

Convenience Stores - UK - April 2012

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"The convenience operations from the major grocery multiples are not traditional c-stores: instead, they are pared-down versions of their superstore offers. For independents, this means there are pressures to compete but there are also gaps in the offer to exploit. The independents must restate the convenience in c-store shopping, providing services and flexibility that cannot be found from the major chains."

– John Mercer – European Retail Analyst

In this report we answer the key questions:

- What has been the impact of the grocery multiples' move into convenience?
- How can independents compete with the grocery multiples?
- What are the prospects for the symbol groups?
- What are the opportunities for the sector as a whole?
- And where is there scope for improvement?

This report looks at how the convenience store sector and shopping behaviours are changing. The diversification of the major multiples into c-stores has revitalized the sector and forced the existing players into action. But it has also developed the nature of convenience-store shopping - from a destination for distress purchases to a standard grocery shop, particularly for last-minute meal solutions.

The symbol groups are in general responding to both of these developments with improved food offers and new own brands, and are recruiting new members at a rapid pace as a result of the intensifying competition and their improved proposition. This report looks at the prospects for the symbol groups and considers what more independents can do to survive alongside the multiples.

At one end of the spectrum, a c-store can come close to fulfilling the primary shopping needs for a particular location. This is particularly true of the c-stores of the major grocers such as Tesco, Sainsbury's, and the Co-operative, but also of symbol groups such as Spar, Nisa, and Londis.

At the other, smaller stores serving more limited catchments can be more akin to a super-CTN. One Stop, Premier Express, and Best-One are examples of these micro-c-stores. But this is a sub-sector with scope for further development, as recognized by Nisa with its launch of the Loco small-shop fascia in 2012.

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