

# BRC – KPMG RETAIL SALES MONITOR

## APRIL 2025

COVERING THE FOUR WEEKS 06 APRIL – 03 MAY 2025

## RETAILERS MAKE HAY WHILE THE SUN SHINES

This year Easter was in April, while last year it was in March. This calendar change distorts the year-on-year sales comparisons - resulting in an artificially higher April, but lower March sales growth. In addition to April results, we also report the combined results for March and April to negate this distortion, presenting a clearer view of the underlying sales trend.

% <i>CHANGE year-on-year</i>	Vs Mar-25's % <b>CHANGE</b>	Total	Like-For-Like
UK Retail Sales	▲	7.0%	6.8%
Food	▲	8.2%	8.1%
Non-Food	▲	6.1%	5.7%
Non-Food – Store	▲	5.6%	5.0%
Non-Food – Online	▲	7.0%	n/a



**Helen Dickinson OBE, Chief Executive | British Retail Consortium**

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"The sunniest April on record brought with it a boost to retail sales. While the stronger performance was partially a result of Easter falling in April this year, the sunshine prompted strong consumer spending across the board. Food sales performed well as people brought together their family and friends for Easter celebrations, while sales of DIY, homeware and gardening goods shined bright as people made the most of the weather. Clothing sales, where growth has been sluggish in recent months, also improved as consumers refreshed their wardrobes for the new season.

"But clouds loom on the horizon as new costs begin to bite. Even a strong April performance will do little to make up for the extra £7bn facing the industry this year. Both Employer National Insurance Contributions and the National Living Wage rose last month, and retailers face another £2bn bill when a new packaging tax comes in later this year. If the Government wants to secure the future of our high streets, then it must ensure that no shop pays more as a result of the upcoming business rates reforms, or it will be our local communities that pay the price."



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

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"Retail sales have been showing growth for five months now. The pace of that growth picked up in April due to Easter and the drier weather boosting clothing and garden related sales, while the uptick in house buying ahead of the Stamp Duty changes likely filtered through to furniture and DIY related sales, as well as other homewares.

"Consumers tell us they are still taking steps to manage their household budgets, so retailers will need to focus on how they can continue to unlock spending over the coming months to keep the growth going - including capitalising on purchases related to strong summer holiday demand."

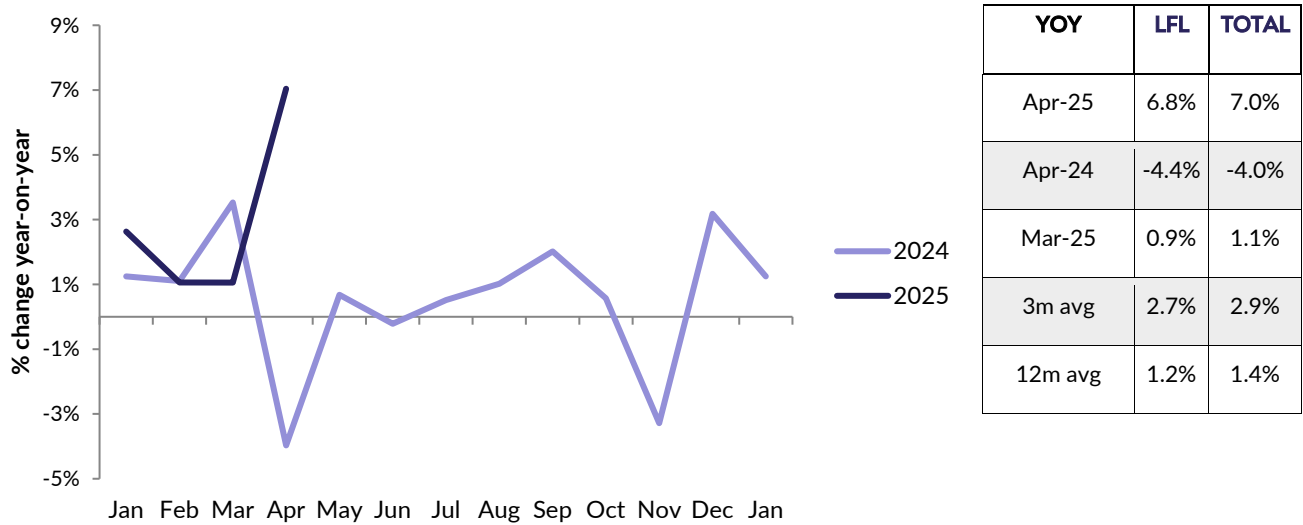


**Food & Drink sector performance | Sarah Bradbury, CEO | IGD**

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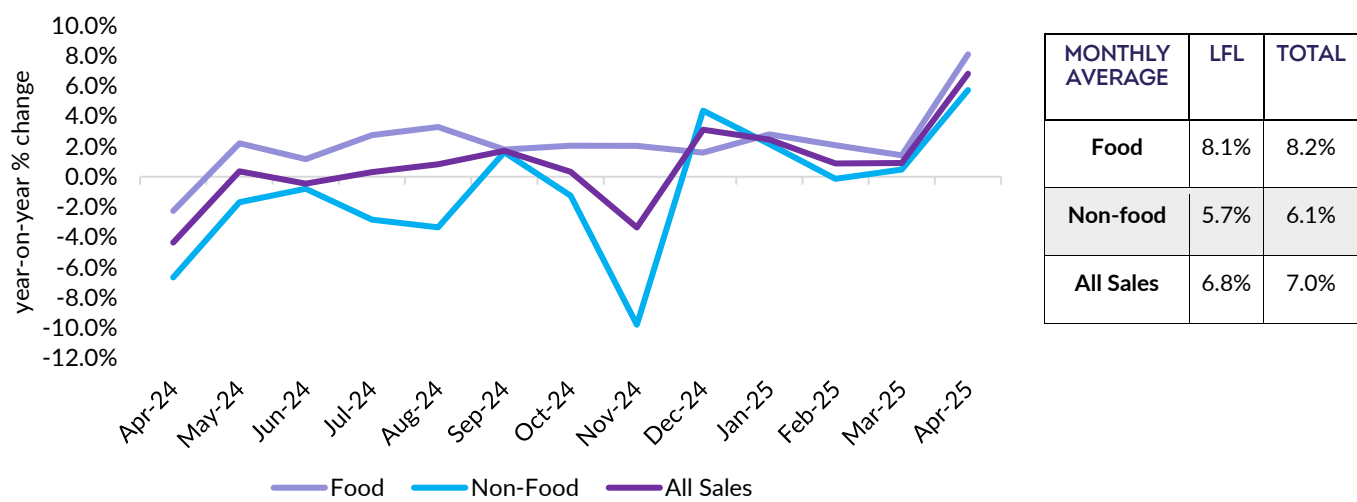
"April saw a welcome boost for the market and shoppers, thanks to sporadic spells of warmer weather, interest rate cuts and the long Easter weekend, which lifted overall confidence by a point. However, the persistent challenge of food price inflation, which climbed to 2.6% in April from 2.4% in March, continues to weigh heavily on both businesses and households. As they grapple with rising costs, we foresee limited further gains in shopper confidence."

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)

OVERVIEW

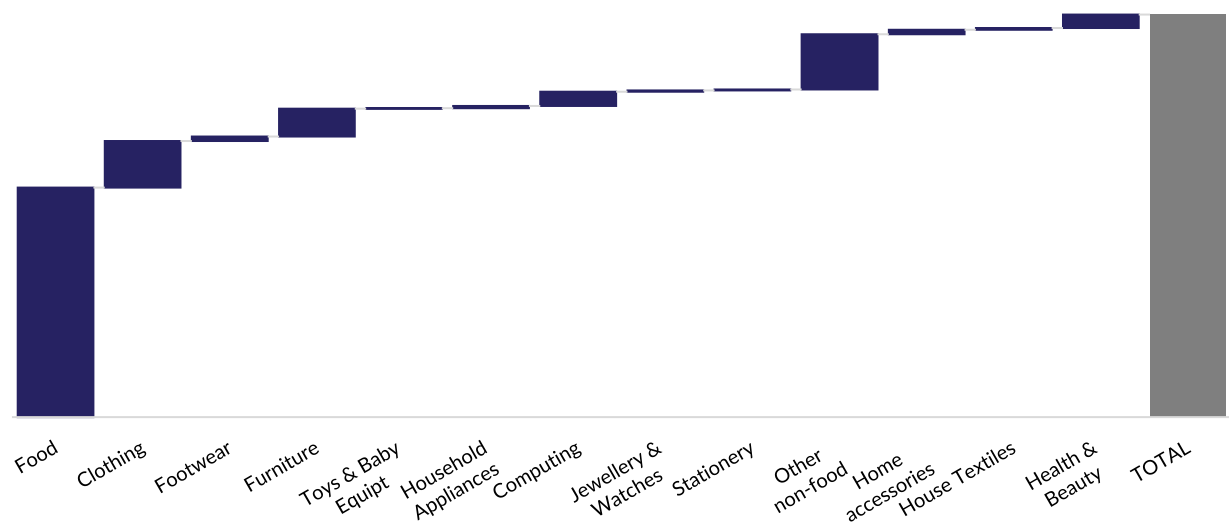
April saw an increase in total sales of 7% YOY, with Food up 8.2% and Non-Food growing 6.1%. The impact of Easter falling in April this year, versus March last year, flattered these April results. Nevertheless, both March and April experienced robust YOY sales. When sales values for March and April are taken together, the YOY total sales were up 4.3%. This is very welcome news for UK Retail.

Retailers reported strong sales activity across a wide array of product categories; this included full price sales and some great promotional uplift. The importance of revising product ranges with just the right level of newness was underlined, especially in some technology, clothing and footwear categories. Another important element in April's sales was anticipating those must stock star products that ignite sudden consumer demand and traffic to shops and web sites.

Combined with warm weather, retailers holding sufficient stock volume in the right categories were rewarded with some very strong sales: electric fans, outdoor furniture, outdoor toys and summer footwear proved very popular with consumers eager to buy these seasonal lines. Conversely, there were some reports of footfall dipping in retail shops when the weather was hottest with consequent short term dips in sales of non-weather related categories.

Ian Bendelow, BRC Senior Analyst

APRIL: 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  
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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%	6.8%	7.0%
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-Apr average	4.7%	4.9%	0.5%	0.7%	2.6%	2.8%
Jan-Dec average	3.6%	3.6%	0.5%	0.7%		

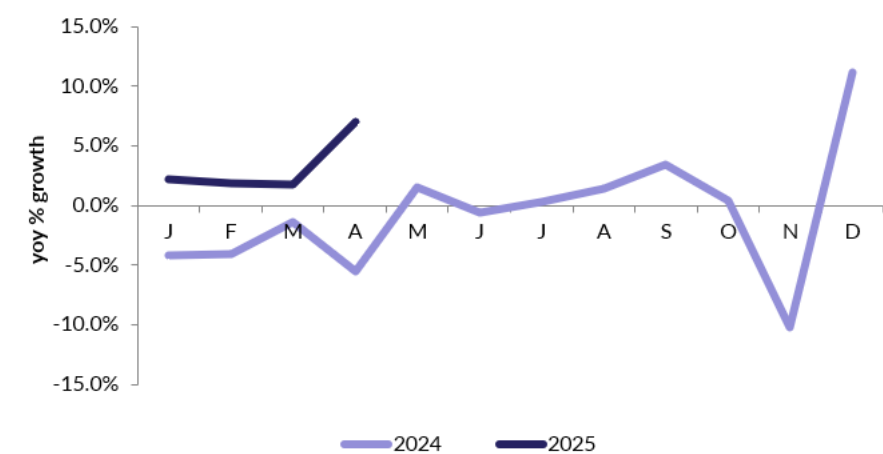
Source: BRC-KPMG RETAIL SALES MONITOR (Includes Food data from IGD)

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
2024 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	1.4%	0.5%	0.9%	1.6%	0.6%	1.1%
2025 Apr	8.1%	5.7%	6.8%	8.2%	6.1%	7.0%

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

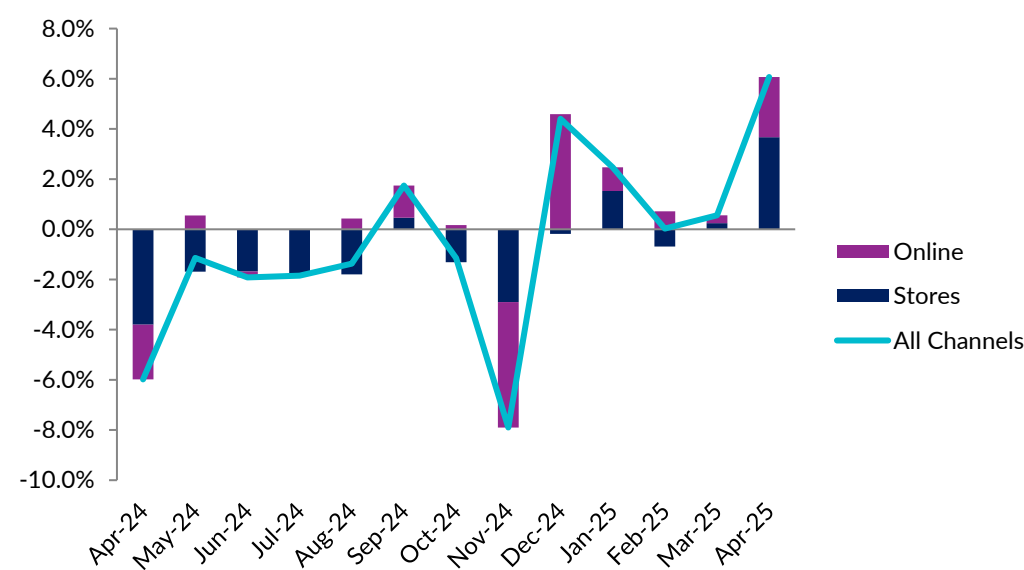
ONLINE SALES GROWTH (NON-FOOD):  
% CHANGE YEAR-ON-YEAR



NON-FOOD GROWTH	ONLINE*	UK TOTAL
Apr-25	7.0%	5.7%
Apr-24	-5.5%	-6.7%
Mar-25	1.8%	0.5%
3m avg	3.4%	2.1%
12m avg	1.8%	0.1%

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

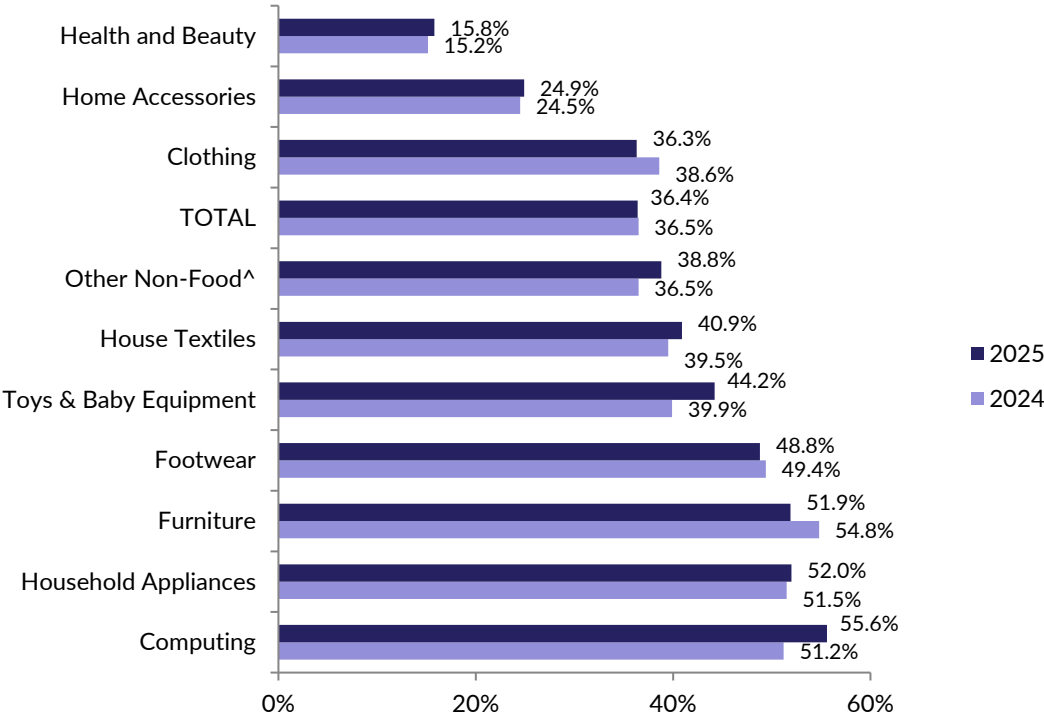
APRIL AVERAGE: CONTRIBUTION TO NON-FOOD SALES GROWTH BY CHANNEL  
% CHANGE YEAR-ON-YEAR



NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR		
	LFL	TOTAL
Apr-25	5.0%	5.6%
Apr-24	-7.3%	-6.2%
Mar-25	-0.3%	-0.1%
3m avg	1.1%	1.3%

Source: BRC-KPMG RETAIL SALES MONITOR

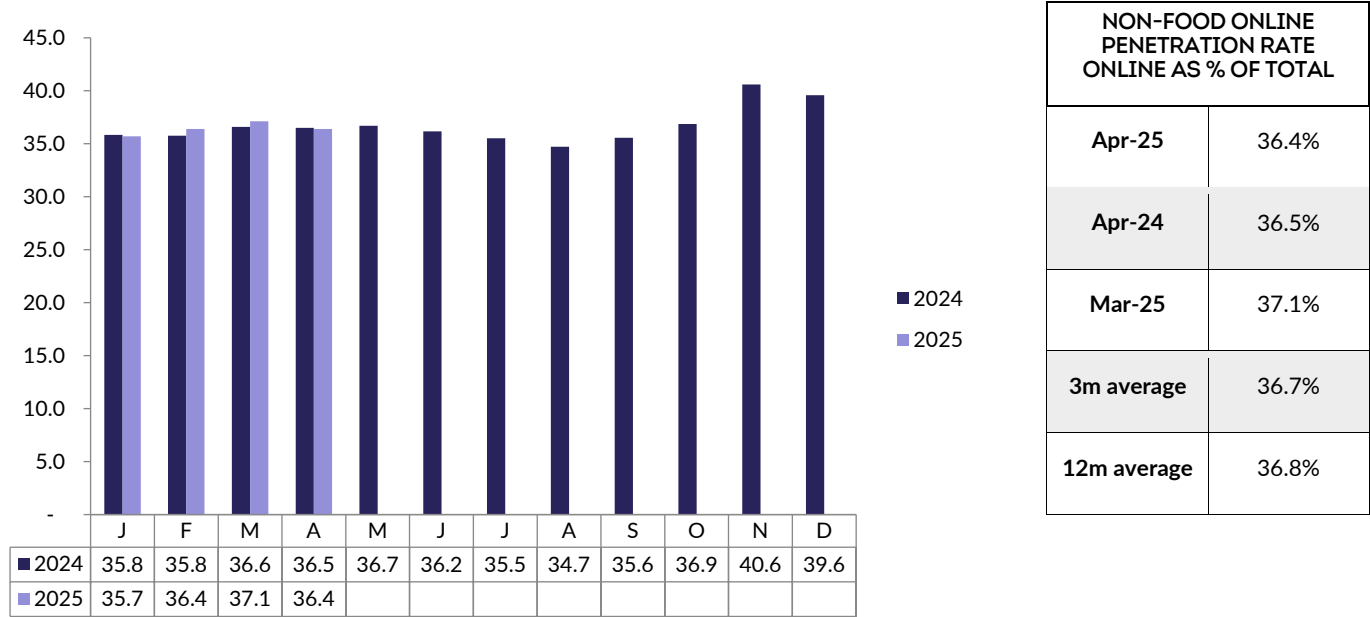
APRIL: ONLINE PENETRATION RANKINGS BY CATEGORY



SOURCE: BRC-KPMG RETAIL SALES MONITOR

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

TOTAL NON-FOOD SALES:  
WEIGHTED ONLINE PENETRATION



Source: BRC-KPMG RETAIL SALES MONITOR

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
Apr 2024	-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	1.8%	1.9%	37.1%	36.4%	0.3%	0.7%
Apr 2025	7.0%	3.4%	36.4%	36.7%	2.4%	1.1%

Source: BRC-KPMG Retail Sales Monitor.

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

MONTH	TOTAL % CHANGE YOY	LFL % CHANGE YOY
Apr 2024	-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	-0.1%	-0.3%
Apr 2025	5.6%	5.0%

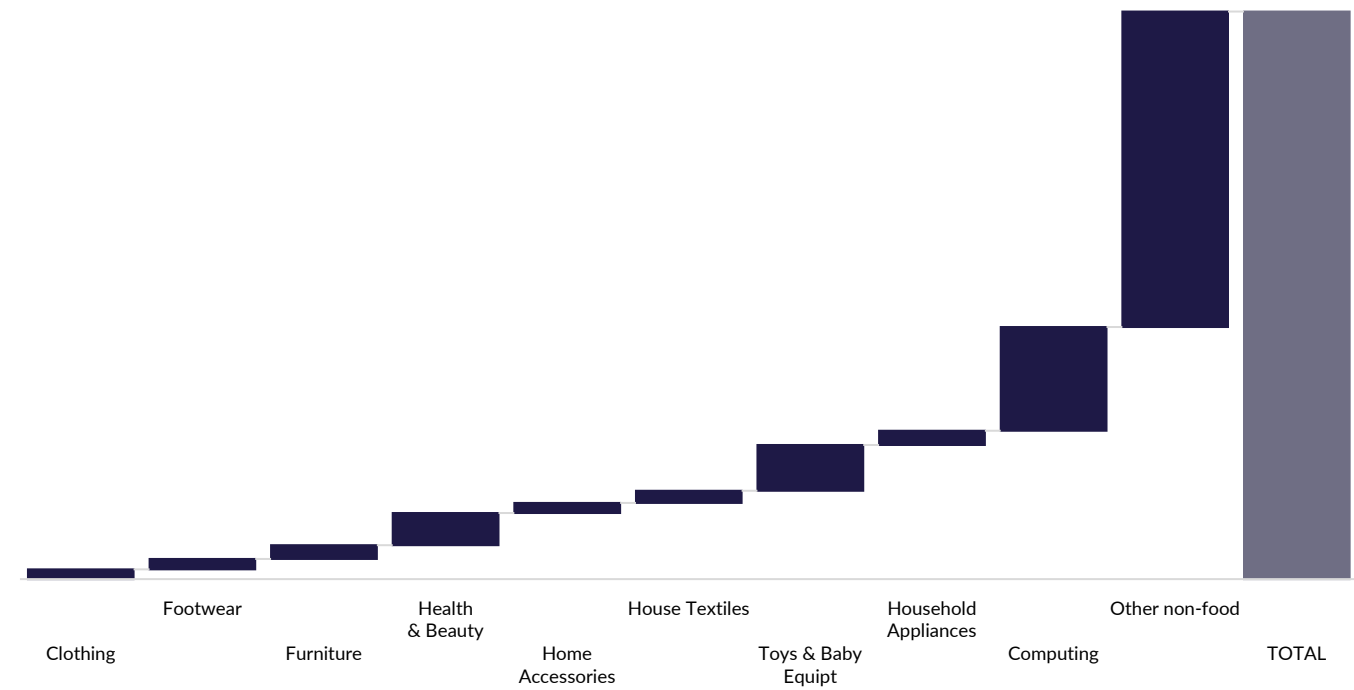
Source: BRC-KPMG Retail Sales Monitor

SECTOR PERFORMANCE: **ONLINE SALES CATEGORY GROWTH RANKINGS**

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

Source: BRC-KPMG RETAIL SALES MONITOR

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



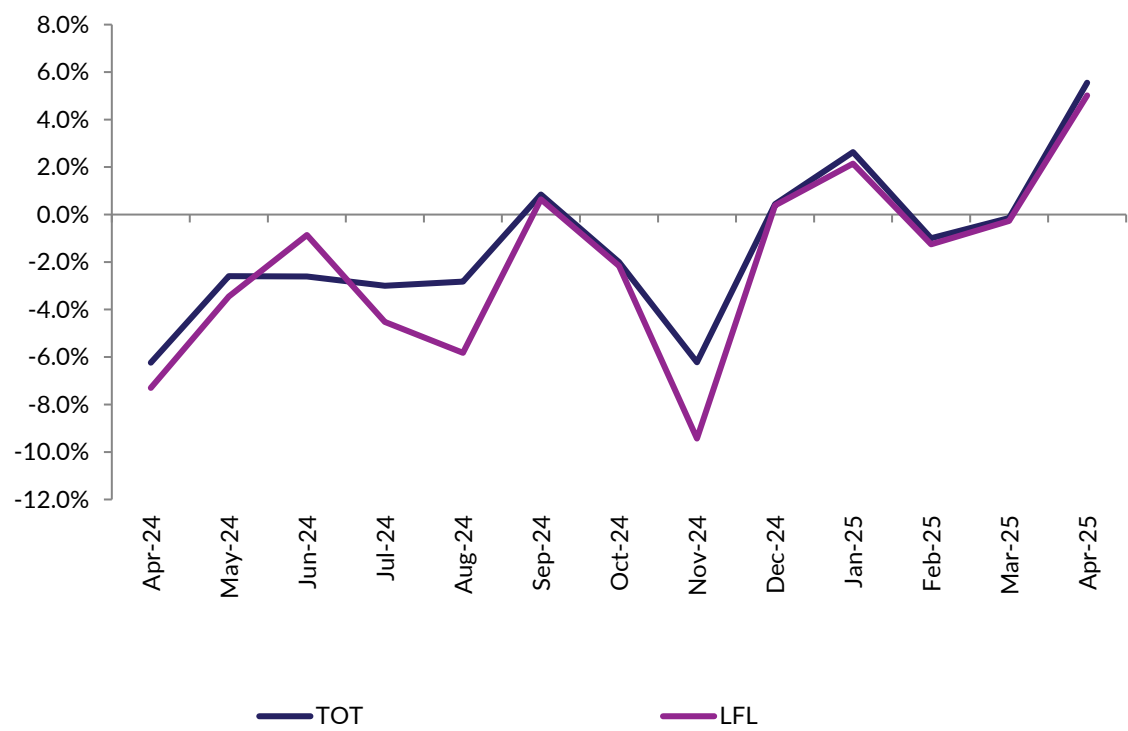
Source: BRC-KPMG RETAIL SALES MONITOR

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

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

Source: BRC-KPMG RETAIL SALES MONITOR

NON-FOOD STORE 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 May 2025 Monitor, covering the 4 weeks 04 May – 31 May 2025, will be released at 00.01am on Tuesday 10 June 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.



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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.



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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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