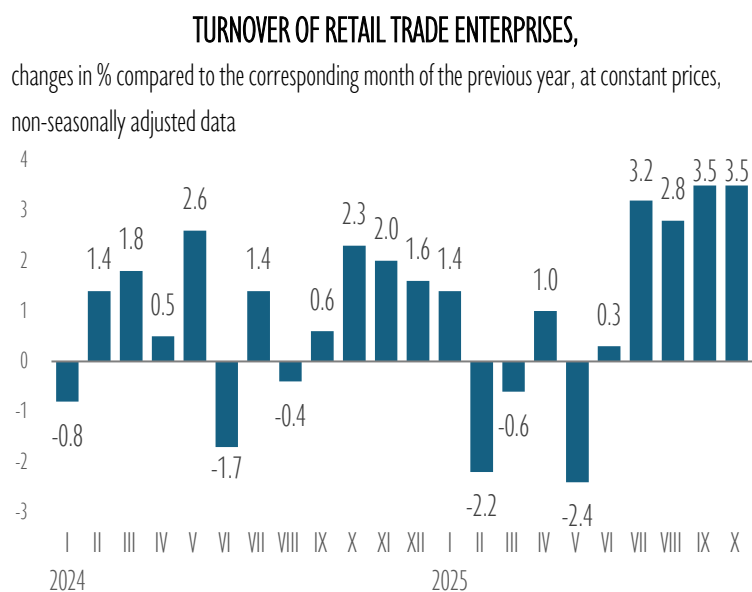


## On Retail Turnover in October 2025

## Stable growth in retail trade continued in October

In October 2025, retail turnover continued to increase, maintaining the trend of moderate growth. 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 4.8% according to calendar-adjusted data. As in previous months, the increase was mainly driven by growth in non-food retail trade, while in the food segment, after an interruption of almost a year, a slight increase in turnover was recorded. Strong growth also continued in fuel retail trade, where volumes increased for the second month in a row. An increase in retail trade volume was also observed on a monthly basis – in October, compared to September, it rose by 1.2% (according to seasonally adjusted data), driven by an increase in non-food and fuel turnover, while food trade remained almost unchanged, reflecting stable day-to-day consumption.



Overall, retail trade will continue to develop in the direction of moderate growth. In the short term, it will be supported by rising purchasing power and more stable incomes, but the high price level, caution and more frugal consumption habits will remain factors limiting faster growth. The October data confirm a gradual and increasingly balanced expansion of demand, where the basis of growth is increasingly becoming real consumption rather than statistical base effects. Although growth remains moderate, it covers both non-food goods and fuel, as well as, after a long interruption, food too. The non-food segment remained the main driver of growth also in October, continuing its stable pace of increase, supported by both improving consumer sentiment and more active purchases of certain product groups in the autumn season. The very moderate increase recorded in the food segment points to stabilisation – price pressure is easing, and household consumption is becoming more resilient.

In October, compared to October of the previous year, turnover in the retail sale of **non-food goods** increased by 5.8%, and growth was observed in almost all main non-food product groups, except in the retail sale of textiles, carpets, rugs, wall and floor coverings, wallpaper, furniture, lighting equipment and other household articles, where turnover declined by 5.7%, and in the retail sale of cosmetics and toiletries (a decrease of 1.1%). The fastest increase in turnover was recorded in the retail sale of household electrical appliances in specialised stores (by 16.0%), as well as in the retail sale of information and communication technology equipment (by 14.7%). Strong growth was also observed in the retail sale of pharmaceutical and medical goods (by 11.6%) and sporting goods and games (by 11.0%). Higher turnover was also recorded in the retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food (by 6.0%), while more moderate growth was observed in the retail sale of clothing, footwear and leather goods (by 2.3%), watches, jewellery and other new goods not elsewhere classified (by 1.7%), and metal goods, tools, building materials and plumbing supplies (by 1.4%). Meanwhile, turnover in the retail sale of books, newspapers, stationery, audio and video recordings remained unchanged.

Turnover in the retail sale of **food goods** increased year-on-year in October by 0.3%, which was the first increase since November 2024. This increase can only partly be explained by the base effect; more resilient demand and lower price pressure also played an important role. Growth was mainly driven by an increase in turnover in non-specialised stores mainly selling food products. Consumers continue to prefer supermarkets with a wider assortment of goods and more competitive prices, while the turnover of specialised food stores continued to decline.

Turnover in the retail sale of **fuel** at filling stations increased by 3.1% in October compared to October 2024, marking the second significant month of growth in a row. The increase was supported both by slightly lower fuel prices than a year earlier and, most likely, by higher traffic flows and more active economic activity after the summer season.

By type of sales outlet outside stores, a decline in turnover in October, compared to the corresponding period of the previous year, was observed both in retail sale via stalls and markets (by 2.4%) and in retail sale by mail order or via the internet (by 2.7%). This decline can partly be explained by the high comparison base in internet trade, which increased significantly in October last year, as well as by consumers' preference to shop more often in supermarkets. Meanwhile, in other retail sale not in stores, stalls or markets, turnover increased significantly – by 27%, driven by the very low base, as turnover in this segment fell sharply a year earlier, as well as possibly by increased activity in certain specialised itinerant or mobile retail services.

Overall, in January–October of this year, retail turnover increased. Compared to January–October 2024, it was 1.1% higher. This was largely determined by a 4.0% increase in turnover in the retail sale of non-food goods. Turnover in the retail sale of food goods decreased by 2.2%, while turnover in the retail sale of fuel decreased by 0.2%.