SHOPPING CENTRE
COUNCIL OF AUSTRALIA

RESEARCH NOTE

RETAIL TRADE TREND ESTIMATE INCREASED BY 0.1 PER CENT IN APRIL 2025 AND BY 3.8 PER CENT YEAR-ON-YEAR

Friday, May 30 2025 - The latest release (April 2025) of the monthly ABS Retail Trade data indicates that the overall month-on-month (m-o-m) **trend** series increased by 0.1 per cent, down from 0.2 per cent in March 2025. In **trend** terms, Retail Turnover increased by 3.8 per cent year-on-year (y-o-y), down from (a revised) 3.9 per cent in the pcp.

STATE OF PLAY

The adjacent table summarises the key data in **seasonally adjusted** terms across the six ABS retail categories. The strongest growth was recorded for 'Cafes, restaurants and takeaway food services' retailing on a m-o-m basis (up 1.1 per cent), whilst 'Other' retailing (up 5.4 per cent) was the strongest performing category on a y-o-y basis. In **seasonally adjusted** terms, Retail Turnover decreased by 0.1 per cent in the month of April 2025, down from 0.3 per cent in the prior month. On a y-o-y basis, Retail Turnover increased by 3.8 per cent, down from 4.3 per cent in the pcp.

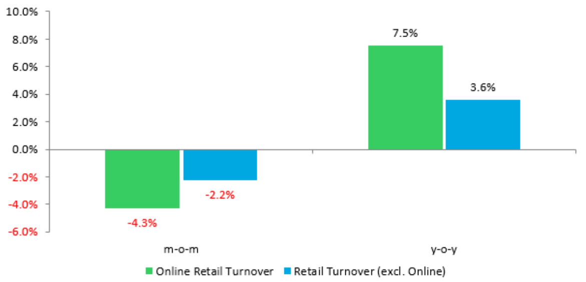
CATEGORIES	$ billion	m-o-m	last 3 months	y-o-y
Food retailing	$14.86	↓ -0.3%	↑ 1.1%	↑ 4.2%
Household goods retailing	$5.92	↑ 0.6%	↑ 0.2%	↑ 3.7%
Clothing, footwear and personal accessory retailing	$3.01	↓ -2.5%	↓ -2.4%	↑ 1.5%
Department stores	$1.90	↓ -2.5%	↓ -1.8%	↑ 0.0%
Other retailing	$5.92	↑ 0.7%	↑ 0.6%	↑ 5.4%
Cafes, restaurants and takeaway food services	$5.61	↑ 1.1%	↑ 0.7%	↑ 3.6%
Retail Turnover	**$37.21**	**↓ -0.1%**	**↑ 0.4%**	**↑ 3.8%**

Source: ABS / SCCA Research *Seasonally Adjusted

TREND ANALYSIS: ONLINE RETAIL TURNOVER

According to the 'experimental estimates of online retail turnover', online retail turnover decreased by 4.3 per cent on a m-o-m basis in April 2025 in 'original' terms. By comparison, 'traditional retail turnover' (i.e. retail turnover less online) decreased by 2.2 per cent m-o-m. On a y-o-y basis, online retail turnover increased by 7.5 per cent versus traditional retail turnover growth of 3.6 per cent over the same timeframe.

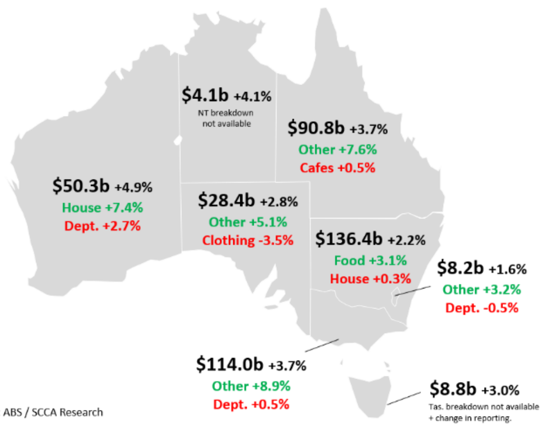
ABS Retail Trade - Online vs. Traditional Retail
Percentage Change by Type



Source: SCCA Research / ABS

STATE BY STATE: BEST AND WORST

Retail turnover varies within the ABS defined six categories and across different jurisdictions. The adjacent map outlines and compares the total and growth of retail trade (y-o-y), and the best and worst retail growth categories. The strongest jurisdictions in **seasonally adjusted** terms were Western Australia (up 4.9 per cent to $50.3 billion) followed by the Northern Territory (up 4.1 per cent to $4.1 billion) and Queensland (up 3.7 per cent to $90.8 billion). The Australian Capital Territory (up 1.6 per cent to $8.2 billion) was the worst performing jurisdiction in percentage terms. The highest growth across most jurisdictions was recorded for 'Other' retailing, whilst the weakest categories across all jurisdictions were those considered as 'discretionary' spending. South Australia and the ACT were the only jurisdictions that did not record positive growth across all six categories.



Source: ABS / SCCA Research