

On Retail Trade Turnover in June 2025

Retail growth in June is driven by an increase in non-food trade turnover

After the decline in turnover in May, retail trade turnover in June 2025 increased slightly compared to June of the previous year – by 0.2% (according to unadjusted data). Faster growth was significantly slowed by the decline in food and fuel sales, while it was supported by the increase in non-food goods turnover. Retail trade volume also increased on a monthly basis – in June, compared to May, it rose by 0.7% (according to seasonally adjusted data), driven by higher non-food goods turnover.

In the coming months, retail trade turnover is likely to remain volatile but will gradually move towards moderate growth overall. Consumption will continue to be supported by rising household incomes and declining

interest rates, while lower food prices will allow households to reassess their spending structure and allocate more funds to other purchases. This trend was already evident in June, when, despite the decline in food and fuel segments, a significant increase was observed in non-food goods sales. However, overall consumer activity remains constrained by the high price level, which continues to burden household budgets.

In June, compared to the same month of the previous year, retail turnover of **non-food goods** increased by 4.4%. It rose across all major non-food categories, except in the sale of textiles, carpets, rugs, wallpaper, furniture, lighting equipment, and other household goods, where turnover decreased by 9.2%, and in the sale of books, newspapers, stationery, audio, and video recordings (down by 5.7%). Sales of cosmetics and toiletries remained practically unchanged (a decrease of 0.2%).

Compared to the same period of the previous year, the fastest growth in retail turnover in June was recorded in the sale of household electrical appliances in specialized stores (up by 13.4%) and in the sale of information and communication technology equipment (up by 11%). It also grew rapidly in the trade of flowers, plants, seeds, fertilizers, pets, and pet food (up by 7.3%), pharmaceutical and medical supplies (up by 7.1%), watches, jewellery, and other new goods not elsewhere classified (up by 5.7%), metal products, tools, construction materials, and plumbing equipment (up by 5.1%), and sporting goods and games (up by 5%). A more moderate increase was seen in the sale of clothing, footwear, and leather goods (up by 2.6%).

Retail food sales declined sharply by 4% year-on-year, largely due to the persistently high price level that continues to limit consumption. At the same time, a slight decrease in prices for essential goods also began to emerge in June, which may have reduced total turnover in nominal terms (euros), even if, in physical terms, households purchased the same or even larger quantities of food. Therefore, the drop in turnover does not necessarily indicate weaker consumption but may instead reflect lower prices for frequently purchased goods.

Retail fuel sales at gas stations fell by 2.2% in June compared to June 2024, despite lower fuel prices. This was likely influenced by lower fuel consumption, more economical driving habits, and more moderate travel activity.

By sales outlet, the decline in turnover in June compared to the same period of the previous year continued in retail trade at stalls and markets (by 3.9%), while it increased in other retail trade outside shops, stalls, and markets – by 1.4%. There was a slight decrease in turnover in retail trade by mail order or online (by 0.3%).

Overall, retail trade turnover decreased in January–June of this year. Compared to January–June 2024, it was 0.4% lower. This was largely driven by a 3.4% decline in retail trade turnover of food products. Retail trade turnover of non-food products increased by 2.2%, while fuel retail turnover decreased by 1.6%.

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