7 May 2014

Shift of Easter shopping influenced food sales development

Retail trade – March 2014

In March 2014 sales in retail trade including the automotive segment after seasonal adjustment decreased by 0.4% at constant prices, month-on-month. Working days adjusted sales increased by 5.2%, year-on-year, the same as non-adjusted. Y-o-y sales growth was influenced mainly by sale in the automotive segment and by sale of non-food goods.

Seasonally adjusted sales in retail trade including sale and repair of motor vehicles decreased in March 2014 by 0.4% at constant prices, month-on-month. Both y-o-y adjusted and non-adjusted sales recorded the same growth by 5.2% (at the same number of working days in March 2014 and 2013). The automotive segment contributed to the y-o-y sales growth more than the retail trade alone (see Table 2). Sales development was partially influenced also by lower comparison base of the previous year in some of the assortment groups of stores.

**Seasonally adjusted** sales for **sale and repair of motor vehicles (CZ-NACE 45)** decreased by 1.1% **at constant prices, m-o-m**. **Year-on-year**, **working days adjusted** and **non‑adjusted sales** increased by 14.0%, while last March a drop by almost 10% was recorded. Year-on-year, non-adjusted sales for sale of motor vehicles (including spare parts) increased by 14.7% and for repairs by 11.1%.

In **retail trade including sale of automotive fuel (CZ-NACE 47) seasonally adjusted** sales decreased **at constant prices** by 0.1%, **m-o-m**, and **working days adjusted sales** increased by 1.3%, **y-o-y**, the same as **non-adjusted**. Non-adjusted sales for non-food goods increased by 7.6%, for automotive fuel they stagnated, and for food they dropped by 5.5%, y-o-y. Food sales in March were partially influenced also by a shift of Easter shopping, which was last in year in March, but this year it was in April.

Higher sales growth of retail sale via mail order houses or via Internet continued (+18.2%). Most of the main assortment groups of stores with non-food goods recorded a sales increase: retail sale of other household equipment in specialised stores (+14.1%), retail sale of cultural and recreation goods in specialised stores (+13.3%), retail sale of clothing and footwear in specialised stores (+11.7%), and retail sale of information and communication equipment in specialised stores (+10.2%). On the contrary, sales decreased in retail sale of food, beverages and tobacco in specialised stores (-8.8%), in retail sale in non‑specialised stores with food, beverages or tobacco predominating (-5.3%), in dispensing chemist in specialised stores and retail sale of medical and orthopaedic goods in specialised stores (-7.1%).

The price deflator (CZ-NACE 47) related to the corresponding period of the previous year (VAT excluded) was 100.3%. Prices increased mainly in retail sale of clothing and footwear in specialised stores, retail sale of food both in specialised and non-specialised stores, and dispensing chemist and medical and orthopaedic goods in specialised stores. On the contrary, most distinctive price falls were for information and communication equipment and other household equipment in specialised stores.

International comparison of retail sales development in the EU Member States is available at: (<http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home>).

**For the entire Q1 2014**, sales in **retail trade including the automotive segment** increased by 6.5% **at constant prices, y-o-y** (at the same number of working days in the Q1 2014 and Q1 2013); in the automotive segment it was by 17.3% and in the retail trade alone (including sale of automotive fuel) by 2.0%. Sales for non-food goods increased by 5.2% and for automotive fuel by 0.4%, while food sales dropped by 1.2%.

Notes:

*Data for March 2014 are preliminary; final data for all months of 2014 will be available in June 2015 at the latest.*

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*Method of data acquisition: direct survey of the CZSO (SP1-12)*

*End of data collection: 28 April 2014*

*End of data processing: 2 May 2014*

*Related outputs: Fixed-base and y-o-y indices since 2000 and 2001 are available in time series (*[*http://www.czso.cz/eng/redakce.nsf/i/sales\_indices\_monthly retail\_trade\_hotels\_and\_restaurants\_time\_series*](http://www.czso.cz/eng/redakce.nsf/i/sales_indices_monthly_retail_trade_hotels_and_restaurants_time_series)*).*

*Next News Release will be published on: 5 June 2014*

Annexes:

Table 1 Retail trade, sale and repair of motor vehicles and motorcycles

Table 2 Sales in main assortment types of stores (year-on-year changes, decomposition of increase – year-on-year)

Graph 1 Sales in retail trade, excl. automotive fuel (fixed-base indices)

Graph 2 Sales in retail trade (CZ-NACE 47) – international comparison