



RETAIL SALES MONITOR

| Pre-Budget jitters dampen Black Friday sales

November 2025

Covering the 4 weeks 2 - 29 November 2025



% CHANGE YOY	CHANGE VS OCT-2025	TOTAL	LIKE-FOR-LIKE
UK Retail Sales	▼	1.4%	1.2%
Food	▼	3.0%	2.8%
Non-Food	▲	0.1%	-0.2%
Non-Food - Store	▼	-0.3%	-0.8%
Non-Food - Online	▲	0.5%	N/A

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HEADLINE COMMENTARY



Helen Dickinson OBE

Chief Executive | British Retail Consortium

"Pre-Budget jitters among shoppers meant the month of Black Friday did not deliver as retailers had hoped or the economy needed. Sales growth was muted, despite Black Friday itself being in this year's reporting window, unlike last year. Not unexpectedly, online dominated, with the proportion of non-food bought online reaching its highest level since 2022. Many consumers took advantage of promotions, with homeware and upholstery selling well ahead of festive hosting. Fashion lagged, especially with the mild first half of November dampening demand for winterwear."

"Retailers continue to invest in Christmas offerings, building up stock levels, and promoting festive products. It has been a difficult year as retailers grappled with ever-rising cost pressures. Looking ahead to 2026, it is time public policy started prioritising measures to revive consumer confidence and keep costs of doing business down so retailers can focus on growth strategies to maximise their contribution to economic recovery."



Linda Ellett

UK Head of Consumer, Retail & Leisure | KPMG

"November delivered some growth in retail sales, but many retailers will be disappointed that Black Friday period promotions failed to deliver the bigger boost that they were hoping for. While the likes of computing and household appliances outperformed Black Friday week last year, total non-food sales growth across all categories was minimal overall."

"Rising household costs and nervousness about the economy continue to impact discretionary buying. But retailers will be hoping that Budget clarity has now provided more certainty for consumers about their ability to spend in the months ahead. And as the Christmas decorations go up, hopefully retail sales growth does too, ending 2025 with some festive cheer for the sector."



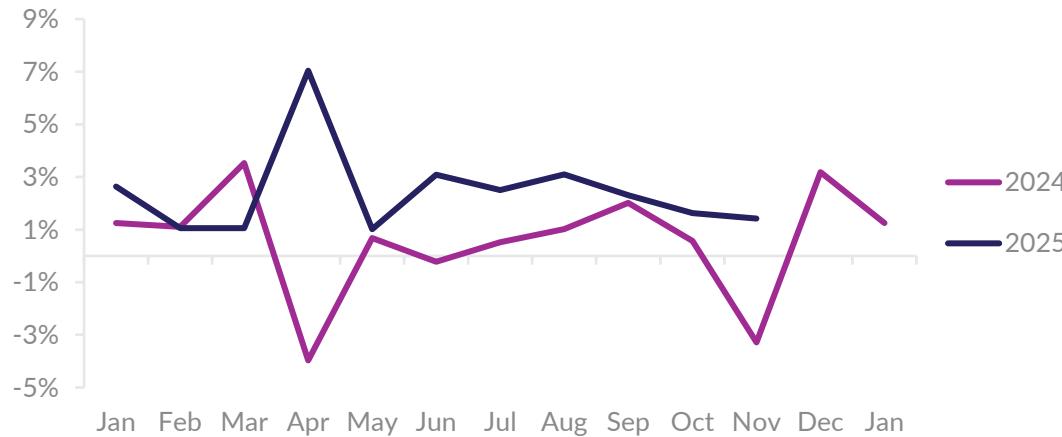
Sarah Bradbury

Food & Drink sector performance, CEO | IGD

"Confidence remains fragile following the Budget, with the away-from-home market most exposed to reduced demand. In the run-up to Christmas, shoppers are expected to make selective trade-ups, balancing affordability with indulgence. Retailers that combine strong value with premium options will be best placed to win. As January arrives, expect a pullback on discretionary spending alongside a renewed focus on healthier choices."

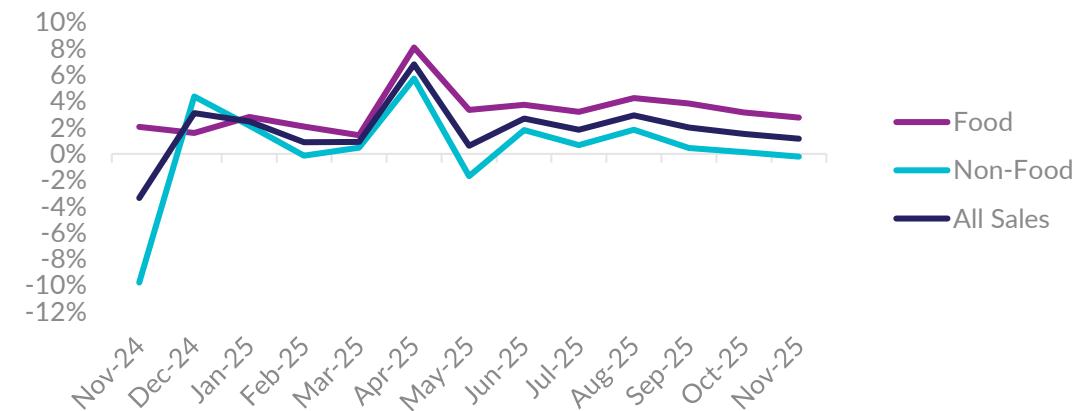
RETAIL SALES TRENDS

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
Nov-25	1.2%	1.4%
Nov-24	-3.4%	-3.3%
Oct-25	1.5%	1.6%
3m avg	1.6%	1.8%
12m avg	2.2%	2.5%

MONTHLY AVERAGE	LFL	TOTAL
Food	2.8%	3.0%
Non-food	-0.2%	0.1%
All Sales	1.2%	1.4%

OVERVIEW

In November, total sales increased by 1.4% YoY, comprising a 3.0% uplift in Food and a 0.1% rise in Non-Food. Within the Non-Food category, In-store sales fell by 0.3% YoY, while Online sales were up by 0.5%. This Black Friday bias towards the online channel was reflected in Non-Food online penetration hitting a high of 44%.

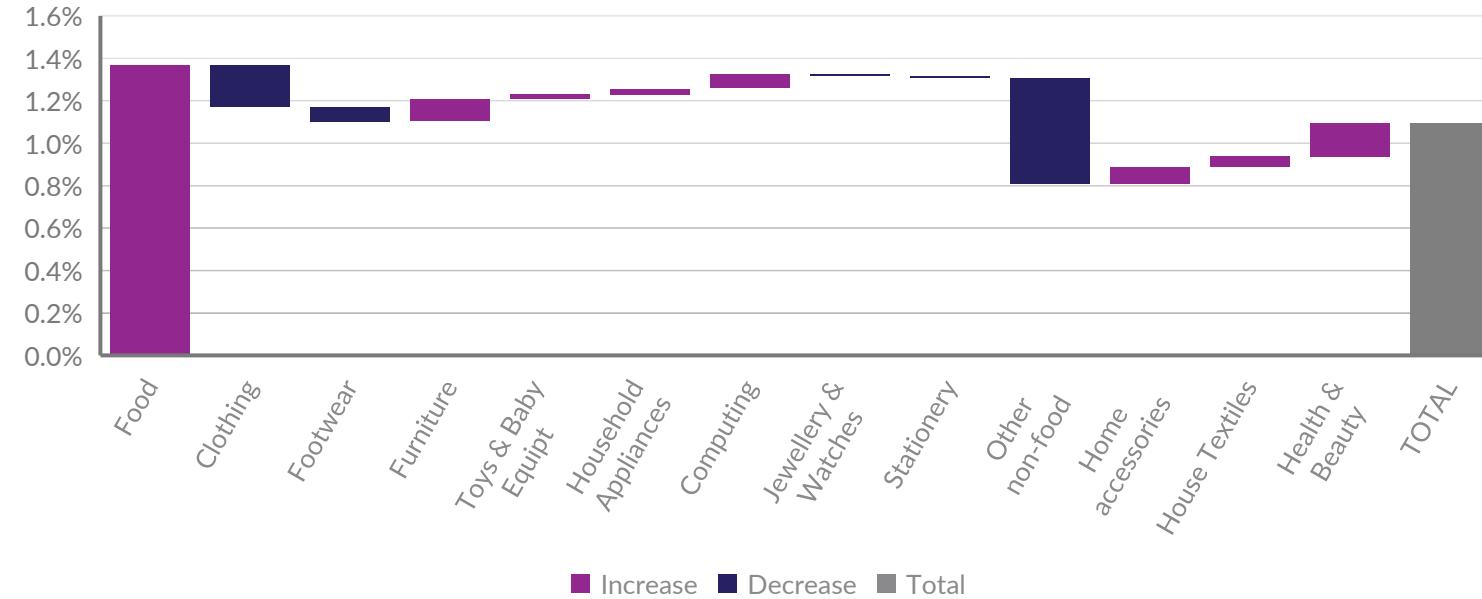
This report covers the four weeks of 2-29 November, which is a clean comparison of Black Friday sales in 2025 versus 2024.

Once again, Food inflation is supporting increased sales value. Non-Food categories were sluggish, with Clothing and Footwear slightly negative. Following an unseasonably mild first half of November in many areas, consumers remain slow to buy into new winter fashion ranges.

Ian Bendelow

Senior Analyst

NOVEMBER 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%		
Jan-Nov average	3.7%	3.8%	0.1%	0.3%	2.2%	2.4%
Jan-Dec average	3.6%	3.6%	0.3%	0.5%		

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

6 | BRC - KPMG Retail Sales Monitor



MONTHLY SALES TRENDS

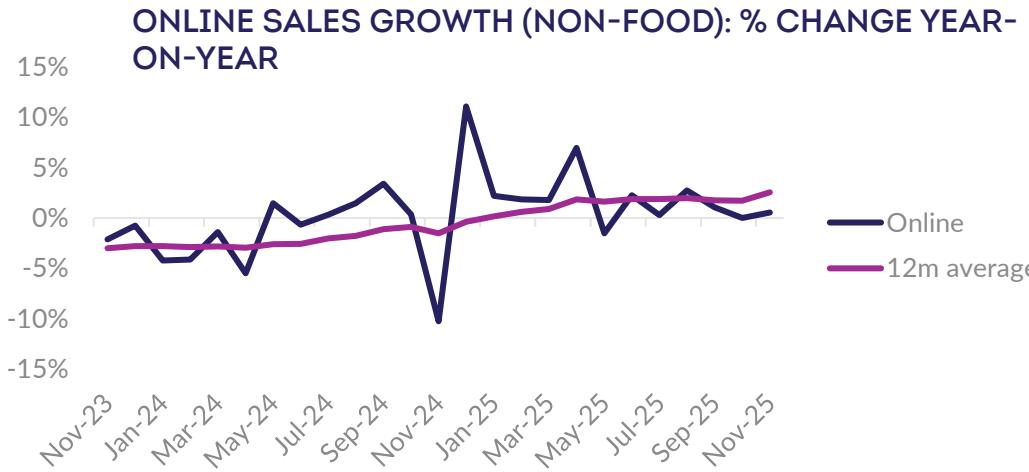
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

MONTHLY AVERAGE	LFL			TOTAL		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2024 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	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%
2025 Nov	2.8%	-0.2%	1.2%	3.0%	0.1%	1.4%

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

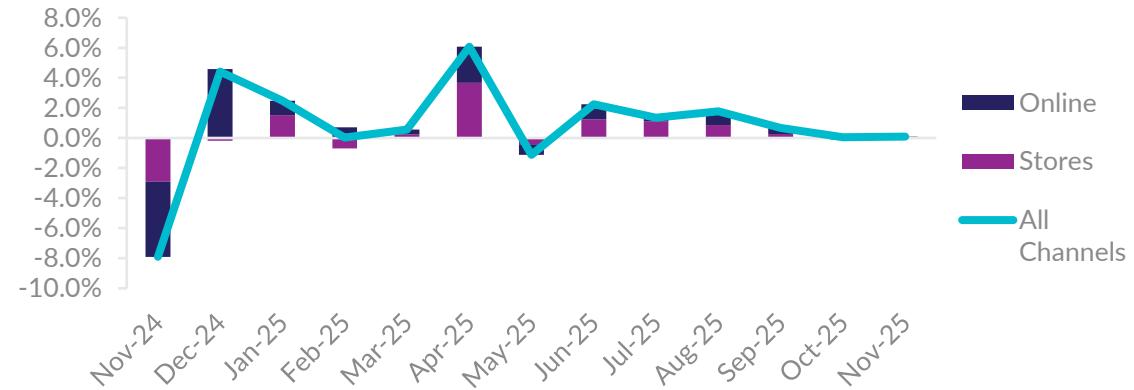


ONLINE VS IN-STORE



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



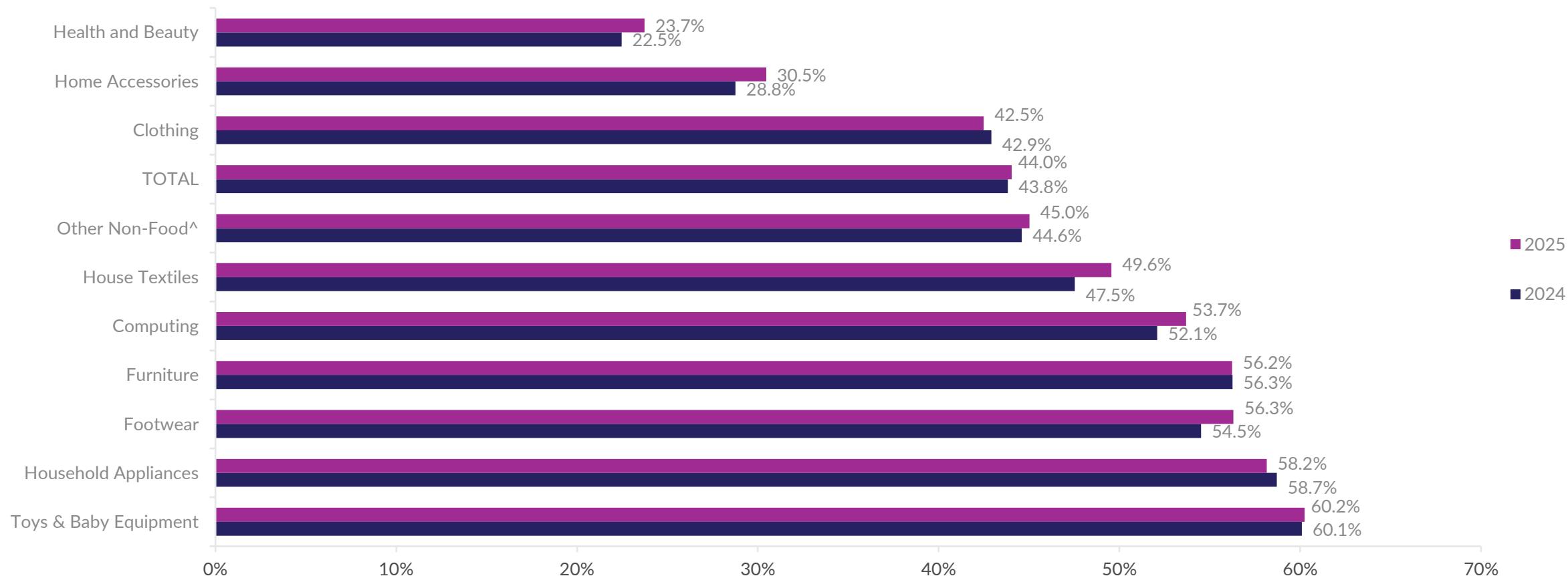
Source: BRC-KPMG Retail Sales Monitor

NON-FOOD GROWTH	ONLINE	UK TOTAL
Nov-25	0.5%	0.1%
Nov-24	-10.3%	-7.9%
Oct-25	0.0%	0.1%
3m avg	0.6%	0.3%
12m avg	2.5%	1.6%

NON-FOOD INSTORE	LFL	Total
Nov-25	-0.8%	-0.3%
Nov-24	-9.4%	-6.2%
Oct-25	0.2%	0.1%
3m avg	-0.1%	0.1%
12m avg	0.6%	1.0%

ONLINE VS IN-STORE

NOVEMBER: ONLINE PENETRATION RANKINGS BY CATEGORY

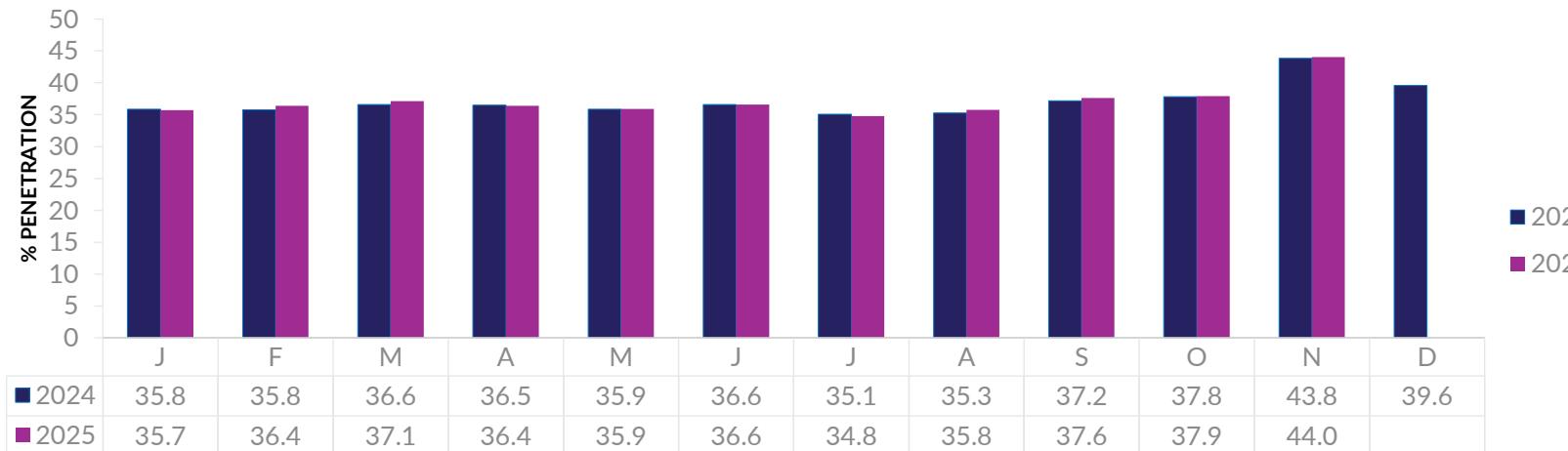


Source: BRC-KPMG Retail Sales Monitor

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



Source: BRC-KPMG Retail Sales Monitor

NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL

Nov-25	44.0%
Nov-24	43.8%
Oct-25	37.9%
3m average	39.7%
12m average	37.3%

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
Nov 2024	-10.3%	-1.7%	43.8%	39.4%	-5.0%	-1.0%
Dec	11.1%	1.2%	39.6%	40.3%	4.6%	0.3%
Jan	2.2%	1.8%	35.7%	39.4%	0.9%	0.5%
Feb	1.9%	5.3%	36.4%	37.3%	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 2025	0.5%	0.6%	44.0%	39.7%	0.1%	0.1%

Source: BRC-KPMG Retail Sales Monitor.

Online vs In-Store

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

MONTH	TOTAL	LFL
Nov 2024	-6.2%	-9.4%
Dec	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 2025	-0.3%	-0.8%

Source: BRC-KPMG Retail Sales Monitor



CATEGORY RANKINGS

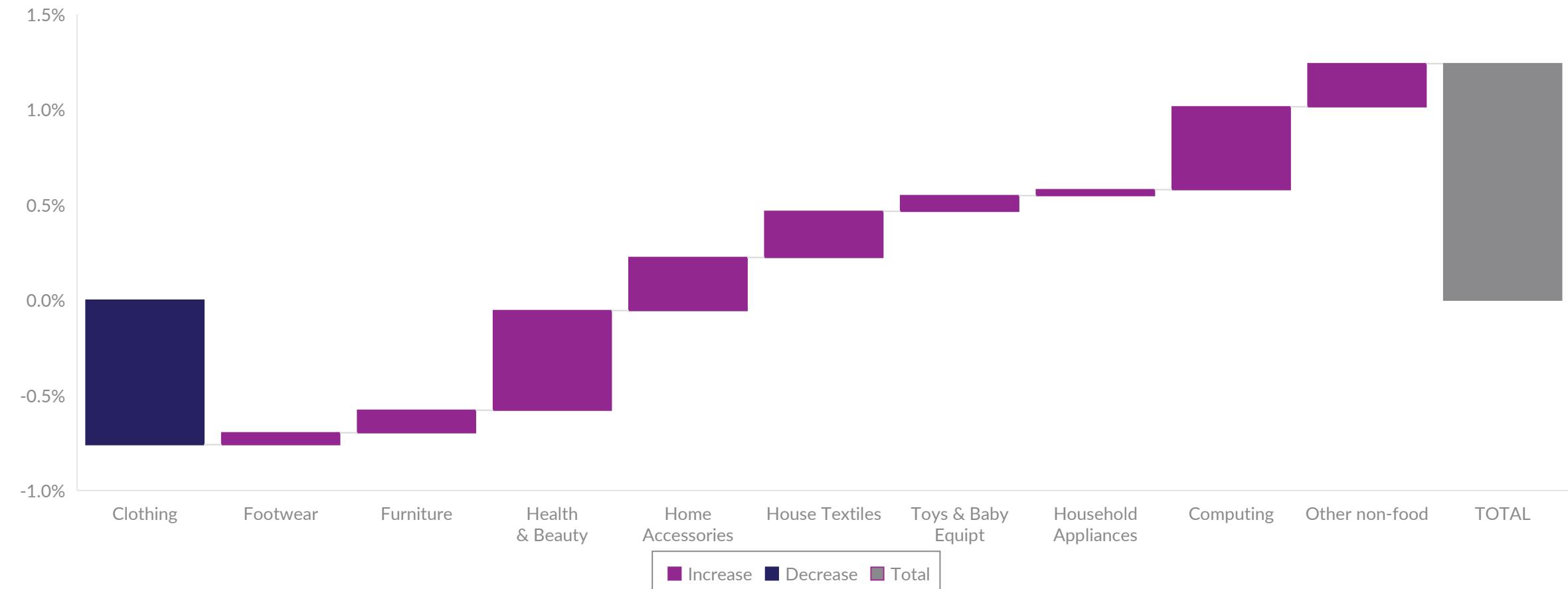
CATEGORY PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

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

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

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



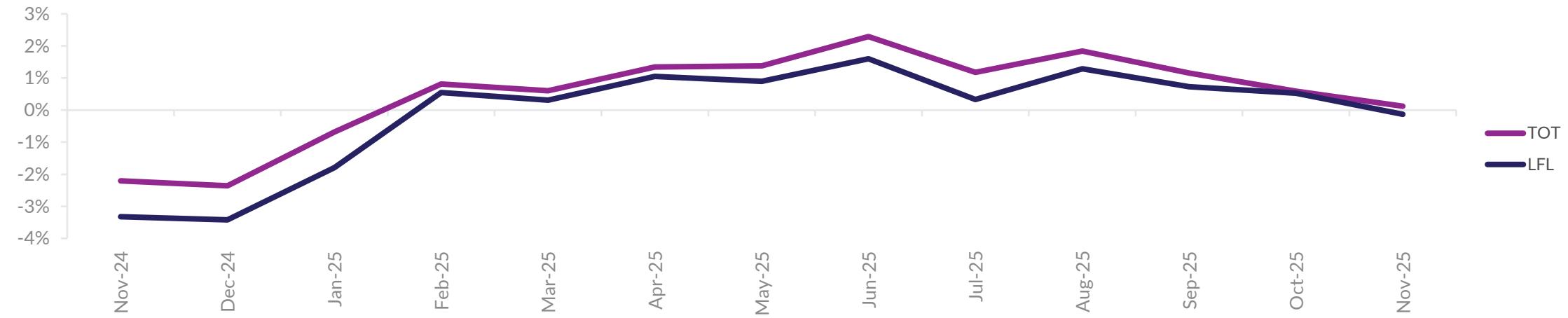
CATEGORY RANKINGS

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

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

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. 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 2025 Monitor, covering the 5 weeks from 30 November 2025 to 3 January 2026, will be released at 00.01am on Tuesday 13 January 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 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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