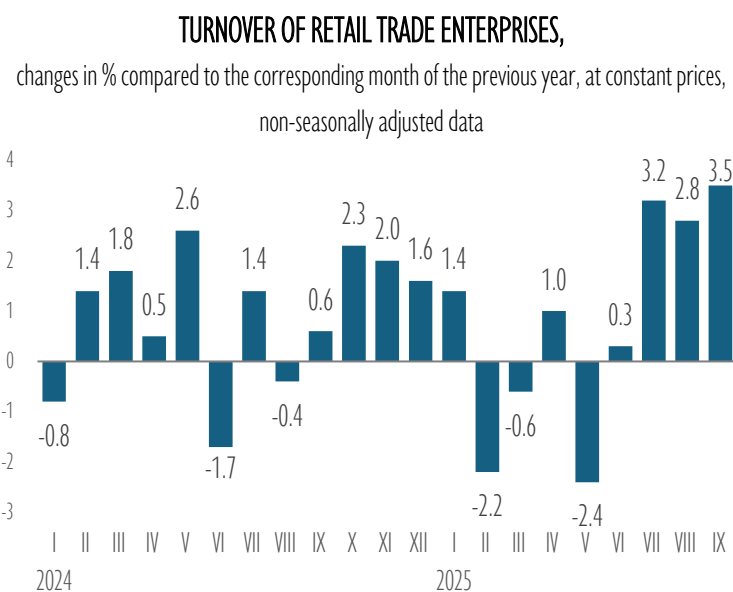


On Retail Turnover in September 2025

Retail turnover continued to increase in September

In September 2025, retail turnover continued to increase. Over the year, the total turnover of retail trade enterprises at constant prices increased by 3.5% according to non-calendar-adjusted data, and by 2.6% according to calendar-adjusted data. Growth was mainly driven by the increase in non-food retail trade, which remained at a similar pace as in the previous two months, while in September a significant contribution also came from the increase in fuel retail trade. The growth indicators were also partly influenced by the relatively low base, as retail turnover in September 2024 was particularly low. At the same time, it should be noted that a slight decline in the volume of retail trade was observed on a monthly basis. In September, compared to August, retail turnover fell by 0.7% (seasonally adjusted data), driven by a decrease in the non-food goods group, which most likely reflects a stabilisation of consumption after several months of rapid growth in non-food turnover, as households became more cautious about making larger purchases at the beginning of autumn.



In the coming months, retail turnover is likely to remain volatile, but the overall trend will still be towards moderate growth. In September, annual growth was ensured by the increase in non-food retail trade, which this month was also joined by a significant rise in fuel retail turnover. In the food segment, the decline in turnover was slight, supported by resilient consumption in supermarkets and lower prices for essential goods. From a year-on-year perspective, consumption continues to be supported by improving purchasing power and more stable consumer sentiment; however, the high price level and caution in spending will remain the main factors limiting faster growth in consumption.

In September, compared to September of the previous year, turnover in the retail sale of **non-food goods** increased by 6.4%, and growth was observed in almost all main non-food product groups. The fastest increase in turnover was recorded in the retail sale of watches, jewellery and other new goods not elsewhere classified (by 18.2%), as well as in the retail sale of textiles, carpets, rugs, wall and floor coverings, wallpaper, furniture, lighting equipment and other household articles (by 17.1%). Strong growth was also recorded in the retail sale of sporting goods and games (by 16.0%), pharmaceutical and medical goods (by 12.1%), flowers, plants, seeds, fertilisers, pet animals and pet food (by 12.0%), as well as in the retail sale of household electrical appliances in specialised stores (by 11.5%). Higher turnover was also observed in the retail sale of cosmetics and toiletries (by 6.7%) and books, newspapers, stationery, audio and video recordings (by 4.4%), while more moderate growth was recorded in the retail sale of clothing, footwear and leather goods (by 2.4%), information and communication technology equipment (by 2.2%), and metal goods, tools, building materials and plumbing supplies (by 0.6%).

Turnover in the retail sale of **food goods** decreased year-on-year in September by 0.4%, driven by a sharp decline in turnover in specialised food stores. By contrast, volumes increased in supermarkets, and given the low comparison base in September 2024, the overall decline remained very moderate. Consumers continue to choose supermarkets more often because of their wider assortment of goods, while the turnover of specialised food stores continued to decline.

Turnover in the retail sale of **fuel** at filling stations increased significantly in September – by 3% compared to September 2024, although fuel prices were slightly higher than a year earlier. The increase may have been supported by higher traffic intensity and more active economic activity after the summer season, as well as by greater domestic mobility and freight transport activity than a year earlier.

By type of sales outlet outside stores, turnover growth in September, compared to the corresponding period of the previous year, was observed both in retail sale via stalls and markets (by 5.8%), in retail sale by mail order or via the internet (by 7.3%), and in other retail sale not in stores, stalls or markets (by 6.9%).

Overall, in January–September of this year, retail turnover increased. Compared to January–September 2024, it was 0.8% higher. This was largely determined by a 3.8% increase in turnover in the retail sale of non-food goods. Turnover in the retail sale of food goods decreased by 2.5%, while turnover in the retail sale of fuel decreased by 0.6%.