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U.S. Cross-industry Shopping Trends

Q1 2026



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U.S. Cross-industry Shopping Trends

U.S.-based consumer shopping trends across Circana's portfolio



Understand the size of Circana's portfolio, totaling $3.5 trillion annually across food, nonedible CPG, and general merchandise.

Keep a pulse on macroeconomic factors impacting consumer spend.

Understand top-line e-commerce penetration and trends across retail.

Monitor trends via the winning and declining departments, aisles, and categories across the store.

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We capture the complete

$3.5T retail market across **8 segments**

Complete Food & Beverage	Home	Fashion	Complete Beauty & Health
Entertainment	Technology	Tobacco	Auto Aftermarket & Tires

Source: Circana, Checkout (accessories, auto, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies – excludes janitorial/breakroom, small appliances, sports equipment – includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books – MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and nonedible CPG); Complete Consumer (pet care)

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$3.5 trillion in sales by segment ($B)

+3.0%

Complete Food & Beverage
$1,790 | +3.3%

Retail Food & Beverage	$1,080 | +3.1%
Foodservice	$709 | +3.6%

Entertainment
$174 | +4.4%

Video Games	$62 | +5.1%
Toys	$47 | +9.0%
Sports/Team Sports Equipment	$34 | +2.4%
Books	$15 | -0.6%
Juvenile Products	$10 | -1.2%
Cycling	$6 | -3.0%

Home
$557 | +2.8%

Home Improvement	$121 | +4.6%
Other Consumables	$102 | +2.0%
Pet Care	$90 | +5.4%
Home Textiles	$47 | +3.7%
Home Care	$45 | +1.8%
Small Appliances	$45 | +1.2%
Housewares	$32 | -1.0%
Furniture	$31 | -5.2%
Office Supplies	$23 | +3.1%
Home Décor	$20 | +6.4%

Technology
$156 | +0.4%

Consumer Electronics	$156 | +0.4%

Fashion
$369 | +1.4%

Apparel	$242 | +0.9%
Footwear	$90 | +1.2%
Accessories	$37 | +5.4%

Tobacco & Nicotine
$83 | +0.4%

Tobacco & Nicotine	$83 | +0.4%

Complete Beauty & Health
$274 | +5.5%

Healthcare	$142 | +4.0%
Mass Beauty & Personal Care	$95 | +8.0%
Prestige Beauty	$37 | +5.3%

Auto Aftermarket/Tires
$69 | +4.8%

Automotive Aftermarket/Tires	$69 | +4.8%

Source: Circana, Checkout (accessories, auto aftermarket, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies, small appliances, sports equipment – includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books – MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); ***12ME March 2026 vs. LY***
Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and nonedible CPG, 52WE March 29, 2026); Complete Consumer (pet care, 52WE March 22, 2026)
Foodservice includes commercial and non-commercial foodservice, direct consumer spend

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Annual retail spend reached $3.5T

Up 3.0% compared to the same period last year, led by toys and mass beauty/personal care industries.



12ME Dollar Volume ($B)		Year-over-year Dollar Percent Change
$47	Toys	9.0%
$95	Mass Beauty & Personal Care	8.0%
$20	Home Décor	6.4%
$90	Pet Care	5.4%
$37	Accessories	5.4%
$37	Prestige Beauty	5.3%
$62	Video Games	5.1%
$69	Auto Aftermarket/Tires	4.8%
$121	Home Improvement	4.6%
$142	Healthcare	4.0%
$47	Home Textiles	3.7%
$709	Foodservice	3.6%
$23	Office Supplies	3.1%
$1,080	Retail Food & Beverage	3.1%
$34	Sports EQ/Team Sports	2.4%
$102	Other Consumables	2.0%
$45	Homecare	1.8%
$45	Small Appliances	1.2%
$90	Footwear	1.2%
$242	Apparel	0.9%
$156	Tech	0.4%
$83	Tobacco & Nicotine	0.4%
$15	Books	-0.6%
$32	Housewares	-1.0%
$10	Juvenile	-1.2%
$6	Cycling	-3.0%
$31	Furniture	-5.2%

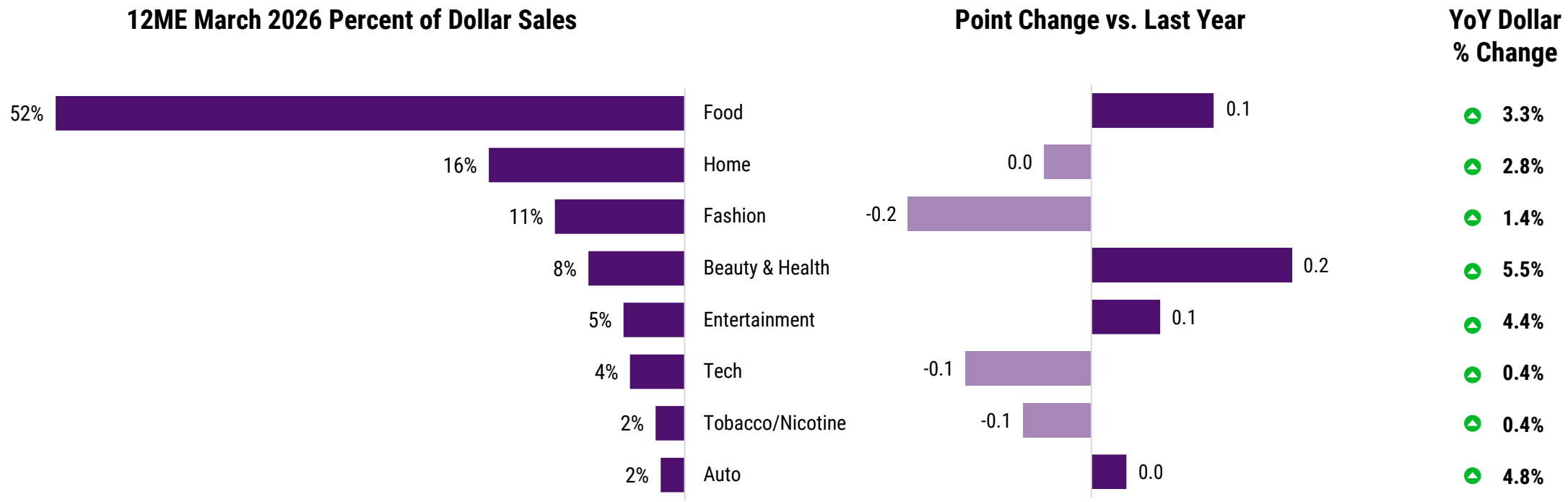
TOTAL DOLLARS
$3.5T

+3.0%
vs. LY

Source: Circana, Checkout (accessories, auto aftermarket, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies, small appliances, sports equipment – includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books – MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); ***12ME March 2026 vs. LY*** *Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and nonedible CPG, 52WE March 29, 2026); Complete Consumer (pet care, 52WE March 22, 2026) Foodservice includes commercial and non-commercial foodservice, direct consumer spend*

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Beauty & health and food segments gained the most share at the expense of fashion



Source: Circana, Checkout (accessories, auto aftermarket, consumer electronics, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies, small appliances, sports equipment – includes team sports, toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (auto tires, cycling, prestige beauty); BookScan™ (books – MSRP sales); Market Dynamics Report (video games); CREST® (foodservice); ***12ME March 2026 vs. LY*** *Total Market View MULO+ with Conv & Perimeter and EMI 3P (F&B and nonedible CPG, 52WE March 29, 2026); Complete Consumer (pet care, 52WE March 22, 2026) Foodservice includes commercial and non-commercial foodservice, direct consumer spend*

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Forces shaping consumer behavior in early 2026

HEADWINDS



Inflation rate soars

March 2026's Consumer Price Index increased 3.3%, up from 2.4% in February, fueled by a 21% spike in gasoline[1].



Income strain and debt

Total household debt hit $18.8T in Q4 2025. Credit card balances grew 5% year-over-year, reaching a record $1.3T[2].



Slowing job market

Revised data show the U.S. added only ~181K jobs in all of 2025, a dramatic slowdown versus 2024. As of March 2026, the unemployment rate remains at 4.3%[1].



Record low sentiment

As of early April, CivicScience Economic Sentiment index dropped to its lowest point since the index began in 2013[3].

TAILWINDS



Higher tax refunds

As of April 10, IRS data shows that the total amount refunded was $265B, up 16% vs. the same point last year.



Digital & e-commerce

E-commerce and social commerce continue to grow, with social-driven platforms (e.g., creator-led commerce) becoming a mainstream purchase path.



Lifestyle priorities

With over 65% of consumers committing to exercise and healthy eating[4], wellness has become routine, alongside the growing impact of GLP-1 usage.



Desire for innovation

New and innovative products drive consumer spending and inspire continued manufacturer innovation.

[1]Source: U.S. Bureau of Labor Statistics;
[2]Source: Federal Reserve Bank of New York
[3]Source: CivicScience Economic Sentiment Index
[4]Source: Circana, Omnibus, January 2026

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Latest U.S. economy stats



Economic Growth

+0.5%

Q4 2025 (3rd estimate)



Inflation

+3.3%

March 2026*



Retail Sales

+4.0%

March 2026*



Avg. Price per Gallon of Gas

$4.26

April 2026

Up 30.1% from a year ago



Population

348.3M

March 2026

+0.5% annual growth



Unemployment Rate

4.3%

March 2026

Down from 4.4% in February, which was the highest rate since September 2021

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Compared with previous year
Source: U.S. Census Bureau

Q1 Industry and Category Performance



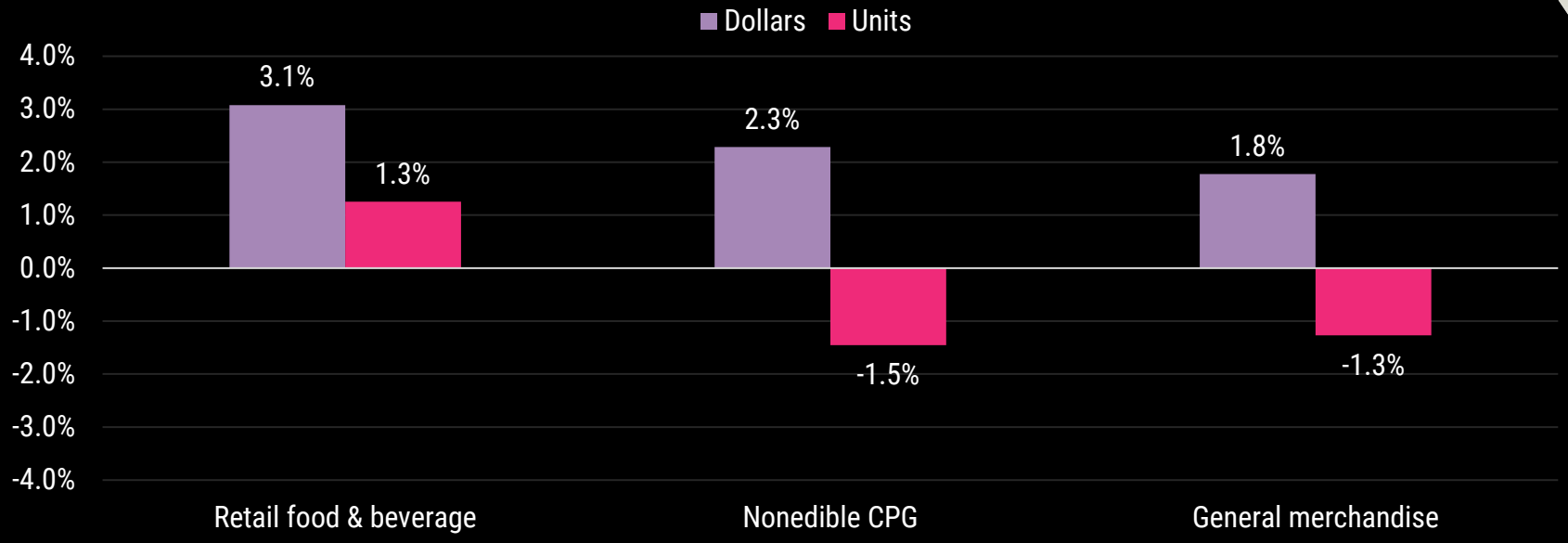
Note: Year-to-date sales are impacted by the Easter timing shift (Q1 this year vs. Q2 last year).

Q1 2026 demand performance highlights that consumers continue to prioritize essentials over discretionary

This sets an important baseline as we move further into 2026.



13 Weeks Ending April 4, 2026
Year-over-year % Change by Retail Segment

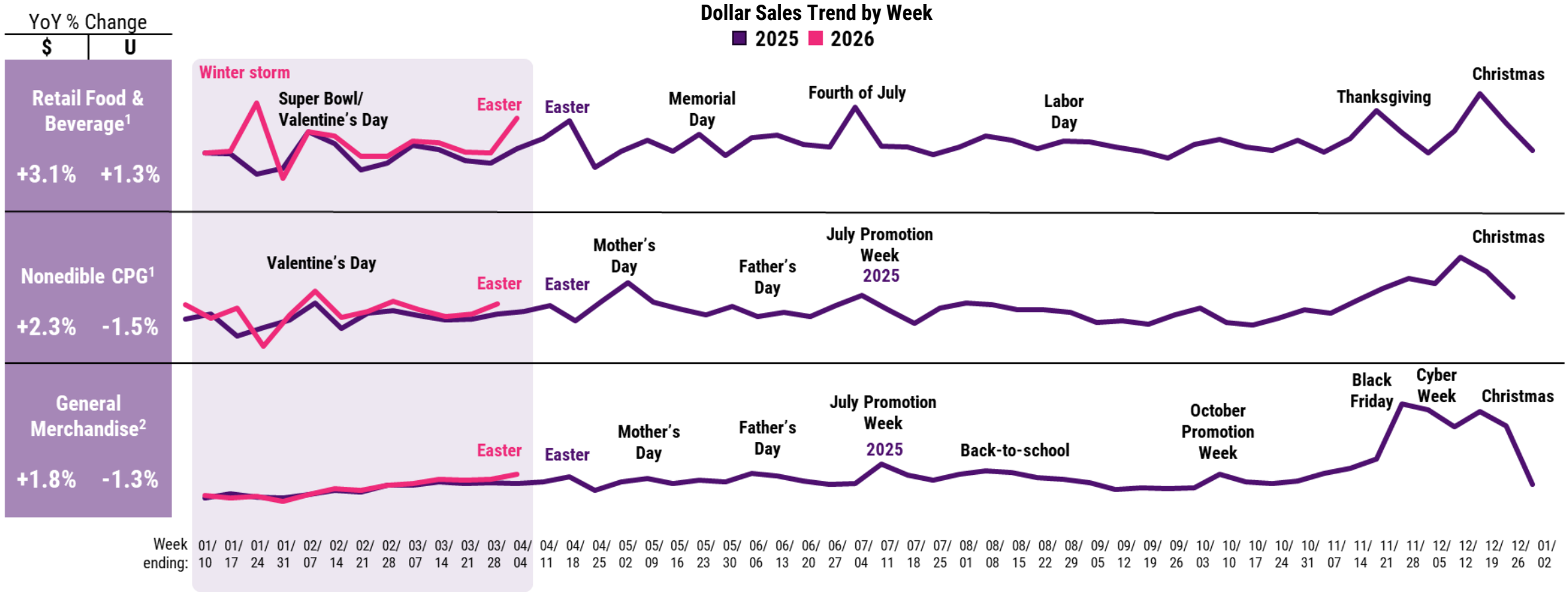


Note: Year-to-date sales are impacted by the Easter timing shift (Q1 this year vs. Q2 last year).

Sources: Circana, Total Market View, MULO+ Convenience and Perimeter (F&B/nonedible CPG – excluding tobacco) – week ends on a Sunday; Circana, Retail Early Indicator (general merchandise)

Discretionary sales underperformed to CPG

Total retail Q1 results were heavily impacted by January winter storms and the shift of Easter into Q1 this year, alongside other headwinds and tailwinds, making true Q1 and early spring performance difficult to interpret.

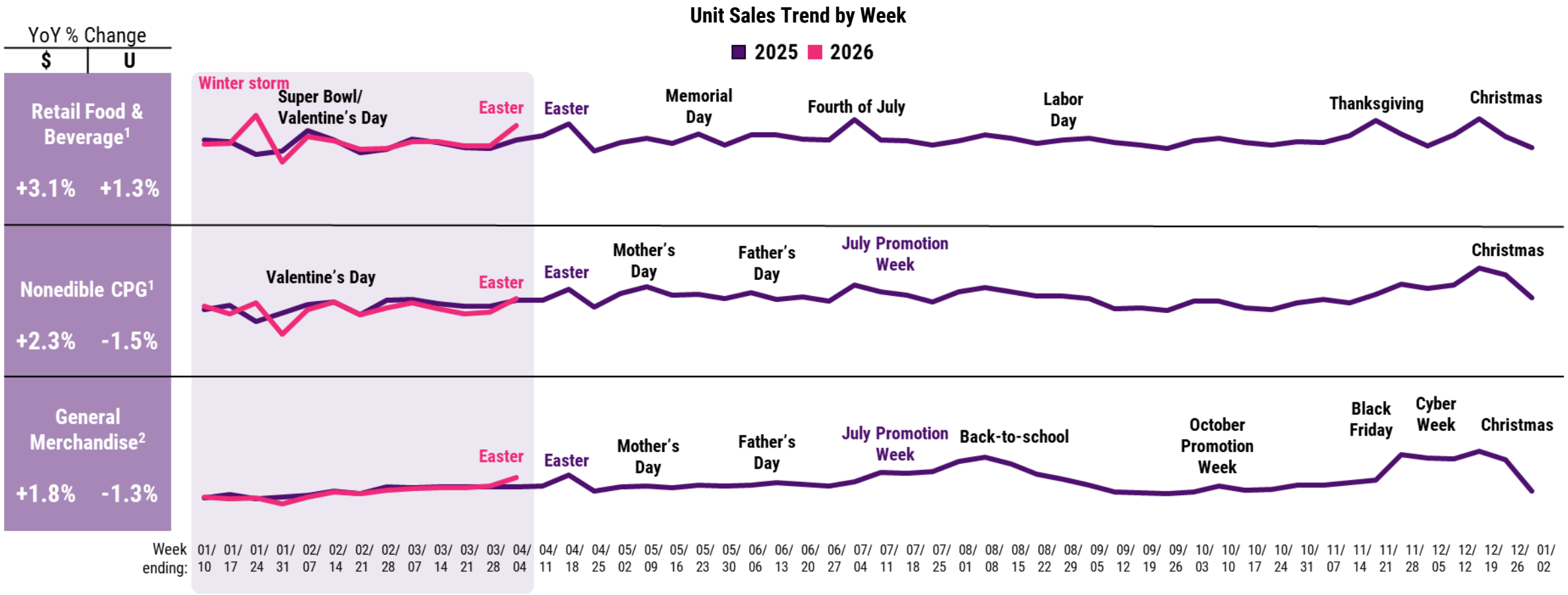


Note: Year-to-date sales are impacted by the Easter timing shift (Q1 this year vs. Q2 last year).

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)

Steeper declines in non-food **demand**



Note: Year-to-date sales are impacted by the Easter timing shift (Q1 this year vs. Q2 last year).

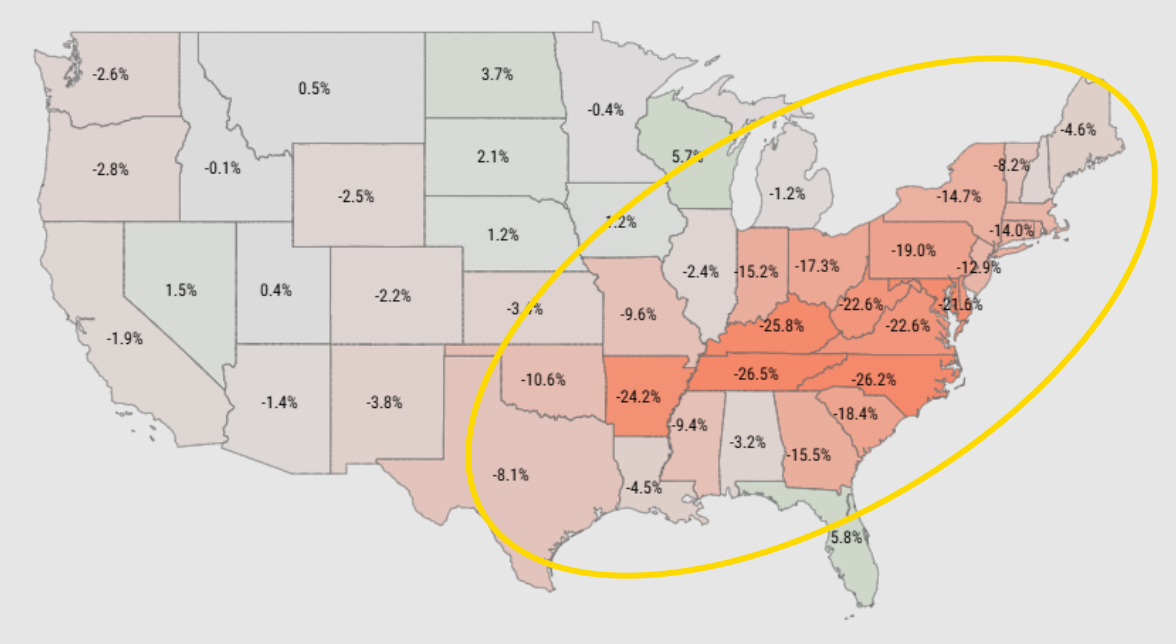
Axes on charts are not related; week-end dates based on 2026.
Sources: [1]Circana, Total Market View, MULO+ Convenience and Perimeter (F&B/nonedible CPG – excluding tobacco) – week ends on a Sunday;
[2]Circana, point-of-sale, first-read data, limited release (general merchandise)

Winter weather causes regional volatility in general merchandise brick & mortar sales

Brick & Mortar General Merchandise Dollar % Change vs. Prior Year

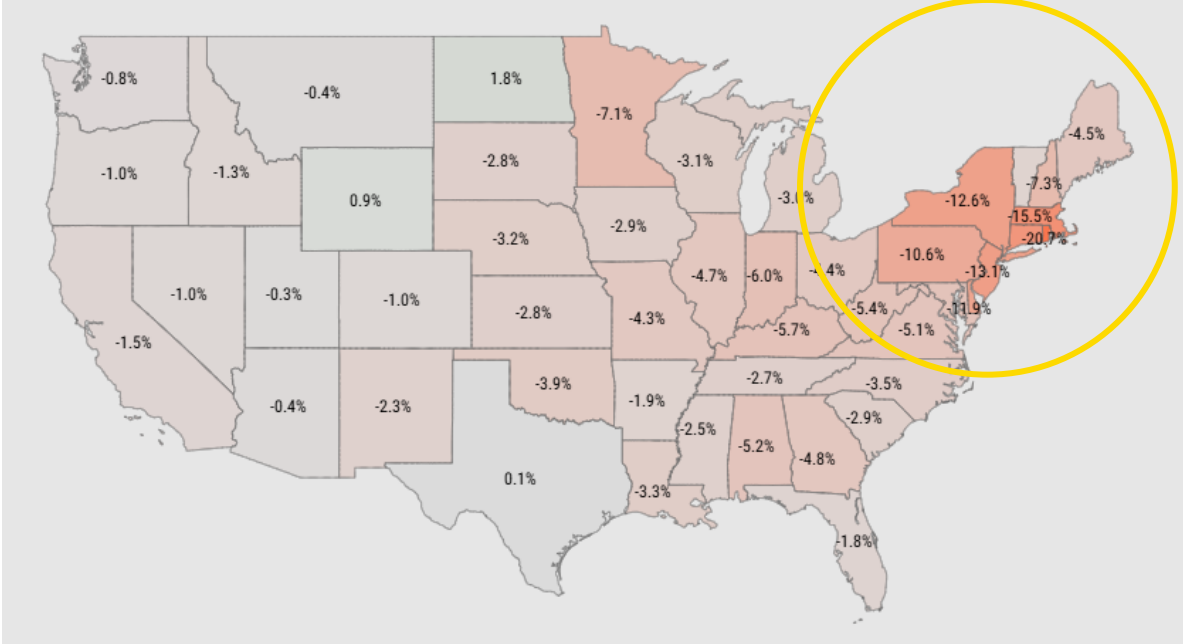
1 Week Ending January 31, 2026

During January 23–27, a major winter storm brought snow, freezing rain, and dangerous cold to more than 240 million Americans.



1 Week Ending February 28, 2026

On February 22–23, a historic blizzard impacted the Northeast, dropping more than two feet of snow in some areas and prompting states of emergency and travel bans.

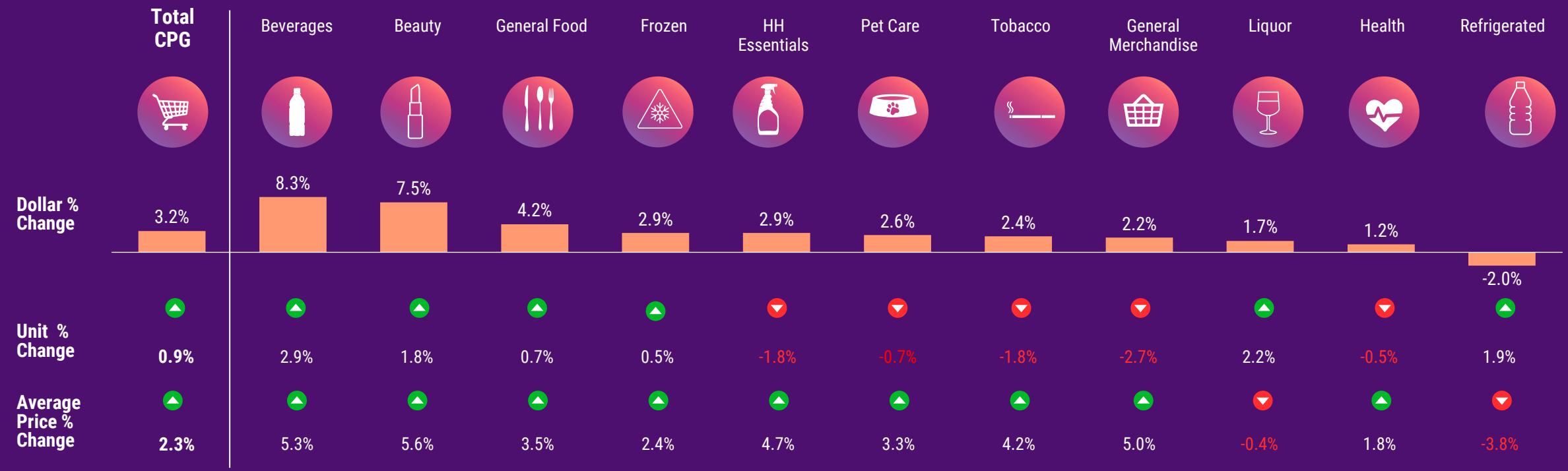


*Source: Circana, point-of-sale, first-read data, limited release , **brick & mortar only** (general merchandise)*

In CPG, the beverage and beauty departments outpaced total CPG growth

Growth is inflated by the Easter shift, but beverages and beauty remain as standout segments. Refrigerated declines stem from difficult comparisons to last year's bird flu–inflated egg prices.

CPG Department Performance, 13 Weeks Ending April 5, 2026



Note Year-to-date sales are impacted by the Easter timing shift (Q1 this year vs. Q2 last year).

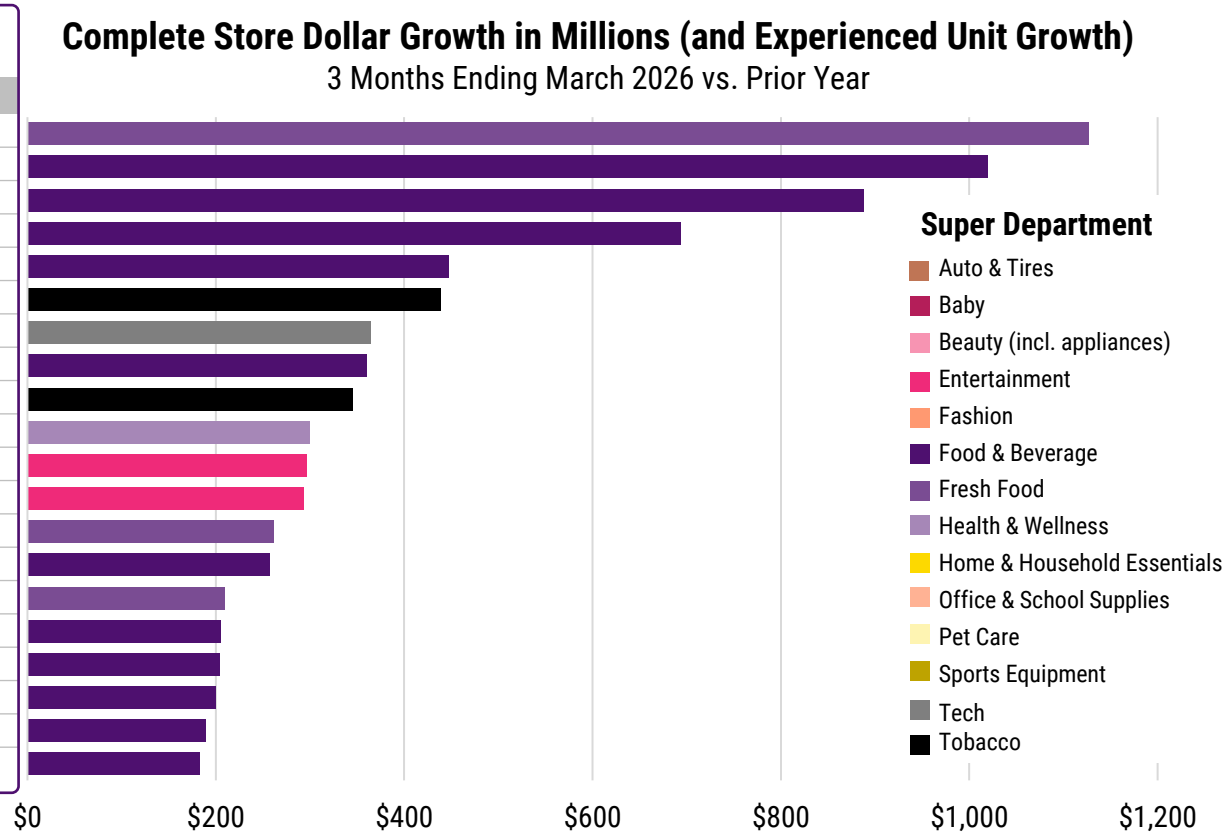
Source: Circana, OmniMarket™ Total Store View, MULO+ with Conv, 13WE April 5, 2026 vs. YA, ASP reflects average price per unit

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Retail's top growth categories highlight where consumers allocate spend

Easter timing impacted Q1 top growth categories, such as candy. PCs emerged among top growth categories supported by new releases from Apple, including its new budget-friendly MacBook Neo.

	% Change vs. Prior Year	
	$	U
Beef	10%	3%
Energy Drinks	17%	14%
Chocolate Candy	15%	3%
Carbonated Beverages	6%	0%
Non-chocolate Candy	14%	10%
Bottled Water	6%	2%
Total PCs	8%	10%
Yogurt	11%	3%
Smokeless Tobacco	11%	8%
Weight Control	9%	11%
Video Games Hardware	38%	22%
Strategic Trade Card Games	53%	32%
Fresh Common Fruit	3%	2%
Salty Snacks	2%	2%
Chicken	4%	3%
Premixed Cocktails/Coolers/Hard Seltzers	16%	16%
Dried Meat Snacks	14%	1%
Snack Bars/Granola Bars	7%	4%
Sports Drinks	8%	4%
Baking Needs	14%	6%





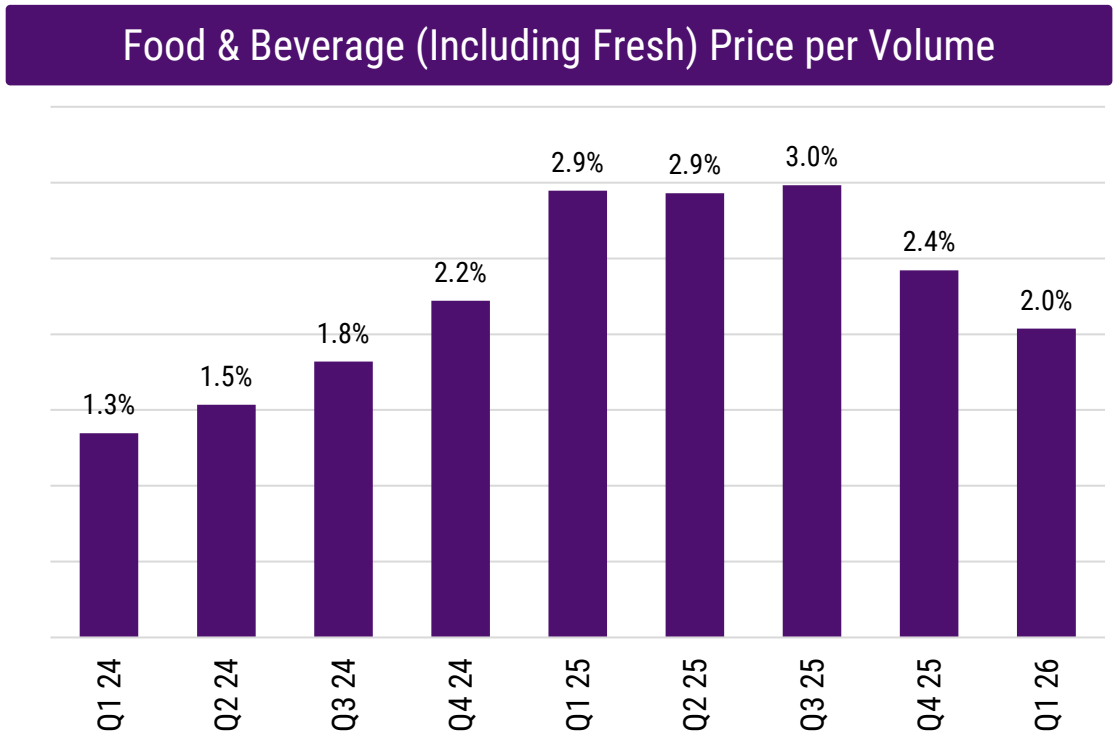
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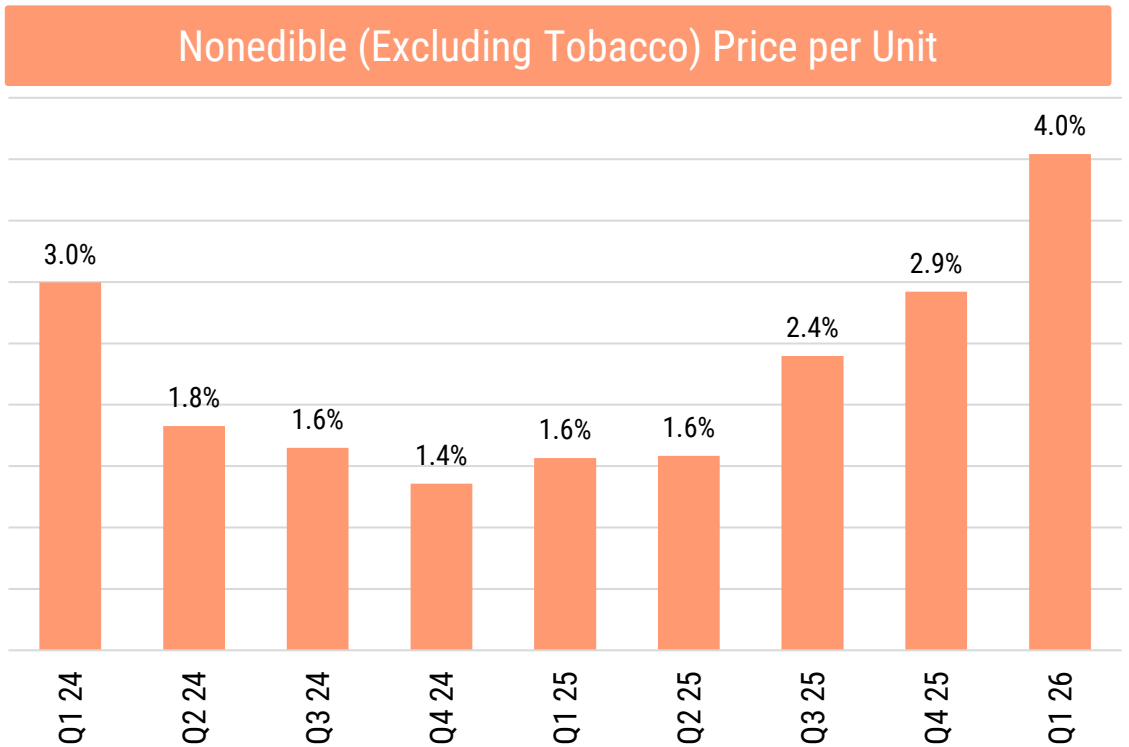
Source: Circana, Complete Store, thought leadership hierarchy (note that book sales reported in units only)
*Top growth based on absolute dollar change vs. last year **and positive unit growth** vs. last year.*

Price growth trends in CPG

As of Q1 2026, food and beverage price per volume increased 2.0%, a slowdown from Q4.
Nonedible price per unit increased 4.0%.

CPG Quarterly Price % Chg. vs. Prior Year



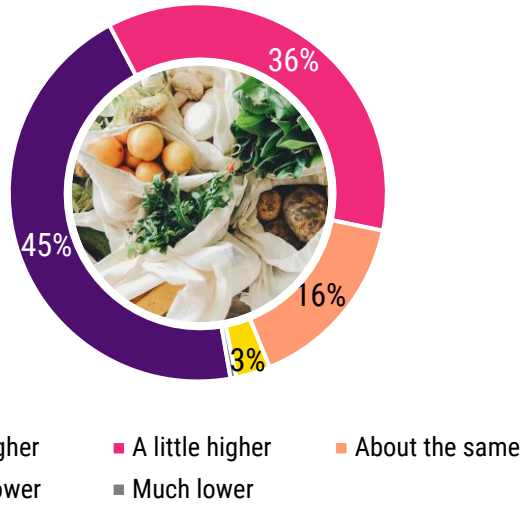


Source: Circana, POS data MULO+ with Conv., data ending March 29, 2026
Note: Dollar-weighted average price per volume % chg. across categories

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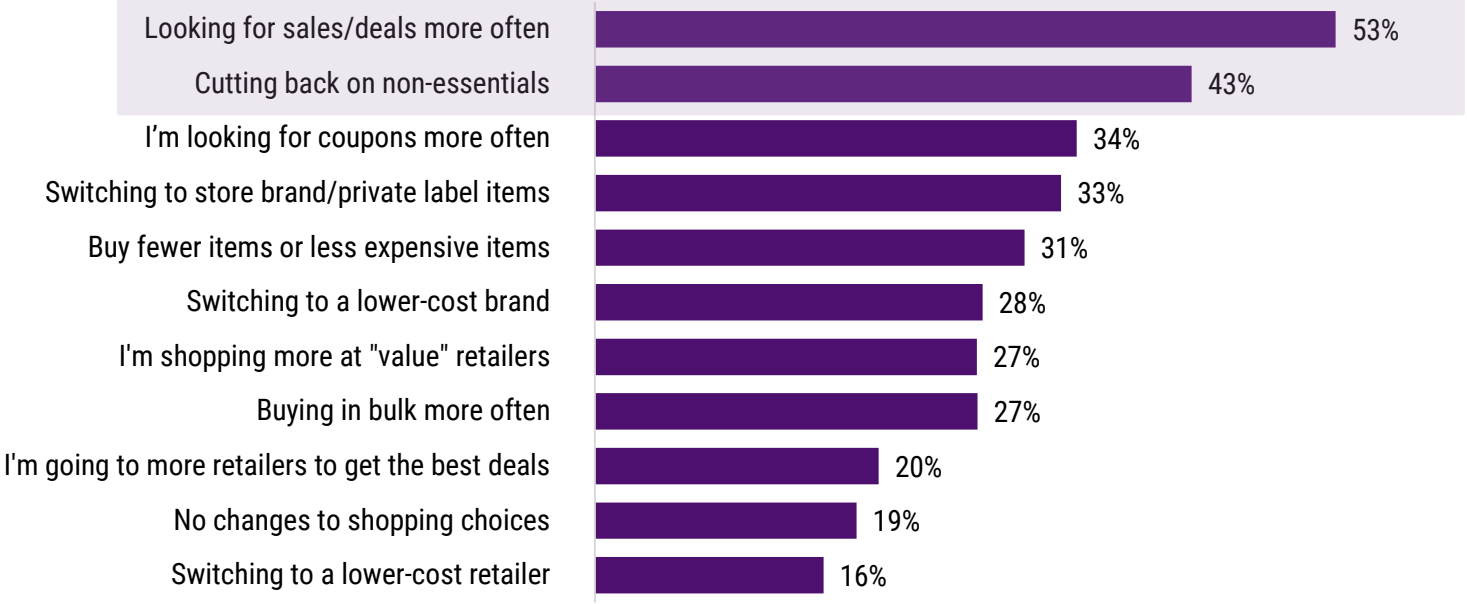
To combat higher prices, consumers are looking for deals or are cutting back on non-essentials

What is your perception of the cost of groceries and everyday household items now, compared to last year?[1]



About 80% perceive cost of groceries/everyday household items to be higher.

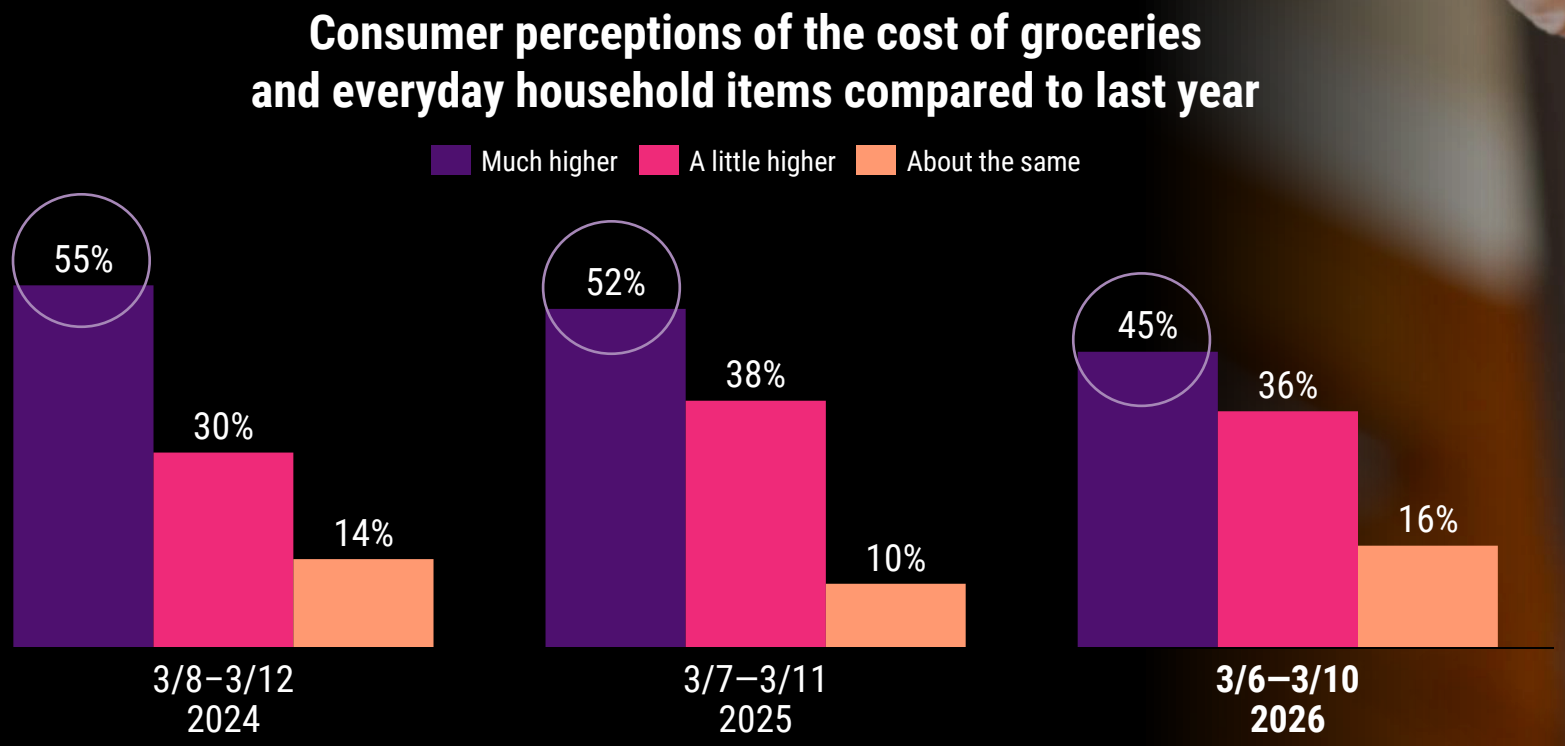
Have you changed your shopping choices recently due to increased grocery prices?[2]



Source: Circana, Shopper Survey, March 2026
Q: What is your perception of the cost of groceries and everyday household items now, compared to last year? Base: total respondents, 1,042
Q. Have you changed your shopping choices recently due to increased grocery prices? Base: Those who have noticed higher prices on groceries and everyday HH items versus last year, 844

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Fewer shoppers perceive grocery prices to be much higher in 2026



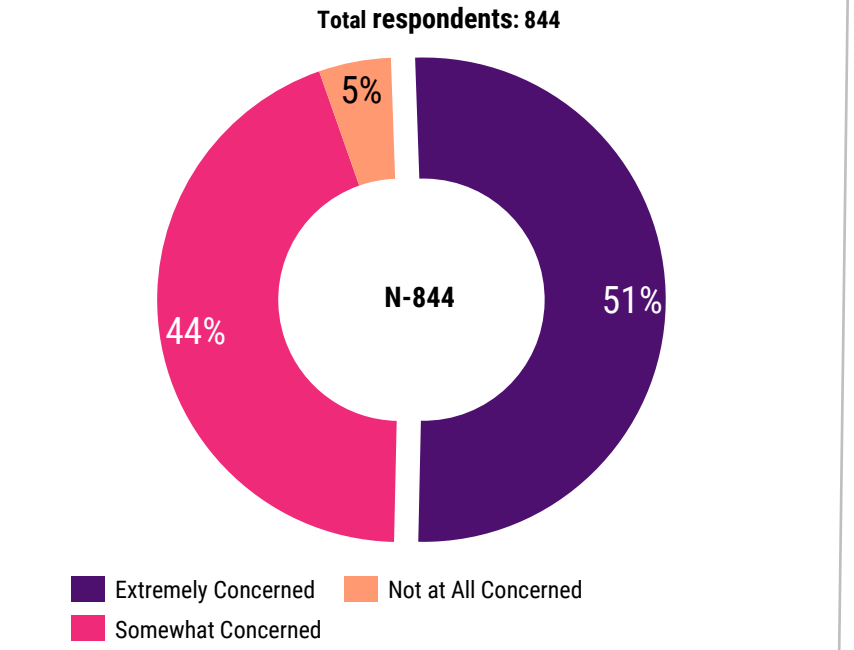
Source: Circana OmniConsumer Shopper Survey, March 2026. Responses to perceptions of the cost of groceries and everyday household items compared to last year; totals might not be 100 due to rounding

Food cost inflation is a major consumer concern

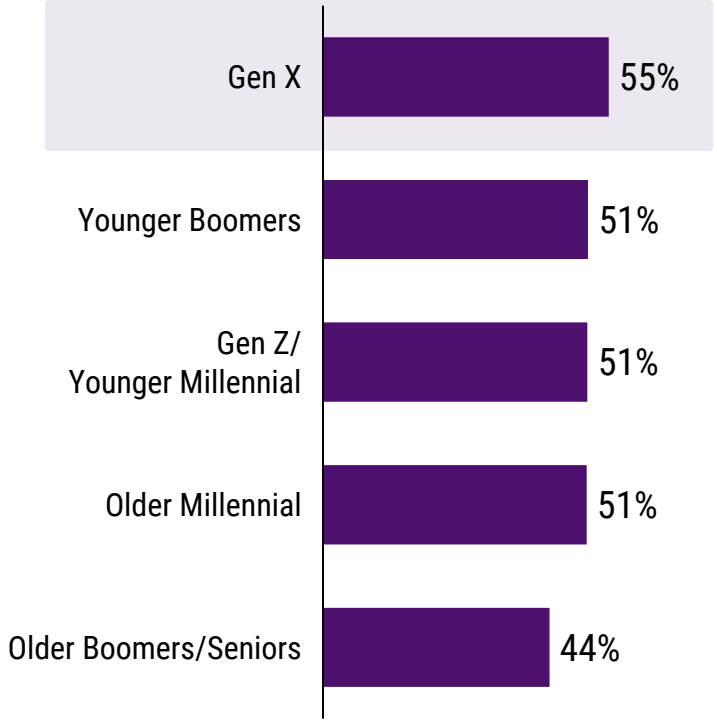
About 50% of U.S. consumers are extremely concerned about rising food prices.
“Extreme concern” over-indexes among Gen X and middle- to lower-income households.

Thinking about your own household, how concerned are you about food cost inflation?

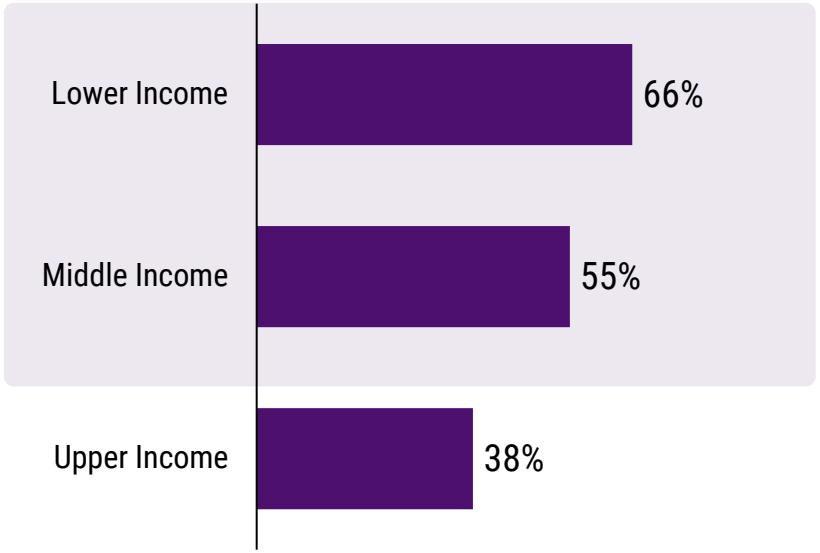
Total U.S.



Based on Generation
Extremely Concerned



Based on HH Income Level
Extremely Concerned



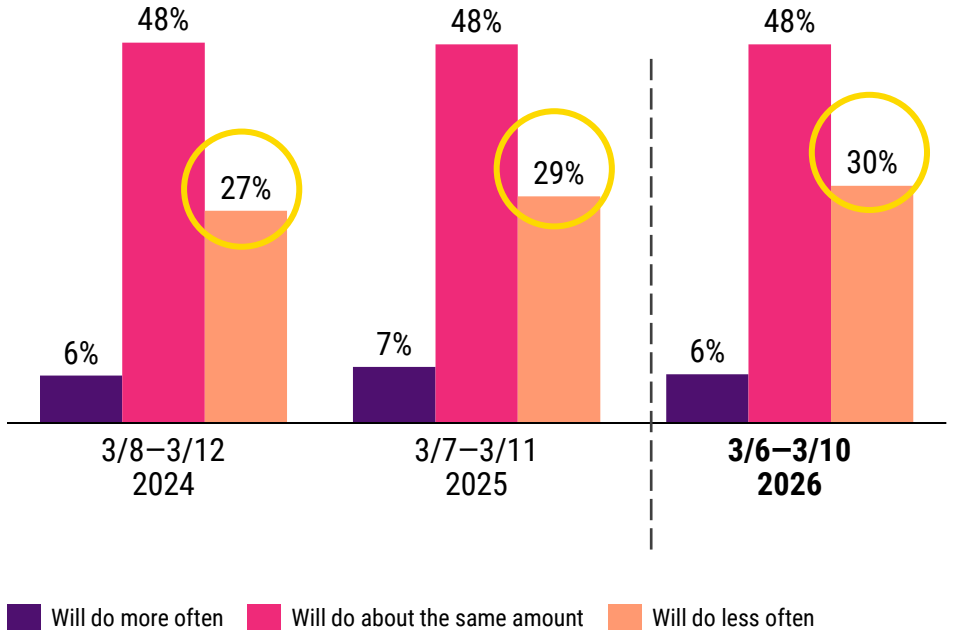
Source: Circana, Survey Solutions, March 2026, total U.S. primary grocery shoppers

Inflation is a deterrent to foodservice visits

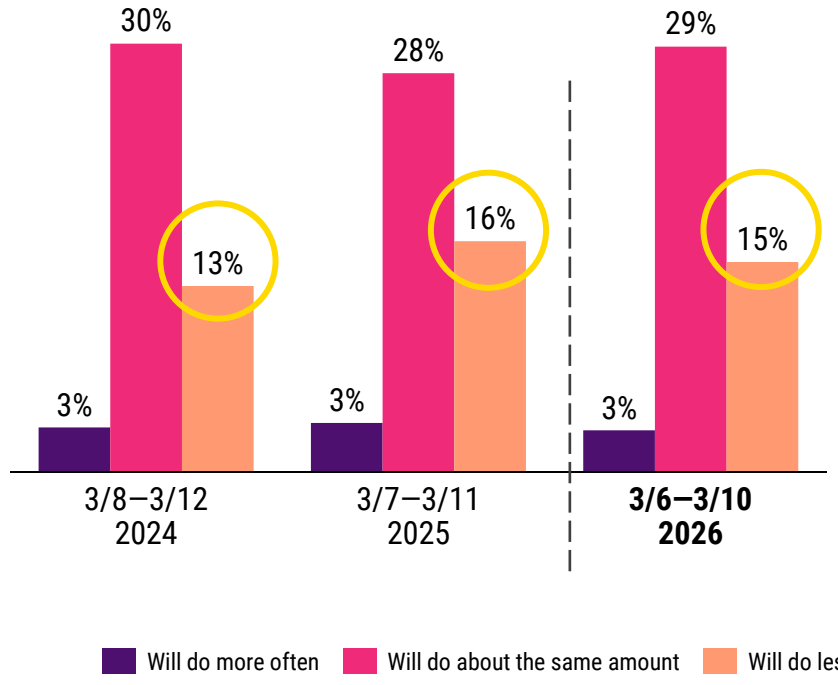
Consumers who stated they will dine out and go to a coffee shop **less often** have increased over the past 2 years.

What are your plans for each of the following in the next 4 weeks, compared to what you were doing the past 4 weeks?

Dine out at restaurants



Go to a coffee shop



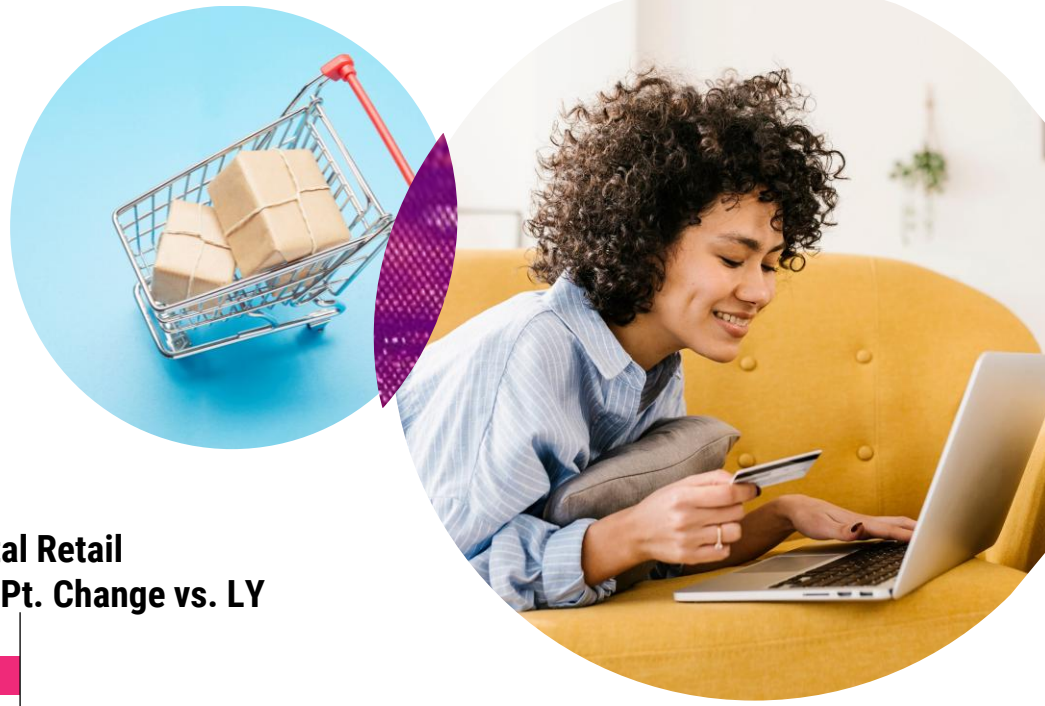
Source: Circana, OmniConsumer Shopper Survey, March 2026, not displaying "does not apply"

Channel and E-commerce Performance

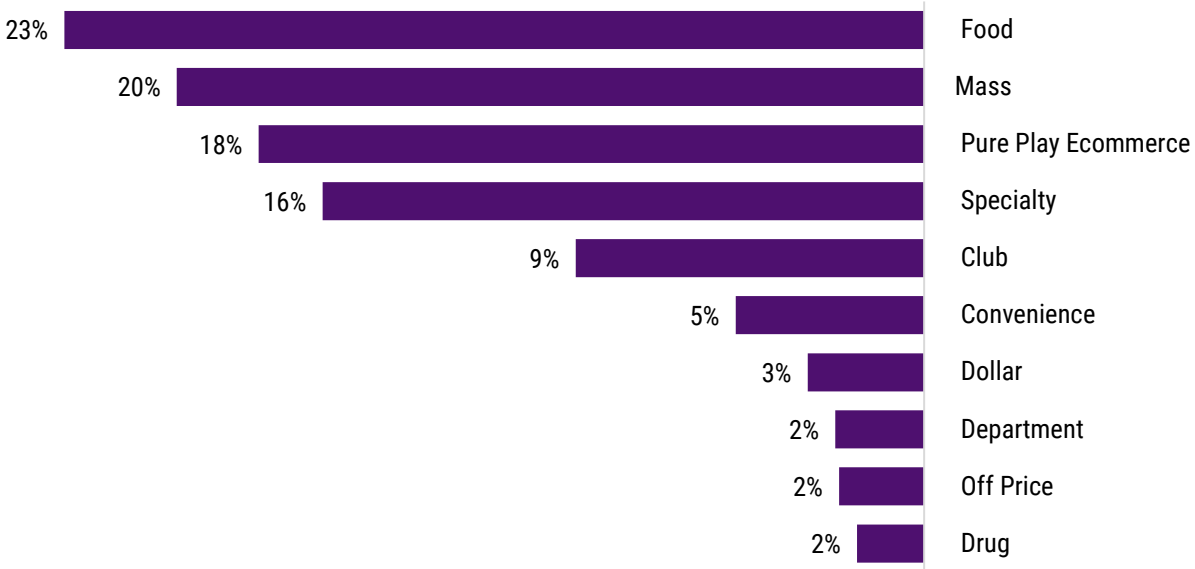


Consumers choose where to shop to as a part of their purchase journey

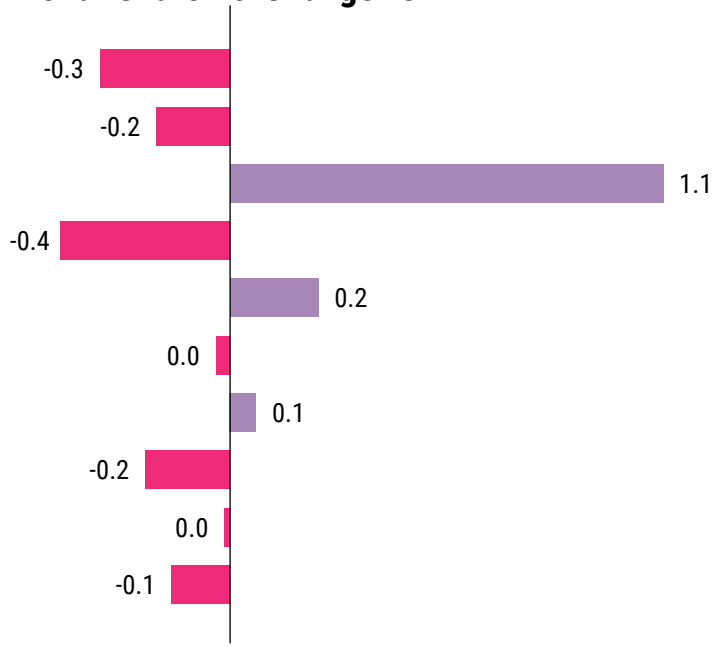
In the latest 52 weeks, dollars have shifted most toward e-commerce and club stores. Club is largely driven by gains in CPG, while e-comm was a top share gainer across CPG and discretionary.



Total Retail Dollar Share
52 Weeks Ending March 22, 2026



Total Retail
Dollar Share Pt. Change vs. LY

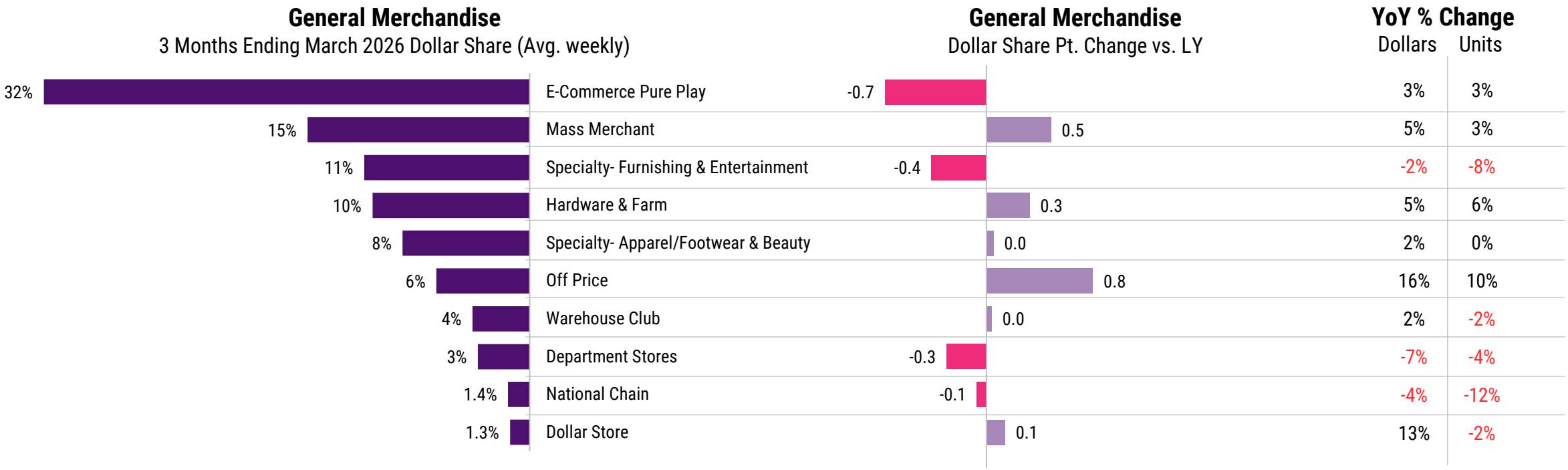


Source: Circana, Complete Wallet®, 52WE March 22, 2026 vs. prior year
Total retail includes food & beverage CPG, nonedible CPG (excl. tobacco), and general merchandise

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In Q1, general merchandise dollars shifted most toward off price and mass

Q1 channel share shifts may be impacted by early-in-the-year severe winter weather and the shift of Easter into March this year vs. April last year.



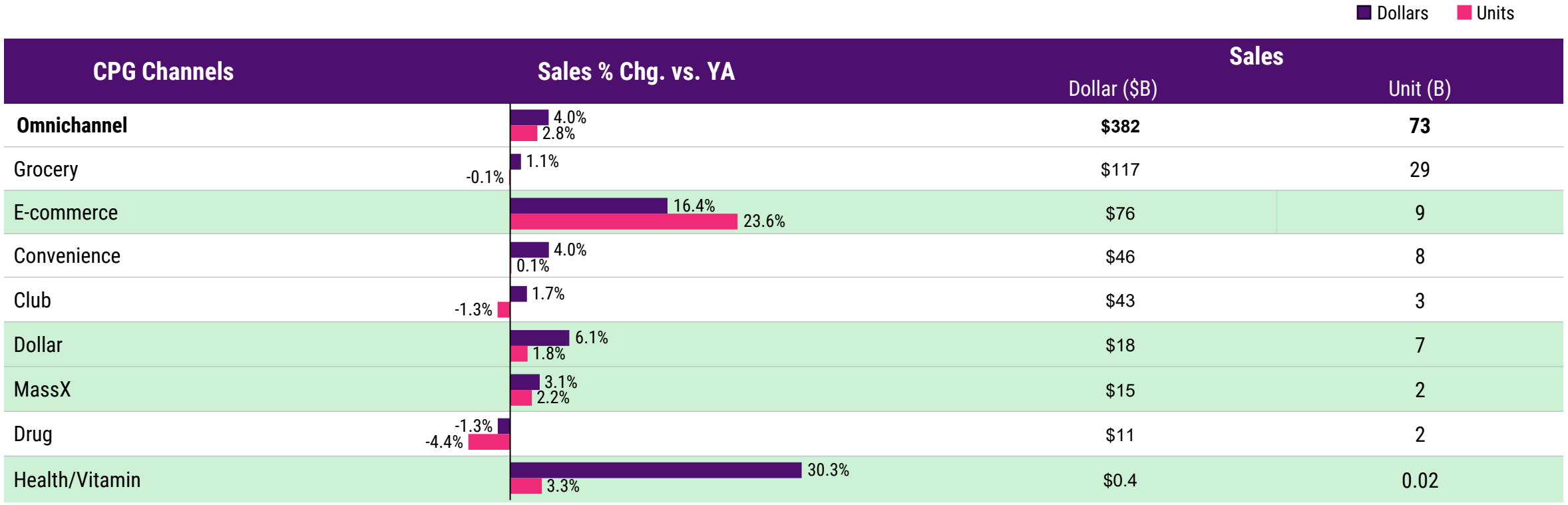
Source: Circana, Checkout
Industries include: Accessories, apparel, auto products, footwear, furniture, home décor, home improvement, home textiles, housewares, juvenile, office supplies, sports eq/team sports, prestige beauty, small appliances, technology, toys, video games
**Excluding grocery/drug, convenience/gas, restaurant channels; not displaying "all other" channels*

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In CPG, e-commerce, dollar, mass X, and health/vitamin channels saw year-over-year gains in dollar and unit sales

Q1 channel trends could also be impacted by severe weather that swept across the country in late January and February.

CPG Channel Performance, 13 Weeks Ending April 5, 2026



CPG Channels	Sales % Chg. vs. YA	Sales	
		Dollar ($B)	Unit (B)
Omnichannel	4.0% / 2.8%	**$382**	**73**
Grocery	1.1% / -0.1%	$117	29
E-commerce	16.4% / 23.6%	$76	9
Convenience	4.0% / 0.1%	$46	8
Club	1.7% / -1.3%	$43	3
Dollar	6.1% / 1.8%	$18	7
MassX	3.1% / 2.2%	$15	2
Drug	-1.3% / -4.4%	$11	2
Health/Vitamin	30.3% / 3.3%	$0.4	0.02

Source: Circana, OmniConsumer™ Receipt Panel, 13WE April 5, 2026 vs. YA, NBD aligned

CPG trips to club, dollar, and drug channels increased versus a year ago, while trips to grocery channel declined

Q1 channel trends could also be impacted by severe weather that swept across the country in late January and February.

Total CPG: Trips by Channel

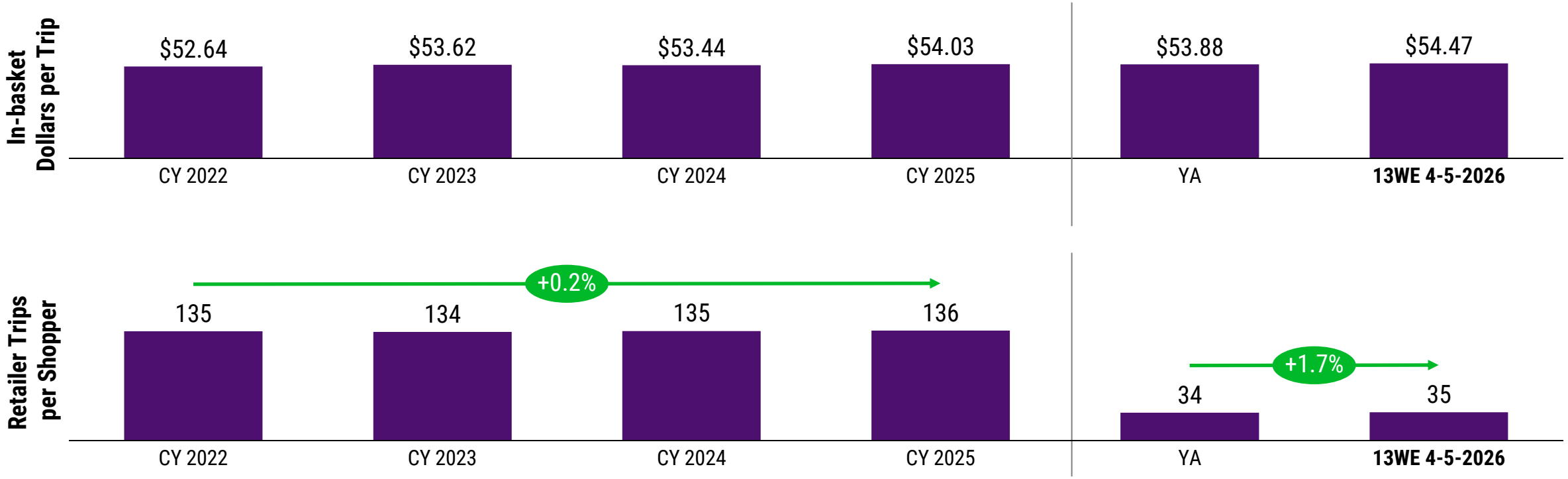
Channels	Retailer Trips per Shopper	% Chg. vs. YA
Grocery	33.1	-1.6
Club	8.0	1.6
Drug	9.7	14.3
MassX	7.9	1.4
Dollar	14.5	3.5
Health/Vitamin	2.5	17.1

Note: Walmart is not included in grocery or mass/super.
Source: Circana, OmniConsumer™ Receipt Panel, 13WE April 5, 2026 vs. YA, NBD aligned

CPG basket size and shopping trips show growth in 2026 vs. year ago

Total CPG: Basket Size and Trip Size

CY 2022–CY 2025 and 13 Weeks Ending April 5, 2026



Source: Circana, OmniConsumer™ scan panel, all outlets, CY 2022–CY 2025, 13WE April 5, 2026 vs. YA, NBD aligned

Rise of the omnichannel shopper

4% Exclusively will use online shopping for grocery in the coming weeks

35% Will use e-commerce for grocery shopping in the coming weeks

50% Millennials and Gen Z will shop for part of their monthly groceries online in the coming weeks

40% of family households will shop online for groceries

26% of Millennials will shop mostly online for groceries

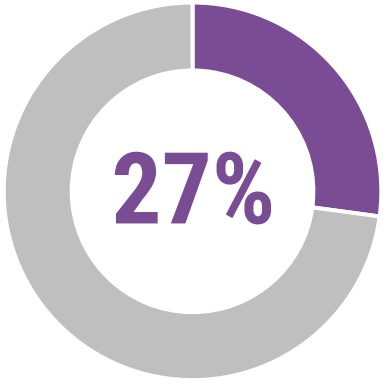


Source: Circana, OmniConsumer™ Shopper Survey, March 2026; Q: During the next 4 weeks, about how much of your grocery shopping do you plan to order online, for either delivery or pickup?

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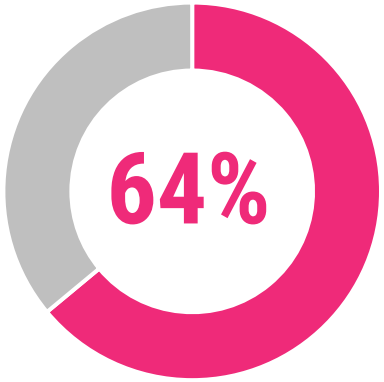
E-commerce accounted for over 25% of total retail annual dollars and about 65% of dollar growth

Total Retail E-commerce
Percent of Dollars



+1.3pts vs. prior year

Total Retail E-commerce
Percent of Dollar Growth



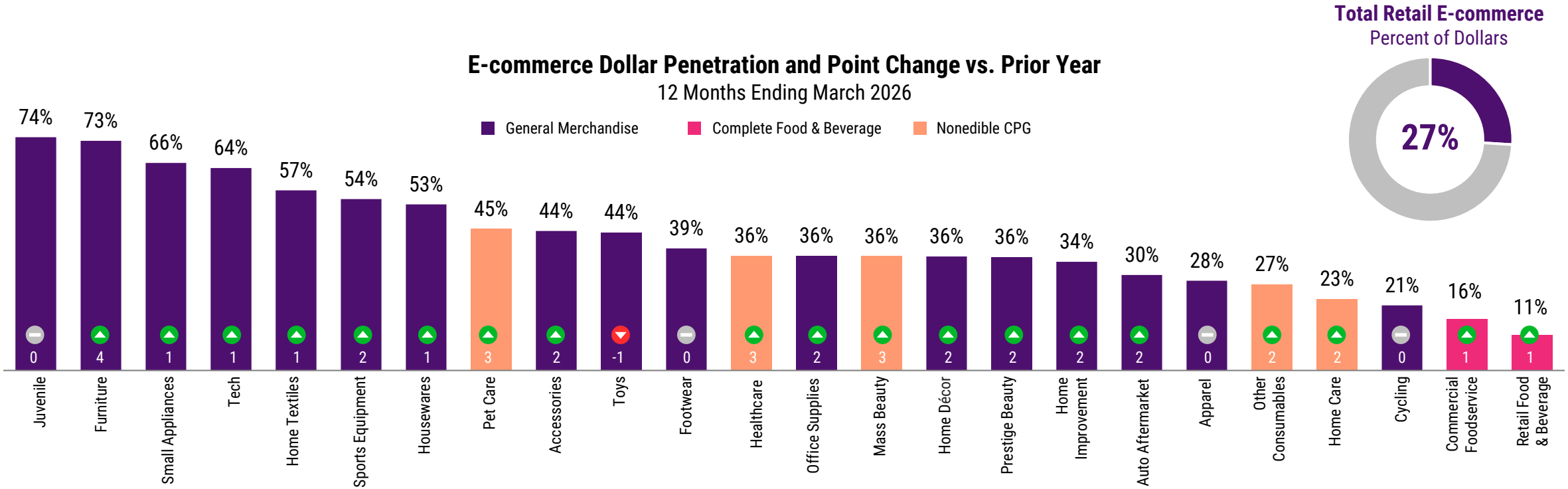


Source: Circana, Checkout (accessories, auto aftermarket [not incl. tires], consumer electronics, furniture, home decor, home improvement, home textiles, housewares, juvenile, office supplies [excludes janitorial/breakroom], small appliances, sports equipment [includes team sports], toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (cycling, prestige beauty); CREST® (foodservice), ***12ME March 2026****; Omnichannel model for F&B) and nonedible (excl. tobacco), Complete Consumer (pet care); 52WE March 22, 2026*

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E-commerce continued share gains across retail

Even in more mature retail industries, e-commerce continued to make gains. Lowest penetration was seen in retail food & beverage, with just 11% of dollars generated online.



Arrows indicate point change compared to last year

Source: Circana, Checkout (accessories, auto aftermarket [not incl. tires], consumer electronics, furniture, home decor, home improvement, home textiles, housewares, juvenile, office supplies [excludes janitorial/breakroom], small appliances, sports equipment [includes team sports], toys); Consumer Tracking Service (apparel, footwear); Retail Tracking Service (cycling, prestige beauty); CREST® (foodservice), ***12ME March 2026****; Omnichannel model for F&B) and nonedible (excl. tobacco), Complete Consumer (pet care); 52WE March 22, 2026*

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Circana can help

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Checkout
boasts an omnipanel of 150,000 actively engaged buyers who provide Circana with receipt-based data from their online and in-store general merchandise purchases. Checkout's longitudinal data illuminates trends in behavior, while buyer analytics capabilities deliver insight into your key customers.

Retail Tracking Service
is Circana's unmatched ability to capture store-level data feeds directly from retailers and reveals 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.

CREST®
is the most comprehensive source for monitoring consumer visits to commercial and non-commercial foodservice locations and for market share tracking across the total foodservice.

Circana BookScan™
is the gold standard in POS tracking for the publishing market. It covers approximately 85% of all the print books sold in the U.S., through direct reporting from all major retailers.

MULO+
is the largest census-based POS coverage of CPG core channels.

Complete Store
provides the most comprehensive POS-based market coverage across CPG and discretionary retail. It provides visibility into sales across 36 departments to identify shifts in consumer demand to enable strategic planning.

Consumer Tracking Service
equips us to present a comprehensive view of consumer behavior and attitudes across all distribution channels and demographics with survey-based data to help our partners monitor their brand or retailer shares and gauge category and market growth.

Retail Early Indicator
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.

Scan Panel
is the best source for understanding consumer behavior below the brand level and across channels calibrated to POS truth.

Circana Survey Solutions
operates at the intersection of what people think and what they do, leveraging verified purchase behaviors and a comprehensive survey portfolio to better explain and anticipate people's choices.

Circana's Complete E-commerce
product leverages the best available data sources, combining point-of-sale and receipts, to deliver unified sales and share intelligence.

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