



The Forecourt Report 2026

A report by the Association of Convenience Stores

[#ForecourtReport](#)

ACS | the voice of
local shops

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The importance of forecourt stores

The 2026 Forecourt Report provides a detailed insight into the entrepreneurs behind the UK's 8,300 forecourt businesses and the vital role they play in their communities. Beyond providing fuel and EV charging, forecourts offer a diverse range of products and essential services, making them an important part of shoppers' everyday lives.

UK forecourts provide around 90,000 jobs, offering local, secure and flexible employment. Around one in seven people working in the sector is under 24, highlighting the important role forecourts play in creating opportunities for young people. Retailers and their teams work hard to build relationships with the communities they serve, with each forecourt serving a catchment of around 2,400 people.

Forecourt retailers continue to invest in their businesses, spending an average of £14,800 per store over the past year. This investment

continues to be linked to managing operating costs, especially utility costs. Refrigeration, air conditioning and in-store technology all contribute to energy demand, making investment in energy efficiency vital as retailers seek to manage costs.

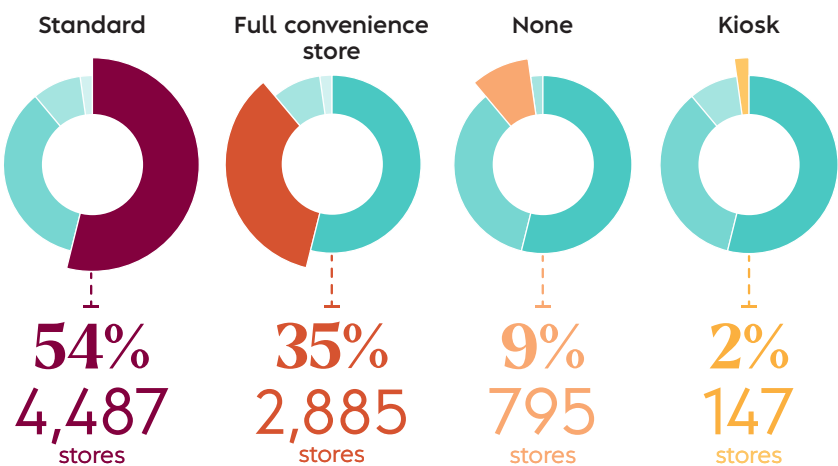
Like the wider convenience sector, forecourts are under pressure from rising trading costs and regulation. Rising road fuel prices, from global supply chain disruption, have also impacted consumer shopping patterns at forecourt shops. These combined factors have again led to a drop in annual investment, signalling early indicators of strain in a sector that remains essential to their communities. With continued innovation, investment, and support, forecourt retailers can strengthen their businesses, support local employment and continue to meet the changing needs of their customers and communities.

There are **8,314** fuel forecourt sites in the UK

7,372 have shops

Source: Green Street 2025

Store types



Source: Green Street 2026

Full convenience store

Likely to be a modern branded shop development offering a wide range of convenience shopping for the motorist on the move. Often has dedicated shop parking.

Standard

Traditional forecourt shop building, selling newspapers, cigarettes, confectionery, oil, plus some food, pre-packed sandwiches, snacks and drink items.

Kiosk

May sell a small amount of oil, cigarettes and confectionery.

None

No operating shop. Unmanned locations and some sites where payment is made in other premises e.g. a car dealership.

Dealer

An independently owned site usually supplied under an agreement with an oil company whose name usually appears on the brand sign. Also includes unbranded sites with no oil company identification.

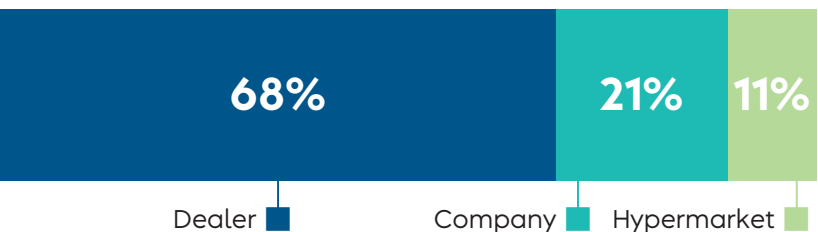
Company

Owned by the supplying oil company whose name appears on the brand sign.

Hypermarket

Owned and operated by the multiple retailers (hypermarket groups). Also includes sites that may be away from the main hypermarket store but are owned and branded by the hypermarket; and includes Co-op stores with Co-op branded forecourts.

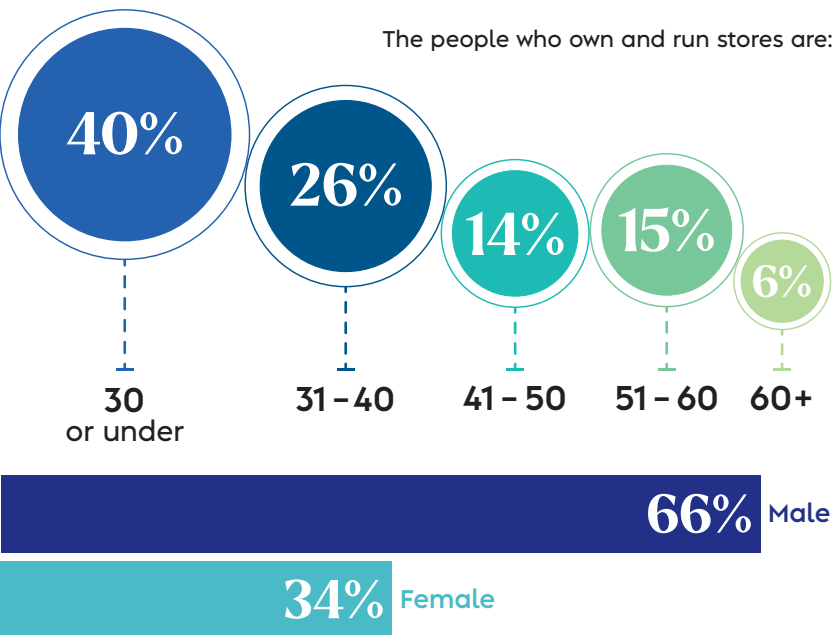
Forecourt shop ownership



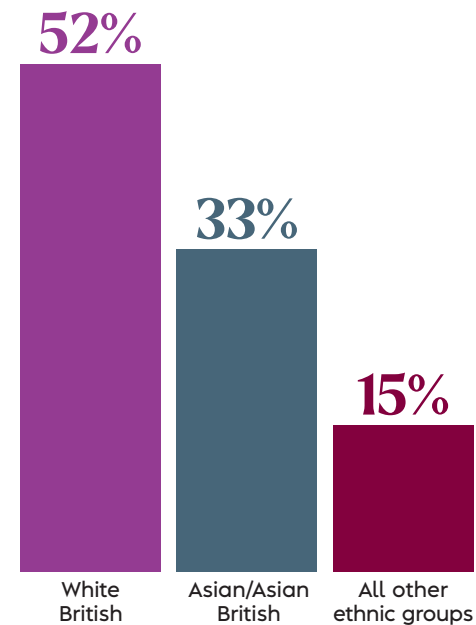
Source: Green Street 2026

Entrepreneurs

The people who own and run stores are:



Ethnicity

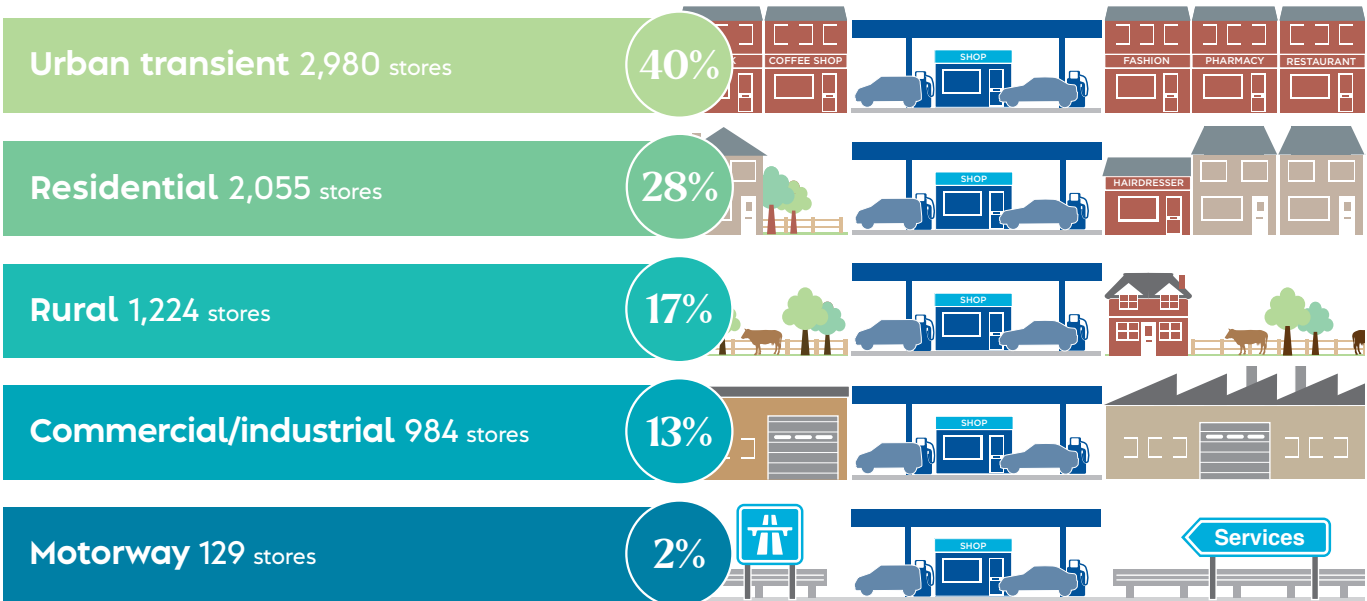


Where we trade

There are **7,372** forecourts with shops in the UK

Source: Green Street 2026

Locations

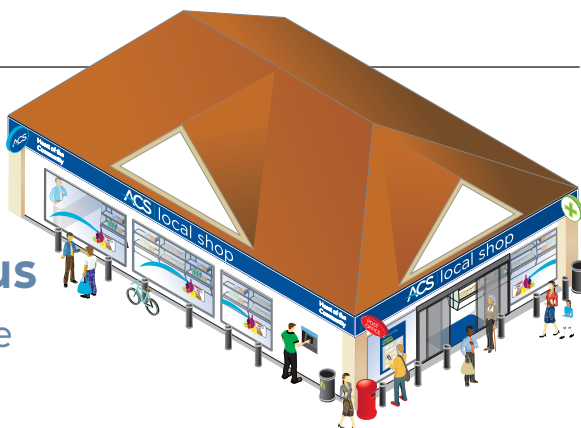


Source: Green Street 2026

Populations around stores



The average forecourt store has **2,436 people** within a **500m radius** compared to the average convenience store (3,299 people within 500m)



Among forecourts in the most densely populated areas the average population within a 500m radius is

7,399 people



Among the most isolated forecourts the average population within a 500m radius is

29 people



What we contribute to the economy

Total value of forecourt sales **£5.8bn**

Source: Green Street 2026

Top 10 forecourt sales categories (multiples only)

Year to August 2025	Year to August 2026		Year to August 2025	Year to August 2026	
£702m	£657m	 Tobacco & vaping	£151m	£147m	 Convenience & deli of which £75m is sandwiches
£486m	£520m	 Soft drinks	£112m	£110m	 Crisps, snacks, nuts & seeds
£319m	£323m	 Beers, wines & spirits	£88m	£92m	 Dairy of which £68m is fresh milk
£254m	£250m	 Non-food	£71m	£78m	 Health, beauty, toiletries & baby
£229m	£226m	 Confectionery	£43m	£44m	 Impulse biscuits

Source: NIQ Scantrack 2026. Data reflects multiple forecourt retailers only

Investment

Over the last year independent forecourts have invested **£14,810** per store **» 60%** funded by own reserves

Source: ACS Investment Tracker / Voice of Local Shops polling 2025-2026

Top ten areas of investment (of those investing)



Source: ACS Investment Tracker / Voice of Local Shops polling (2025-2026)

Vehicle fuel and power

There are around:

2.1m
fully electric vehicles
registered in the UK

1.2m
PHEVs in the UK

Source: Zapmap, September 2026

Across the UK there are:
123,000 electric charging points
at **47,810** locations

7,634 new public devices have been
installed so far this year

Source: Zapmap, September 2026

30,527 fuel
pumps*

60,110 fuel
positions*

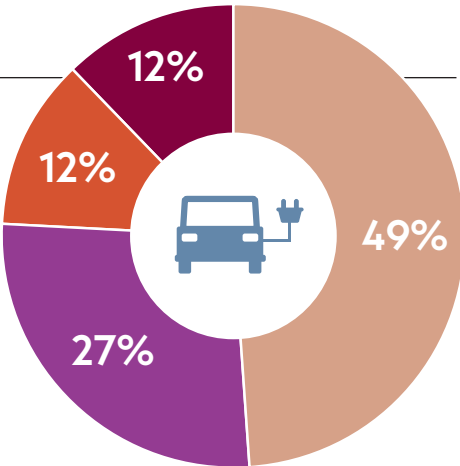
Source: Green Street 2026

UK charging points by type

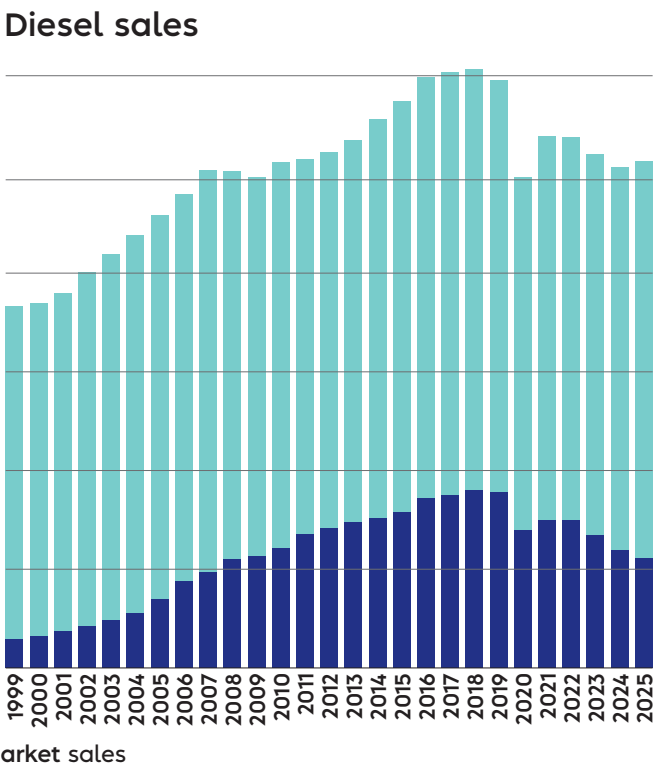
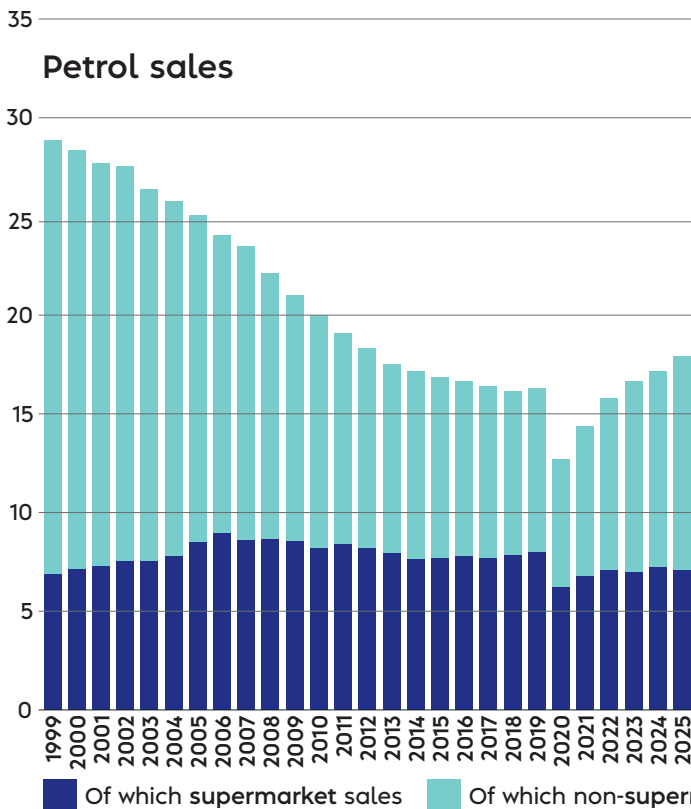


Source: Zapmap, August 2026

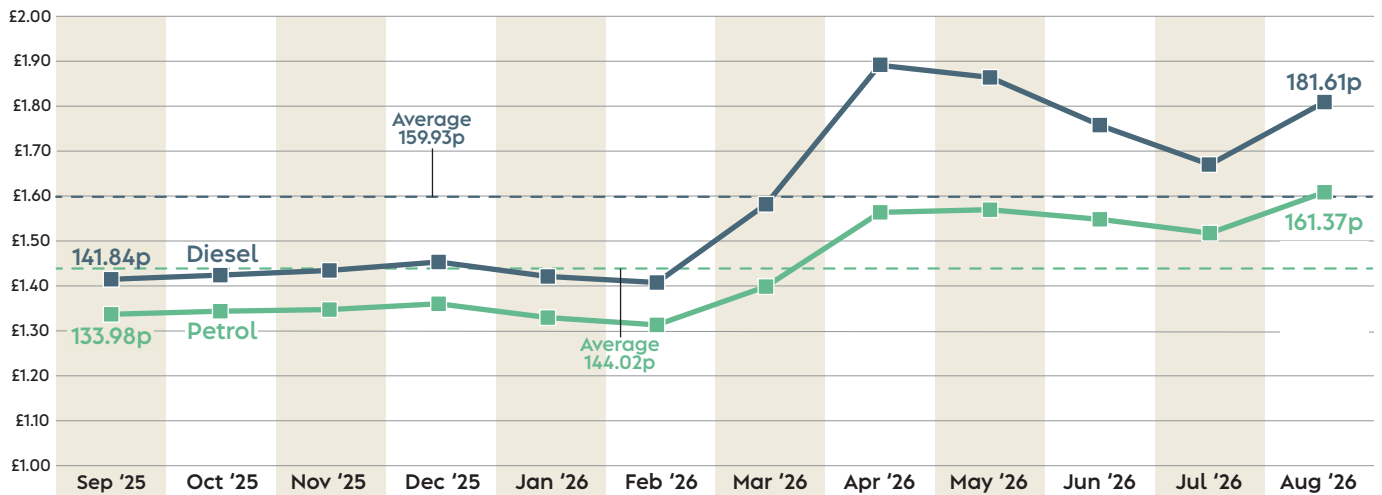
- Standard (less than 8kW)
- Standard Plus (8kw-49kW)
- Rapid (50kw-149kW)
- Ultra-rapid (150+kW)



Fuel sales (millions of litres)

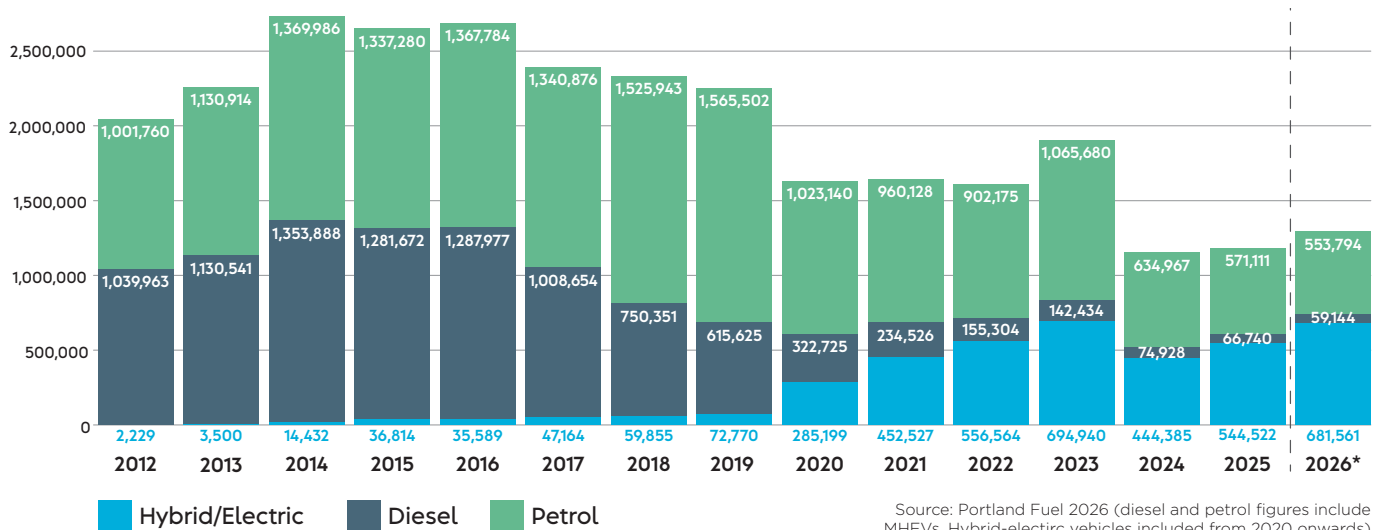


Fuel pricing trends (monthly average)

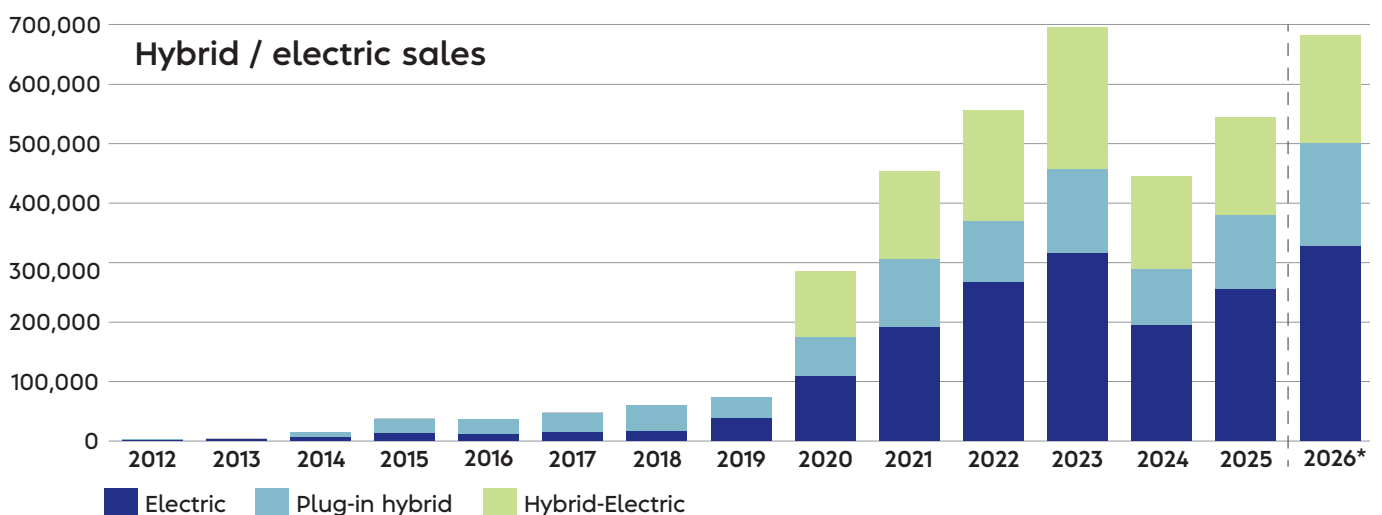


Source: Portland Fuel 2026

New car registrations by fuel type



Source: Portland Fuel 2026 (diesel and petrol figures include MHEVs. Hybrid-electric vehicles included from 2020 onwards)



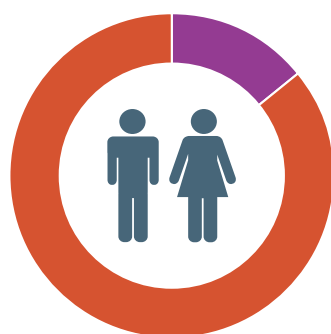
How we operate

89%
of independents
operate **one store**



21%
take **no holiday**
per year

Business origin



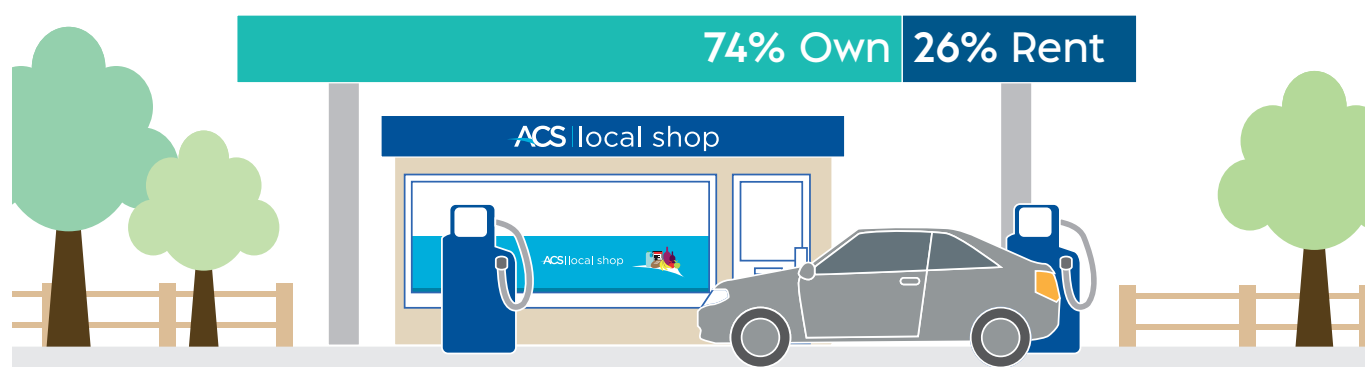
14% inherited family business
86% started business

Employment of family members

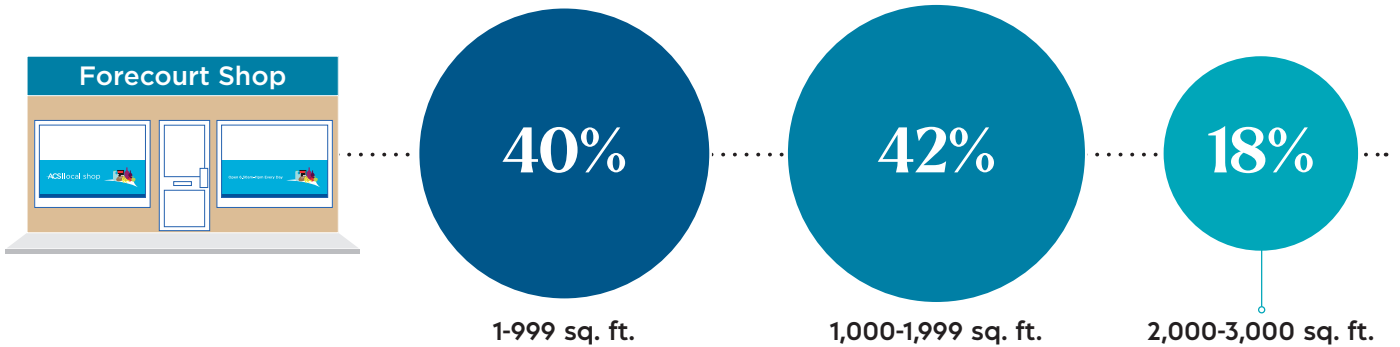
13%
of retailers
employ at
least one
family
member

87%
of retailers
employ no
family members

Premises ownership (independents only)



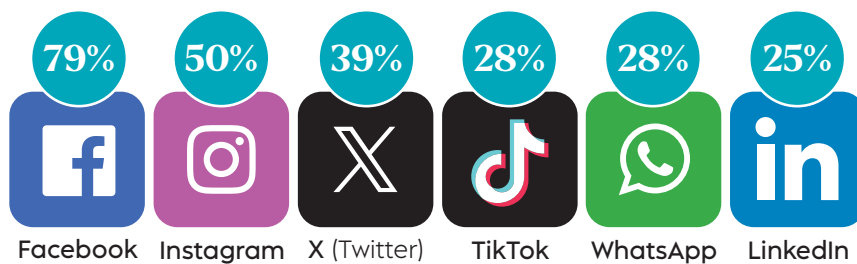
Sales space (independents only)



Opening hours



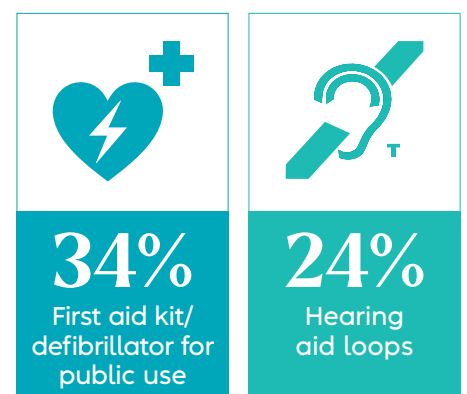
Online and social media presence



Supporting customers



Energy saving*



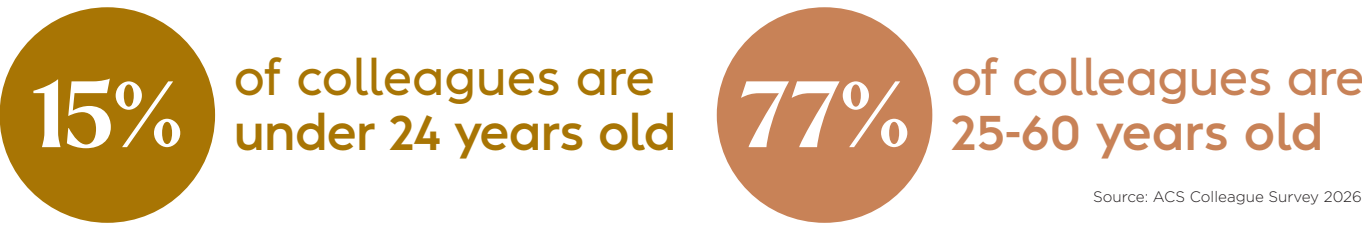
Our colleagues

The forecourt sector in mainland UK provides around

90,000 jobs

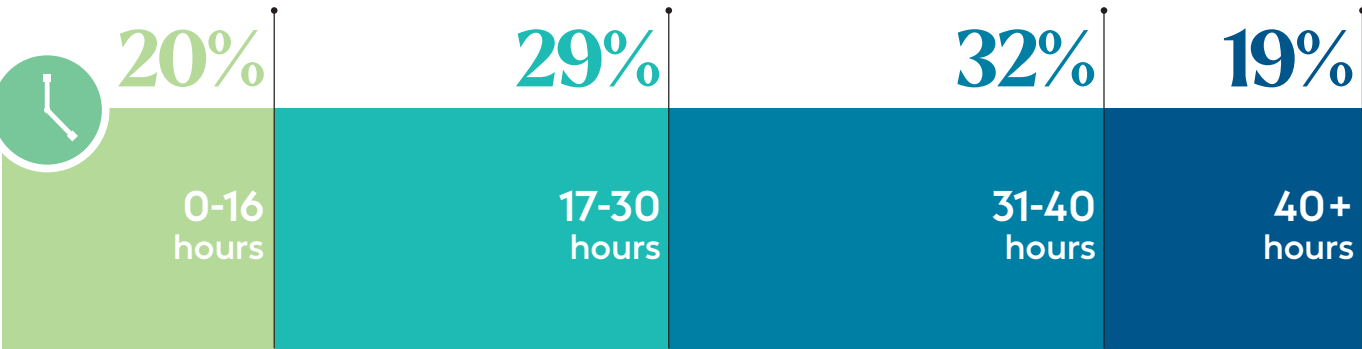
Source: ACS/Lumina Intelligence 2026

Colleagues in the forecourt sector are:



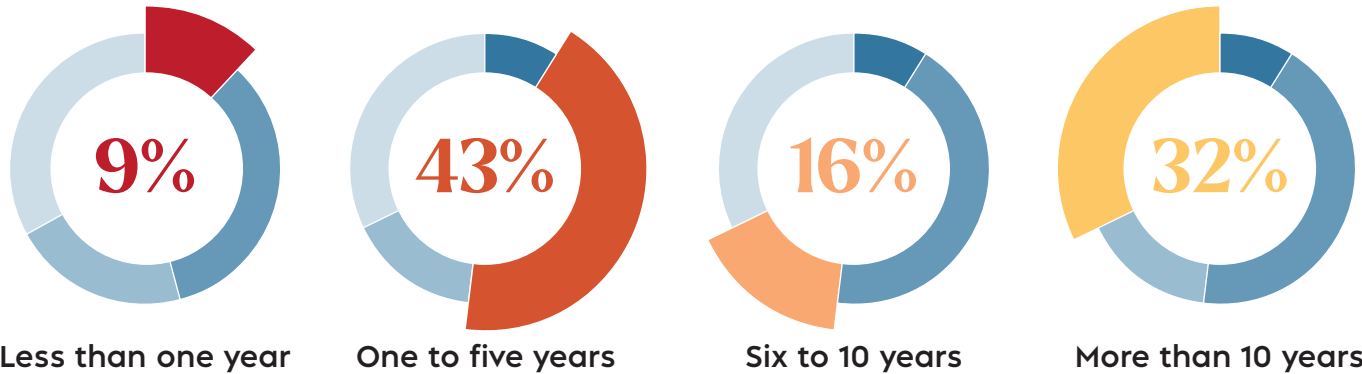
Source: ACS Colleague Survey 2026

Hours worked



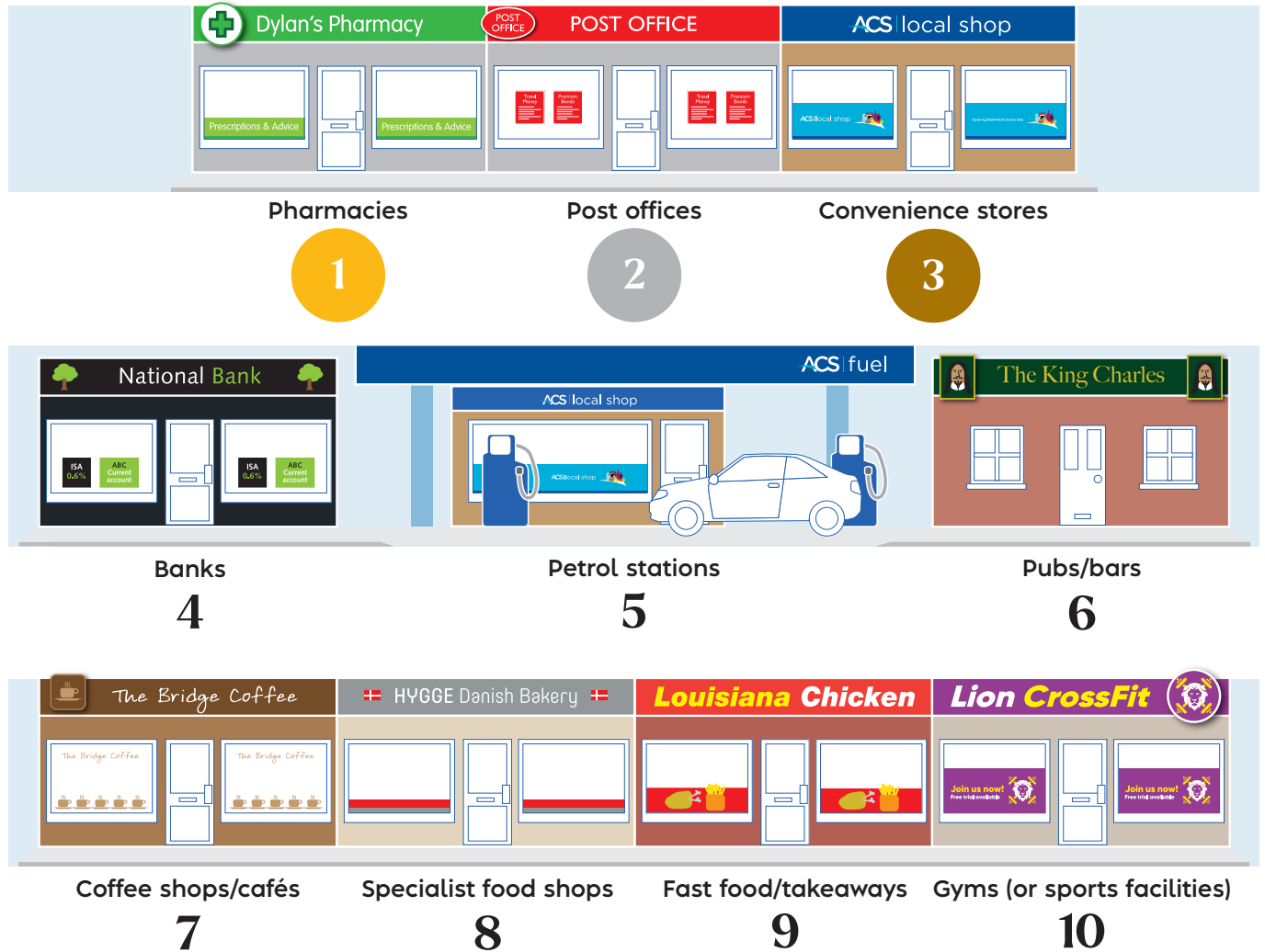
Source: ACS Colleague Survey 2025

Length of employment



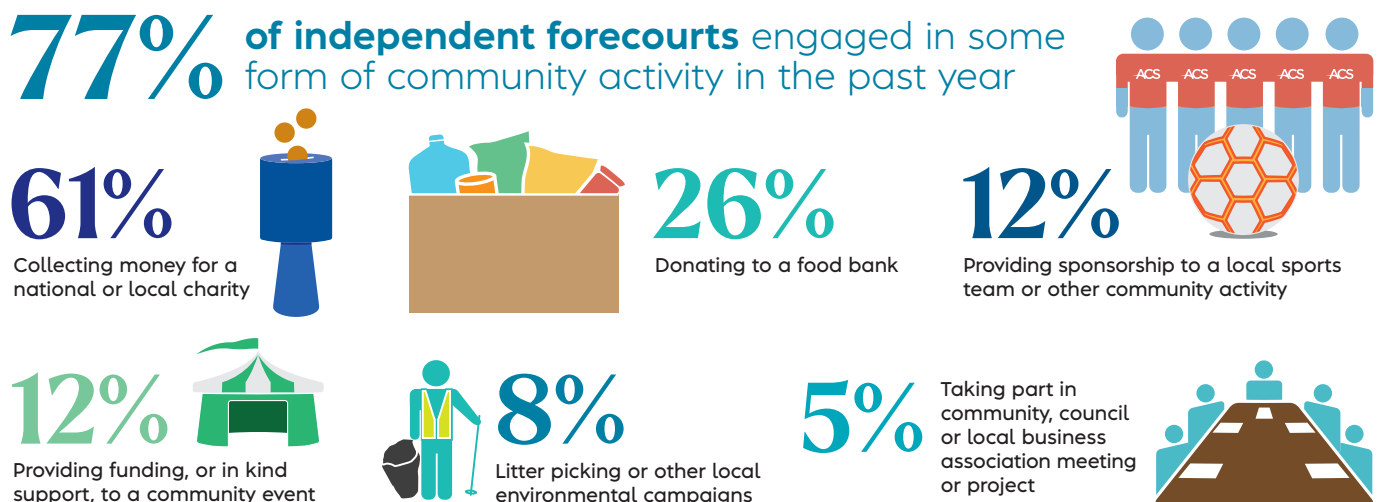
Source: ACS Colleague Survey 2026

Most essential local services



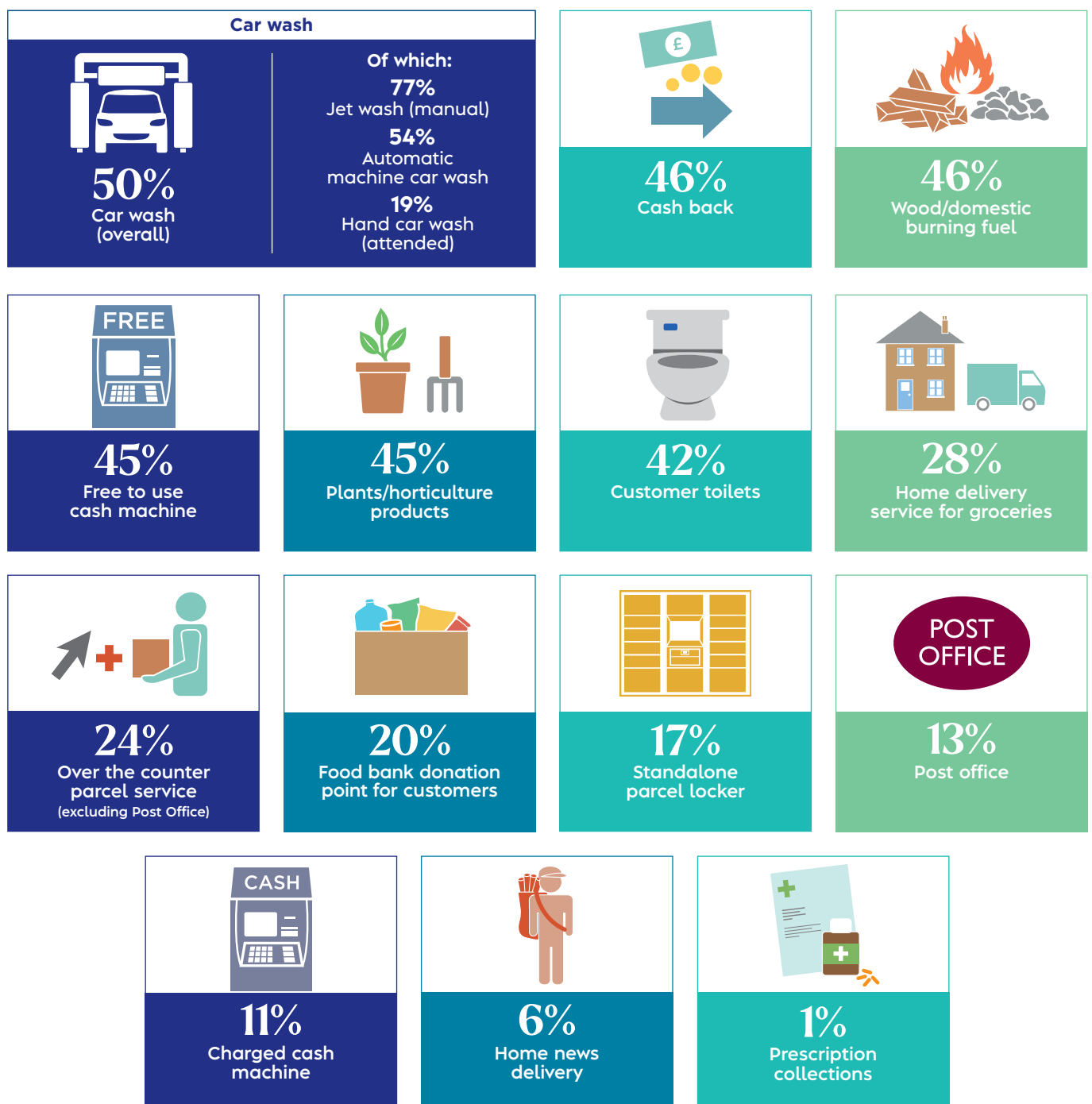
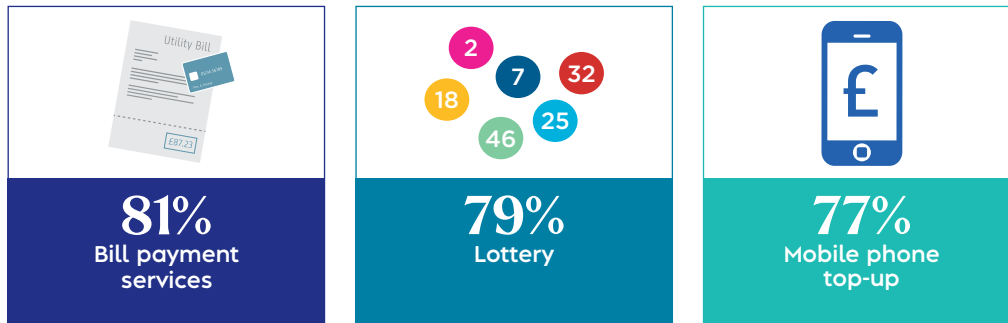
Source: ACS Community Barometer 2026

Community activity

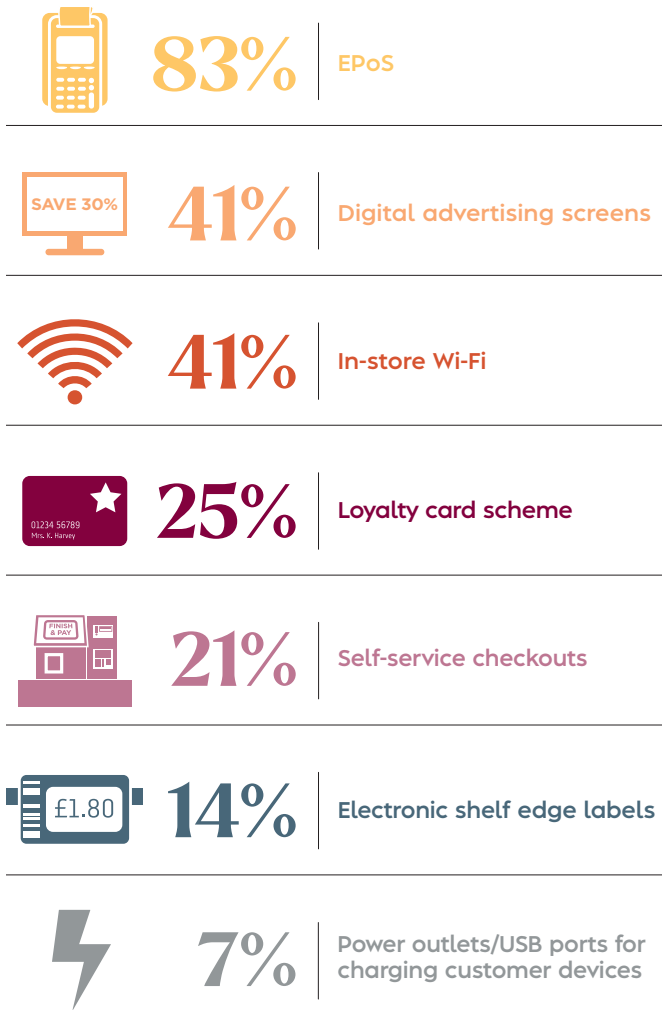


The services and technology we offer

The percentage of forecourts that provide each service is as follows:

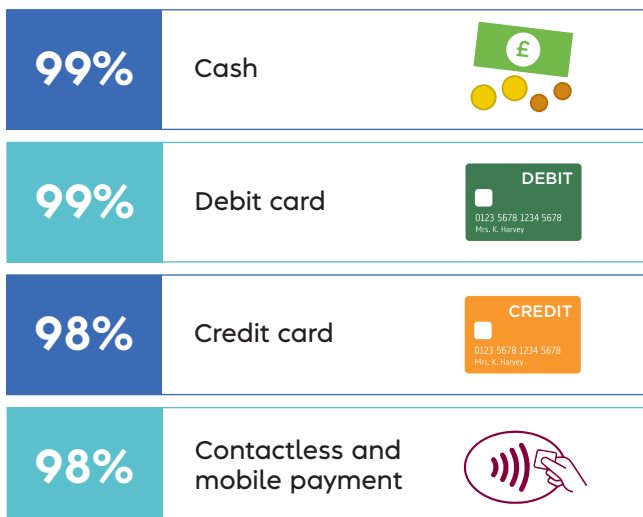


The percentage of forecourts that have each of the following is:



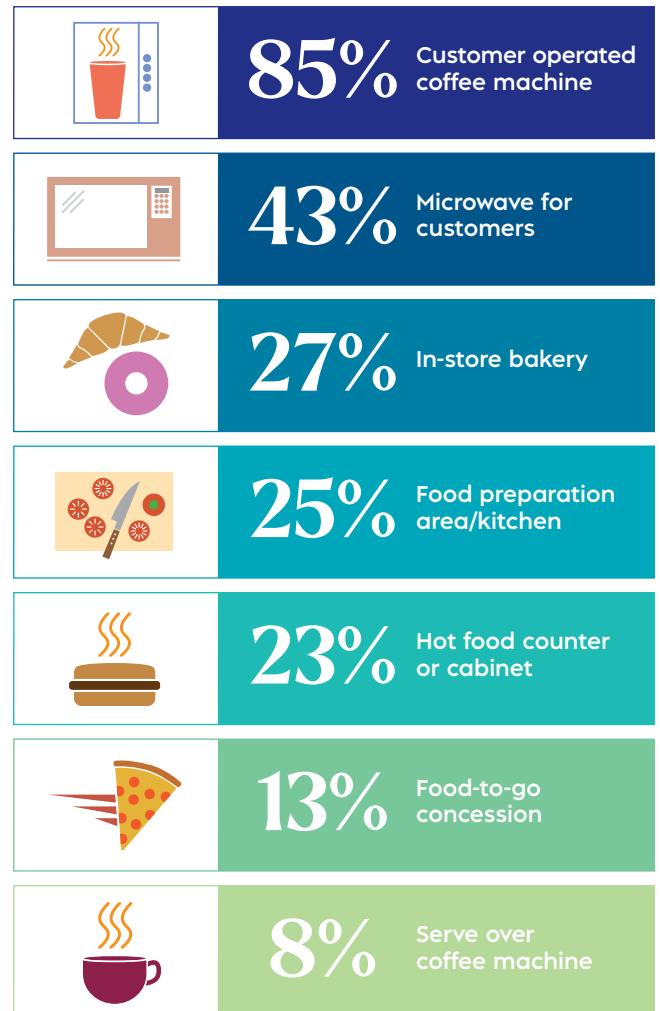
Source: ACS/Lumina Intelligence/Green Street 2025-2026

Payment methods



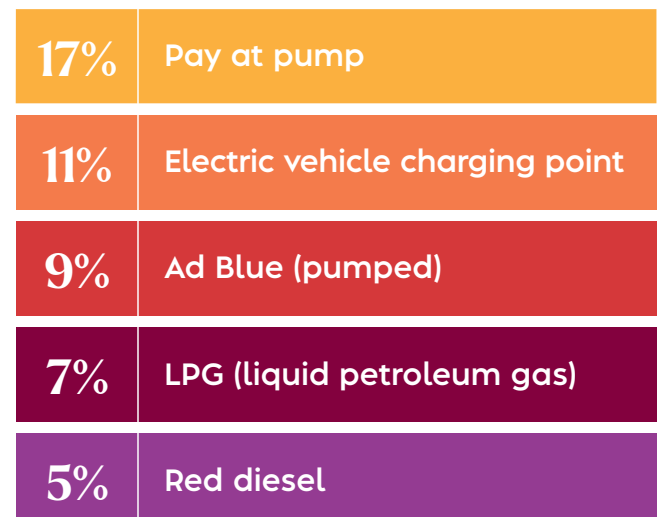
Source: ACS/Lumina Intelligence 2025-2026

Food service



Source: ACS/Lumina Intelligence/Green Street 2025-2026

Forecourt services



Source: Green Street 2026

Who we serve

Forecourt customers are:



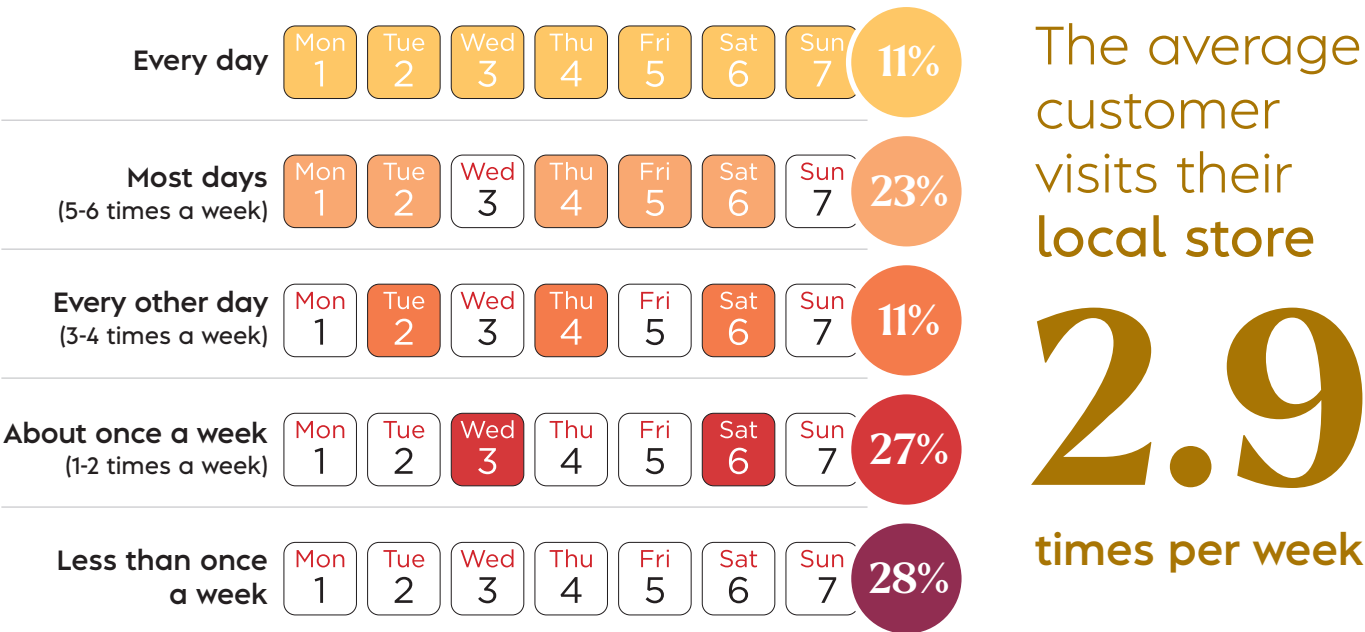
Source: Lumina Intelligence CTP 2026

Customers travel to store



Source: Lumina Intelligence CTP 2026

How often customers visit



Source: Lumina Intelligence CTP 2026

Purchases



Primary data for The Forecourt Report was taken from our 2026 Local Shop Report. This was undertaken by ACS in the form of two surveys:

1. Independent Retailer Survey – A sample of 1,650 independently owned convenience store businesses in the UK. ACS commissioned Lumina Intelligence to aid in the design and delivery of the survey. The survey was carried out over the phone by BCC Marketing between 15th June and 10th July 2026. The telephone survey gathered responses from unaffiliated independent convenience stores, independent forecourt stores and independent stores that are part of a central buying or marketing group (known as 'symbol' groups). These are represented in the survey in the same proportion as they are represented in the market. The survey covers the nine regions of England, along with Wales and Scotland.

2. Multiple Retailer Survey – ACS conducted an online survey of its multiple chain members. This survey was based on the questions asked in the Independent Retailer Survey, where relevant, to ensure consistency and accuracy of results. The results of this survey relate to a sample of 7,561 stores.

The results of these two surveys have been collated according to the proportion of independent and multiple forecourts in the convenience market, in order to determine overall results for the sector.

Population around stores – CACI up to date demographics

Number of stores within 500m of a convenience store – CACI Location Dynamics Spine.

ACS Voice of Local Shops survey

ACS conducts quarterly surveys of 100 independent forecourt retailers, to establish the amount retailers have invested over the past quarter, what they have invested in and how they have funded their investments. The survey also looks at the community activity undertaken by independent retailers. The data included in the report is an average of the 12 months to April 2026. Data in the report refers to independent forecourt retailers only.

Green Street Filling Stations database

Green Street surveyors visit 4,500 forecourts spread over each 12-month period – circa 50% of the UK forecourt network each year. Surveyors are typically ex-oil company or ex-forecourt shop suppliers and are very familiar with the forecourt sector. During a visit, surveyors update data and take photos of the forecourt sites. specified within the report the data refers to forecourts specifically with a shop located on site.

Portland Fuel

Portland Analytics' price assessments reflect trading transactions conducted in North West European wholesale markets. This is further supplemented through analysis of a wide range of historical customer, supplier and government data sources.

Zapmap

Data correct at time of printing. For more information about the data please visit: <https://www.zap-map.com/ev-stats>

NIQScantrack – Sales Category data 2026

The data included in the report refers to sales for multiple forecourt retailers only. Category definitions are revised throughout the year to align with retailers and therefore categories may not be directly comparable with previous forecourt reports.

Convenience Tracking Programme 2026 – Lumina Intelligence

This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in-store. 'Forecourt shoppers' refers to customers shopping specifically at forecourt stores rather than standalone convenience stores.

Community Barometer – More in Common

The Community Barometer report is put together from the findings of an Omnibus poll of 1,000 UK consumers about their local area, conducted by More in Common in July 2026.

For more Community Barometer results please visit the ACS website or email rosie.wiggins@acs.org.uk

Throughout the report, where percentages do not add up to 100%, this is due to rounding.

About ACS

The Association of Convenience Stores is a trade association representing local shops across the UK.

We represent our members through effective lobbying, industry leading advice and networking opportunities for retailers and suppliers.

Our membership includes a diverse range of convenience store retailers, from stand-alone family run independent stores to symbol groups and multiple convenience stores. These retailers operate in neighbourhoods, villages, on petrol forecourts and in city centres.

ACS' core purpose is to lobby Government on the issues that make a difference to local shops.

We represent the interests of retailers on a range of issues, including business rates, energy, regulation, planning, alcohol and many more.

ACS produces several reports throughout the year, looking in detail at different aspects of the convenience store sector, all of which are available free to members.

We can also provide further breakdowns of The Forecourt Report data to members. Please contact Rosie Wiggins at rosie.wiggins@acs.org.uk for further details.

For more information about ACS, visit our website.

ACS.org.uk



Acknowledgements

This report would not have been possible without the support of a number of industry and research organisations that have helped by providing data.



Contacts

For more details on this report, contact Rosie Wiggins via email at rosie.wiggins@acs.org.uk

Our website www.acs.org.uk Our social media @ACS_localshops on X, Instagram and TikTok
Association of Convenience Stores on LinkedIn, Facebook and YouTube