PDI TECHNOLOGIES

C-Store Shopper Insights Report for CPG Brands

Get the latest transaction-level data and insights from PDI Technologies

FEBRUARY 2025

The Growing Importance of the Convenience Channel

Getting a clear view of the entire convenience retail channel requires going beyond just the largest c-store chains. With independent operators comprising 63% of the overall c-store market, Consumer Packaged Goods (CPG) brands would be wise to dive deeper into this large and influential pool of data to extract even more valuable information.

Understanding the typical c-store and its shoppers can help CPGs build a holistic perspective of the entire convenience retail industry—and lead to more effective collaboration with your retail partners. This report features transaction-level data from over 18,000 small-chain or independent c-stores collected by PDI Technologies.

35%
of brick-and-mortar retail is convenience stores

400K
shoppers visit the average c-store each year (1,100 per day)

150K+
total number of c-stores in the US

160M
daily transactions across all US c-stores

63%
of US convenience stores are independent sites

1.5%
year-over-year growth (fastest-growing retail channel)

80%
of US c-stores sell fuel

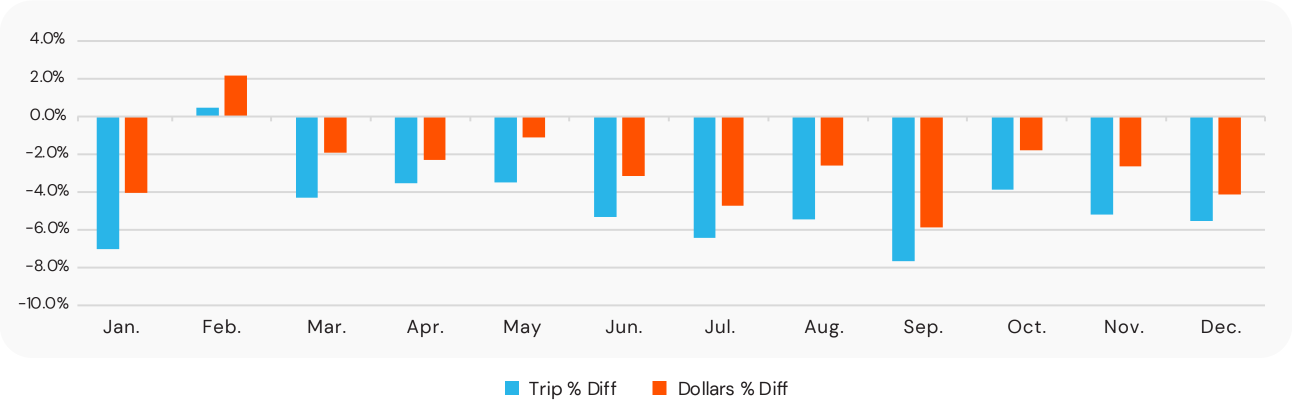
All data provided by PDI Technologies or GasBuddy, unless otherwise noted.

How Did 2024 C-store Sales Stack Up Next to 2023?

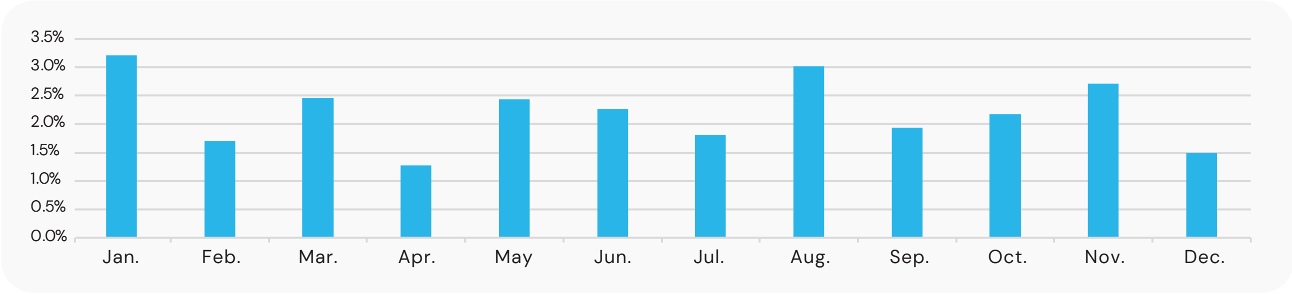
Other than February, each month in 2024 saw a sales decline of at least 3.5% and as much as 7.0% compared to 2023. In addition, store trips declined year over year, ending up at -4.6% overall for 2024.

Helping to maintain store profitability, average basket spend was up each month of 2024, with a high point of 3.2% in January. Average unit prices were up 4.1% for the year.

Monthly Sales and Transactions: 2023 Vs. 2024



Monthly Average Basket Spend: 2023 Vs. 2024

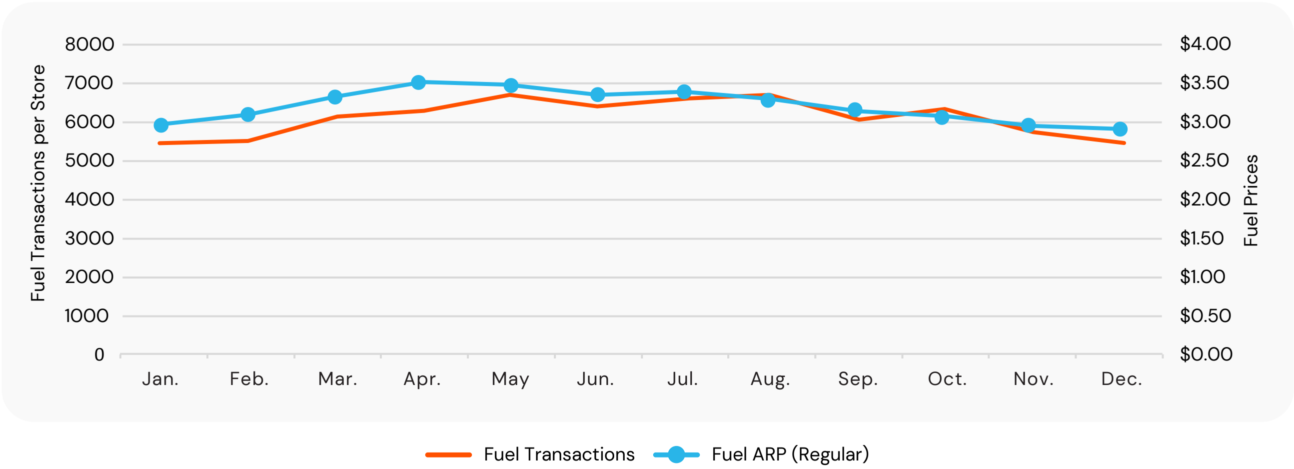


What's the Fuel Price Impact on Trips?

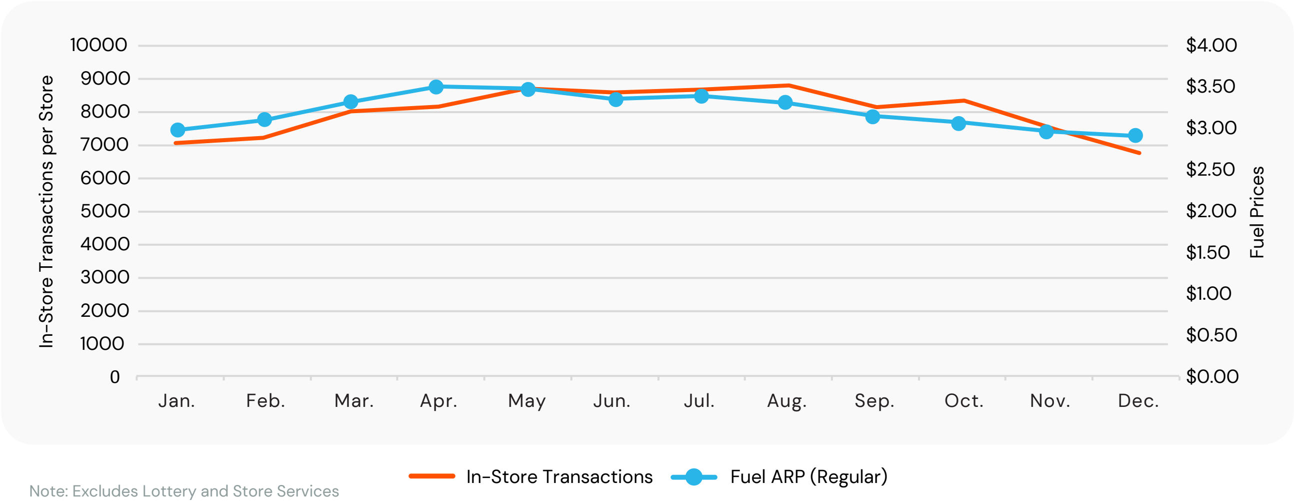
Data reveals a strong correlation between the average price for a gallon of gas and the amount of overall convenience trips, which includes both in-store and fuel trips. As fuel prices rise, so do the number of trips—and vice versa. In all, the correlation is 0.79 for fuel trips and 0.78 for in-store trips.

This data also reflects the seasonality of trips to the pump and store, given relatively stable fuel prices. In times of extreme fuel prices, these correlations tend to inverse but result in larger basket sizes inside the store. In other words, shoppers buy the same amount but do so less frequently.

Fuel Trips and Fuel Prices



In-Store Trips and Fuel Prices



Note: Excludes Lottery and Store Services

Hot or Not? What Categories Are Growing?

Although overall in-store sales were down 2.8% year over year from 2023 to 2024, some categories bucked that trend by showing significant growth. Likewise, other prominent categories experienced significant decline, with some falling by double digits.

C-Store Sales: 2023 Vs. 2024

- In-Store Sales: **-2.8%**
- Units: **-3.1%**
- Transactions: **-3.8%**

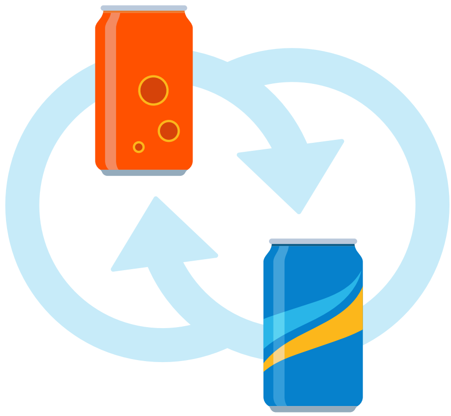
What's Hot

Foodservice Prepared Onsite	**16.3%**
Frozen Dispensed Beverages	**8.1%**
Health and Beauty Care	**6.8%**
Cold Dispensed Beverages	**6.2%**
Store Services	**5.2%**

What's Not

Lottery/Gaming	**-33.2%**
Perishable Grocery	**-12.8%**
Non-Edible Grocery	**-10.6%**
Alternative Snacks	**-6.7%**
Other Tobacco Products	**-5.9%**

What Are the Strongest Affinity Pairings?



What goes well with soda? For the average c-store customer, the answer is more soda. When it comes to the top affinity pairings in a single c-store transaction, beverages dominate and leading soda brands hold the highest spots.

In terms of cross-category pairings, the Top 7 include everything from lighters and cigarettes to candy and salty snacks.

Top 7 Cross-Category Pairings

	Product 1	Product 2	Total Transactions
1	**Monster Energy** 16 oz Bottle	**Marlboro Red** Single Box	5,454,691
2	**Red Bull Original** 12 oz Can	**Coca-Cola Original** 20 oz Bottle	4,108,786
3	**Coca-Cola Original** 20 oz Bottle	**Doritos Nacho Cheese Chips** 2.75 oz Bag	3,172,653
4	**Bic Classic Lighter** Single Count	**Marlboro Red** Single Box	2,697,233
5	**Mountain Dew Original** 20 oz Bottle	**Grizzly Long-Cut Wintergreen** Single Count	2,388,705
6	**ICE MOUNTAIN Natural Water** 7.7 oz Bottle	**Reese's White Chocolate** 1.5 oz 2 Pack	1,828,508
7	**Mountain Dew Original** 20 oz Bottle	**Hunt Brothers Hunk A Pizza** 12 in	1,731,576

What Are the Emerging Brands to Watch?

Similar to 2024 growth categories, several brands experienced a sales boost, with packaged beverages again leading the way. All of these Top 8 emerging brands align closely with categories associated with the most common c-store shopper profile (young males).

- **Packaged Beverages (2)**
- **Beer (2)**
- **Other Tobacco Products (2)**
- **Salty Snacks (1)**
- **Alternative Snacks (1)**

1 **Reign Total Body Fuel**
Energy Drink
Avg Store Revenue **$408,533**

2 **Hard Mountain Dew**
Flavored Malt
Avg Store Revenue **$169,487**

3 **Pom Pom**
Cigars
Avg Store Revenue **$152,109**

4 **Happy Dad**
Flavored Malt
Avg Store Revenue **$100,041**

5 **Prime**
Sports Drink
Avg Store Revenue **$93,956**

6 **Goodies**
Cigars
Avg Store Revenue **$76,911**

7 **Barcel Takis Kettlez**
Potato Chips
Avg Store Revenue **$66,464**

8 **No Man's Land**
Meat Snacks
Avg Store Revenue **$30,098**

What's the Value of the C-Store Retail Channel?

Convenience retail represents a large, yet untapped channel for many CPG brands. Understanding the c-store channel and its shoppers more effectively can open up a wide range of potential sales and promotional opportunities.

Big Trends for 2025

- High-frequency shoppers (skewing younger and male)
- Single-serve packaging
- Immediate-consumption trial product strategy

The Value of the C-Store Customer

C-Stores Are (Almost) **Everywhere**

43% of Americans live within **1 mile** of a c-store

86% of rural residents live within **10 minutes** of a c-store

38% of US shoppers visit a c-store about **twice a week or more**

C-Store Trip Insights

80% of c-store **buying decisions** happen **before** the shopper gets to the store

$8.59 c-store average **spend** per basket

71% of c-store visitors are **men**

Why People Visit C-Stores

71% of consumers discover **new brands and products** in c-stores

67% of US shoppers visit a c-store about **once a week or more**

43% of shoppers **decide convenience** before they leave for the c-store

About This Report

This report includes consumer buying data collected from over 18,000 independent convenience retail sites across all key US geographic locations. It reflects just one of the ways PDI is "Connecting Convenience" across the globe to help retailers and CPG brands streamline their operations and collaborate more effectively.

You can leverage PDI's independent convenience retail solutions and data to gain deeper visibility into this increasingly valuable retail channel.

Learn more at

pditechnologies.com

About PDI Technologies

With 40 years of industry leadership, PDI Technologies, Inc. resides at the intersection of productivity and sales growth, delivering powerful solutions that serve as the backbone of the convenience retail and petroleum wholesale ecosystem. By "Connecting Convenience" across the globe, we empower businesses to increase productivity, make informed decisions, and engage faster with their customers.

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