RETAIL SALES MONITOR

Consumer demand cools as temperatures soar

July 2026

Covering the 4 weeks from 5 July - 1 August 2026

% CHANGE YOY	TOTAL SALES CHANGE VS JUN-2026	TOTAL	LIKE-FOR-LIKE
UK Retail Sales	▼	1.3%	1.0%
Food	▲	3.8%	3.2%
Non-Food	▼	-0.7%	-0.8%
Non-Food – Store	▼	-1.9%	-2.0%
Non-Food – Online	▼	1.3%	N/A

HEADLINE COMMENTARY

Helen Dickinson OBE
Chief Executive | British Retail Consortium

"July saw modest sales growth, with food sales boosted by the final week of the World Cup. Non-food sales were hit by the decline in footfall as shoppers avoided the heat. Clothing was a bright spot, driven by demand for affordable summer essentials, while footwear struggled to keep up. Shoppers also prioritised smaller indulgences such as beauty products and fashion jewellery, while delaying bigger-ticket purchases including furniture and computing.

"Consumer demand has struggled in the heat, leaving retailers facing a challenging start to the second half of the year. Household budgets remain stretched, consumer confidence is fragile, and retailers continue to grapple with rising operating costs. If the Government wants to drive growth and keep inflation under control, it must reduce the cost of doing business by tackling the taxes and regulatory burdens that are holding back investment and putting upward pressure on prices. These include business rates, new packaging taxes, and the rising costs of employment."

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

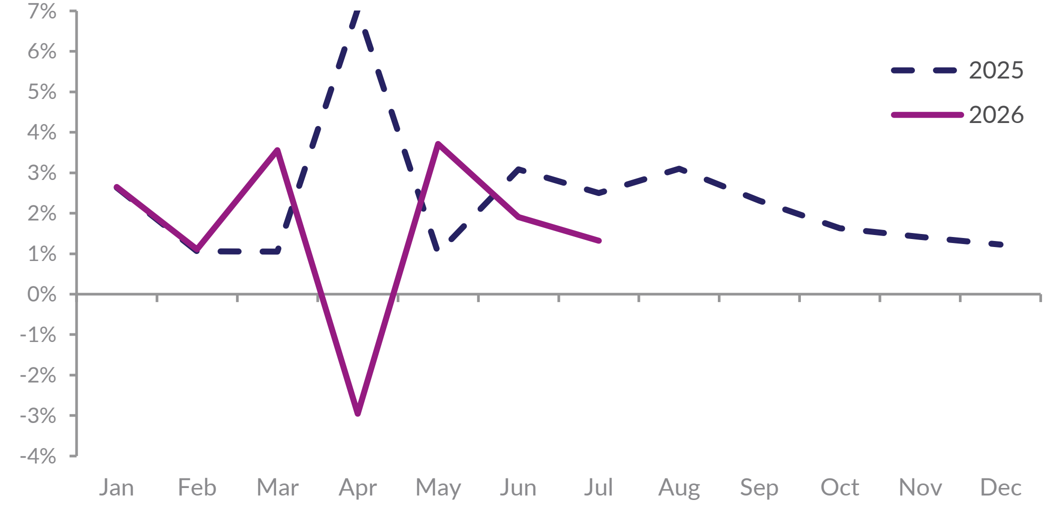
"Despite summer season getting started as early as May, the upturn for clothes, shoes and accessories has continued right through to August. The prolonged warm weather has also aided home entertaining and garden related purchases and, coupled with England's progress to the tail-end of the World Cup, brought a boost to food and drink sales in July.

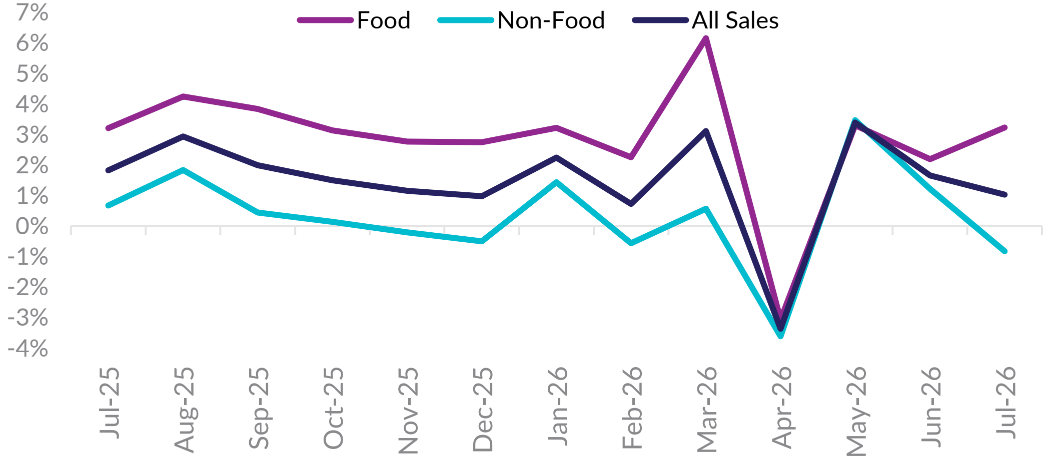
"With spend focussed on summer related purchasing, other non-food categories fared less well - limiting total non-food sales growth overall."

Sarah Bradbury
Food & Drink sector performance, CEO | IGD

"July brought a welcome uplift in shopper confidence. Easing inflation, a new government, continued warm weather and England's World Cup run helped boost sentiment with sales and volumes increasing compared to July 2025. However, while shoppers are feeling more positive than earlier in the year, many households remain mindful of their budgets, meaning value continues to play a central role in purchasing decisions. Despite this month's improvement, pressures are building across the food supply chain as a result of the conflict in the Middle East and prolonged hot weather, increasing the likelihood of higher food costs and renewed pressure on household budgets as we move into the autumn."

JULY SALES TICK DOWN, BUT FOOD HOLDS UP WELL





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

YOY	LFL	TOTAL
Jul-26	1.0%	1.3%
Jul-25	1.8%	2.5%
Jun-26	1.7%	1.9%
3m avg	2.0%	2.3%
12m avg	1.5%	1.8%

MONTHLY AVERAGE	LFL	TOTAL
Food	3.2%	3.8%
Non-food	-0.8%	-0.7%
All Sales	1.0%	1.3%

CLOTHING AND HEALTH & BEAUTY SURGE

The extraordinary summer heatwave eased in July, especially in Scotland, Northern Ireland and the North of England. This brought some consumers back to physical shops and provided a welcome change for many retailers. Online Non-Foods growth was stronger than in stores, but the gap between the channels narrowed, after a scorching May and June.

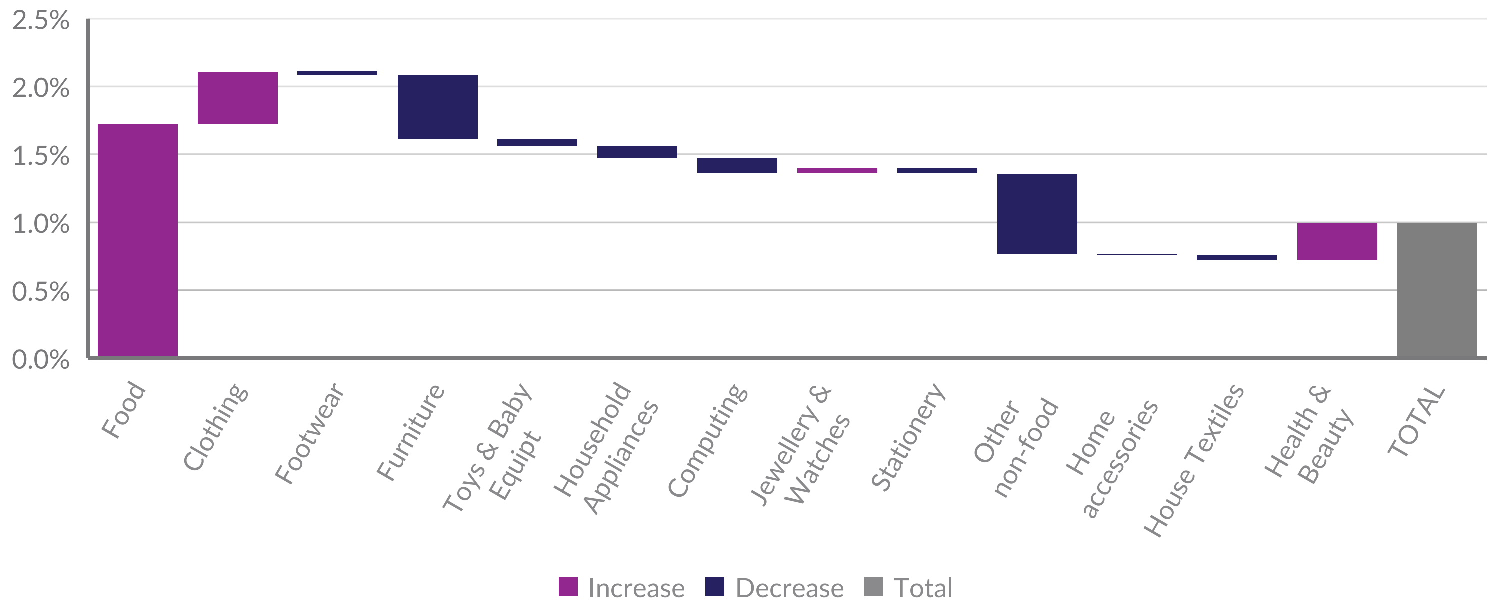
Total sales increased 1.3% year-on-year. Food was up 3.8% and Non-Food sales decreased by 0.7%, with online penetration falling back to 35.9%.

The last two weeks of the Men's Football World Cup gave Food & Beverage and Television sales a boost. Clothing did well as consumers were still buying into Summer seasonal ranges. Health & Beauty and Jewellery & Watches prospered, despite weak consumer confidence. This is likely due to people enjoying small treats, when larger indulgences are less affordable. Household Appliances growth dropped sharply; the huge run on fans and air conditioning eased as consumer demand was largely fulfilled and many retailers were running low on stock.

Ian Bendelow

Senior Analyst

JULY 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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MODEST SALES AS HOT WEATHER STARTS TO RECEDE

RETAIL SALES MONTHLY % CHANGE YEAR-ON-YEAR

MONTH	2024		2025		2026	
	LFL	Total	LFL	Total	LFL	Total
January	1.4%	1.2%	2.5%	2.6%	2.3%	2.7%
February	1.0%	1.1%	0.9%	1.1%	0.7%	1.1%
March	3.2%	3.5%	0.9%	1.1%	3.1%	3.6%
April	-4.4%	-4.0%	6.8%	7.0%	-3.4%	-3.0%
May	0.4%	0.7%	0.6%	1.0%	3.4%	3.7%
June	-0.5%	-0.2%	2.7%	3.1%	1.7%	1.9%
July	0.3%	0.5%	1.8%	2.5%	1.0%	1.3%
August	0.8%	1.0%	2.9%	3.1%		
September	1.7%	2.0%	2.0%	2.3%		
October	0.3%	0.6%	1.5%	1.6%		
November	-3.4%	-3.3%	1.2%	1.4%		
December	3.1%	3.2%	1.0%	1.2%		
Jan-Jul average	0.2%	0.4%	2.3%	2.6%	1.3%	1.6%
Jan-Dec average	0.3%	0.5%	2.1%	2.3%		

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

FOOD IN GROWTH, BUT STORE SALES HOLD NON-FOODS BACK

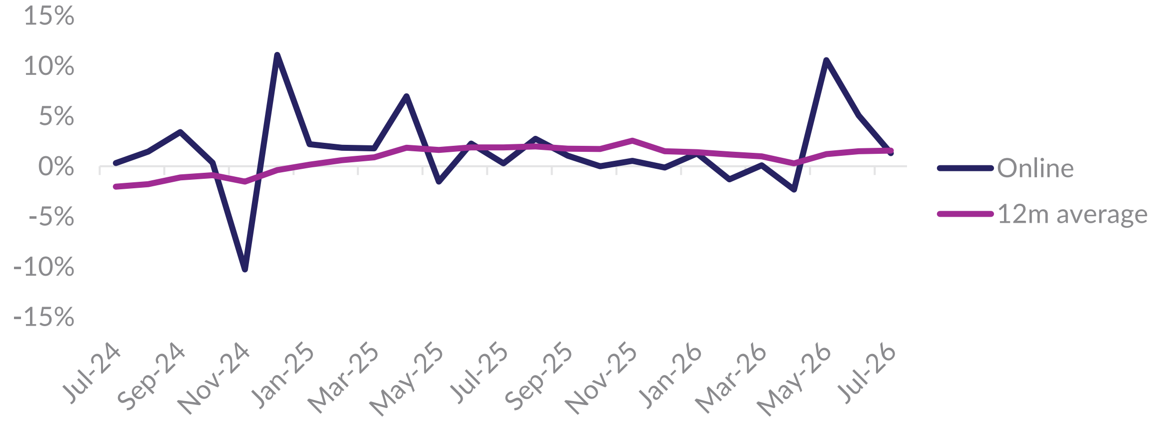
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

MONTHLY AVERAGE	LFL			TOTAL		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2025 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%
Dec	2.7%	-0.5%	1.0%	3.1%	-0.3%	1.2%
Jan	3.2%	1.4%	2.3%	3.8%	1.7%	2.7%
Feb	2.3%	-0.6%	0.7%	2.9%	-0.4%	1.1%
Mar	6.2%	0.6%	3.1%	6.8%	0.9%	3.6%
Apr	-3.1%	-3.6%	-3.4%	-2.5%	-3.3%	-3.0%
May	3.3%	3.5%	3.4%	3.9%	3.5%	3.7%
Jun	2.2%	1.2%	1.7%	2.8%	1.2%	1.9%
2026 Jul	3.2%	-0.8%	1.0%	3.8%	-0.7%	1.3%

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

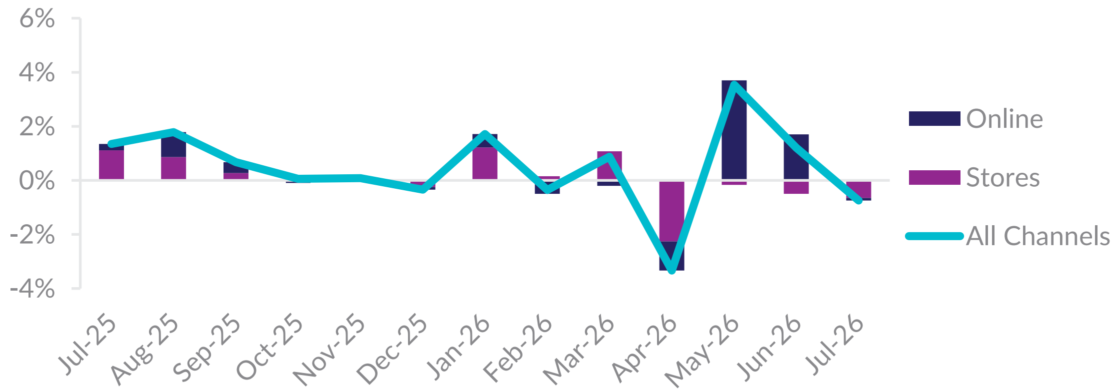
NON-FOOD ONLINE YOY SALES SHOW A SMALL GROWTH

ONLINE SALES GROWTH (NON-FOOD): % CHANGE YOY



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 YOY



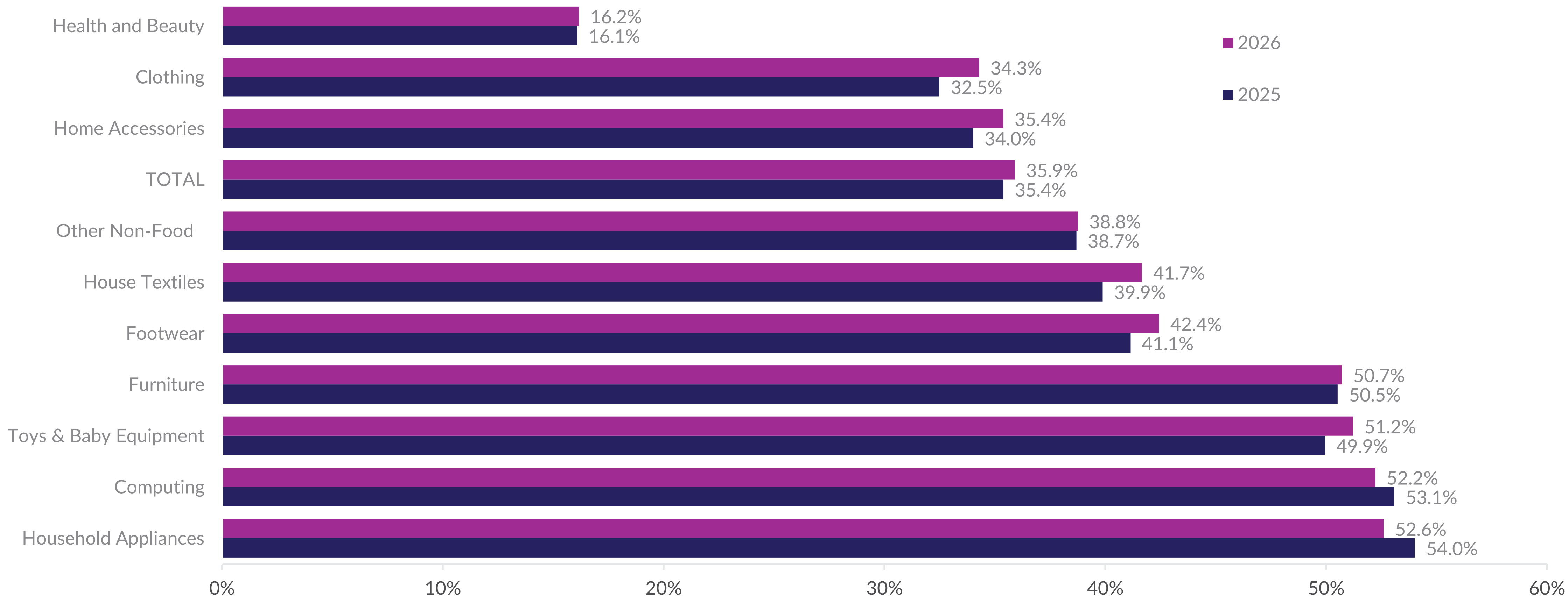
Source: BRC-KPMG Retail Sales Monitor

NON-FOOD GROWTH	ONLINE	UK TOTAL
Jul-26	1.3%	-0.7%
Jul-25	0.3%	1.4%
Jun-26	5.1%	1.2%
3m avg	5.6%	1.3%
12m avg	1.6%	0.4%

NON-FOOD INSTORE		
	LFL	Total
Jul-26	-2.0%	-1.9%
Jul-25	0.9%	1.9%
Jun-26	-1.1%	-1.1%
3m avg	-1.2%	-1.1%
12m avg	-0.4%	-0.2%

ONLINE VS IN-STORE

JULY: ONLINE PENETRATION RANKINGS BY CATEGORY

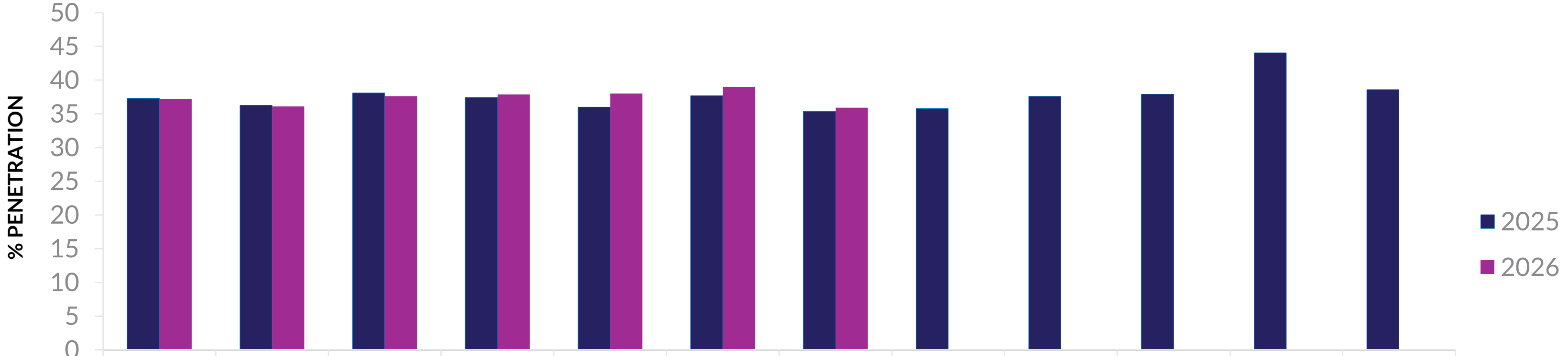


Source: BRC-KPMG Retail Sales Monitor

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

ONLINE PENETRATION EASES OFF

TOTAL NON-FOOD SALES: WEIGHTED ONLINE PENETRATION



	J	F	M	A	M	J	J	A	S	O	N	D
2025	37.3	36.3	38.1	37.4	36.0	37.7	35.4	35.8	37.6	37.9	44.0	38.6
2026	37.2	36.1	37.6	37.9	38.0	39.0	35.9					

Source: BRC-KPMG Retail Sales Monitor

NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
Jul-26	35.9%
Jul-25	35.4%
Jun-26	39.0%
3m average	37.7%
12m average	38.0%

ONLINE SALES FALL BACK, AFTER AN INTENSE Q2

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
Jul 2025	0.3%	0.5%	35.4%	36.5%	0.2%	0.2%
Aug	2.7%	1.8%	35.8%	36.4%	0.9%	0.7%
Sep	1.0%	1.3%	37.6%	36.4%	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	-0.1%	0.1%	38.6%	40.1%	-0.1%	0.0%
Jan	1.3%	0.5%	37.2%	39.8%	0.5%	0.1%
Feb	-1.3%	-0.1%	36.1%	37.4%	-0.5%	0.0%
Mar	0.1%	0.0%	37.6%	37.0%	-0.2%	-0.1%
Apr	-2.3%	-1.1%	37.9%	37.2%	-1.1%	-0.6%
May	10.6%	2.6%	38.0%	37.8%	3.7%	0.7%
Jun	5.1%	4.5%	39.0%	38.3%	1.7%	1.5%
Jul 2026	1.3%	5.6%	35.9%	37.7%	-0.1%	1.8%

Source: BRC-KPMG Retail Sales Monitor.

STORE SALES STALLS, AS HOT WEATHER PERSISTS

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

MONTH	TOTAL	LFL
Jul 2025	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	-0.5%	-0.7%
Jan	2.0%	1.5%
Feb	0.2%	-0.1%
Mar	1.4%	0.9%
Apr	-4.0%	-4.4%
May	-0.4%	-0.5%
Jun	-1.1%	-1.1%
Jul 2026	-1.9%	-2.0%

Source: BRC-KPMG Retail Sales Monitor

SUSTAINED GROWTH IN CLOTHING AND HEALTH & BEAUTY

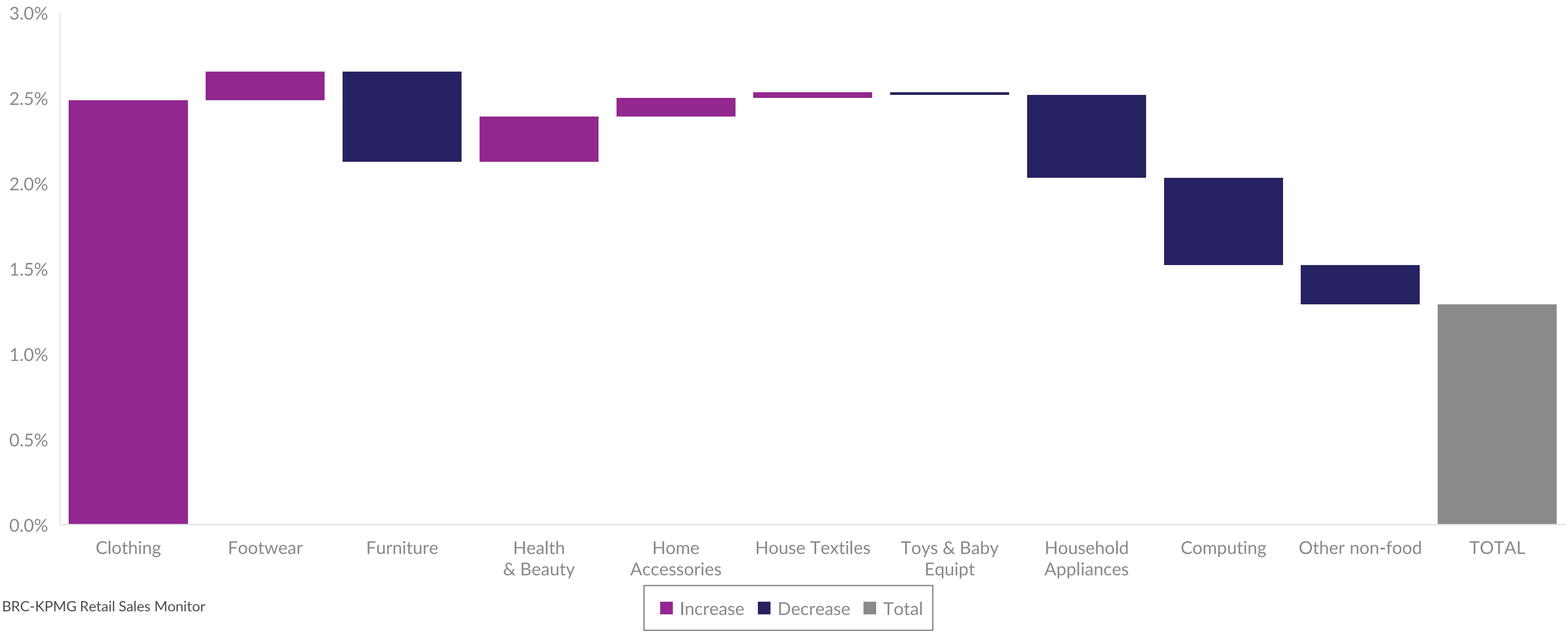
CATEGORY PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

CATEGORY	RANKING UP/DOWN VS JUN-26	JUL-26	JUN-26	JUL-25	3M AVG	12M AVG
Clothing	▲	1	3	10	3	6
Health & Beauty	▲	2	4	3	5	2
Home Accessories	▼	3	1	6	2	3
Footwear	▲	4	8	9	6	9
House Textiles	▼	5	2	4	1	1
Toys & Baby Equipment	▲	6	7	5	7	5
Other Non-Food	▼	7	5	8	4	7
Household Appliances	▲	8	10	2	9	8
Computing	▼	9	6	1	8	4
Furniture	▼	10	9	7	10	10

Source: BRC-KPMG Retail Sales Monitor

COMPUTING SALES SLOW AS CUSTOMERS EXPERIENCE PRICE INFLATION

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



BRC-KPMG Retail Sales Monitor

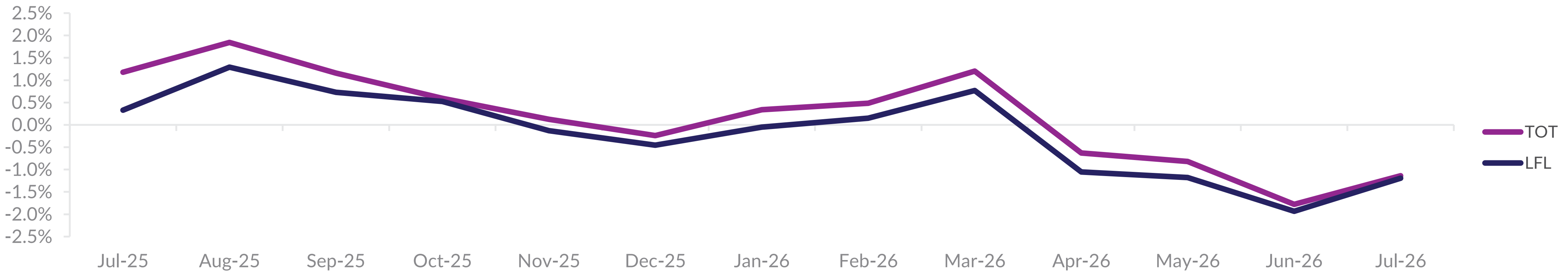
EXPERIENTIAL CATEGORIES SHINE THROUGH STRUGGLING STORE SALES

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

CATEGORY	RANKING UP/DOWN VS JUN-26	JUL-26	JUN-26	JUL-25	3M AVG	12M AVG
Health & Beauty	▲	1	4	3	3	4
Clothing	▲	2	5	6	4	6
Household Appliances	▼	3	1	7	1	2
Home Accessories	▲	4	6	9	6	7
Footwear	▲	5	10	8	7	10
Other Non-Food	▲	6	9	2	9	8
Computing	▼	7	3	1	5	3
Toys & Baby Equipment	▼	8	2	10	2	1
House Textiles	▼	9	7	5	8	9
Furniture	▼	10	8	4	10	5

NON-FOOD STORE 3-MONTH AVERAGE SALES TICK UP IN JULY

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 August 2026 Monitor, covering the 4 weeks from 2 to 29 August 2026, will be released at 00.01am on Tuesday 8 September 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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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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