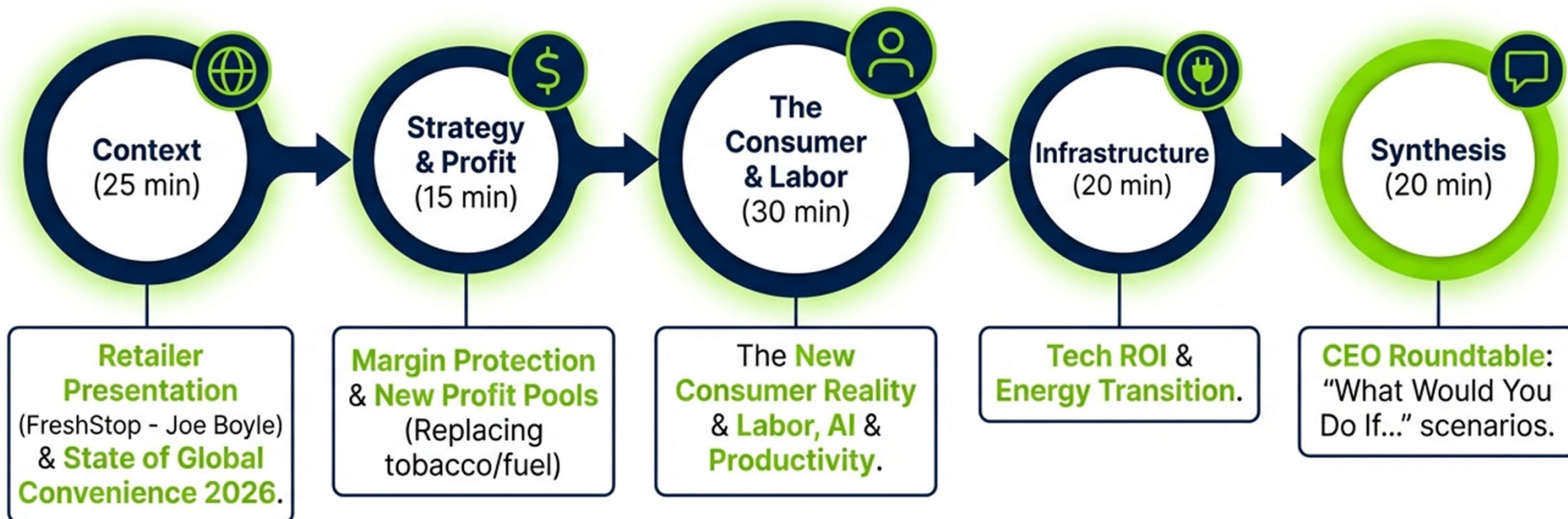


From Pressure to Profit: Navigating the Next Phase of Global Roadside Retail

March 16th, 2026

The Roadmap: 2-Hour Virtual C-Level Exchange Agenda.



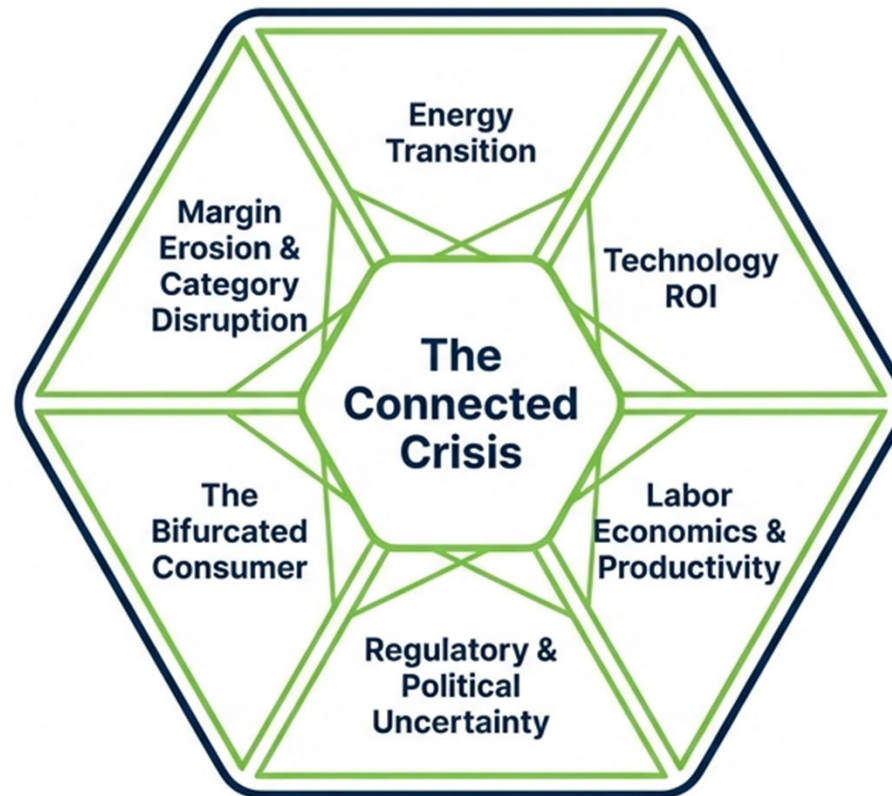


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 FreshStop Convenience Stores

Executive Strategy Editorial

Analysis of member feedback reveals six dominant global pressure zones



These six forces form the basis for the upcoming session's agenda.

The industry has entered its most structurally complex profit environment in 30 years.

FROM (The Old Reality)



Managing isolated challenges.

TO (The New Reality)

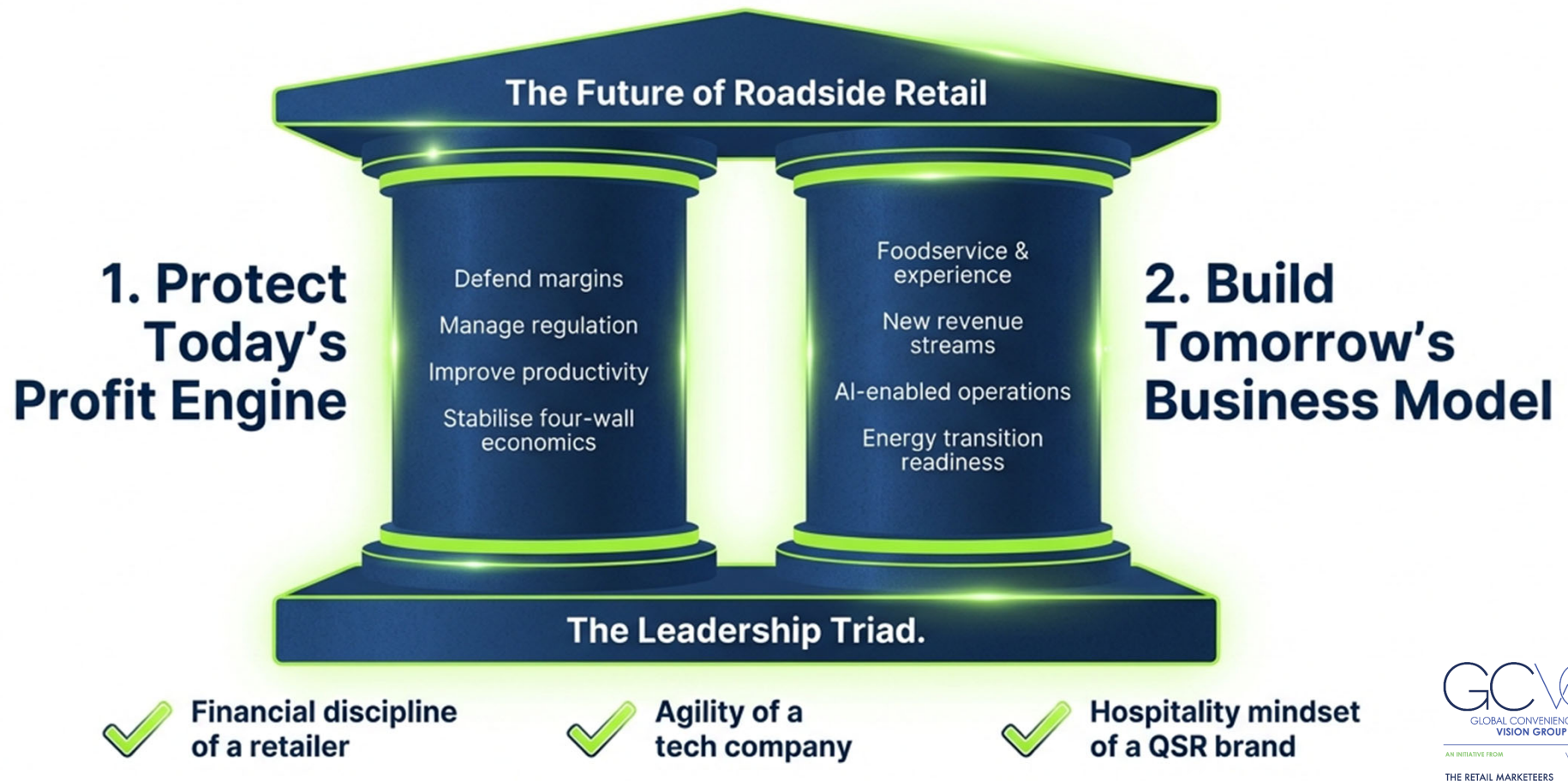


Managing simultaneous structural shifts across 6 Critical Zones:

- Core category profitability
- Consumer behavior
- Regulation/taxation
- Labor economics
- Technology cost vs. scalability
- Energy transition

The New CEO Mandate: Protect four-wall profitability while redesigning the business model for a fundamentally different future.

The Strategic Implication: The Industry Is Entering a “Dual Transformation Era”.



Cross-Market Strategic Questions: What members want to learn from peers.

Finance & CAPEX

“ How to **finance large site transformations?** **ROI frameworks** for rebuild vs divestment. ”

Labor & Operations

“ **Cross-training models** (forecourt + kitchen)? Maintaining service while **cutting cost?** ”

Consumer & Category

“ Winning **share of wallet** vs supermarkets? **Private label vs branded?** ”

Tech & Regulatory

“ **Scalable frictionless solutions?** **Lobbying for future categories** (gaming/cannabis)? ”

The Profit & Product Crisis: Replacing structurally declining profit pools in a regulatory fog

Margin Erosion (The Legacy Problem)



- How do we replace lost gross profit?
- Illicit tobacco & excise increases
- Declining beer & alcohol consumption
- Fuel margin volatility



Regulatory Uncertainty (The Fog)



- Planning is harder than operating
- Tobacco & advertising bans
- Sugar taxes, sustainability mandates

Focus Areas: Managing black market tobacco impact & Identifying next €/ \$ profit pools

The Human Equation: Serving a bifurcated consumer while facing permanent wage inflation.



The Promomaniac

- Price sensitive, trading down, discount-driven loyalty, app-based promo dependency.

Wallet Compression

The Premium Seeker



- Experience over transaction, health-driven shifts, GLP-1 impact, desire for “Third-place”.

Labor Economics (The Foundation).

“Wage inflation is permanent. Productivity must fund it.”

The Reality: Full automation is not the answer; Hybrid productivity is.

Core Metric: Four-wall ROIC per site.

The Infrastructure Challenge: Distinguishing ROI reality from 'Theatre'.

Theme A: Technology ROI

The Problem: Technology promises speed, but integration cost destroys ROI.

- Custom integration costs
- Data challenges
- Lack of scalable off-the-shelf solutions

What actually delivers ROI vs what is tech theatre?



Theme B: Energy Transition

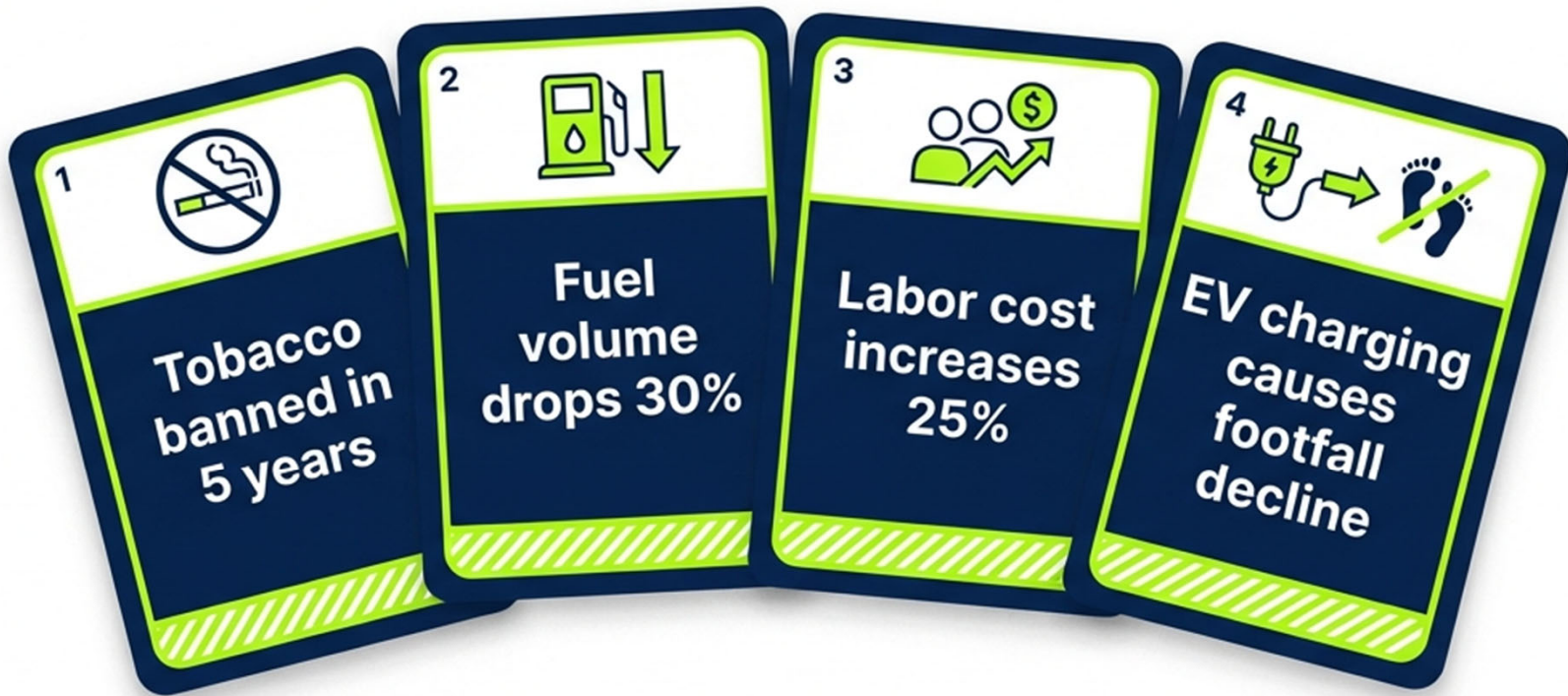
The Problem: If fuel demand declines, what replaces it?

- EV uncertainty in rural sites
- Home charging impact
- Biofuels economics

How to maintain ROI on large real estate footprints in a lower-fuel future?



The CEO Roundtable Challenge: “What Would You Do If...”



A fast-paced scenario exchange to
stress-test our strategic assumptions