statistics flash

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August 2025

RETAIL TRADE

- In August 2025, seasonally adjusted retail sales decreased by 0.1% in value and by 0.3% in volume compared with July 2025.
- In the three months to August 2025, retail sales rose by 0.8% in value and by 0.3% in volume compared with the previous three-month period.
- On a year-on-year basis, retail sales in August 2025 increased by 0.5% in value, while falling by 1.3% in volume.
- Compared with August 2024, retail sales grew by 2.5% in large-scale distribution, while small-scale retail declined by 2.2% and non-store sales by 2.6%. Online sales rose by 6.1% over the same period.
- Among non-food products, year-on-year trends varied across categories. The largest increase was recorded in Cosmetic and toilet articles (+5.4%), while the sharpest declines were observed in Electric household appliances, audio-video equipment and Pharmaceutical products (both -3.4%).

CHART 1. RETAIL TRADE, SEASONALLY ADJUSTED INDEX AND THREE-MONTH MOVING AVERAGE
January 2020 – August 2025, value (index, 2021=100)

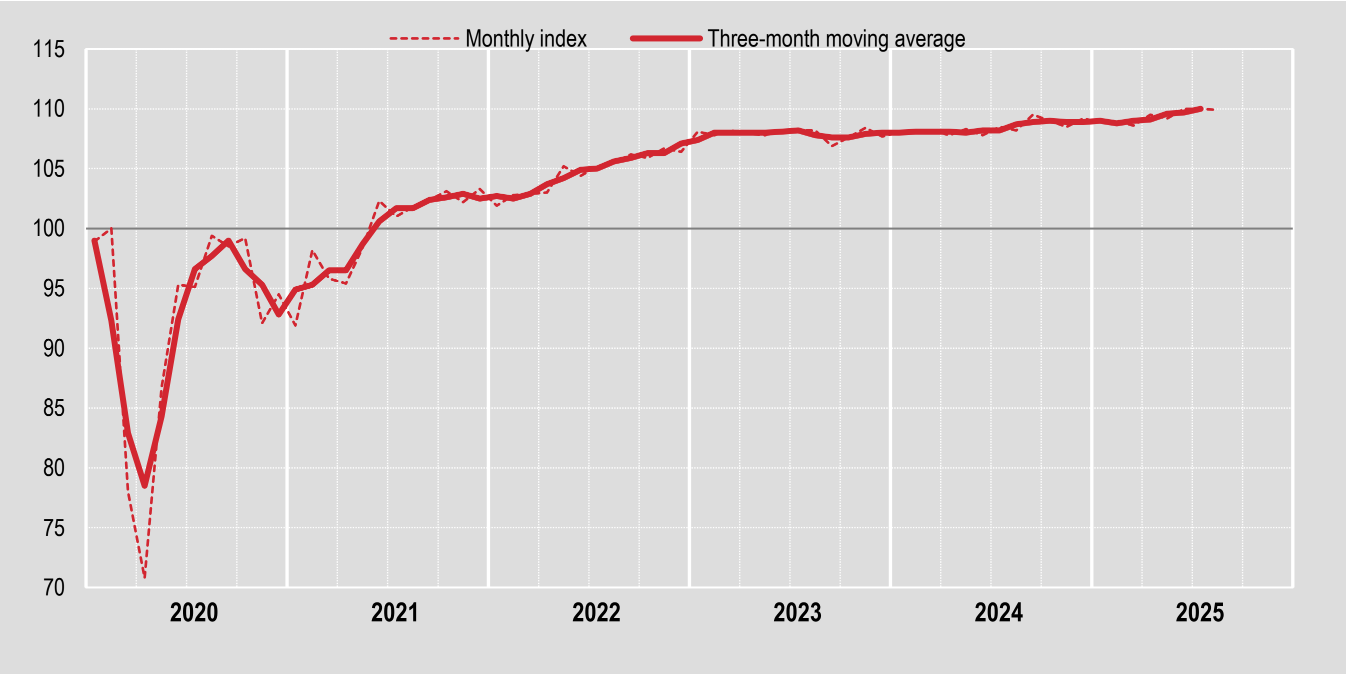


CHART 2. RETAIL TRADE, MONTH ON SAME MONTH A YEAR AGO PERCENTAGE CHANGES

January 2021 – August 2025, percentage changes in value and volume, non-seasonally adjusted (index, 2021=100)

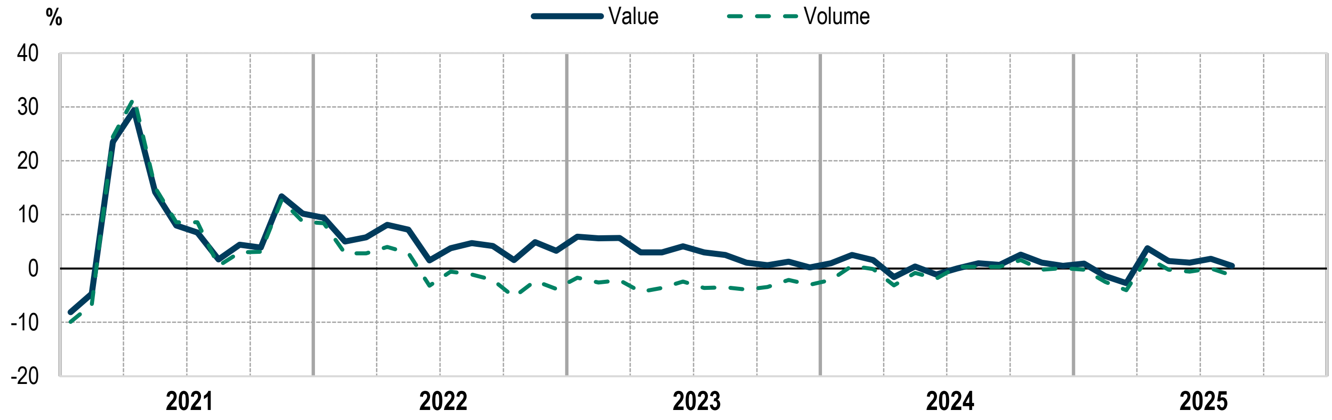


TABLE 1. RETAIL TRADE BY MARKETABLE GOODS SECTOR

August 2025, months on previous months and months on same months a year ago percentage changes in value and volume, seasonally adjusted and non-seasonally adjusted (index, 2021=100) (a)

MARKETABLE GOODS SECTOR	Months on previous months percentage changes (seasonally adjusted)			
	Aug25 / Jul25		Jun-Aug25 / Mar-May25	
	Value	Volume	Value	Volume
Food	-0.1	-0.4	+1.2	+0.2
Non food	-0.1	-0.2	+0.5	+0.3
Total	**-0.1**	**-0.3**	**+0.8**	**+0.3**
	Months on same months a year ago percentage changes (non-seasonally adjusted)			
	Aug25 / Aug24		Jan-Aug25 / Jan-Aug24	
	Value	Volume	Value	Volume
Food	+1.6	-2.2	+2.1	-1.0
Non food	-0.2	-0.6	-0.3	-0.7
Total	**+0.5**	**-1.3**	**+0.7**	**-0.9**

(a) Provisional data

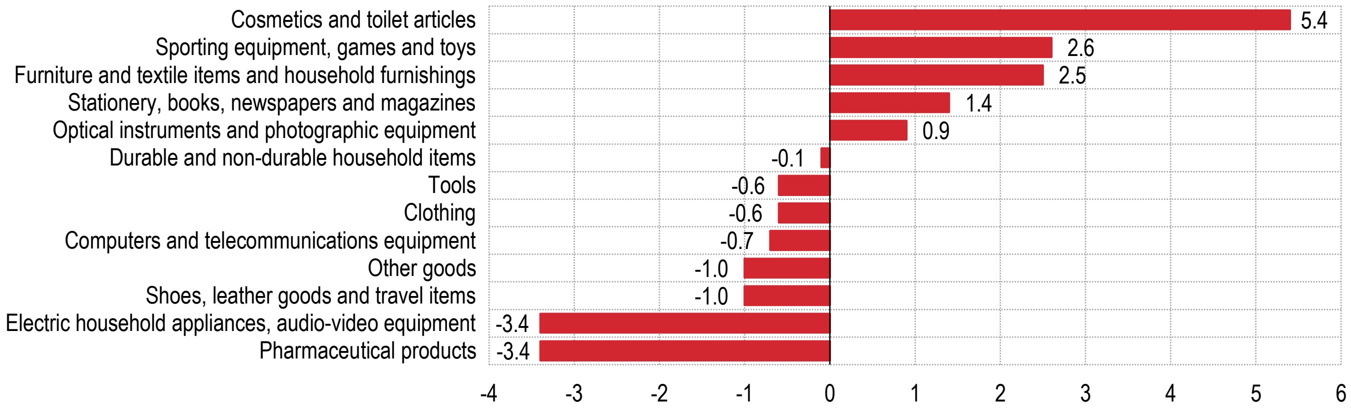
TABLE 2. RETAIL TRADE BY MARKETABLE GOODS SECTOR AND CHANNEL OF DISTRIBUTION

August 2025, months on same months a year ago percentage changes in value, non-seasonally adjusted (index, 2021=100) (a)

MARKETABLE GOODS SECTOR AND CHANNEL OF DISTRIBUTION	Aug25 / Aug24	Jan-Aug25 / Jan-Aug24
Large-scale distribution	**+2.5**	**+2.2**
Food	+2.6	+3.0
Non food	+2.1	+0.9
Small-scale distribution	**-2.2**	**-0.9**
Food	-1.2	-0.3
Non food	-2.5	-1.0
Non-store retail sales	**-2.6**	**-1.2**
Online sales	**+6.1**	**+0.7**
Total	**+0.5**	**+0.7**

(a) Provisional data

CHART 3. YEAR-ON-YEAR NON-FOOD GROWTH RATE BY PRODUCT SEGMENT
August 2025, months on same months a year ago value (index, 2021=100)



revisions

The table below shows routine revisions, calculated as differences (in percentage points) between first release and the latest estimates concerning growth rates of the same reference period. Revisions to year-on-year growth rate refer to not adjusted data of the last month prior to the current reference period. With regard to the short-term growth rate, an additional monthly revision for seasonally adjusted data occurs as new observations can change the seasonal factors that are applied to the whole time series.

Table 3 provides revised data for July 2025.

TABLE 3. REVISIONS TO GROWTH RATES BY MARKETABLE GOODS SECTOR
Differences in percentage points (index, 2021=100)

	Food sales		Non-food sales		Total sales	
	Month-on-month change (a)	Year-on-year change (b)	Month-on-month change (a)	Year-on-year change (b)	Month-on-month change (a)	Year-on-year change (b)
July 2025						
Value	0.0	0.0	0.0	0.0	0.0	0.0
Volume	0.0	+0.1	0.0	-0.1	0.0	0.0

(a) Figures are calculated on seasonally adjusted data
(b) Figures are calculated on non-seasonally adjusted data

glossary

Large-scale distribution: definition of this aggregate was revised according to the classification ATECO 2007 (Italian version of the Classification of Economic Activities NACE Rev.2). Large-scale distribution includes the following categories:

Non-specialized stores with food predominating

- *Hypermarket (Ateco 47111):* store combining a supermarket (food products) and a department store (non-food products), with a selling surface over 2.500 square metres.
- *Supermarket (Ateco 47112):* store operating in food retailing, organized as a self-service shop covering a surface area over 400 square metres and offering a wide variety of food (mainly canned and packaged goods), personal hygiene products, household cleaners and pet supplies.
- *Discount stores (Ateco 47113):* retail area selling wide assortments of goods (not name-brand) focusing on low prices rather than service, displays or variety.

Non-specialized stores with non-food predominating

- *Department store and non-specialized store selling computers, peripheral devices, telecoms equipment, consumer electronics (audio and video), electrical household appliances:* they both are retail establishments offering a wide range of predominantly non-food consumer goods. Both kinds of stores cover a floor space over 400 square metres and sell a wide range of products such as consumer electronics, household appliances, clothing, furniture and household supplies.

Large footprints specialized stores

- *Large footprints specialized store (or category killer store):* specialized store offering a deep product assortment within a given category with a footprints over 400 square metres. Category killer stores typically have a large-scale distribution business model.

Small retail store: retail store with a selling surface under 400 square metres. Both specialized stores and non-specialized stores may fall within this category. Among the latter ones, minimarkets (Ateco 47114), frozen food stores (Ateco 47115) and general stores (Ateco 47199) can be found.

E-commerce: electronic selling of goods over the internet network (Ateco 47911). The monthly indices refer to real-time sales transactions that occur as a consumer purchases an item from an online store, which predominantly operates in the e-commerce sector. Web sales performed by retailers that sell primarily in stores do not flow into e-commerce indicators.

Non-store retailing: (Ateco 478 and 479. except from 47911) sales taking place outside of fixed retail stores. Non-store distribution channel includes market stands, mail and catalogue ordering, automated vending, sales representatives and telesales.

Value of sales index: the value of sales index measures the retail trade turnover over time at current prices.

Volume of sales index: the volume of sales index measures the retail trade turnover over time in volume terms (quantity sold). In order to determine the volume of sales index, the value of sales index is divided by the Harmonised index of consumer price (HICP) to allow removing price effects on turnover.

Seasonally adjusted data: seasonally adjusted data refer to the statistical technique designed to remove fluctuations related to seasonal factors (such as weather conditions, administrative measures, etc.) and calendar effects when relevant. Seasonal adjustment provides a clearer view for a trend analysis of a short-term index.

Short-term growth rate: short-term growth rate compares a period (typically a month or quarter) with the previous period, measuring the percentage change.

Year-on-year growth rate: Y-o-Y growth rate compares a period (typically a month or quarter) with the same period from the previous year, measuring the percentage change.

Information objectives and reference regulatory framework

The Retail trade index is compiled using data from the monthly survey on retail sales.

This survey refers to enterprises whose main economic activity is retail trade (according to the Economic activity classification NACE Rev.2).

Enterprises having the sale of car and fuel as main economic activity are excluded from the survey.

The legal basis for the STS indicators are the Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics, repealing 10 legal acts in the field of business statistics (EBS-Regulation) and the Commission Implementing Regulation 2020/1197 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 (General Implementing Act).

Index base year

The base year for time series of Retail trade indicators is 2021. Indicators are calculated with reference to the classification of the economic activity Ateco 2007 (the Italian version of the European classification Nace Rev. 2)

The series of monthly indices of retail trade based 2021=100 referring to the period January 2021-December 2023 replace the indices previously disseminated, updating the base year from 2015 to 2021.

Time series (data for the period January 2000 – December 2020) have been rescaled to the base 2021, in order to meet users' needs and for research purposes.

Sampling design

Retail trade data are collected from a sample of about 8.000 enterprises, resident in Italy.

The sample is stratified considering the following variables:

- ✓ main activity according to the classification Ateco 2007
- ✓ enterprise size, identified on the basis of three classes of persons employed (1-5, 6-49 and at least 50).

According to the sampling scheme, enterprises with less than 50 persons employed are selected at random, while all the units with 50 or more persons employed are included in the sample.

The weight structure has been updated with reference to the base 2021. In particular, weights of the large distribution in terms of turnover is equal to 46.2%, while the weight of small scale distribution enterprises is 45.5%; weights for e-commerce and non-store retail trade are 5.0% and 3.3% respectively. In the next table, the weight structure of 2021-based indices is compared to the one referred to the base 2015.

TABLE 1. WEIGHTING STRUCTURE OF MONTHLY RETAIL SALES INDEX
Percentage values

Aggregates	base 2015	base 2021
TYPE OF DISTRIBUTION		
Small scale distribution	**48.0**	**45.5**
Large scale distribution	**46.4**	**46.2**
-Non-specialised large-scale retail	36.7	36.5
Food predominant	33.7	32.5
- Hypermarkets	11.6	8.5
- Supermarkets	16.7	17.5
- Discount stores	5.4	6.5
Non-food predominant	3.0	4.0
- Large scale specialised stores	9.7	9.7
E-commerce	**1.9**	**5.0**
Non-store retailing	**3.7**	**3.3**
PRODUCT GROUPING		
Food products	**42.2**	**41.2**
Non-food products	**57.8**	**58.8**
Pharmaceuticals and other therapeutic products	8.4	8.3
Clothing	11.9	10.0
Shoes, leather goods and travel items	3.4	2.9
Furniture and textile items and household furnishings	4.5	4.9
Electric household appliances, audio-video equipment	3.3	2.6
Computers and telecommunications equipment	2.6	3.7
Optical instruments and photographic equipment	1.3	1.2
Durable and non-durable household items	2.1	2.2
Household tools and hardware	4.1	5.8
Cosmetic and toilet articles	3.0	3.3
Stationery, books, newspapers and magazines	1.9	1.6
Sporting equipment. games and toys	2.5	2.7
Other goods	8.8	9.6
SIZE OF ENTERPRISES (PERSONS EMPLOYED)		
1-5	28.4	25.0
6- 49	25.4	25.5
50 or more	46.2	49.5

Value and volume index

The retail trade value index is a short-term measure of the changes in the value of sales by Italian retailers. It reflects the effect of both volume and price. In order to determine estimates on the volume of sales, value of sales indices are processed to allow removing price effects on turnover, using the Harmonised index of consumer price (HICP).

Data revision and seasonal effects

Monthly data are revised in the following month after the first publication. The revision is made in order to take into account the additional information from the respondents.

Indices are seasonally adjusted through the Tramo-Seats+ procedure. Like other seasonal adjustment procedures. Tramo Seats is based on the hypothesis that monthly or quarterly time series result from unobservable components:

- ✓ trend-cycle component (long-term and medium-term movements in the data);
- ✓ seasonal component (periodical short-term movements having a length of no more than one year);
- ✓ irregular component (unpredictable movements in the data).

Tramo-Seats uses a *model-based* method that is a statistical model that explain the behaviour of the original time series and its components.

In particular, food and non-food series are seasonally adjusted and aggregate seasonally adjusted estimates are then be derived.

Seasonal adjusted data are revised every month as a consequence of the re-estimation of the seasonal adjustment factors, which are also reviewed annually.

The exceptional variations in raw data recorded during the 2020-21 health emergency were handled according to the guidelines issued by Eurostat, available at the URL:

https://ec.europa.eu/eurostat/documents/10186/10693286/Time_series_treatment_guidance.pdf

Territorial breakdown

Indices are calculated and disseminated at national level.

Timeliness

Indices are published on a monthly basis with a delay of approximately 38 days from the end of the reference month.

Dissemination

Data are issued through press releases, available on the Istat website at http://www.istat.it/en.

The series of the updated indices are published on the Istat data warehouse IstatData.

For technical and methodological information

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