6 May 2016

Easter holidays influenced food sales development

Retail trade – March 2016

In March 2016, sales in retail trade after seasonal adjustment stagnated at constant prices, month-on-month (m-o-m). Sales adjusted for calendar effects increased by 4.3%, year‑on-year (y-o-y), non-adjusted by 5.1%. The sales development was influenced by a different number of working days in comparison to the previous year and by Easter holidays.

Seasonally adjusted sales in retail trade except of motor vehicles and motorcycles (CZ‑NACE 47) stagnated in March at constant prices, month-on-month. Sales adjusted for calendar effects increased by 4.3%, year-on-year; for sale of automotive fuel it was by 9.4%, for non-food goods by 4.7%, and for food by 3.3%. Non-adjusted sales in retail trade increased by 5.1%, y-o-y, for automotive fuel it was by 8.0%, for non-food goods by 3.0%, and for food by 6.8%. The year-on-year development of sales in retail trade was influenced by a different number of working days (by 1 working day less than in March 2015) as well as by the fact that Easter shopping was done in April last year, while this year it was in March. As for purchases related to Easter holidays (especially food), the influence of Easter prevailed over the influence of the number of working days.

The year-on-year increase of non-adjusted sales in retail trade was influenced the most by sale of food in non-specialized stores (growth by 7.0%) and by retail sale via mail order houses or via Internet (growth by 21.0%). Higher sales were recorded also by specialized stores with food (+4.6%), cultural and recreation goods (+2.4%), and other household equipment (+1.1%). On the contrary, decrease was recorded in retail sale of information and communication equipment in specialised stores (-5.9%), clothing and footwear (-2.6%), and dispensing chemist, medical and orthopaedic goods in specialised stores (-2.4%).

The price deflator (CZ-NACE 47) related to the corresponding period of the previous year (VAT excluded) was 97.4%. It was influenced mainly by lower prices of automotive fuel, information and communication equipment, and food. On the contrary, prices increased in retail sale of clothing and footwear, cultural and recreation goods, and dispensing chemist, medical and orthopaedic goods.

**Seasonally adjusted** sales **for sale and repair of motor vehicles (CZ-NACE 45)** increased **at constant prices** by 0.4%, **m-o-m**. Sales **adjusted for calendar effects** increased by 8.2%, **y-o-y**. **Non-adjusted** sales increased by 4.9%, **y-o-y**, sales for sale of motor vehicles (including spare parts) increased by 5.9% and for repair of motor vehicles by 0.4%.

International comparison of retail sales development in the EU Member States is available at: (<http://ec.europa.eu/eurostat/web/short-term-business-statistics/publications/news-releases>).

**For the entire Q1 2016, non-adjusted** sales **in retail trade except of motor vehicles and motorcycles (CZ‑NACE 47)** increased by 6.1% **at constant prices, y-o-y**; for automotive fuel it was by 7.7%, for food and non-food goods the same by 5.8%. Sales **for sale and repair of motor vehicles (CZ-NACE 45)** increased by 8.5%, sales for sale of motor vehicles (including spare parts) increased by 9.5% and for repair of motor vehicles by 4.0%.

Notes:

*Data for March 2016 are preliminary. Final data for all months of 2016 will be available in June 2017 at the latest.*

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

*End of data collection: 28 April 2016*

*End of data processing: 3 May 2016*

*Related outputs: Fixed-base and y-o-y indices since 2000 and 2001 are available in time series (https://www.czso.cz/csu/czso/sales\_indices\_monthly\_retail\_trade\_hotels\_and\_restaurants\_time\_series).*

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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