

Retail Sales Dashboard



July 2026

A monthly overview of UK retail sales performance, including key metrics on core sub-sectors and e-commerce.

Headline Figures

+3.8%

Sales value (amount spent) growth
July 2026 vs. July 2025
*Seasonally adjusted, excluding fuel
Including fuel +4.3%

+2.3%

Sales volume (items purchased) growth
July 2026 vs. July 2025
*Seasonally adjusted, excluding fuel
Including fuel +1.6%

+5.9%

Sales value (amount spent) growth
Most recent 3 months YoY growth

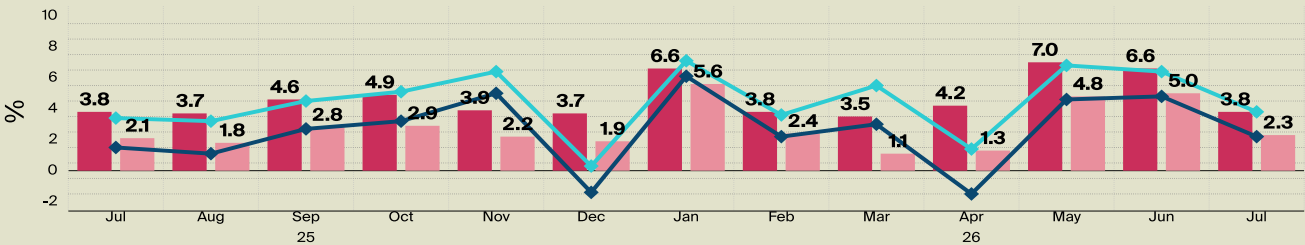
+4.1%

Sales volume (items purchased) growth
Most recent 3 months YoY growth

Monthly Performance – All Retail

(ONS) Year-on-year

■ Volumes (SA) ■ Values (SA) ◆ Values (NSA) ◆ Volumes (NSA)

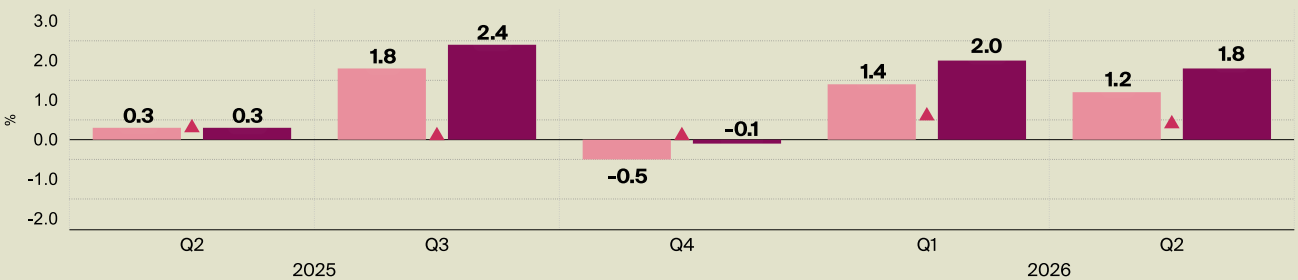


%	May	June	July
Non-Seasonally Adjusted Volumes	4.6	4.8	2.2
Values	6.8	6.4	3.8
Seasonally Adjusted Volumes	4.8	5.0	2.3
Values	7.0	6.6	3.8

Quarterly Performance vs. GDP

(ONS) Quarter-on-quarter

▲ GDP ■ Value ■ Volume



	2025			2026	
%	Q2	Q3	Q4	Q1	Q2
Volumes	0.3	1.8	(0.5)	1.4	1.2
Values	0.3	2.4	(0.1)	2.0	1.8
GDP Growth	0.3	0.1	0.1	0.6	0.4

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Key Messages

- An inevitable slowdown in July, following two bumper months in May and June. Retail sales values (exc fuel) were up +3.8% YoY, with volumes ahead by +2.3%.
- July 2026 was the hottest on record, but this did not prompt the anticipated uplift in grocery sales (vals. +1.4%, vols. -0.6%), while any positive impact on demand from the World Cup proved a red herring (e.g. sports stores sales down -4.4%).
- CPI increased to 2.9%, but shop price inflation actually declined, from 1.6% in June to 1.5% in July.
- Online sales declined -3.9% MoM (+6.5% YoY). Online penetration fell back -90bps to 28.3%, negating the previous month's increase.

Contact us

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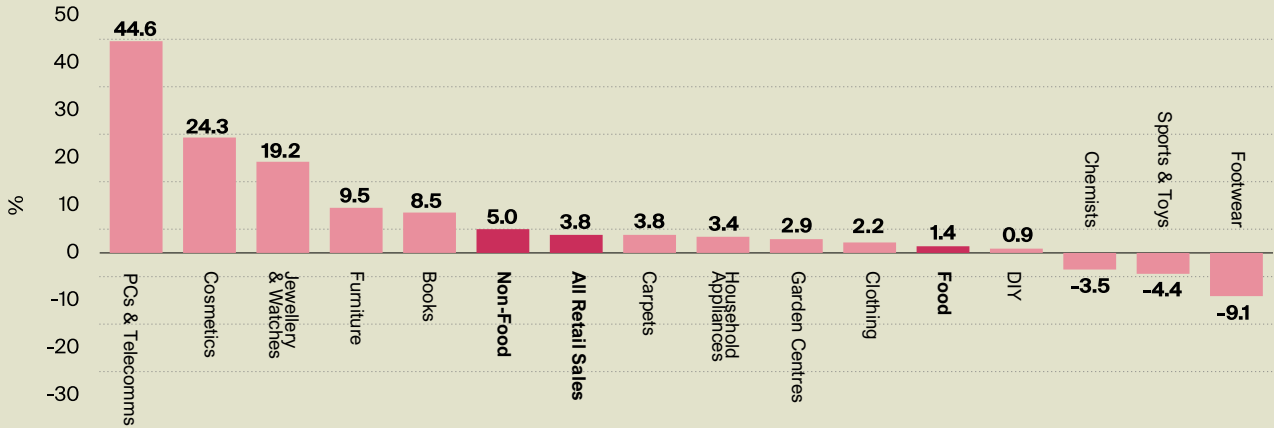
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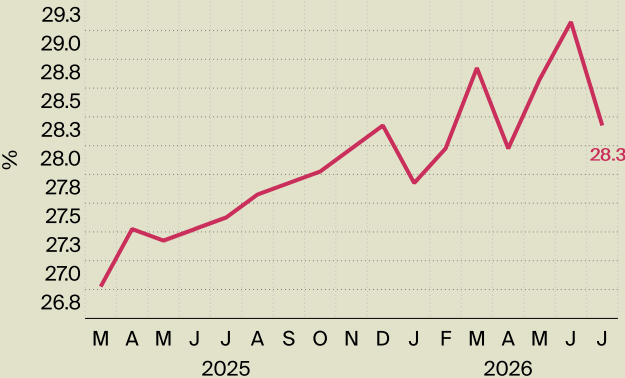
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ONLINE

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Monthly Performance by Sub - Sector
(ONS) Year-on-year seasonally adjusted sales values

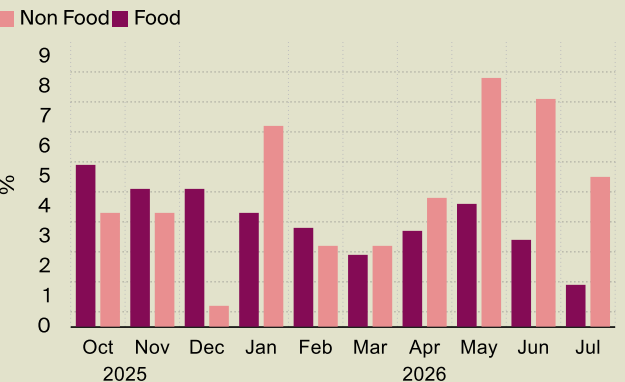


E-commerce Share of Retail Spend
(ONS) % penetration



%	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
E-commerce Share	28.1	28.3	27.8	28.1	28.8	28.1	28.7	29.2	28.3

Food vs. Non-Food Monthly Performance
(ONS) Year-on-year seasonally adjusted sales values



%	May	June	July
Non-Food	8.3	7.6	5.0
Food	4.1	2.9	1.4