

On retail turnover in December 2025 and in 2025 as whole

In 2025, retail trade turnover increased by 1.4%

In 2025, the development of the retail sector was characterised by a gradual recovery and stabilisation of demand. Growth in real household incomes and a reduction in inflationary pressure contributed to an improvement in consumer sentiment; however, the still high price level and the experience of sharp price increases in previous years continued to influence shopping behaviour, maintaining a cautious approach to spending.

Overall, in 2025 retail trade turnover increased by 1.4%, indicating moderate but more sustained growth than in the previous year. Retail growth was mainly driven by non-food goods trade, where turnover rose by 4.2%, supported by a gradual recovery in consumer purchasing power and a greater willingness to make postponed purchases, particularly in the durable goods segment. Food retail trade turnover declined by 1.8%; however, the decrease slowed over the course of the year, reflecting easing price pressure and gradual stabilisation of demand, while restrained consumption patterns and a continued concentration of purchases in supermarkets persisted. Fuel retail trade turnover overall remained almost unchanged (an increase of 0.1%), as the effects of lower or volatile prices and more economical mobility were offset by gradually recovering mobility and economic activity during the year. Overall, the results of 2025 indicate a transition to a more balanced phase of retail development, where growth is increasingly based on real consumption and income improvements rather than base effects. At the same time, consumer behaviour remains cautious, limiting faster turnover growth, especially in the segment of essential goods.

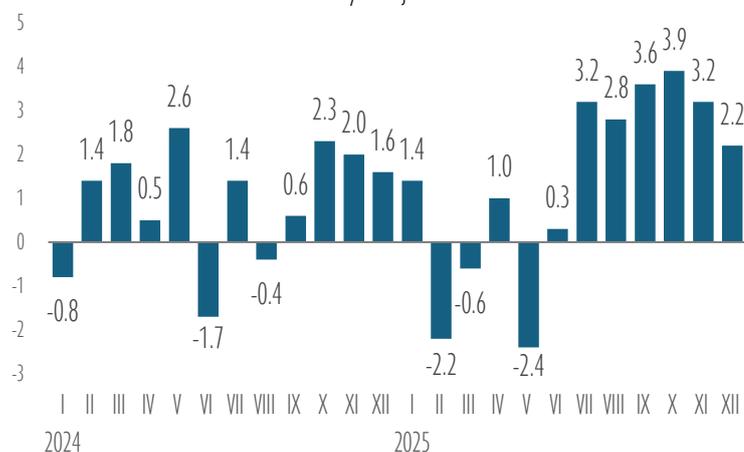
In December 2025, retail trade turnover continued to increase, maintaining a stable but moderate growth trend. Over the year, total turnover of retail enterprises at constant prices increased by 2.2% according to calendar-unadjusted data and by 0.8% according to calendar-adjusted data. As in previous months, the increase was mainly driven by non-food goods trade, with a positive contribution also from fuel retail trade, while turnover in the food segment remained almost unchanged year-on-year. At the same time, on a monthly basis a decrease in retail trade volume was observed. In December, compared with November, turnover declined by 0.8% (seasonally adjusted data), with the decrease affecting all three main product groups. This was most likely due to consumption normalizing after the November sales and more cautious spending plans at the end of the year.

Overall, retail trade in December 2025 closed the year in a regime of moderate growth, and data from the second half of the year increasingly clearly confirm stabilisation of demand across all main segments – food, non-food goods and fuel. After more pronounced fluctuations in the first half of the year, retail dynamics since summer have become more even, reflecting gradual adaptation to the high price level and a more resilient consumption structure.

In December, compared with December of the previous year, **non-food goods** retail trade turnover increased by 3.7%, with growth observed in almost all major non-food goods groups, except for retail trade in sporting goods and games, where turnover decreased by 12.2%, and in the trade of clothing, footwear and leather goods (a decrease of 5.6%). The fastest growth in turnover was recorded in the retail trade of pharmaceutical and medical goods (15.7%). Strong increases were also observed in the retail trade of watches, jewellery and other new goods not elsewhere classified (8.2%), retail trade of household electrical appliances in specialised stores (7.0%) and retail trade of information and communication technology equipment (6.8%). Higher turnover was also recorded in the retail trade of textiles, carpets, rugs, wall coverings, furniture, lighting equipment and other household goods (5.4%), retail trade of flowers, plants, seeds, fertilisers, pet animals and pet food (4.9%), retail trade of books, newspapers, stationery, audio and video

RETAIL TRADE ENTERPRISE TURNOVER,

Changes (%) compared with the corresponding month of the previous year, at constant prices, seasonally unadjusted data



recordings (4.1%) and retail trade of cosmetics and toiletries (3.6%), while more moderate growth was observed in the retail trade of hardware, tools, building materials and plumbing supplies (2.4%).

Food retail trade turnover in December was almost unchanged year-on-year, decreasing by 0.1%. The result can be assessed as relatively resilient, given the low comparison base in December of the previous year, when food retail trade declined significantly. This indicates that food consumption at the end of the year overall remained stable as price pressure eased, while cautious shopping habits continued to dominate. Growth continued to be driven by non-specialised stores with a broader assortment of goods, while turnover in specialised food stores continued to decline, reflecting consumers' concentration of shopping in supermarkets.

Fuel retail trade turnover at filling stations in December increased by 2.4% year-on-year. The increase was partly determined by a relatively low base, as turnover declined in December 2024, as well as by lower fuel prices than a year earlier, which supported consumption at the end of the year.

By type of retail outlet outside stores, turnover growth in December compared with the corresponding period of the previous year was observed in all main segments. In retail trade at stalls and markets, turnover increased by 1.9%, in retail trade via mail order or internet stores, turnover increased by 1.4%, while in other retail trade outside stores, stalls and markets, turnover increased by 4.8%. Growth at stalls and markets, as well as in other retail trade outside stores, was largely driven by a low comparison base, while growth in internet retail trade was constrained by a high base following a significant increase a year earlier.

Overall, looking ahead, **faster growth in retail trade is expected in 2026**, especially in the first half of the year, partly due to a relatively lower base. Consumer activity will continue to be supported by a gradual increase in purchasing power, driven by growth in wages and pensions after taxes, as well as a slowdown in the pace of price increases. At the same time, the high price level of previous years has led to persistent changes in consumption habits, therefore, rapid growth in turnover is not expected. Thus, in 2026 retail trade is likely to continue developing along a path of moderate, balanced growth, with the main emphasis on stable demand rather than rapid volume expansion.