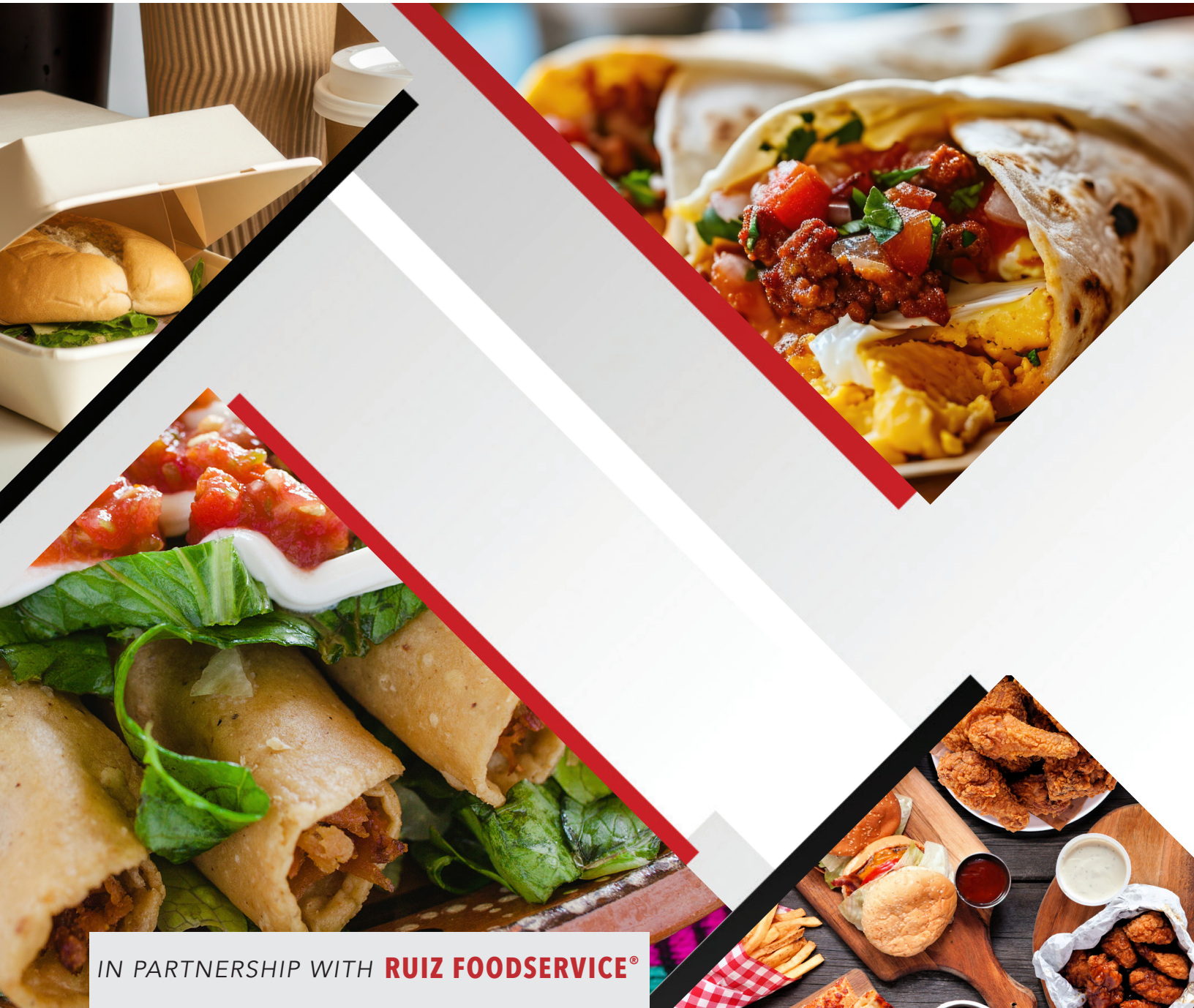


THE C-STORE MEAL DESTINATION PLAYBOOK

*Turn everyday fuel traffic into higher-margin
food sales and bigger baskets.*



IN PARTNERSHIP WITH **RUIZ FOODSERVICE®**

Table of Contents

3	Introduction
4	Part 1: The C-Store Foodservice Shift
7	Part 2: Where the Revenue Is Coming From
9	Part 3: Food That Drives the Trip
11	Part 4: Creating More Value Per Visit
13	Part 5: Execution Is the Revenue Multiplier
16	Part 6: The Foodservice Performance Scorecard
18	Part 7: The 12-Month Growth Plan
22	Make the Most of Every Hot Food Opportunity

ALL IMAGES FROM PAGES 1-25 OF THIS REPORT ARE CREDITED TO ADOBE STOCK

Arrowfly
Food | Retail | Hospitality

Publisher of CStore Decisions

Peggy Carouthers
EDITOR AND VICE PRESIDENT
OF THE CONTENT STUDIO

Ya'el McCloud
EDITOR

Drew Filipski
EDITOR

Erin Canetta
ART DIRECTOR

Erin Canetta
ART DIRECTOR

Erin Del Conte
EDITOR-IN-CHIEF

CStore Decisions is a registered trademarks of Arrowfly, LLC. All content in this report is copyright © 2026 Arrowfly, LLC. No part of it may be reproduced without the expressed written permission of Arrowfly, LLC.



Introduction

A CUSTOMER PULLS IN for fuel, walks inside for coffee, and leaves without breakfast. Another passes the roller grill on the way to the beverage cooler, then heads to a restaurant for lunch. C-store operators have already won the stop. The harder question is how to win the food purchase.

That question looks different at every location. The morning rush may call for a hot breakfast customers can grab without waiting. Lunch may depend on a meal deal that is easy to spot and worth the price. Later in the day, a stocked hot case or a new take on a roller-grill favorite may give shoppers a reason to choose the store again. None of those opportunities matters for long if the food is unavailable, the quality varies, or the work is too complicated for store teams to repeat.

Foodservice growth is an operating question as much as a menu question. What are customers coming in for? What are they buying elsewhere? Which products earn their space, and which changes can employees execute consistently across shifts and stores?

This report follows those questions from opportunity to action, examining where foodservice revenue can grow, what brings customers back, how to build more value into each visit, and which measures help operators decide what to do next, with an aim to show retailers how to build on familiar hot food formats to give customers more ways to buy without starting over.

Part 1: The C-Store Foodservice Shift

Foodservice is giving c-stores more ways to compete for meals, snacks, and everyday visits.



TWENTY YEARS AGO, foodservice generated about one out of every eight dollars spent inside a convenience store. Today, it accounts for more than one out of every four—and an even larger share of gross profit.

This is according to the National Association of Convenience Stores (NACS)'s *State of the Industry Report®* of 2025 Data, who also reports that foodservice accounted for 28.5 percent of in-store sales and 38.9 percent of in-store gross profit dollars in 2025. That's a significant shift from 2005, when the category accounted for just 11.9 percent of in-store sales. Prepared food is driving much of that growth, accounting for nearly three-quarters of foodservice sales in 2025.

The numbers show how much foodservice's role in the convenience channel has changed. Food is no longer simply an add-on to a fuel stop or another way to capture an impulse purchase at the register. For many operators, foodservice is a critical source of sales and profit—and a way to compete for customers.

C-stores have long faced skepticism about food quality, especially compared with restaurants. Recent research suggests that reputation is beginning to improve.

In its 2026 Convenience Stores Preview Report, Datasential found that 40 percent of consumers believe the variety at their favorite c-store is getting better, compared with just five percent who believe it is get-

"A customer who stops for fuel and discovers a breakfast sandwich they enjoy has a reason to consider that store for breakfast again."



ting worse. Thirty-five percent say taste and quality are improving, while 33 percent see improvements in freshness. Consumers are also noticing gains in cleanliness, uniqueness, and speed of service.

Despite those gains, c-stores still have ground to make up with consumers. Research presented at the 2025 NACS State of the Industry Summit found that only 18 percent of consumers completely agree that c-stores are as capable as quick-service restaurants when it comes to offering fresh, quality foodservice.

So, while the perception gap is narrowing, it hasn't disappeared. Operators must overcome long-held perceptions of convenience-store food by delivering the quality, freshness, variety, and consistency consumers expect from other foodservice channels. Each positive food experience can help change consumers' expectations. A customer who stops for fuel and discovers a breakfast sandwich they enjoy has a reason to consider that store for breakfast again. The same applies to a shopper who finds a reliable lunch, a favorite roller-grill item, or a convenient dinner on the way home. Over time, those purchases can change the role a c-store plays in a customer's routine, shifting foodservice from an incidental purchase to a specific reason to choose that location. Better consumer perceptions give operators a chance to turn c-stores into intentional food destinations.

Convenience is the channel's built-in advantage, but today's foodservice opportunities go beyond customers grabbing something to eat while they fill their tanks.

Datassential found that 86 percent of consumers consider c-store prepared foods appealing for a quick bite, while 84 percent see them as a good fit for a road trip. Eighty-three percent find them appealing when they need something to hold them over until a full meal, and 78 percent turn to them while running errands.

C-stores are also competing for more traditional meals and workday occasions. Nearly three-quarters of consumers consider c-store prepared food appealing for a casual lunch; 70 percent for something to eat on the way to work; and 65 percent for a work break. Another 65 percent consider c-store food appealing for a last-minute or unplanned dinner.

Those occasions give c-stores more opportunities to capture food sales throughout the day, while the variety inside the store lets operators meet different customer needs. A customer looking for lunch might want a hot prepared item, while another heads to the roller grill. Someone looking for a lighter option can choose from the grab-and-go case, while customers who need something portable can pick up a handheld and get back on the road. C-stores can serve all of those needs in the same location, which

gives customers more flexibility than many traditional restaurants can offer.

That flexibility can translate into growth across multiple dayparts. Datassential found that 60 percent of c-store operators surveyed reported increased food and beverage sales during the past year, up 13 percentage points from 2023. Breakfast led the growth; 64 percent of operators that offered breakfast reported increased sales during that daypart. Fifty-five percent reported growth at lunch.

C-stores also have something restaurants cannot easily replicate: the ability to satisfy several needs during a single stop.

Consumers can fuel their vehicles, grab a beverage, buy groceries or snacks, and pick up a meal without making another trip. They can also choose among multiple foodservice formats, from made-to-order and grab-and-go to hot cases and roller grills. Con-

venience, choice, and speed give c-stores a strong foundation for capturing more foodservice sales.

But having food available does not automatically make a store a foodservice destination. NACS research found that 28.7 percent of c-store shoppers in 2024 planned to visit a quick-service restaurant within 30 minutes of their c-store visit. Among those shoppers, 37.9 percent said they wanted a food item the c-store didn't offer, while 27.3 percent had purchased food at the c-store but still wanted additional options elsewhere.

Those customers have already brought their business onto the property, which gives operators a chance to capture more of their food spending before they leave. Closing that gap doesn't mean trying to turn every convenience store into a restaurant. Instead, operators can capitalize on what the channel already does well and give customers more reasons to choose c-store foodservice.



To do this, operators must understand which products and formats generate traffic, where untapped daypart opportunities exist, and how food and beverages can work together to increase the value of each visit. They must also execute consistently. A strong menu cannot build loyalty if customers find empty displays, inconsistent quality, or unavailable favorites.

Foodservice has already earned a much larger role in the c-store business. Now, operators can build on that growth by getting more from each daypart, product, and customer visit.

For operators, the question is no longer whether foodservice can drive growth, but where that growth will come from and how to capture it.

Part 2:

Where the Revenue Is Coming From

New revenue opportunities may already be walking through the door.

AS FOODSERVICE TAKES UP a larger share of convenience store sales, the next question for operators is where to look for additional growth.

There isn't a single answer. Rather, c-store foodservice revenue comes from a mix of formats, dayparts, and occasions. Operators can choose the opportunities that best fit their stores, customers, and existing capabilities.

Prepared food is the logical place to start. According to NACS, prepared food accounted for 73.9 percent of foodservice sales in 2025, up from 66.4 percent in 2021. Packaged beverages ranked second among in-store categories, accounting for another 18.7 percent of sales.

Operators don't need to build a made-to-order kitchen or expand the menu to capture more of that foodservice opportunity. They can grow sales by using existing formats, filling daypart gaps, and giving customers more reasons to buy food throughout the day.

Made-to-order foodservice helps c-stores compete for customers, but it is only one part of the opportunity. Grab-and-go cases, hot cases, and roller grills can extend a foodservice program without requiring the same labor or space as a full kitchen.

The right mix depends on the store and its customers. A location serving commuters may find opportunities in portable breakfast foods and coffee. A highway store may focus on hot grab-and-go products and road-friendly snacks. Stores near offices, schools, or residential neighborhoods may find opportunities at lunch, afternoon snack times, or dinner.

The roller grill is one example of how operators can generate new revenue from an established c-store platform. Once associated mainly with hot dogs and sausages, today's roller grill handles a much broader product mix.

Datassential found that 68 percent of surveyed c-store operators offered taquitos in 2026, up from 53 percent in 2023. During the same period, the number of c-stores offering hot dogs declined from 95 percent to 73 percent.

So, while familiar roller-grill staples haven't been replaced, there are new opportunities to use already-established equipment to offer a broader range of flavors and reach more customers throughout the day.

Roller grills can also bridge the space between a snack and a meal. Customers can purchase one item for a quick bite or multiple items for something more



substantial. The products are portable, visible, and require little to no ordering interaction. Those attributes fit the speed and convenience customers expect from the c-store channel.

A broader assortment also gives operators more ways to use the roller grill throughout the day. Breakfast products can serve morning commuters, while handheld snacks and heartier options can carry the platform through lunch, afternoon snack times, and dinner. That versatility can help operators get more sales from equipment already in place.

Daypart expansion offers another path to foodservice sales. Datassential found that 60 percent of surveyed operators experienced food-and-beverage sales growth during the previous year, up 13 percentage points from 2023. Breakfast posted the strongest daypart performance, with 64 percent of operators that offered breakfast reporting increased sales. Lunch followed at 55 percent.

Breakfast fits the c-store proposition particularly well. Customers commute, buy fuel, and stop for coffee in the morning, which gives operators a chance to convert existing traffic into food purchases.

The opportunity extends beyond traditional meals. Datassential found strong consumer interest in c-store prepared food for quick bites, something to hold them over until a full meal, eating while running errands, and food for energy. Sixty-five percent found c-store prepared food appealing for a work break.

Daypart analysis can reveal gaps between store traffic and foodservice sales. Operators can identify periods when traffic remains healthy but foodservice sales fall off, then determine whether the assortment gives those customers a reason to eat.

Grab-and-go is another way to capture demand throughout the day without adding an ordering wait. The format accommodates a broad assortment, from sandwiches and wraps to breakfast foods, snacks, and hot prepared products.

Placement for this section can help turn existing store traffic into food sales. Among consumers in

Datassential's research who bought something they had not intended to purchase, 38 percent chose a prepared-food item. Most said they encountered those purchases while moving through the store or near checkout. Hot cases, refrigerated cases, and roller grills put food in the customer's path and keep the purchase quick.

Beverages create another major revenue opportunity, especially when operators connect them with food purchases. NACS reported that packaged beverages accounted for 17.9 percent of in-store sales and 21.2 percent of gross profit dollars in 2024. Thirty-seven percent of customers who purchased a packaged beverage also bought prepared food during the same trip. Together, foodservice and packaged beverages generated 60.8 percent of in-store profit dollars.

This relationship works in both directions. A coffee customer can add breakfast, while someone buying lunch or a roller-grill item can add a fountain or packaged beverage. C-stores can also draw from a beverage selection that most restaurants can't match, which gives operators more combinations to sell throughout the day.

Finding the best opportunity starts with examining how customers already use each store. Morning fuel and coffee traffic may reveal a breakfast gap. Strong afternoon transactions paired with weak food sales may signal room for snacks or portable hot foods. A busy roller grill may have room for a broader assortment, while stores without the labor or space for extensive made-to-order foodservice can lean on hot cases or refrigerated grab-and-go.

In all these scenarios, the common thread is existing traffic. Operators can build around the customers already walking through the door and give them more reasons to buy food while they're there. Growth can come from capturing breakfast customers who previously bought only coffee, turning afternoon traffic into snack sales, expanding what existing equipment can sell, or converting beverage trips into food purchases.

The revenue is already walking through the door, but the challenge is to find more ways to maintain it.

Part 3:

Food That Drives the Trip

Familiar favorites and fresh flavors give customers more reasons to come back.

RESTAURANTS FREQUENTLY CHANGE their menus to keep guests coming back. But a strong c-store food-service program doesn't need to reinvent the wheel to give customers a reason to return. Often, the biggest traffic drivers are foods consumers already know they like and want.

Pizza, hot dogs, taquitos, burritos, breakfast sandwiches, and other c-store staples have staying power for a reason. They are familiar, portable, and easy to understand—qualities that matter when customers need to make quick food decisions. Operators can build on those favorites with new flavors, LTOs, and other innovations that keep the menu fresh.

This balance between familiarity and innovation matters as c-stores compete with restaurants for customers. Datassential's 2026 research shows the strength of familiar foods in c-store programs. Among surveyed operators, 93 percent offer breakfast sandwiches, 90 percent offer hot sandwiches or wraps, and 73 percent offer pizza. Seventy-three percent offer hot dogs, 70 percent offer burritos, and 68 percent offer taquitos.

Consumers like the variety, too. Three-quarters of consumers surveyed by Datassential said they are satisfied with the variety of prepared foods at their favorite convenience store.

Familiar core items can become part of a store's foodservice identity. When customers know they can find a favorite pizza, breakfast sandwich, or roller-grill item regularly, that food can become part of their routine. Consistently delivering familiar favorites gives customers a reason to associate a particular store with food, not just convenience.

Once operators establish those favorites, they can

use them as a starting point for new items. Some of the strongest innovation begins with foods customers already understand. Datassential calls the strategy "elevating the familiar." Adding new flavors, ingredients, or preparations to established favorites gives consumers the excitement of discovery through foods they already enjoy.

Many c-stores use that strategy now. Recent limited-time launches have included Taco Pizza® at RaceTrac and 7-Eleven offerings such as Bacon Lover's Pizza®, a Jalapeño Ranch Chicken Taquito®, and a Bacon Q Breakfast Burrito®. The formats stay recognizable, while new flavors and toppings give customers something different to try.

Some familiar formats offer plenty of room for flavor innovation. For example, pizza can carry different sauces, proteins, and toppings, while taquitos and burritos can incorporate different fillings and spice profiles. Toppings and condiments can transform hot dogs into loaded offerings. A different sauce, cheese, or protein can give a familiar sandwich a whole new flavor profile.

Handheld foods offer another advantage because operators can use familiar formats across different dayparts and needs. A breakfast burrito can serve the morning commute, while taquitos, burritos, flautas, or other portable foods can work as snacks or more substantial meals later in the day. Customers recognize the format, but operators can change fillings, flavors, and portion sizes to create variety.





These variations help operators respond to changing flavor preferences while preserving the core menu. Datassential found clear generational differences in the condiments consumers want with prepared foods. While traditional ketchup, mustard, ranch, and barbecue sauce remain popular overall, millennials showed greater interest than older consumers in options such as hot sauce, Asian sauces, flavored mayonnaise and ketchup, and Sriracha. Gen Z showed more interest than older consumers in flavored ketchup and Tajín.

Global flavors give operators another way to differentiate familiar foods. Adding an emerging flavor to a recognizable handheld or pizza lets customers try something new in a format they already know.

Younger consumers are especially interested in experimentation. Technomic research presented at the 2025 National Restaurant Association Show found growing consumer interest in new flavor experiences, especially among Gen Z and millennials. Familiar formats make those experiences approachable. Heat, regional flavors, and unexpected combinations add something new while preserving recognizable menu foundations.

LTOs offer another way to balance familiarity and innovation. Operators can introduce a new flavor, filling, or topping for a defined period without committing permanent menu space to an unproven product. Strong performers can return or earn a permanent place on the menu. Even when an LTO doesn't last, its performance can help guide future menu decisions.

LTOs create urgency, too. Core favorites provide reliability, while temporary offerings give regular customers something they haven't seen on previous visits. That newness gives them another reason to revisit a familiar store for food.

Operators can also innovate without adding layers of complexity. The Convenience Foodservice Vision Group recommends developing new menu offerings from existing ingredient combinations when possible. Using existing products in new ways lets retailers introduce choices without adding unnecessary ingredients or processes that add prep time.

The same principle applies to customization. Datassential found that 52 percent of consumers are interested in customizable burritos or tacos assembled to order, while another 52 percent are interested in customizable pizza. Toppings, sauces, and condiments create more flavor options without requiring a different base product for each one.

A strong core menu is the foundation for innovation. Customers expect dependable items that deliver the same experience from visit to visit. But new flavors, LTOs, and selective customization can build on that familiarity without forcing operators to overhaul the menu.

This approach can help c-stores capture purchases that might otherwise go to restaurants. NACS data shows that 28.7 percent of c-store shoppers planned to purchase food from a quick-service restaurant within 30 minutes of their c-store visit. Among those shoppers, 37.9 percent said they planned to buy elsewhere because the c-store lacked appealing menu options.

Operators don't need to chase every food trend to close that gap. Instead, lean on dependable favorites to give customers something to crave and return for. Strategic innovation gives customers something new to discover, and operators more ways to keep food purchases on the property.

The strongest c-store menus give customers confidence they'll find something they already love while providing a reason to look for what's new.

Part 4:

Creating More Value Per Visit

Bundles, beverage attachment, and smart merchandising can build bigger baskets.

GETTING CUSTOMERS THROUGH THE DOOR is only one part of the foodservice revenue equation. Operators can also grow revenue by increasing the value of each visit.

Convenience stores have an advantage because customers already shop across categories, which creates natural opportunities to build larger baskets. A breakfast stop can include coffee, while lunch might pair with a packaged beverage and a road-trip purchase can combine hot food, snacks, and drinks for several people.

Growing basket size depends on giving customers more reasons to buy. With many consumers watching their budgets, operators must make each purchase feel worth the money.

Datassential research presented at the 2026 NACS State of the Industry Summit found that 64 percent of consumers want a good deal but aren't willing to sacrifice food quality or experience to get one. Consumers also noticed price increases more often at quick-service restaurants than at c-stores. Fifty-seven percent reported noticing higher quick-service restaurant prices, compared with 41 percent at c-stores.

That gap gives c-stores room to compete on the overall value of the visit, including quality, convenience, and price.

Portability adds to that value. Food that customers can take to the car, workplace, or next destination fits the c-store mission. Handheld products can work as a snack on their own or become a more complete meal

when paired with another food or beverage. That versatility also gives operators several ways to build bundles around products customers already know.

A breakfast sandwich and coffee, roller-grill items with a fountain drink, or a hot entrée paired with a packaged beverage can increase the number of items in the transaction while making the purchase easier for customers. Bundles also simplify decisions during a quick stop.

Portable hot foods can work especially well as bundle anchors because customers can choose the amount of food that fits the trip. One roller-grill item might satisfy a snack occasion, while two items and a beverage create a more substantial meal. Hot-case and grab-and-go products give operators similar flexibility without requiring customers to wait for an order.

C-store operators already use bundles to compete with restaurant value offers. EG America reported strong traffic from a \$3 breakfast sandwich and coffee promotion and "two for" roller-grill items for \$4. Rutter's has used \$8 combinations such as a burger, fries, and beverage or a breakfast sandwich, hash browns, and coffee. The retailer uses basket analysis, loyalty insights, and daypart demand to identify products customers already buy together.

Bundles don't have to discount every item to deliver value. Customers simply need to understand what they're getting for the price. Giving them choices within the bundle can add value, too, especially in a channel built around assortment.

Beverages are a natural place to start. NACS found that 37.4 percent of shoppers who purchased a packaged beverage also bought prepared food during the same trip in 2024. Foodservice and packaged beverages together accounted for 60.8 percent of in-store profit dollars.

Those numbers show the potential of food-and-beverage attachment. Customers who walk in for coffee, a fountain drink, or a packaged beverage are potential foodservice customers, and food customers create the same opportunity for beverage sales.

Operators can encourage that attachment through combinations that fit the trip. Coffee and breakfast foods work for the morning commute. Cold beverages pair with lunch and hot prepared foods. Energy drinks can accompany portable foods for customers who need fuel for a workday or road trip.

C-stores also have the advantage of assortment. Unlike most restaurants, convenience retailers offer fountain drinks, coffee, other dispensed beverages, and a large packaged-beverage selection under one roof. Customers can add snacks and other merchandise, too.

That range lets operators build bundles around different tastes and price points instead of forcing every customer into the same combination. Pilot, for example, tested an \$8 'Fuel Kit' in 2025 that combined three chicken tenders with the customer's choice of a regular-size candy bar, a small bag of Frito-Lay chips, and any-size fountain drink.

Operators can also cross-sell without creating a formal bundle. Product placement and merchandising can put complementary items in the same decision path. A beverage cooler near prepared foods, signage suggesting a drink with a roller-grill purchase, or a breakfast display near coffee can remind customers of items they didn't plan to buy.

Datassential's impulse-purchase research shows how often that happens. Among consumers who made an unplanned purchase during their last c-store visit, 38 percent bought prepared food. Seventeen percent said their unintended purchase was part of a



meal deal, combo, or bundle, while 16 percent said a special display influenced the purchase.

Premium options offer another way to increase ticket size. A customer may pay more for a larger portion, premium protein, specialty beverage, or upgraded version of a familiar item when the upgrade delivers enough value.

Offering a range of price points lets customers decide how much they want to spend. A foodservice assortment can include lower-priced staples alongside premium options. The same customer may choose a basic breakfast during the workweek and splurge on a more indulgent option during a road trip or weekend.

Price is only one part of how customers define value, however. NACS has emphasized that consumers also evaluate convenience, quality, and craveability when deciding whether a foodservice purchase is worth the money.

C-stores already have convenience built into the business model. Pairing it with craveable food at a fair price gives customers value. Bundles, merchandising, and a broad assortment help operators turn that value into a larger purchase.

Customers who walk in for coffee may need only a reminder to add breakfast, while someone choosing a roller-grill item may already be looking for a cold drink. At lunch, a clearly priced combination can make the purchase easier by giving shoppers a complete meal without another decision.

When the food, beverage, price, and trip fit together, operators can grow the basket while giving customers more value for the visit.

Part 5:

Execution Is the Revenue Multiplier

Better execution can help operators get more from existing foodservice assets.

A STRONG MENU CAN GET customers interested in c-store foodservice, but consistent execution brings them back.

Food must be available when customers want it, look appealing, and deliver the same quality every visit. Those fundamentals are of critical importance as foodservice takes on a larger role in c-store profitability. According to the NACS, foodservice accounted for 28.5 percent of in-store sales in 2025 and an even larger share of gross profit dollars.

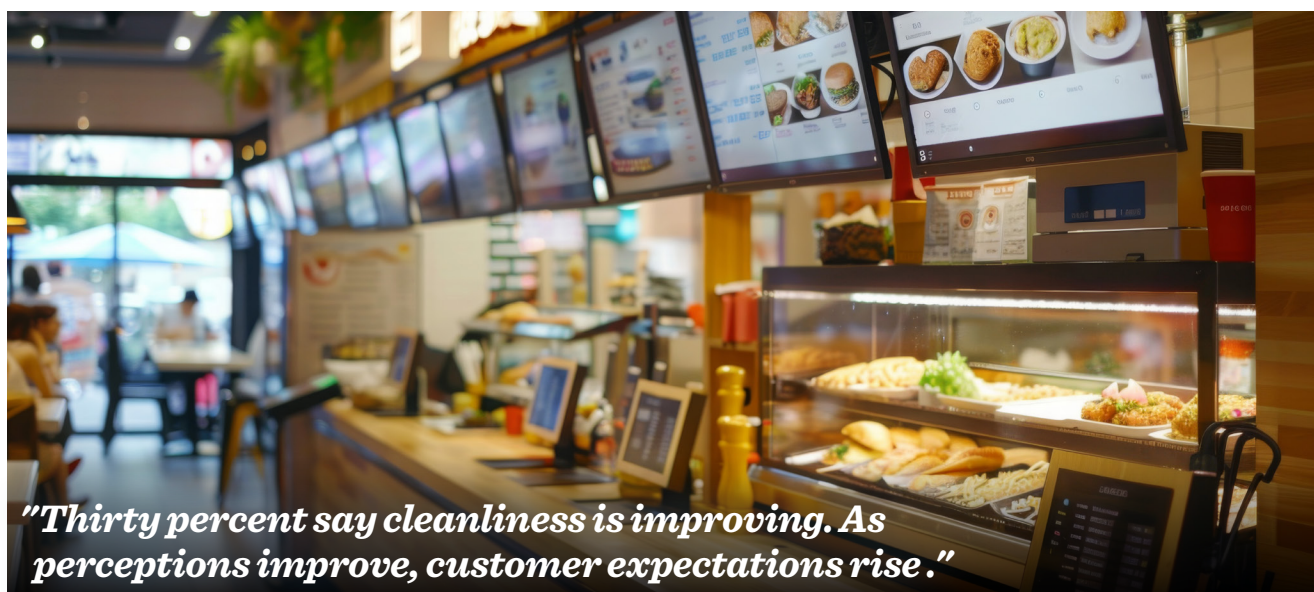
Foodservice also brings operational demands that packaged merchandise doesn't. Prepared foods have limited holding times, equipment requires cleaning and monitoring, and employees must know

when to prepare, replenish, and remove products. Operators need enough food to capture demand without producing so much that waste erodes those financial gains.

Historical sales, daypart patterns, and store-level demand can guide production and replenishment. An empty display means a missed transaction, while overproduction cuts into margins. Operators can adjust how much employees prepare throughout the day as demand changes.

Freshness and presentation matter, too. Datassential found that 33 percent of consumers believe freshness at their favorite c-store is getting better, while 35 percent say the same about taste and quality.





"Thirty percent say cleanliness is improving. As perceptions improve, customer expectations rise."

Thirty percent say cleanliness is improving. As perceptions improve, customer expectations rise.

A stocked hot case communicates freshness, abundance, and choice, while an organized roller grill makes products easy to identify. Clean equipment, visible pricing, and clear signage all build confidence in a store's foodservice program. Datassential found that 38 percent of consumers who made an unplanned purchase during their most recent c-store visit bought prepared food. Among all unintended food and beverage purchases, 22 percent said placement near the register influenced the purchase, while 16 percent cited a special display.

The roller grill shows how equipment, merchandising, and operations work together. Datassential found that 68 percent of surveyed operators offered taquitos or Tornados in 2026, up 15 percentage points from 2023. Operators also use roller grills for a growing range of flavors and formats alongside traditional hot dogs. In 2026, 7-Eleven announced plans to expand its grill and reinvent its open-air case as part of a broader investment in fresh food.

Roller grills offer multiple hot-food choices without requiring customers to place an order or employees to prepare every item on demand. They can serve customers throughout the day and put ready-to-pur-

chase hot food in plain view. Using them to their full potential is a strategic move: Operators can get more from equipment already on the counter by evaluating assortment, placement, presentation, and replenishment before investing in another cooking platform.

This strategy requires clear procedures, though. Employees need to know how to load the grill, track holding times, remove products, and replenish the assortment. Operators can also adjust the mix by daypart and location to match demand. The same principles apply to hot cases and other ready-to-purchase formats, where product availability and presentation can determine whether customers stop or keep walking.

Hot cases and grab-and-go displays can also help operators match the format to the pace of the visit. Customers can choose a ready-to-purchase item without waiting for made-to-order preparation, while employees can replenish products in batches based on demand. That approach can expand the food offer without adding an ordering step to every transaction.

These efficiencies matter because labor remains one of the biggest constraints on c-store foodservice growth. Employees need to be able to prepare and replenish food while also operating registers, stocking merchandise, cleaning, and handling other tasks.

Every added step increases complexity and labor costs, so operators should consider labor requirements when developing the menu.

Products with fewer preparation steps, familiar equipment, and simple procedures help employees deliver consistent results across shifts and locations. Formats that limit made-to-order steps can also free employees to manage several foodservice tasks at once. The goal is to make the operation easier to repeat without sacrificing the quality and consistency customers expect.

Programmable cooking and simplified controls can reduce training requirements and variation among employees. NACS reported in July 2026 that operators want equipment that simplifies operations and delivers consistent results despite staffing challenges.

Multi-unit operators also face another test: whether employees can reproduce the same food experience across locations. A product that performs well at one store can lose its value if dozens or hundreds of locations struggle to execute it. Standard preparation instructions, defined holding times, merchandising standards, and clear replenishment routines are essential so employees have a repeatable system to follow.

Food safety is another piece of the consistency puzzle. As c-stores sell more prepared food, customers hold them to the same standards they expect from

their favorite restaurants. Clean preparation areas, proper holding temperatures, and disciplined handling procedures protect customers and reinforce confidence in the food program.

Clean preparation areas, proper holding temperatures, and disciplined handling procedures protect customers and reinforce confidence in the food program.

This doesn't mean that operators need identical assortments or production levels at every store. A schedule that works at a high-volume commuter location may create waste at a lower-volume rural store, while breakfast and late-night demand can vary greatly by location. Store-level sales and waste data can help operators tailor production while maintaining consistent taste and quality standards.

The same approach can guide tests of new items. An LTO or expanded roller-grill assortment may generate interest, but sales, waste, and availability show whether demand justifies the space and inventory. Those measures help operators adjust or remove products before unsold inventory cuts into profits.

Execution affects every foodservice growth strategy because customers must be able to count on the offer. A new product won't drive repeat visits if it's frequently unavailable, just as an out-of-stock component can undermine a value bundle or an empty, poorly maintained roller grill can limit sales. The same principle applies to daypart expansion, which depends on having food available during the added hours.

Operators should focus on the foodservice program they can execute well. Matching assortment to demand, getting more from existing equipment, and giving employees clear processes can improve performance without adding unnecessary complexity.

The greatest growth opportunities are often hiding in plain sight. Use the menu and equipment already in place but keep in mind that availability, consistent quality, strong merchandising, and repeatable processes can help turn those existing assets into more sales.



Part 6:

The Foodservice Performance Scorecard

The right metrics show what's working and where revenue opportunities remain.

FOODSERVICE SALES ARE GROWING. But sales alone don't show how well a foodservice program performs.

An operator can increase sales while also producing too much waste, missing opportunities during certain dayparts, or converting too few beverage customers into food buyers. Even strong sales can hide problems, from a new menu item that fades after an impressive first week to best sellers that routinely run out during peak periods.

The right metrics show operators whether foodservice growth is making them more money.

That matters as foodservice claims a larger share of c-store sales and profits. In 2025, foodservice accounted for 28.5 percent of in-store sales but 38.9 percent of in-store gross profit dollars, according to the NACS.

Sales mix is a good place to start. Operators can track how much of total in-store revenue comes from foodservice, then break down the contribution from prepared food, dispensed beverages, and individual foodservice platforms. Tracking those numbers over time shows whether foodservice is gaining ground, and which parts of the program are driving the growth.

Individual product performance adds another layer. Unit sales and revenue can identify best sellers, but volume alone doesn't tell operators which products make the most money. Margin, waste, and the amount of display or equipment space an item requires matter, too. A high-volume product with excessive waste may contribute less profit than an

item with lower sales but stronger margins and predictable demand.

Understanding which products perform best is only part of the picture, though. Operators also need to know when customers are buying them. Datassential found clear differences in recent c-store foodservice growth by time of day. Among operators offering each daypart, 64 percent reported increased breakfast sales, and 55 percent reported lunch growth. Fewer operators reported growth during afternoon snack, dinner, and late night.

Operators can analyze their own stores the same way. Comparing foodservice sales with overall traffic by hour or daypart can reveal periods when customers are already visiting, but aren't buying food. Those gaps may point to problems with assortment, merchandising, or availability instead of traffic.

Food-and-beverage attachment can reveal more untapped revenue. NACS reported that 37.4 percent of packaged-beverage purchasers also bought prepared food during the same visit in 2024. Store-level attachment rates show operators how well merchandising, bundles, and promotions connect two of the industry's strongest categories.

Operators should look at attachment in both directions. They can measure how often foodservice transactions include a beverage and how often beverage transactions include food. Comparing those rates across dayparts, stores, and promotions can reveal combinations that build larger baskets.

Capturing those opportunities also depends on

having the right products available when customers want them. Tracking availability can reveal sales operators may be missing when popular items aren't in the rotation.

Operators can track out-of-stocks and product availability during key selling periods, especially for high-volume items. A breakfast sandwich that sells out before the morning rush ends may post strong unit sales, but leave revenue on the table. An empty roller grill during the afternoon commute creates the same problem.

Keeping shelves stocked requires a careful balance: Produce too little and operators miss sales; pro-

Tracking discarded product by SKU, store, and daypart shows where production exceeds demand.

duce too much and waste eats into margins. Tracking discarded product by SKU, store, and daypart shows where production exceeds demand.

The key is to look at availability and waste together. Low waste paired with frequent out-of-stocks may signal underproduction, not efficiency. High availability paired with excessive waste can signal overproduction. Operators need enough product available to capture demand without leaving large quantities unsold.

Consistency and compliance belong on the scorecard, too. Operators can monitor whether stores follow preparation procedures, holding times, food-safety requirements, merchandising standards, and promotional plans. Multi-unit operators can compare results across locations to spot execution gaps and determine whether stores need more training or simpler processes.

Those comparisons can also help operators spot what top-performing stores do differently. One location may sell more breakfast with the same menu, while another may run lower waste on the roller grill or attach beverages to more food purchases. Looking at those differences can uncover practices worth testing elsewhere, from production levels and merchandising to staffing patterns and product mix.

Customer behavior adds another dimension. Loyalty programs can show whether foodservice customers return, how often they visit, and what else they buy. Repeat-purchase data is especially useful when evaluating new products and LTOs, since initial sales may reflect curiosity or promotional support. Continued purchases show whether customers liked the item enough to buy it again.

Promotion data should be scrutinized as well. A discount that produces a temporary sales spike may do little for long-term performance if customers stop buying the product when the promotion ends. A promotion that wins repeat customers can keep generating revenue after the discount disappears.

Operators don't need to track every available metric, however. A useful scorecard measures the things that help them make better decisions.

For example, if breakfast sales are weak despite strong morning traffic, look at product availability, assortment, and attachment with coffee. If a new roller-grill item sells well, compare its margin, waste, and repeat purchases with the product it replaced. If a bundle lifts transactions but reduces profit per basket, operators can adjust the pricing or components.

Recent industry performance shows why operators need to look beyond topline sales. Although the industry posted another year of record in-store sales in 2025, inside transactions declined 1.6 percent on a per-store, per-month basis. Basket value increased by 24 cents but rising costs contributed to an eight-percent decline in inside transaction profitability.

Translation: Higher sales don't always equal higher profits.

A strong foodservice scorecard connects sales with the factors behind them. Operators can see what customers buy, when they buy it, how much profit those sales generate, and where they may be leaving revenue on the table.

Taken together, these metrics give operators a record of past performance and reveal where to focus next.

Part 7: The 12-Month Growth Plan

A focused approach helps operators test, measure, and scale what works.



AFTER IDENTIFYING POTENTIAL REVENUE streams, refining the menu, and improving execution, c-store operators face one final question: Where should they start?

Trying to expand breakfast, introduce new products, increase beverage purchases, and overhaul merchandising—all at the same time—makes it difficult to know which changes produce results. A focused 12-month plan gives operators a way to prioritize opportunities, measure progress, and build on what works.

Start with the biggest gap.

That may be a daypart. Datassential found that 64 percent of surveyed operators offering breakfast reported increased sales during that daypart, while 55 percent reported lunch growth. A store with strong morning traffic but weak foodservice sales could convert more coffee and commuter traffic into breakfast purchases.

Other stores may find the gap elsewhere, such as a busy afternoon with little prepared-food activity. That could signal an opportunity for snacks, while strong packaged-beverage sales paired with weak food attachment may point to opportunities for better pairings or merchandising. Frequent out-of-stocks on popular hot foods could make improving availability a higher priority than expanding the menu.

Identifying a specific problem gives operators something concrete to solve and measure. Then they can establish a baseline using the metrics tied to that problem, such as foodservice sales, transactions, daypart performance, food-and-beverage attachment, waste, or product availability.

Operators need not have a sophisticated data operation to get started. NACS notes that even independent operators can use transaction data to identify which foodservice items sell and which don't. The real value comes from using that information to make decisions about the menu and operation.

With the opportunity identified and a baseline in place, operators can then choose a manageable group of hero products to focus on.

Hero items should have a defined job within the foodservice program. A breakfast sandwich or burrito might anchor the morning offer, while pizza could serve as a recognizable meal option across several dayparts. A group of roller-grill favorites can serve customers looking for portable hot food without requiring a made-to-order transaction.

Sales are only one consideration when choosing hero products. Operators also need items that deliver margin and repeat purchases while fitting the store's labor and equipment capabilities.

Once operators choose those products, they can strengthen the fundamentals around them. Are they consistently available during peak demand? Are they easy for customers to find? Does the display look appealing? Can employees prepare and replenish them across shifts without adding unnecessary complexity?

Addressing those fundamentals can increase the value of products already on the menu. From there, operators can test ways to get more from the core offer. For instance, a breakfast hero might be paired with coffee, while roller-grill products can be tested with different assortments or merchandising. An established menu favorite can become the foundation for an LTO featuring a new flavor, sauce, or topping.

The key is to keep tests focused enough to measure the results. Many c-store operators already use this approach. Kwik Trip, for example, tested a new item in 30 stores before gradually expanding the rollout. Rutter's uses stores with different customer demographics to test new items, then broadens tests when operational complexity requires additional feedback.

LTOs can be another testing ground. A temporary offer lets operators gauge demand before committing permanent menu space or inventory. If custom-



ers respond and execution works, the product can return or earn a place in the permanent assortment. But operators need the right data to know whether a test worked and what to do next. Measure performance throughout the test, then adjust along the way using metrics that match what the test is designed to accomplish.

The metrics should match the goal of each test. For a bundle designed to increase food-and-beverage attachment, operators can track attachment and basket performance, while sales, waste, and availability provide a fuller picture of a new roller-grill item. A breakfast initiative might call for a closer look at morning performance rather than changes in total daily foodservice revenue.

Initial sales tell only part of the story. A promotion or new product can produce a short-term sales spike because customers are curious. Repeat purchases show whether customers come back after that initial trial.

By the later months of the plan, operators should have enough information to decide what deserves a wider rollout. Successful tests can expand to more locations, additional dayparts, or permanent menu placement, and products that don't perform can be modified or removed. Testing can also expose operational problems while they're



still manageable, giving operators time to address them before a larger rollout.

Some results may point to simplification. A tighter assortment may perform better, or customers may respond better to consistent availability of core favorites than to a larger menu. Operators can use those findings to invest in what produces results instead of adding complexity for its own sake.

Even modest gains can add up in a category that already generates a significant share of c-store revenue and profit. Foodservice generated 28.5 percent of in-store sales and 38.9 percent of gross profit dollars in 2025, according to NACS.

Over the course of a year, operators can establish a baseline and strengthen execution before moving into targeted testing, measurement, and expansion of the strategies that prove themselves.

The results also give operators a starting point for the following year, when one successful initiative may reveal the next opportunity. A strong breakfast program could open the door to lunch growth, while better roller-grill availability could create opportunities to increase beverage attachment. An LTO that performs well might even uncover demand for a new permanent flavor.

Each improvement gives operators more information about what customers want and what the operation can execute well. Use those lessons to choose the next opportunity, test it, and measure the results.

Over time, these decisions build on one another, which helps operators focus resources on opportunities with the greatest potential. Each year builds on the last, using what worked, what didn't, and what customers bought to guide the next stage of food-service growth. **CSD**