

On Retail Turnover in January 2026

Strong growth in retail trade at the beginning of the year

In January 2026, retail turnover increased sharply, continuing the stable growth trend seen in recent months. Over the year, the total turnover of retail trade enterprises at constant prices increased by 4.9% according to non-calendar-adjusted data (6.1% according to calendar-adjusted data), which was the fastest year-on-year increase since November 2022. As in previous months, the increase was mainly driven by the retail trade of non-food goods, while turnover in fuel retail trade also increased significantly, whereas a slight decline was observed in the food segment. An increase in retail trade volume was also observed on a monthly basis – in January, compared to December 2025, it rose by 2.7% (according to seasonally adjusted data), which was the fastest monthly increase since March 2022. This was driven by a pronounced increase in fuel turnover and significant growth in the retail trade of non-food goods, indicating more active consumption at the beginning of the year and strengthening demand in these segments, while food trade declined, pointing to still cautious day-to-day consumption dynamics.

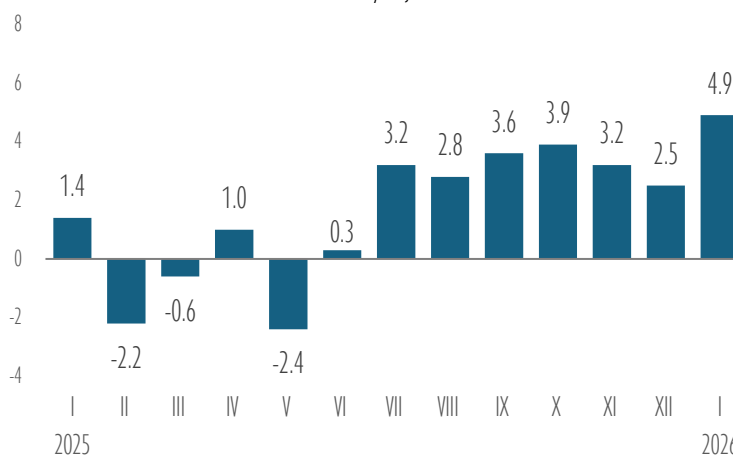
Overall, retail trade showed strong growth in January, confirming resilient consumer activity. The increase was mainly driven by the non-food goods segment, where demand remains stable, while fuel trade also increased significantly, reflecting greater mobility and a rise in economic activity. By contrast, the decline observed in the food segment indicates that the structure of consumption remains cautious and households continue to plan their day-to-day spending carefully. Overall, the data point to a broader recovery in demand beyond essential goods, while also marking a stronger pace of growth at the beginning of the year. In the coming months, faster growth in retail trade is expected, especially in the first half of the year, partly due to the relatively lower base and the gradual improvement in purchasing power. However, the high price level of previous years has reinforced more considered consumption habits, and therefore growth is likely to remain balanced rather than accelerate sharply.

In January, compared to January of the previous year, turnover in the retail sale of **non-food goods** increased by 7.4%, and growth was observed in almost all main non-food product groups, except in the retail sale of books, newspapers, stationery, audio and video recordings, where turnover declined by 18%, in the retail sale of household electrical appliances in specialised stores (a decline of 3.7%), and in the retail sale of cosmetics and toiletries (a decline of 3.2%). The fastest increase in turnover was recorded in the retail sale of sporting goods and games (by 47%), driven by favourable weather conditions for winter activities. Strong growth was also recorded in the retail sale of information and communication technology equipment (by 12.7%), pharmaceutical and medical goods (by 11.7%), metal goods, tools, building materials and plumbing supplies (by 11.1%), and clothing, footwear and leather goods (by 10.7%). Higher turnover was also observed in the retail sale of textiles, carpets, rugs, wall and floor coverings, wallpaper, furniture, lighting equipment and other household articles (by 5.5%) and watches, jewellery and other new goods not elsewhere classified (by 4.8%), while more moderate growth was recorded in the retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food (by 1.4%).

Turnover in the retail sale of **food goods** decreased by 1.6% year-on-year in January. The decline was more pronounced than in previous months, and for the first time since July, a decrease was also recorded in non-specialised stores with a wider assortment of goods. This indicates that food consumption remained cautious at the beginning of the year, despite the gradual easing of price pressure. At the same time, the turnover of specialised food stores continued to

TURNOVER OF RETAIL TRADE ENTERPRISES,

Changes in % compared to the corresponding month of the previous year, at constant prices,
non-seasonally adjusted data



decline sharply, reflecting a long-standing concentration of consumer shopping in supermarkets and structural changes in food retail trade.

Turnover in the retail sale of **fuel** at filling stations increased very sharply year-on-year in January – by 10.2%. The increase was partly amplified by the low comparison base, as turnover declined in January of the previous year, but to a large extent it also reflects a real increase in fuel consumption, supported by lower prices than a year earlier and more active mobility at the beginning of the year.

By type of sales outlet outside stores, a decline in turnover in January, compared to the corresponding period of the previous year, was observed in all main segments. Turnover in retail sale via stalls and markets declined by 4.4%, while both retail sale by mail order or via internet stores and other retail sale not in stores, stalls or markets declined by 3.1%. In internet trade, the decline was partly influenced by the high comparison base following the increase a year earlier, while in the other segments it reflected weaker consumer activity at the beginning of the year, as well as the possible impact of colder weather on outdoor retail trade.