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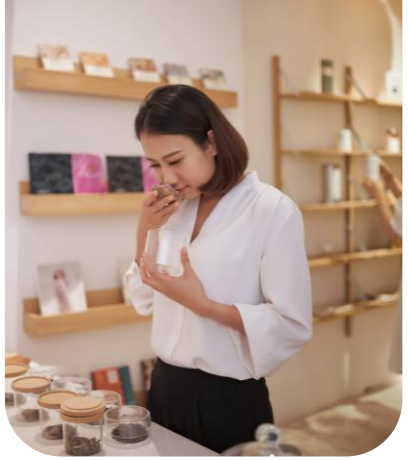
Retail Results: September

A cross-industry review of how retail trends have evolved









Release date: October 28, 2026

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September key takeaways

Summarizing the trends of September 2026.

Macro Factors

Consumers continue to spend, but with greater precision and purpose. Financial pressures remain elevated, with consumer sentiment reaching new lows and concerns about food inflation, fuel costs, and household budgets persisting. Rather than disengaging from retail, shoppers are becoming more selective, increasingly delaying purchases until a clear need, compelling value proposition, or major promotional event emerges.

Deliberate Spending Behaviors

The consumer hasn't stopped spending. They've become more willing to wait. September reinforced a growing "need now, buy now" mentality, with shoppers purchasing closer to the moment of need rather than responding to promotional calendars. Demand remained strongest in categories tied to clear utility, enjoyment, or personal relevance, while discretionary purchases faced greater scrutiny. Toys, gaming, collectibles, and cultural passion points continued to outperform.

Back-to-school Tracking

Back-to-school demand persisted later into the season as shoppers purchased when needs arose. A later Labor Day and delayed school starts in some areas of the country helped sustain spending into September, particularly in office supplies and household essentials. While early promotional events generated engagement, they did little to meaningfully pull demand forward, reinforcing that today's consumer shops according to personal timing rather than the retail calendar.

Looking Ahead

Holiday demand remains available, but consumers are becoming increasingly selective about where dollars go. October promotional events helped kick off holiday shopping, but value alone may not be enough to drive purchase decisions. Retailers that combine affordability with discovery, relevance, convenience, and meaningful consumer connections will be best positioned to capture spending through year-end.

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Table of Contents

01 **Macro Trends**
Slides 4-12

02 **September Trends**
Slides 13-17

03 **Back-to-school Tracking**
Slides 18-31

04 **Looking Ahead**
Slides 32-39

05 **Gen Merch Category Results**
Slides 40-44

06 **Appendix**
Slides 45-47



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Macro Trends

A look at macroeconomic stories and shifts that have impacted how consumers spend across retail.

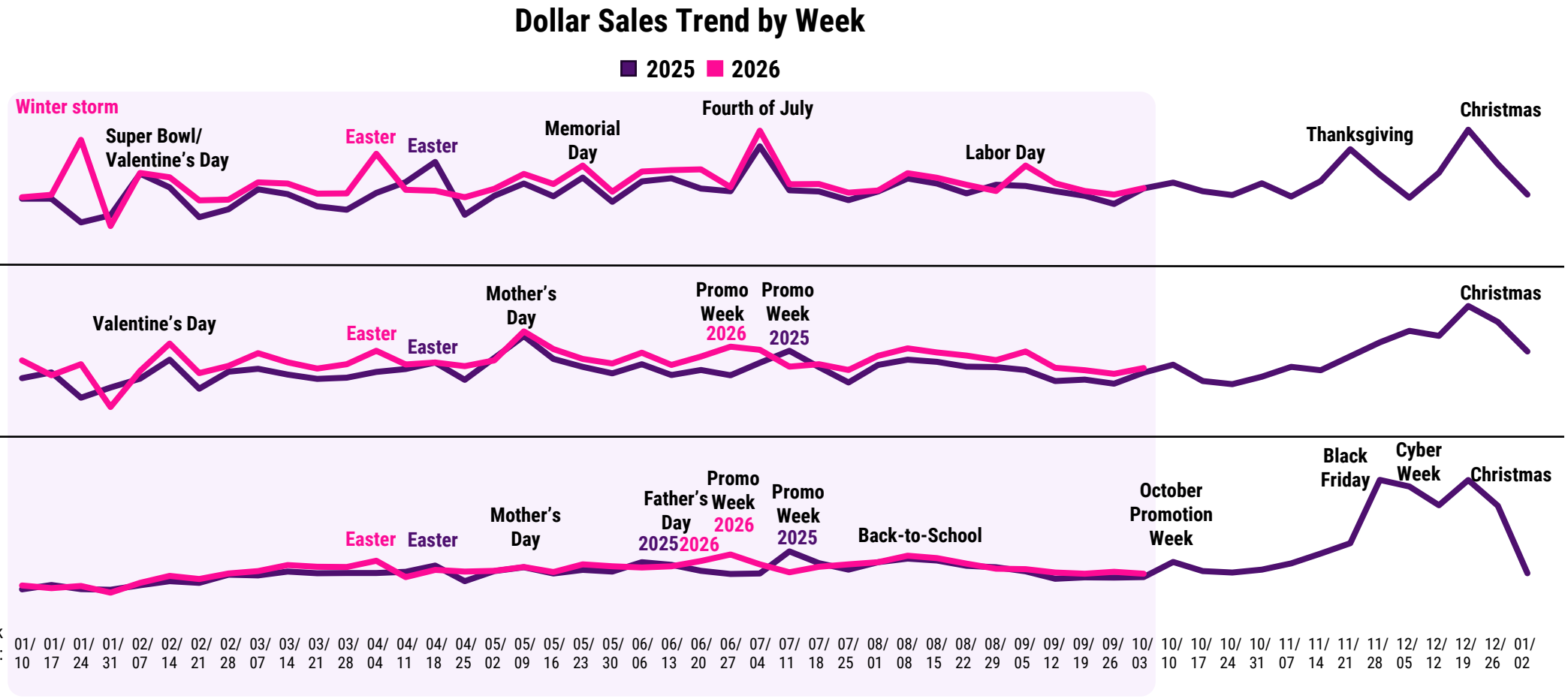




1

Dollars remain elevated across retail segments

YoY % Change	$	U
Retail Food & Beverage[1]	+2.2%	-0.1%
Nonedible CPG[1]	+2.9%	-1.4%
General Merchandise[2]	+2.6%	-1.1%

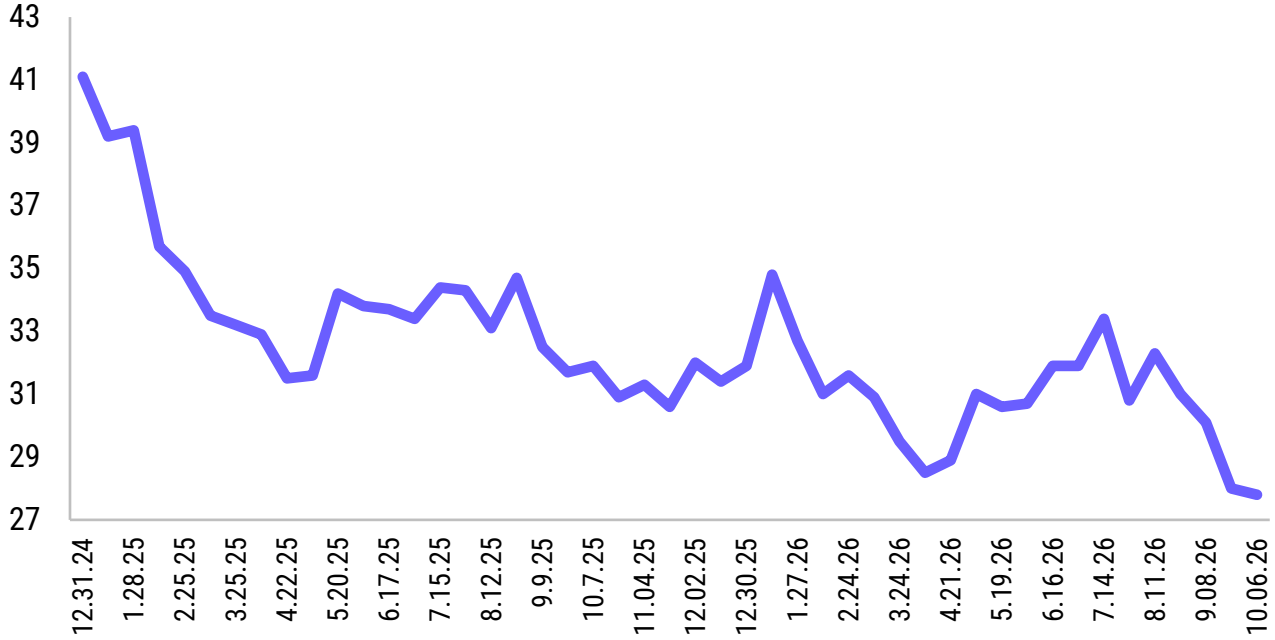


Axes on charts are not related; week-end dates based on 2026.

Sources: [1]Circana, Total Market View MULO+ Convenience and Perimeter (F&B/nonedible CPG — excluding tobacco) — week ends on a Sunday; [2]Circana, Point-of-Sale First-Read Data/Limited Release (general merchandise)

Financial pressures are driving consumer sentiment to record lows

CivicScience Consumer Sentiment Index – Biweekly Percentages

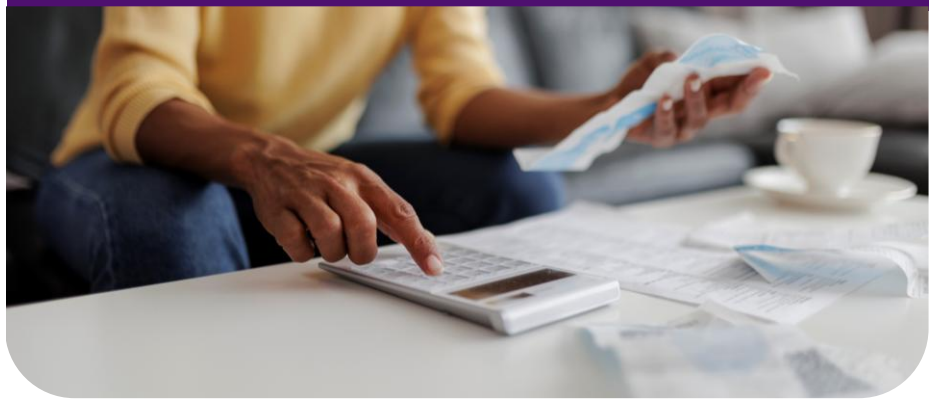


Source: CivicScience
The Penta-CivicScience timent Index (ESI) is a 'living' index that measures U.S. adults' expectations for the economy going forward, as well as their feelings about current conditions for major purchases.

40% | Describe current financial situation as worse off than year ago

78% | Are very or moderately concerned about gas prices

95% | Are somewhat or extremely concerned about food cost inflation



Source: Circana Shopper Survey, June 2026
Q: How would you describe your current financial situation vs. a year ago? N= 1002
Q: Next, we're interested in your impressions about gas/fuel prices. How concerned are you currently about gas prices? N= 1002
Q: Thinking about your own household, how concerned are you right now about food cost inflation? N=1002

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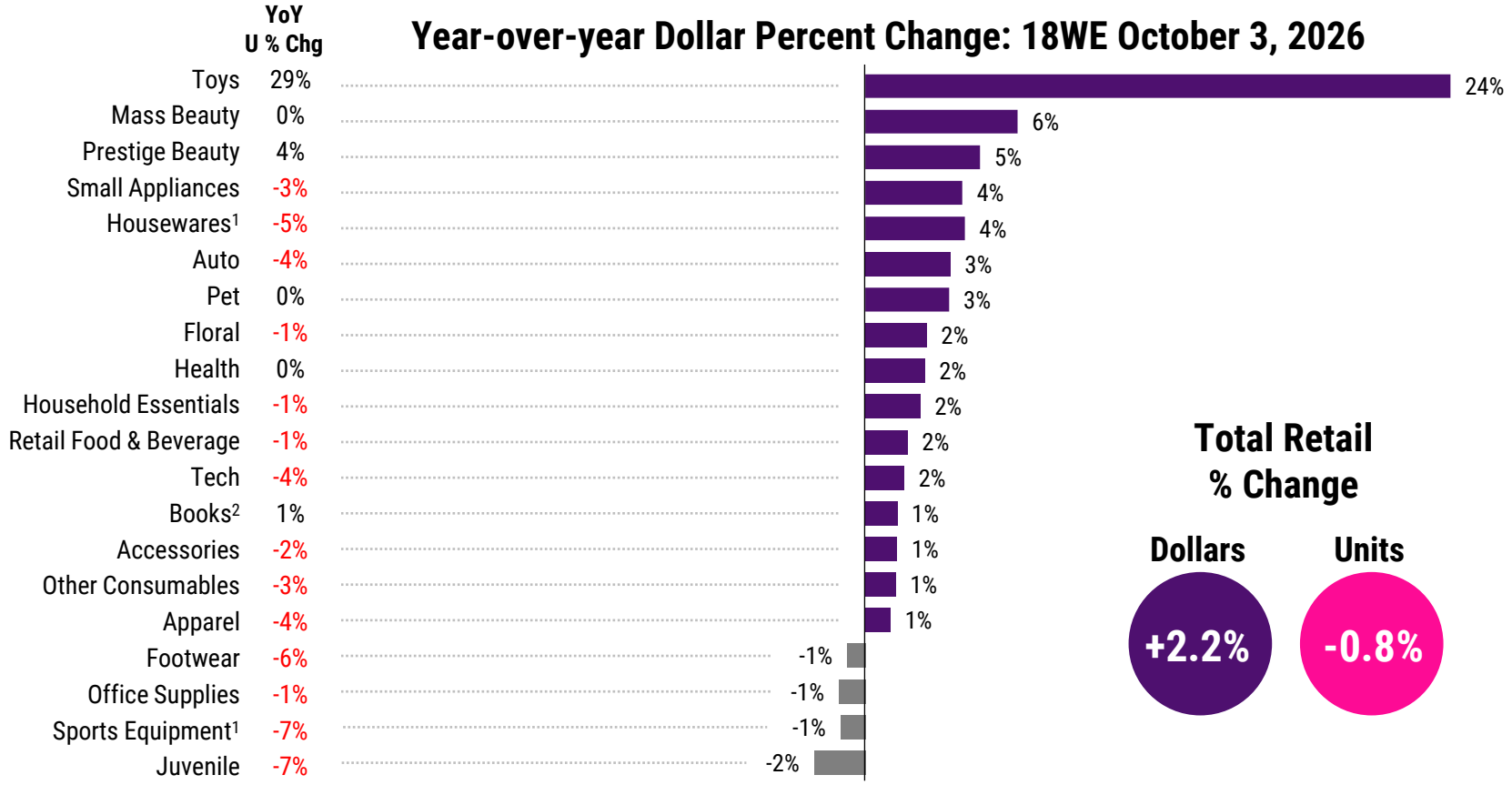
Total retail performance by industry

In the 4ME Sep'26, demand remained relatively soft across retail as consumers prioritize spend amid macro headwinds. Toys and prestige beauty remain outliers with strong growth across dollars and units.



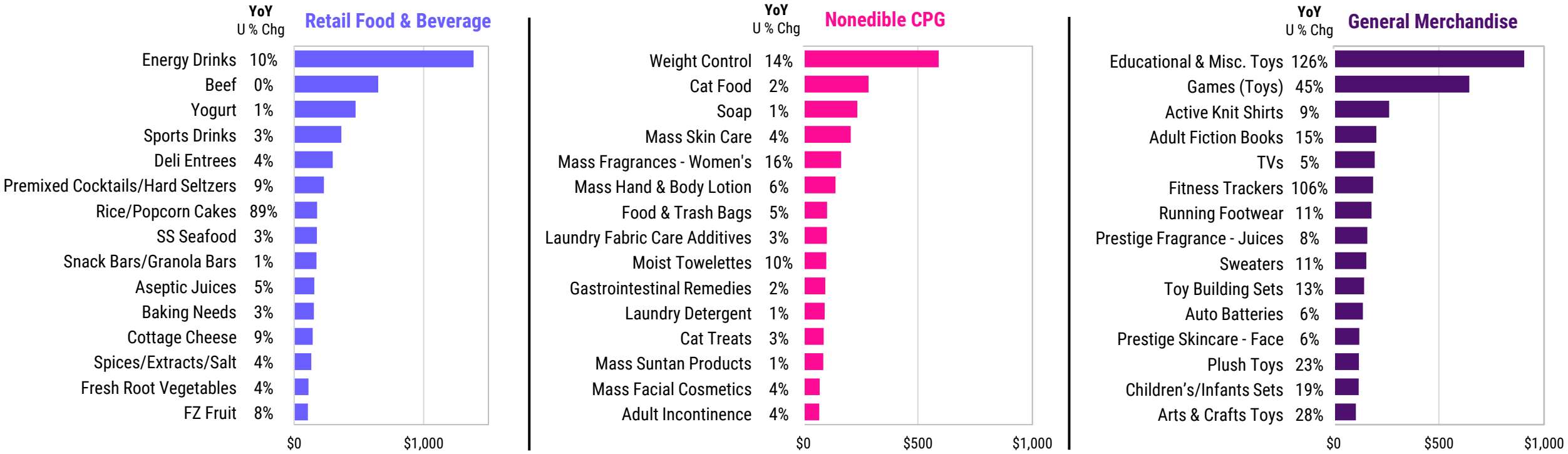


Source: Circana, Retail Tracking Service (general merchandise); Circana, Total Market View MULO+ Convenience and Perimeter (F&B/nonedible CPG-excluding tobacco) – week ends on a Sunday; [1]Circana, Retail Early Indicator (housewares and sports equipment, REI data used for these industries due to upgrade timing); [2]Books dollars represent MSRP $ sales

Retail's top growth categories tell a story

Top growth categories paint a picture of where the consumer is spending during a challenging economic period. These categories emphasize the stories of prioritization and newness that are helping shape 2026.

Top 15 Growth Categories by Absolute Dollar Change ($M); 18 Weeks Ending October 3, 2026*, vs. same weeks prior year



Source: Circana, Retail Tracking Service (general merchandise, excl. housewares and sports eq. due to upgrade timing); Circana, Total Market View MULO+ with Conv, (nonedible CPG- excluding tobacco, standard hierarchy); Circana, Integrated Fresh (Retail F&B and perimeter) – week ends on a Sunday, 18WE 10/04/2025 vs. Prior Year
*Top growth based on absolute dollar change vs. last year **and positive unit growth** vs. last year; *18WE to account for the shifted promotion week from July last year to June this year*

The consumer hasn't stopped spending; they've become more willing to wait

40%

Buying closer to the moment of need

40% of consumers say they **wait until they actually need something**, then look for the best price – regardless of promotional timing.[1]

38%

Delaying discretionary purchases

In apparel, 38% of consumers buying for a specific need made the **purchase within a week or less**.[2] Beyond fashion, smart phone replacement cycles have stretched beyond 40 months in 2026, as many consumers choose to delay upgrades.

25%

Waiting for a deal

25% shared they **wait for bigger sale events** (e.g., Black Friday, seasonal clearance).[1] Another 18% shared **buy when I see a promo**, even at a modest discount, because it feels like a good deal.[1]

How can retail engage?





Win the moment of need

Align promotions to purchase moments





Create urgency beyond discounts

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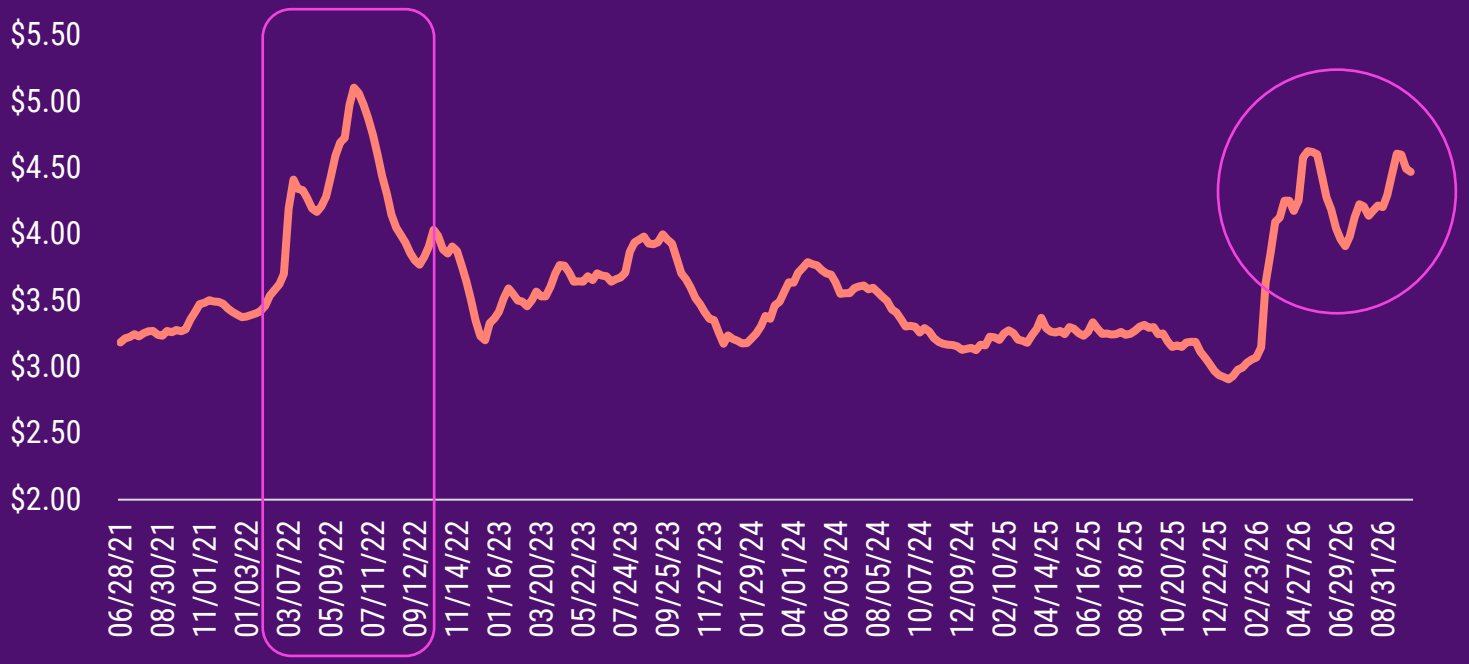
Source: Circana, Omnibus Consumer Survey, September 2026; [1]Q: Which of the following best describes your approach to retailer sales and promotions? Base: 1,002; [2]Q: Think about a recent clothing purchase you made for a specific upcoming occasion or activity, for example a vacation, an event, a season change. How far in advance of actually needing the item did you buy it? Base: Purchased apparel/clothing, 921

Gas prices remain elevated amid global supply uncertainty

As of October 12, the national average gas price rose to $4.47 per gallon, >$1 higher than early February.

Weekly U.S. All Grades All Formulations Retail Gasoline Prices (Dollars per Gallon)



U.S. gas prices surged after Russia's February 2022 invasion of Ukraine, peaking in June.



Source: US Energy Information Administration

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What could El Niño mean for retail?

El Niño is expected to reshape retail demand through changes in seasonality, regional weather patterns, and food supply dynamics. Success will depend less on forecasting the weather and more on anticipating how consumers adapt their purchasing behaviors in response.



What Could El Niño Mean for Retail?

Consumer Preparedness Fuels Rapid Demand Shifts

Weather events from earlier this year show that disruptions trigger stock-up behavior, **boosting demand for essentials, household goods, safety products, and preparedness items**.

Food Inflation & Supply Chain Volatility Could Intensify

El Niño may disrupt agricultural output and commodity supply, **potentially increasing inflationary pressure, margin risk, and consumer demand for value**.

Shifting Seasonality Raises Inventory Risk

Warmer-than-normal winter conditions associated with El Niño could weaken cold-weather demand, **raising markdown risk and reinforcing the need for agile inventory planning**.

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Read more >

AI is known, but not yet habitual

True daily integration into personal life is still limited, but adoption continues to grow. Less than 10% of consumers reported actively avoid using it all together.

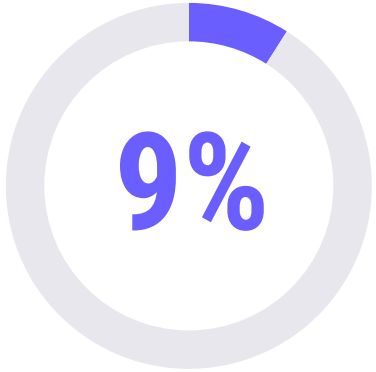
AI is seen as a utility, not yet a routine.

Use AI daily

+4pts
Vs. May



I have found AI to be very helpful and find **myself using it daily**



I find AI to be a negative impact on my life and **actively avoid using it**

Actively avoid using AI

-1pts
Vs. May

Check Out Circana's new webinar series

AI, Measured

Episode 1 – Watch the recording
The Shift and Strategies that Win

Episode 2 – Watch the recording
The Math of AI: Winning as a Brand

Coming Soon

Episode 3 – Coming November 4
Where Consumers Draw the Line on AI

Coming Soon

Episode 4 – Coming December 8
Meet the AI Consumer

Source: Circana, Omnibus September 2026
Q. How would you assess your view of generative AI chatbots and how it has changed in the last year? Base: 1,002

September Trends and What We're Watching

This section highlights unique trends across retail that have influenced consumer spending during the month and beyond.





2

Retailers celebrate Hispanic Heritage Month

Hispanic consumers account for 17% of general merchandise dollars, up 0.2pts versus last year. As this consumer's contribution to retail continues to grow, Hispanic Heritage Month serves as a reminder of the need for authentic, culturally relevant engagement that extends beyond a single moment on the calendar.



Ulta Beauty highlighted Hispanic- and Latino-owned, founded, and led brands across makeup, hair care, and fragrance through its Latin Heritage Month Collection.



ShopRite celebrated Hispanic Heritage Month featuring authentic Latin flavors, traditional recipes, and community events.



Target offered a special collection and community events for Hispanic Heritage Month, featuring apparel, kitchen items, and latino-owned brands.

Available

Source: Circana, Complete Consumer, 12ME August 2026 vs. Prior Year, retailer websites, not inclusive

Emerging trend: The rise of electric scooters

"Electric scooter growth reflects a broader shift in urban mobility. As consumers look for cost-effective and efficient transportation alternatives, rising comfort with shared micromobility services and the appeal of short-distance commuting are helping drive demand."



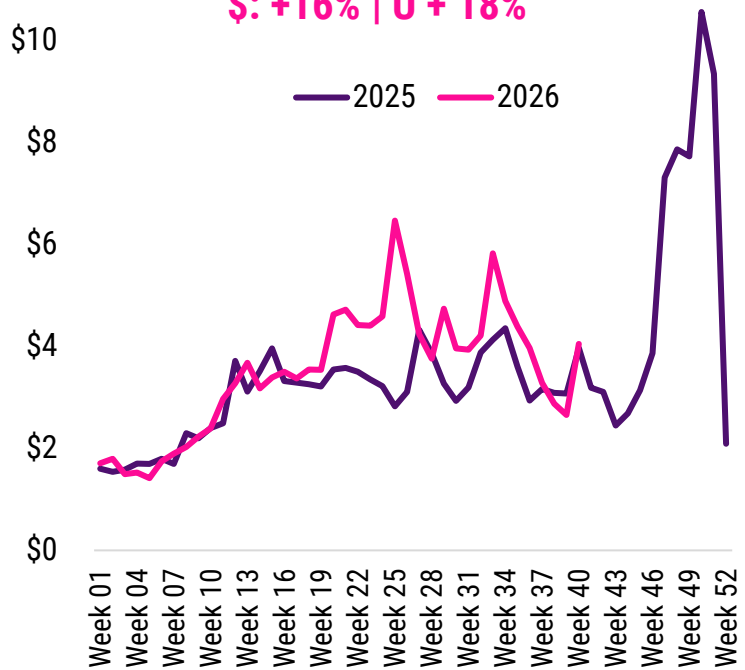
Kirsten McLean
Circana U.S. Books & Entertainment Industry Analyst

$203.5M

High Speed Ride On Annual Dollar Sales

High Speed Ride Ons: Weekly Dollars ($M)

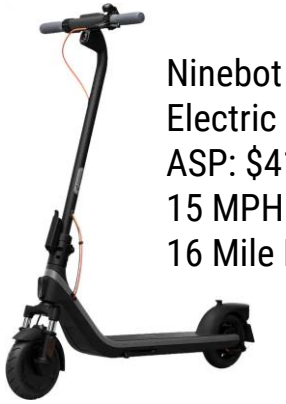
Year-to-Date % Change
$: +16% | U + 18%



Top Growth Spotlight: Segway-Ninebot: $61.9M

YoY: Growth: $: +30% | U: +32%
Brand Average Price: $652

Top Growth Items:



Ninebot E2 Plus II Electric Kickscooter
ASP: $416
15 MPH
16 Mile Range

Slower speed and shorter range great for kids and gifting



Ninebot Max G3 Electric Scooter
ASP: $1,083
28 MPH
50 Mile Range

Faster speed and longer range great for daily commute and errand

Source: Circana, Retail Tracking Service, Toys, Year to date through week ending October 3, 2026
Annual sales = 52 weeks ending Oct 3, 2026

Yesterday’s favorites driving today’s growth

Nostalgia continues to shape consumer spending, with renewed interest in Y2K-inspired fashion, iconic toys, and retro technology driving category growth while brands like Wendy's leverage familiar brand assets to reconnect with shoppers.



Camisoles

$: +14% | U: +83%

Daywear has ranked among the top growing categories for general merchandise driven by the resurgence of camisoles as consumers embrace Y2K-inspired styles that blend familiarity with modern fashion.



Tamagotchi

$: +62% | U: +54%

Nostalgia is extending beyond fashion and into play, with consumers gravitating toward modern versions of childhood favorites. Brands like Tamagotchi and Pets Alive exemplify the trend, with the two accounting for 26% of dollar growth in youth electronics.



Digital Cameras

$: +7% | U: +43%

Growth in digital cameras highlights how nostalgia continues to influence purchasing decisions, with consumers gravitating toward retro products that recreate the look and experience of earlier eras.

In the News



September 2026: Wendy’s introduced a limited time return of its iconic yellow packaging.

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Health and wellness: The next wave of growth

93% of consumers say they prioritize health & wellness, yet only 38% are satisfied with the solutions available today. As expectations shift from products alone to holistic outcomes, retailers have an opportunity to close that gap through social commerce, connected wellness, and AI-powered support.

Which type of self-care and health and wellness activities do you currently practice?
% of consumers

	USA
Physical	71%
Mental/emotional	61%
Social/relationship	54%
Home/environmental	54%
Spiritual	44%
Sensory	40%

The future of health and wellness



Social commerce opens access to the ingredients and outcomes people value
95% of snack bar sales on social commerce carry a protein claim.

Stores are becoming where wellness gets easier
Retailers are launching wellness-centered platforms and shopping experiences. Wellness by Ulta Beauty is a curated retail platform spanning supplements, sleep, fitness, and women's health and wellness devices.





AI supports wellness through health research and planning
Consumers are using AI to research symptoms, find recipes, plan exercises, and guide nutrition/meal planning.

Watch the webinar recording here >

Source: Circana, 2026 Well-being Survey, U.S.; Pew Research; Circana, Social Commerce, YTD 2026 through WE 9/13/2026

Back-to-school Tracking

Dedicated seasonal tracking of the 2026 back-to-school shopping period.

(July – September)





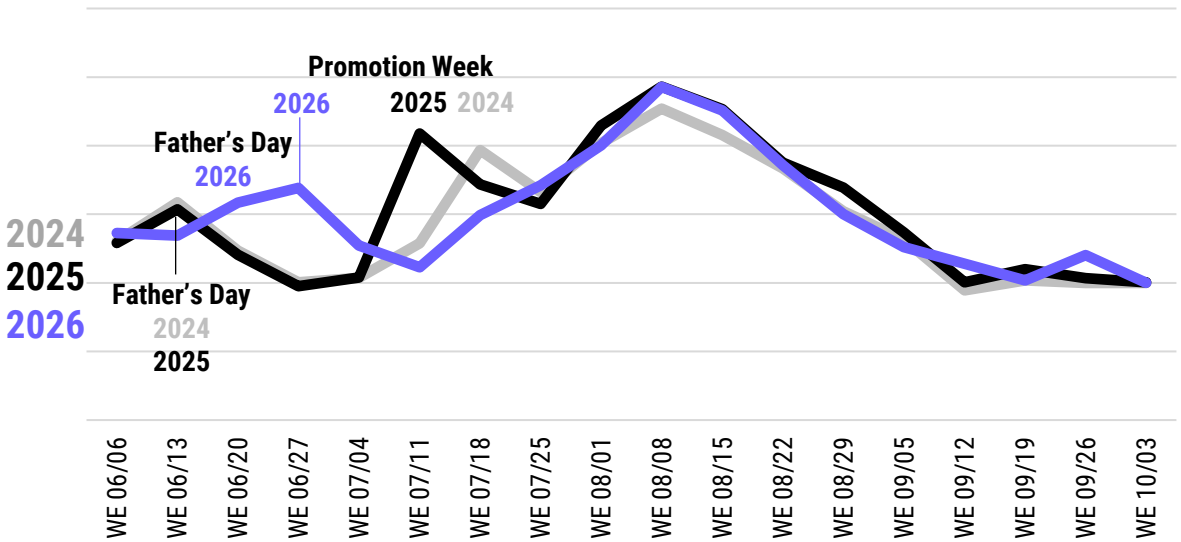
3

Gen merch back-to-school dollar and unit trends

Earlier Promotion Week events helped kick off the season, but they did not materially pull forward demand or dampen later purchases. Back-to-school shopping remained need-based, with consumers continuing to buy when products were required, supporting late season year-over-year unit performance.

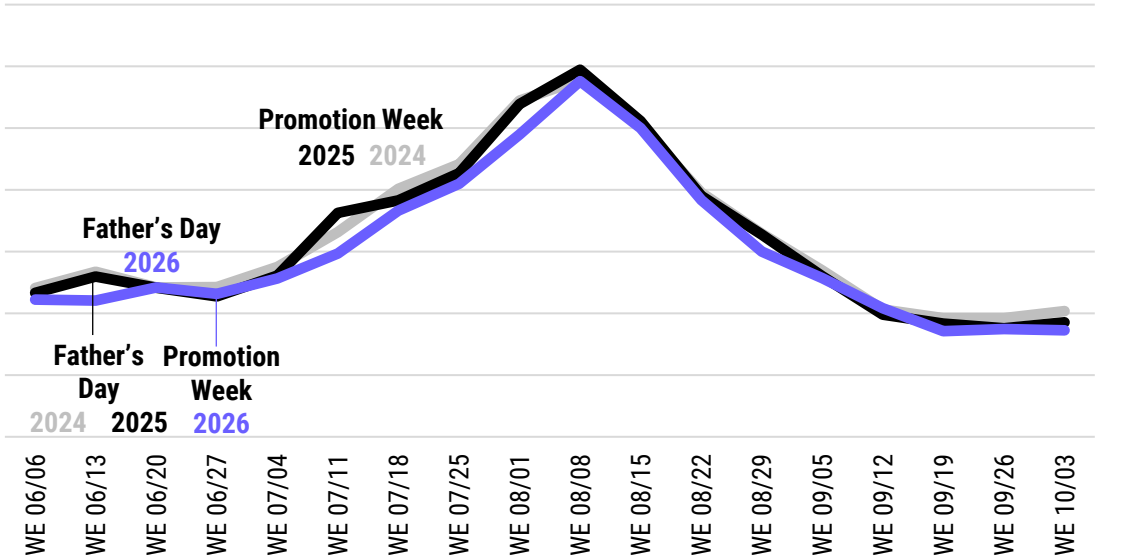
Back-to-school* Dollar Sales by Week through Week Ending Oct 3, 2026

2026 Extended Season $ Performance	
vs. LY	-0.1%



Back-to-school* Unit Sales by Week through Week Ending Oct 3, 2026

2026 Extended Season U Performance	
vs. LY	-3.3%



Source: Circana, Point-of-Sale First Read Data, Limited Release (general merchandise)
Axes are not related
**Back-to-school universe includes accessories (bags); apparel; footwear; housewares (food storage, laundry organization, portable beverage); office supplies, tech (computers, printers, stereo headphones, tablets/e-readers, NA)*

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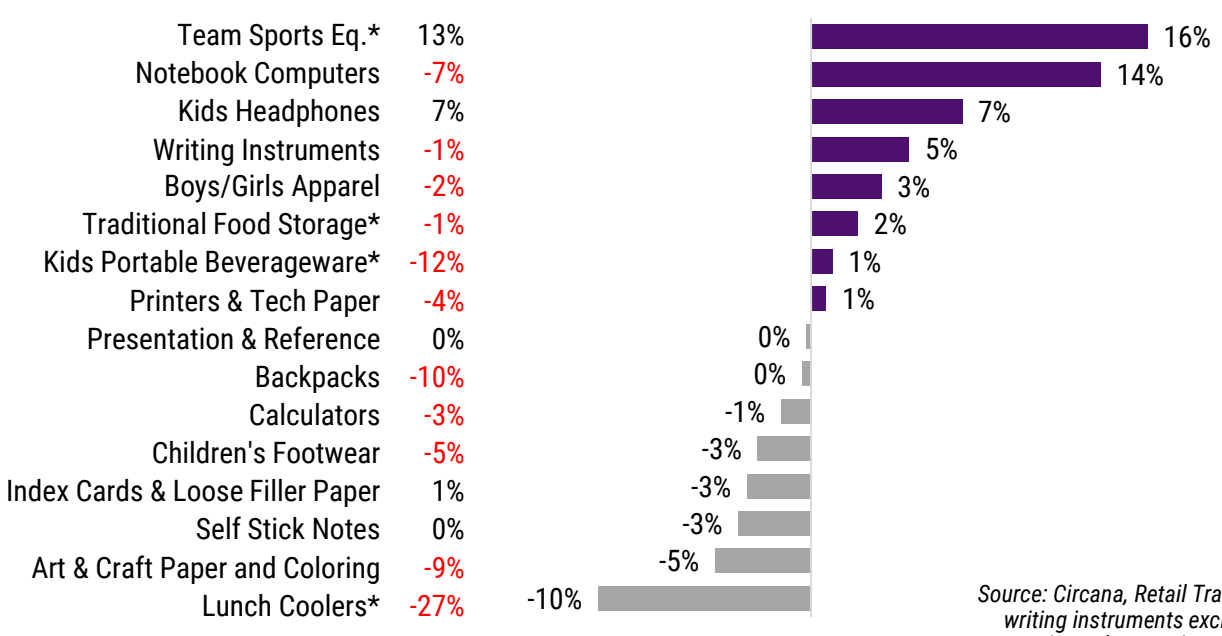
General merchandise back-to-school indicators

Back-to-school related categories experienced soft demand this season driven in part by higher prices and consumer prioritization.

General Merchandise Back-to-school Category Tracking
Extended Season-to-date Dollar Performance 18WE 10/03/2026 vs. Prior Year[1]





Source: Circana, Retail Tracking Service: housewares; technology; office supplies: presentation & reference excludes binding and data binders; writing instruments excludes fine writing and variety packs; team sports equipment includes, football, field hockey, soccer, equipment bags, universal protective gear; accessories, everyday/lifestyle and fashion backpacks; apparel, boys+girls, excludes sleepwear, and swimwear; footwear, boys+girls, excludes outdoor and slippers; Kids headphones defines as stereo headphones with around/on ear headphone style, sound limiting functionality included, and head band band type; Extended season to account for 2026 Promotion Week shift to June
**Team sports eq., lunch coolers, and traditional food storage data through 13W 8/29/2026 due to upgrade timing*

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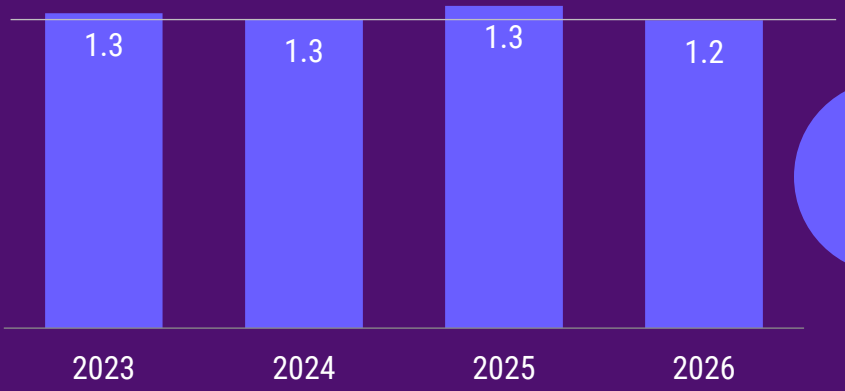
Back-to-school units hit a four-year low in apparel

Back-to-school dollars fell 3% and units dropped 5% to the lowest level in four years; average prices rose about 2%, not enough to offset the lost volume.

Back-to-School Apparel[1] Unit (B) Volume 3ME August



Units
-5%
vs. '25

Get more apparel insights from Back-to-School here >



Channel Trends[1]
Mass and Off-Price gained the most share this season aligned with value priorities.

Private Label[2]
National brand dollars grew 3% driven by price increases and units declined 6%. Private label demand remained flat year-over-year.

Social Commerce[3]
Baby and kids' clothing on TikTok Shop did $38.8M over this period, across about 2,400 shops. The top 15 shops took 38% led by COMFRT and Crocs.

Source: [1]Circana, Consumer Tracking Service, 3ME August 2023 to 2026, Back-to-School Criteria: Apparel bought for school aged Males & Females (5-18 years old); [2]Circana, Retail Tracking Service, 3ME August 2026 vs Prior Year; [3]Social Commerce, Baby & Children Clothing, 35 weeks ending August 30th, 2026 (TikTok Shop)

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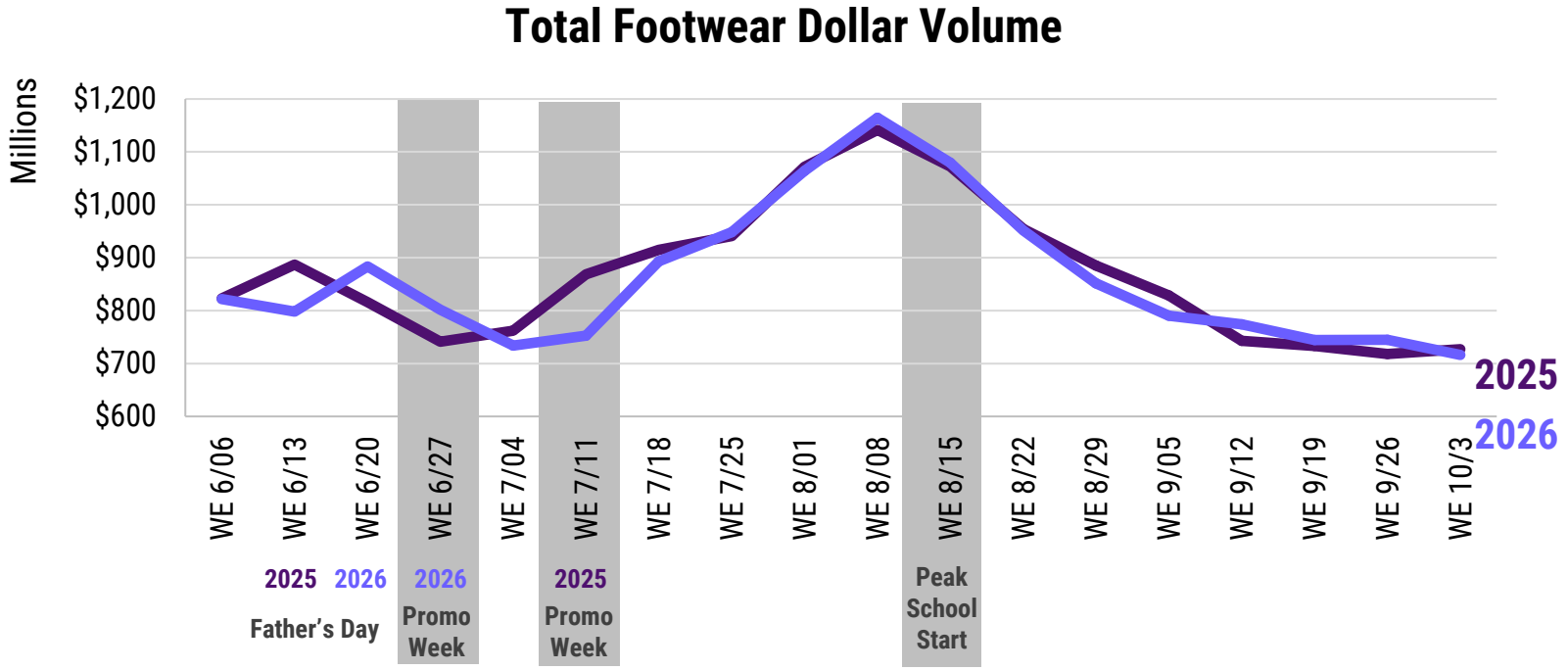
Back-to-school footwear, running a little behind schedule

Calendar shifts created uneven comparisons throughout the season, but as school start dates approached, demand returned to a typical flow. Total market sales remained soft for the extended season, down 1%.



3 ME AUG '26 vs. LY:
Dollars: -1% | Units: -7% | ASP: +6%

	Adults:	Kids':
$	-1%	-4%
U	-6%	-9%
ASP	+6%	+5%



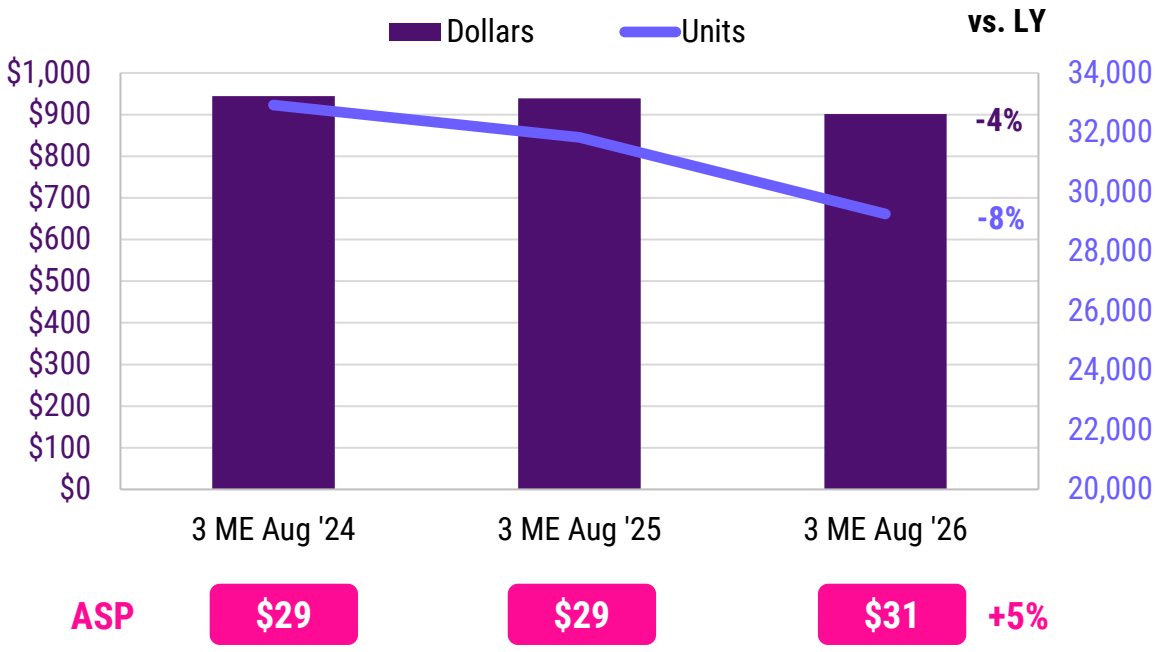
Back-to-school represented a continuation of trends seen from the first half of 2026**. It's all about the consumer's calendar.** We can try to get the consumer to buy early, but they are going to buy when they need. Convenience and value remain important drivers in determining where consumers buy and this is likely to continue reshaping the industry.
Beth Goldstein, Industry Advisor, Footwear and Accessories

Learn more about this year's footwear results from Back-to-School here >

Source: Circana, Retail Tracking Service

Back-to-school 2026: backpacks overview

Demand for backpacks softened this season vs. LY.





[Check out the Back-to-School Recap webinar here >]

Source: Circana, Complete Consumer, Everyday/Lifestyle Backpacks, excludes the off-price channel

Kids' top backpacks licenses

The percent of kids backpack sales generated by licensed styles increased to over 50% this year.

TY Rank		Rank Chg. vs. LY
1	Minecraft	---
2	Hello Kitty	--
3	Spiderman	--
4	Lilo & Stitch	+1
5	Sonic the Hedgehog	+6
6	Bluey	-2
7	Mickey/Minnie Mouse	-1
8	Disney Princess	+1
9	Pokémon	+1
10	Toy Story	+23

Licensed Product % of Sales
3 ME August

47% (2025) → **51%** (2026)

Honorable Mention – Let it Go!

Disney FROZEN

22 Rank LY → **12** Rank TY

Source: Circana, Retail Tracking Service, Kids' Everyday/Lifestyle Backpacks

“Danglecore”

Backpacks as a canvas for self-expression

Squishies, brainrot and an 'emotional support Eleven': Gen Alpha backpacks offer a peek into their world

*“Backpacks have long been a source of self-expression – Disney Princesses, superheroes, sports teams. For Gen Alpha, the customization is even more layered: charms, sushi key chains, Liila dolls, plush clips and **danglecore** transform the outside of a bag into its own mood board.”*

+165%

Accessories key fobs/ charms





>+200%

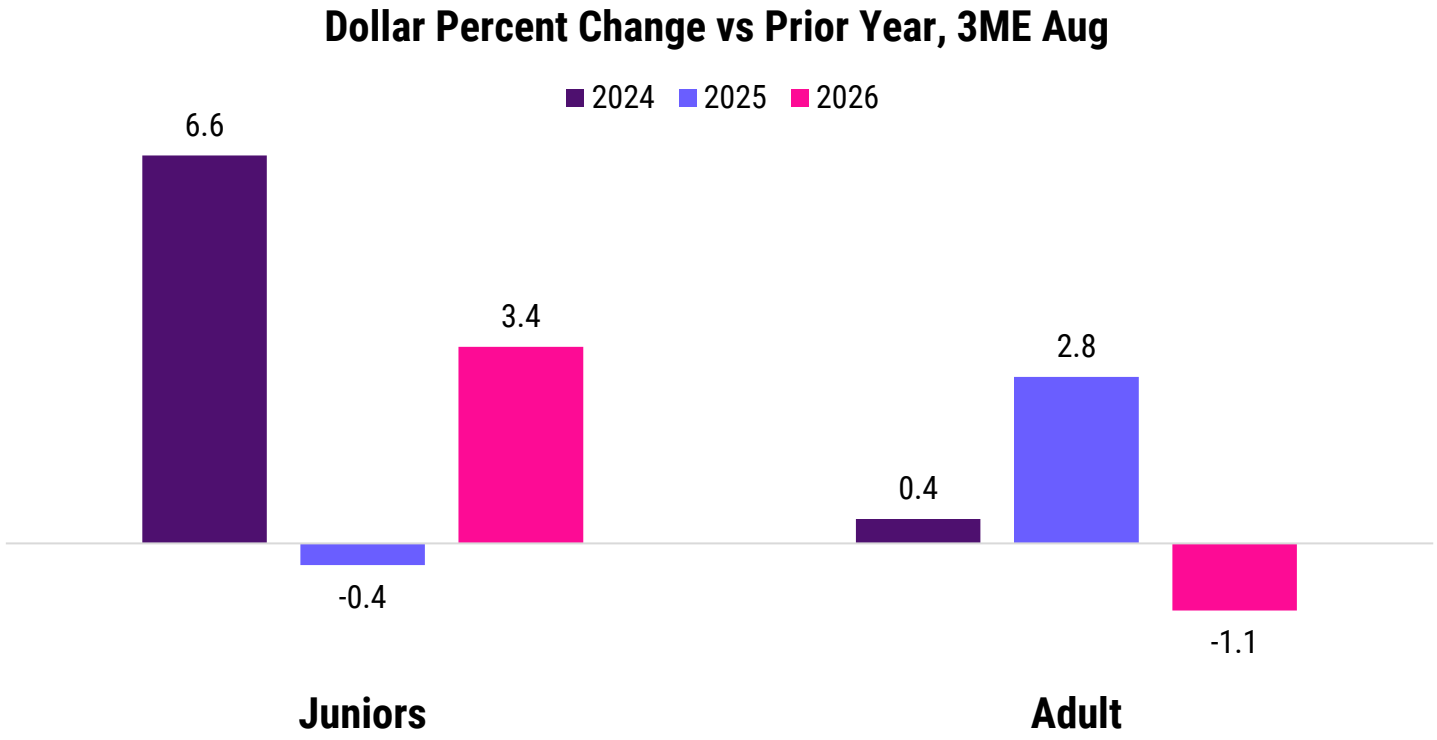
Toys keychains/ charms

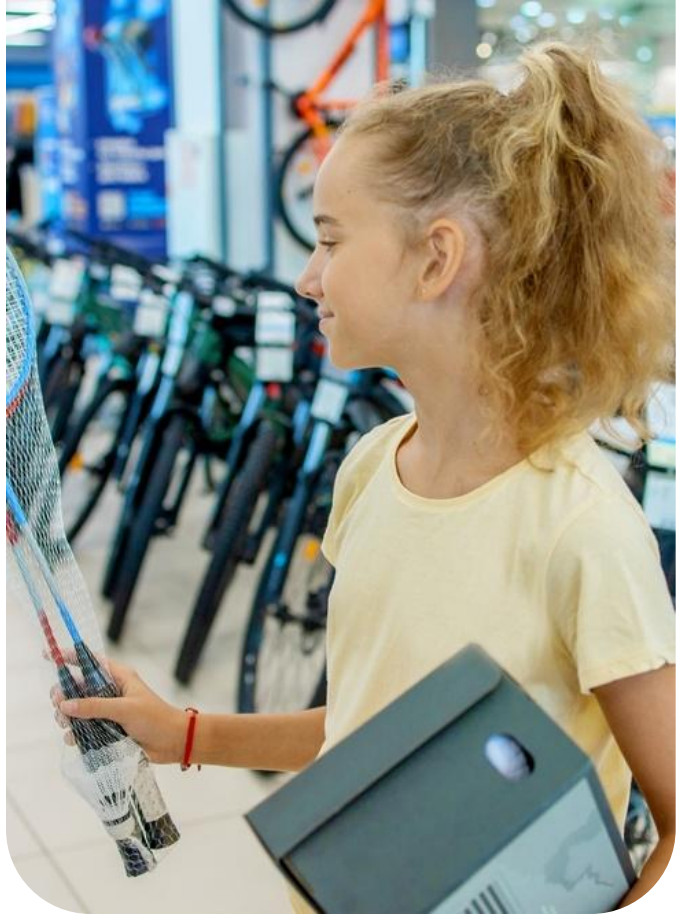
Article source: Yahoo.com, 9/17/26

Data source: Retail Tracking Service, Toys and Accessories Industries, dollar sales, 3 ME Aug ’26 vs. LY

Higher spending on junior sports

Overall team sports equipment dollars were flat for the 3ME period. Junior sales outpaced as strong consumer interest and high participation rates helped drive sales.





Growth has been fueled by baseball/softball, football, and soccer, with juniors accounting for 16% of recent sales and 17% of annual dollars

[Learn more about the role of sports equipment as part of the Back-to-School season here >]

Source: Circana Retail Tracking Service, US Team Sports Equipment, 3ME August 2026

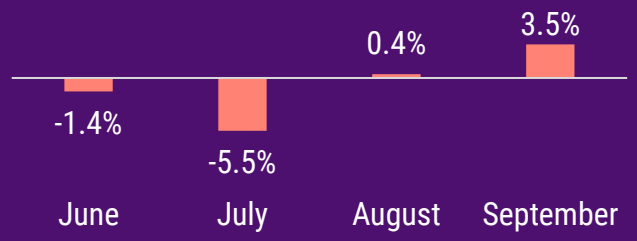
Office supplies: A lesson in last-minute spending

Office Supplies Trends[1]

Extended Season vs. LY
18WE 10/03/2026

$	U	ASP
-1.1%	-1.3%	+0.3%

Monthly Unit % Chg vs. LY





September provided a final boost for office supplies as later school start dates kept back-to-school shopping active well beyond the traditional summer period. The performance reinforces a more intentional purchase journey centered on immediate needs.

E-commerce is capturing a growing share of peak BTS office supplies sales. **E-commerce now captures ~1/3 of August office supplies dollars.**[2]

Brick-and-mortar retail sales also increased during the final weeks, marking the **second consecutive year of late-season growth** for physical retail.[1]

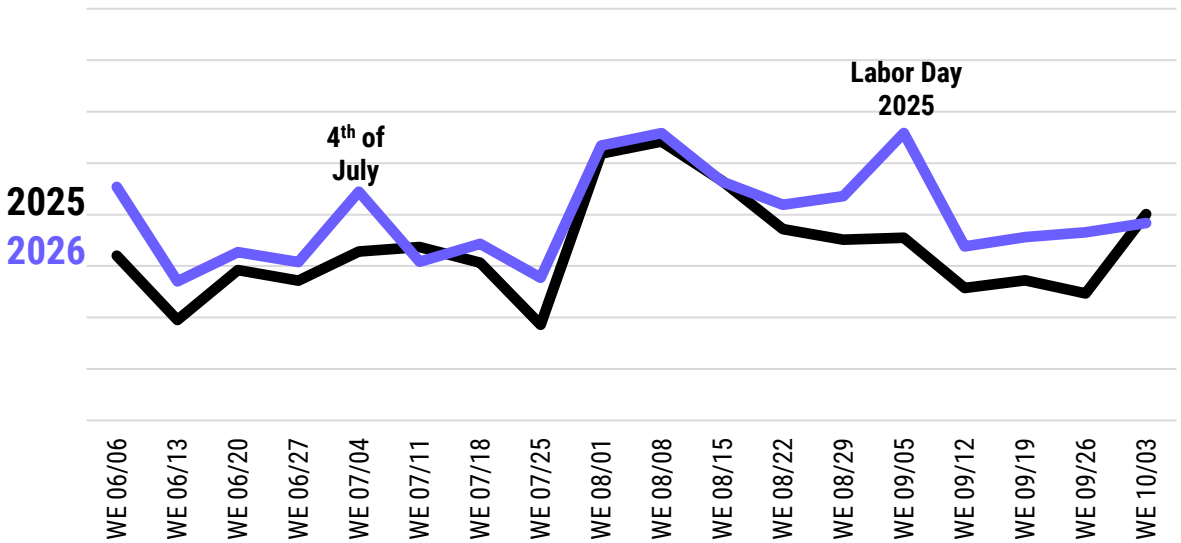
Source: [1]Circana, Retail Tracking Service, office supplies; [2]Circana, Complete Consumer, August 2026, Office Supplies

Nonedible CPG back-to-school trends

The 2026 back-to-school season unfolded over a longer timeframe, as a later Labor Day delayed some classroom returns and helped sustain demand for nonedible essentials deeper into August and early September.

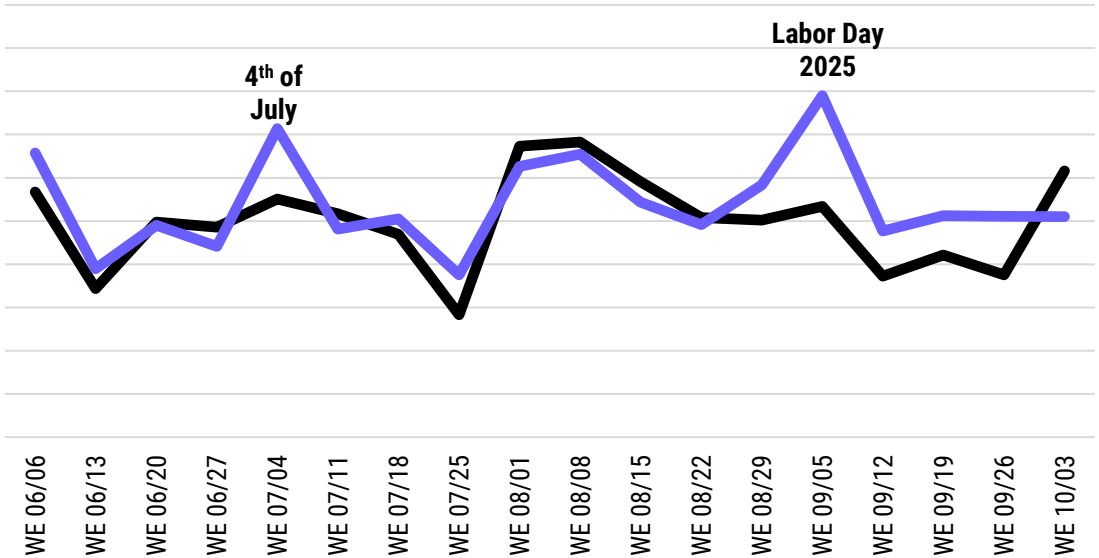
Nonedible CPG Back-to-school* Dollar Sales by Week through Week Ending Oct 4, 2026

2026 Extended Season $ Performance	
vs. LY	2.1%



Nonedible CPG Back-to-school* Unit Sales by Week through Week Ending Oct 4, 2026

2026 Extended Season U Performance	
vs. LY	1.0%



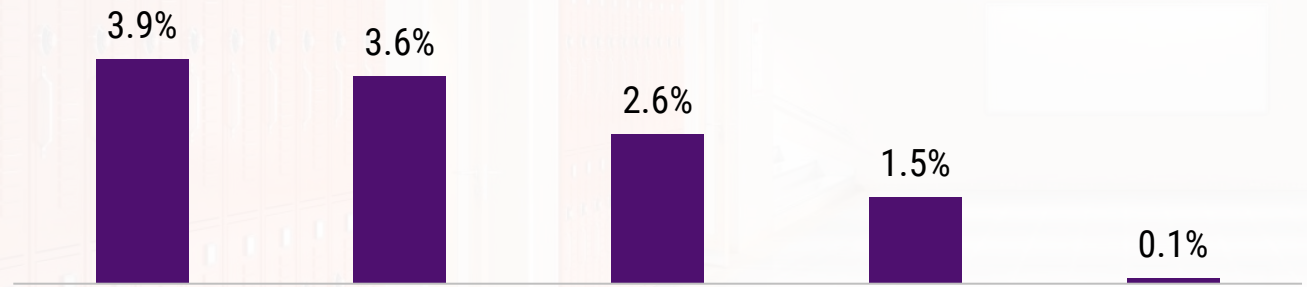
Source: Circana, total market view MULO+ convenience with and MULO+ perimeter (nonedible CPG-excluding tobacco) – week ends on a Sunday; Axes are not related

**Back-to-school universe includes all purpose cleaners, baby wipes, facial tissues, toilet paper, paper towels*

Nonedible CPG back-to-school indicators

Household essentials played an increasingly important role in back-to-school shopping this year, with products often appearing directly on supply lists.

Nonedible CPG Back-to-school Category Tracking
Extended Season-to-date Dollar Performance 18WE 10/04/2026 vs. Prior Year



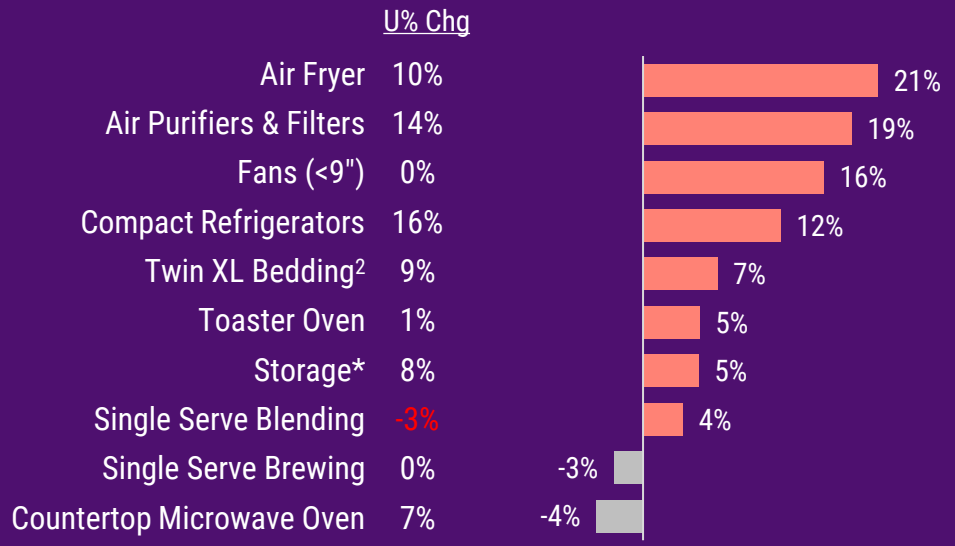
	All Purpose Cleaners	Facial Tissue	Paper Towels	Toilet Tissue	Baby Wipes
Vol % Chg	**+3.9%**	**+3.4%**	**+2.0%**	**+0.6%**	**-1.1%**

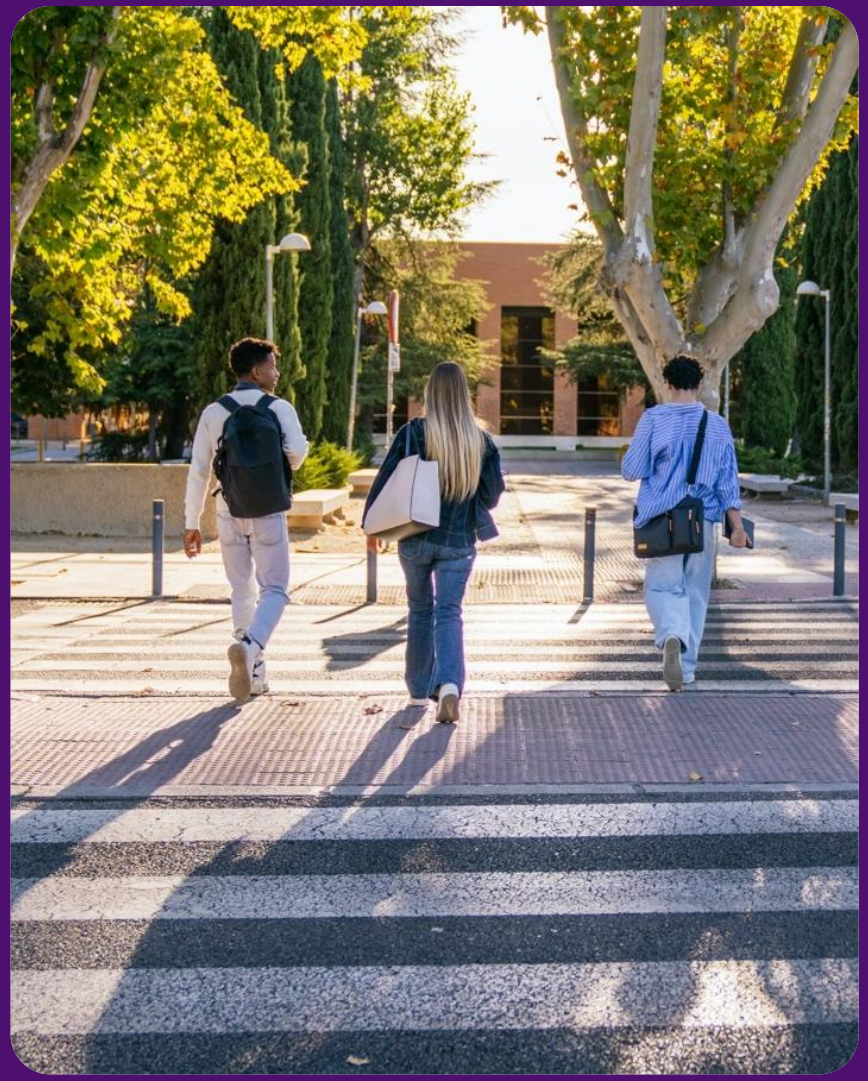
Source: Circana, total market view MULO+ convenience with and MULO+ perimeter (F&B/nonedible CPG-excluding tobacco) – week ends on a Sunday 13WE August 30, 2026 vs. Prior Year

College essentials for dorm and apartment life

Back-to-college shopping kicks off around May with basics, but this season extends through September when students arrive on campus and continue purchasing appliances, décor, and other finishing touches.

Back-to-College Category Tracking
Season-to-date Dollar Performance 22WE 10/03/2026 vs. Prior Year[1]





Source: [1]Circana, Retail Tracking Service, small appliances, office supplies (general merchandise); [2]Circana, Complete Consumer, home textiles, 5ME September2026 vs. Prior Year;
**General Storage includes plastic storage that has a total capacity between 40 - 56 qts or between 10 - 14 gallons. Items that are marketed as "under the bed storage" will fall here as long as they follow capacity guidelines*

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Back-to-school: Lesson from 2026, Actions for 2027

Follow the Consumer's Calendar

What We Saw:
Early promotions did not meaningfully pull demand forward.

2027 Activation:

- Keep inventory, media support and promotional activity strong through August and September.
- Build flexible plans that align with local school calendars rather than forcing early purchases.

Value Means More Than Price

What We Saw:
Consumers remained selective and focused on immediate needs.

2027 Activation:

- Offer clear good-better-best assortments and emphasize quality, durability and convenience alongside price.
- Clearly communicate "worth the spend" benefits that justify trade-up purchases and build shopper confidence.

Own More of The List

What We Saw:
Shopping expanded beyond supplies to everyday classroom essentials.

2027 Activation:

- Merchandise complete classroom solutions across gen merch, consumables and technology.
- Build cross-category solutions that serve students, teachers, and classrooms.

Digital Discovery Shapes Demand

What We Saw:
TikTok Shop and social trends influence what students splurged on.

2027 Activation:

- Connect social content, influencer partnerships, and in-store merchandising to spotlight trend-led products.
- Monitor social trends earlier and build agile assortments that can respond quickly to emerging demand.

Looking Ahead

A collection of topics to help you stay up to date and prepare for upcoming events.

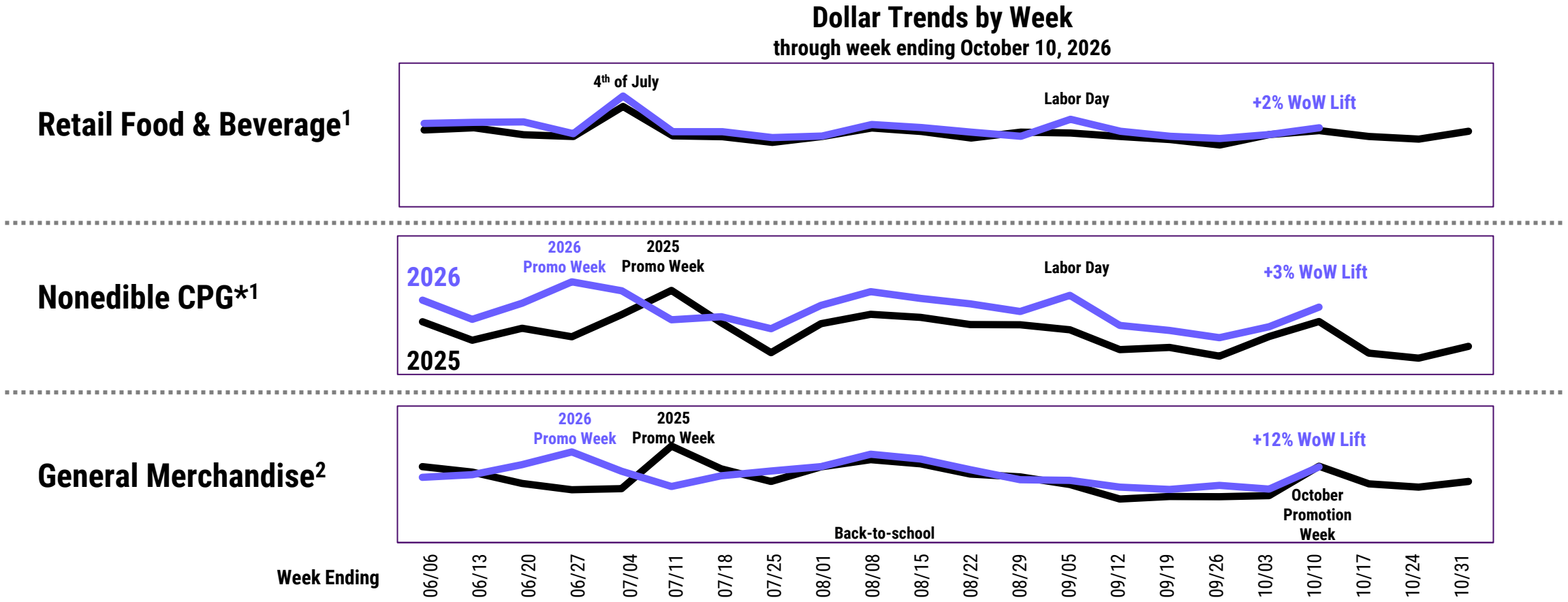




4

Promotion Week related dollar lift across retail

Promotion Weeks typically drive a dollar lift in general merchandise; however, we continue to see a similar sales lift in nonedible CPG during these periods in some promoted categories.

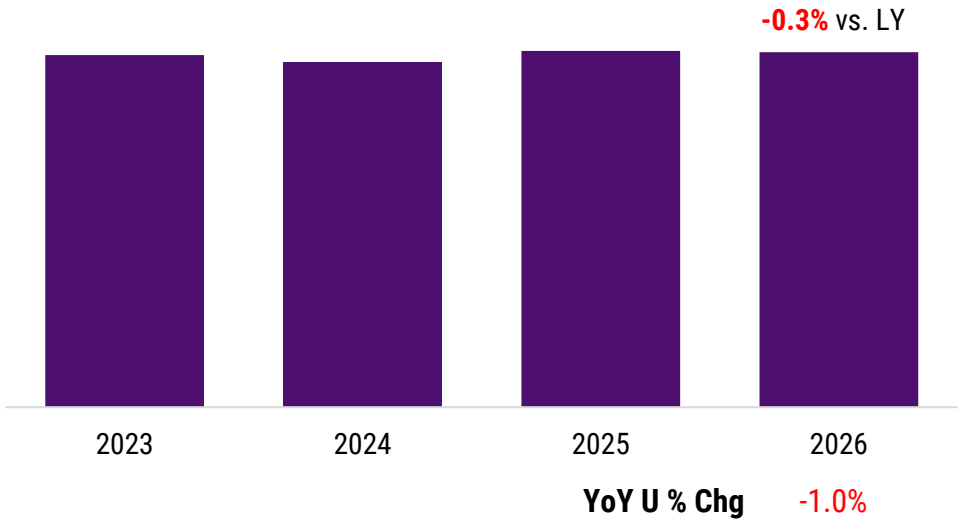


*Sources: [1]Circana, Total Market View MULO+ Convenience and Perimeter (F&B/nonedible CPG – *excluding tobacco, general merchandise, auto departments) – week ends on a Sunday, [2]Circana, Point-of-Sale First-Read Data/Limited Release (general merchandise); Axes on charts are not related; week-end dates based on 2025.*
**Note - the POS-based insights featured here do not include a read on 3P Marketplace. This content represents preliminary results and will differ with the release of monthly data*

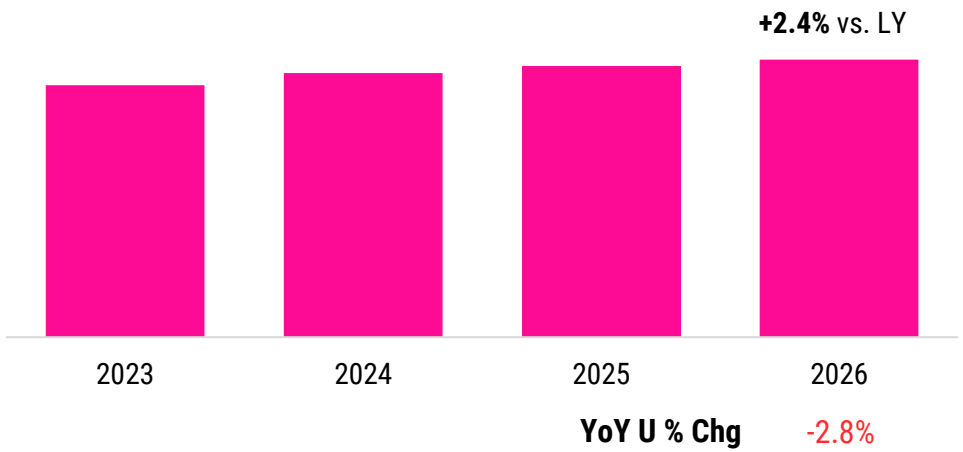
Promotion Week topline dollar performance

While unit sales softened across both general merchandise and nonedible CPG categories, dollar trends remained more resilient. General merchandise dollars were largely unchanged versus last year, while nonedible CPG generated modest dollar growth despite lower unit demand.

General Merchandise[1]
Promotion Week Shopping
Dollar Sales ($B) 1 Week of Promotion Week



Nonedible CPG[2]
Promotion Week Shopping
Dollar Sales ($B) 1 Week of Promotion Week



Source: [1]Circana, point-of-sale first-read data, limited release (general merchandise);
[2]Circana, total market view MULO+ with conv and MULO+ with perimeter (non-edible CPG- excluding tobacco and GM)– week ends on a Sunday;
Nonedible CPG excluding GM includes Health, Household Essentials, Mass Beauty, Pet, Disposable Tableware, Foils/Wraps/Bags, Household Plastics, Misc. Gen Merch, Pest Control
Promotion Week 2023: 1WE October 14, 2023; 2024: 1WE October 12, 2024; 2025: 1WE October 11, 2025; 2026: 1WE October 10, 2026;
**Note - the POS-based insights featured here do not include a read on 3P Marketplace. This content represents preliminary results and will differ with the release of monthly data.*

Retail competes to capture spend through year-end

TARGET | Oct 6-7



Two-day event featuring broad deals alongside prominent Halloween and early Christmas merchandise.

WALMART | Oct 5-11



Weeklong event featuring broad category deals, Top 100 offers and Halloween, while reinforcing Walmart+ membership benefits.

KOHL'S | Oct 5-8



Four-day Deal Days event spanning apparel, home, beauty and seasonal offers with daily deal messaging.

BEST BUY | Oct 5-11



Weeklong Techtober sale focused on electronics and must-have tech, with daily deals advertised up to 50% off.

SAM'S CLUB | Oct 5-11



Weeklong event featuring limited-time offers across electronics, home, seasonal and larger-ticket items, reinforcing member value.

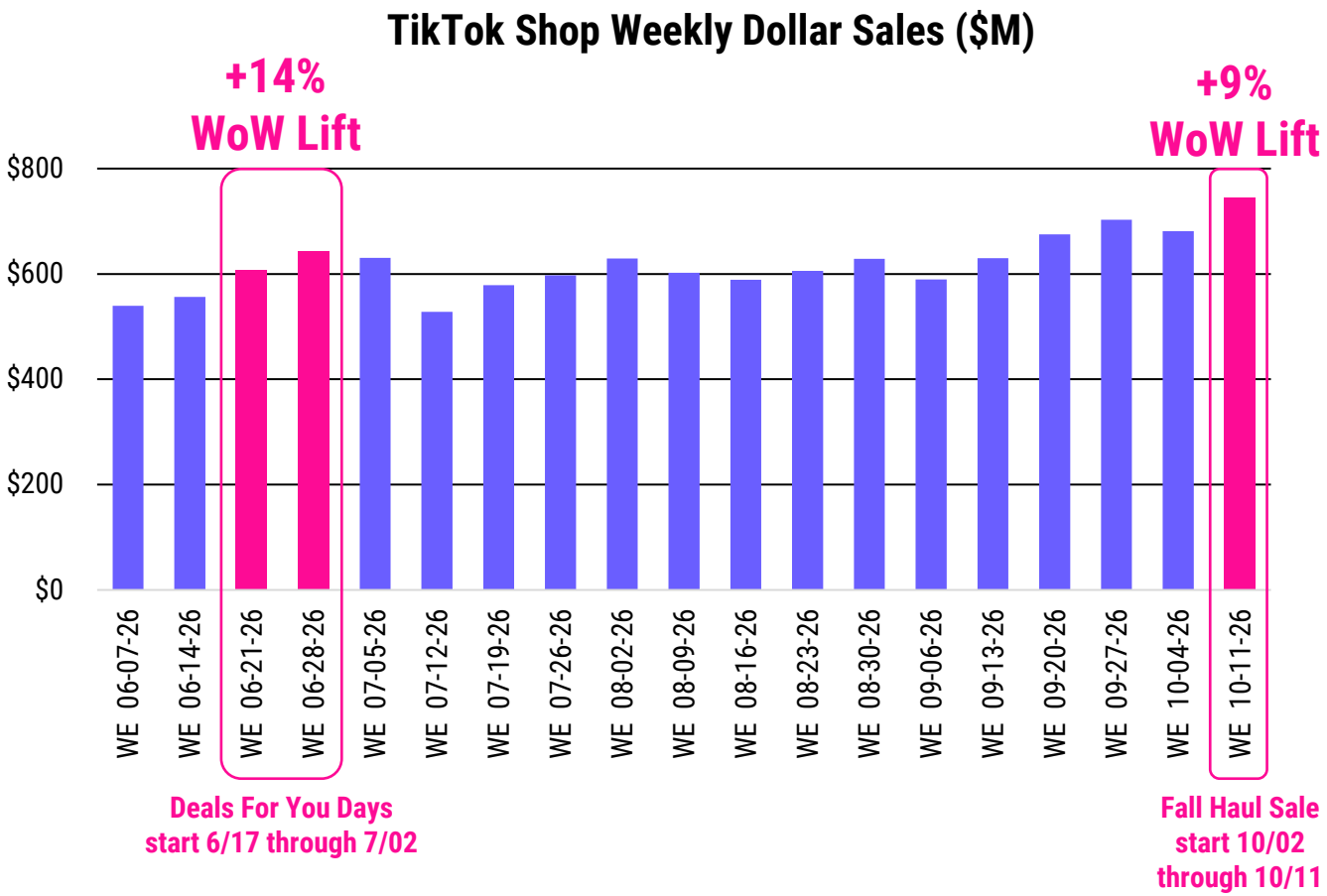
DOLLAR GENERAL | Oct 4-10



Seven Days of Savings featuring value-led offers across Halloween, seasonal and everyday essentials

Sources: Retailer websites

TikTok Shop competed alongside October promos, driving a 9% lift. Sales grew more than 120% vs. last year's events.



+124%

TikTok Shop **dollar sales increased 124% versus last year's Fall Deals for You event,** reflecting growing consumer familiarity and comfort discovering and purchasing products directly through social media.





Fall Haul's 9% week-over-week lift reflects a broader retail reality: while consumers remain responsive to promotional moments, **October events typically generate less incremental demand than summer sales** periods.

Available

Source: Circana, Social Commerce, 19 weeks ending October 11, 2026 (TikTok Shop)
2025 Fall Deals for You Days: WE 10/05/2026 = peak shopping week,
2026 Fall Haul Sale: WE 10/11/2026

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Halloween 2026 intentions

More than half of families plan to celebrate Halloween this year. Passing out treats and decorating ranked as the top activities, but intent declined compared to last year. On the other hand, attending Halloween parties or community events grew along with intent around popular ‘boo bags’.

What activities will you/your family be participating in this Halloween season?





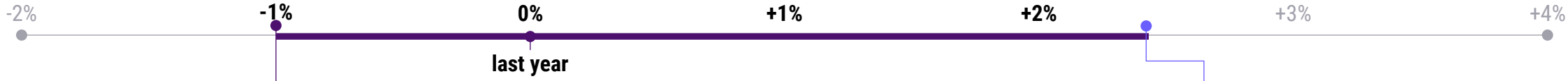


Source: Circana Shopper Survey, September 2026; Q: What activities will you/your family be participating in this Halloween season? Base = Plan to celebrate the holiday 588

Holiday 2026 demand remains resilient, but every dollar must be earned

Willingness to spend is up, but shoppers are stretching every dollar. Both forces show in the survey.

Circana holiday retail spend outlook change in retail dollars vs. last year's holiday period



Pulling toward -1%

- **$779** average planned budget vs. $796 last year (-2%).
- **57%** rate the economy fair or poor (+3.0 pts*).
- **49%** are spending less because their economic situation changed or is uncertain (+3.6 pts*).

Pushing toward +2.5%

- **+12 pts** net spend intent (more minus less), a 5-year high vs. +10.0 last year.
- **37%** say their finances or the economy will make them spend more (+3.1 pts*).
- **48%** of parents plan to spend more, vs. 20% of non-parents*.

Available **Read the 2026 Holiday Purchase Intentions Report here**

Source: Circana, Annual Holiday Survey, fielded September 2026 (n=3,534). Q.1, Q.2, Q.11c, Q.11d, Q.C1, Circana, Point-of-Sale First-Read Data/Limited Release (general merchandise)

Some of this month’s headlines

Here’s a small sampling of this month’s latest blog posts and upcoming webinars.

A Seasonal “Boo-st”: How Halloween 2026 Is Shaping Up Across Categories

Spooky season has arrived. With it comes a cauldron of swirling consumer behaviors and opportunities for brands, retailers, foodservice operators, and others with Halloween-themed offerings. Halloween remains a major holiday for many consumers, with Circana data showing that about one-half of families in the U.S. plan to celebrate the occasion.

Spot Risks and Opportunities the Moments They Emerge in the New AI Path to Purchase

Insights and analytics leaders face a growing need to deliver faster, sharper decisions, and the traditional reporting cycle can no longer keep pace. Circana's Liquid AI digital intelligence platform gives these leaders a decisive edge: reducing chokepoints, swiftly surfacing what matters, and freeing their teams to focus on the high-impact work that moves the business forward.

Flavor Tourists: How Consumers Worldwide Are Broadening Their Snack Palates

Consumers across global markets are evolving into epicurean snackers, gravitating toward adventurous cultural flavors and layered profiles that balance heat with sweet, smoky, and tangy notes. This appetite for experimentation is fueling notable category expansion and premiumization.



Find more insights here >

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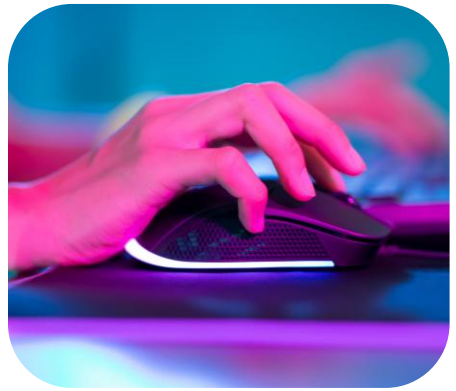
General Merchandise Category Results

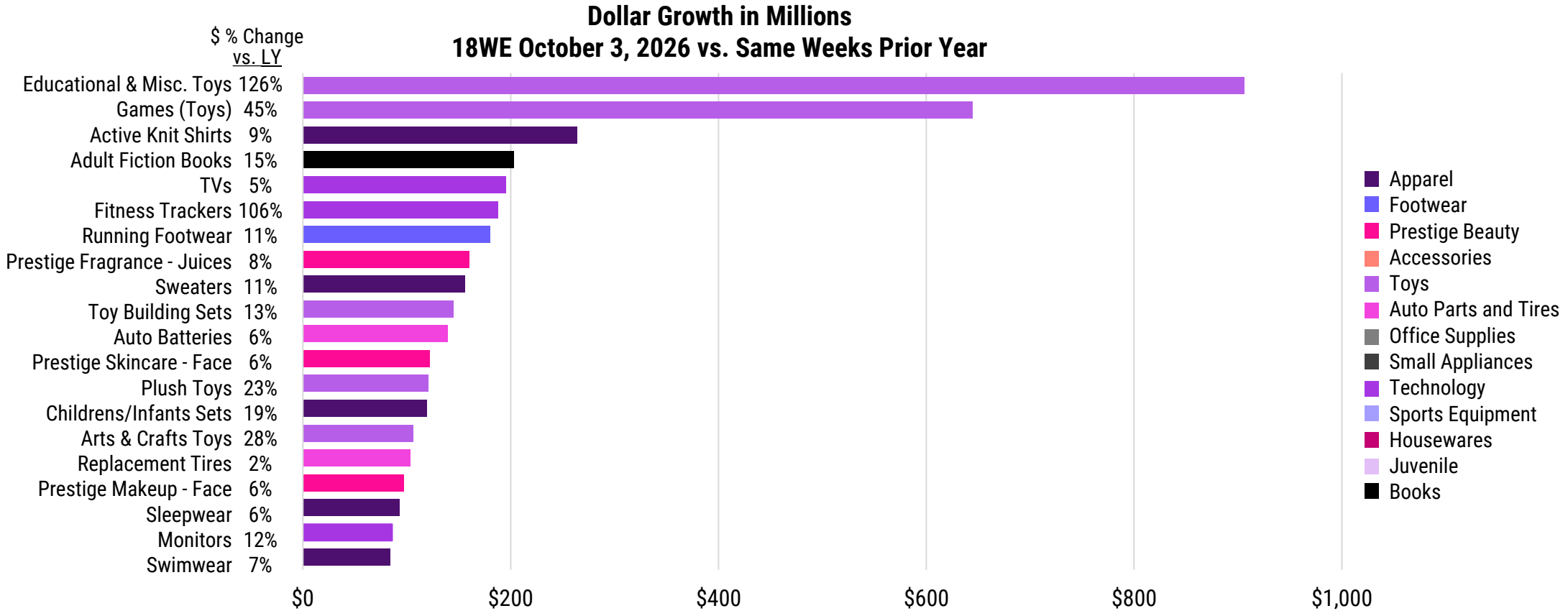




5

Gen merch top 20 categories by dollar growth

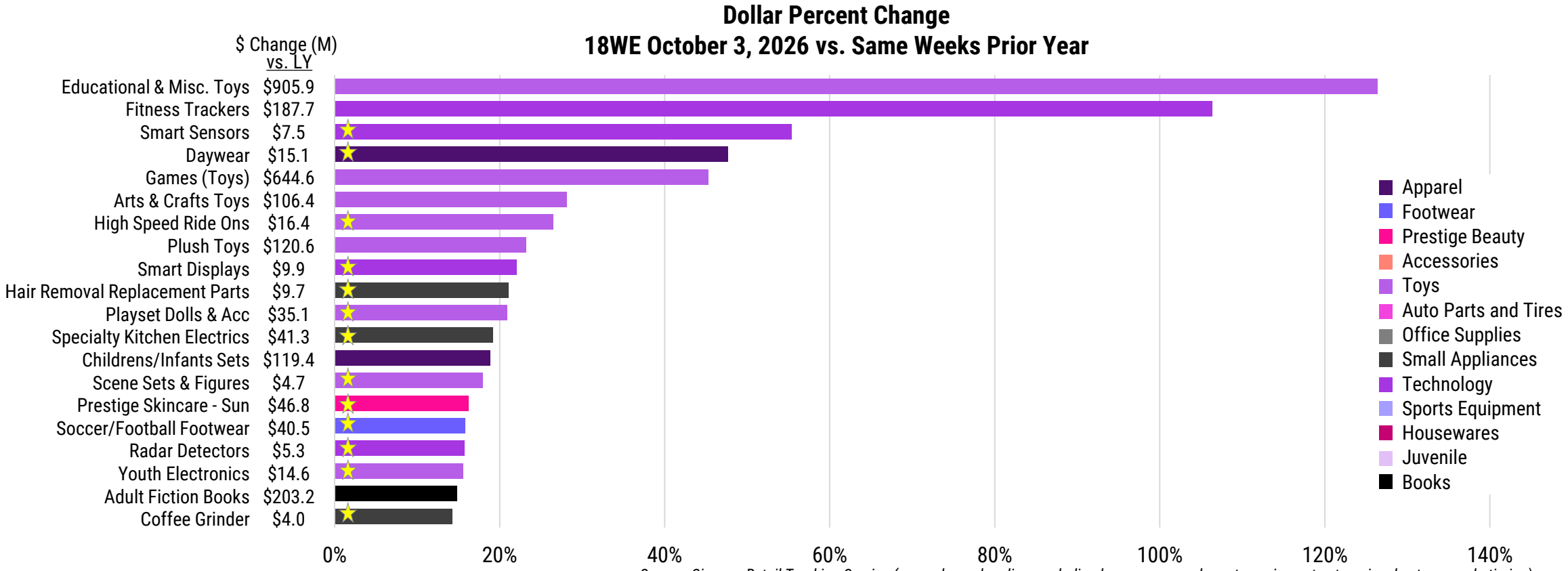
Growth continues to be fueled by engagement-driven categories, as consumers spend more on hobbies, fandoms, and recreation, with squishy toys, trading cards, books, and running footwear all ranking among the largest growth categories in the latest 4ME Sep'26.



*Source: Circana, Retail Tracking Service (general merchandise, excluding housewares and sports equipment categories due to upgrade timing); Top growth based on absolute dollar change vs. last year **and positive unit growth** vs. last year*

Gen merch top 20 fastest-growing categories

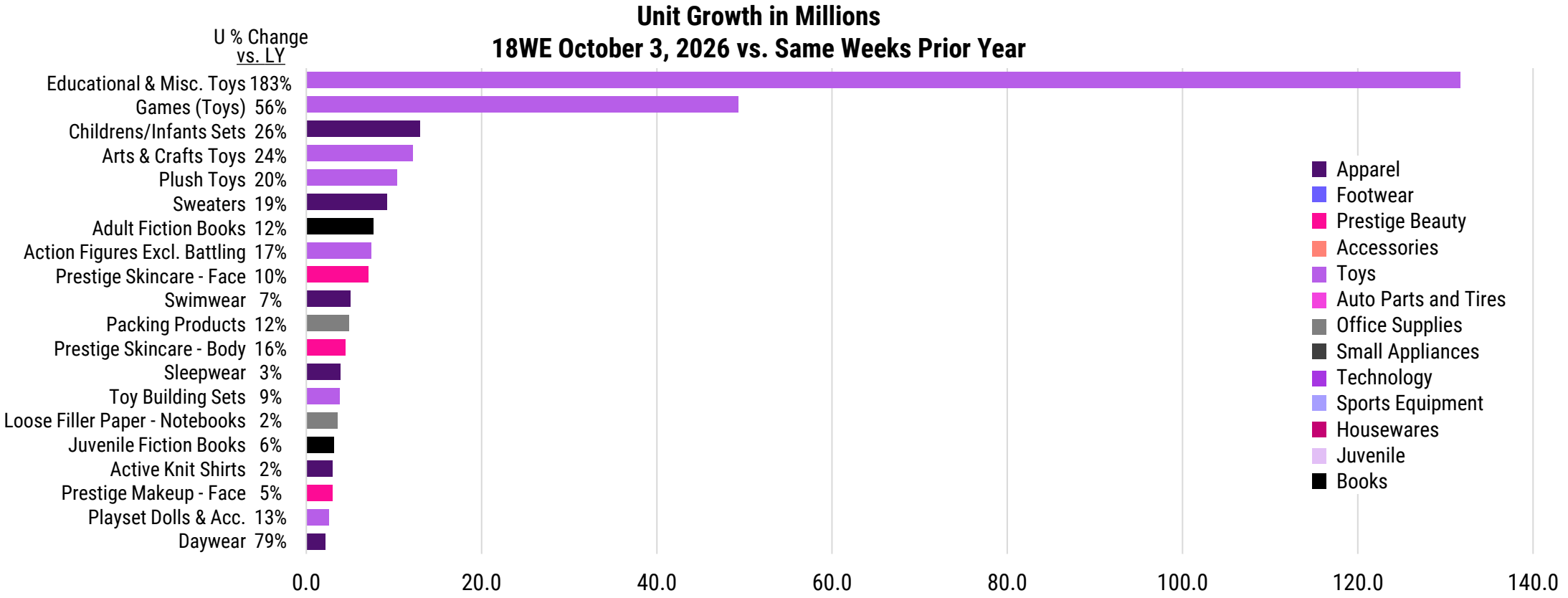
Fastest growing categories in the 4ME Sep'26 reflect continued consumer interest in toy categories driven by squishies. Pockets of growth within tech such as fitness trackers and connected-devices reflect consumer priorities associated with health and elevating at-home routines.



*Source: Circana, Retail Tracking Service (general merchandise, excluding housewares and sports equipment categories due to upgrade timing); Sorted on dollar percent change vs. last year, **and** positive unit growth, **and** filtered on 2026 $ sales >$20M;*
Indicates categories that do not appear in the overall top 20 dollar growth

Gen merch top 20 categories by unit growth

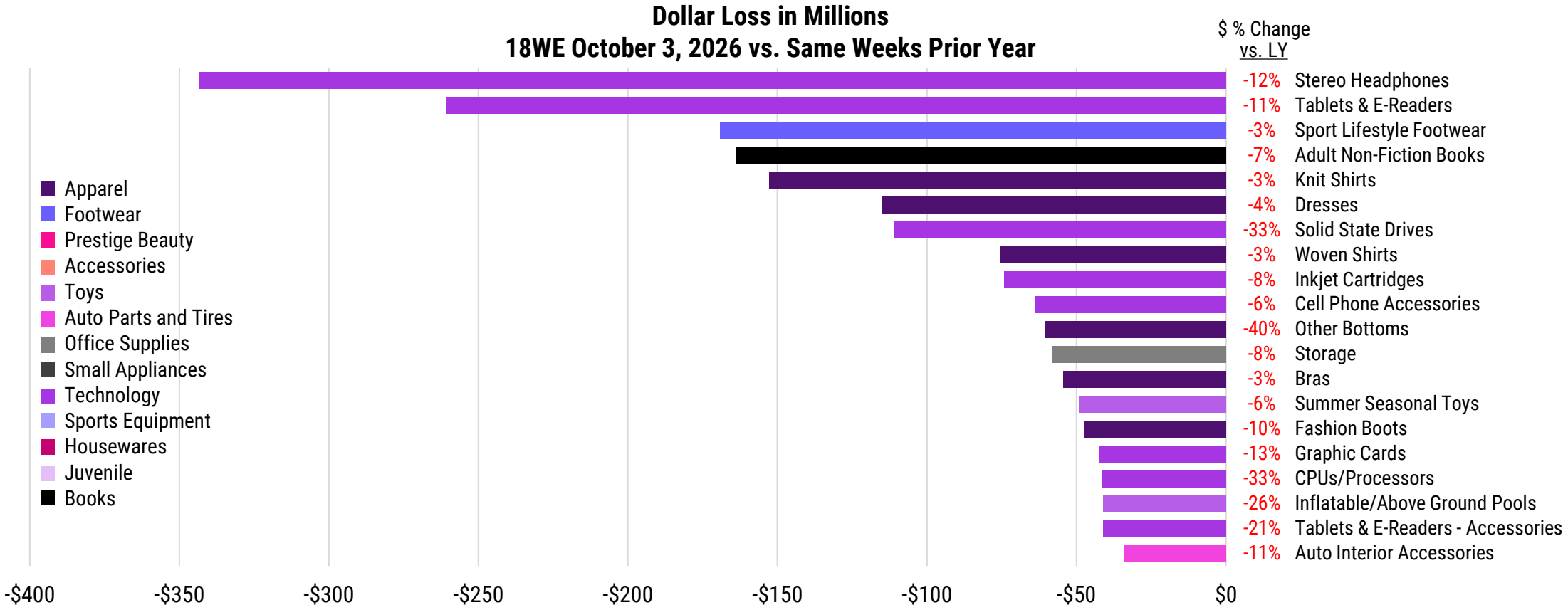
Toys accounted for three forths of the top general merchandise unit growth in the 4ME Sep'26, led by growth in squishy toys like NeeDoh, and collectible trading cards.



Source: Circana, Retail Tracking Service (general merchandise, excluding housewares and sports equipment categories due to upgrade timing)

Gen merch bottom 20 categories by $ declines

Stereo headphones and tablets and e-readers ranked as the top dollar decline categories as sales face tough comparisons against last year's newly launched products from Apple.



Source: Circana, Retail Tracking Service (general merchandise, excluding housewares and sports equipment categories due to upgrade timing)

Appendix

Behind the Insights: Retail Results

The data, expertise, and resources behind today's insights and tomorrow's strategy.

Ready to move from insight to impact?

Partner with Circana to turn these findings into growth strategies, competitive advantage, and measurable business results. Contact your account representative or email contactus@circana.com

Powered by Data | Trusted Sources

Retail Early Indicator: U.S. Weekly

Provides preliminary point-of-sale results from 14 general merchandise industries. Retail Early Indicator provides a leading indicator on consumer spending in the U.S. in advance of the full syndicated dataset's release.

Consumer Tracking Service

The 8 million nationally representative interviews we conduct each year enable us to measure consumers' purchasing behavior and key attitudes across key retailers and channels (e.g., brick-and-mortar, online) in more than 24 industry sectors.

Integrated Fresh

Built on comprehensive POS data, Integrated Fresh provides industry-standard measurement of fresh categories, helping clients better understand performance across produce, meat, bakery, deli, seafood, and more.

Omnibus Survey

By blending consistent tracking questions with topical market exploration, our monthly survey reveals enduring consumer patterns and the emerging trends shaping future demand.

Retail Tracking Service

Circana's unmatched ability to capture store-level data feeds directly from retailers, revealing how products sell in the locations where they are carried. That lets us accurately report below a national level so you can monitor sales, distribution, pricing, and velocity by retailer, region, or market.

Multi-outlet+ with Convenience

Circana's MULO+ universe is a truly omnichannel view, including everything from brick-and-mortar stores and online pure plays, to in-store pickup, from-store delivery, and direct-ship options. Grounded in POS census-level data, MULO+ is the most complete and accurate POS-based CPG market measurement universe.

Social Commerce

Circana's Social Commerce Solution captures experience-driven purchase data daily through TikTok Shop. Whether you need to better understand product or shop performance, deploy faster decision-making with daily shopper metrics or discover new trends, Social Commerce will allow you to unlock new growth opportunities for your business

Guided by Expertise | Thought Leaders

Circana Thought Leadership Advisors/Analysts

With in-depth knowledge of the industries they serve, our industry experts help clients understand and react to changes in the market by thoroughly examining the key drivers behind category performance and trends. Learn more here.

Fueled by Discovery | Explore Further

Holiday Purchase Intentions Report

Reveals what's driving consumer behavior – from price sensitivity and mobile shopping to social media influence and gifting trends. Read from this year's report here.

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Thank you.

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