

MONTHLY FD REVIEW

BDO CHARITY RETAIL SALES TRACKER

JULY 2025

TOTAL SALES AND TOTAL SALES OF DONATED GOODS REBOUND AFTER FALLING LAST MONTH

Charity Retail Association®
The voice of charity retail

CHARITY



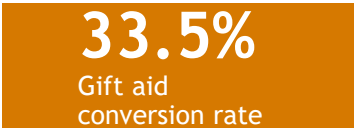
July 2024: -3.2%



July 2024: -3.8%



July 2024: +9.0%



July 2024: 31.5%

* Figure re-stated excluding extreme values.

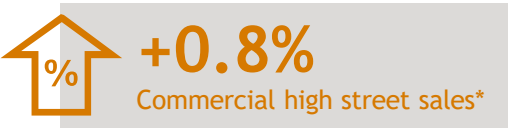
COMMENTS FROM CHARITY RETAIL

- After falling last month, Total LFL sales bounced back in July, growing by +1.6% and better than the -3.2% fall a year earlier.
- Total LFL sales of new goods saw another monthly decline, falling by -2.2% this month, and down on the +9.0% achieved this time last year.
- Total LFL sales of donated goods recovered from last month's fall, growing by +1.4%, and up on the -3.8% seen this time last year.

KEY FACTORS AFFECTING THE MONTH

- The Met Office said July began with high temperatures in the south of the UK but the weather then turned unsettled as frontal systems moved in, bringing rain to many areas. Springboard figures showed footfall on the high street averaged -3.0% in July, with a low of -14.8%.
- These figures explain why several charity retailers cited the weather and footfall as challenges this month.

COMMERCIAL



July 2024: +1.1%



July 2024: +0.6%

COMMENTS FROM COMMERCIAL RETAIL

- Total LFL sales of +1.6% achieved by charity retailers outperformed the commercial high street which saw in-store sales grow by +0.8%.
- Commercial high street in-store *lifestyle* LFL were flat at +0.0% in July, in-store *fashion* sales grew by +1.3%, and in-store *homeware* sales grew by +0.4%.
- Looking at the economy, the ONS said real GDP is estimated to have grown by +0.3% in the three months to June, compared with the three months to March 2025. CPI inflation was 3.8% in July - a 19-month high - driven by food prices and air fares. The July CPI figure makes another reduction in the cost of borrowing this year unlikely.



JOIN THE TRACKER FOR MORE DETAILED REPORTS

As part of the Charity Retail Sales Tracker (CRST), we produce more detailed weekly and monthly reports for the medium to very large retail chains that take part, allowing them to easily benchmark their performance against peers.

The more charity retailers involved, the greater the value our tracker can provide for participants and the wider sector as a whole.

To participate and receive these exclusive reports, contact:

charityretailsalestracker@bdo.co.uk

FURTHER INFORMATION:

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[1] Source: www.bdo.co.uk/high-street-sales-tracker

Any footfall figures quoted come from Springboard.