RETAIL SALES MONITOR

Consumers hold back for Black Friday deals

October 2025

Covering the 4 weeks 5 October – 1 November 2025

% CHANGE YOY	CHANGE VS SEP-2025	TOTAL	LIKE-FOR-LIKE
UK Retail Sales	▼	1.6%	1.5%
Food	▼	3.5%	3.1%
Non-Food	▼	0.1%	0.1%
Non-Food – Store	▼	0.1%	0.2%
Non-Food – Online	▼	0.0%	N/A

HEADLINE COMMENTARY

Helen Dickinson OBE
Chief Executive | British Retail Consortium

"October was a subdued month, with the weakest growth since May. Many delayed spending, waiting for Black Friday deals and cooler temperatures before buying toys, electronics and clothing. Furniture and other homeware fared better as people began preparing their homes ahead of family festive gatherings. Food sales also saw good growth, but this was mostly driven by higher prices rather than higher volumes."

"Retailers are counting on Black Friday to deliver a vital boost, but looming Budget decisions risk undermining fragile consumer confidence. With demand weak and business rates unresolved, retailers face hard choices on investment and recruitment. A business rates surtax on retail would put major stores and thousands of jobs at risk. The Chancellor should use the Budget to remove this threat and help curb inflation for businesses and families."

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

"October's retail sales growth fell back compared to recent months, with online growth drying up altogether. Sales of many household goods have seen consistent growth in recent months, linked to the lag benefit from the house buying surge seen before Stamp Duty changes in Spring. But many home related categories fell in October and the coming months will tell whether this reflects the flattening out of the housing market, or a cautious consumer concerned about the UK's economic prospects."

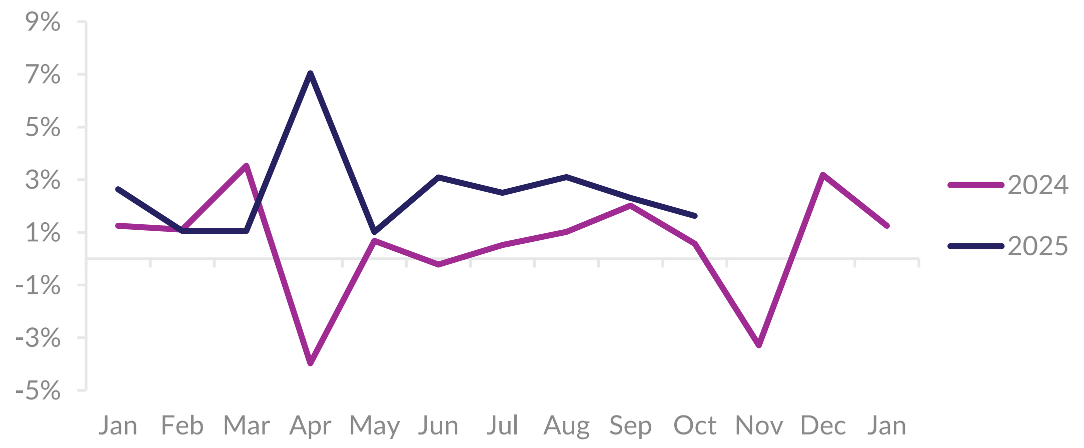
"With Black Friday sales already getting underway and Christmas displays also now up in many stores, retailers are aiming at swiftly reversing the slowdown in sales growth seen during October. Our own research indicates that the majority of shoppers are considering purchases over the Black Friday period, and that AI will play a growing role in how consumers search for and find promotional offers or gifts. This tech evolution presents both challenges and benefits to retailers trying to capture these tech savvy shoppers."

Sarah Bradbury
Food & Drink sector performance, CEO | IGD

"Shopper focus has shifted towards controlling their spending more tightly this month for food and grocery shopping. Confidence has dipped, with shoppers prioritising saving money over quality for the first time this year. The news of potential tax rises will concern many shoppers, even as food price inflation eased somewhat. With the job market stalling and the gap between pay growth and price rises narrowing, overall shoppers aren't feeling much benefit. Looking ahead, we predict shoppers will be extra cautious in the short term to ensure they can afford to treat themselves at Christmas. Depending on the impact of the Budget, the festive period will provide opportunities for trade-up. Earlier this year, we saw in our research that many shoppers indicated they planned to buy more premium private label products and opt for specific brands. If they stick to these intentions, it could provide a boost to spending"

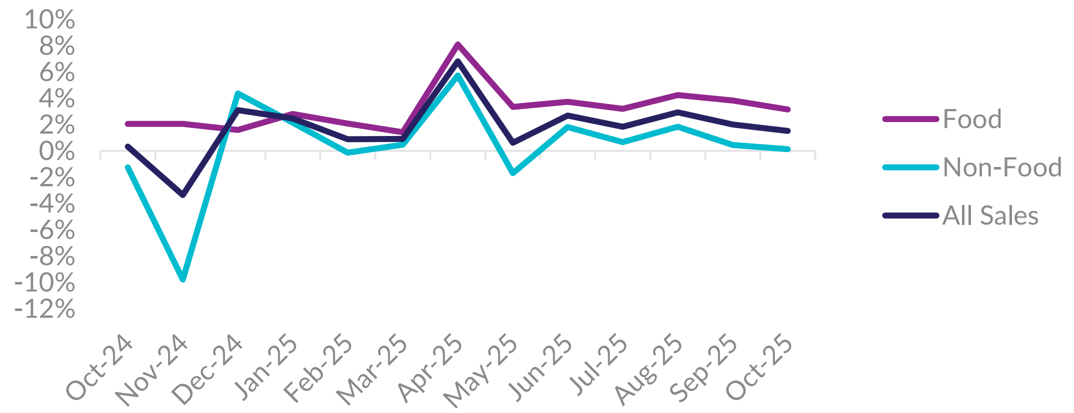
RETAIL SALES TRENDS

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
Oct-25	1.5%	1.6%
Oct-24	0.3%	0.6%
Sep-25	2.0%	2.3%
3m avg	2.1%	2.3%
12m avg	1.9%	2.1%

MONTHLY AVERAGE	LFL	TOTAL
Food	3.1%	3.5%
Non-food	0.1%	0.1%
All Sales	1.5%	1.6%

OVERVIEW

In October, total sales increased by 1.6% YoY, comprising a 3.5% uplift in Food and a 0.1% rise in Non-Food. Within the Non-Food category, In-store sales grew by 0.1% YoY, while Online sales were flat at 0.0%.

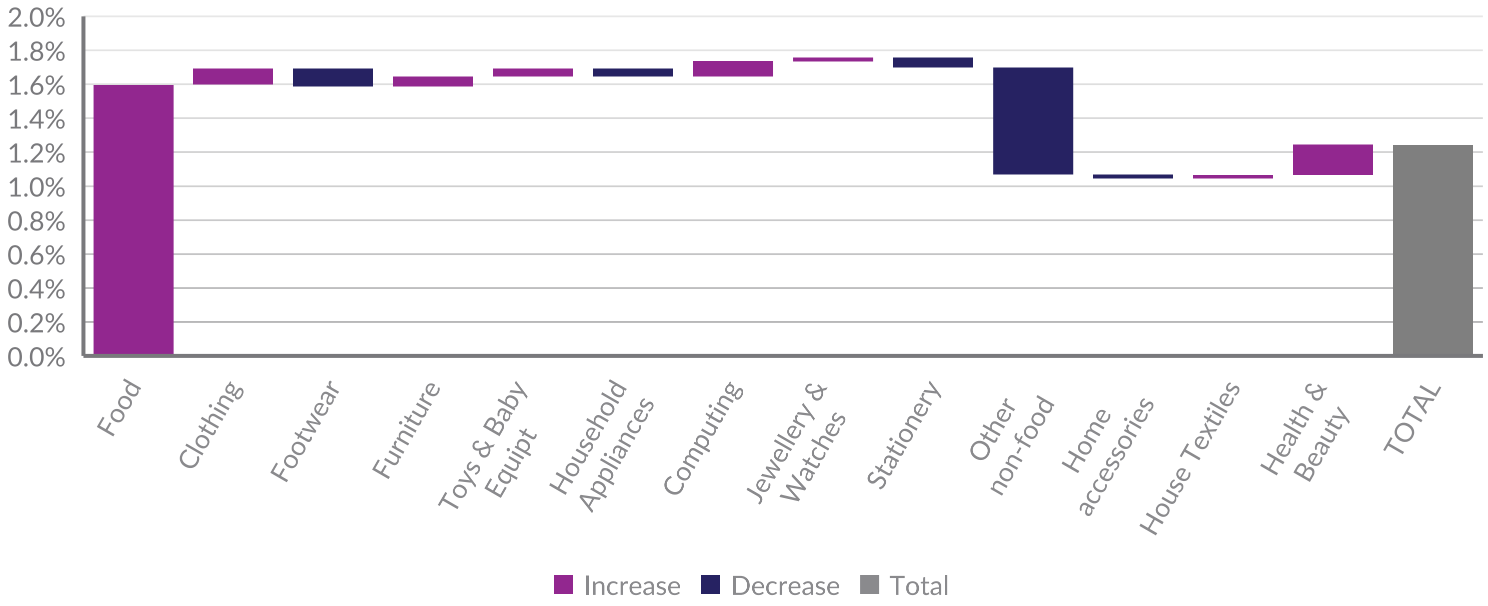
Non-Food sales growth slowed as some cautious consumers anticipated Black Friday deals. Whilst Food inflation has eased a little, it remains a powerful factor driving Food sales values.

Health & Beauty sales were positive and on a par with September. Sales of winter clothing ranges struggled to take off, with the relatively mild weather, leaving some retailers with a cautious eye on price reductions and margins.

Ian Bendelow

Senior Analyst

OCTOBER 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:

Asim Dey, 0207 854 8961, asim.dey@brc.org.uk

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%		
December	1.9%	1.7%	3.1%	3.2%		
Jan-Oct average	3.8%	3.9%	0.4%	0.6%	2.3%	2.5%
Jan-Dec average	3.6%	3.6%	0.3%	0.5%		

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

MONTHLY SALES TRENDS

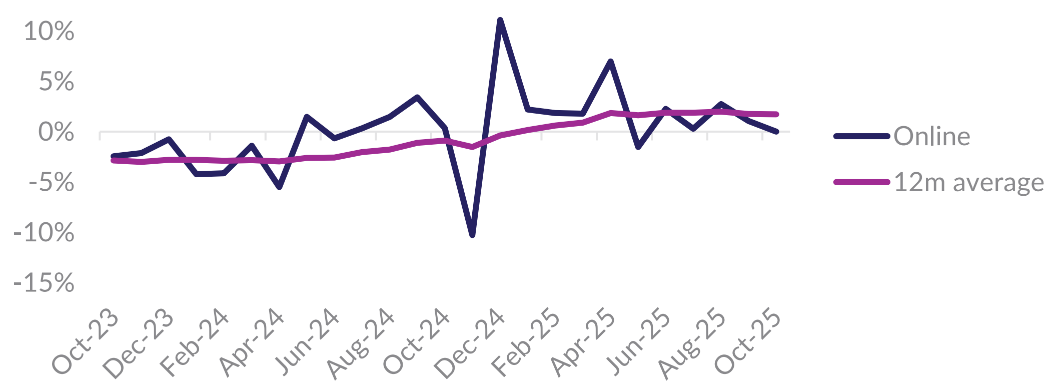
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

MONTHLY AVERAGE	LFL			TOTAL		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2024 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	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%
2025 Oct	3.1%	0.1%	1.5%	3.5%	0.1%	1.6%

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

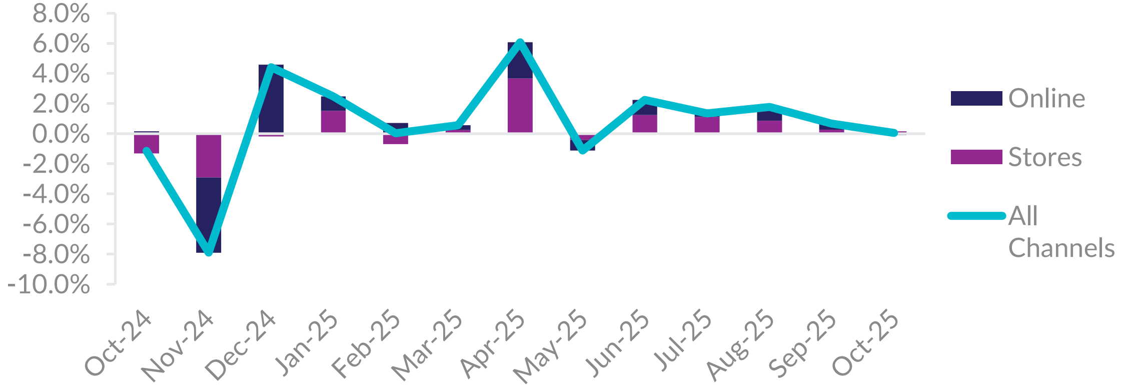
ONLINE VS IN-STORE

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



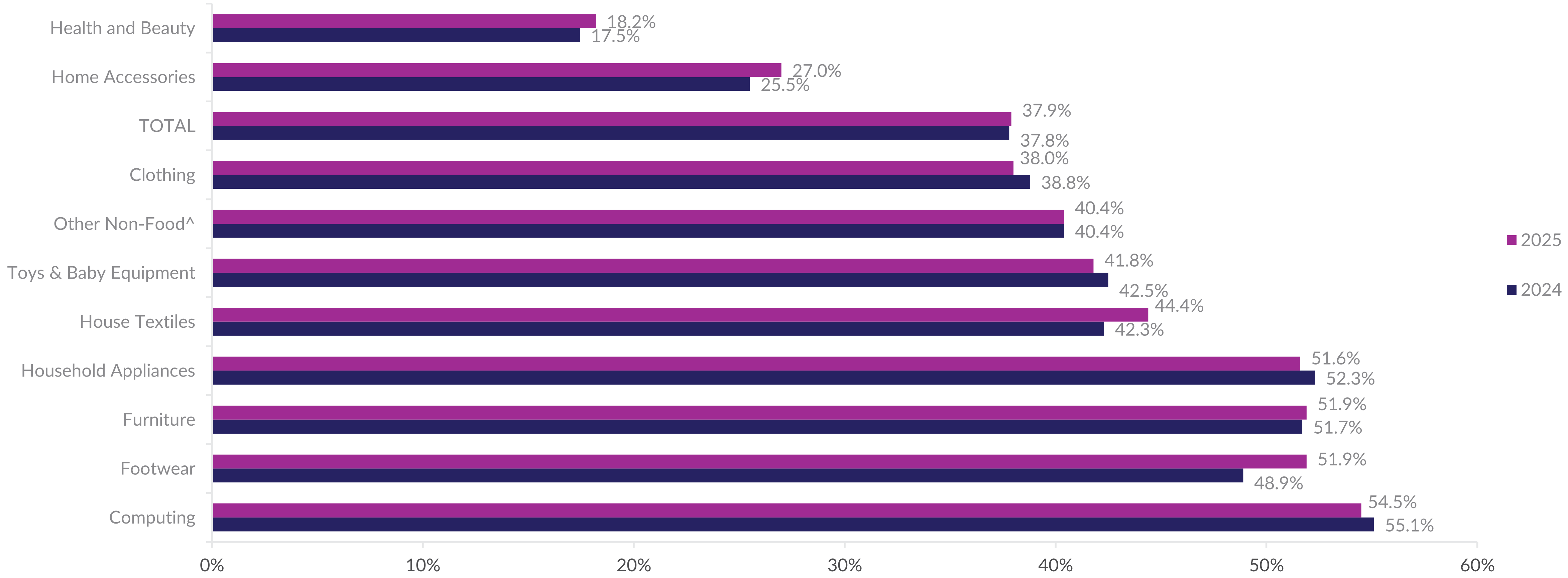
Source: BRC-KPMG Retail Sales Monitor

NON-FOOD GROWTH	ONLINE	UK TOTAL
Oct-25	0.0%	0.1%
Oct-24	0.4%	-1.1%
Sep-25	1.0%	0.7%
3m avg	1.2%	0.8%
12m avg	1.7%	1.0%

NON-FOOD INSTORE		
	LFL	Total
Oct-25	0.2%	0.1%
Oct-24	-2.2%	-2.0%
Sep-25	0.1%	0.5%
3m avg	0.5%	0.6%
12m avg	0.0%	0.6%

ONLINE VS IN-STORE

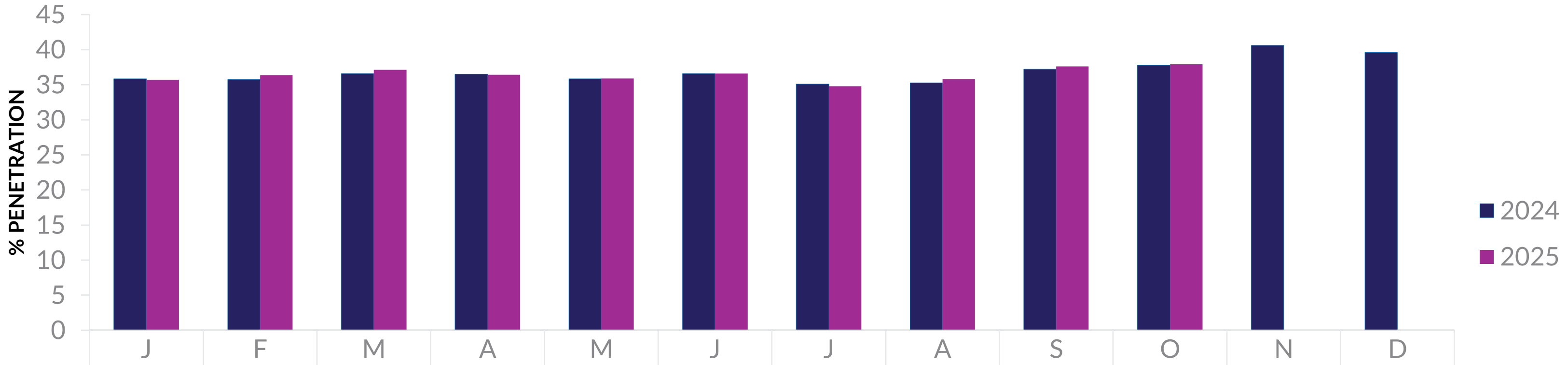
OCTOBER: ONLINE PENETRATION RANKINGS BY CATEGORY



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	40.6	39.6
2025	35.7	36.4	37.1	36.4	35.9	36.6	34.8	35.8	37.6	37.9		

Source: BRC-KPMG Retail Sales Monitor

NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
Oct-25	37.9%
Oct-24	37.8%
Sep-25	37.6%
3m average	37.1%
12m average	37.1%

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
Oct 2024	0.4%	1.9%	37.8%	36.8%	0.2%	0.7%
Nov	-10.3%	-1.7%	40.6%	38.4%	-5.0%	-1.0%
Dec	11.1%	1.2%	39.6%	39.3%	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	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 2025	0.0%	1.2%	37.9%	37.1%	-0.1%	0.4%

Source: BRC-KPMG Retail Sales Monitor.

Online vs In-Store

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

MONTH	TOTAL	LFL
Oct 2024	-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	-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 2025	0.1%	0.2%

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

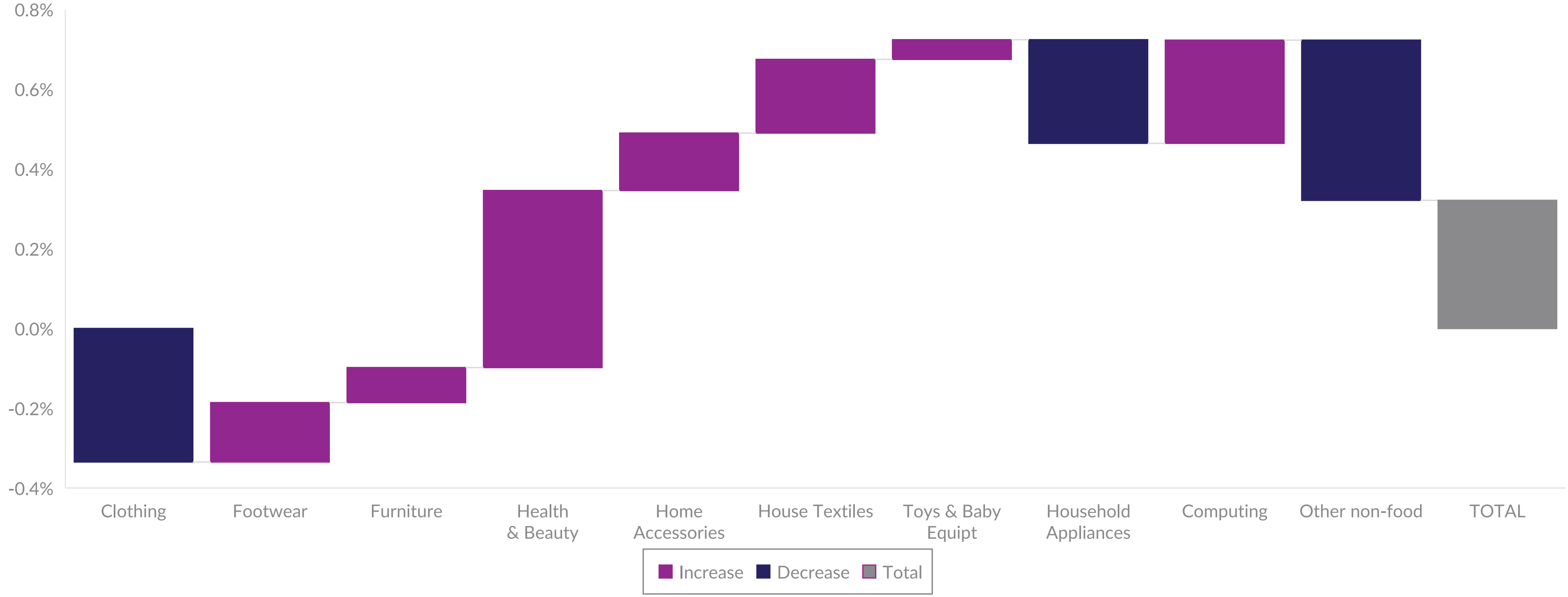
CATEGORY PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

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

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

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



BRC-KPMG Retail Sales Monitor

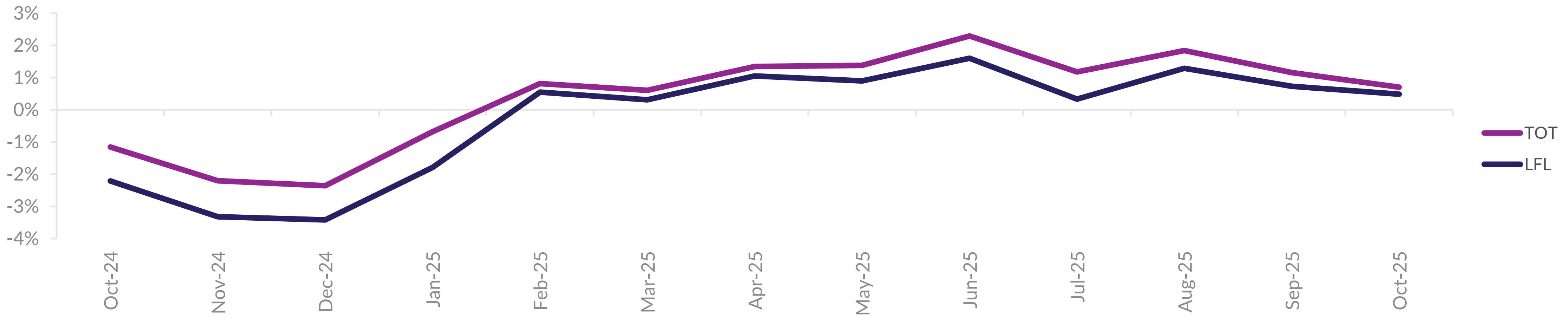
CATEGORY RANKINGS

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

CATEGORY	RANKING UP/DOWN VS SEP-25	OCT-25	SEP-25	OCT-24	3M AVG	12M AVG
Computing	▲	1	1	5	1	1
Toys & Baby Equipment	▼	2	6	10	6	10
Clothing	▼	3	7	7	5	4
Health & Beauty	▼	4	3	1	3	3
Furniture	▲	5	2	2	2	2
Household Appliances	▲	6	9	6	9	8
House Textiles	▼	7	4	3	4	5
Home Accessories	▼	8	5	4	7	7
Other Non-Food	▼	9	8	8	8	6
Footwear	=	10	10	9	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 November 2025 Monitor, covering the 4 weeks from 2 - 29 November 2025, will be released at 00.01am on Tuesday 9 December 2025.

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 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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