

Grocery Growth Drivers in 2026

How Expanded Supply, Trip Frequency, and Shopping Missions Are Reshaping Food Retail and Creating Multiple Paths to Growth

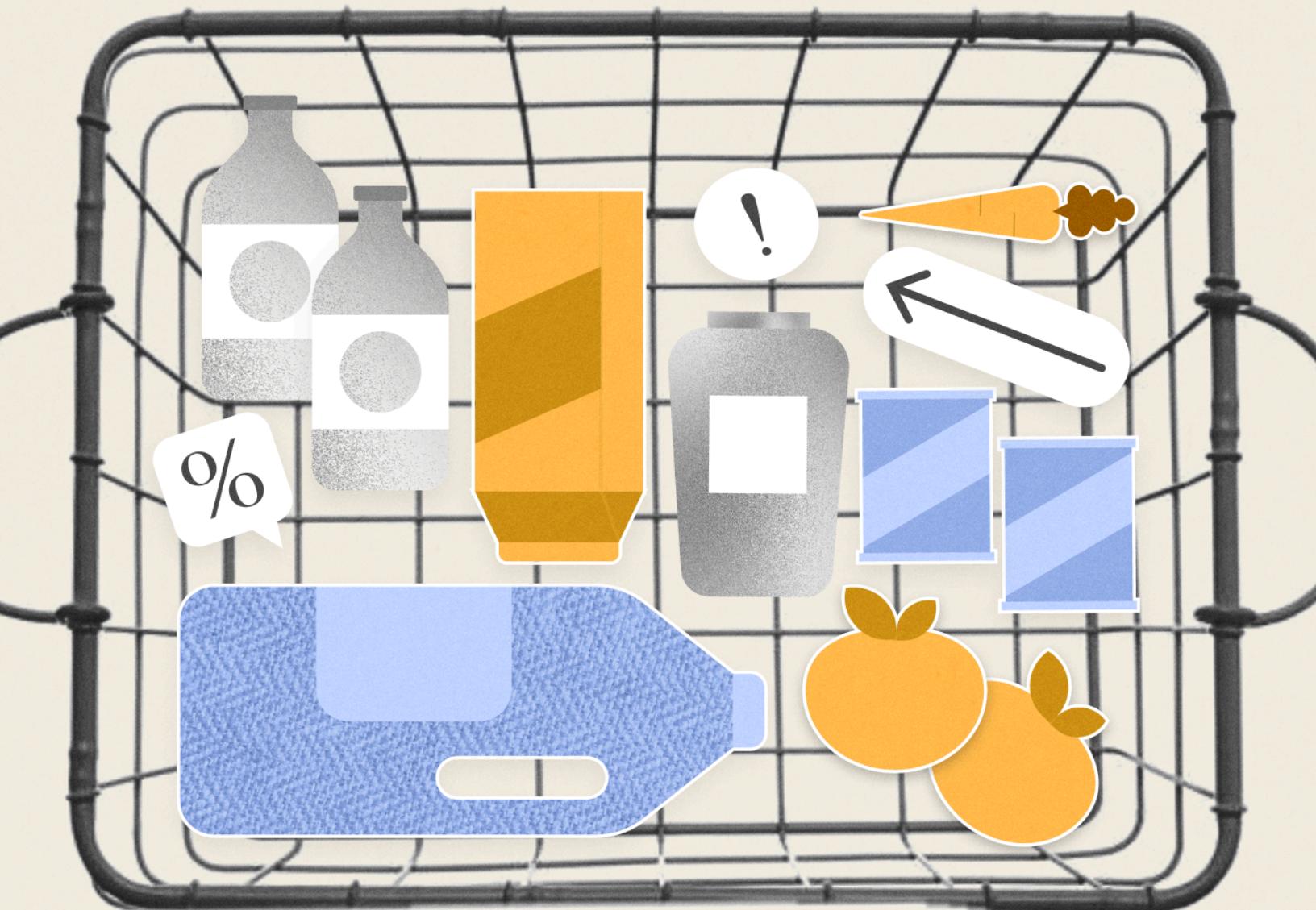


Table of Contents

Key Takeaways	2
What is Driving Grocery Growth in 2026?	3
More Trips, More Formats, and a Shift Toward Mission-Driven Shopping	3
Scale Captures Demand – But Fragmented Trips Leave Room to Grow	4
The Core Drivers of Grocery Growth in 2026	4
1. Expanded Grocery Supply Is Fueling Growth While Traditional Grocery Stores Hold Their Lead	4
Expanded Grocery Access Is Increasing Overall Category Engagement	4
Traditional Grocery Stores Maintain a Stable Share of Visits Despite Growing Competition	5
Mass Merchants Face Share Pressure as One-Stop Competition Expands	6
2. Low and Medium-Income Households Driving Larger Visit Gains	6
Grocery Growth Is Shifting Toward Lower- and Middle-Income Trade Areas	6
Higher Food Costs Likely Driving More Frequent, Budget-Conscious Trips	7
Necessity-Driven Shopping Is Powering Grocery Visit Growth	7
3. Rise in Short Grocery Trips Driving Offline Grocery Gains	7
More Frequent, Shorter Grocery Trips	7
Omnichannel Grocery Shopping Fueling Short Trips to Physical Stores	8
Grocery Shoppers Are Splitting Trips Across Multiple Retailers	9
Different Trip Types, One Outcome: Continued Store Traffic Growth	9
4. Consolidation as a Growth Driver	9
Large Chains Continue to Pull Ahead in Visit Share	9
Scale Enables Broader Assortment, Stronger Value, and Better Execution	10
5. Competition for "Share of List" Growing Grocery Visit Pie	11
Both Long and Short Trips Are Driving Grocery Traffic Growth	11
Large and Small Chains Win by Competing for Different Shopping Missions	12
What These Trends Mean for Grocery Growth in 2026	12

Key Takeaways

1. **Expanded grocery supply is increasing overall category engagement.** New locations and deeper food assortments across formats are bringing shoppers into the category more often, rather than fragmenting demand.
2. **Grocery visit growth is being driven by low- and middle-income households.** Elevated food costs are leading to more frequent, budget-conscious trips, reinforcing grocery's role as a non-discretionary category.
3. **Short, frequent trips are a major driver of brick-and-mortar traffic growth.** Fill-in shopping, deal-seeking, and omnichannel behaviors are pushing visit frequency higher, even as trip duration declines.
4. **Scale is accelerating consolidation among large grocery chains.** Larger retailers are using their size to invest in value, assortment, private label, and execution, allowing them to capture longer and more engaged shopping trips.
5. **Both large and small grocers have viable paths to growth.** Large chains are winning by competing for the full grocery list, while smaller banners can grow by specializing, owning specific missions, or offering compelling value that earns them a place in shoppers' routines.

What is Driving Grocery Growth in 2026?

While much of the retail conversation going into 2026 focused on discretionary spending pressure, digital substitution, and higher-income consumers as the primary drivers of growth, grocery foot traffic tells a different story.

More Trips, More Formats, and a Shift Toward Mission-Driven Shopping

Rather than being diluted by new formats or eroded by e-commerce, brick-and-mortar grocery engagement is expanding. Visits are rising even as grocery supply spreads across wholesale clubs, discount and dollar stores, and mass

merchants. At the same time, growth is being powered not by affluent trade areas, but by low- and middle-income households navigating higher food costs through more frequent, targeted trips. Shoppers are showing up more often and increasingly splitting their trips across retailers based on value, availability, and mission – pushing grocers to compete for portions of the grocery list instead of the full weekly basket.

Scale Captures Demand – But Fragmented Trips Leave Room to Grow

The data also suggests that the largest grocery chains are capturing a disproportionate share of rising grocery demand – but the multi-trip nature of grocery shopping in 2026 means that smaller banners can still drive traffic growth. By strengthening their value proposition, specializing in specific products, or owning specific shopping missions, these smaller chains can complement, rather than compete with, larger one-stop destinations.

The Core Drivers of Grocery Growth in 2026

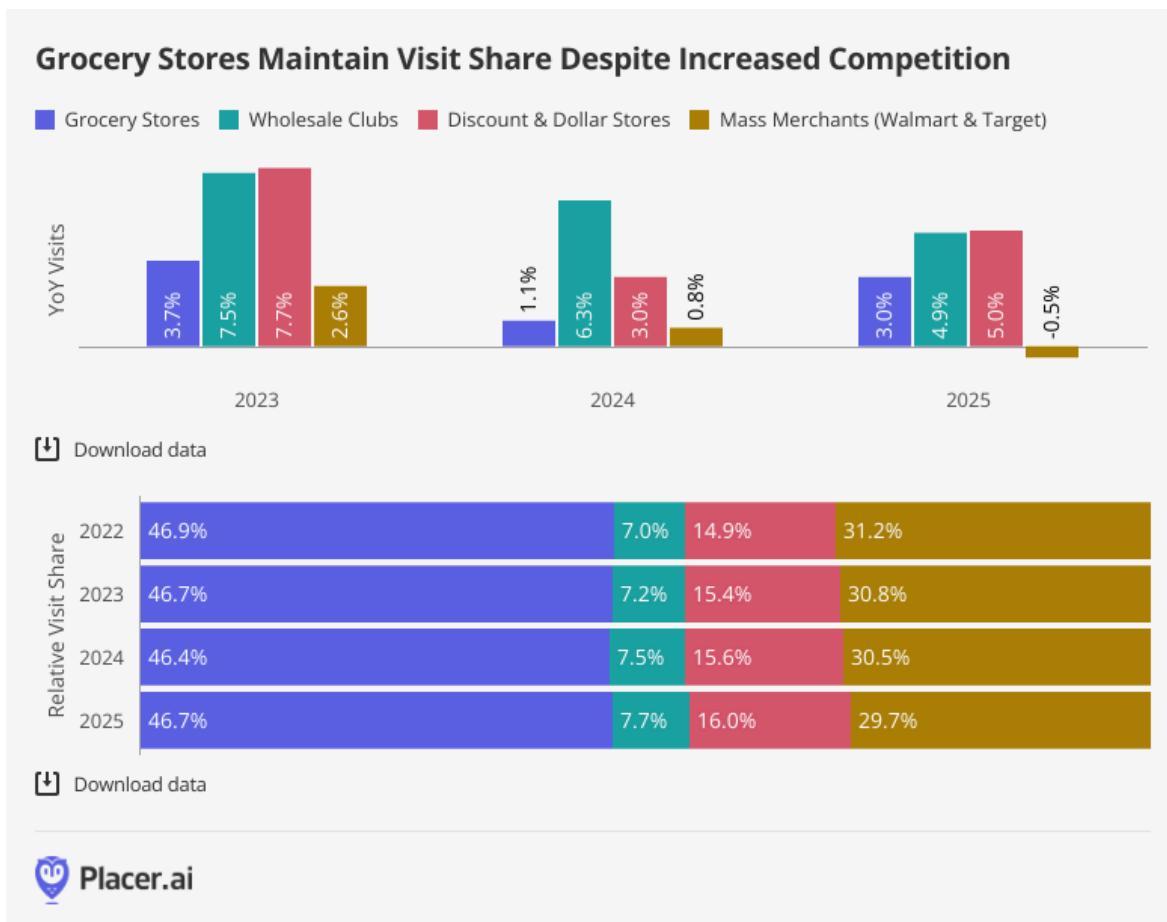
Ultimately, AI-based location analytics point to a clear set of grocery growth drivers in 2026: expanded supply that increases overall engagement, more frequent and mission-driven trips, and continued traffic concentration among large chains alongside new opportunities for smaller banners.

1. Expanded Grocery Supply Is Fueling Growth While Traditional Grocery Stores Hold Their Lead

Expanded Grocery Access Is Increasing Overall Category Engagement

One driver of grocery growth in recent years is simply the expansion of grocery supply across multiple retail formats. Wholesale clubs are constantly opening new locations and discount and dollar stores are investing more heavily in their food selection, giving consumers a wider choice of where to shop for groceries. And rather than fragmenting demand, this broader availability appears to have increased overall

grocery engagement – benefiting both dedicated grocery stores and grocery-adjacent channels.



Traditional Grocery Stores Maintain a Stable Share of Visits Despite Growing Competition

Grocery stores continue to capture nearly half of all visits across grocery stores, wholesale clubs, discount and dollar stores, and mass merchants. That share has remained remarkably stable thanks to consistent year-over-year traffic growth – so even as grocery supply increases across categories, dedicated grocery stores remain the primary destination for food shopping.

Mass Merchants Face Share Pressure as One-Stop Competition Expands

Meanwhile, mass merchants have seen a decline in relative visit share as expanding grocery assortments at discount and dollar stores and the growing store fleets of wholesale clubs give consumers more alternatives for one-stop shopping.

2. Low and Medium-Income Households Driving Larger Visit Gains

Grocery Growth Is Shifting Toward Lower- and Middle-Income Trade Areas

While much of the broader retail conversation heading into 2026 centers on higher-income consumers carrying growth, the trend looks different in the grocery space. Recent visit trends show that grocery growth has increasingly shifted toward lower- and middle-income trade areas, underscoring the distinct dynamics of non-discretionary retail.

Grocery Visit Growth Shifted From Higher- to Lower-Income Trade Areas

Year-over-Year Change in Grocery Visits Across Trade Areas Grouped by Median Household Income



Higher Food Costs Likely Driving More Frequent, Budget-Conscious Trips

For lower- and middle-income shoppers, elevated food costs appear to be translating into more frequent grocery trips as consumers manage budgets through smaller baskets, deal-seeking, and shopping across retailers. In contrast, higher-income households – often cited as a key growth engine for discretionary retail – are contributing less to grocery visit growth, likely reflecting more stable shopping patterns or a greater ability to consolidate trips or shift spend online.

Necessity-Driven Shopping Is Powering Grocery Visit Growth

This means that, in 2026, grocery growth is not being propped up by high-income consumers. Instead, it is being fueled by necessity-driven shopping behavior in lower- and middle-income communities – reinforcing grocery's role as an essential category and suggesting that similar dynamics may be at play across other non-discretionary retail segments.

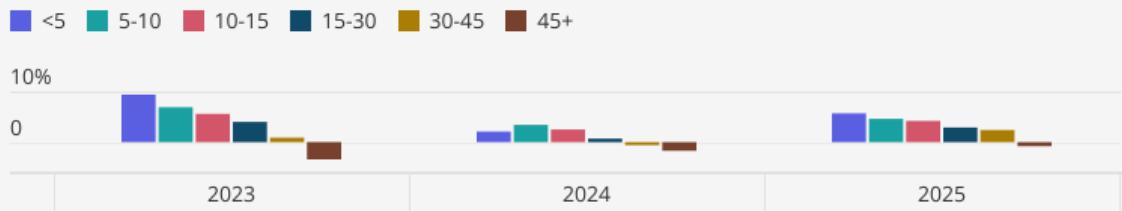
3. Rise in Short Grocery Trips Driving Offline Grocery Gains

More Frequent, Shorter Grocery Trips

Another factor driving grocery growth is the rise in short grocery visits in recent years. Between 2022 and 2025, the biggest year-over-year visit gains in the grocery space went to visits under 30 minutes, with sub-15 minute visits seeing particularly big boosts. As of 2025, visits under 15 minutes made up over 40% of grocery visits nationwide – up from 37.9% of visits in 2022.

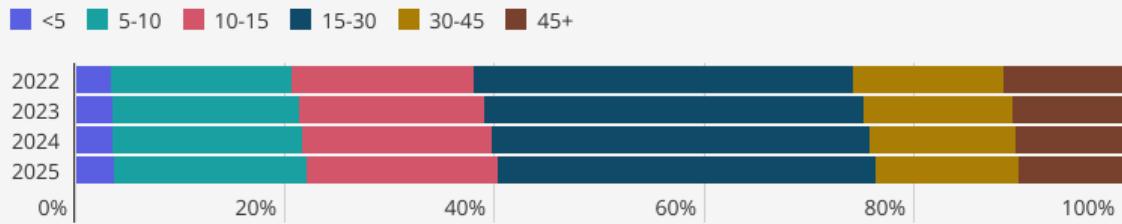
Shorter Grocery Visits Driving Majority of Grocery Gains in Recent Years

Year-over-Year Change in Visits by Visit Length (in Minutes)



[Download data](#)

Share of Visits by Duration (Minutes)



[Download data](#)



Omnichannel Grocery Shopping Fueling Short Trips to Physical Stores

This shift toward shorter visits – especially those under 15 minutes – is driven in part by the continued expansion of omnichannel grocery shopping, as many consumers complete larger stock-up orders online and rely on in-store trips for order collection or quick, fill-in needs. At the same time, the rise in short visits paired with consistent YoY growth in grocery traffic points to additional, behavior-driven forces at play – consumers' growing willingness to shop around at different grocery stores in search of the best deal or just-right product.

Grocery Shoppers Are Splitting Trips Across Multiple Retailers

Value-conscious shoppers – particularly consumers from low- and middle-income households, which have driven much of recent grocery growth – seem to be increasingly shopping across multiple retailers to secure the best prices. This behavior often involves making targeted trips to different stores in search of the strongest deals, a pattern that is contributing to the rise in shorter, more frequent grocery visits. At the same time, other grocery shoppers are making quick trips to pick up a single ingredient or specialty item – perhaps reflecting the increasingly [sophisticated home cooks](#) and social media-driven [ingredient crazes](#). In both these cases, speed is secondary to getting the best value or the right product.

Different Trip Types, One Outcome: Continued Store Traffic Growth

So while some shorter visits reflect a growing emphasis on efficiency – as shoppers use in-store trips to complement primarily online grocery shopping – others appear driven by a preference for value or product selection over speed. Despite their differences, all of these behaviors have one thing in common – they're all contributing to continued growth in brick-and-mortar grocery visits. Grocers who invest in providing efficient in-store experiences are particularly well-positioned to benefit from these trends.

4. Consolidation as a Growth Driver

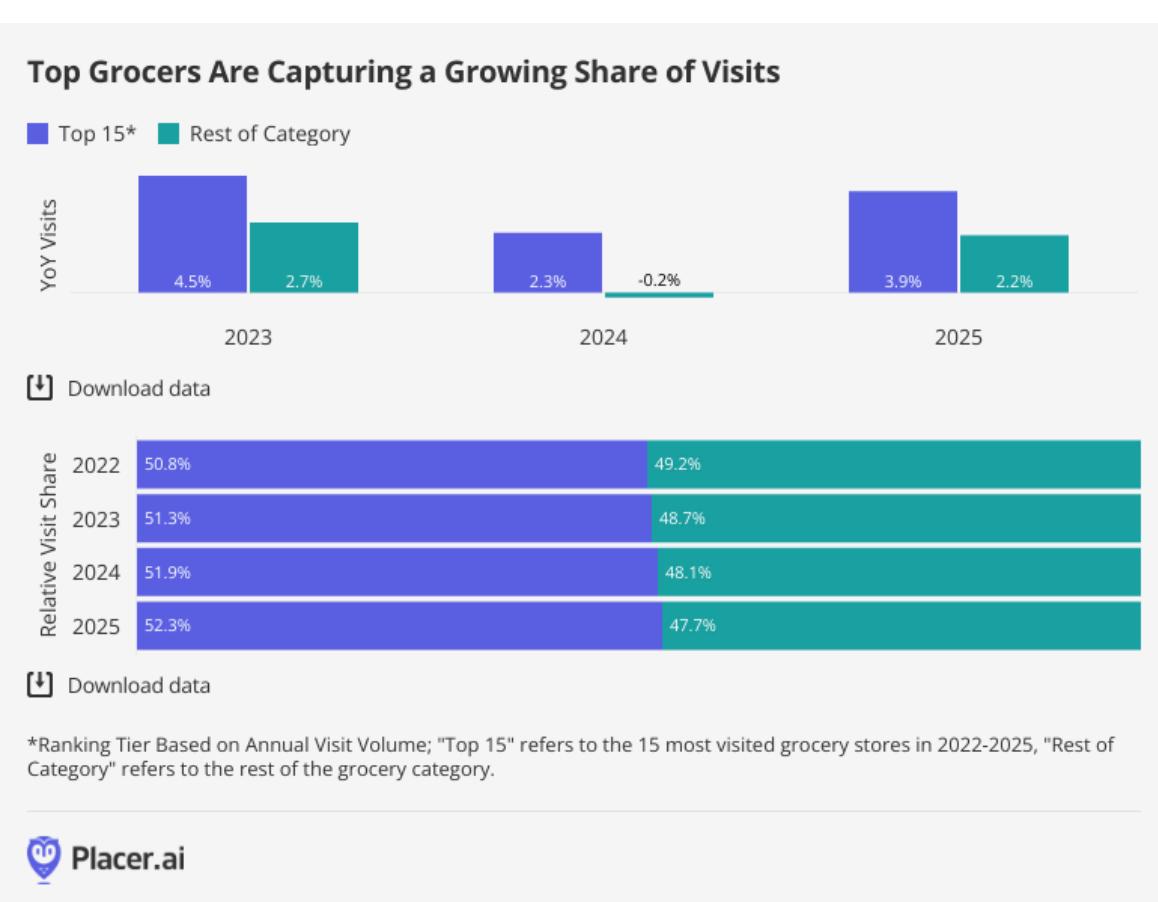
Large Chains Continue to Pull Ahead in Visit Share

As early as 2022, the top 15 most-visited grocery chains already accounted for roughly half of all grocery visits nationwide. And by outpacing the industry average in terms of visit growth, these chains have continued to capture a growing share of grocery foot traffic.

Scale Enables Broader Assortment, Stronger Value, and Better Execution

This widening gap suggests that scale is increasingly enabling grocers to reinvest in the factors that attract and retain shoppers. Larger chains are better positioned to invest in broader and more differentiated product selection, stronger private-label programs that deliver quality at accessible price points, competitive pricing, and operational excellence across stores and omnichannel touchpoints. These capabilities allow top chains to serve a wide range of shopping missions – from quick, convenience-driven trips to more intentional visits in search of the right product or ingredient.

Consolidation at the top of the grocery category is reinforcing a virtuous cycle: scale enables better value, selection, and experience, which in turn draws more shoppers into stores and supports continued grocery traffic growth.



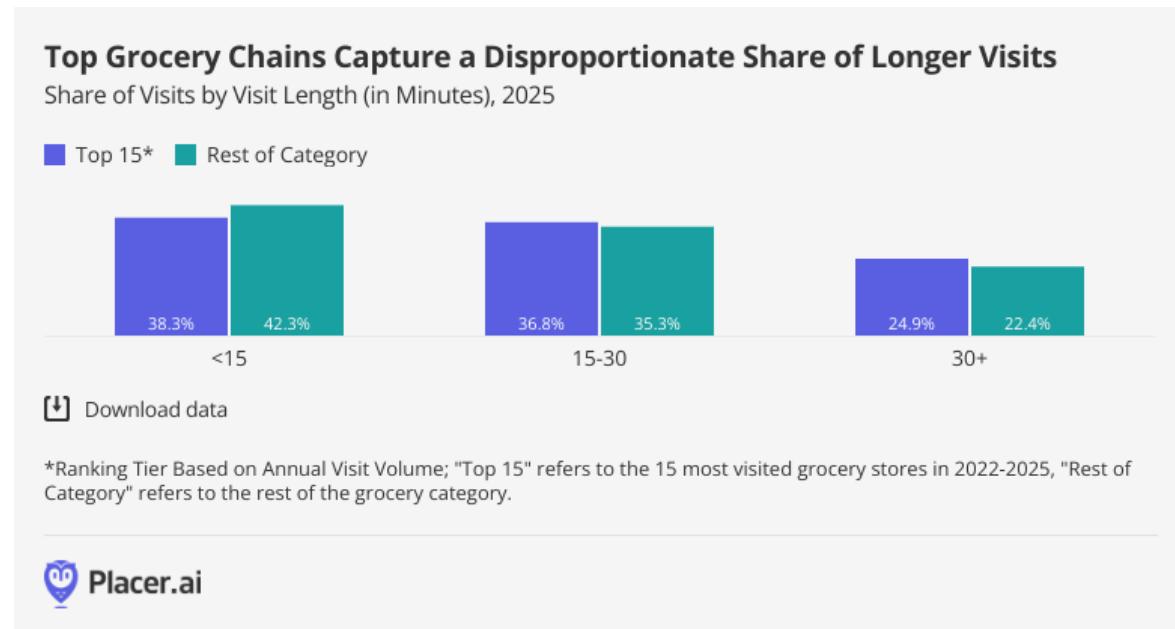
5. Competition for "Share of List" Growing Grocery Visit Pie

Both Long and Short Trips Are Driving Grocery Traffic Growth

In 2025, the top 15 most-visited grocery chains accounted for a disproportionate share of visits lasting 15 minutes or more, while smaller grocers captured a larger share of the shortest trips. As shown above, larger grocery chains, which tend to attract longer visits, grew faster than the industry overall – but short visits, which skew more heavily toward smaller chains, accounted for a greater share of total traffic growth. Together, these patterns show that both long, destination trips and short, targeted visits are driving grocery traffic growth and creating viable paths forward for retailers of all sizes.

Large and Small Chains Win by Competing for Different Shopping Missions

Larger chains are more likely to serve as destinations for fuller shopping missions, competing for the entire grocery list – or a significant share of it. But smaller banners can grow too by competing for more short visits. By specializing in a specific product category, owning a clearly defined shopping mission, or delivering a compelling value proposition, smaller grocers can earn a place in shoppers' routines and become a deliberate stop within a broader grocery journey.



What These Trends Mean for Grocery Growth in 2026

As grocery moves deeper into 2026, growth is being driven by the cumulative effect of how consumers are navigating food shopping today. Expanded supply has increased overall engagement, higher food costs are driving more frequent and targeted trips, and shoppers are increasingly willing to split their grocery list across retailers based on value, availability, and mission.

Looking ahead, this suggests that grocery growth will remain resilient, but unevenly distributed. Retailers that clearly understand which trips they are best positioned to win – and invest accordingly – will be best placed to capture that growth. Large chains are likely to continue benefiting from scale, consolidation, and their ability to serve full shopping missions, while smaller banners can grow by earning a defined role within shoppers' broader grocery journeys. In 2026, success in grocery will be less about winning every trip and more about consistently winning the right ones.