

On Retail Trade Turnover in July 2025

In July, retail trade turnover recorded its fastest growth since the end of 2022

In July 2025, the fastest annual growth in retail trade turnover since November 2022 was recorded – compared to July of the previous year, turnover increased by 3.4% (according to unadjusted data). The growth was mainly driven by a significant increase in non-food trade. There was also an increase in retail trade volume on a monthly basis – in July, compared to June, it rose by 1.3% (according to seasonally adjusted data), driven by higher turnover in both food and non-food goods.

In the coming months, retail trade turnover is likely to remain subject to fluctuations, although the overall trend will be towards gradual growth. The sharpest annual increase recorded in July since the end of

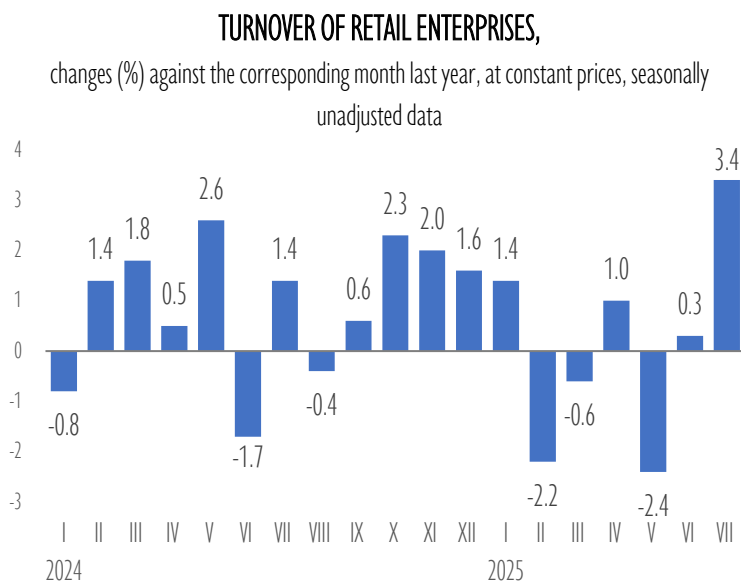
2022 mainly reflected growth in non-food trade, while the decline in the food segment was very small, thanks to large retailers' commitments to reduce the prices of essential food products. This allowed food trade to remain practically at the same level as the previous year, despite continued high price pressures. Fuel turnover in July was supported by lower prices than a year earlier. This shows that, as pressure on food and fuel prices eases, households retain the ability to redirect spending toward other segments, particularly non-food goods. However, overall consumption activity will continue to be limited by the high price level, which remains a strain on household budgets.

In July, compared to the same month of the previous year, retail turnover of **non-food goods** increased by 6.9%. It rose across all main non-food groups. In June, compared to the corresponding period of the previous year, retail turnover grew the fastest in sports goods and games (by 38.2%), while trade in cosmetics and toiletries remained virtually unchanged (a decrease of 22.5%). It also grew strongly in household electrical appliances sold in specialized stores (by 13.2%), books, newspapers, stationery, audio and video recordings (by 11.6%), pharmaceutical and medical supplies (by 10.2%), information and communication technology equipment (by 7.7%), and textiles, carpets, rugs, wallpaper, furniture, lighting equipment, and other household goods (by 7.3%). More moderate growth was observed in the trade of flowers, plants, seeds, fertilizers, pets and their feed (by 4.2%), watches, jewelry, and other new goods not elsewhere classified (by 4.1%), as well as metal products, tools, building materials, and plumbing (by 2.9%). Trade in clothing, footwear, and leather goods remained almost unchanged, with an increase of only 0.1%.

The retail turnover of **food products** decreased only slightly year-on-year – by 0.6%, mainly due to an increase in turnover in non-specialized retail stores that primarily sell food products, beverages, or tobacco, i.e., supermarkets. This indicates that in July the decline in prices for essential goods became increasingly evident, driven by the commitments of major retail chains to reduce prices (memorandum). This effect effectively kept the retail turnover of food products close to the previous year's level and limited the scale of the decline. Therefore, the small decrease does not indicate weaker consumption but rather reflects a lower price level for frequently purchased goods, even though in physical terms residents bought the same amount or even more food.

Fuel retail turnover at gas stations increased in July by 1.7% compared to July 2024, driven by lower fuel prices than in the same month of the previous year.

By type of sales outlet, turnover growth in July compared to the corresponding period of the previous year was observed in retail trade at stalls and markets (by 0.7%), as well as in other retail trade outside shops, stalls, and markets (by 0.3%). A slight increase was also recorded in retail trade by mail order or online (by 0.2%).



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Overall, in January–July of this year, retail trade turnover remained virtually unchanged. Compared to January–July 2024, it was 0.2% higher. This was largely driven by a 3.0% decline in food retail turnover. Retail trade in non-food products increased by 3.0%, while fuel retail turnover decreased by 1.1%.