RETAIL SALES MONITOR

Rising sales not enough to fend off job losses and store closures

July 2025

Covering the 4 weeks 06 July – 02 August 2025

% Change YOY	Change vs Jun-2025	Total	Like-For-Like
UK Retail Sales	▼	2.5%	1.8%
Food	▼	3.9%	3.2%
Non-Food	▼	1.4%	0.7%
Non-Food – Store	▼	1.9%	0.9%
Non-Food – Online	▼	0.3%	n/a

Headline Commentary

Helen Dickinson OBE
Chief Executive | British Retail Consortium

"Food sales did well in early July thanks to warm weather and a packed sporting schedule, though this momentum failed to hold for the rest of the month. Rising food inflation meant increased spending was more a result of higher prices than improved demand. Fashion sold well early in the month, but deteriorated as weather worsened, while homeware and indoor furniture grew steadily, recovering from the previous year's decline. Gaming and toys sold particularly well, as nostalgic adults purchased products like Lego.

"With sales growth at these levels, it is barely touching the sides of covering the £7bn new costs imposed on retailers at the last Budget. If the upcoming Autumn Budget sees more taxes levied on retailers' shoulders many will be forced to make difficult choices about the future of shops and jobs, and ongoing pressure would push prices higher. Ultimately, this means more families struggling, particularly those on lower incomes, reduced consumer spending and a drag on economic growth."

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

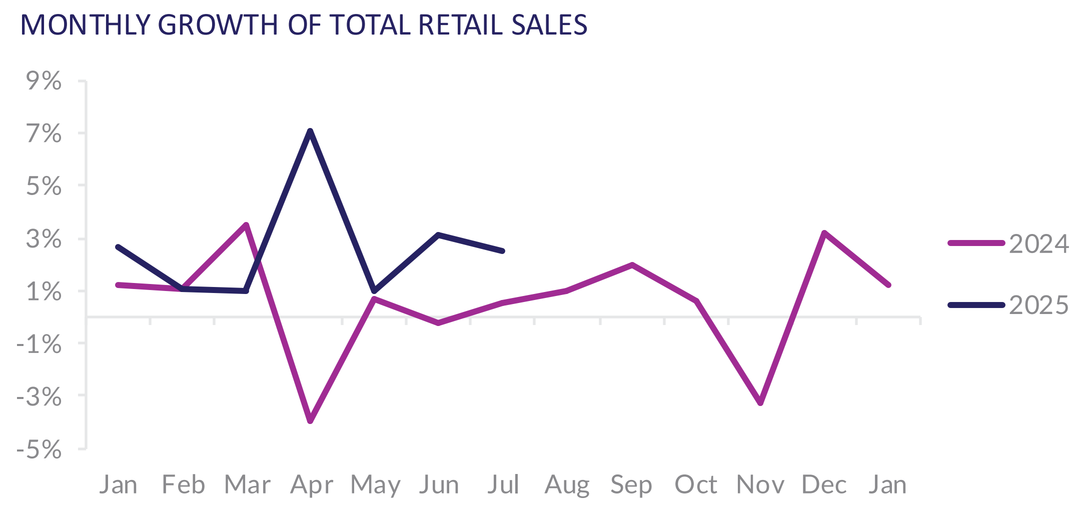
"The UK's fifth warmest July on Met Office record brought a boost to home appliance and food and drink sales. But rising inflation was also a driver of the latter and monthly non-food sales are only growing at around 1% on average at present. With employment costs having risen and inflation both a business and consumer side pressure, it remains a challenging trading environment for many retailers.

"While the majority of consumers that KPMG surveys are confident in their ability to balance their monthly household budgets, big ticket purchases are more considered in the context of rising essential costs and ongoing caution about the economy and labour market. Holidays are the priority for many this summer but those heading away have had to account for a higher cost of travel. Consequently, spending in some areas of the retail sector remains subdued and competition for consumer spend will remain fierce."

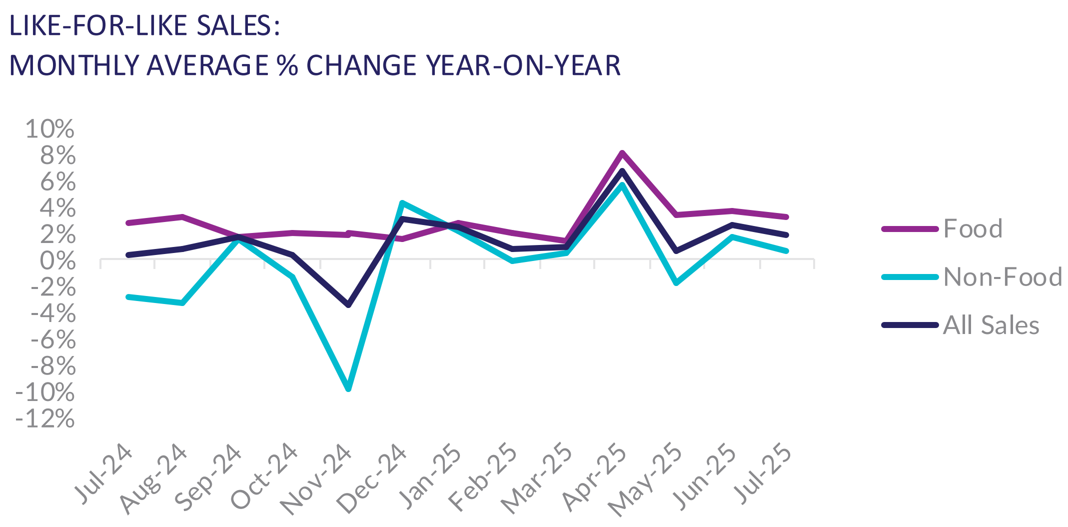
Sarah Bradbury
Food & Drink sector performance, CEO | IGD

"July's shopper confidence fell to zero for the first time since April, cooling alongside the weather despite boosts from Wimbledon and the Lionesses' win. More households are feeling the pinch yet trust in the industry rose by three points. With food price inflation climbing to 4.5% and economic uncertainty growing, shoppers face a tough outlook. Own label products continue to outperform brands, but modest volume growth shows inflation is masking any gains. A potential interest rate cut, and a sunny bank holiday could offer a much-needed boost at the end of the summer."

Retail Sales Trends



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



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

yoy	LFL	total
Jul-25	1.8%	2.5%
Jul-24	0.3%	0.5%
Jun-25	2.7%	3.1%
3m avg	1.8%	2.3%
12m avg	1.6%	1.9%

Monthly average	LFL	Total
Food	3.2%	3.9%
Non-food	0.7%	1.4%
All Sales	1.8%	2.5%

Overview

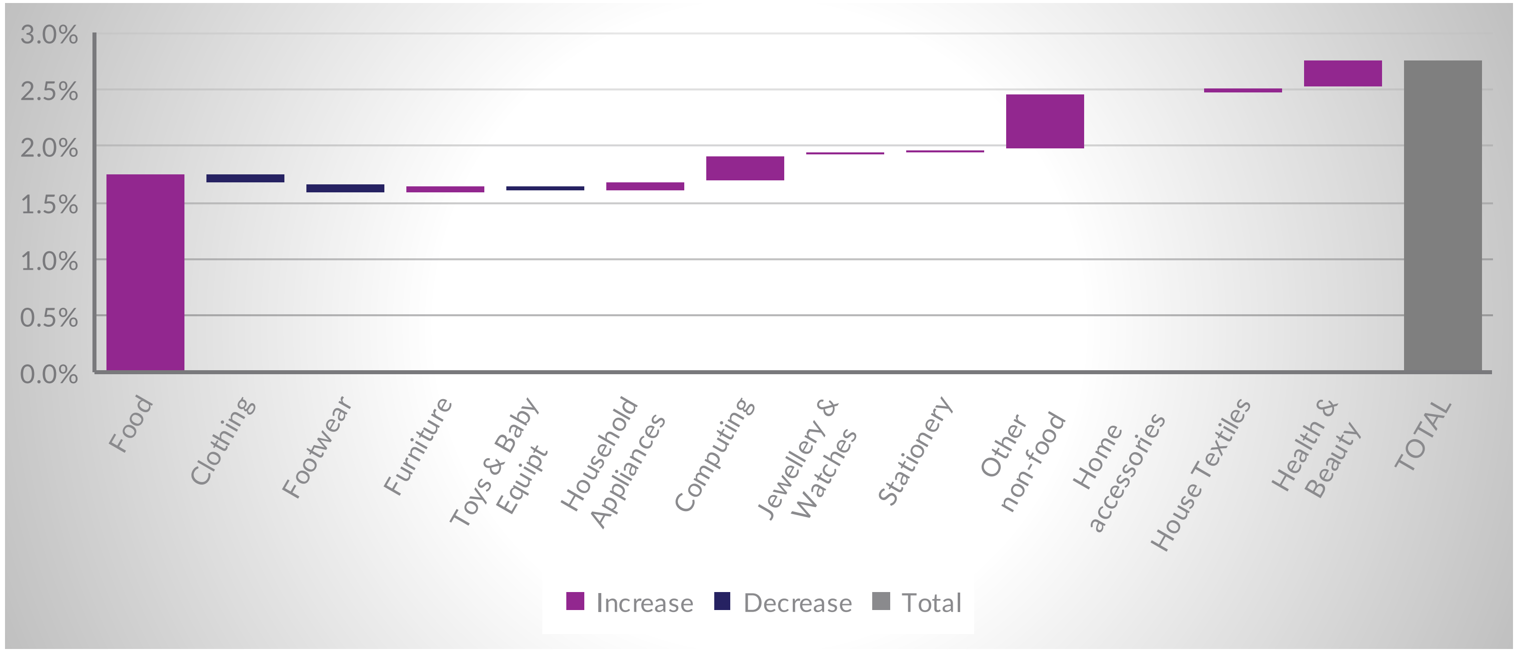
July saw an increase in total sales of 2.5% YOY, with Food up 3.9% and a Non-Food increase of 1.4%. The in-store channel for Non-Food delivered 1.9% YOY, versus a modest online result of 0.3%.

Sales in the first two weeks of July were fairly robust, but the second half fell away, especially Clothing and Footwear. Computing and Gaming maintained a strong performance, with a notable contribution from the launch of the new Samsung Galaxy phones and watches. TV sales continue to struggle, although there were some bright spots with promotional sales of high value OLED televisions.

Home category growth picked up towards the end of July, with improved performance in beds and bedrooms, kitchenware, gifts, indoor furniture and upholstery.

Ian Bendelow
Senior Analyst

JULY SCALED CONTRIBUTION TO TOTAL SALES GROWTH BY CATEGORY



Scaled to UK retail market. 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%		
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-Jul average	4.5%	4.7%	0.5%	0.7%	2.3%	2.6%
Jan-Dec average	3.6%	3.6%	0.5%	0.7%		

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

Monthly Sales Trends

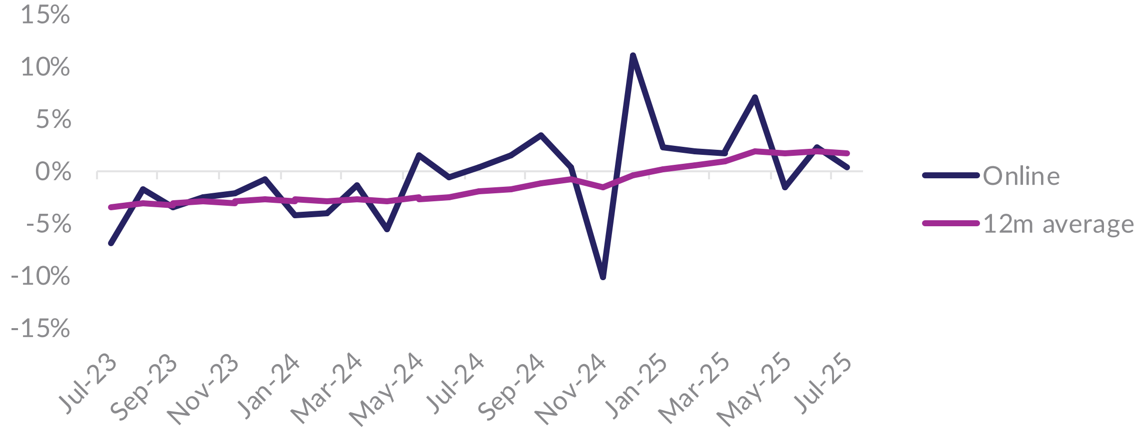
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

Monthly Average	LFL			Total		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2024 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%
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%
2025 Jul	3.2%	0.7%	1.8%	3.9%	1.4%	2.5%

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: online sales of non-food goods (including mail and phone orders)

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

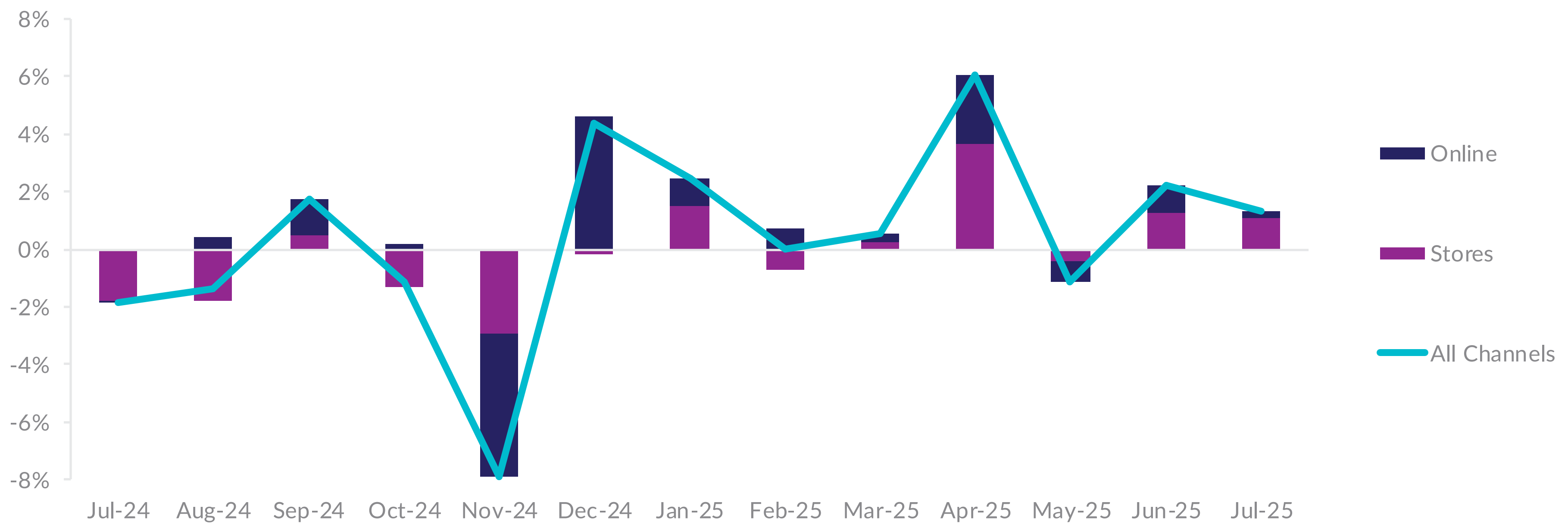
Source: BRC-KPMG RETAIL SALES MONITOR

non-food growth	Online	uk total
Jul-25	0.3%	1.4%
Jul-24	0.3%	-1.8%
Jun-25	2.3%	2.2%
3m avg	0.5%	0.9%
12m avg	1.9%	0.8%

Non-food In-Store % change year-on-year		
	LFL	Total
Jul-25	0.9%	1.9%
Jul-24	-4.5%	-3.0%
Jun-25	1.6%	2.2%
3m avg	0.3%	1.2%
12m avg	-0.7%	0.2%

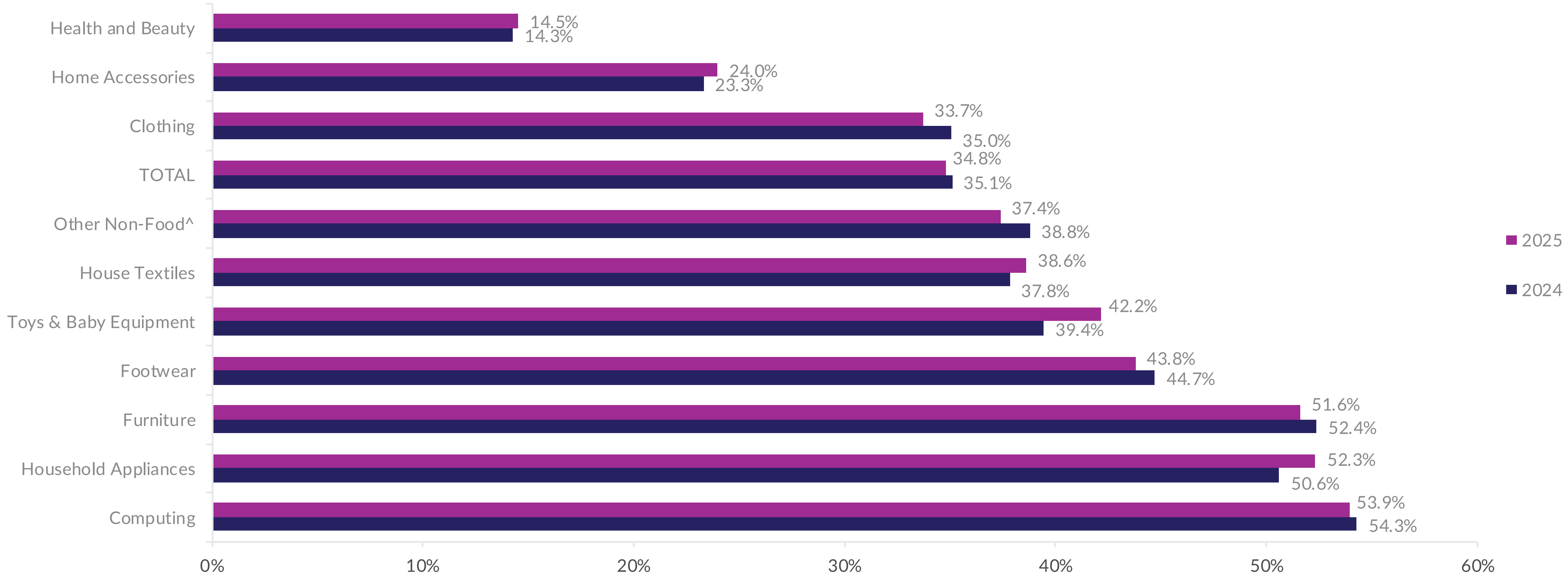
Online vs In-Store

JULY AVERAGE CONTRIBUTION TO NON-FOOD SALES GROWTH BY CHANNEL CHANGE YEAR-ON-YEAR



Online vs In-Store

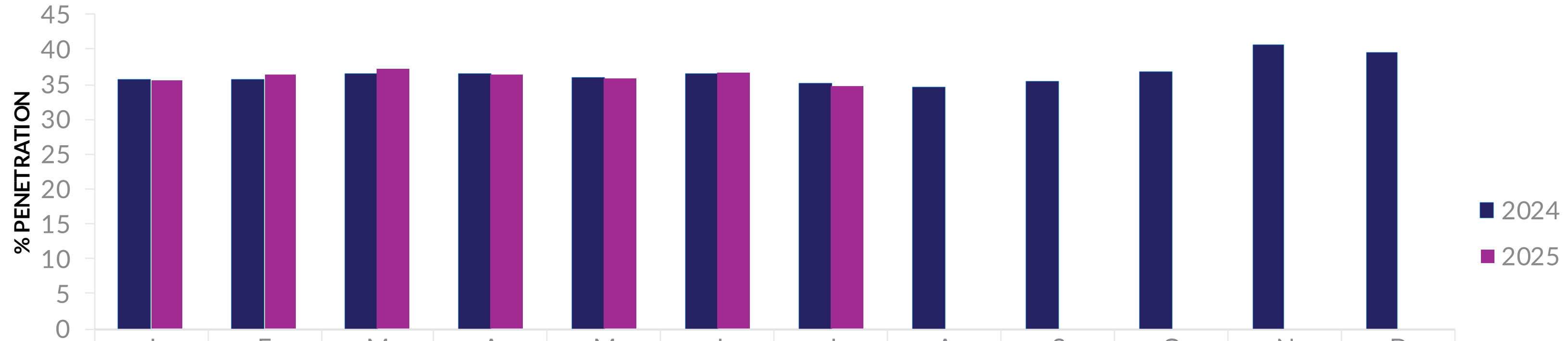
JULY: ONLINE PENETRATION RANKINGS BY CATEGORY



Source: BRC-KPMG RETAIL SALES MONITOR
Note: Online sales in the Monitor include all distance sales, notably mail and phone orders

Online 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	34.7	35.6	36.9	40.6	39.6
2025	35.7	36.4	37.1	36.4	35.9	36.6	34.8					

Source: BRC-KPMG RETAIL SALES MONITOR

Non-Food online Penetration rate Online as % of Total	
Jul-25	34.8%
Jul-24	35.1%
Jun-25	36.6%
3m average	35.8%
12m average	36.7%

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
Jul 2024	0.3%	0.3%	35.1%	35.9%	-0.1%	0.1%
Aug	1.5%	0.3%	34.7%	35.5%	0.4%	0.0%
Sep	3.4%	1.9%	35.6%	35.2%	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	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 2025	0.3%	0.5%	34.8%	35.8%	0.2%	0.2%

Source: BRC-KPMG Retail Sales Monitor.

Online vs In-Store

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

Month	Total	LFL
Jul 2024	-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	5.6%	5.0%
May	-0.9%	-1.8%
Jun	2.2%	1.6%
Jul 2025	1.9%	0.9%

Source: BRC-KPMG Retail Sales Monitor

Category Rankings

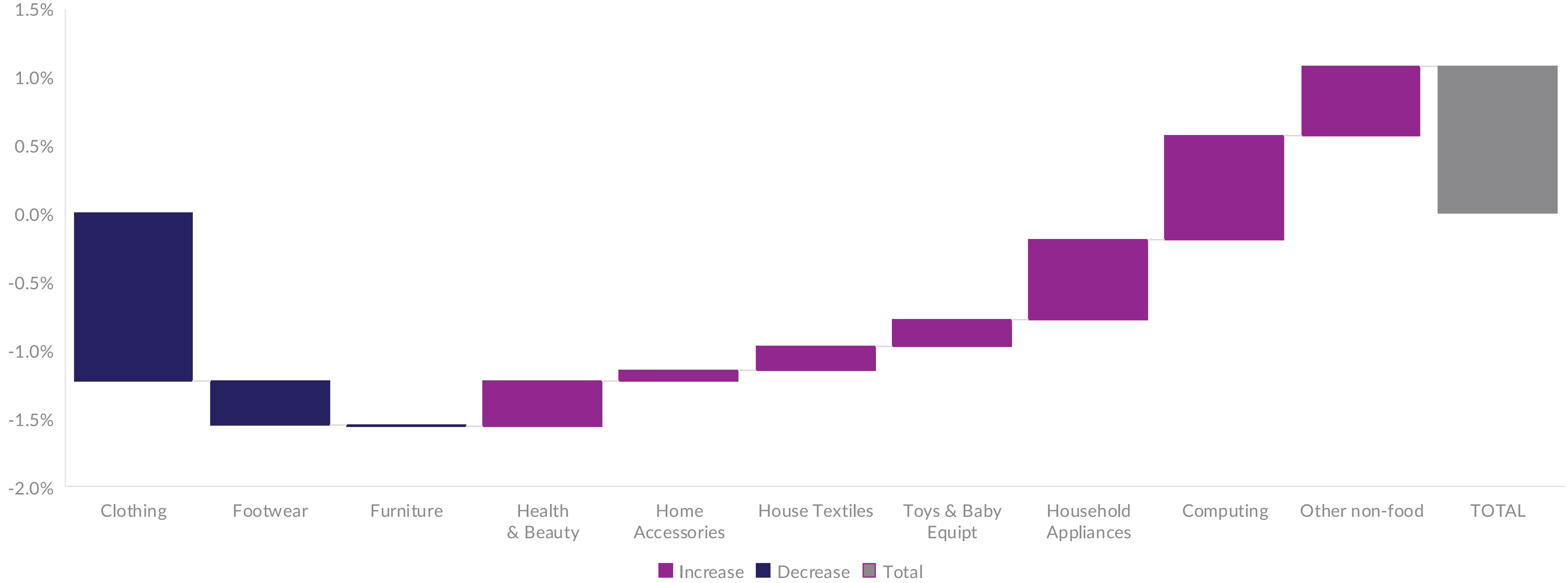
CATEGORY PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

Category	Ranking Up/Down vs Jun-25	Jul-25	Jun-25	Jul-24	3M Avg	12M Avg
Computing	▲	1	4	2	2	1
Household Appliances	▼	2	1	7	1	5
Health & Beauty	▼	3	2	1	3	2
House Textiles	▼	4	3	6	4	3
Toys & Baby Equipment	▲	5	7	3	6	4
Home Accessories	▲	6	8	8	5	6
Furniture	▼	7	5	10	8	7
Other Non-Food	▼	8	6	9	7	8
Footwear	=	9	9	5	10	9
Clothing	=	10	10	4	9	10

Source: BRC-KPMG RETAIL SALES MONITOR

Category Rankings

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



Scaled to UK retail market. Source: BRC-KPMG RETAIL SALES MONITOR

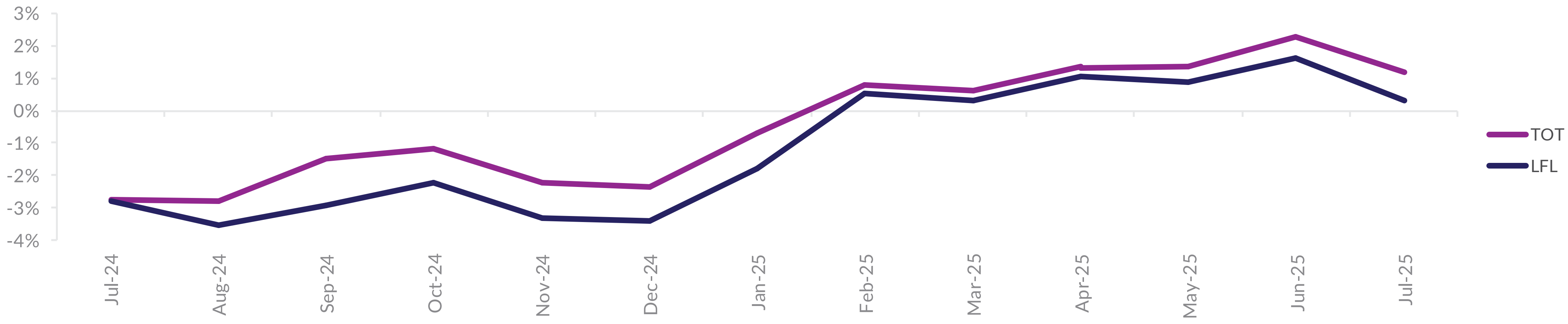
Category Rankings

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

Category	Ranking Up/Down vs Jun-25	Jul-25	Jun-25	Jul-24	3M Avg	12M Avg
Computing	▲	1	3	5	1	1
Other Non-Food	▼	2	4	7	5	7
Health & Beauty	▲	3	6	1	4	2
Furniture	▼	4	2	9	2	3
House Textiles	▲	5	7	6	6	6
Clothing	▼	6	5	2	7	4
Household Appliances	▼	7	1	8	3	8
Footwear	=	8	8	3	9	9
Home Accessories	=	9	9	4	8	5
Toys & Baby Equipment	=	10	10	10	10	10

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 August 2025 Monitor, covering the 4 weeks 03 – 30 August 2025, will be released at 00.01am on Tuesday 09 September 2025. The data is collected and collated for the BRC by KPMG.

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 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:
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