SHOPPING CENTRE
COUNCIL OF AUSTRALIA

RESEARCH NOTE

RETAIL TRADE TREND ESTIMATE INCREASED BY 0.4 PER CENT IN JUNE 2025 AND BY 4.2 PER CENT YEAR-ON-YEAR

Thursday, July 31 2025 - The final release (June 2025) of the monthly ABS Retail Trade data indicates that the overall month-on-month (m-o-m) **trend** series increased by 0.4 per cent, equal to (a revised) 0.4 per cent in May 2025. In **trend** terms, Retail Turnover increased by 4.2 per cent year-on-year (y-o-y), up from (a revised) 4.1 per cent in the pcp.

STATE OF PLAY

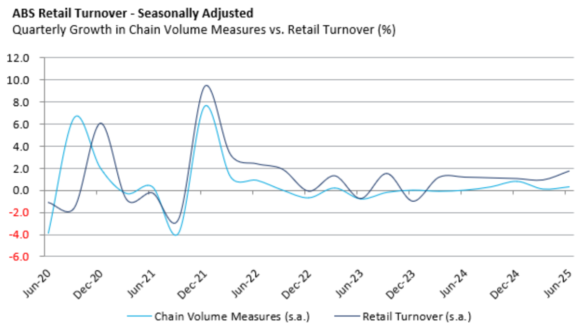
The adjacent table summarises the key data in **seasonally adjusted** terms across the six ABS retail categories. The strongest growth was recorded for 'Household goods' retailing on a m-o-m basis (up 2.3 per cent), whilst 'Other' retailing (up 6.0 per cent) was the strongest performing category on a y-o-y basis. In **seasonally adjusted** terms, Retail Turnover increased by 1.2 per cent in the month of June 2025, up from 0.5 per cent in the prior month. On a y-o-y basis, Retail Turnover increased by 4.9 per cent, up from (a revised) 3.5 per cent in the pcp.

CATEGORIES	$ billion	m-o-m	last 3 months	y-o-y
Food retailing	$15.00	↑ 0.9%	↑ 0.7%	↑ 4.0%
Household goods retailing	$6.13	↑ 2.3%	↑ 3.8%	↑ 5.6%
Clothing, footwear and personal accessory retailing	$3.16	↑ 1.5%	↑ 2.2%	↑ 6.0%
Department stores	$1.99	↑ 1.9%	↑ 1.9%	↑ 5.9%
Other retailing	$6.05	↑ 1.9%	↑ 2.8%	↑ 6.9%
Cafes, restaurants and takeaway food services	$5.58	↓ -0.4%	↑ 0.8%	↑ 3.3%
Retail Turnover	**$37.91**	**↑ 1.2%**	**↑ 1.7%**	**↑ 4.9%**

Source: ABS / SCCA Research *Seasonally Adjusted

TREND ANALYSIS: CHAIN VOLUME MEASURES

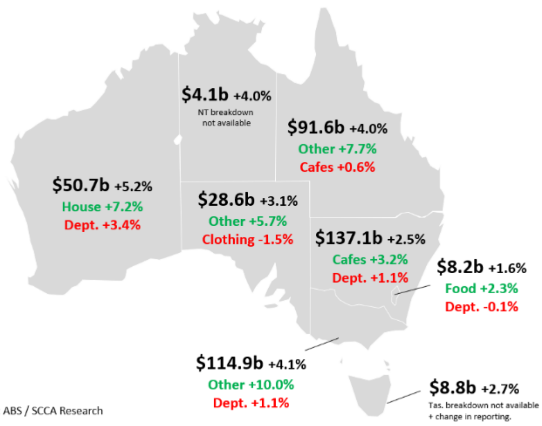
The quarterly chain volume measure estimates the change in value after the direct effects of price changes have been eliminated, reflecting changes in volume. In the June 2025 quarter, Chain Volume Measures increased by 0.3 per cent, up from (a revised) 0.1 per cent in the pcp. Retail Turnover increased by 1.7 per cent in the June 2025 quarter, up from 0.9 per cent in the pcp. Chain Volume Measures are tracking ahead of Retail Turnover, indicating that price inflation is having a less significant impact on retail spending.



Source: ABS / SCCA Research

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 5.2 per cent to $50.7 billion) followed by Victoria (up 4.1 per cent to $114.9 billion) and Queensland (up 4.0 per cent to $91.6 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