Retail Sales Dashboard

September 2025 | A monthly overview of UK retail sales performance, including key metrics on core sub-sectors and e-commerce.

Headline Figures

+4.0%

Sales value (amount spent) growth
September 2025 vs. September 2024
*Seasonally adjusted, excluding fuel
Including fuel +3.1%

+2.3%

Sales volume (items purchased) growth
September 2025 vs. September 2024
*Seasonally adjusted, excluding fuel
Including fuel +1.5%

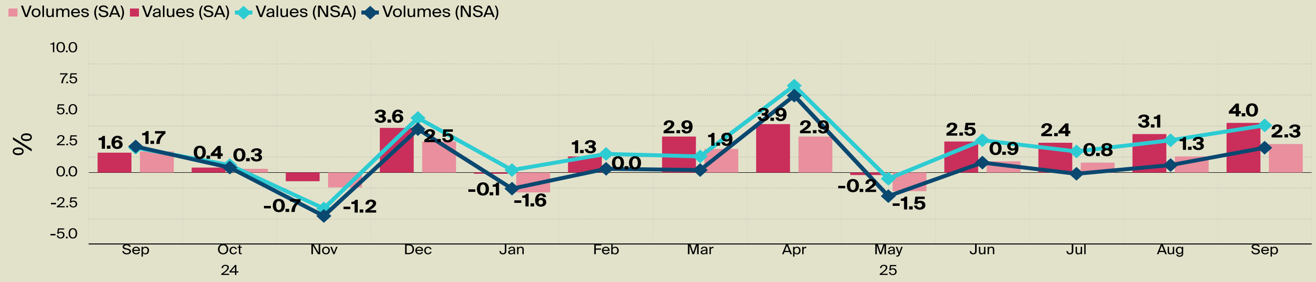
+3.2%

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

+1.5%

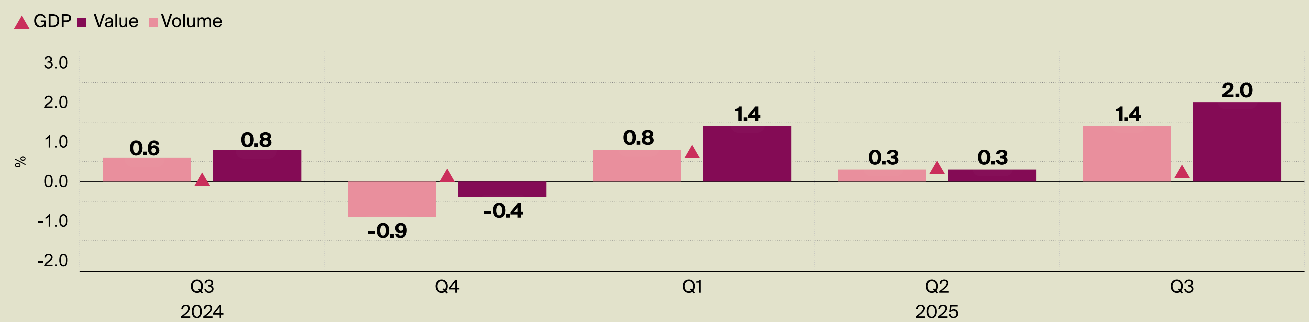
Sales volume (items purchased) growth
Most recent 3 months YoY growth

Monthly Performance – All Retail
(ONS) Year-on-year



%	July	August	September
Non-Seasonally Adjusted			
Volumes	(0.1)	0.6	2.0
Values	1.7	2.6	3.8
Seasonally Adjusted			
Volumes	0.8	1.3	2.3
Values	2.4	3.1	4.0

Quarterly Performance vs. GDP
(ONS) Quarter-on-quarter



%	2024		2025		
	Q3	Q4	Q1	Q2	Q3
Volumes	0.6	(0.9)	0.8	0.3	1.4
Values	0.8	(0.4)	1.4	0.3	2.0
GDP Growth	0.0	0.1	0.7	0.3	0.2

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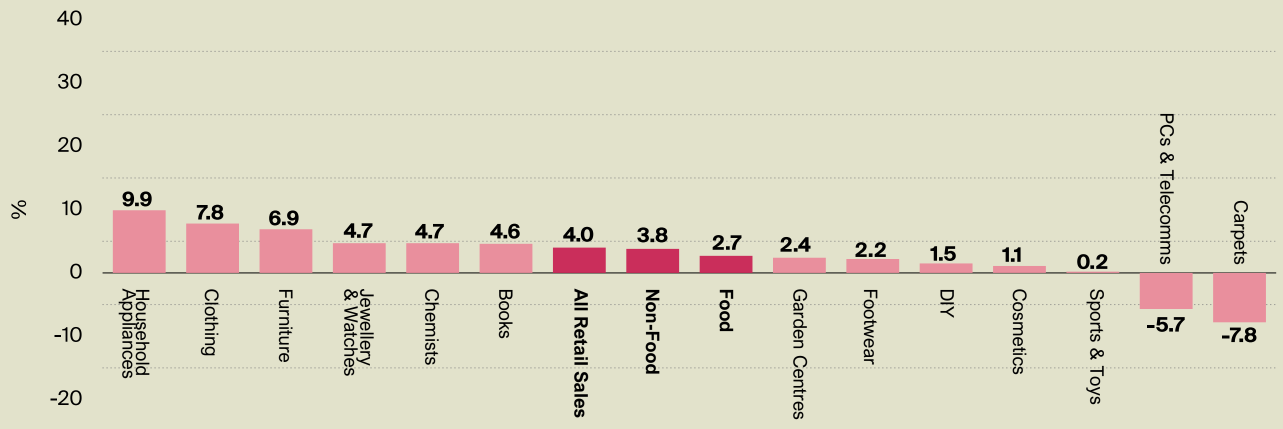
Key Messages

- A strong September - retail sales values grew year-on-year by +4.0%, while volumes were ahead by +2.3%.
- This capped a strong quarter. Q3 retail sales values were up year-on-year by +3.2% and volumes were up +1.5%. In both cases, this marked an accelerating positive trend on both Q1 and Q2.
- Non-Food was stronger (values +3.8%, volumes +3.1%) than Food (+2.7%, -0.7%). Despite significant revision to the data, Food volumes are still in decline, in sharp contrast to the narrative of the grocery retailers themselves.
- Online penetration stood at 28.0%, up +0.2 percentage points on August.

Monthly Performance by Sub - Sector

(ONS) Year-on-year seasonally adjusted sales values



Contact us

COMMERCIAL INSIGHT

Stephen Springham
Partner, Head of Retail Insight
+44 20 7861 1236
stephen.springham@knightfrank.com

Emma Barnstable
Associate, Commercial Insight
+44 20 8106 1385
emma.barnstable@knightfrank.com

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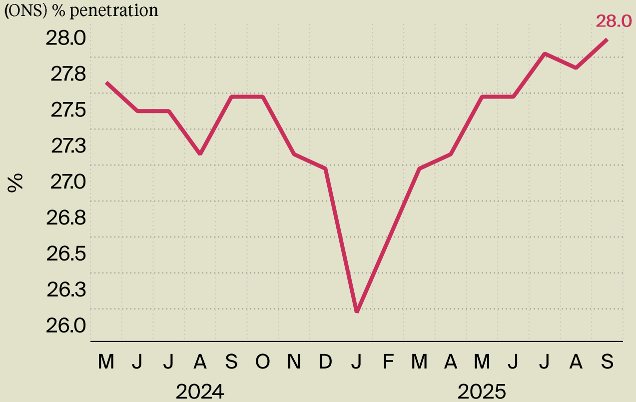
E-commerce Share of Retail Spend

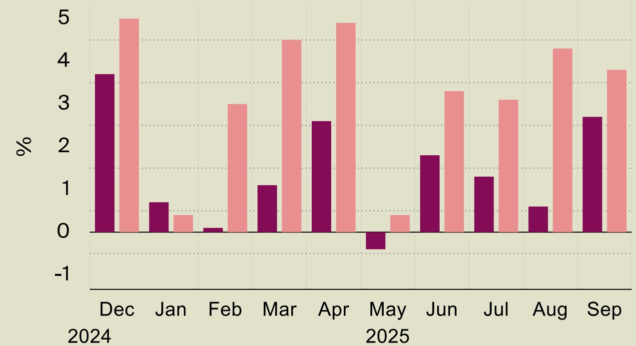
(ONS) % penetration



%	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
E-commerce Share	26.1	26.6	27.1	27.2	27.6	27.6	27.9	27.8	28.0

Food vs. Non-Food Monthly Performance

(ONS) Year-on-year seasonally adjusted sales values



	July	August	September
Non-Food	3.1	4.3	3.8
Food	1.3	0.6	2.7