BRC – KPMG RETAIL SALES MONITOR

MARCH 2025

COVERING THE FIVE WEEKS 02 MARCH – 05 APRIL 2025

GREEN SHOOTS FOR RETAIL SALES

% CHANGE year-on-year	Vs Feb-25's % CHANGE	Total	Like-For-Like
UK Retail Sales	▼	1.1%	0.9%
Food	▼	1.6%	1.4%
Non-Food	▲	0.6%	0.5%
Non-Food – Store	▲	-0.1%	-0.3%
Non-Food – Online	▼	1.8%	n/a

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

Helen Dickinson OBE, Chief Executive | British Retail Consortium

"Despite a challenging global geopolitical landscape, the small increase in both food and non-food sales masked signs of underlying strengthening of demand given March 2025's comparison with last year's early Easter. The improving weather made for a particularly strong final week, with gardening and DIY equipment flying off the shelves. Jewellery and beauty products were helped by Mother's Day, though sales of bigger ticket items like furniture remained weak. Retailers are making final preparations for Easter, with food expected to be the big winner next month.

"Since the start of April, retailers have had to contend with £5 billion pounds of new government-imposed costs as a result of increases to the National Living Wage and National Insurance. This rises to £7bn when the new packaging tax comes into effect in October and will undoubtedly increase inflation later in the year and hold back critical investment in high streets across the country. Government has ample opportunities to kick start that investment by ensuring that no shop pays more as part of their planned reforms to business rates and that the Employment Rights Bill doesn't reduce the availability of entry level and part time jobs. Investment and growth are what the economy needs right now."

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

"As Spring weather arrived, house and garden related purchases and gifts for Mother's Day drove retail sales growth in March.

"Amidst downbeat consumer confidence in the UK's economic outlook, and many households facing rising costs, retail sales growth feels an achievement. But with non-food sales only climbing around 1% on average, competition means there are some retailers really struggling whilst others win, especially online. Retailers will be pushing for higher growth rates as we move toward summer and holiday season, particularly as they are now paying higher wage costs and facing volatility and potential impact on their supply chains due to global tariffs."

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

"Shopper confidence fell from 4 to -2 in March after a brief boost in February. Rising geopolitical uncertainty and the imminent increases in household bills will have contributed to this decline. Year-on-year volume and value sales also dropped, partly due to Easter shifting to mid-April this year.

"While half-term, Bank Holidays, and Easter may temporarily lift sales, the potential negative impact of U.S. tariffs and recession concerns are likely to keep confidence low. We may have already seen the peak for some time."

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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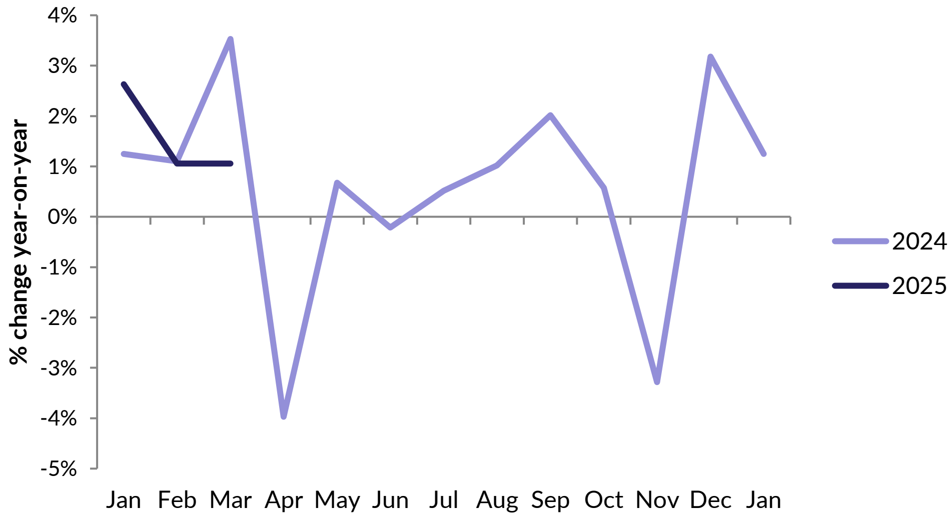
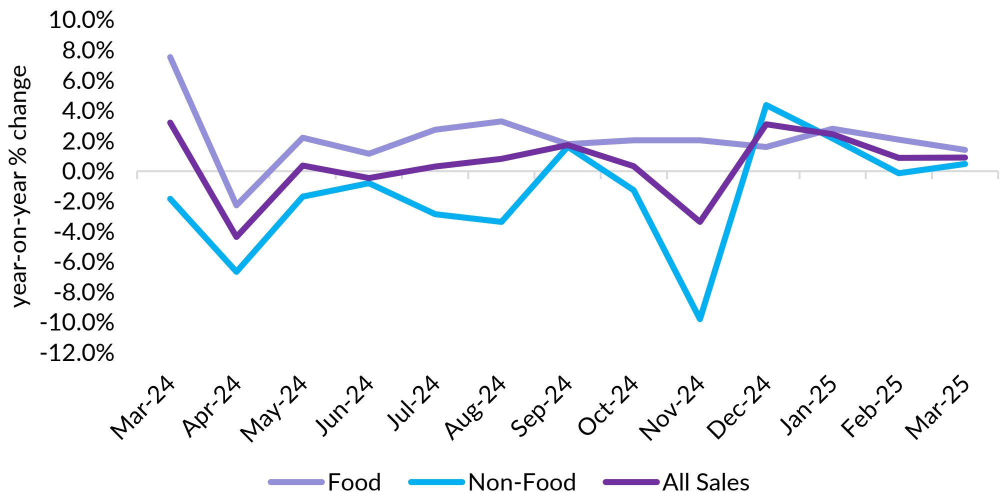
MONTHLY GROWTH OF TOTAL RETAIL SALES



	LFL	TOTAL
Mar-25	0.9%	1.1%
Mar-24	3.2%	3.5%
Feb-25	0.9%	1.1%
3m avg	1.5%	1.6%
12m avg	0.4%	0.6%

Source: BRC-KPMG RETAIL SALES MONITOR (Includes Food data from IGD)

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



MONTHLY AVERAGE	LFL	TOTAL
Food	1.4%	1.6%
Non-food	0.5%	0.6%
All Sales	0.9%	1.1%

Source: BRC-KPMG RETAIL SALES MONITOR (Includes additional Food data from IGD)

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

OVERVIEW

March saw an increase in Total sales YOY, with Food up 1.6% and Non-Food growing 0.6%. The impact of Easter timing resulted in a strong performance in Food during the last week of the month, however, this was on the back of the post-Easter lull in the same week last year, when sales saw a significant decline. Non-Food Online sales rose 1.8% in March compared with the same month last year, while Non-Food Store sales decreased by 0.1%. The Online penetration rate for Non-Food increased to 37.1%, compared with 36.6% in March 2024.

Retailers reported sales of handbags, beauty products and candles helped boost sales in the run up to Mother's Day, while the improved weather helped drive sales for gardening and DIY retailers as consumers looked to spruce up their gardens in preparation for summer. Health & Beauty, Jewellery & Watches, DIY & Gardening and Computing were the strongest performing categories, while higher-ticket items such as Furniture and Household Appliances continue to fare less well.

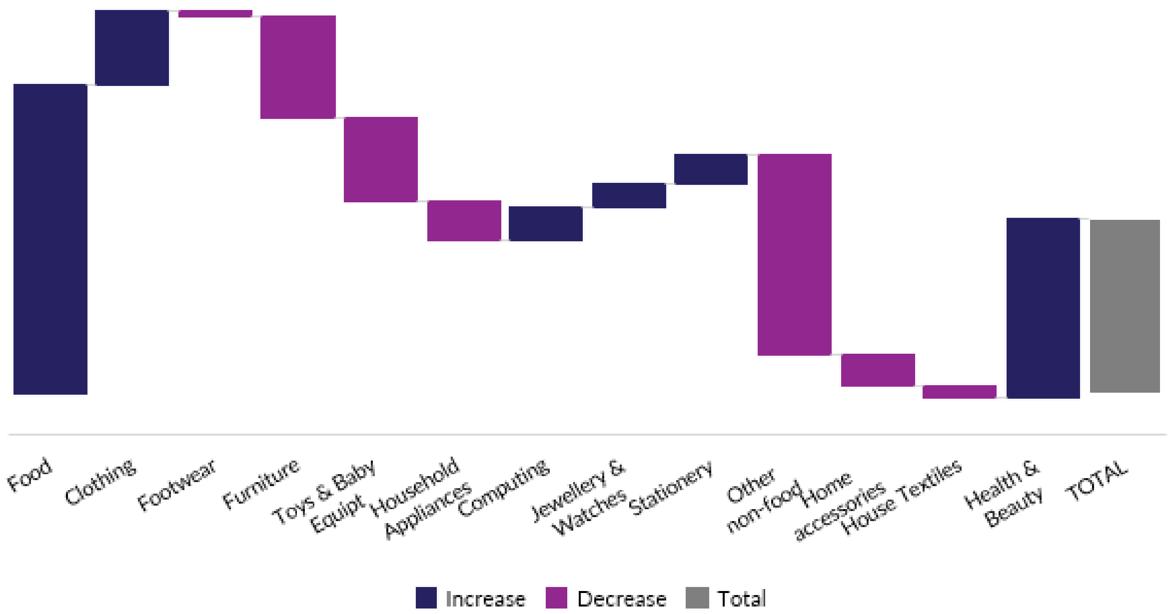
While the Total market growth is positive news for retailers, consumer confidence in the economy remains low. However, our latest Consumer Sentiment Monitor reveals an increase in consumer spending expectations over the coming months. This is good news for retailers, who are looking for stronger sales as we approach the summer season.

Tina Spooner, Strategic Insight Manager

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

MARCH: CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



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

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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BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

MONTHLY RETAIL SALES:
% 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%		
May	3.7%	3.9%	0.4%	0.7%		
June	4.2%	4.9%	-0.5%	-0.2%		
July	1.8%	1.5%	0.3%	0.5%		
August	4.3%	4.1%	0.8%	1.0%		
September	2.8%	2.7%	1.7%	2.0%		
October	2.6%	2.5%	0.3%	0.6%		
November	2.6%	2.7%	-3.4%	-3.3%		
December	1.9%	1.7%	3.1%	3.2%		
Jan-Mar average	4.4%	4.7%	1.2%	1.2%	1.4%	1.6%
Jan-Dec average	3.6%	3.6%	0.5%	0.7%		

Source: BRC-KPMG RETAIL SALES MONITOR (Includes Food data from IGD)

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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

MONTHLY AVERAGE	LIKE-FOR-LIKE			TOTAL		
	Food	**Non-Food**	**All Sales**	**Food**	**Non-Food**	**All Sales**
Mar 2024	7.5%	-1.8%	3.2%	8.3%	-0.4%	3.5%
Apr	-2.3%	-6.7%	-4.4%	-1.6%	-6.0%	-4.0%
May	2.2%	-1.7%	0.4%	2.8%	-1.1%	0.7%
Jun	1.2%	-0.8%	-0.5%	1.8%	-1.9%	-0.2%
Jul	2.8%	-2.8%	0.3%	3.3%	-1.8%	0.5%
Aug	3.3%	-3.3%	0.8%	3.9%	-1.4%	1.0%
Sep	1.8%	1.6%	1.7%	2.3%	1.7%	2.0%
Oct	2.0%	-1.3%	0.3%	2.6%	-1.1%	0.6%
Nov	2.0%	-9.8%	-3.4%	2.2%	-7.9%	-3.3%
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 2025	1.4%	0.5%	0.9%	1.6%	0.6%	1.1%

Source: BRC-KPMG RETAIL SALES MONITOR (Includes Food data from IGD)

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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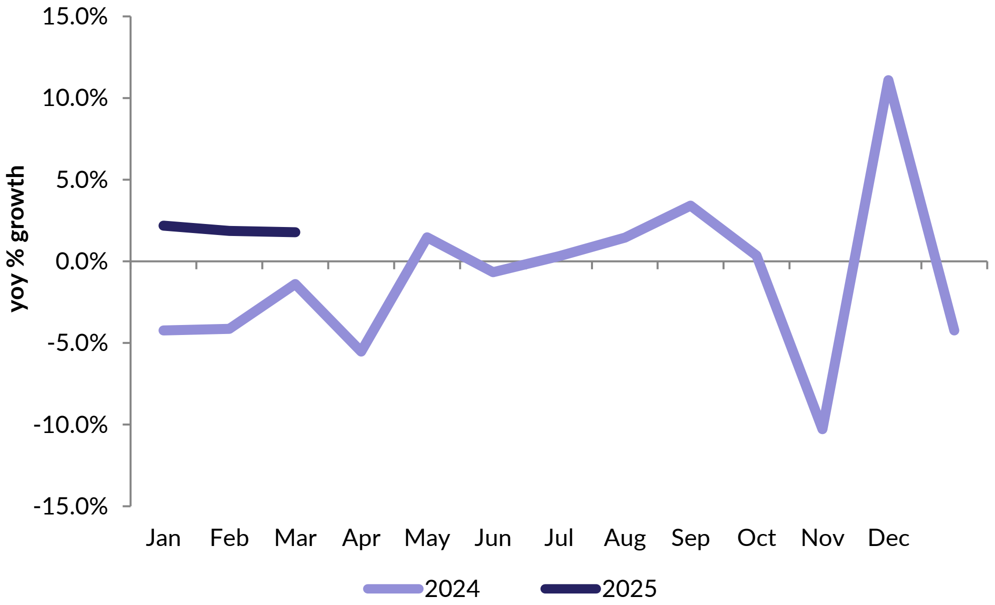
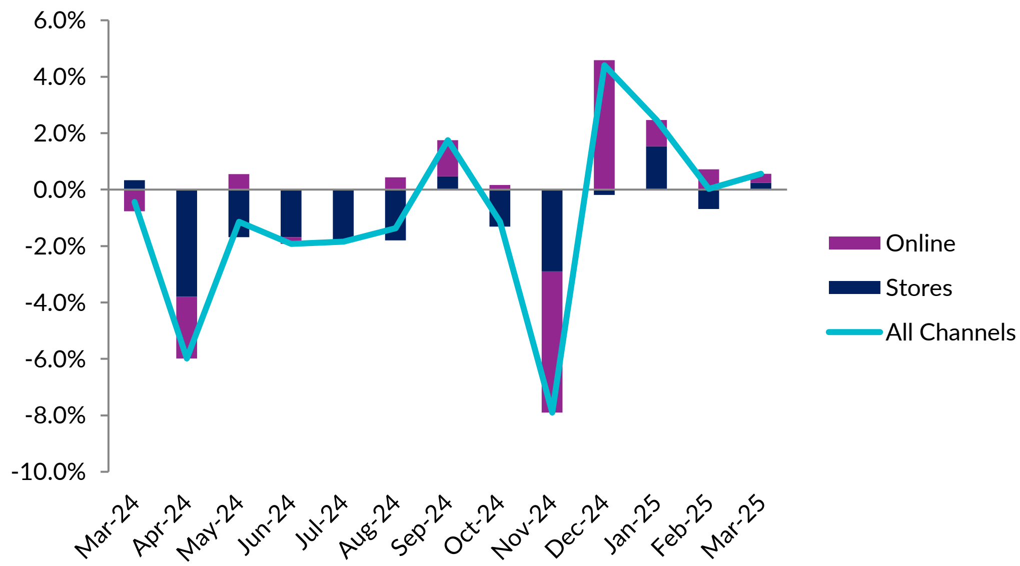
ONLINE SALES GROWTH (NON-FOOD):
% CHANGE YEAR-ON-YEAR



NON-FOOD GROWTH	ONLINE*	UK TOTAL
Mar-25	1.8%	0.5%
Mar-24	-1.4%	-1.8%
Feb-25	1.9%	-0.1%
3m avg	1.9%	1.1%
12m avg	0.9%	-0.8%

Source: BRC-KPMG RETAIL SALES MONITOR: **Online**: online sales of non-food goods (including mail and phone orders)

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



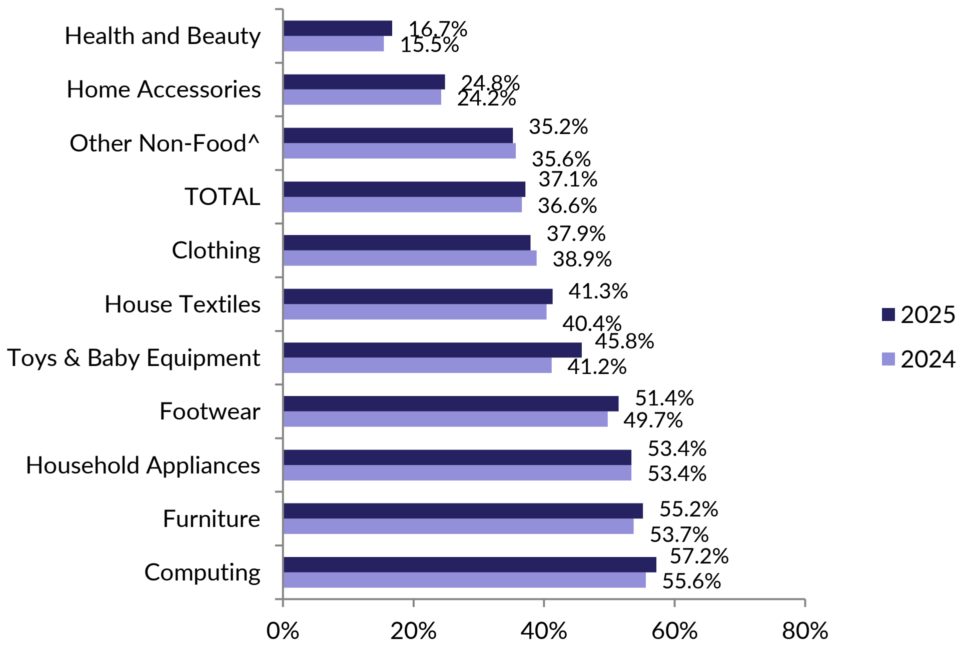
NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR		
	LFL	TOTAL
Mar-25	-0.3%	-0.1%
Mar-24	-2.1%	0.1%
Feb-25	-1.3%	-1.0%
3m avg	0.3%	0.6%

Source: BRC-KPMG RETAIL SALES MONITOR

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

Monthly: Online Penetration rankings by category



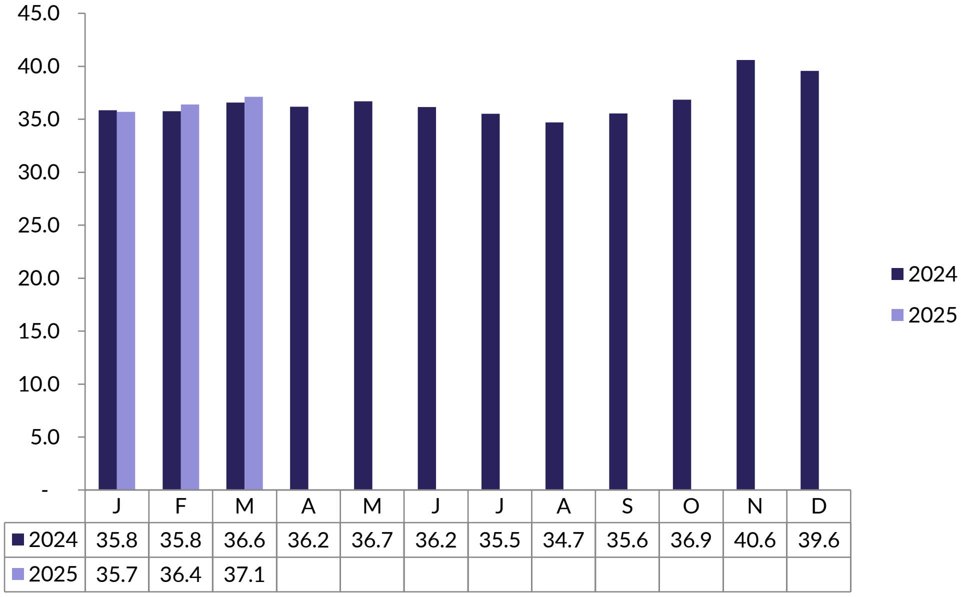
Source: BRC-KPMG RETAIL SALES MONITOR

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

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

TOTAL NON-FOOD SALES: WEIGHTED ONLINE PENETRATION



NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
Mar-25	37.1%
Mar-24	36.6%
Feb-25	36.4%
3m average	36.4%
12m average	36.8%

Source: BRC-KPMG RETAIL SALES MONITOR

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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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 AVG*	MONTHLY	3M AVG	MONTHLY	3M AVG
Mar 2024	-1.4%	-3.1%	36.6%	36.1%	-0.8%	-1.5%
Apr	-5.5%	-3.5%	36.2%	36.2%	-2.2%	-1.6%
May	1.5%	-1.8%	36.7%	36.5%	0.6%	-0.8%
Jun	-0.7%	-1.5%	36.2%	36.3%	-0.2%	-0.6%
Jul	0.3%	0.3%	35.5%	36.1%	-0.1%	0.1%
Aug	1.5%	0.3%	34.7%	35.5%	0.4%	0.0%
Sep	3.4%	1.9%	35.6%	35.3%	1.3%	0.6%
Oct	0.4%	1.9%	36.9%	35.7%	0.2%	0.7%
Nov	-10.3%	-1.7%	40.6%	37.5%	-5.0%	-1.0%
Dec	11.1%	1.2%	39.6%	39.1%	4.6%	0.3%
Jan	2.2%	1.8%	35.7%	38.5%	0.9%	0.5%
Feb	1.9%	5.3%	36.4%	37.3%	0.7%	2.2%
Mar 2025	1.8%	1.9%	37.1%	36.4%	0.3%	0.7%

Source: BRC-KPMG Retail Sales Monitor.

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

MONTH	TOTAL % CHANGE YOY	LFL % CHANGE YOY
Mar 2024	0.1%	-2.1%
Apr	-6.2%	-7.3%
May	-2.6%	-3.5%
Jun	-2.6%	-0.9%
Jul	-3.0%	-4.5%
Aug	-2.8%	-5.8%
Sep	0.8%	0.6%
Oct	-2.0%	-2.2%
Nov	-6.2%	-9.4%
Dec	0.4%	0.4%
Jan	2.6%	2.1%
Feb	-1.0%	-1.3%
Mar 2025	-0.1%	-0.3%

Source: BRC-KPMG Retail Sales Monitor

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

Covering the five weeks 02 March – 05 April 2025

SECTOR PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

CATEGORY	Ranking Up/Down vs Feb-25	GROWTH RANKINGS				
		MAR-25	FEB-25	MAR-24	3M AVG	12M AVG
Health & Beauty	▲	1	2	2	2	2
Computing	▲	2	1	5	1	1
Footwear	▲	3	8	9	5	6
House Textiles	▲	4	3	4	3	3
Clothing	▼	5	10	6	10	7
Home Accessories	▼	6	9	1	9	5
Toys & Baby Equipment	▼	7	6	3	4	4
Furniture	▼	8	5	7	7	8
Other Non-Food	▼	9	7	10	8	10
Household Appliances	▼	10	4	8	6	9

Source: BRC-KPMG RETAIL SALES MONITOR

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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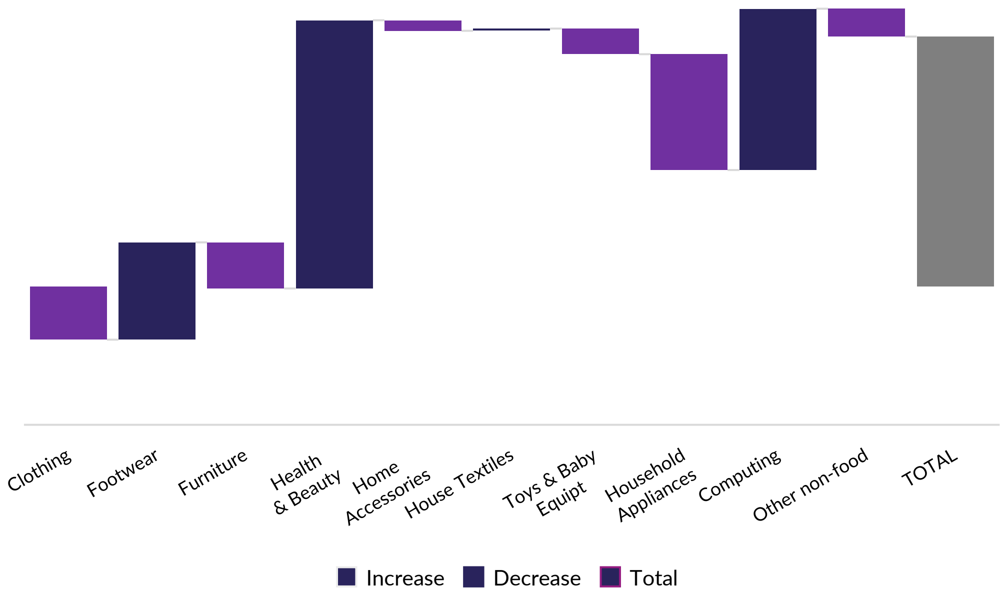
MONTHLY: CONTRIBUTION TO NON-FOOD ONLINE SALES GROWTH BY CATEGORY



Source: BRC-KPMG RETAIL SALES MONITOR

BRC – KPMG RETAIL SALES MONITOR MARCH 2025

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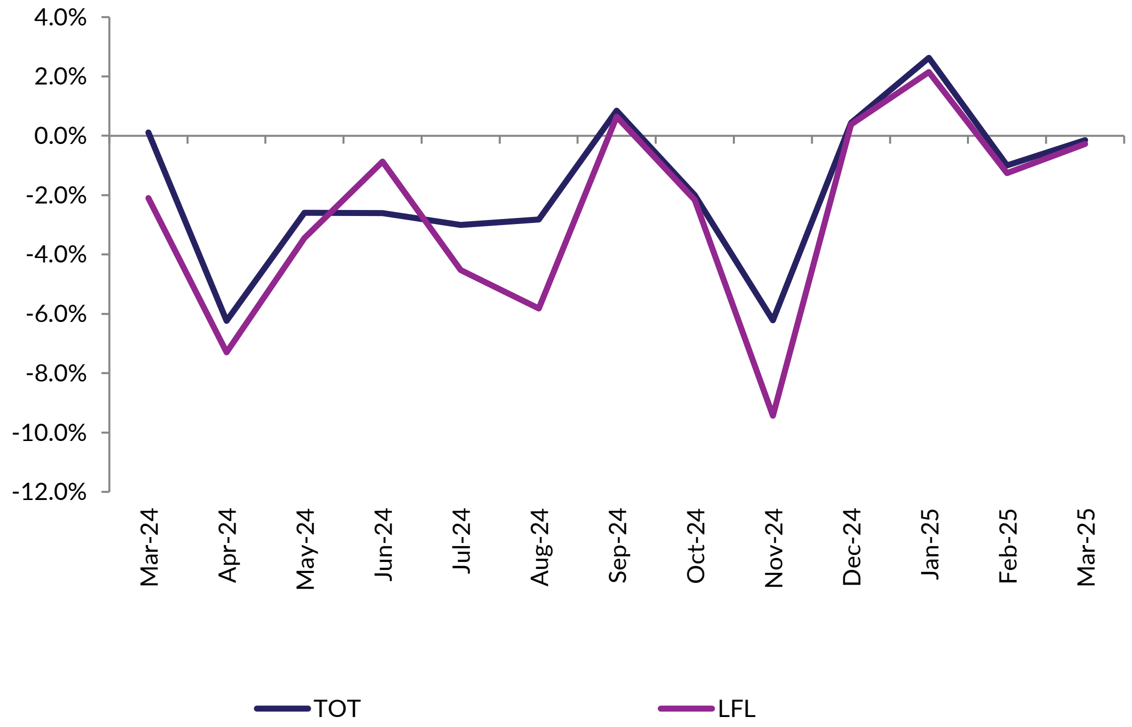
SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

CATEGORY	Ranking Up/Down vs Feb-25	GROWTH RANKINGS				
		MAR-25	FEB-25	MAR-24	3M AVG	12M AVG
Health & Beauty	▲	1	3	1	2	1
Clothing	▲	2	6	5	3	5
Computing	▲	3	1	8	1	2
Other Non-Food	▼	4	7	10	8	8
Footwear	▼	5	9	6	7	7
House Textiles	▼	6	5	3	5	4
Home Accessories	▼	7	8	2	6	3
Household Appliances	▼	8	4	9	9	9
Furniture	▼	9	2	7	4	6
Toys & Baby Equipment	▼	10	10	4	10	10

Source: BRC-KPMG RETAIL SALES MONITOR

Covering the five weeks 02 March – 05 April 2025

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



Source: BRC-KPMG RETAIL SALES MONITOR

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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. 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 April 2025 Monitor, covering the 4 weeks 06 April – 03 May 2025, will be released at 00.01am on Tuesday 13 May 2025. 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.

SPONSORED AND ADMINISTERED BY

KPMG LLP, a UK limited liability partnership, operates from 22 offices across the UK with approximately 16,300 partners and staff. The UK firm recorded a revenue of £2.338 billion in the year ended 30 October 2018. KPMG is a global network of professional firms providing Audit, Tax, and Advisory services. It operates in 154 countries and has 200,000 professionals working in member firms around the world. The independent member firms of the KPMG network are affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity. Each KPMG firm is a legally distinct and separate entity and describes itself as such.

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, please contact:
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