Winning the Back-to-School Household Reset

How BTS Season Reshapes Spending in Household Care

Analyzing household strategies for back-to-school season

NielsenIQ

Back-to-school is not just a seasonal shopping event. It is the moment when households reset how their homes operate, shifting from the flexibility of summer to more structured routines. This reset drives a meaningful increase in demand for household care, making BTS one of the most important inflection points of the year for the household care category.

This year, that reset is happening under greater constraint. Consumers are approaching BTS with increased caution, prioritizing essentials, seeking value, and actively looking for ways to make their spending more efficient. Success in this environment requires delivering against a redefined value equation centered on cost-effectiveness, utility, and necessity rather than indulgence.

At the same time, where shoppers spend is changing. Growth is consolidating toward value-oriented retailers such as Walmart and Costco, while digital channels continue to gain share. These shifts are reshaping how and where household care wins during BTS, raising the importance of availability, pricing strategy, and omnichannel execution.

The competitive landscape is also evolving. Newer brands are gaining traction by delivering strong performance while leading with safety and sustainability claims. These entrants are not just taking share, they are expanding baskets by aligning closely with emerging consumer priorities.

Finally, growth during BTS is increasingly uneven. Regional dynamics and weather patterns are having a measurable impact on demand, reinforcing the need for more localized strategies. A one-size-fits-all national approach is less effective in a season where conditions vary significantly market to market.

Winning back-to-school today requires a more precise approach: align to the household reset, lead with value, compete in the right channels, differentiate through meaningful innovation, and execute with local relevance.

“To win BTS, organizations must rethink their approach across five dimensions: **align to the household reset, lead with value, prioritize the right retail and digital channels, invest in differentiated innovation, and execute with local precision.** Those that move beyond broad national strategies and instead activate with focus and agility will be best positioned to capture disproportionate growth during this critical moment.”

Darren Seifer
V.P. Thought Leadership, Home, Family, & Baby

Executive Summary

Back-to-school season is a significant spending moment for household care. This analysis examines the forces shaping BTS 2025:

- **The BTS Opportunity:** Household care product spend per buyer peaked in JAS 2025 while other HFB segments stayed flat.
- **Shopping Behavior:** Consumers shop certain categories more frequently during BTS, with growing online share.
- **Innovation:** Newer brands are winning BTS volume with safety and sustainability claims.
- **Geography & Weather:** Performance varies by region, with weather patterns driving measurable shifts.
- **Promotions:** Promotional intensity is rising, but lift varies widely across categories.

Recommended Next Steps

For Manufacturers

- **Optimize BTS trade spend** by reallocating promotional dollars toward categories where lift remains strong and away from those showing diminishing returns.
- **Invest in online channel presence** given the accelerating shift to digital during BTS. Ensure product content and availability are optimized for e-commerce search.
- **Lead with on-trend claims** in new product launches. Safety, sustainability, and high performance are the attributes winning share among newer BTS brands.
- **Start with the value proposition** since consumers are increasingly finding ways to make their spend more efficient.
- **Tailor regional strategies** to capitalize on growth pockets and weather-driven demand. Deploy marketing and inventory where conditions favor household care.

For Retailers

- **Prioritize shelf space** for high-skew household care categories during BTS. Categories with strong seasonal indices deserve expanded facings and end-cap placement.
- **Accelerate online fulfillment** capabilities to capture the growing digital share of household care during BTS. In-stock rates and delivery speed are competitive advantages.
- **Stock and promote newer brands** that align with consumer trend preferences. These brands are bringing incremental shoppers to the category and driving basket growth.
- **Adjust regional assortments** based on local performance patterns and weather forecasts. One national planogram may miss pockets of growth or decline.

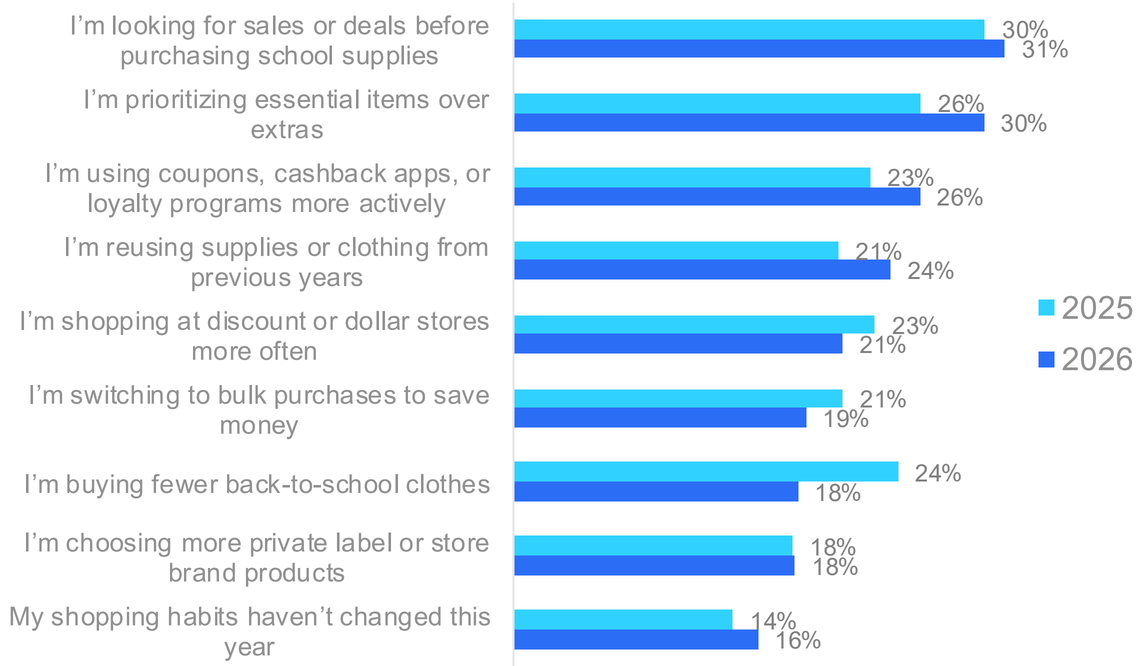
The BTS Opportunity

BTS season drives outsized spending in household care products. While family and baby categories hold steady, household care product spend per buyer surges, making household care the standout segment worth a closer look.

Winning BTS Means Solving for Shopper Efficiency, Not Indulgence

Families are trading extras for essentials, seeking deals, and consolidating spend to stretch budgets

Which of the following best describe how your back-to-school shopping habits have changed this year, if at all?
Households with Kids <18

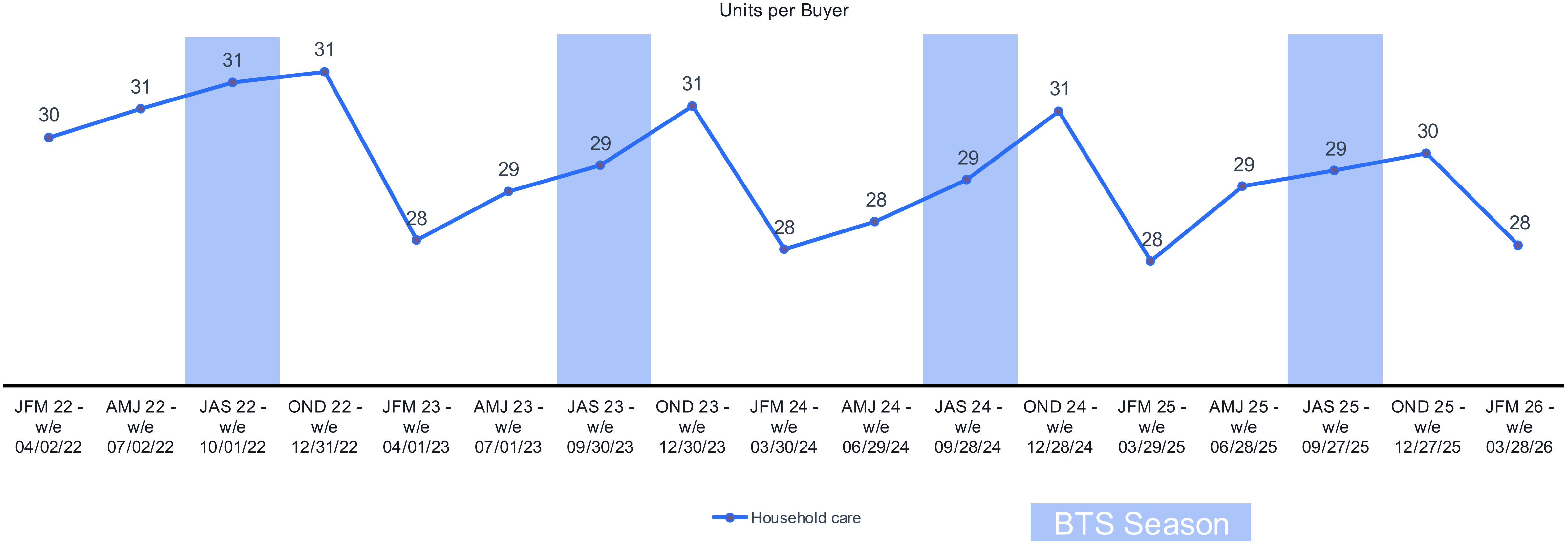


Source: NielsenIQ, 2025 survey fielded Sept. n=344, 2026 survey fielded June n=593

NIQ

The Fall Reset Drives a Predictable Surge You Can Plan to Win

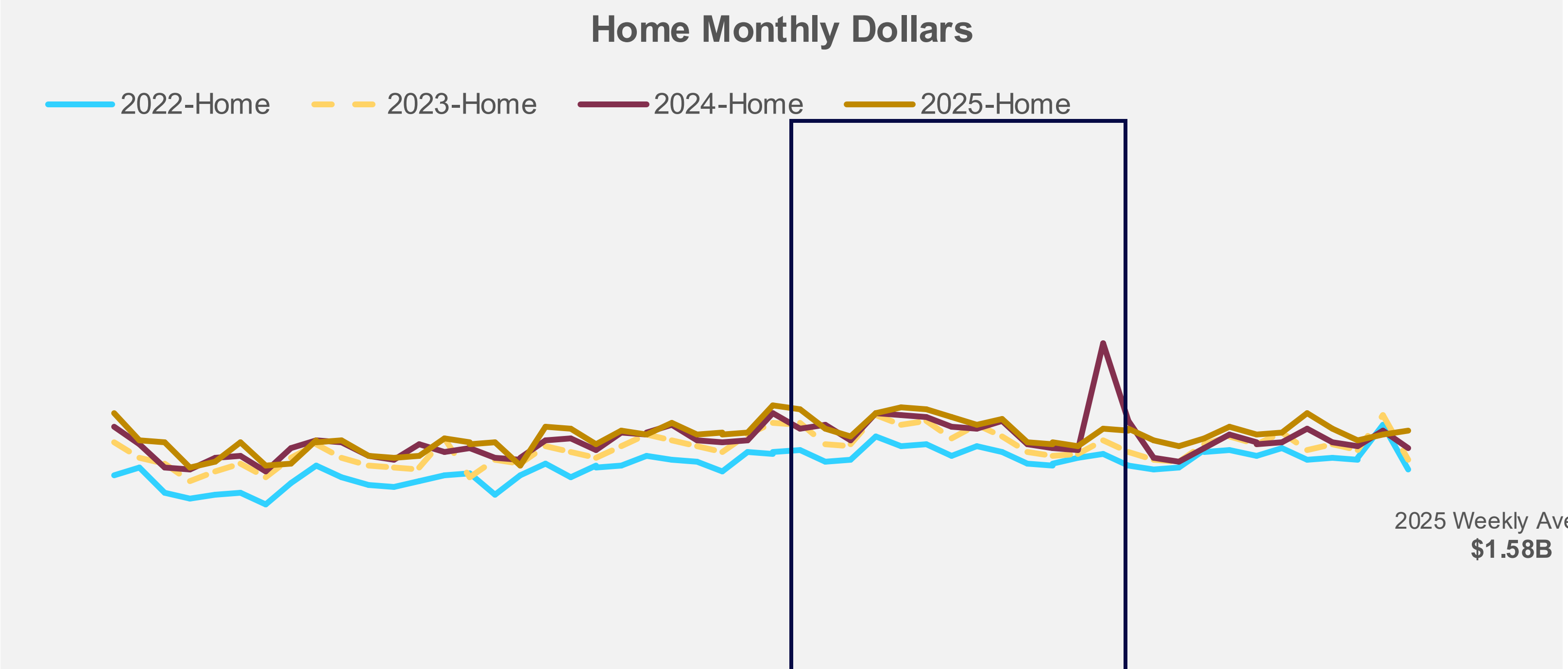
Spend per buyer hits a relative high for household care categories as consumers are resetting from summertime activities and preparing for the holiday season.



Source: NielsenIQ Panel On Demand Omnishopper | US Exp Osh - NDH Synd Full View

Routine Rebuilds Power One of the Largest Spending Moments of the Year

Align merchandising and messaging to routine rebuild, not just school prep.



2025 Weekly Average:
$1.58B

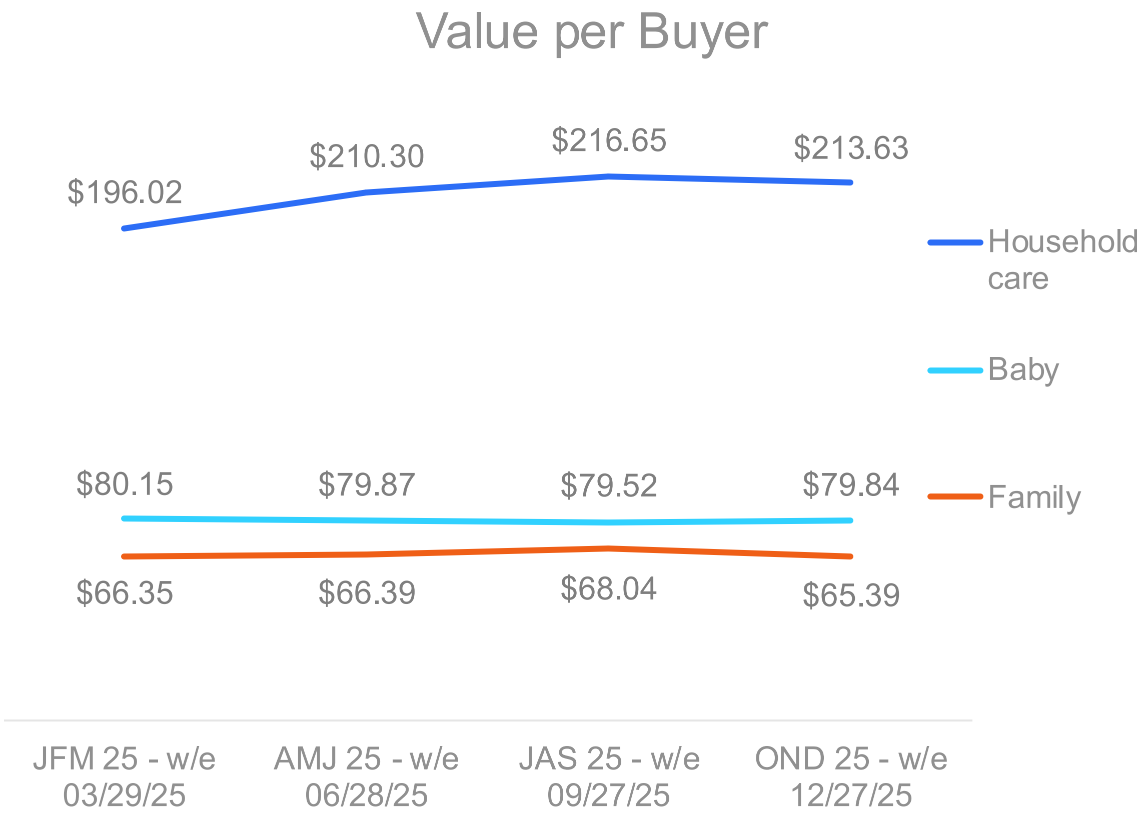
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2025 Weekly Avg ($MM)	1.56	1.48	1.51	1.53	**1.59**	1.60	**1.65**	**1.69**	1.58	1.58	**1.59**	**1.62**

- Additional peaks occur in late spring when consumers engage in spring cleaning and at the end of the year when holidays bring guest into homes.

Source: NierlsenIQ Household Care, Total US Full View

In 2025, spend per buyer peaked in JAS for household care while baby and family remained steady

Growth is concentrated in a handful of need-based categories. Prioritize these for assortment and promotion.



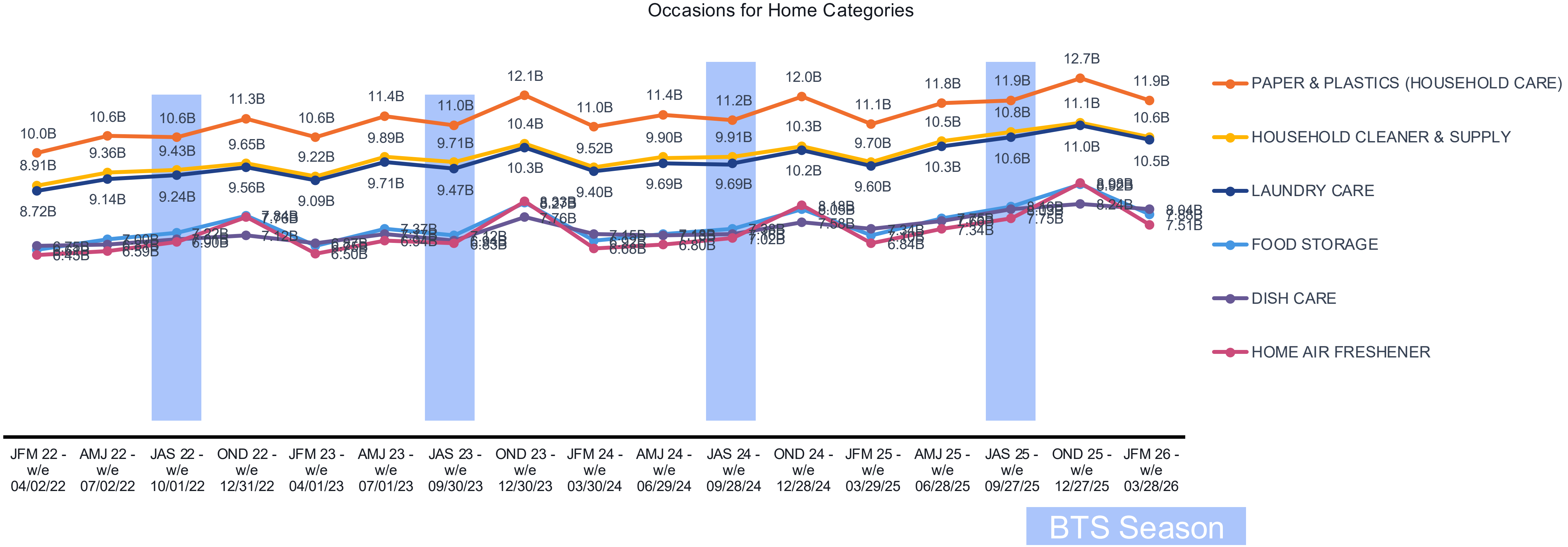
Value per Buyer % Chg. JAS 2025 vs AMJ 2025

Category	% Chg Value Per Buyer
Auto Dish Detergent	+4%
Dish Soap	+3%
Disposable Food Containers	+6%
Food Bags	+7%
Multipurpose Cleaners	+2%
Plastic Wrap	+5%

Source: NielsenIQ Omnishopper

Higher Trip Frequency Raises the Stakes for Every Shelf Decision

Visibility and availability determine whether you win incremental baskets



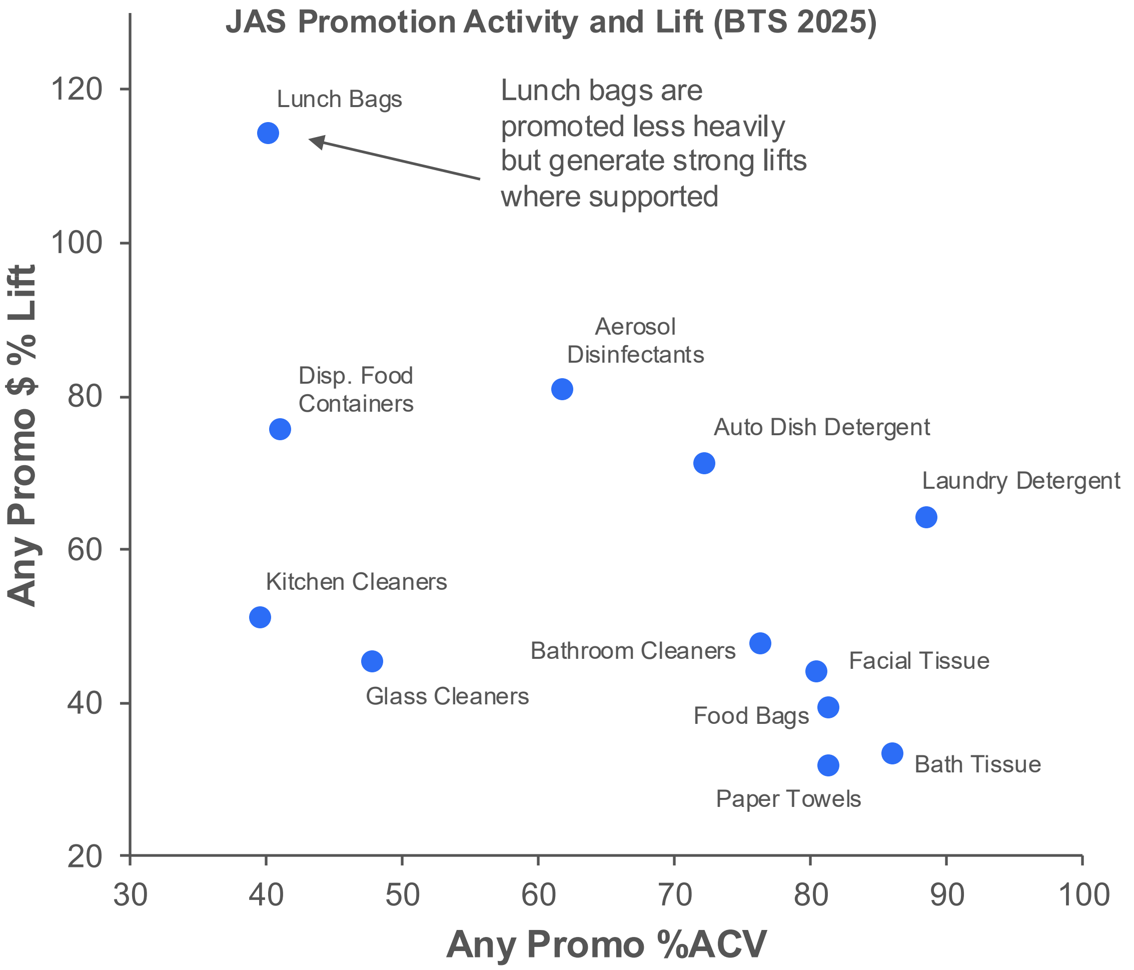
Source: NielsenIQ Panel On Demand Omnishopper

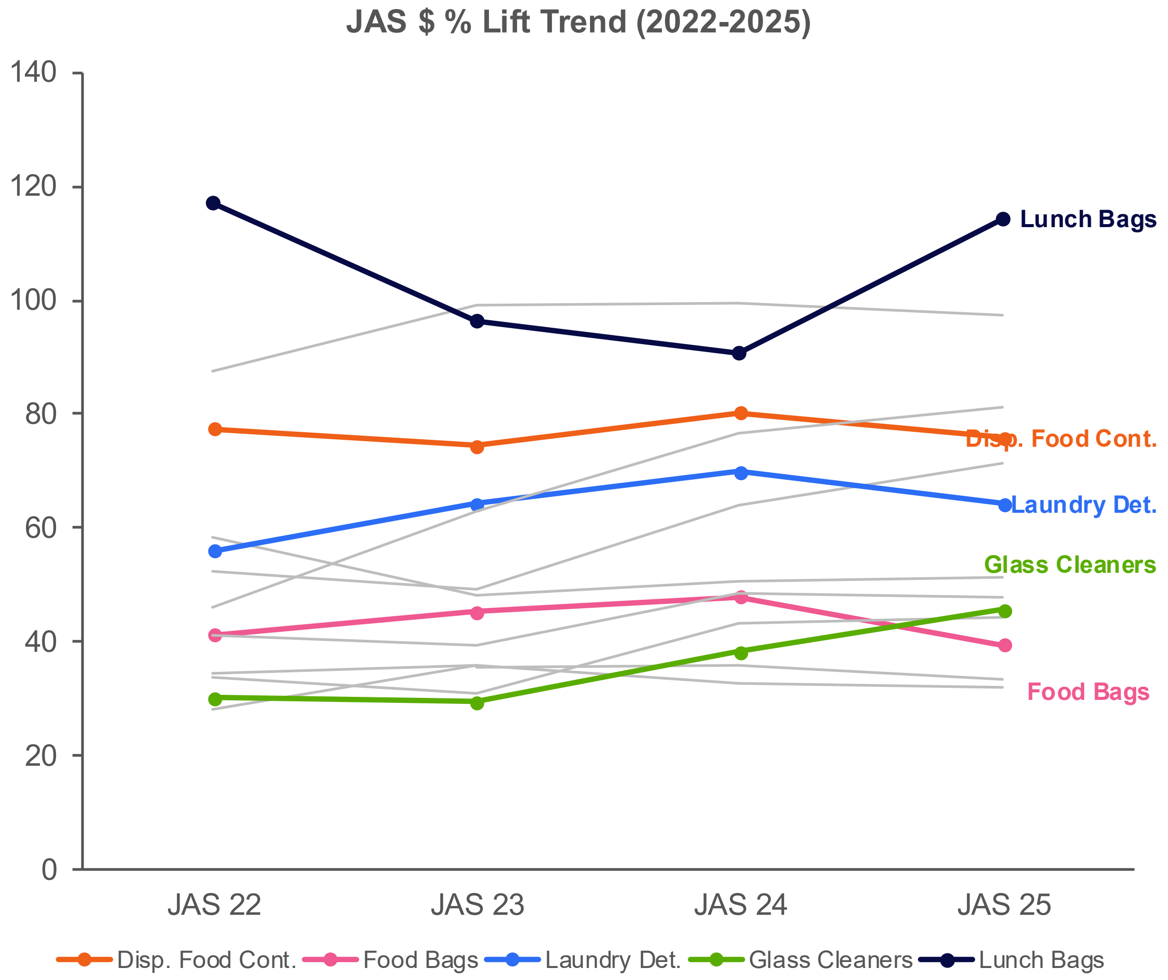
Promotion Effectiveness

Promotional activity is increasing during BTS, but more promotion doesn't always mean better results. Lift trends reveal that some categories are seeing diminishing returns, signaling an opportunity to rethink promotional strategy.

Reallocate Promo Spend to Where It Actually Drives Lift

Some categories are saturated. Shift dollars to where responsiveness remains strong.





Source: NielsenIQ, Total US Full View + Costco, BTS Season (July + August + September)

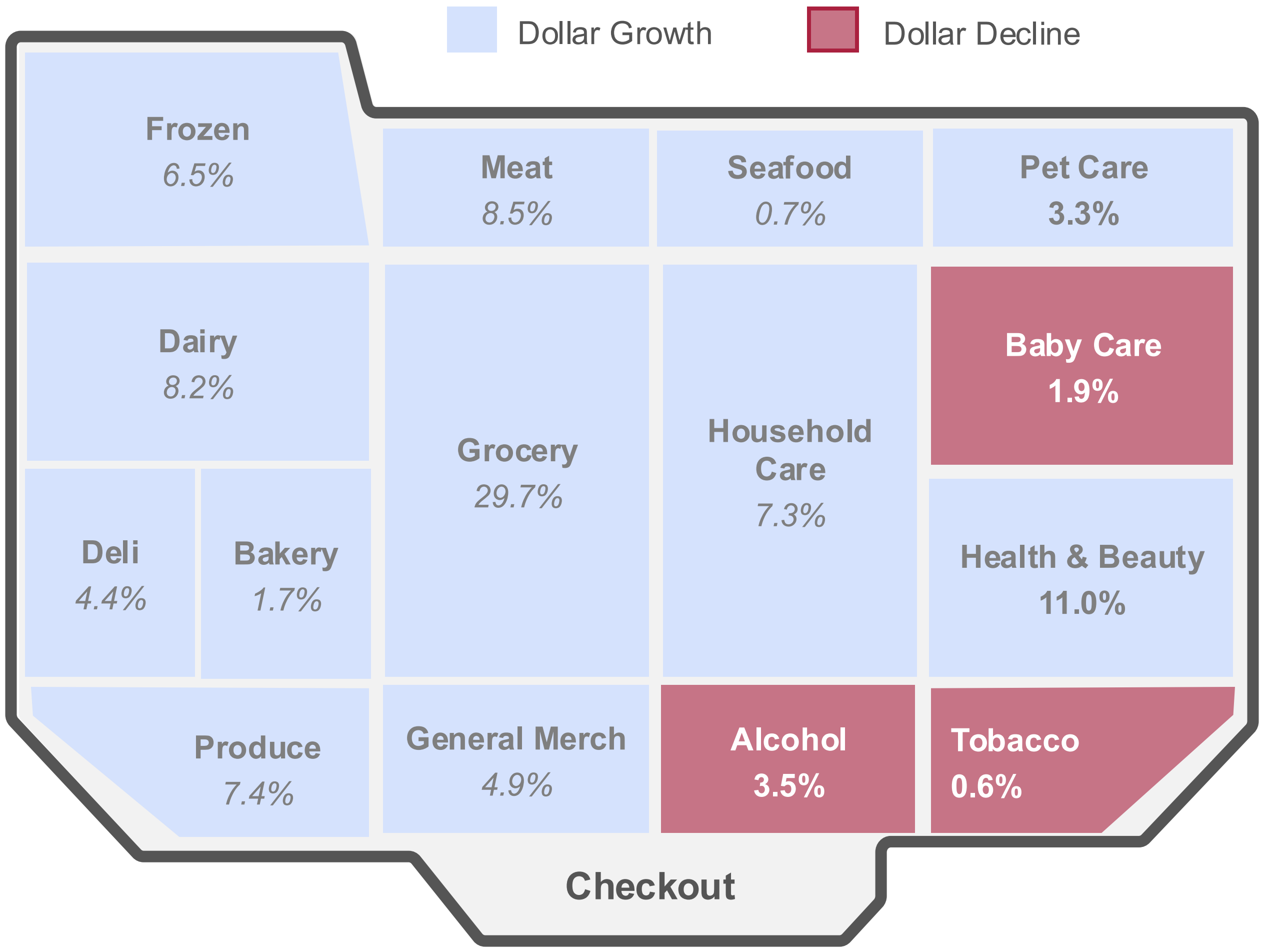
BTS Changes How People Shop as Much as What They Buy

It's not just that consumers spend more on household care during BTS. They also shop more often compared to winter and spring seasons. That increased trip frequency, combined with a growing shift to online channels, creates a distinct purchasing pattern worth understanding.

Household Care Must Compete Harder for Every Dollar During BTS

With only ~7% of store spend, winning requires strong value, visibility, and cross-category relevance.

Department Share of Total Store BTS Sales



BTS $ Category Ranks

Total Store

1. BEVERAGES
2. FRESH MEAT
3. PREPARED FOODS
4. FRUIT
5. VEGETABLES
6. SALTY SNACKS
7. PAPER & PLASTICS
8. PET FOOD
9. CHEESE
10. DESSERTS
11. CANDY, GUM, MINTS
12. BEER/FMB/CIDER/SELTZER
13. PROCESSED MEAT
14. LAUNDRY CARE
15. FULLY COOKED MEAT

HH Care Category

1. BATH TISSUE
2. LAUNDRY DETERGENT
3. PAPER TOWELS
4. DISPOSABLE DISHWARE
5. TRASH BAGS
6. MULTI PURPOSE CLEANERS
7. DISH SOAP
8. IN WASH TREATMENTS
9. FABRIC SOFTENERS
10. FOOD BAGS
11. FLOOR CARE
12. FACIAL TISSUE
13. AUTO DISH DETERGENT
14. CLEANING IMPLEMENTS
15. SCENTED OIL PLUG INS

Source: NielsenIQ RMS | Total US Full View+Costco | BTS 2025 (July + Aug + Sep)

Multiple Household Care Categories Show Strong Sales Skew Toward BTS

Prioritize those with strong seasonal skew for outsized returns.

Monthly Index | Yellow = Strong Skew (>120) | Green = Moderate Skew (110-120) | Blue Columns = BTS (Jul-Sep)

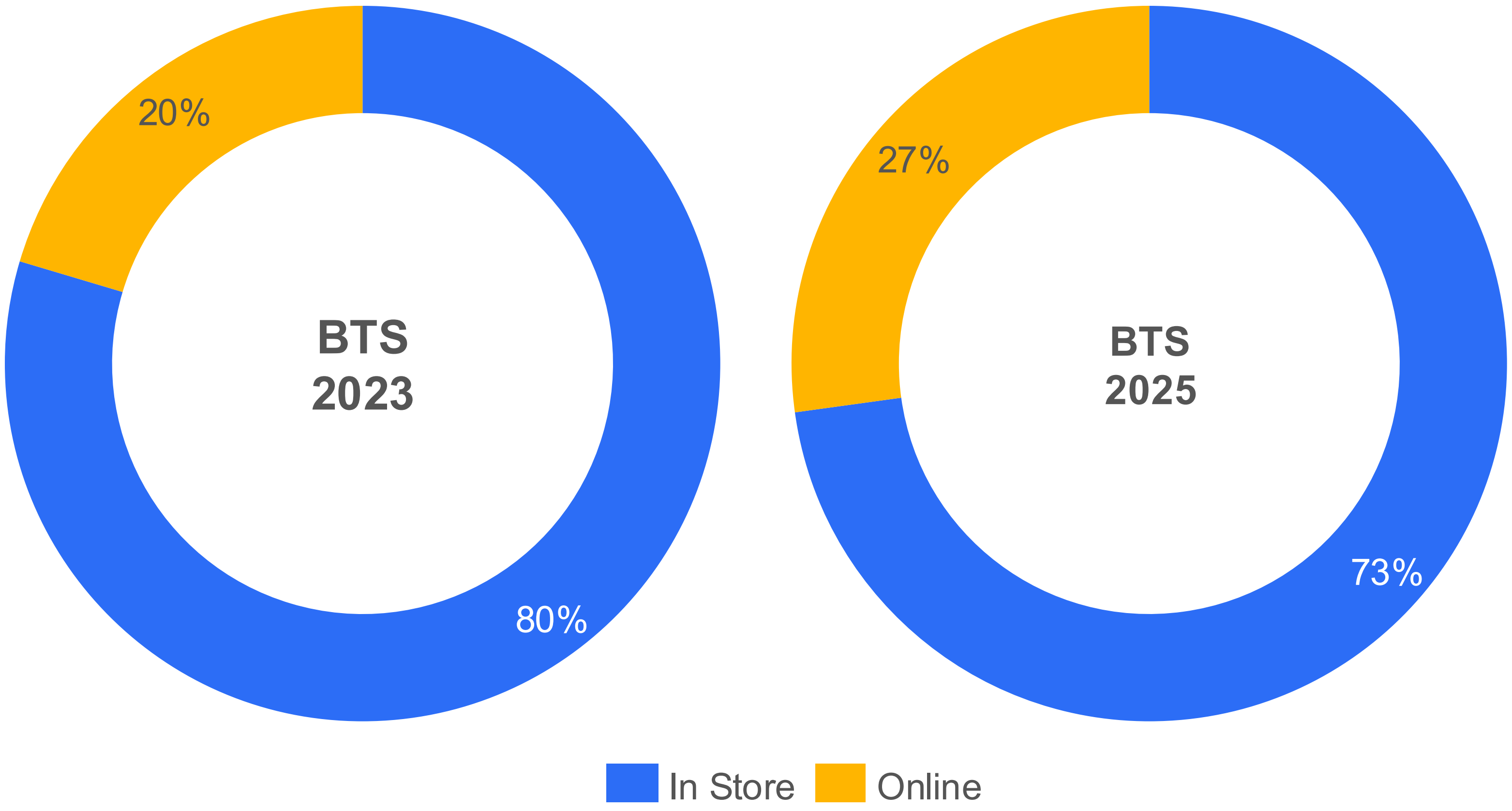
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
FOOD STORAGE	98.5	91.0	91.8	92.8	94.9	96.0	102.7	110.9	96.3	94.4	119.4	111.3
HOME AIR FRESHENER	87.8	94.7	97.6	93.8	96.3	85.3	86.2	98.4	106.7	109.9	118.5	**124.7**
HOUSEHOLD CLEANER & SUPPLY	99.0	96.6	103.6	97.8	97.5	98.3	102.9	112.6	102.3	98.4	97.3	93.8
PAPER & PLASTICS (Lunch Bags)	82.6	85.6	89.9	94.0	95.3	93.4	**122.6**	**159.3**	102.8	91.3	91.3	91.8
WATER FILTRATION PRODUCTS	110.2	92.2	97.0	96.3	97.3	97.8	100.5	**137.7**	95.3	91.7	91.3	92.7

Source: NielsenIQ RMS | Total US Full View | BTS 2025 (July + Aug + Sep)

Digital Is Becoming a Primary Battleground for BTS Growth

Digital is gaining share quickly. Winning requires strong search, discovery, content, and fulfillment.

Share of Household Care Dollar Sales during BTS Season



Comments

Retailers Driving Online Growth

- Whole Foods Market
- Amazon
- Walmart
- Sam’s
- Tik Tok Shop
- Costco

Source: NielsenIQ Omnisales, BTS 2023 = JAS 23 - w/e 09/30/23, BTS 2025 = JAS 25 - w/e 09/27/25

New Entrants Are Reframing Value Through Performance and Sustainability

Newer brands are capitalizing on BTS momentum. Eighteen brands launched in the past three years are gaining significant volume, and they share a common playbook: leading with safety, sustainability, and high-performance claims.

Newer Brands Are Capturing Dollars During BTS

These 18 brands or line extensions launched in the past 3 years, most of which are seeing strong growth across key categories

Category	Brand	JAS '25 $ Sales
Food Storage	HANDI-WRAP	$3,883,942
Home Air Fresheners	BELLEVUE	$4,117,863
	HOMEDICS	$1,176,104
	PURA	$1,678,628
HH Cleaners & Supply	CORE HOME	$231,034
	POOPH	$4,422,786
Laundry Care	ATTITUDE	$4,102,571
	POP & STORE	$6,587,044
	THE LAUNDRESS	$2,787,450
	ZUM	$3,241,592
Paper & Plastics	COLORTEX	$4,737,483
	FLEXI-STRAWZ	$3,148,854
	PIZAZZ	$4,008,564
	SERU	$6,774,314
Pest Control	BONIDE	$7,960,963
	DYNATRAP	$2,032,088
	GARDEN TECH	$6,765,955
	RESCUE!	$8,688,776

Claims Are the New Currency of Shelf Differentiation

The 18 new brands/extensions lead with safety and sustainability while touting high performance. Growth is not just share shift. It is basket expansion driven by differentiated propositions.

50%

Clean / Safe

9 of 18 brands

- HOMEDICS
- PURA
- POOPH
- ATTITUDE
- THE LAUNDRESS
- ZUM
- COLORTEX
- DYNATRAP
- RESCUE!

44%

Sustainable

8 of 18 brands

- CORE HOME
- ATTITUDE
- ZUM
- COLORTEX
- FLEXI-STRAWZ
- PIZAZZ
- DYNATRAP
- RESCUE!

67%

Performance / Tech

12 of 18 brands

- HANDI-WRAP
- BELLEVUE
- HOMEDICS
- PURA
- POOPH
- POP & STORE
- THE LAUNDRESS
- SERU
- BONIDE
- DYNATRAP
- GARDEN TECH
- RESCUE!

Sustainability Is Moving From Nice-to-Have to Purchase Driver

Claims tied to environmental impact are delivering measurable growth. Build them into core offerings.

Product Characteristics with More Than 10% EQ Vol 3yr CAGR Growth	Environmentally Friendly Stated	Water Conservation Stated	Upcycled Stated
Categories Driving Growth	Paper and Plastics	Household Cleaner & Supply	Paper and Plastics
	Laundry Care		
	Pest Control		

Source: NielsenIQ, Nielsen Product Insights 52 Weeks Ending 5/16/2026

Growth Is Uneven. Precision Matters More Than Ever

BTS performance isn't uniform. Regional dynamics, weather patterns, and household composition all shape which categories grow and where. Understanding these differences is key to targeting the right consumers in the right markets.

Regional and Weather Differences Are Creating Local Winners and Losers

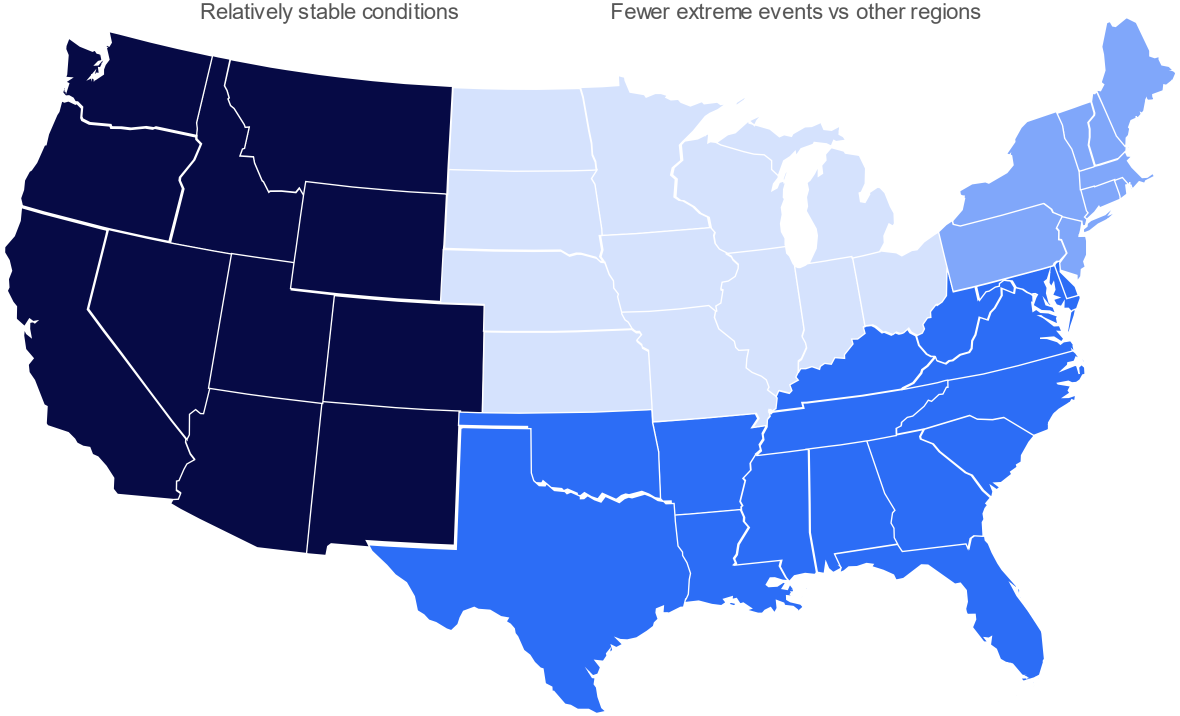
National strategies miss the mark. Use local conditions to guide assortment and messaging.

Midwest/Central

Weather Anomaly	Detail
Near-average July temps	Less extreme vs coasts 2
Patchy precipitation	Mix of wet and dry zones across region 2
Late-season warmth	Above-normal temps in September 5
Expanding drought	Dryness increased late summer into fall 5
Relatively stable conditions	Fewer extreme events vs other regions

West

Weather Anomaly	Detail
Persistent above-normal heat	Much of summer ranked **well above normal temps across West** 1
Prolonged dry conditions	Below-average rainfall across Southwest and Great Basin 2
Unseasonable September heatwave	Record/near-record temps due to blocking high-pressure system 3
Delayed seasonal transition	Summer-like heat extended into BTS period



Northeast

Weather Anomaly	Detail
Record warm overnight temps (July)	Impacted 55M+ people; multiple states saw record warm nights 4
High storm & flooding activity	One of highest July flash flood warning counts in decades 4
Cooler-than-normal August	Broad East, especially Northeast (~–2°F anomalies) 6
Drying trend in September	Much of region turned unseasonably dry 5
Temperature volatility	Hot July → cool August → warm/dry September swing

South/Southeast

Weather Anomaly	Detail
Extreme flooding (early July)	Up to ~20 inches rain in Texas; catastrophic flooding event 4
Elevated humidity + heat	Sustained above-normal temps through summer 2
Extended September heat	Temps **5–10°F above normal** late season 5
Late-season drying	Dry conditions expanded across region by September 5
Storm activity	Tropical systems and heavy rainfall episodes (localized impacts)

Weather Is a Demand Driver You Can Plan Against

Category performance can be anticipated and activated against.

Pest Control

Warm nights + storms = pest surge

Northeast ▲ +11.0%
Record warm nights, flooding

Midwest ▲ +8.9%
Late warmth, expanding drought

South ▼ –1.9%
Extreme flooding disrupted retail

West ▼ –4.1%
Persistent dry heat, fewer pests

KEY STAT
Rodenticide +33% NE; Insect repellent +22% MW/NE vs flat West

Household Cleaners

Flooding + humidity = cleanup demand

Northeast ▲ +2.5%
Storm/flood cleanup demand

South ▲ +1.5%
Extreme July flooding (TX)

Midwest ▲ +0.8%
Patchy wet zones, humidity

West ▼ –0.7%
Dry conditions, no cleanup need

KEY STAT
Mold/Mildew Prevention. +47% MW, +31% NE; Rust removers +16% South

Laundry Care

Heat + humidity = more washing

South ▲ +1.2%
Sustained heat + high humidity

Midwest ▲ +0.7%
Late-season warmth

Northeast ▲ +0.5%
Hot July, volatile temp swings

West ▼ –2.3%
Extreme dry heat, less activity

KEY STAT
Home Dry Cleaning Kit +89% MW, +73% NE vs only +26% West

⚠ **West Region: Negative in most categories.** Persistent extreme heat + drought broadly suppressed household care demand.

Source: NielsenIQ RMS, Back-to-School 2025 (Jul/Aug/Sep) | Household Care | EQ Volume % Chg vs YA

Category Growth Depends on Where You Play

Align investment to regions where each category has momentum, not national averages.

EQ Volume Weighted % Change vs Year Ago | Jul–Sep 2025 | Color intensity reflects magnitude

	Midwest	Northeast	South	West
Weather Context	Stable; late warmth; drought expanding	Record warm nights; storms; cool Aug	Extreme flooding; heat; humidity	Persistent extreme heat; drought
Baby Feeding	+8.2% ▲	+4.7% ▲	+7.7% ▲	-18.7% ▼
Diapering Needs	+1.7% ▲	+3.6% ▲	+1.8% ▲	-2.1% ▼
Household Cleaners	+1.4% ▲	+2.7% ▲	+2.2% ▲	-0.4% ▼
Home Air Freshener	+1.4% ▲	+0.9% ▲	+1.5% ▲	-0.3% ▼
Laundry Care	+0.7% ▲	+0.5% ▲	+1.3% ▲	-2.3% ▼
Paper & Plastics	-0.3% ▼	-0.7% ▼	+0.0% ▲	-3.0% ▼
Food Storage	-2.2% ▼	-2.0% ▼	-2.0% ▼	-1.1% ▼

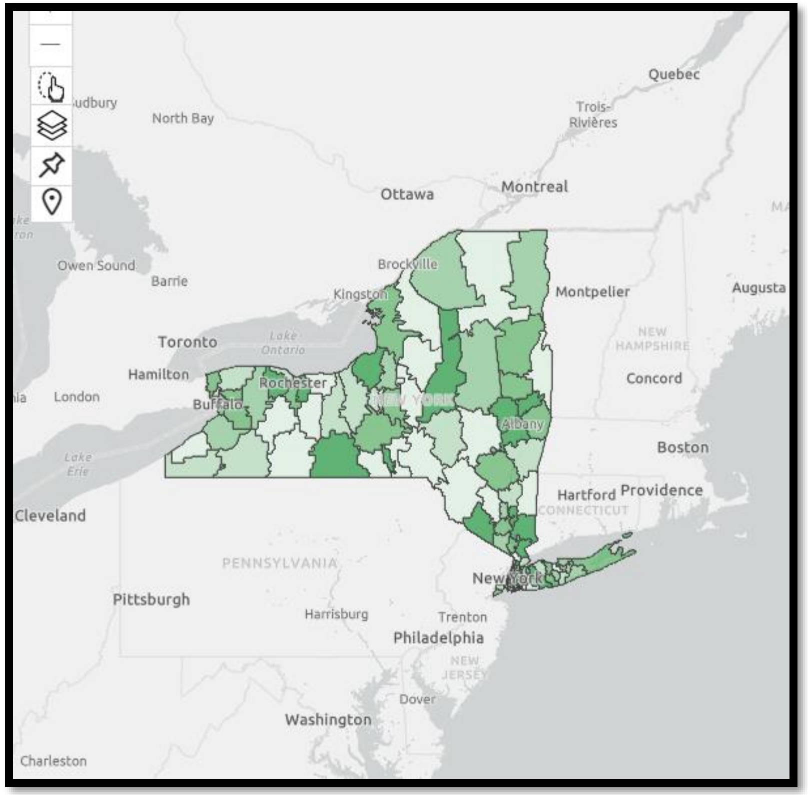
Source: NielsenIQ RMS, Back-to-School 2025 (Jul/Aug/Sep) | Household Care | EQ Volume % Chg vs YA

■ Growth | ■ Decline | Darker = stronger signal

Don’t discount smaller counties as many of them drive household care sales

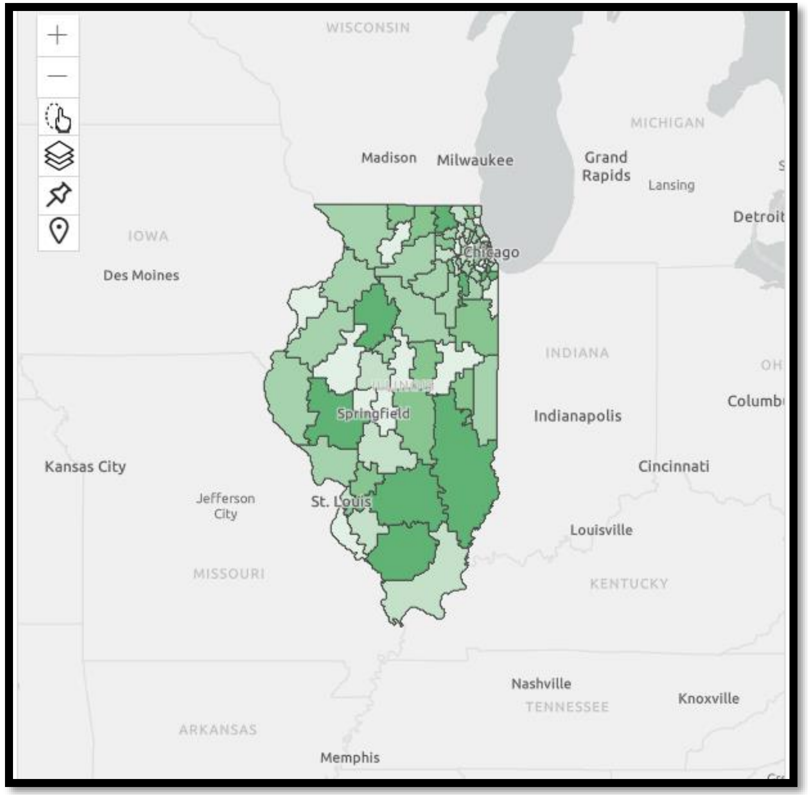
Hyperlocal targeting unlocks overlooked demand pockets.

Household Care Sales
New York State



Think hyperlocal as well to drive maximum sales. In this example of household care sales in Illinois and New York, the dark green areas represent the areas with the top 20% of sales. It’s not always in the major metropolitan areas, in fact much of the time it’s outside them. This stresses the need to manage supply chains effectively in across county sizes.

Household Care Sales
Illinois



Source: NielsenIQ Precision Solutions, 4 weeks Ending 9/27/2025

The Reset Looks Different Across Household Types

Households without kids see an increase in penetration for cleaning products while kid households increase around disinfecting, personal care, and food portability.

HH Penetration	HH w/Kids Under Age 18				No Kids under 18 in HH			
	JFM 25 - w/e 03/29/25	AMJ 25 - w/e 06/28/25	JAS 25 - w/e 09/27/25	OND 25 - w/e 12/27/25	JFM 25 - w/e 03/29/25	AMJ 25 - w/e 06/28/25	JAS 25 - w/e 09/27/25	OND 25 - w/e 12/27/25
BATHROOM CLEANERS	35.3	34.9	36.9	34.8	33.7	34.3	36.8	34.1
BLEACH	21.4	22.5	24.1	22.1	21.1	23.1	24.4	21.8
FACIAL TISSUE	36.9	31.0	37.5	34.6	42.3	37.3	36.6	40.1
FOOD BAGS	51.5	50.7	56.3	52.0	46.8	47.1	49.8	48.7
GLASS CLEANERS (HOUSEHOLD)	11.1	10.7	11.4	10.6	10.3	10.6	11.4	10.5

Source: NielsenIQ Omnishopper, Total US All Outlets

Let us know what you think!

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Darren Seifer
Darren.Seifer@nielseniq.com

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