twc | Harnessing data
Empowering wholesale
foodservice & convenience

SmartView Convenience webinar

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28 April 2026

Agenda

- Introductions
- The convenience market
- SmartView Convenience (SVC)
- StoreView
- Channel Track
- Summary / Close

50,500 Convenience Stores in the UK

71% are independent

(*no change in 10-15 years*)

=36,000 independent c-stores in UK

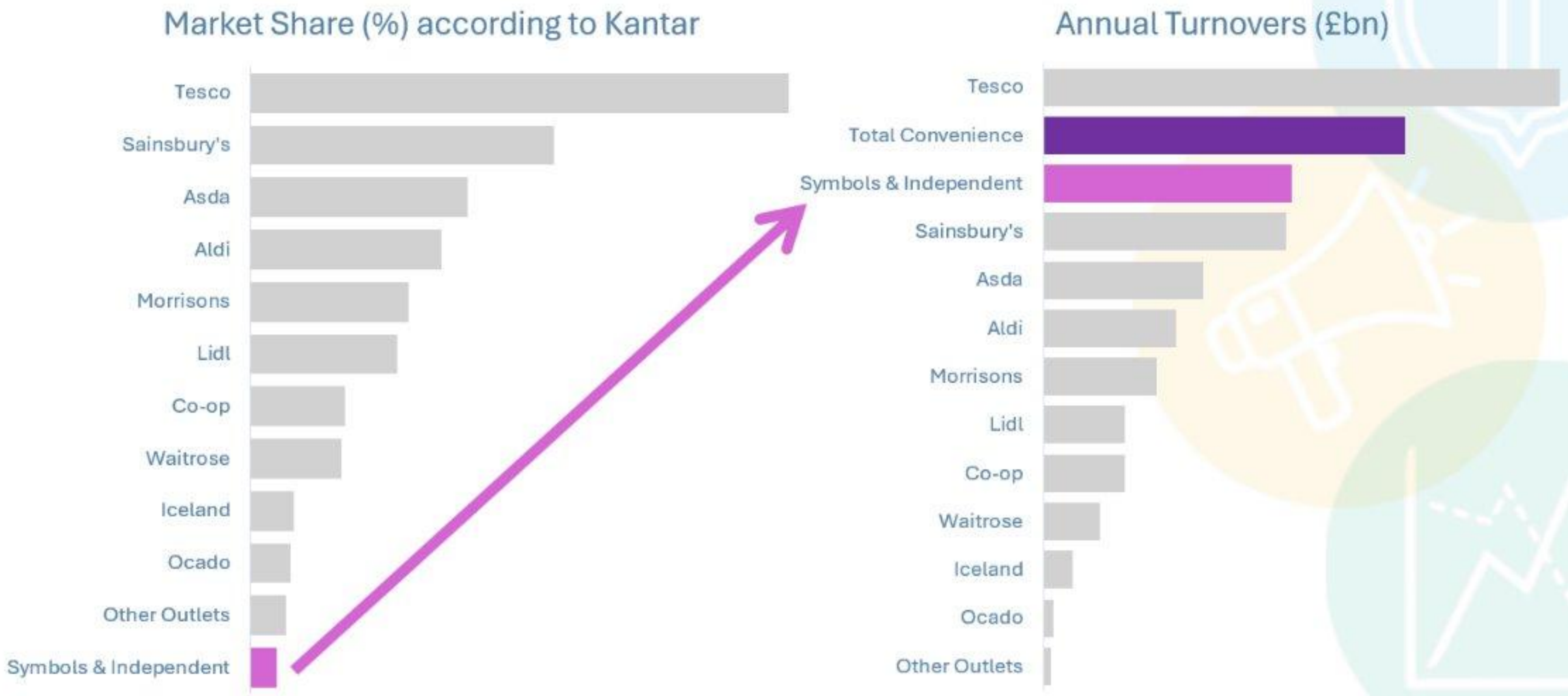
(Source: ACS Local Shop Report 2025)

Annual sales through UK Convenience stores?

£48.8 bn in 2025

(Source: ACS Local Shop Report 2025)

The true scale of symbols & indies



Source: SmartView Convenience in partnership with IGD MAT 22.02.26, Kantar.com Worldpanel Share, Scrapehero.com Supermarkets in the UK Industry Analysis Mar 2026, Co-operative.coop Profit and Membership Growth, IGD.com Waitrose Full Year Results, Grocerygazette.co.uk, Ocadogroup.com

Number of visits to independent convenience stores per annum?

+/- 3.5 BILLION

(TWC Estimate)

ChannelTrack

The opportunity:

Convenience

To achieve 1 more transaction per Independent & Symbol store per day & 10% of those transactions to contain 1 more item

£1 bn

Eating out of home

One third of the population to go out on 1 more occasion per quarter

£1 bn

When it comes to channel data:

We know most suppliers have global data agreements with established data agencies.

However, SmartView Convenience is regularly cited as the most reflective market read for GB independent convenience – SVC is increasingly bought in addition to complement retail mults data.

Our market read for independent convenience

SmartView Convenience

Part of the twc group

Methodology

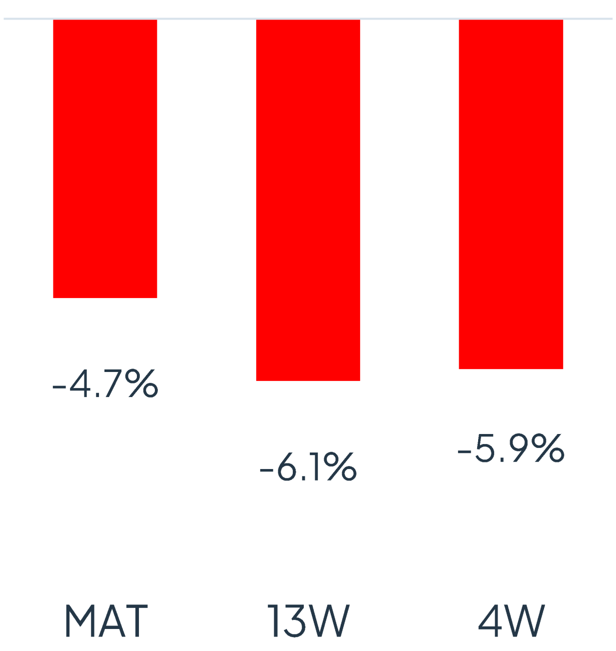
- A market read for the independent convenience channel
- 100% EPOS data from a representative sample of 5,000 stores (sourced from the largest sample of independent convenience store data available)
- Our sample is: reflective, stable, cleansed to industry standard product hierarchies
- Extrapolated to the total independent convenience universe of ca. 32k stores
- Account specific information for main fascias; plus a robust read of unaffiliated independents
- Excludes multiples / managed chains
- We cover all categories sold through the channel
- Accessed through our market-leading, web-based platform
- Location-specific (individual store level) data is available

How is the total independent convenience channel performing?

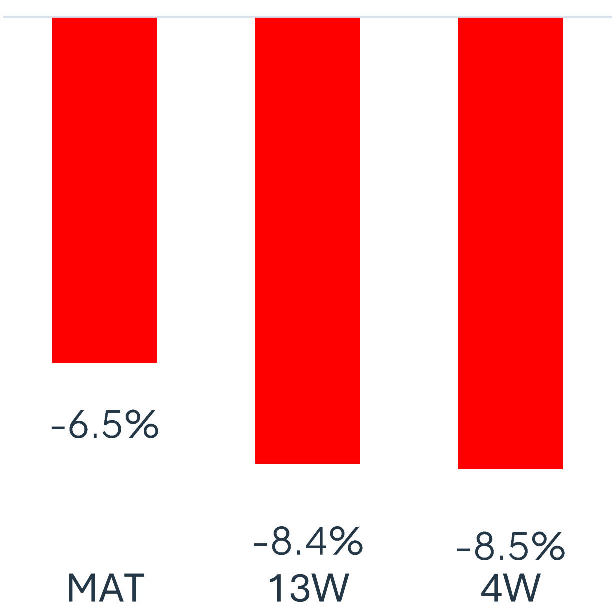
Total channel performance

Excludes commission & “other”
Total Till -3.9% MAT £

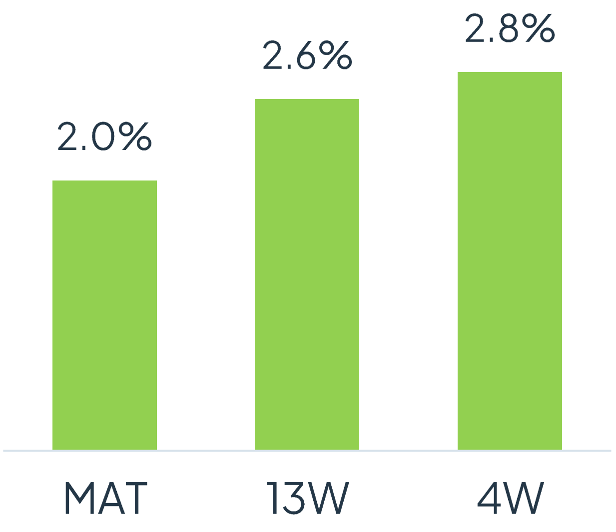
Value



Units



Average spend per unit

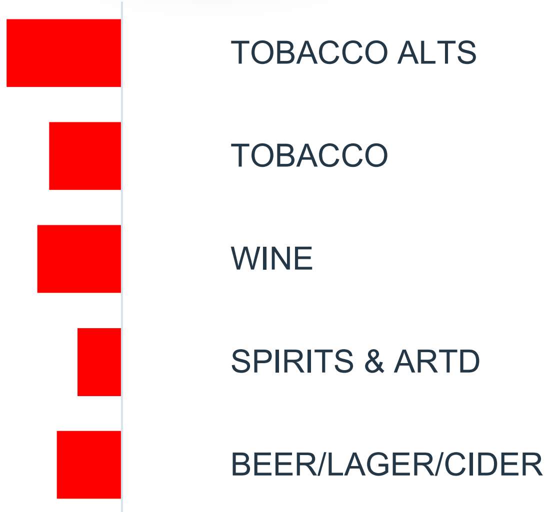


CPI at 3.0% (Source: ONS)

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
MAT w/e 22.03.2026. (Excludes commission & “other”)

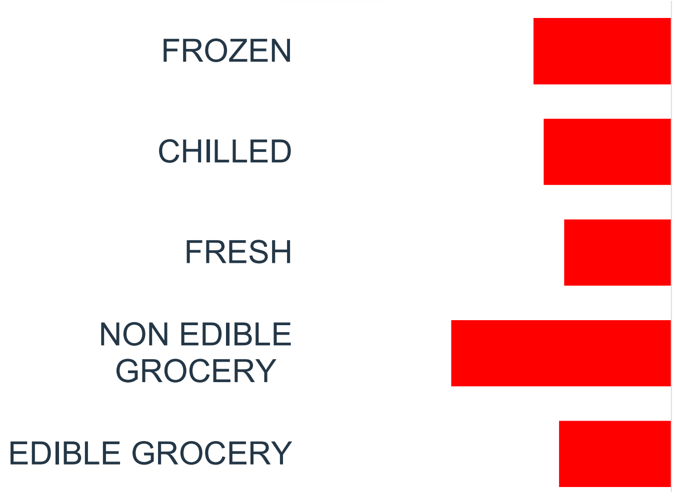
Impulse best performing area but growth has slowed

LICENSED -9.0%



IMPULSE +0.4%

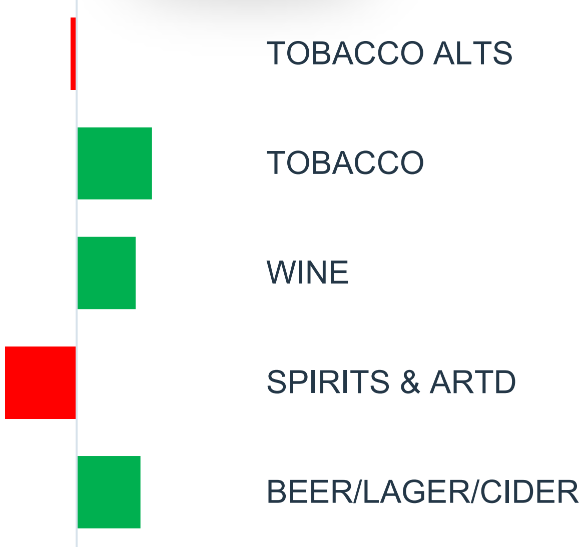
GROCERY -7.1%



Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
£ sales, 13 w/e 22.03.2026

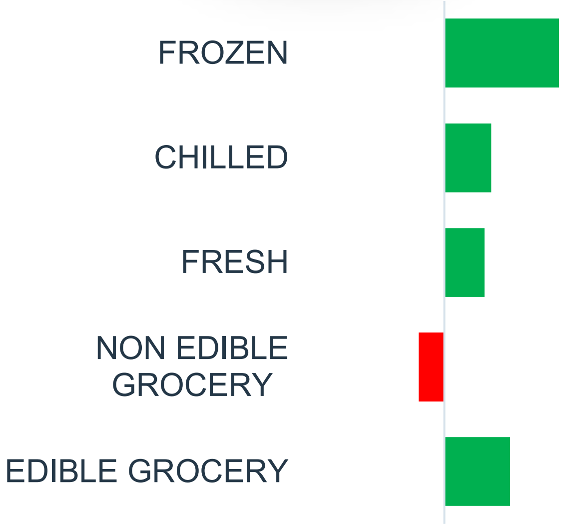
Prices rising, especially in impulse

LICENSED +2.4%



IMPULSE +7.8%

GROCERY +2.0%



Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
Average £ per unit, 13 w/e 22.03.2026

Growth hotspots: sub-categories

LICENSED

ARTD

SKE

NICOTINE POUCHES

NON-CREAM LIQUEURS

NOT GUILTY

LOW & NO ALCOHOL

IMPULSE

GRAB

PROTEIN

Butterkist

POPCORN

Grace
Mighty Malt
Original

MALT

GROCERY

READY MEALS

BUFFET

FROZEN PASTA & RICE

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
£ / unit sales, 13 w/e 22.03.2026

Growth hotspots: brands

LICENSED

PARAMOUNT

HAYATI

IVG

BUZZBALLZ

IMPULSE

RED BULL

MONSTER

TAKIS

DR PEPPER

GROCERY

SAMYANG

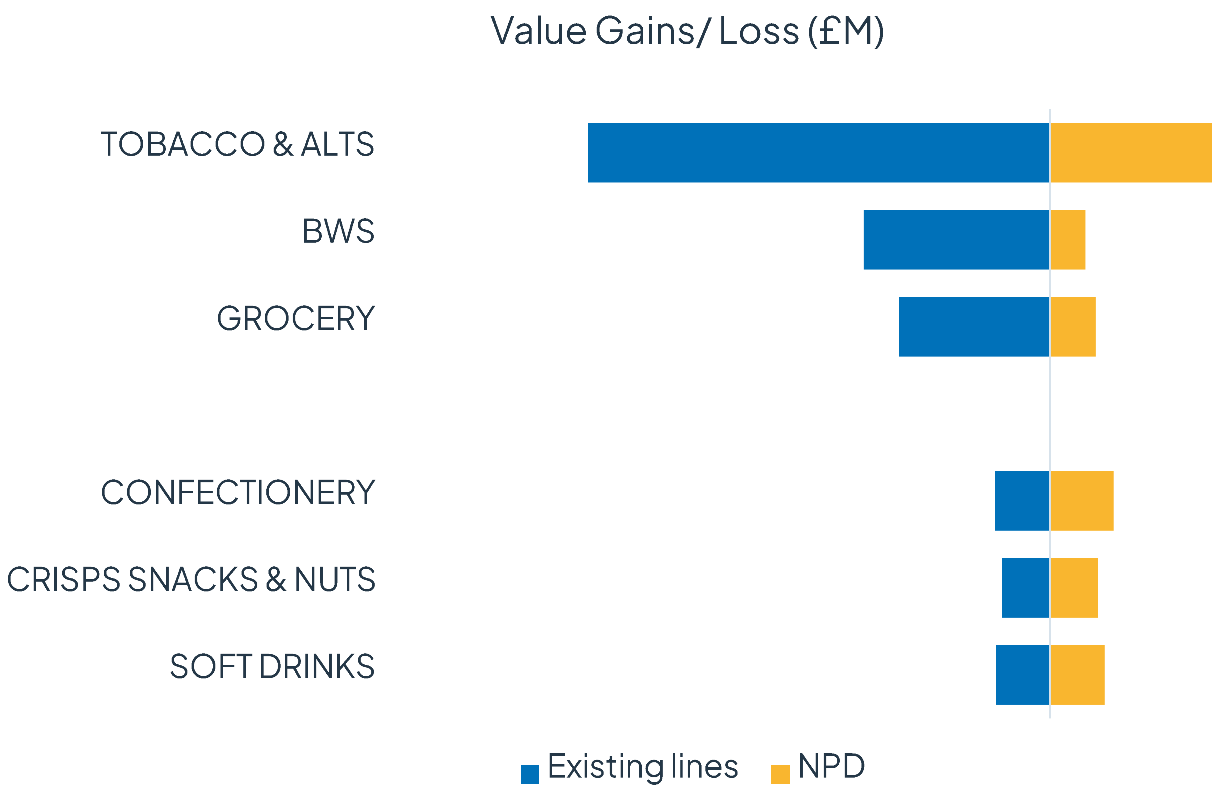
MCVITIE'S

QUALITY FOODS

SNACKSTERS

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
£ sales, 13 w/e 22.03.2026

363 brands have launched in the last 13 Weeks, with NPD contributing to over £254M sales across key categories.



363
brands launched in latest 13W vs
352
over 52W

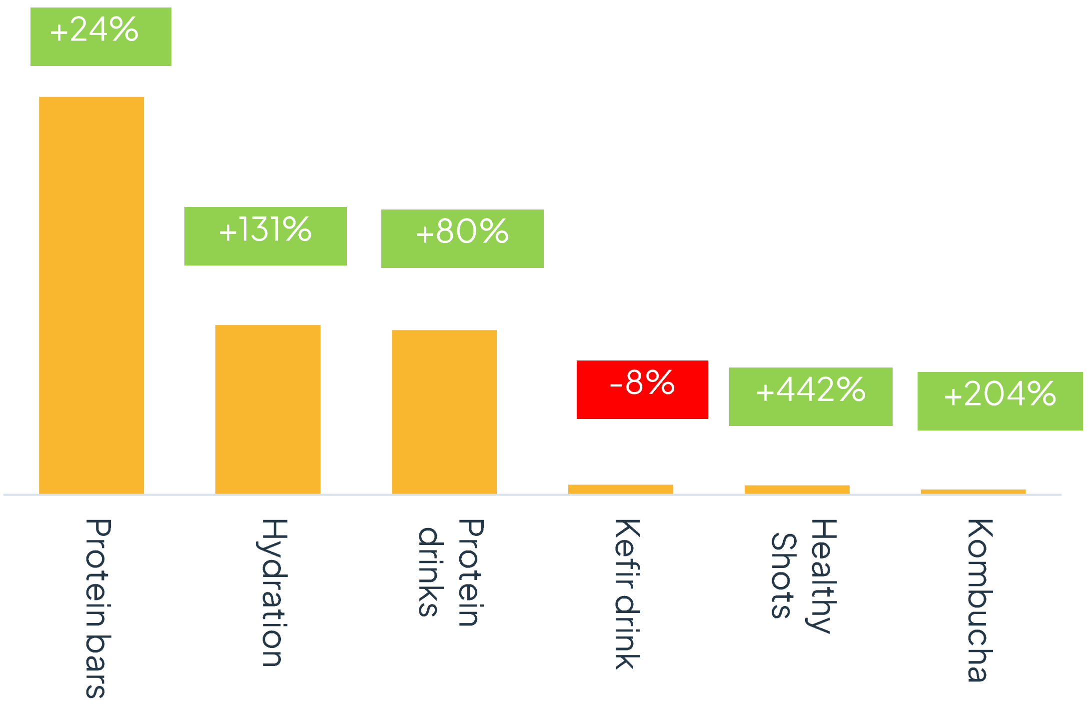
Leading NPD*:

*Excluding Tobacco and Alts

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
£ sales, 13 w/e 22.03.2026

Health-focused categories gaining momentum. Share & distribution opportunity

Value (£M) and % YoY Chg (13W)



Latest 13W	% Share of category	% Distribution of Biggest SKU
Protein bars	2.0%	61%
Hydration	0.7%	51%
Protein drinks	0.6%	38%
Kefir drink	0.3%	5%
Healthy Shots	0.4%	15%
Kombucha	0.1%	6%

Excludes commission/tobacco/news & mags/food-to-go/other

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
£ sales, 13 w/e 22.03.2026

Opportunity for convenience to replicate the success of functional health brands in grocery by increasing breadth and depth of distribution

	Grenade	Huel	Oatly	Vita Coco	Biotiful	Vitamin Well
MAT Value & %YoY Chg	£4.4M +28%	£2.2M +82%	£1.1M +13%	£0.6M +168%	£0.6M +168%	£0.14M +383%
Share of category	76%	2%	1%	2%	0.2%	0.2%
% distribution biggest SKU	61%	29%	34%	26%	6%	4%
Avg price vs category	£2.5 Vs £2.3	£3.4 Vs £1.4	£2.3 Vs £1.7	£2.7 Vs £1.4	£2.3 Vs £1.6	£1.9 Vs £1.4

Notes. Most significant categories used to calculate category shares & APPU

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC 52 w/e 22.03.2026

Summary

Channel performance remains under pressure

Impulse missions are driving growth

Growth hotspots show rapid acceleration in new behaviours

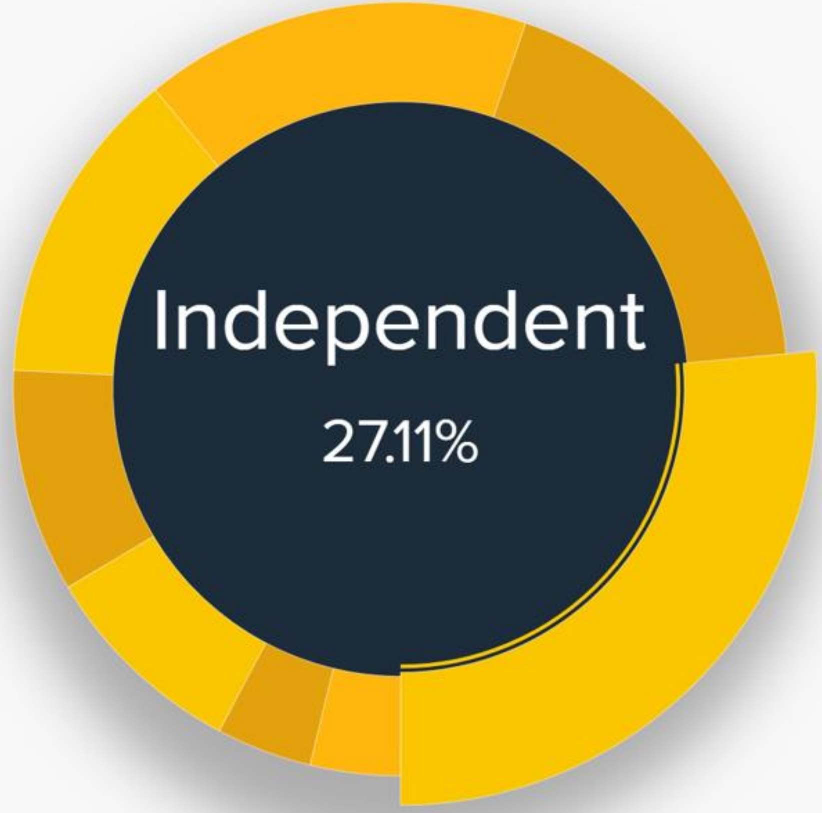
Opportunity to accelerate health-focussed products in convenience

We cover all categories sold through the channel

CATEGORY	SHARE	PT CHANGE
TOBACCO	17.95%	-0.97
SOFT DRINKS	10.36%	+0.76
COMMISSION	7.54%	-2.17
BEER LAGER CIDER	6.64%	-0.14
CONFECTIONERY	5.31%	+0.36
SPIRITS & ARTDS	5.23%	+0.11
EDIBLE GROCERY	3.22%	+0.03
CHILLED	3.16%	-0.02
TOBACCO ALTERNATIVES	3.13%	-0.71
WINE	2.96%	-0.08
NON EDIBLE GROCERY	2.95%	-0.09
CRISPS SNACKS & NUTS	2.61%	+0.03
NEWS/MAGAZINES	1.62%	+0.02
FROZEN	1.28%	+0.07
BREAD & CAKES	1.15%	-0.02
FRESH	0.44%	+0.01
FOOD TO GO	0.10%	-0.01
OTHER	24.34%	+2.80

Named fascia data

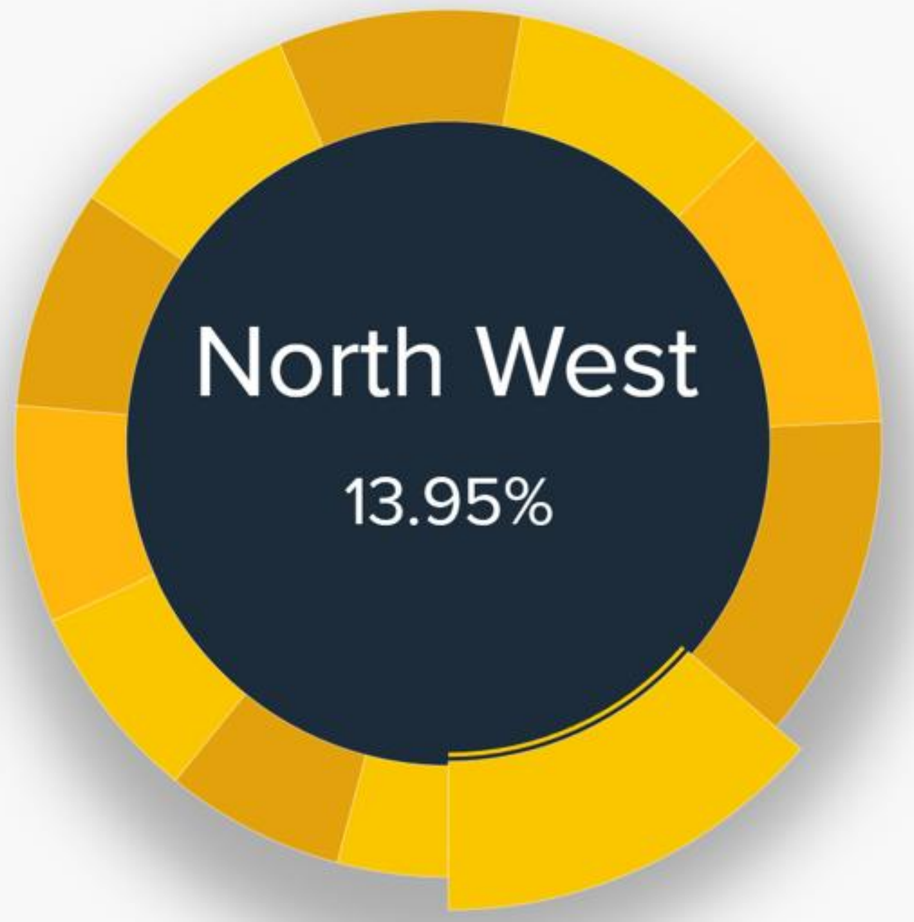
CATEGORY	SHARE	PT CHANGE
INDEPENDENT	27.11%	+0.14
OTHER	18.59%	+0.24
PREMIER	16.33%	-0.05
UNITAS FASCIA	13.34%	+0.17
COSTCUTTER	9.20%	-0.39
LONDIS	8.50%	-0.08
BEST ONE	3.60%	0.00
NISA	3.33%	-0.03
TOTAL	**100.00%**	**0.00**



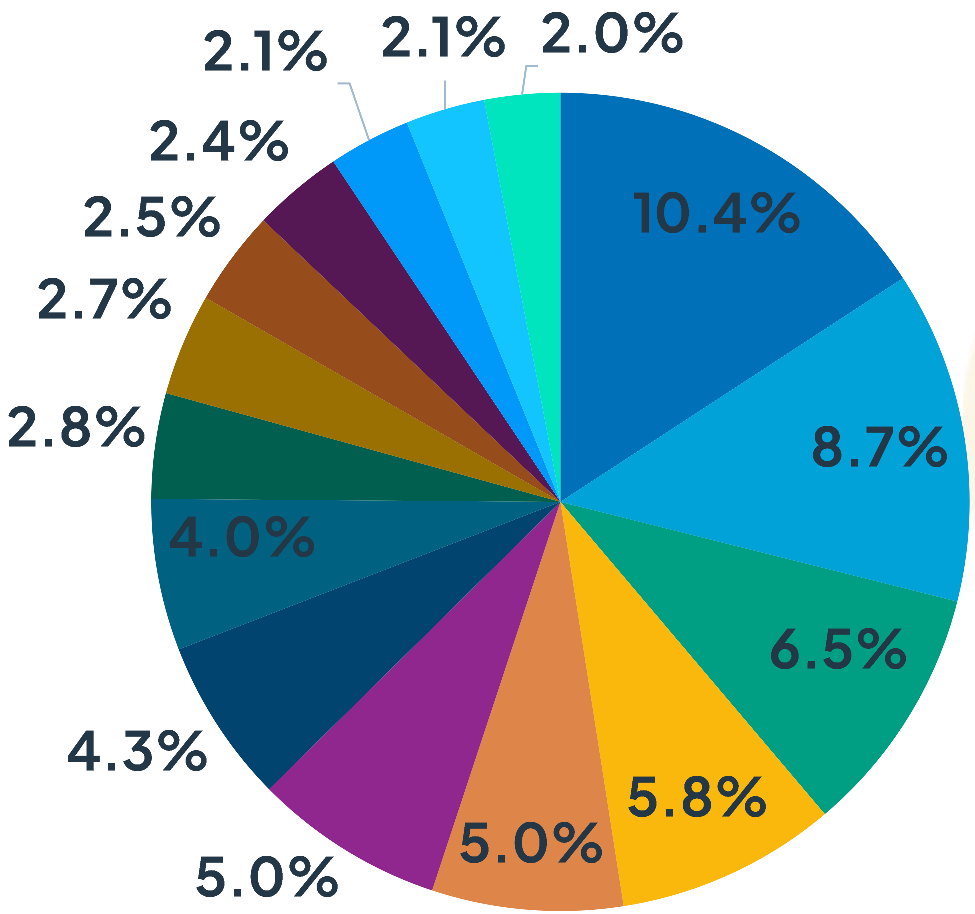
Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
Total confectionery, £ sales, MAT w/e 22.03.2026

Regional reporting

CATEGORY	SHARE	PT CHANGE
NORTH WEST	13.95%	+0.14
YORKSHIRE AND THE HUMBER	12.36%	-0.66
NORTH EAST	11.74%	+0.12
SCOTLAND	9.95%	+0.02
SOUTH EAST	9.09%	+0.13
EAST MIDLANDS	9.02%	+0.04
LONDON	8.17%	+0.24
WEST MIDLANDS	8.01%	+0.07
WALES	7.36%	-0.12
EASTERN	6.56%	-0.05
SOUTH WEST	3.79%	+0.07
TOTAL	**100.00%**	**0.00**



Example brand share reporting – biscuits

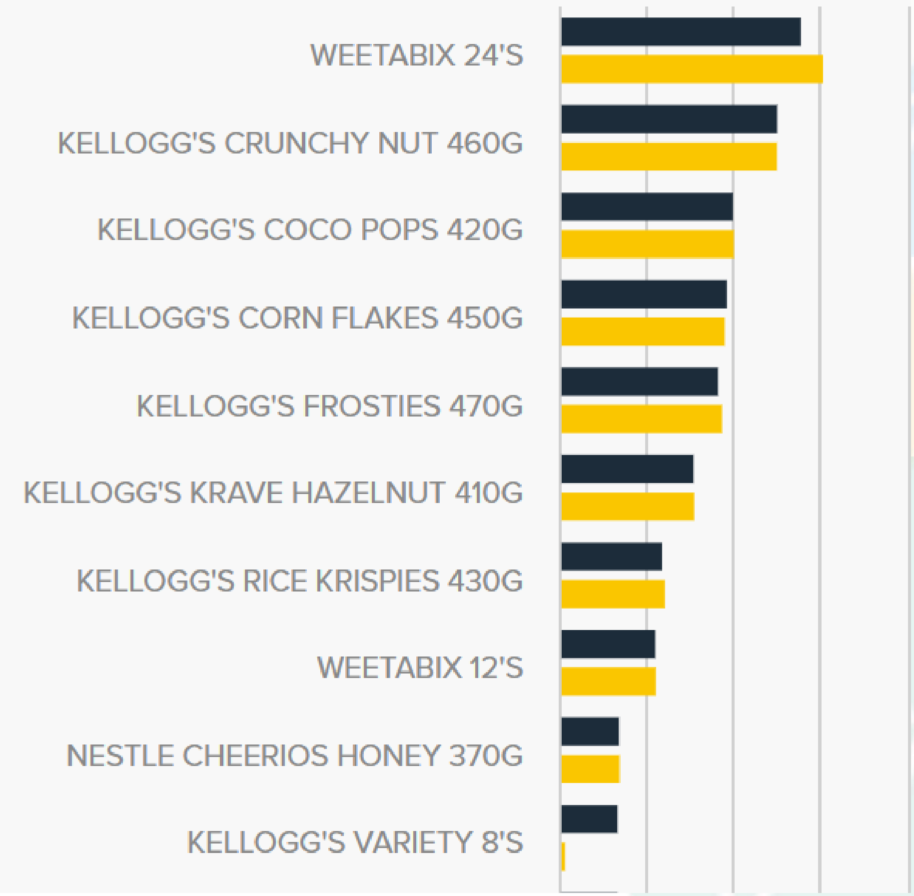


Brand names withheld

Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
Total biscuits, £ sales, MAT w/e 22.03.2026

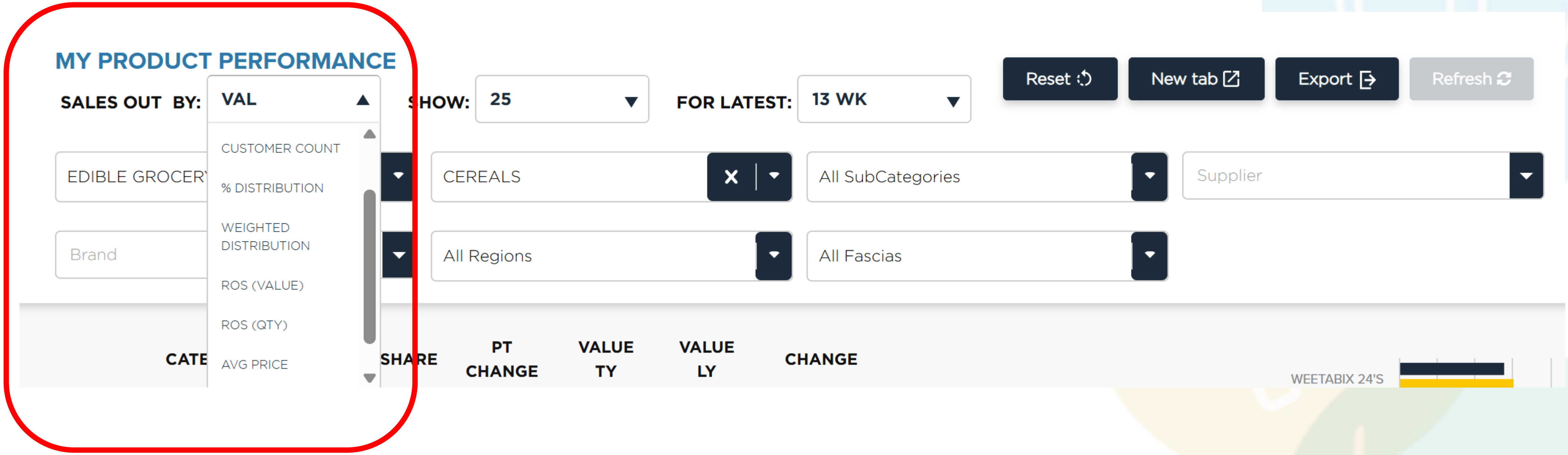
Product level detail

CATEGORY	SHARE	PT CHANGE	VALUE TY	VALUE LY
WEETABIX 24'S	0.00%	-0.64	£1,382,916	£1,508,921
KELLOGG'S CRUNCHY NUT 460G	0.00%	+0.20	£1,245,027	£1,243,800
KELLOGG'S COCO POPS 420G	0.00%	+0.11	£990,591	£996,555
KELLOGG'S CORN FLAKES 450G	0.00%	+0.23	£954,491	£941,607
KELLOGG'S FROSTIES 470G	0.00%	0.00	£904,648	£925,806
KELLOGG'S KRAVE HAZELNUT 410G	0.00%	+0.09	£761,809	£766,068
KELLOGG'S RICE KRISPIES 430G	0.00%	-0.03	£580,476	£597,443
WEETABIX 12'S	0.00%	+0.06	£540,125	£543,586
NESTLE CHEERIOS HONEY 370G	0.00%	+0.03	£332,585	£335,424
KELLOGG'S VARIETY 8'S	0.00%	+2.07	£324,311	£21,095



Source: SmartView Convenience I-TG International Services Ltd in partnership with TWC
Total breakfast cereals, £ sales, 13 w/e 22.03.2026

Additional measures



Additional measures have been added in response to existing client feedback – now all pre-populated in the platform for your convenience

Accuracy of SVC vs field visit audits:

SVC data compared to client's own field sales audit findings revealed a 99% accuracy across the two data sources

99%

Source: client's own field rep audits vs. SVC distribution data

SVC reports WHAT is being sold

StoreView reported WHO is shopping

StoreView

Part of the twc group

StoreView

Part of the twc group

- Source data is 10.2 million UK consumers' debit & credit card spend

- 75 demographic data profile points x 40,000 convenience / grocery stores across the UK

- Target stores based on their existing shopper demographics; see where else shoppers are shopping

Who shops in each channel?
For S&I, the typical shopper is younger, male, lower affluent…but this can change from store to store

I&S remain heavily reliant on a younger, male, lower-affluence shopper

Spend Profile	18-34	35-54	55+	Female	Male	High Affluence	Mid Affluence	Low Affluence
Supermarket	13.5%	41.8%	44.7%	61.6%	38.4%	25.6%	49.2%	25.2%
Supermarket Convenience	19.5%	47.9%	32.6%	50.3%	49.7%	26.3%	48.2%	25.5%
Other Convenience	14.4%	40.9%	44.7%	57.8%	42.2%	32.4%	47.5%	20.1%
Independents & Symbols	20.9%	45.9%	33.2%	44.9%	55.1%	22.9%	44.4%	32.8%

Shifts in shopper mix strongly suggests I&S are losing their core value-led shopper with some spend switching to Supermarkets and some being lost from the channel

Channel Share of Profile Change YOY	18-34	35-54	55+	Female	Male	High Affluence	Mid Affluence	Low Affluence
Supermarket	0.1%	-0.4%	0.4%	-1.0%	1.0%	-0.1%	-0.1%	0.3%
Supermarket Convenience	-0.2%	0.0%	0.2%	-1.2%	1.2%	0.4%	0.0%	-0.4%
Other Convenience	0.3%	0.5%	-0.7%	0.3%	-0.3%	0.2%	0.0%	-0.1%
Independents & Symbols	-0.7%	-0.2%	0.8%	0.2%	-0.2%	0.5%	0.1%	-0.5%

Coming very soon!

ChannelTrack

Part of the twc group

ChannelTrack
Part of the twc group

+

+

SmartView Convenience
Part of the twc group

10.2 million UK consumers' debit and credit card spend

70.000 consumer research interviews

Retail EPOS (representing 3.5bn transactions, 33k indie stores)

ChannelTrack
Part of the twc group

Our ambition:

'To provide the most unique, insightful and valuable data set for the wholesale route to market channel'

ChannelTrack

Part of the twc group

Convenience shopping happens in supermarkets as well as in convenience stores
Where else are convenience store shoppers spending their money? (retail + foodservice).
Channel Track will report this

JUST EAT

Uber Eats

deliveroo

Coming very soon! – price marked pack study

There is a lot of PMP activity in the market in 2026 – TWC will conduct consumer and retailer research to understand current perceptions and behaviour

Register your interest with tom@twcgroup.net

Summary

- TWC has identified a £1bn sales growth opportunity through independent convenience stores by achieving 1 more transaction per store per day & 10% of those transactions to contain 1 more item
- There are 36,000 independent convenience stores in the UK – the share of convenience stores which are independent has not declined in 10 years
- There are 3.5bn visits to independent convenience stores per annum
- The combined turnover of symbol & indies is comparable to that of Sainsbury's

Please contact us to arrange a SVC demo or find out more about all our products & services

Contact Sarah:
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Visit www.twcgroup.net

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