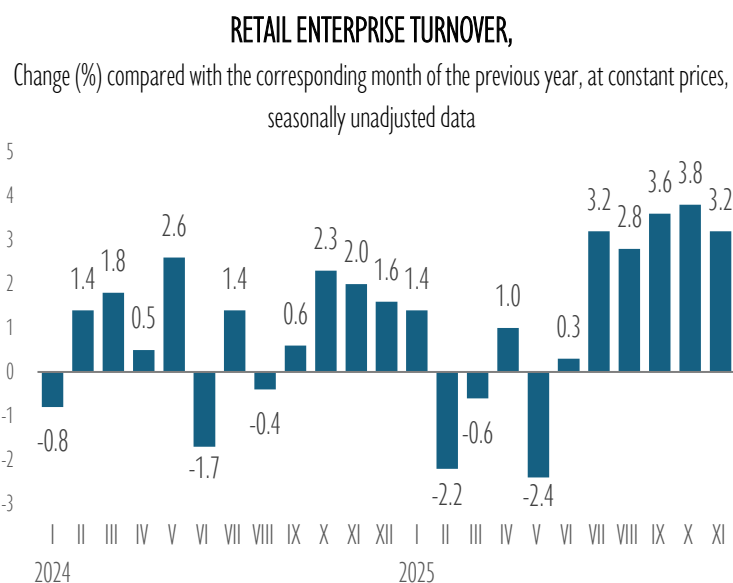


On Retail Turnover in November 2025

Stable growth continues in retail trade in November

In November 2025, retail turnover continued to increase, maintaining a stable growth trend. Over the year, the total turnover of retail enterprises at constant prices increased by 3.2% according to calendar-unadjusted data and by 3.3% according to calendar-adjusted data. As in previous months, the increase was mainly driven by non-food retail trade; a positive contribution to turnover growth also came from the food segment, where, after almost a year-long break, a slight increase in turnover was recorded for the second consecutive month, while growth also continued in fuel retailing. On a month-on-month basis, a moderate increase in retail turnover was observed—in November, compared with October, it rose by 0.3% (according to seasonally adjusted data). This was driven by growth in food and fuel retail trade, while non-food retail trade declined, possibly reflecting a wait-and-see consumer behaviour ahead of Christmas sales.



Overall, retail trade continues to develop in the direction of moderate growth, and the November results confirm a gradual increase in demand. In food retail trade, a slight increase has been recorded for the second month in a row, indicating a slow but sustained recovery after a period when high price levels significantly changed, shopping habits—residents became more frugal and focused more on essential goods. As price pressures ease, consumption is becoming more balanced; however, a cautious approach to spending remains. The non-food segment continues to be the main driver of growth, and the increase in fuel retailing persists, reflecting greater mobility and rising economic activity. In the coming months, demand will be supported by improvements in purchasing power, although high price levels and cautious spending will continue to constrain a more rapid increase in turnover.

In November, compared with November of the previous year, **non-food** retail turnover increased by 5.7%, with growth observed in almost all major non-food product groups, except for retail trade in sporting goods and games, where turnover decreased by 15.5%, and in the retail trade of clothing, footwear and leather goods (a decrease of 2.6%). Meanwhile, retail trade in books, newspapers, stationery, audio and video recordings remained almost unchanged (a decrease of 0.3%). The most rapid increase in turnover was recorded in the retail trade of information and communication technology equipment (16.6%). Strong growth was also observed in the retail trade of textiles, carpets, floor coverings, wallpapers, furniture, lighting equipment and other household goods (12.8%), retail trade of household electrical appliances in specialised stores (12.0%), retail trade of flowers, plants, seeds, fertilisers, pets and pet food (12.0%), retail trade of pharmaceutical and medical goods (10.4%), and retail trade of watches, jewellery and other new goods not elsewhere classified (10.0%). Higher turnover was also recorded in the retail trade of cosmetics and toilet articles (6.2%), while more moderate growth was observed in the retail trade of metal goods, tools, building materials and sanitary equipment (1.1%).

Food retail turnover increased year-on-year in November by 0.1%, maintaining the positive trend initiated in October after almost a year-long break. The increase was small, as it was constrained by a relatively high base—in November 2024, food turnover increased by 1%. This indicates that demand for food products is gradually becoming more stable as price pressures ease and everyday spending stabilises. Growth continued to be driven by increased turnover in non-specialised stores with a wider assortment of goods and more competitive prices, while turnover in specialised food stores continued to decline.

Fuel retail turnover at petrol stations increased by 1.6% in November compared with November 2024. The increase was partly driven by a relatively low base, as turnover growth in November 2024 was moderate. A significant role was also

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played by increased domestic mobility and economic activity, which remained at a high level after the autumn season, offsetting slightly higher fuel prices than a year earlier.

By type of retail outlet outside shops, turnover growth in November compared with the corresponding period of the previous year was observed both in retail trade at stalls and markets (2.5%) and in retail trade via mail order or the internet (5.7%). Growth at stalls and markets was partly driven by a low comparison base, as turnover in this segment declined significantly a year earlier. Meanwhile, in internet retailing, growth was supported by increased Black Friday shopping activity. In other retail trade outside shops, stalls and markets, turnover continued to increase significantly by 18.9%, driven by a very low base, as turnover in this segment declined sharply a year earlier.

Overall, in January–November of this year, retail turnover increased. Compared with January–November 2024, it was 1.3% higher. This was largely driven by an increase of 4.2% in non-food retail turnover. Food retail turnover decreased by 2.0%, while fuel retail turnover remained unchanged.