

Strictly Embargoed until 00.01 hrs - Tuesday 5th December 2023

BRC – KPMG RETAIL SALES MONITOR

NOVEMBER 2023

COVERING FOUR WEEKS 29TH OCTOBER – 25TH NOVEMBER 2023

BLACK FRIDAY BOOST DOESN'T BRING MUCH FESTIVE JOY

| <i>% CHANGE YEAR-ON-YEAR</i> | | TOTAL | LIKE-FOR-LIKE |
|------------------------------|---|-------|---------------|
| UK RETAIL SALES | ▲ | +2.7% | +2.6% |
| FOOD (3-MTH) | ▼ | +7.6% | +7.8% |
| NON-FOOD (3-MTH) | ▼ | -1.6% | -2.3% |
| NON-FOOD – STORE (3-MTH) | ▼ | -0.8% | -2.0% |
| NON-FOOD – ONLINE | ▲ | -2.1% | N/A |





Helen Dickinson OBE, Chief Executive | British Retail Consortium

“Black Friday began earlier this year as many retailers tried to give sales a much-needed boost in November. While this had the desired effect initially, the momentum failed to hold throughout the month, as many households held back on Christmas spending. Health and beauty products showed stronger growth, but non-food sales were down overall year on year. November had the highest proportion of non-food goods purchased online for 2023, though this remains below the previous years’ level.

“Retailers are banking on a last-minute flurry of festive frivolity in December and will continue working hard to deliver an affordable Christmas for customers so everyone can enjoy some Christmas cheer. Looking ahead to 2024, retailers will have to shoulder many new cost pressures, including a rise to business rates, as well as costs from other new regulations. These combined with the biggest rise on record to the National Living Wage will mean retailers will have less capital to invest in lowering prices for their customers.”



Paul Martin, UK Head of Retail | KPMG

“With the clock ticking down to Christmas, sales growth in November remained weak at 2.7%, despite a big push from retailers around Black Friday deals.

“Food and drink, health, personal care and beauty categories continued to drive growth whilst jewellery and watches saw the biggest decline in sales on the high street, suggesting consumers are abandoning expensive presents in favour of more budget friendly gifting. Online sales fell yet again, but penetration rates rose by 5% on October to 41.5% as consumers shopped around for Black Friday bargains.

“With less than a month to go and sales growth limping along, the cost-of-living crisis has taken its toll on Christmas spending for many households, and the continued economic conditions are testing consumer resilience. Price remains the main purchasing driver, so we are likely to see a prolonged and well targeted period of discounting as retailers compete hard for a shrinking pool of spend and will need to clear stock.

“With two of the three months of the crucial golden quarter seeing sales growth below 3%, it has already been a weak Christmas trading period. Any excess stock not sold before Christmas could be further reduced leading to big January sales, and potentially having an even greater impact on already tight margins. As we look to the first few months of 2024, we can expect the challenges to continue which could lead to further casualties in the sector, particularly pure online players facing more than 28 months of consecutive sales decline.”

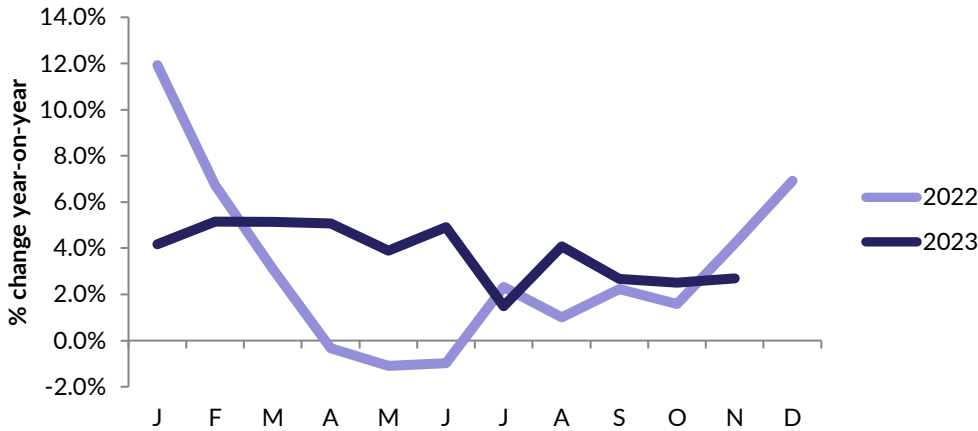


Food & Drink sector performance | Sarah Bradbury, CEO | IGD

“For a second month in a row, food and drink sales were down in November compared to October. The comparatives to November ’22 paint a slightly better picture with an increase in sales, although this was offset by a marginal decline in volume. Footfall for the month was down compared to November ’22, a likely result of storms Ciarán and Debi bringing wetter and more windy weather across the country.

“IGD’s Shopper Confidence Index enjoyed a slight rise in November, driven primarily by a rise in confidence among the lowest income earners. This group were likely boosted by plans for the national minimum wage to rise announced by the government in the Autumn Statement. Although lower income earners still expect to be ‘about the same’ financially next year, rather than actively better off. Trust in the industry rose again, with 30% now trusting the food and consumer goods industry to keep prices low, compared to 24% in October ’23. This is likely to continue further if general sentiment continues to improve.”

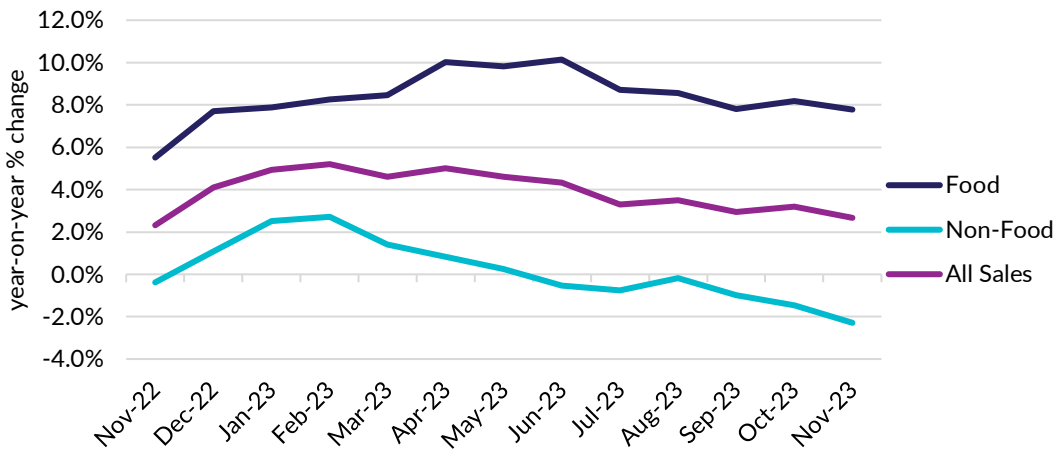
MONTHLY GROWTH OF TOTAL RETAIL SALES



| | LFL | TOTAL |
|-------------|------|-------|
| Nov 2023 | 2.6% | 2.7% |
| Nov 2022 | 4.1% | 4.2% |
| Oct 2023 | 2.6% | 2.5% |
| 3m average | 2.7% | 2.6% |
| 12m average | 4.0% | 4.1% |

Source: BRC-KPMG RSM (Includes Food data from IGD)

**LIKE-FOR-LIKE SALES:
3-MONTH AVERAGE % CHANGE YEAR-ON-YEAR**



| 3-MONTH AVERAGE | LFL | TOTAL |
|-----------------|-------|-------|
| Food | 7.8% | 7.6% |
| Non-food | -2.3% | -1.6% |
| All Sales | 2.7% | 2.6% |

Source: BRC-KPMG RSM (Includes Food data from IGD)

Note: Like-for-like has been measured EXCLUDING temporarily closed stores due to COVID-19 but including Online sales

OVERVIEW

In November, retail sales were once again lacklustre, rising only to 2.7% on a Total basis, up from 2.5% a month earlier. This was the third consecutive month at broadly the same level of growth, with the three-month average at 2.6%, which is concerning for retailers hoping to see stronger demand as we are now well into the festive season.

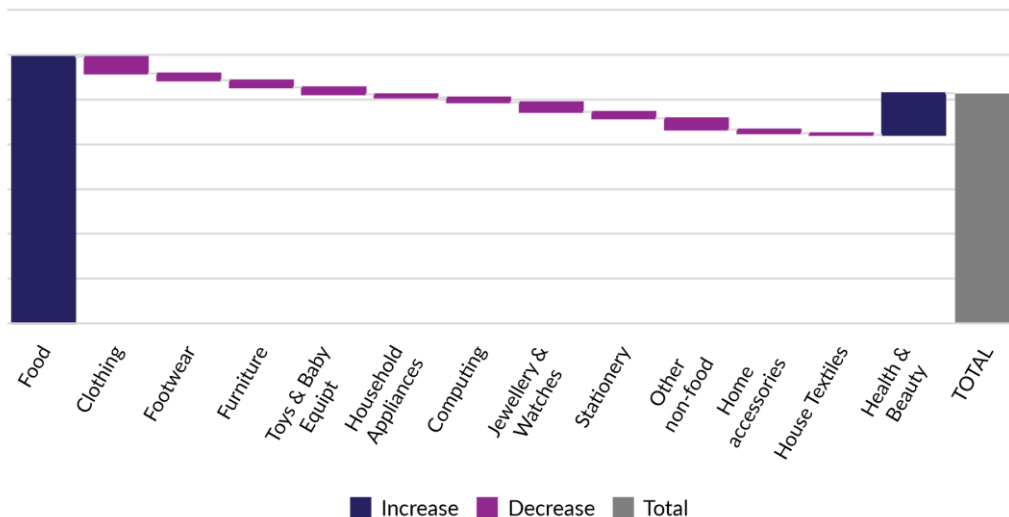
Food sales continue to provide the lion's share of growth every month, with the three-month average only falling to 7.6% as inflation continue to ease considerably. The BRC-NielsenIQ Shop Price Index saw Food price inflation slow to 7.8% in November. Food sales were one of the only areas to see sales for festive favourites pick up as Christmas fast approaches.

Non-Food remained in decline for the third month in a row in November, which is particularly worrying for retailers selling traditional festive gifting options, with only one category on that side of consumer spending seeing any growth for the month. Health & Beauty continued to be the shining light of Non-Food categories, with cosmetics and fragrances performing well and helped by deep discounts from the major fashion houses, accompanied by the strong sales of Beauty advent calendars that have become a staple of people's festive spending. Also, within fashion, clothing sales were strong at the beginning of the month, when several retailers went into Black Friday sales earlier this year. However, this momentum was not carried throughout the rest of the month when sales slowed considerably. The Black Friday sales have always been focussed on tech and other electricals, which although not seeing growth this time around did see demand increase for wearable tech and gaming, with the latter being boosted by discounts on key consoles. TVs, however, did not follow suit, which is more due to the World Cup last year that drove demand, leading to a tough comparable to outperform this year. Larger electrical goods and large items of Furniture remain in the doldrums, with consumers ever more wary of making significant outlays as spending power remains constrained ahead of the most expensive time of year. Black Friday sales were also less impactful online than in the recent past, with consumers preferring to visit the shops as online sales remained in decline for yet another month.

Many retailers appear to be pinning their hopes of a strong festive period on the immediate run-up to Christmas Day, with the timing of the event this year meaning the pre-Christmas week is likely to contain a higher proportion of spending than in the past few years.

James Hardiman, Senior Analyst

NOV: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



Source: BRC-KMG RSM (Includes Food data from IGD); in this chart, purple blocks represent negative contributions

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

Covering the four weeks 29 October – 25 November 2023

**Detailed weekly data by category
is available only to retailers that contribute
sales data to the Retail Sales Monitor.**

If you would like to participate in the Retail
Sales Monitor, please contact:

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BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

Covering the four weeks 29 October – 25 November 2023

MONTHLY RETAIL SALES: % CHANGE YEAR-ON-YEAR

| MONTH | 2021 | | 2022 | | 2023 | |
|-----------------|---------|-------|------|-------|------|-------|
| | LFL (1) | TOTAL | LFL | TOTAL | LFL | TOTAL |
| January | 7.1 | -1.3 | 8.1 | 11.9 | 3.9 | 4.2 |
| February | 9.5 | 1.0 | 2.7 | 6.7 | 4.9 | 5.2 |
| March | 20.3 | 13.9 | -0.4 | 3.1 | 4.9 | 5.1 |
| April | 39.6 | 51.1 | -1.7 | -0.3 | 5.2 | 5.1 |
| May | 18.5 | 28.4 | -1.5 | -1.1 | 3.7 | 3.9 |
| June | 6.7 | 10.4 | -1.3 | -1.0 | 4.2 | 4.9 |
| July | 4.7 | 6.4 | 1.6 | 2.3 | 1.8 | 1.5 |
| August | 1.5 | 3.0 | 0.5 | 1.0 | 4.3 | 4.1 |
| September | -0.6 | 0.6 | 1.8 | 2.2 | 2.8 | 2.7 |
| October | -0.2 | 1.3 | 1.2 | 1.6 | 2.6 | 2.5 |
| November | 1.8 | 5.0 | 4.1 | 4.2 | 2.6 | 2.7 |
| December | 0.6 | 2.1 | 6.5 | 6.9 | | |
| Jan-Nov average | 9.8 | 10.7 | 1.3 | 2.7 | 3.7 | 3.8 |
| Jan-Dec average | 8.9 | 9.9 | 1.8 | 3.1 | n/a | n/a |

Source: BRC-KPMG RSM (Includes Food data from IGD)

FOOD/NON-FOOD QUARTERLY ANALYSIS: 3-MONTH AVERAGE % CHANGE YEAR-ON-YEAR

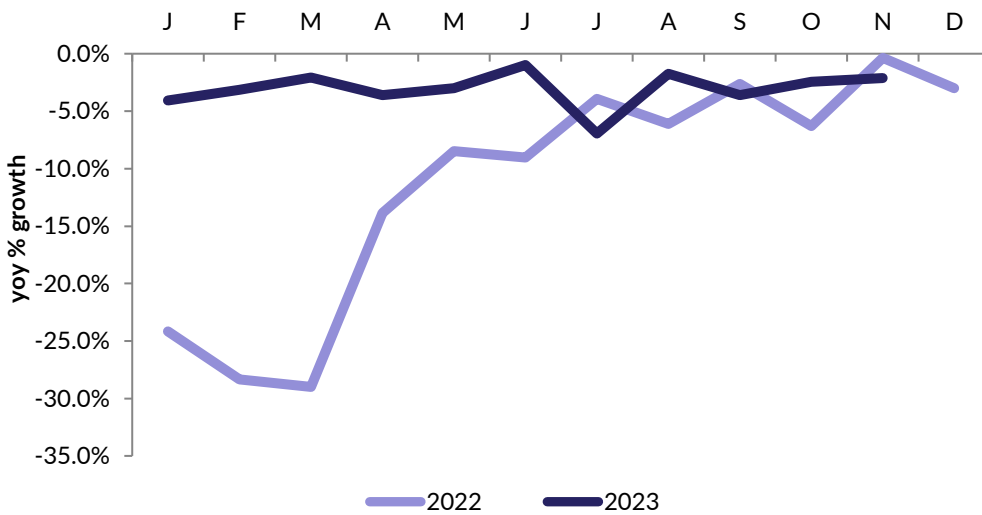
| 3-MONTH AVERAGE | LIKE-FOR-LIKE | | | TOTAL | | |
|-----------------|---------------|----------|-----------|-------|----------|-----------|
| | Food | Non-Food | All Sales | Food | Non-Food | All Sales |
| Sep – Nov 22 | 5.5 | -0.4 | 2.3 | 5.8 | 0.0 | 2.6 |
| Oct – Dec | 7.7 | 1.1 | 4.1 | 7.9 | 1.5 | 4.4 |
| Nov 22 – Jan 23 | 7.9 | 2.5 | 4.9 | 8.0 | 2.9 | 5.2 |
| Dec 22 – Feb 23 | 8.2 | 2.7 | 5.2 | 8.3 | 3.2 | 5.5 |
| Jan – Mar | 8.5 | 1.4 | 4.6 | 8.5 | 1.8 | 4.8 |
| Feb – Apr | 10.0 | 0.8 | 5.0 | 9.8 | 1.2 | 5.1 |
| Mar – May | 9.8 | 0.2 | 4.6 | 9.6 | 0.5 | 4.7 |
| Apr – Jun | 10.1 | -0.5 | 4.3 | 9.8 | 0.3 | 4.6 |
| May – Jul | 8.7 | -0.8 | 3.3 | 8.4 | -0.5 | 3.5 |
| Jun – Aug | 8.6 | -0.2 | 3.5 | 8.2 | -0.2 | 3.6 |
| Jul – Sep | 7.8 | -1.0 | 2.9 | 7.4 | -1.2 | 2.7 |
| Aug – Oct 23 | 8.2 | -1.5 | 3.2 | 7.9 | -1.0 | 3.1 |
| Sep – Nov | 7.8 | -2.3 | 2.7 | 7.6 | -1.6 | 2.6 |

Source: BRC-KPMG RSM (Includes Food data from IGD)

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

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ONLINE SALES GROWTH (NON-FOOD): % CHANGE YEAR-ON-YEAR

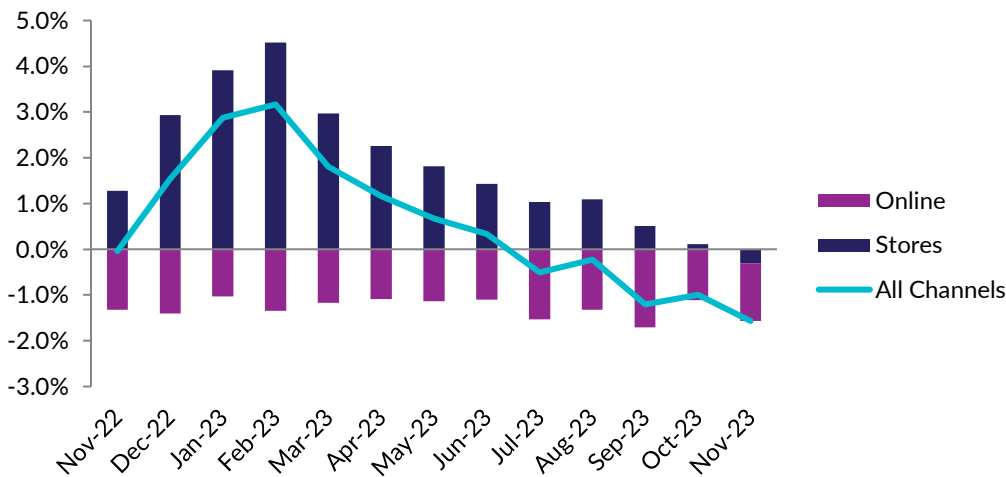


| NON-FOOD GROWTH | ONLINE* | UK TOTAL |
|-----------------|---------|----------|
| Nov 2023 | -2.1% | n/d |
| Nov 2022 | -0.4% | n/d |
| Oct 2023 | -2.5% | n/d |
| 3m avg | -2.8% | -1.6% |
| 12m avg | -3.0% | 0.5% |

n/d: cannot be disclosed

Source: BRC-KPMG RSM: Online: online sales of non-food goods (including mail and phone orders)

3-MONTH AVERAGE: CONTRIBUTION TO NON-FOOD SALES GROWTH BY CHANNEL % CHANGE YEAR-ON-YEAR



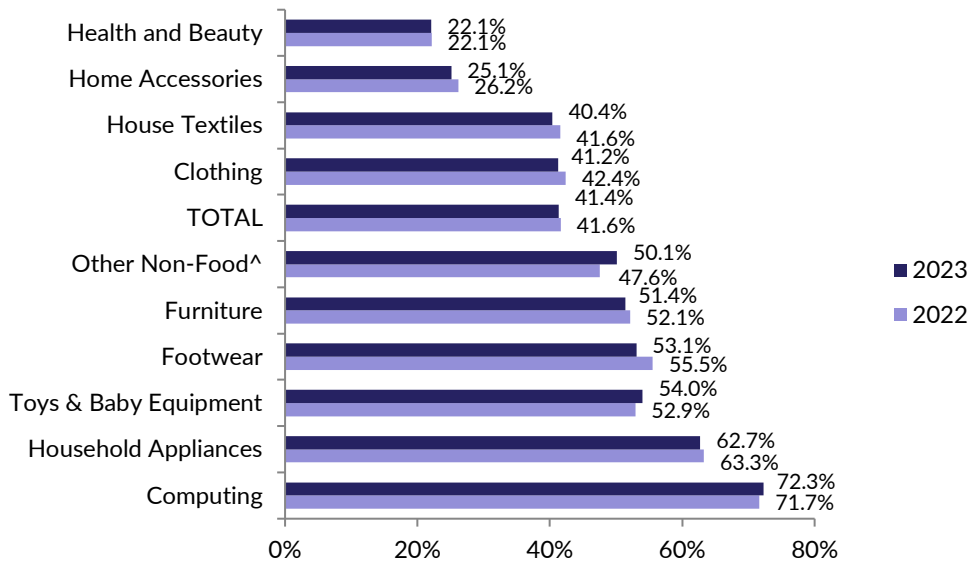
| NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR | | |
|--|-------|-------|
| | LFL | TOTAL |
| Sep - Nov 23 | -2.0% | -0.8% |
| Sep - Nov 22 | 1.6% | 2.2% |
| Aug - Oct 23 | -0.8% | -0.1% |
| 12m avg | 2.2% | 2.9% |

Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

Covering the four weeks 29 October – 25 November 2023

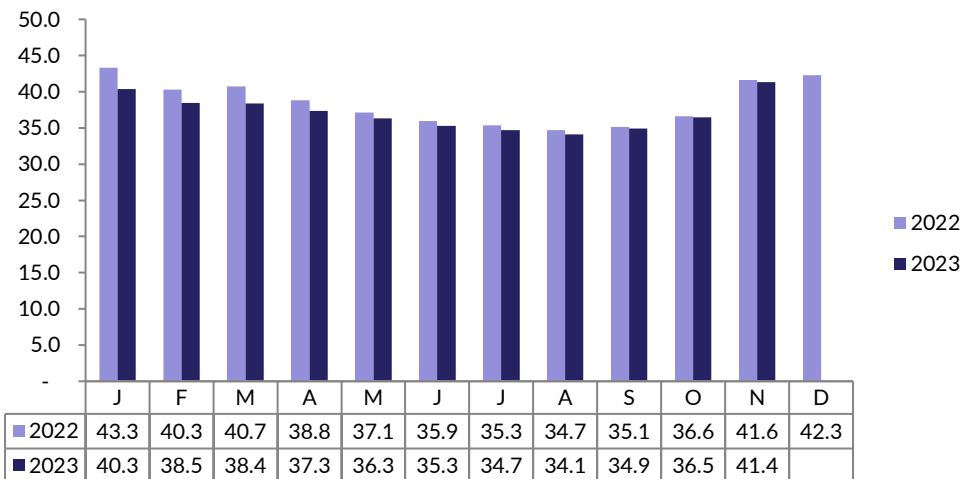
NOV: ONLINE PENETRATION RANKINGS BY CATEGORY



Source: BRC-KPMG RSM

Note: Online sales in the Monitor include all distance sales, notably mail and phone orders

TOTAL NON-FOOD SALES: WEIGHTED ONLINE PENETRATION



| NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL | |
|---|-------|
| Nov 2023 | 41.4% |
| Nov 2022 | 41.6% |
| Oct 2023 | 36.5% |
| 3m average | 37.4% |
| 12m average | 37.5% |

Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

Covering the four weeks 29 October – 25 November 2023

NON-FOOD ONLINE RETAIL SALES

| MONTH | TOTAL GROWTH % CHANGE YOY | | ONLINE PENETRATION AS % OF TOTAL SALES | | CONTRIBUTION TO TOTAL NON-FOOD GROWTH (PERCENTAGE POINT) | |
|----------|---------------------------|-------------|--|------------|--|------------|
| | MONTHLY* | 3M AVERAGE* | MONTHLY | 3M AVERAGE | MONTHLY | 3M AVERAGE |
| Nov 2022 | -0.4 | -3.1 | 46.1 | 39.0 | -0.2 | -1.3 |
| Dec | -3.0 | -3.2 | 42.3 | 41.7 | -1.2 | -1.4 |
| Jan 2023 | -3.6 | -2.4 | 41.8 | 43.3 | -1.5 | -1.0 |
| Feb | -3.1 | -3.2 | 38.5 | 41.0 | -1.2 | -1.3 |
| Mar | -2.1 | -3.0 | 38.4 | 39.0 | -0.7 | -1.2 |
| Apr | -3.6 | -2.9 | 37.3 | 38.1 | -1.4 | -1.1 |
| May | -3.0 | -2.8 | 36.3 | 37.4 | 0.0 | -0.7 |
| Jun | -1.0 | -2.4 | 35.3 | 36.2 | -0.6 | -1.1 |
| Jul | -6.9 | -3.4 | 34.7 | 35.4 | -2.9 | -1.5 |
| Aug | -1.7 | -3.1 | 34.1 | 34.7 | -0.7 | -1.3 |
| Sep | -3.6 | -4.1 | 34.9 | 34.6 | -1.6 | -1.7 |
| Oct | -2.5 | -2.7 | 36.5 | 35.1 | -0.9 | -1.1 |
| Nov | -2.1 | -2.8 | 41.4 | 37.4 | -1.1 | -1.3 |

Source: BRC-KPMG Retail Sales Monitor. * 2020 ws a 53-week year in the ONS calendar: as a result of the extra week in January 2020, the comparable 2019 performances cited here may differ from those published last year, due to the one-week shift in the comparison

NON-FOOD STORE THREE-MONTH AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE

| THREE MONTHS ENDING | TOTAL % CHANGE YOY | LFL % CHANGE YOY |
|---------------------|--------------------|------------------|
| Nov 2022 | 2.2% | 1.6% |
| Dec | 5.3% | 4.5% |
| Jan 2023 | 7.2% | 6.5% |
| Feb | 8.1% | 7.3% |
| Mar | 5.2% | 4.6% |
| Apr | 3.9% | 3.3% |
| May | 2.7% | 2.2% |
| Jun | 2.0% | 0.6% |
| Jul | 1.2% | 0.8% |
| Aug | 1.3% | 1.4% |
| Sep | 0.3% | 0.7% |
| Oct | -0.1% | -0.8% |
| Nov | -0.8% | -2.0% |

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

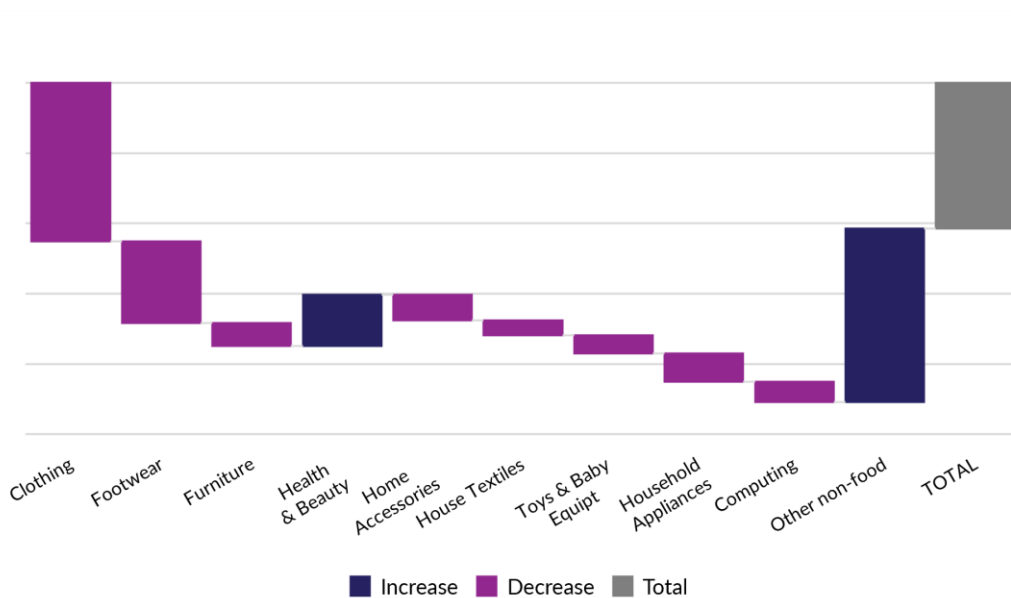
Covering the four weeks 29 October – 25 November 2023

SECTOR PERFORMANCE: ONLINE SALES GROWTH

| CATEGORY | SALES UP / DOWN NOV 2023 | GROWTH RANKINGS | | | | |
|-----------------------|--------------------------|-----------------|----------|----------|--------|---------|
| | | NOV 2023 | OCT 2023 | NOV 2022 | 3M AVG | 12M AVG |
| Health & Beauty | ▲ | 1 | 1 | 4 | 1 | 1 |
| Other Non-Food | ▲ | 2 | 2 | 6 | 2 | 7 |
| Computing | ▼ | 3 | 7 | 8 | 9 | 9 |
| Toys & Baby Equipment | ▼ | 4 | 8 | 9 | 7 | 5 |
| Household Appliances | ▼ | 5 | 3 | 2 | 3 | 2 |
| Furniture | ▼ | 6 | 9 | 1 | 5 | 3 |
| House Textiles | ▼ | 7 | 6 | 5 | 6 | 6 |
| Clothing | ▼ | 8 | 5 | 7 | 8 | 8 |
| Home Accessories | ▼ | 9 | 10 | 10 | 10 | 10 |
| Footwear | ▼ | 10 | 4 | 3 | 4 | 4 |

Source: BRC-KPMG RSM

NOV: CONTRIBUTION TO NON-FOOD ONLINE SALES GROWTH BY CATEGORY



Source: BRC-KPMG RSM

BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

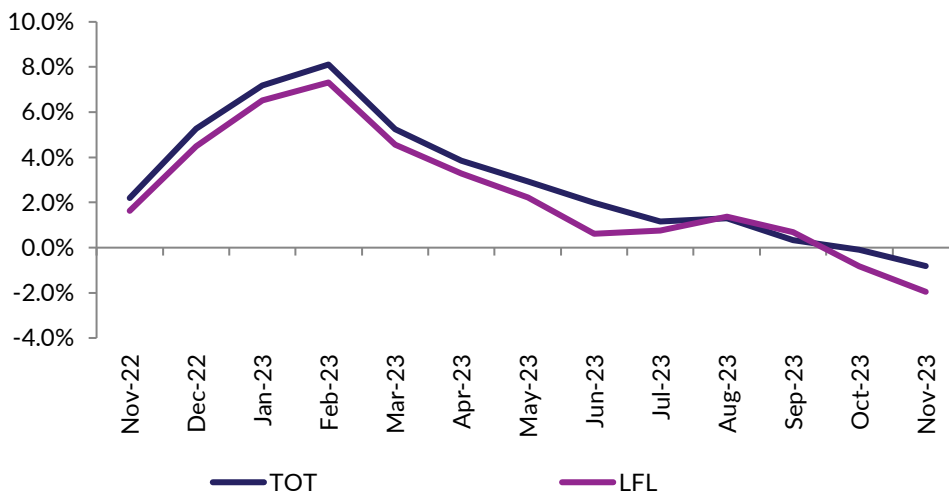
Covering the four weeks 29 October – 25 November 2023

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

| CATEGORY | SALES UP / DOWN NOV 2023 | GROWTH RANKINGS | | | | |
|-----------------------|--------------------------|-----------------|----------|----------|--------|---------|
| | | NOV 2023 | OCT 2023 | NOV 2022 | 3M AVG | 12M AVG |
| Health & Beauty | ▲ | 1 | 1 | 6 | 1 | 1 |
| Footwear | ▲ | 2 | 2 | 2 | 2 | 2 |
| House Textiles | ▲ | 3 | 5 | 3 | 6 | 6 |
| Clothing | ▲ | 4 | 3 | 8 | 5 | 4 |
| Furniture | ▲ | 5 | 8 | 5 | 8 | 8 |
| Household Appliances | ▼ | 6 | 4 | 4 | 3 | 3 |
| Home Accessories | ▼ | 7 | 10 | 9 | 7 | 9 |
| Computing | ▼ | 8 | 6 | 7 | 9 | 10 |
| Other Non-Food | ▼ | 9 | 9 | 1 | 10 | 7 |
| Toys & Baby Equipment | ▼ | 10 | 7 | 10 | 4 | 5 |

Source: BRC-KPMG RSM

NON-FOOD STORE THREE-MONTH AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE (%)



Source: BRC-KPMG RSM



BRC – KPMG RETAIL SALES MONITOR NOVEMBER 2023

Covering the four weeks 29 October – 25 November 2023

NOTES

The BRC-KPMG Retail Sales Monitor measures changes in the actual value (including VAT) of retail sales, excluding automotive fuel. The Monitor measures the value of spending and hence does not adjust for price or VAT changes. If prices are rising, sales volumes will increase by less than sales values. In times of price deflation, sales volumes will increase by more than sales values.

Retailers report the value of their sales for the current period and the equivalent period a year ago. These figures are reported both in total and on a 'like-for-like' basis. Total sales growth is the percentage change in the value of all sales compared to the same period a year earlier. The total sales measure is used to assess market level trends in retail sales. It is a guide to the growth of the whole retail industry, or how much consumers in total are spending in retail – retail spending represents approximately one-third of consumer spending. It is this measure that is often used by economists. Many retailers include distance sales as a component of total sales.

'Like-for-like' sales growth (LFL) is the percentage change in the value of comparable sales compared to the same period a year earlier. It excludes any spending in stores that opened or closed in the intervening year, thus stripping out the effect on sales of changes in floorspace. Many retailers include distance sales as a component of like-for-like comparable sales. The like-for-like measure is often used by retailers, the city and analysts to assess the performance of individual companies, retail sectors and the industry overall, without the distorting effect of changes in floorspace.

From April 2020, the LFL guidance was to exclude stores that were forced to close temporarily due to **COVID-19** measures from both the current period and the equivalent period a year ago. Online was considered open all the time. The majority of retailers could comply but some couldn't exclude temporarily closed stores from their LFL figures.

Online (including mail order and phone) sales of non-food are transactions which take place over the internet, or via mail order or phone. Online sales growth is the percentage change in the value of online sales compared to those in the same period a year earlier. It is a guide to the growth of sales made by these non-store channels. It should be noted that online sales are still a small proportion of total UK retail sales.

Penetration is the proportion of sales attributed to the online channel (including mail order and phone). Penetrations are calculated category by category as online sales submitted by participating retailers relative to total sales those retailers submit to the BRC-KPMG Retail Sales Monitor. Participants who do not sell online (or through non-store channels) are included but participants who do sell online but do not submit their online sales are excluded.

The responses provided by retailers within each sales category are weighted (based on weightings derived from the ONS Family Spending survey) to reflect the contribution of each category to total retail sales, thus making it representative of UK retail sales as a whole. Category weightings for Online and In-Store growth and contribution to growth are derived from the UK weightings. The methodology used for weightings is revised from time to time. Because the figures compare sales each month with the comparable period last year, a seasonal adjustment is not made. However, changes in the timing of Bank Holidays and Easter can create distortions, which should be considered in the interpretation of the data.

As well as receiving sales value direct from the retailers in the scheme the BRC-KPMG Retail Sales Monitor also receives food and drink sales value data from the IGD's Market Track Scheme.

In its role as sponsor of the BRC-KPMG Retail Sales Monitor, KPMG is responsible for the aggregation of the retail sales data provided by the retailers on a weekly basis. This data consists of the relevant current week's sales data and comparative sales figures for the same period in the prior year. The aggregation has been performed by KPMG on data for periods following 2 April 2000 and equivalent prior periods. The accuracy of the data is entirely the responsibility of the retailers providing it. The sponsorship role has been performed by KPMG since 10 April 2000 and the same for the aggregation of comparative sales figures for the period from 2 April 2000 it is not responsible for the aggregation of any data included in this Monitor relating to any period prior to 2 April 2000.

The commentary from KPMG is intended to be of general interest to readers but is not advice or a recommendation and should not be relied upon without first taking professional advice. Anyone choosing to rely on it does so at his or her own risk. To the fullest extent permitted by law, KPMG will accept no responsibility or liability in connection with its sponsorship of the Monitor and its aggregation work to any party other than the BRC.



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The December 2023 Monitor, covering the five weeks 26 November – 30 December 2023, will be released at 00.01am on Tuesday 9 January 2024. The data is collected and collated for the BRC by KPMG.

The British Retail Consortium (BRC) is the UK's leading retail trade association. It represents the full range of retailers, large and small, multiples and independents, food and non-food, online and store based.

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**FOOD DATA SUPPLIED BY**

IGD is an education and training charity for the food and grocery industry that undertakes research for the benefit of the public. Our in-depth understanding of shoppers, retailing and supply chains is supported by our knowledge of broader topics affecting the industry – health, nutrition, sustainability and economics among them. This gives us unparalleled insight that can help identify opportunities to improve performance and tackle business challenges. Our reach is global, with experts based in the UK, Singapore and North America. We invest the net income we make from selling our expertise back into our charitable activities.



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**Detailed weekly data by category
is available to retailers who contribute to the monitor:**

If you would like to participate in the Retail Sales Monitor,
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