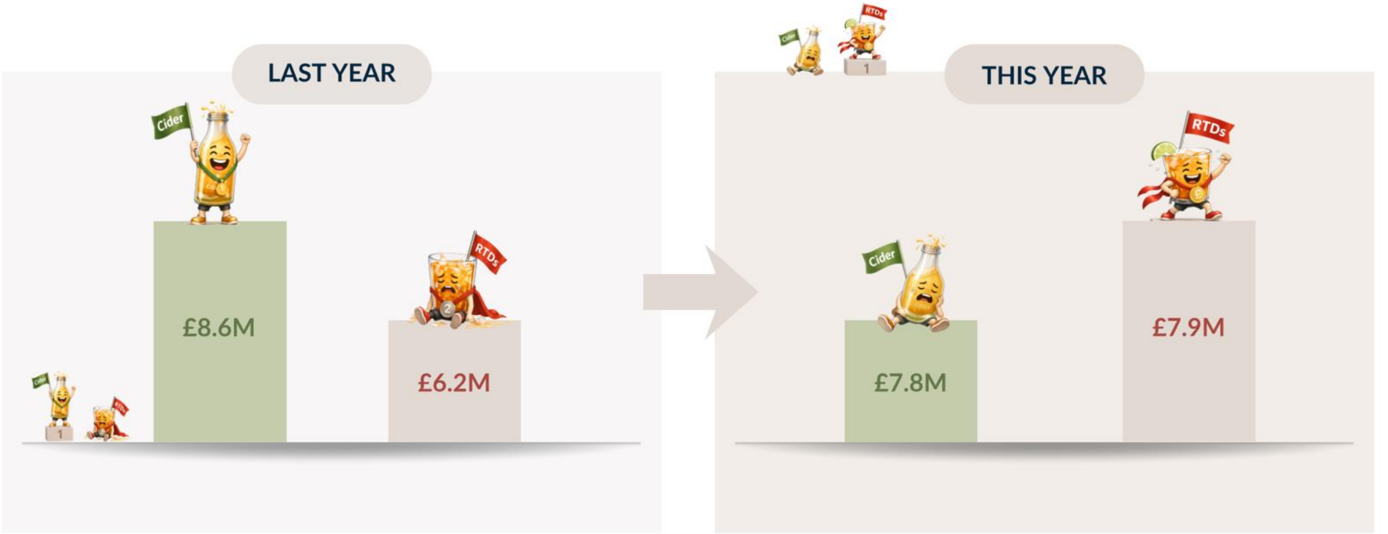
As a result, growth within Soft Drinks Is becoming increasingly concentrated in energy.

Source: Talysis Clarity data to w/e 28 March 2026

Key Insights

The Shift in RTDs and Cider

In the same period, leadership has shifted from Cider to RTDs.



RTDs are now ahead of Cider

A 1.7M swing

In the same period

Source: Talysis Clarity data to w/e 28 March 2026

RTDs overtake cider, confirming a predicted shift.

In the first quarter of 2026, RTDs maintain an impressive growth. RTDs has experienced an increase of 33.9% in value and a 24.6% rise in units in Q1 TY vs Q1 LY, greatly outdoing cider, which is experiencing a slower growth (+4.4% in value and +5.5% in units).

This surge has caused a significant change in market dynamics. For the week ending on 12th April 2026, RTDs brought in 7.9M pounds, surpassing cider, which totalled 7.8M pounds. This represents a contrast to the same week last year when cider was ahead with 8M pounds compared to RTDs' 6.2M pounds.

This aligns with our previous outlook, which highlighted RTDs as a significant growth area likely to surpass cider.

The ongoing growth of RTDs implies that they are increasingly taking market share from traditional alcoholic beverages, fuelled by strong consumer interest, convenience, and innovative formats.

Key Insights

The Illusion

What you see vs what's really happening within **impulse count line chocolate**.

WHAT IT LOOKS LIKE

VALUE GROWTH

+4.5%

WHAT'S REALLY HAPPENING

UNIT SALES

-8.4%

Growth driven by price, not demand

Shrinkflation Effect

You're paying more, but getting less

Source: Talysis Clarity data to w/e 28 March 2026

Growth driven by price, while shoppers shift to larger formats.

In Q1 2026, confectionery performance reflects a growing disconnect between value and volume, driven by changing shopper behaviour.

Count line chocolate is experiencing declining demand, with units down -8.4% compared to Q1 LY, despite strong value growth of +4.5%. This indicates that price increases are driving performance, rather than increased purchasing.

In contrast, large bag formats are growing across both value (+9.6%) and units (+9.6%), with value share increasing by +1.5%.

It seems shoppers are becoming more selective, moving away from smaller, single-serve products towards larger formats that offer better perceived value.

Key Insights

During the first quarter of 2026, the Crisps & Snacks department is experiencing an uptick in Value growth, although the emphasis is notably shifting towards sharing, with impulse sales starting to slide.

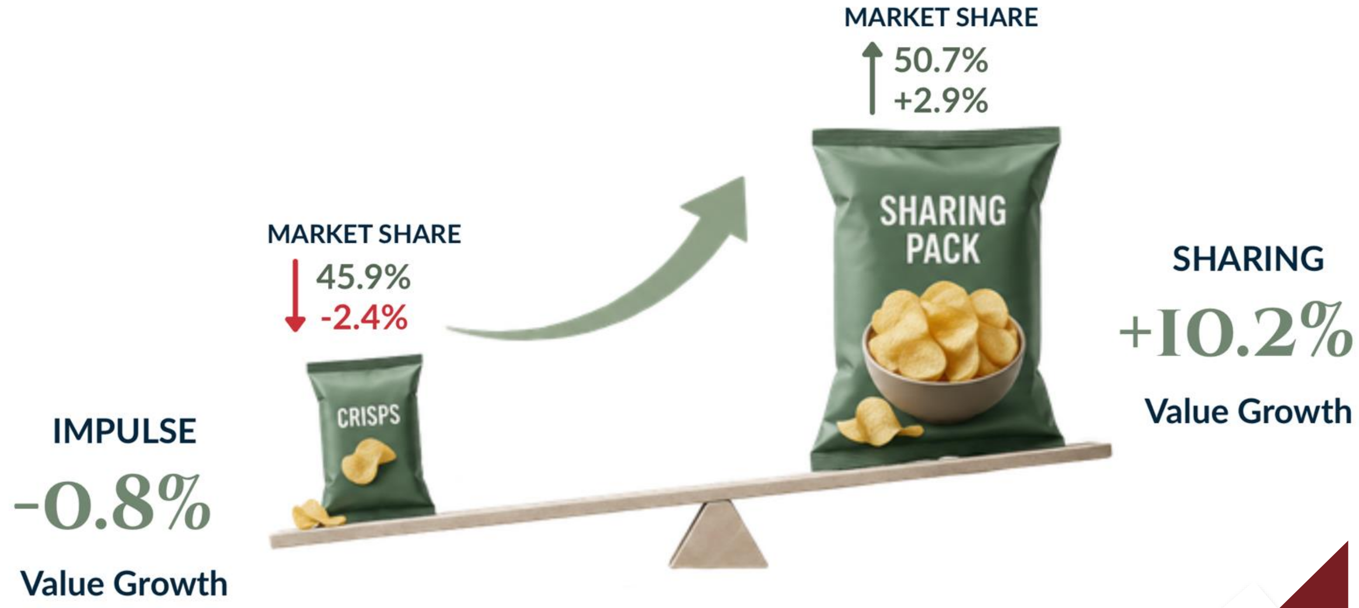
The sharing category has seen a significant rise, with their value increasing +10.2% YoY, significantly ahead of impulse which has experienced a decrease of -0.8%.

This has resulted in a notable shift within the category, with sharing now overtaking impulse in value sales. Last year, impulse remained the larger segment, but shopper behaviour has clearly shifted towards larger sharing formats, reflecting a growing focus on value and quantity.

This notable increase is also reflected in the market share, as sharing now represents 50.7% of the total value, an increase of +2.9%, while impulse has dropped to 45.9%, decreasing by -2.4%.

Growth Driven by Sharing Formats

Q1 2026 vs LY



Source: Talysis Clarity data to w/e 28 March 2026

This reveals that, although impulse purchasing still plays a crucial role in the overall market, the growth is being driven by larger sharing formats, which are gaining share as a result.

Easter

Easter delivered strong performance in 2026, with Mini Eggs emerging as a key driver of seasonal growth.

During Easter week, value sales of Mini Eggs brand reached £1.8M, a significant increase compared to £1.4M in Easter week last year. This growth was also supported by volume, with unit sales rising from 543K to 707K.

Strong Seasonal Performance Driven by Mini Eggs

Mini Eggs delivered a cracking Easter.

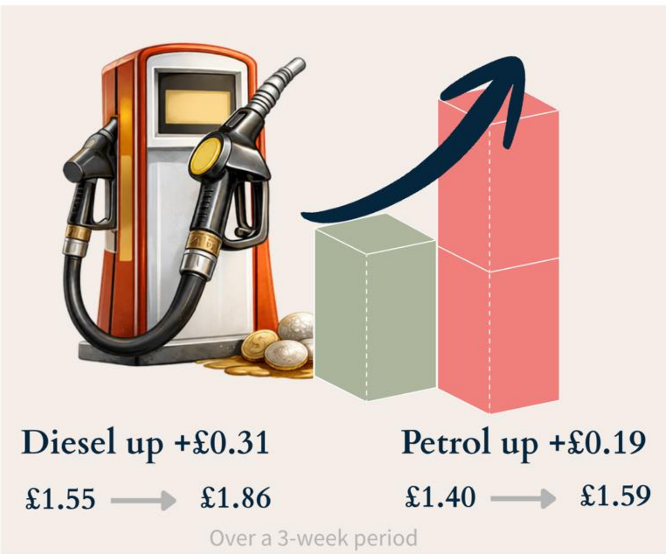
Source: Talysis Clarity data to w/e 5 April 2026

This suggests that, alongside strong seasonal demand, price and pack adjustments have played a role in driving value growth, highlighting the continued impact of inflation within seasonal convenience.

Forecourts

Fuel Prices Up. Shopper Habits Steady

Higher fuel costs, but in-store remain unchanged. habits



Source: Talysis Clarity data to w/e 20 April 2026

With all the turmoil in the Middle East at the moment, fuel prices have risen over recent weeks, although there are early signs that the pace of increases may be starting to ease. Over a three-week period, average UK petrol prices increased from £ 1.40 to £ 1.58, while diesel rose more significantly from £1.57 to £1.91 – widening the gap between the two to £0.34 (w/e 20/04).

While price have trended upwards, movement has begun to steady slightly in recent days, suggesting the market may be approaching a turning point, although this remains early.

What's particularly interesting is that this sustained increase has not yet translated into a change in shopper behaviour. Despite higher fuel costs, the number of shoppers making an additional in-store purchase – such as drinks or snacks – has remained largely unchanged with basket spend also holding steady.

For now shoppers appear to be absorbing the impact at the pump without cutting back in-store. Whether this resilience holds if prices remain elevated will be important to watch in the coming weeks.