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Monthly survey on retail trade 2020Jul

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In July, dynamic sales partially offset the accumulated losses for some industrial

goods, but the catch-up remained limited overall.

Total industrial goods and food sales : year-on-year change (%)

Notes and July 2020, y-o-y comparison; seasonally and working-day adjusted volume terms

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Sectors are classified according to the relative weight of the products included in the total aggregate of retail

trade (see methodology) retail-trade-july-2020.pdf

CEM: DET_2023_en_retail-trade-july-2020.pdf

The trend in retail sales does not reflect that of total household consumption: the latter includes other items

such as healthcare, education and rents, which have been less affected by the crisis.

The aggregated and by sub-sector series are seasonally adjusted on an individual basis: the seasonally

adjusted series do not represent the sum of the seasonally adjusted components.

In July, turnover in retail trade rose by 4.5 % year-on-year (adjusted for seasonal and working-day variations) after putting on 6.2 % in June. Sales were particularly dynamic for some industrial products, partially offsetting the sharp decline in turnover seen during lockdown. This was notably the case for bicycles and motorcycles (up 33.1 % year-on-year), footwear (up 20.9 %), DIY (up 19.6 %) and furniture (up 19.4 %). Conversely, perfumes and personal care products and press and stationery products, which lost 10.6 % and 7.7 % respectively, did not benefit from this trend. Overall, the extent of the catch-up remains limited for industrial goods sales as a whole, which posted year-on-year growth of 7.5 % in July after 11.1% in June. Food sales were almost stable, inching up by 0.6 %.

In terms of distribution channels, sales of small retailers grew, thanks to the lifting of lockdown, by 5.2 % year-on-year after 12.3 % in June. Sales of large general retailers increased more moderately by 1.7 %. Sales were up mainly in supermarkets, by 4.3 %, while in department stores, they remained well below pre-crisis levels, down 27.2 %. The data observed at the end of June point to a slowdown in distance selling, which nevertheless remains sharply up by 27.3 % year-on-year