RETAIL SALES MONITOR

Drab Christmas, as consumers wait for sales

December 2025

Covering the 5 weeks of 30 November 2025 – 3 January 2026

% CHANGE YOY	CHANGE VS NOV-2025	TOTAL	LIKE-FOR-LIKE
UK Retail Sales	▼	1.2%	1.0%
Food	▲	3.1%	2.7%
Non-Food	▼	-0.3%	-0.5%
Non-Food – Store	▼	-0.5%	-0.7%
Non-Food – Online	▼	-0.1%	N/A

HEADLINE COMMENTARY

Helen Dickinson OBE
Chief Executive | British Retail Consortium

"It was a drab Christmas for retailers, as sales growth slowed for the fourth consecutive month. While food sales rose on the back of ongoing food inflation, non-food sales fell flat in the run up to Christmas, with gifting items doing worse than expected. Many people were clearly holding out for discounts, with the last week showing significant growth off the back of Boxing Day and beginning of the January sales. Despite the disappointing December, 2025 saw stronger sales growth overall, as non-food recovered from its 2024 decline.

"These figures show that consumer spending remains cautious, with households squeezed by the rising cost of living. Now is the time to support struggling families with the cost of food and essentials and give the economy the boost it needs. From business rates to the implementation of the Employment Rights Act, there are plenty of opportunities for Government to mitigate costs for retailers and prices for customers."

Linda Ellett
UK Head of Consumer, Retail & Leisure | KPMG

"While there are individual festive success stories among retailers, retail sales largely froze in December. Total retail sales climbed by 1.2 percent, with higher inflation also a factor in the sales growth.

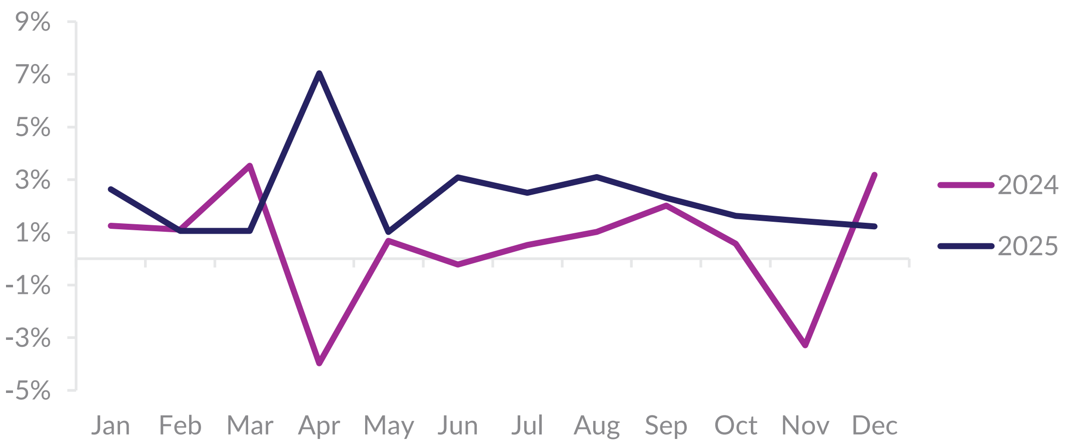
"It remains a challenging time for retailers, with consumers cutting back on spending due to higher household bills and any discretionary spend is being prioritised, particularly toward holidays and home improvements. Retailers are also facing increasing costs while needing to invest in innovation. There will be an ever-sharpening focus on business models, efficiencies and profit margin in the months ahead."

Sarah Bradbury
Food & Drink sector performance, CEO | IGD

"December saw record Christmas grocery sales and a welcome boost in shopper confidence, as often happens during the festive season. However, minimal volume growth highlights that the food and drink industry is still under pressure and nearly half of shoppers told us they were more worried about the cost of Christmas this year. Retailers responded to shopper concerns by highlighting meal affordability and heavy discounting on fresh produce. Overall, it points to a Christmas where shoppers sought ways to celebrate whilst carefully balancing budgets."

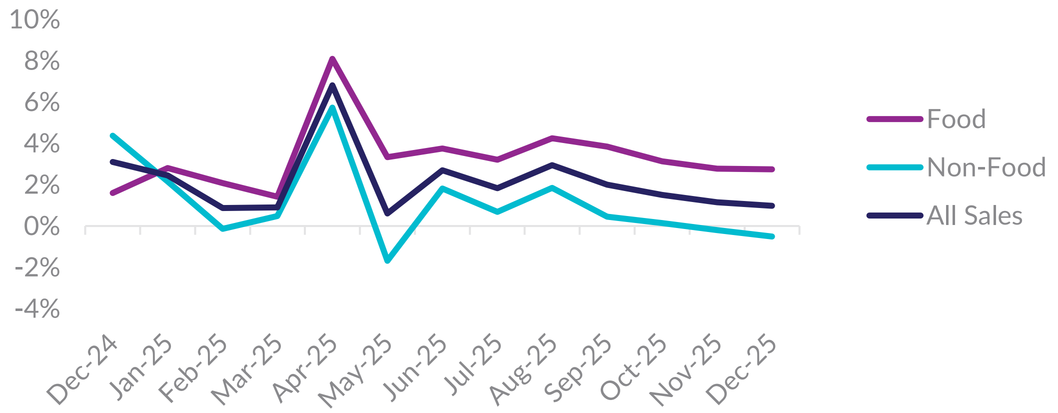
RETAIL SALES TRENDS

MONTHLY GROWTH OF TOTAL RETAIL SALES



Source: BRC-KPMG Retail Sales Monitor (includes Food data from IGD)

LIKE-FOR-LIKE SALES: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR



Source: BRC-KPMG Retail Sales Monitor (includes additional Food data from IGD)

YOY	LFL	TOTAL
Dec-25	1.0%	1.2%
Dec-24	3.1%	3.2%
Nov-25	1.2%	1.4%
3m avg	1.2%	1.4%
12m avg	2.0%	2.3%

MONTHLY AVERAGE	LFL	TOTAL
Food	2.7%	3.1%
Non-food	-0.5%	-0.3%
All Sales	1.0%	1.2%

OVERVIEW

The 2025 festive trading period was marked by volatility, coming out of Black Friday into a challenging pre-Christmas phase, and a notable post-Christmas rebound in physical store footfall and sales. Total sales were up 1.2% year-on-year, with significant variation by week, category and channel.

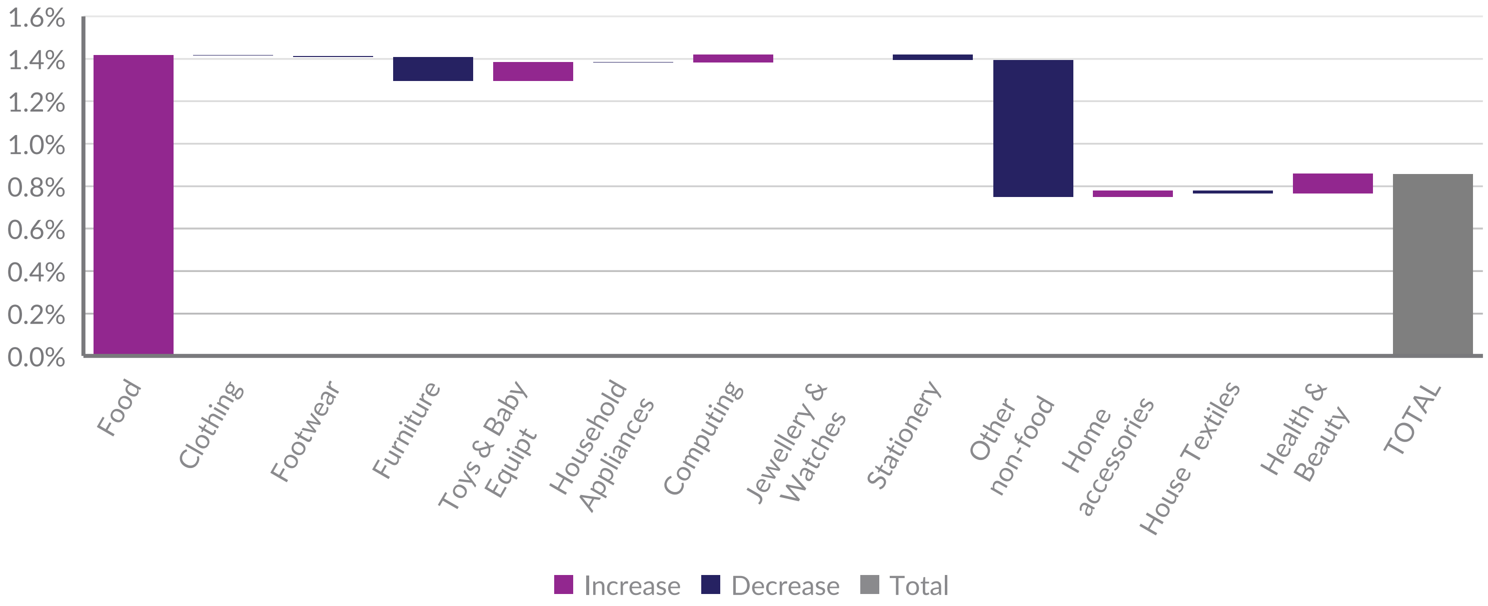
The total sales 1.2% YoY, comprised of a 3.1% uplift in Food and a 0.3% drop in Non-Food. Within the Non-Food category, In-store sales fell by 0.5% YoY, while Online sales fell by 0.1%. Non-Food online penetration was marginally up YoY at 38.6%, which was a big drop from the Black Friday driven November peak of 44%.

Once again, Food inflation heavily supported sales value. Many Non-Food categories were sluggish, with a few bright spots, including Toys, Home Accessories and Gaming.

Ian Bendelow

Senior Analyst

DECEMBER CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



Source: BRC-KMG Retail Sales Monitor (includes Food data from IGD)

Detailed weekly data by category is available only to retailers that contribute sales data to the Retail Sales Benchmark. Further information is available here: https://brc.org.uk/insight/benchmarks/

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

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MONTHLY SALES TRENDS

RETAIL SALES MONTHLY % CHANGE YEAR-ON-YEAR

MONTH	2023		2024		2025	
	LFL	Total	LFL	Total	LFL	Total
January	3.9%	4.2%	1.4%	1.2%	2.5%	2.6%
February	4.9%	5.2%	1.0%	1.1%	0.9%	1.1%
March	4.9%	5.1%	3.2%	3.5%	0.9%	1.1%
April	5.2%	5.1%	-4.4%	-4.0%	6.8%	7.0%
May	3.7%	3.9%	0.4%	0.7%	0.6%	1.0%
June	4.2%	4.9%	-0.5%	-0.2%	2.7%	3.1%
July	1.8%	1.5%	0.3%	0.5%	1.8%	2.5%
August	4.3%	4.1%	0.8%	1.0%	2.9%	3.1%
September	2.8%	2.7%	1.7%	2.0%	2.0%	2.3%
October	2.6%	2.5%	0.3%	0.6%	1.5%	1.6%
November	2.6%	2.7%	-3.4%	-3.3%	1.2%	1.4%
December	1.9%	1.7%	3.1%	3.2%	1.0%	1.2%
Jan-Dec average	3.6%	3.6%	0.3%	0.5%	2.1%	2.3%

Source: BRC-KPMG Retail Sales Monitor (includes Food data from IGD)

MONTHLY SALES TRENDS

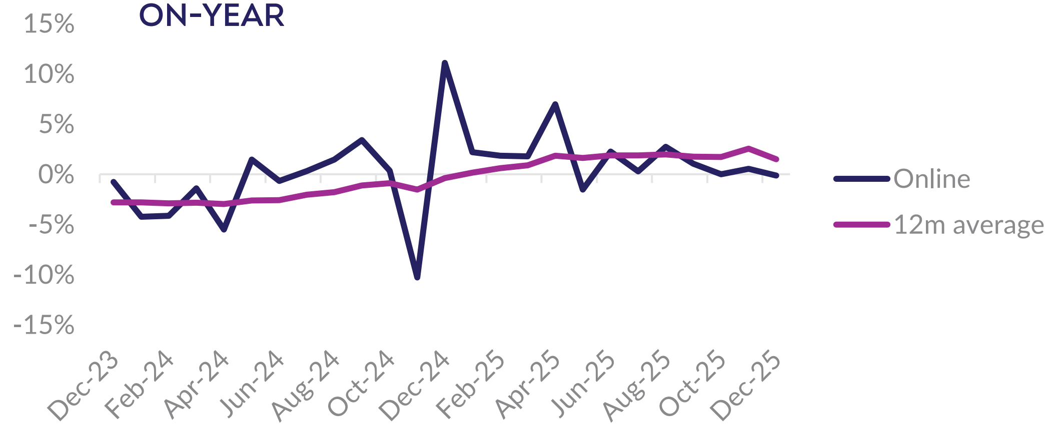
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

MONTHLY AVERAGE	LFL			TOTAL		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2024 Dec	1.6%	4.4%	3.1%	1.7%	4.4%	3.2%
Jan	2.8%	2.2%	2.5%	2.8%	2.5%	2.6%
Feb	2.1%	-0.1%	0.9%	2.3%	0.0%	1.1%
Mar	1.4%	0.5%	0.9%	1.6%	0.6%	1.1%
Apr	8.1%	5.7%	6.8%	8.2%	6.1%	7.0%
May	3.3%	-1.7%	0.6%	3.6%	-1.1%	1.0%
Jun	3.7%	1.8%	2.7%	4.1%	2.2%	3.1%
Jul	3.2%	0.7%	1.8%	3.9%	1.4%	2.5%
Aug	4.2%	1.8%	2.9%	4.7%	1.8%	3.1%
Sep	3.8%	0.5%	2.0%	4.3%	0.7%	2.3%
Oct	3.1%	0.1%	1.5%	3.5%	0.1%	1.6%
Nov	2.8%	-0.2%	1.2%	3.0%	0.1%	1.4%
2025 Dec	2.7%	-0.5%	1.0%	3.1%	-0.3%	1.2%

Source: BRC-KPMG Retail Sales Monitor (includes Food data from IGD)

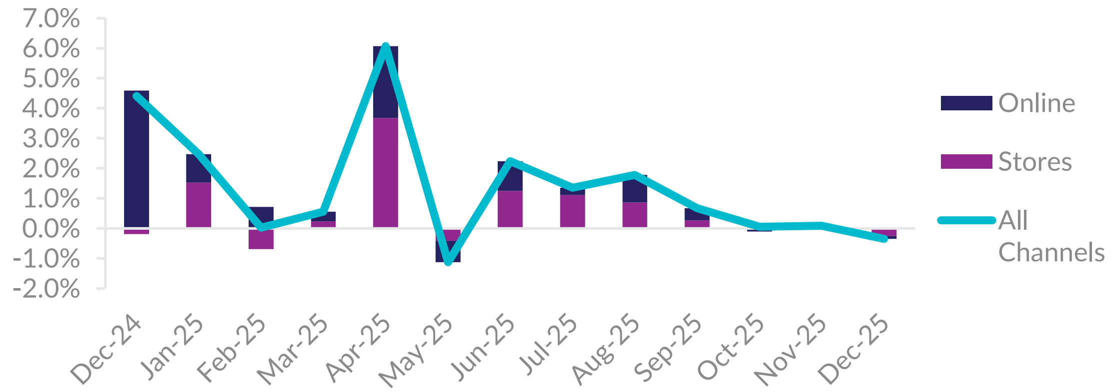
ONLINE VS IN-STORE

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



Source: BRC-KPMG Retail Sales Monitor: online sales of non-food goods (including mail and phone orders)

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



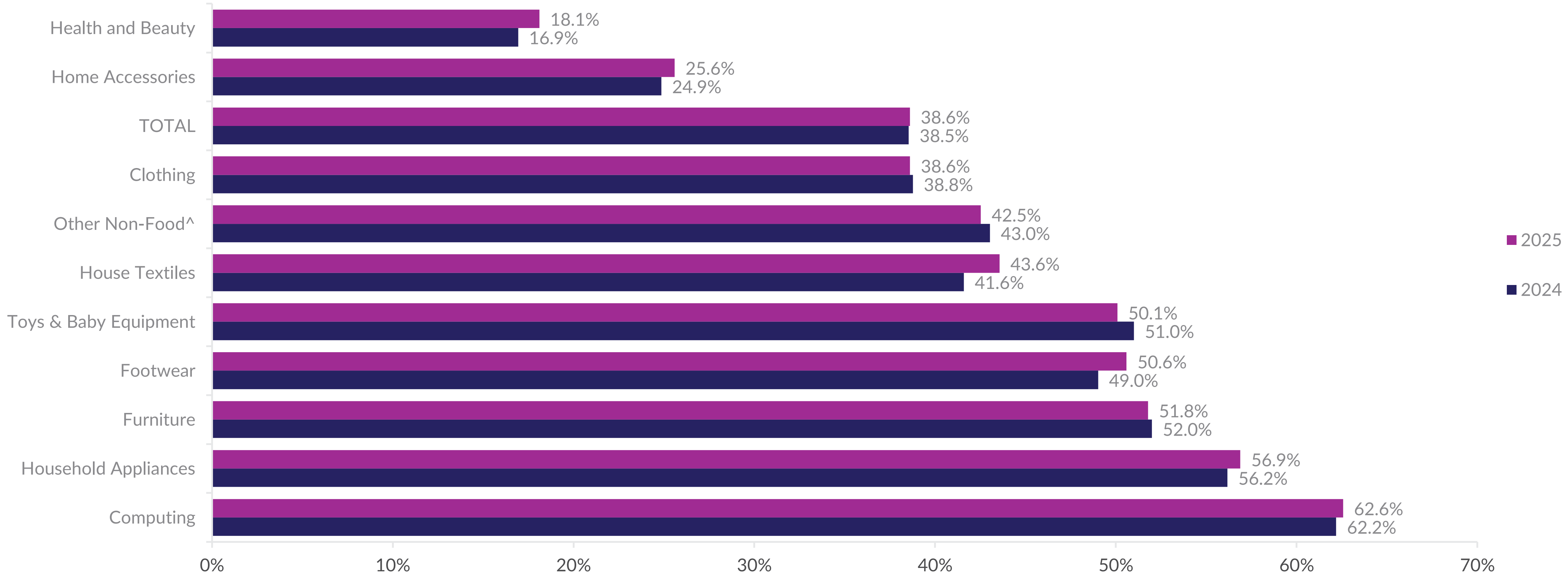
Source: BRC-KPMG Retail Sales Monitor

NON-FOOD GROWTH	ONLINE	UK TOTAL
Dec-25	-0.1%	-0.3%
Dec-24	11.1%	4.4%
Nov-25	0.5%	0.1%
3m avg	0.1%	-0.1%
12m avg	1.5%	1.1%

NON-FOOD INSTORE		
	LFL	Total
Dec-25	-0.7%	-0.5%
Dec-24	0.4%	0.4%
Nov-25	-0.8%	-0.3%
3m avg	-0.5%	-0.2%
12m avg	0.5%	0.9%

ONLINE VS IN-STORE

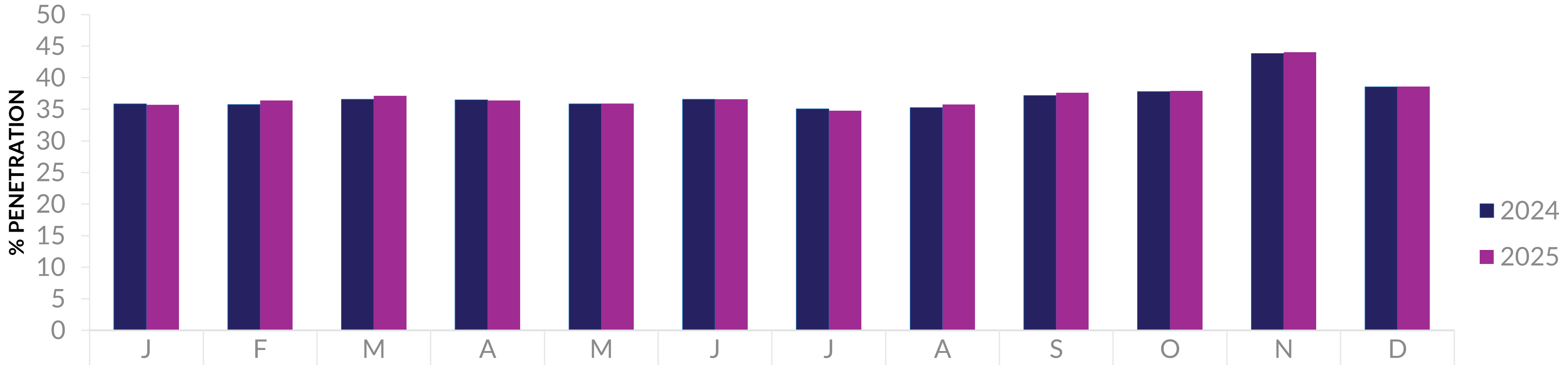
DECEMBER: ONLINE PENETRATION RANKINGS BY CATEGORY



Source: BRC-KPMG Retail Sales Monitor
Note: Online sales in the Monitor include all distance sales, notably mail and phone orders

ONLINE VS IN-STORE

TOTAL NON-FOOD SALES: WEIGHTED ONLINE PENETRATION



	J	F	M	A	M	J	J	A	S	O	N	D
2024	35.8	35.8	36.6	36.5	35.9	36.6	35.1	35.3	37.2	37.8	43.8	38.5
2025	35.7	36.4	37.1	36.4	35.9	36.6	34.8	35.8	37.6	37.9	44.0	38.6

Source: BRC-KPMG Retail Sales Monitor

NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
Dec-25	38.6%
Dec-24	38.5%
Nov-25	44.0%
3m average	40.1%
12m average	37.2%

Online vs In-Store

NON-FOOD ONLINE RETAIL SALES

MONTH	TOTAL GROWTH % CHANGE YOY		ONLINE PENETRATION AS % OF SALES		CONTRIBUTION TO TOTAL NON-FOOD GROWTH (PERCENTAGE POINT)	
	Monthly	3m Avg	Monthly	3m Avg	Monthly	3m Avg
Dec 2024	11.1%	1.2%	38.5%	39.9%	4.6%	0.3%
Jan	2.2%	1.8%	35.7%	39.0%	0.9%	0.5%
Feb	1.9%	5.3%	36.4%	36.9%	0.7%	2.2%
Mar	1.8%	1.9%	37.1%	36.4%	0.3%	0.7%
Apr	7.0%	3.4%	36.4%	36.7%	2.4%	1.1%
May	-1.5%	2.4%	35.9%	36.5%	-0.7%	0.6%
Jun	2.3%	2.5%	36.6%	36.3%	1.0%	0.9%
Jul	0.3%	0.5%	34.8%	35.8%	0.2%	0.2%
Aug	2.7%	1.8%	35.8%	35.8%	0.9%	0.7%
Sep	1.0%	1.3%	37.6%	36.2%	0.4%	0.5%
Oct	0.0%	1.2%	37.9%	37.1%	-0.1%	0.4%
Nov	0.5%	0.6%	44.0%	39.7%	0.1%	0.1%
Dec 2025	-0.1%	0.1%	38.6%	40.1%	-0.1%	0.0%

Source: BRC-KPMG Retail Sales Monitor.

Online vs In-Store

NON-FOOD STORE MONTHLY AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE

MONTH	TOTAL	LFL
Dec 2024	0.4%	0.4%
Jan	2.6%	2.1%
Feb	-1.0%	-1.3%
Mar	-0.1%	-0.3%
Apr	5.6%	5.0%
May	-0.9%	-1.8%
Jun	2.2%	1.6%
Jul	1.9%	0.9%
Aug	1.3%	1.4%
Sep	0.5%	0.1%
Oct	0.1%	0.2%
Nov	-0.3%	-0.8%
Dec 2025	-0.5%	-0.7%

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

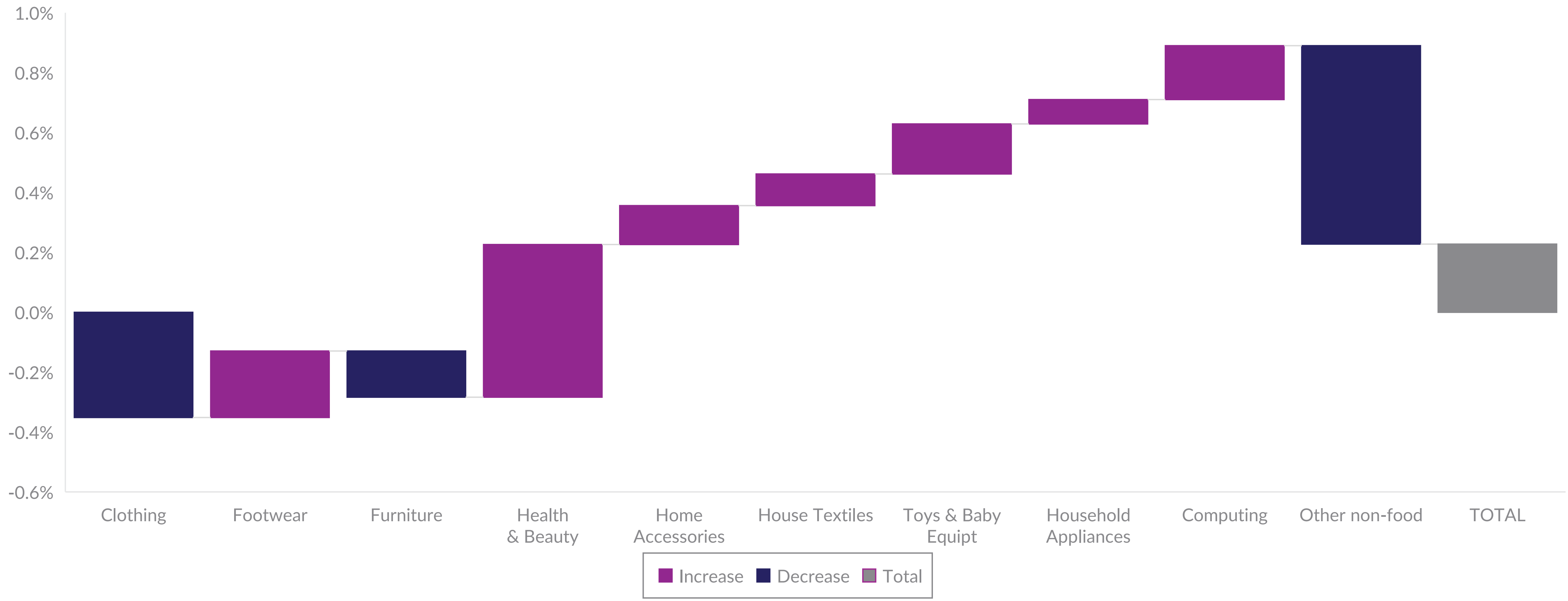
CATEGORY PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

CATEGORY	RANKING UP/DOWN VS NOV-25	DEC-25	NOV-25	DEC-24	3M AVG	12M AVG
Health & Beauty	=	1	1	2	1	2
Home Accessories	=	2	2	9	2	4
House Textiles	=	3	3	8	3	3
Toys & Baby Equipment	▲	4	6	4	6	5
Computing	▼	5	4	1	4	1
Footwear	▲	6	7	5	5	9
Household Appliances	▲	7	8	6	8	6
Clothing	▲	8	10	7	9	10
Furniture	▼	9	5	10	7	7
Other Non-Food	▼	10	9	3	10	8

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

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



BRC-KPMG Retail Sales Monitor

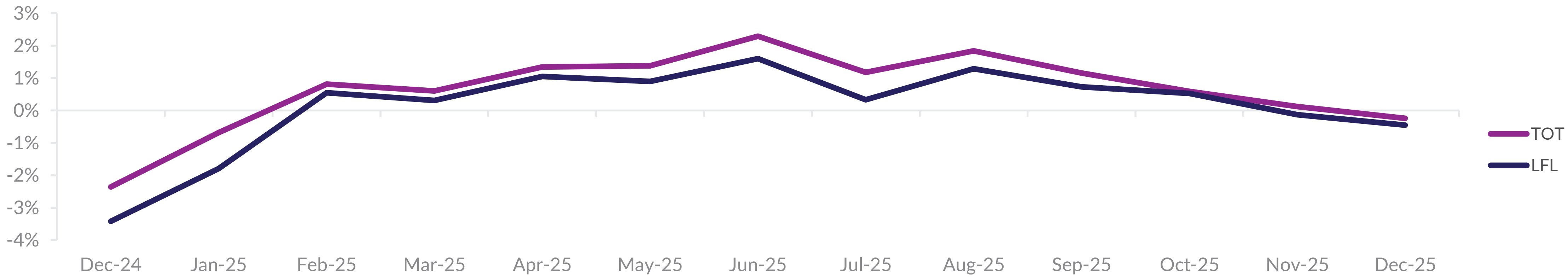
CATEGORY RANKINGS

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

CATEGORY	RANKING UP/DOWN VS NOV-25	DEC-25	NOV-25	DEC-24	3M AVG	12M AVG
Toys & Baby Equipment	▲	1	4	10	1	10
Computing	▲	2	6	1	2	1
Clothing	▲	3	8	7	4	4
Home Accessories	▼	4	3	4	7	8
Health & Beauty	=	5	5	3	3	3
Household Appliances	▼	6	1	5	6	7
Furniture	▼	7	2	6	5	2
Other Non-Food	▲	8	9	2	9	6
Footwear	▲	9	10	8	10	9
House Textiles	▼	10	7	9	8	5

NON-FOOD TRENDS

NON-FOOD STORE 3 MONTHLY AVERAGE RETAIL SALES YEAR-ON-YEAR CHANGE (%)



Source: BRC-KPMG Retail Sales Monitor

METHODOLOGY

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.

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.

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 January 2026 Monitor, covering the 4 weeks from 4 – 31 January 2026, will be released at 00.01am on Tuesday 10 February 2026.

ABOUT US

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 indepth 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, please contact:

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