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## Monthly survey on retail trade 2020Nov

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In November, turnover in retail trade fell markedly though less than in April

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

Notes: November and October 2020, y-o-y comparison; seasonally and working-day adjusted volume terms

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

trade (see methodology) retail-trade-november-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.

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.

The data for this survey was collected from December 1st to 7th and cover turnover for the month of November 2020 as a whole. The shift of the Black Friday to December has to be considered when comparing to November 2019.

In November, as "non-essential" retailers were shut until the 28th, turnover in retail trade plunged by 24.5% year-on-year (adjusted for seasonal and working-day variations) after rising by 6.2% in October. As a comparison, it had fallen by 39.1% during the first lockdown in April. In November, the change was due more to the decline in industrial goods sales, down by 37.0%, than to the decrease in food sales, which fell by 6.4%. The largest falls were in watches and jewellery (-77.1%), sports equipment (-75.0%), perfumes and personal care products (-68.8%) and textiles and clothing (-68.5%). The only two sectors to show a year-on-year increase were DIY, up 5.2%, and pharmaceuticals, up 1.0%.

In terms of distribution channels, sales of small retailers collapsed by 30.1% year-on-year and those of large general retailers were down by 8.0%. Although the decline in the activity of large general retailers was widespread, it was nevertheless heterogeneous: while department stores saw a 70.9% drop in activity, hypermarkets recorded a 14.8% decrease and supermarkets a fall of just 1.4%. The data observed at the end of October (final data at the end of November is not available yet) show a 23.3% year-on-year rise in distance selling after an increase of 20.3% in September.