RETAIL SALES MONITOR

Consumers put the brakes on non-essential spending

May 2025

Covering the four weeks 04 May – 31 May 2025

% CHANGE YEAR-ON-YEAR	VS APR-25'S % CHANGE	TOTAL	LIKE-FOR-LIKE
UK Retail Sales	↓	1.0%	0.6%
Food	↓	3.6%	3.3%
Non-Food	↓	-1.1%	-1.7%
Non-Food – Store	↓	-0.9%	-1.8%
Non-Food – Online	↓	-1.5%	N/A

HEADLINE COMMENTARY

Helen Dickinson OBE
Chief Executive | British Retail Consortium

"Consumers put the brakes on spending, with the slowest growth in 2025 so far. This was due largely to declines in Non-food sales, as fashion and full price big-ticket items were held back by lower consumer confidence. Gaming bucked the trend, thanks to some popular new releases. Food sales remained solid as the month saw the conclusion of football tournaments and two bank holidays, prompting spending on BBQs and picnics.

"Retailers are grappling with the £5bn extra costs from higher National Insurance contributions and wages, which kicked in during April. They also face an additional £2bn later this year from new packaging taxes and remain concerned about the consequences of the Employment Rights Bill. Ensuring the new Bill supports workers' rights without undermining retailers' ability to continue to provide jobs and investment in people will determine whether Government achieves economic growth across the country or not."

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

"While the sunshine continued, the pace of retail sales growth didn't in May. Early seasonal purchases were likely a factor, as was a dampening of some spending appetite as households reflected upon the recent combination of essential bill rises. But May still saw slight growth, driven mainly by food and drink, with non-food purchases falling overall.

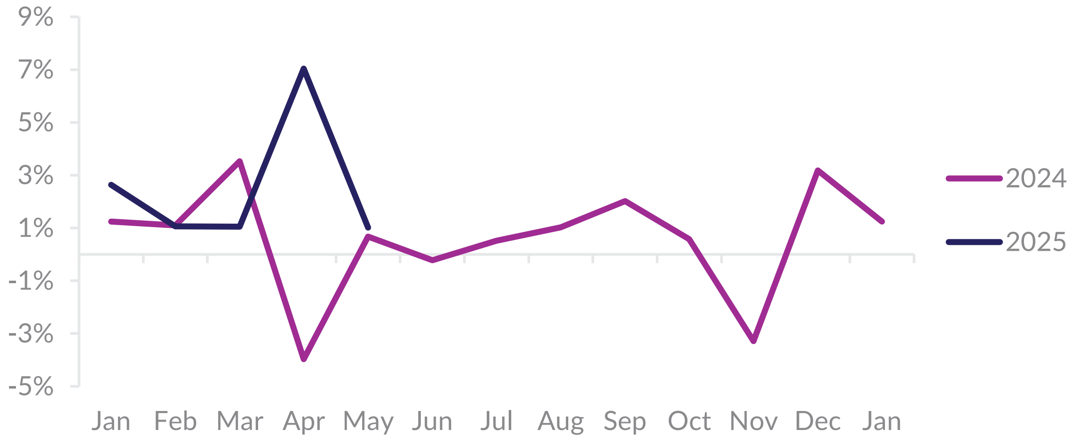
"Travel demand for the summer months ahead looks healthy, so retailers will be hoping June sees an upturn in related spending as people begin to think about what they want to pack in their suitcase."

Sarah Bradbury
Food & Drink sector performance, CEO | IGD

"After the sunniest spring on record and a string of bank holidays, our Shopper Confidence Index rose by five points in May, helped by the prospect of lower energy bills and renewed momentum in UK trade agreements with the US and EU. This uplift marks a welcome shift from 'Awful April', but beneath the surface, confidence remains fragile. Our research shows that shoppers are still navigating financial uncertainty and continue to rely on money-saving tactics like planning ahead and buying on promotion. While the mood has brightened, we've yet to see this translate into meaningful changes in behaviour. With the external environment still volatile, shoppers remain cautiously optimistic, but not necessarily ready to spend freely."

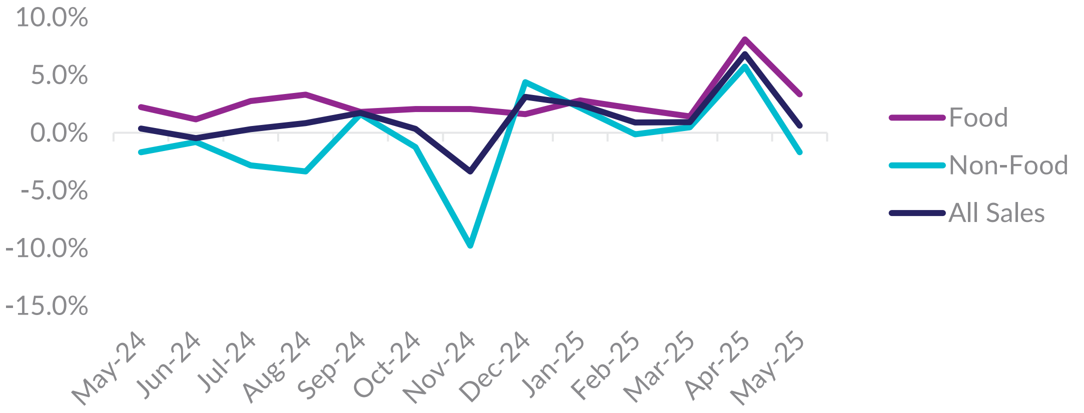
RETAIL SALES TRENDS

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
May-25	0.6%	1.0%
May-24	0.4%	0.7%
Apr-25	6.8%	7.0%
3m avg	2.6%	2.9%
12m avg	1.2%	1.4%

MONTHLY AVERAGE	LFL	TOTAL
Food	3.3%	3.6%
Non-food	-1.7%	-1.1%
All Sales	0.6%	1.0%

OVERVIEW

May saw an increase in total sales of 1% YOY, with Food up 3.6% and Non-Food declining 1.1%. This is the slowest YOY total sales growth so far in 2025. This very modest growth saw a levelling off in YOY movement, after the Easter related trough and peak in March and April.

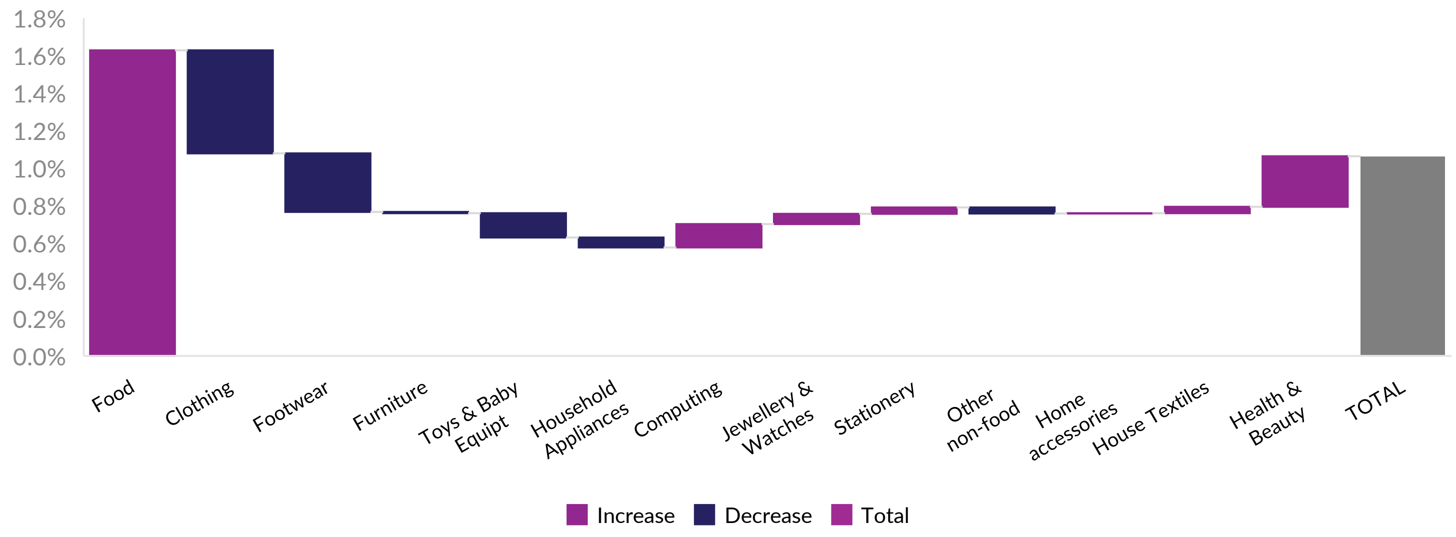
Retailers reported challenging results across Fashion and Footwear, with Women's Fashion, Footwear and Accessories being hardest hit. Full price big ticket items were moving slowly in May, reflecting consumer caution and some price sensitivity; televisions, sofas, dining furniture and curtains all struggled. One big ticket item had notable success, with pre-sales of the new Nintendo Switch 2 continuing to shine. Some retailers reported Switch 2 stock selling out almost as soon as it was made available to customers.

As we also saw in April, the careful management of stock levels and the refinement of product ranges played a crucial role in driving sales. Congratulations to the dedicated buyers, planners, logisticians, et al. who work ceaselessly behind the scenes to keep UK Retail on its feet.

Ian Bendelow

Senior Analyst

MAY: 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 Sales Benchmark, please contact:

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MONTHLY SALES TRENDS

FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % 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%		
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-May average	4.5%	4.7%	0.5%	0.7%	2.3%	2.5%
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

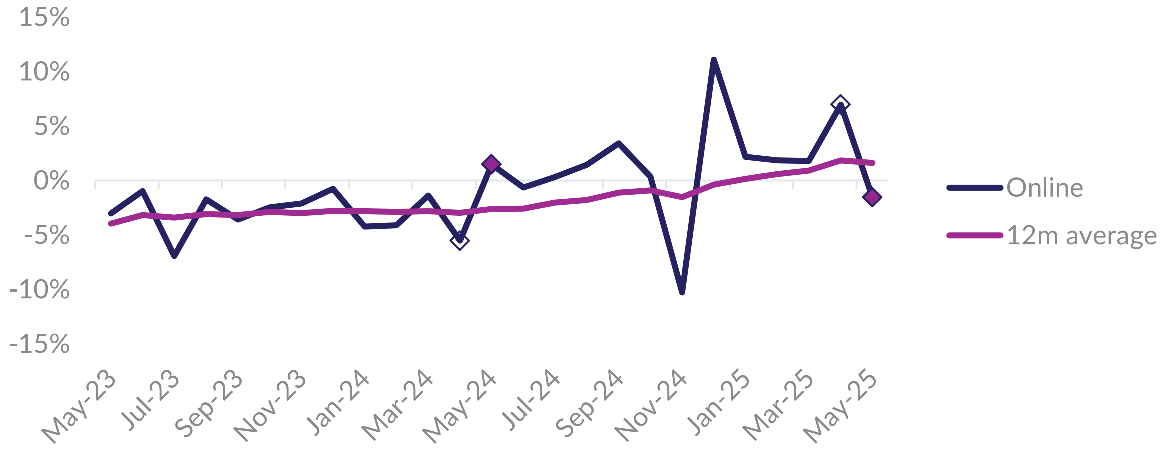
FOOD/NON-FOOD ANALYSIS: MONTHLY AVERAGE % CHANGE YEAR-ON-YEAR

MONTHLY AVERAGE	LFL			TOTAL		
	Food	Non-Food	All Sales	Food	Non-Food	All Sales
2024 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%
Apr	8.1%	5.7%	6.8%	8.2%	6.1%	7.0%
2025 May	3.3%	-1.7%	0.6%	3.6%	-1.1%	1.0%

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

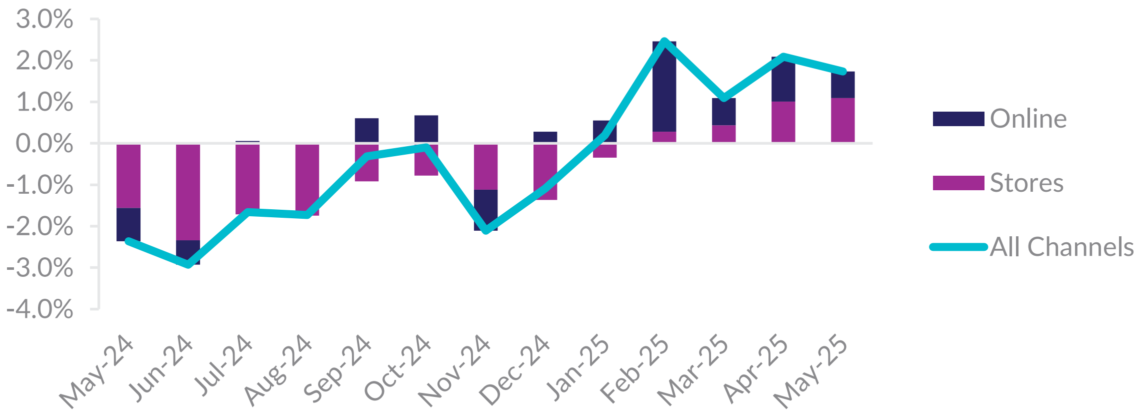
ONLINE VS IN-STORE

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)

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



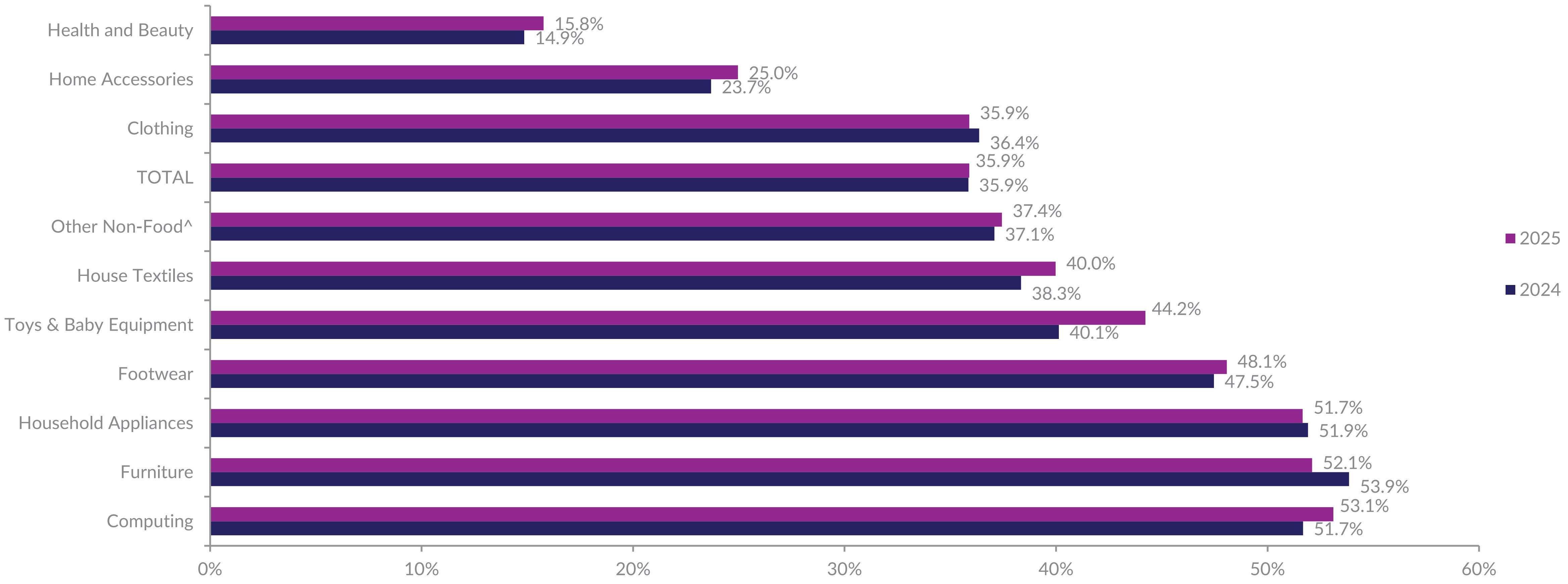
Source: BRC-KPMG RETAIL SALES MONITOR

NON-FOOD GROWTH	ONLINE*	UK TOTAL
May-25	-1.5%	-1.7%
May-24	1.5%	-1.7%
Apr-25	7.0%	5.7%
3m avg	2.4%	1.7%
12m avg	1.6%	0.1%

NON-FOOD IN-STORE % CHANGE YEAR-ON-YEAR		
	LFL	Total
May-25	-1.8%	-0.9%
May-24	-3.5%	-2.6%
Apr-25	5.0%	5.6%
3m avg	0.9%	1.4%
12m avg	-1.3%	-0.7%

ONLINE VS IN-STORE

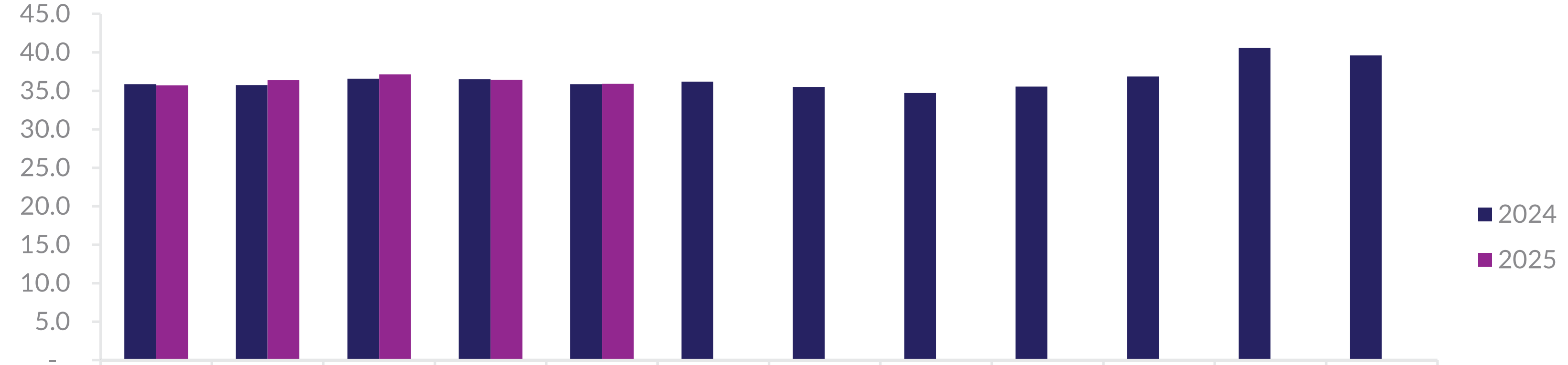
MAY: ONLINE PENETRATION RANKINGS BY CATEGORY



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	36.2	35.5	34.7	35.6	36.9	40.6	39.6
2025	35.7	36.4	37.1	36.4	35.9							

Source: BRC-KPMG RETAIL SALES MONITOR

NON-FOOD ONLINE PENETRATION RATE ONLINE AS % OF TOTAL	
May-25	35.9%
May-24	35.9%
Apr-25	36.4%
3m average	36.5%
12m average	36.7%

CATEGORY RANKINGS

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
May 2024	1.5%	-1.8%	35.9%	36.3%	0.6%	-0.8%
Jun	-0.7%	-1.5%	36.2%	36.2%	-0.2%	-0.6%
Jul	0.3%	0.3%	35.5%	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%	35.3%	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	7.0%	3.4%	36.4%	36.7%	2.4%	1.1%
May 2025	-1.5%	2.4%	35.9%	36.5%	-0.7%	0.6%

Source: BRC-KPMG Retail Sales Monitor.

CATEGORY RANKINGS

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

MONTH	TOTAL	LFL
May 2024	-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	5.6%	5.0%
May	-0.9%	-1.8%

Source: BRC-KPMG Retail Sales Monitor

CATEGORY RANKINGS

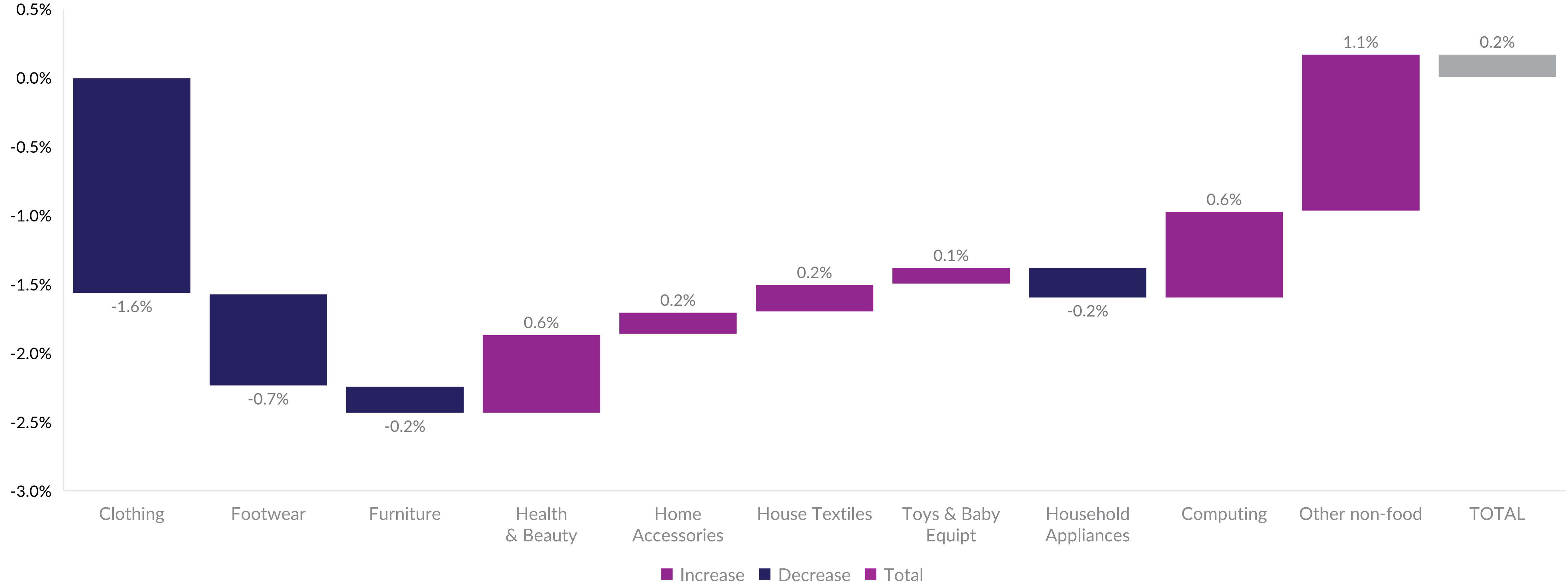
SECTOR PERFORMANCE: ONLINE SALES CATEGORY GROWTH RANKINGS

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

Source: BRC-KPMG RETAIL SALES MONITOR

CATEGORY RANKINGS

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



Source: BRC-KPMG RETAIL SALES MONITOR

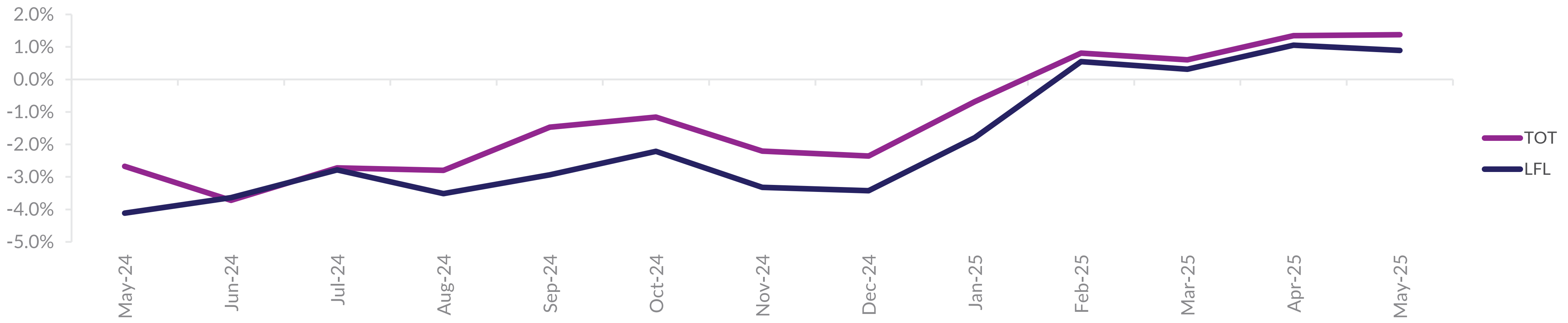
CATEGORY RANKINGS

SECTOR PERFORMANCE: STORE TOTAL SALES GROWTH

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

NON-FOOD TRENDS

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 June 2025 Monitor, covering the 5 weeks 01 June – 05 July 2025, will be released at 00.01am on Tuesday 15 June 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.

SPONSORED AND ADMINISTERED BY

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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: If you would like to participate in the Retail Sales Monitor, please contact:

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