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# RETAIL TRADE, NOVEMBER 2025

In November 2025, the retail trade turnover increased in real terms at the annual level and decreased at the monthly level.

## **At the monthly level, the retail trade turnover of food and non-food products decreased**

In November 2025, the total seasonally and working-day adjusted retail trade turnover of all business entities engaged in this activity was in real terms **2.2%** lower than in October 2025. Out of that, the retail trade turnover of food products decreased by 4.3% and the retail trade turnover of non-food products (except for automotive fuels and lubricants) decreased by 3.8%.

## **Real retail trade turnover has continued to increase for the 32<sup>nd</sup> consecutive month at the annual level**

In November 2025, compared to the same month of the previous year, the total working-day adjusted retail trade turnover increased in real terms by **1.4%**. Out of that, the retail trade turnover of food, beverages and tobacco decreased by 2.6%, whereas the retail trade turnover of non-food products (except for automotive fuels and lubricants) increased by 4.1%.

In the first eleven months of 2025, the working-day adjusted retail trade turnover increased by 3.4% in real terms compared to the same period of the previous year.

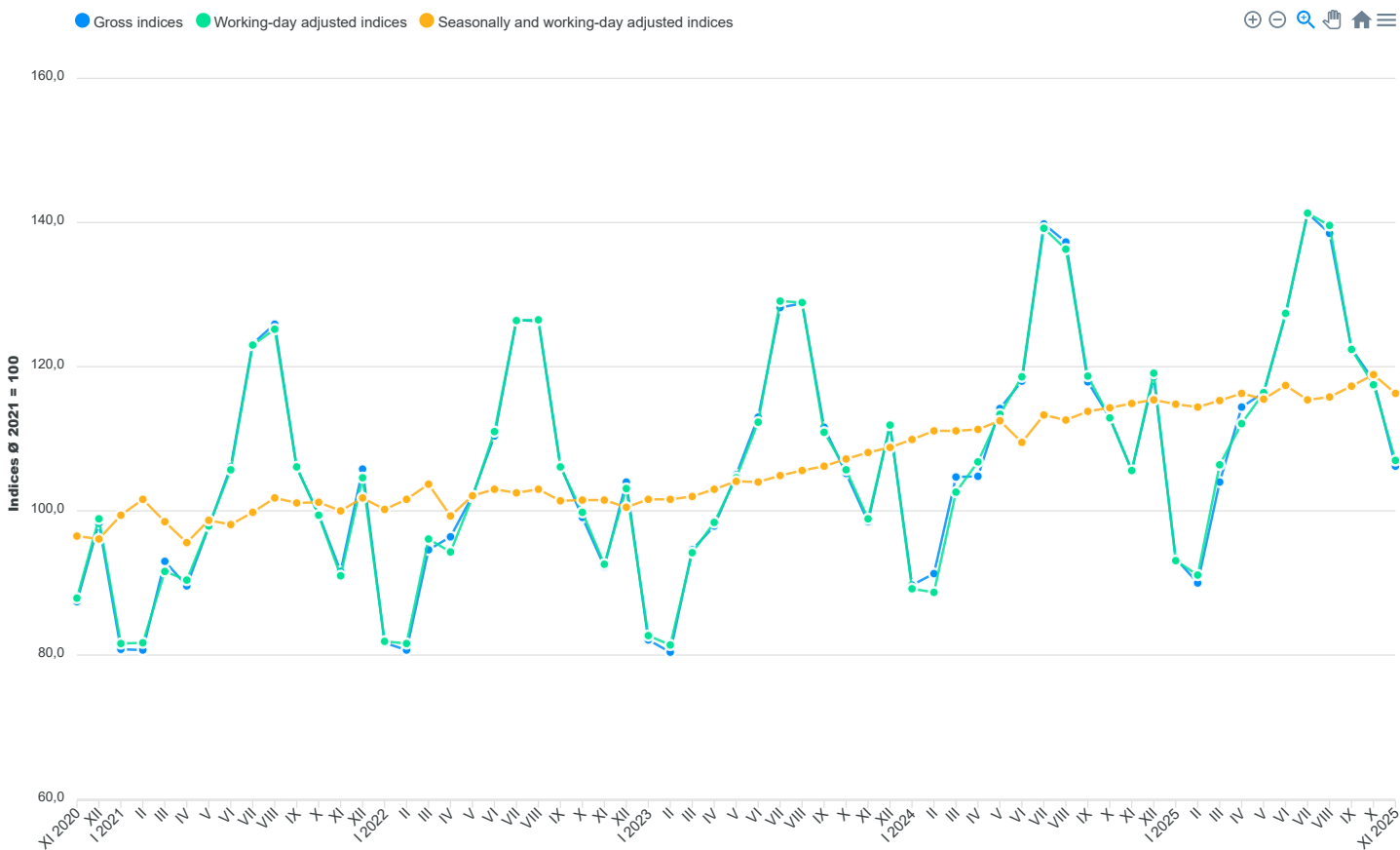
## **Retail trade of food, beverages and tobacco had the largest impact on the increase in nominal turnover**

According to gross, unadjusted indices, eight trade branches recorded an increase in turnover while turnover in one trade branch remained unchanged in November 2025, as compared to the same month of the previous year.

The largest impact on the increase in nominal turnover in November 2025 compared to the same month of the previous year, according to gross, unadjusted indices, was recorded in the following trade branches: Non-specialised stores with food, beverages and tobacco predominating, with a rise in turnover of 2.0% and an impact on the total

turnover index of 0.7%, Automotive fuels and lubricants, with a rise in turnover of 3.3% and an impact on the total turnover index of 0.6%, and Other non-specialised retail trade with non-food products, with a rise in turnover of 5.5% and an impact on the total turnover index of 0.4%. Accordingly, the total gross retail trade turnover increased in nominal terms by 3.0% compared to the same month of the previous year.

G-1 VOLUME RETAIL TRADE TURNOVER INDICES, 2020 – 2025



1 RETAIL TRADE TURNOVER – MONTH-ON-MONTH GROWTH RATES

	%					
	<u>VI 2025</u> V 2025	<u>VII 2025</u> VI 2025	<u>VIII 2025</u> VII 2025	<u>IX 2025</u> VIII 2025	<u>X 2025</u> IX 2025	<u>XI 2025</u> X 2025
Seasonally and working-day adjusted indices <sup>1)</sup>						
Value index	1,4	-0,9	0,5	1,6	1,1	-1,7
Volume index	1,7	-1,7	0,4	1,3	1,3	-2,2
Gross (unadjusted) indices						
Value index	9,2	11,2	-2,4	-10,7	-2,7	-9,9
Volume index	9,3	11,1	-2,0	-11,6	-3,5	-10,1

1) Data compared to those of the previous month are seasonally and working-day adjusted data.

2 RETAIL TRADE TURNOVER – YEAR-ON-YEAR GROWTH RATES

%

	<u>VI 2025</u> VI 2024	<u>VII 2025</u> VII 2024	<u>VIII 2025</u> VIII 2024	<u>IX 2025</u> IX 2024	<u>X 2025</u> X 2024	<u>XI 2025</u> XI 2024	<u>I – XI 2025</u> I – XI 2024
Working-day adjusted indices <sup>1)</sup>							
Value index	9,8	4,2	5,3	6,1	6,3	3,7	5,8
Volume index	7,4	1,5	2,4	3,1	4,1	1,4	3,4
Gross (unadjusted) indices							
Value index	10,1	4,0	3,7	6,9	6,8	2,8	5,3
Volume index	7,8	1,1	0,9	3,9	4,6	0,6	2,9

1) Data compared to those of the same month of the previous year are the working-day adjusted data.

3 SEASONALLY AND WORKING-DAY ADJUSTED RETAIL TRADE TURNOVER INDICES

NKD 2007 activity code		Retail trade turnover					
		Value indices			Volume indices		
		<u>IX 2025</u> VIII 2025	<u>X 2025</u> IX 2025	<u>XI 2025</u> X 2025	<u>IX 2025</u> VIII 2025	<u>X 2025</u> IX 2025	<u>XI 2025</u> X 2025
47	Retail trade, except of motor vehicles and motorcycles	101,6	101,1	98,3	101,3	101,3	97,8
47.11 + 47.2	Retail trade of food, beverages and tobacco	102,5	100,4	97,6	101,3	102,9	95,7
47.19 + 47.4 + 47.5 + 47.6 + 47.7 + 47.8 + 47.9	Retail trade of non-food products (except of automotive fuels and lubricants)	102,1	102,9	96,6	103,5	101,7	96,2
47 – 47.3	Retail trade, except of automotive fuels and lubricants in specialised stores	101,7	101,2	97,2	101,4	101,4	97,0
47.3	Retail trade of automotive fuels and lubricants	103,2	98,8	104,4	97,9	101,3	98,5
47.91	Retail sale via Internet or via mail order	109,5	104,0	101,0	113,9	102,4	101,4

## 4 WORKING-DAY ADJUSTED RETAIL TRADE TURNOVER INDICES

NKD 2007 activity code		Retail trade turnover					
		Value indices			Volume indices		
		<u>IX 2025</u> IX 2024	<u>X 2025</u> X 2024	<u>XI 2025</u> XI 2024	<u>IX 2025</u> IX 2024	<u>X 2025</u> X 2024	<u>XI 2025</u> XI 2024
47	Retail trade, except of motor vehicles and motorcycles	106,1	106,3	103,7	103,1	104,1	101,4
47.11 + 47.2	Retail trade of food, beverages and tobacco	107,4	105,8	102,8	101,9	101,6	97,4
47.19 + 47.4 + 47.5 + 47.6 + 47.7 + 47.8 + 47.9	Retail trade of non-food products (except of automotive fuels and lubricants)	105,6	107,7	104,6	105,0	107,7	104,1
47 – 47.3	Retail trade, except of automotive fuels and lubricants in specialised stores	106,6	106,8	103,5	103,2	104,2	100,9
47.3	Retail trade of automotive fuels and lubricants	104,4	104,0	103,3	107,6	109,0	106,6
47.91	Retail sale via Internet or via mail order	105,3	106,3	108,1	105,9	105,1	108,2

## 5 GROSS (UNADJUSTED) VALUE INDICES OF RETAIL TRADE TURNOVER, BY BRANCHES

Trade branches		Share in total turnover, % XI 2025	Impact on total index, % <sup>1)</sup> $\frac{XI\ 2025}{XI\ 2024}$	$\frac{XI\ 2025}{X\ 2025}$	$\frac{XI\ 2025}{XI\ 2024}$	$\frac{I - XI\ 2025}{I - XI\ 2024}$
Total		100,0	-	90,3	103,0	105,1
Total, except of motor vehicles, parts and accessories for motor vehicles, motorcycles and related parts and accessories, and automotive fuels and lubricants		78,3	-	90,0	102,7	105,9
01 + 03 + 04	Motor vehicles, parts and accessories for motor vehicles, motorcycles and related parts and accessories	4,7	0,2	96,4	104,4	100,6
30	Automotive fuels and lubricants	17,0	0,6	89,9	103,3	102,3
11	Non-specialised retail trade with food, beverages and tobacco predominating	33,4	0,7	86,6	102,0	105,4
19	Other non-specialised retail trade with non-food products	7,8	0,4	94,6	105,5	108,7
21 + 22 + 23 + 24 + 25 + 26 + 29	Specialised stores with food, beverages and tobacco	5,5	0,0	85,3	100,0	103,6
73 + 74 + 75	Dispensing chemists, medical and orthopaedic goods, optical products, cosmetic and toilet articles	8,9	0,4	88,2	104,6	108,2
51 + 71 + 72	Textile, clothing, footwear and leather goods	8,1	0,2	95,1	101,9	104,2
43 + 52 + 54 + 59 + 63	Audio and video equipment, hardware, paints and glass, electrical household appliances, furniture and other household articles	9,1	0,2	100,3	101,7	104,3
41 + 42 + 53 + 61 + 62 + 64 + 65 + 76 + 77 + 78 + 79	Computer equipment, books and newspapers, games and toys, flowers and seeds, watches and jewellery and other specialised products	5,5	0,3	90,8	104,9	107,8

1) Impact on the total index is a product of the multiplication of a trade branch's share in the total turnover and the rate of growth or fall in turnover in a month of the current year in relation to the same month of the previous year divided by 100.

## NOTES ON METHODOLOGY

### Notice

Since January 2024, the base year has been changed to 2021, and the new observation unit is a kind-of-activity unit (KAU).

The new base year and the new observation unit – kind-of-activity unit (KAU), are defined by Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics, which concerns short-term business statistics of all Member States.

Data at the level of the new observation unit are available from January 2005 and onwards, while for the period from 2000 to 2004 they are published at the enterprise level.

Time series on retail trade turnover starting with 2000, published with the base year 2021 = 100, are available in Excel tables on the website of the Croatian Bureau of Statistics within **Databases** under the titles [STS Databases](#) and [PC-Axis Databases](#), and within **Statistics in Line** under the title [Economy – Basic Indicators](#). The tables in databases published with the old base year (2015 = 100) will no longer be updated.

Precise dissemination dates are listed in the Calendar of Statistical Data Issues, which is available on the website of the Croatian Bureau of Statistics <https://podaci.dzs.hr/en>.

### **Sources and methods of data collection**

The data are based on the Monthly Report on Retail Trade (TRG-1 form) and administrative data sources (Tax Administration fiscalisation file).

The data are collected via a web-based application (the so-called CAWI). The reporting units enter data directly into the TRG-1 e-form, which is available on the Data Dissemination and Collection Portal of the Croatian Bureau of Statistics at <https://podaci.dzs.hr/hr/obrasci/trgovina-i-ostale-usluge/>. The period for data collection ranges each month, as a rule, between the 1<sup>st</sup> and the 20<sup>th</sup> day in a month for the previous reference month data.

The methodology for this survey is based on Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics, and the Commission Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics.

This survey is conducted on the basis of the Official Statistics Act (NN, Nos 25/20, 155/23 and 124/25 – corr.).

The Decision on the National Classification of Activities, 2007 version – NKD 2007, will be applied in the Survey until 31 December 2027 in line with the transitional provision from Article 6 of the Decision on the National Classification of Activities, 2025 version – NKD 2025 (NN, No. 47/24): "For statistical and analytical purposes of official statistics of the Republic of Croatia, in the transitional period until 31 December 2027, the Decision on the National Classification of Activities, 2007 version – NKD 2007 (NN, Nos 58/07 and 72/07 – correction) shall be concurrently applied" and Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics.

### **Coverage and comparability**

The statistical unit of the retail trade turnover index is a kind-of-activity unit. The observation units are business entities (legal entities and tradesmen) registered in retail trade as their main activity (division 47 of the NKD 2007) as well as selected business entities registered in other activities if performing retail trade activities. The most significant multi-industry enterprises have been divided into so-called kind-of-activity units to improve the homogeneity of the results of statistical surveys by activity, and thus the international comparability of these results.

The survey is carried out using the sampling method. The sample frame consists of business entities and parts thereof registered in the Statistical Business Register of the Croatian Bureau of Statistics. Since 2021, the sample selection frame has been expanded using an administrative data source (Tax Administration fiscalisation file).

Business entities are divided by their main activity on the basis of the NKD 2007 (NN, Nos 58/07 and 123/08). By size, they are divided into classes from 1 to 7.

The criterion for determining the size of a business entity is the number of persons in employment. Business entities of size 1 are those employing 0 – 4 persons, of size 2 those employing 5 – 9 persons, of size 3 those employing 10 – 19 persons, of size 4 those employing 20 – 49 persons, of size 5 those employing 50 – 99 persons, of size 6 those employing 100 – 249 persons and of size 7 those employing 250 and more persons. For business entities engaged primarily in non-trade activities, the number of persons in employment in trade activities is taken into account.

The method used to select the sample is the cut-off method. The sample covers all business entities employing 10 and more persons as well as business entities selected by using the cut-off method employing less than 10 persons and covering 70% of the total turnover in each class of division 47 of the NKD 2007. Due to the

application of the cut-off method for selecting the sample, the standard error and the coefficient of variation are not calculated.

### **Seasonal and working-day adjustment method**

Since 2016, in the process of seasonal adjustment the software package JDemetra+ and X13 ARIMA method have been used. This process identifies and assesses seasonal and working-day effects in time series by using statistical models and procedures.

The revision of the previously published seasonally and working-day adjusted indices is due to several causes. The most common cause is the change in estimated parameters of existing statistical models while conducting new estimates, which occurs due to new observations. Other causes are changes in source data or in applied statistical models.

Calendar effects have a significant impact on time series movement, the most common of which are the effect of moving holidays, the effect of the leap year and the effect of working days.

### **Notice concerning the terminology**

In the Croatian language, the term "kalendarsko prilagođavanje" (calendar adjustment) is not the literal translation of the term "working-day adjustment" in English, which means "adjustment for the number of working days". It is used in order to prevent misunderstandings by national users.

The term "working-day adjustment" in short-term business statistics actually refers to calendar adjustment, but due to specific Eurostat's terminological requirements for short-term business statistics, the term "working-day adjustment" is used instead.

### **Seasonally and working-day adjusted indices**

The seasonally and working-day adjusted indices imply that the gross indices are adjusted for seasonal and calendar effects. Indices adjusted in that way and associated rates of change in two consecutive observations are used to compare data with data from the previous month.

In line with the above mentioned, month-on-month growth rates of turnover calculated on the basis of seasonally and working-day adjusted indices are presented and interpreted (the comparison between the indices of the current reporting month with the indices of the previous reporting month) in the monthly comparison (First Release, Tables 1 and 3).

### **Working-day adjusted indices**

Working-day adjusted indices imply that the gross indices are adjusted only for calendar effects. Indices adjusted in that way and associated inter-annual rates of change are used to compare data with data from the same month of the previous year.

In line with the above mentioned, year-on-year growth rates of the volume of turnover calculated on the basis of working-day adjusted indices are presented and interpreted (comparison between indices of the reporting month with the indices of the same reporting month of the previous year) in the annual comparison (First Release, Tables 2 and 4).

### **Trend indices**

Time series of trend indices are released with each revision of seasonally adjusted data in Excel tables on the website of the Croatian Bureau of Statistics within the **Databases** under the titles [STS Databases](#) and [PC-Axis Databases](#), and within **Statistics in Line** under the title [Economy – Basic Indicators](#).

### **Gross indices**

In order to sustain the consistency and continuity with the previously released data, indices continue to be presented as gross, unadjusted indices in the same way as before (First Release, Tables 1, 2 and 5).

Data are regularly sent to Eurostat every month (in the form of value and volume gross, seasonally and working-day adjusted indices on the basis of 2021). They are available on [Eurostat's website](#) together with the indicators of other EU Member States they are comparable with.

Definitions

**Turnover** is the total value of all goods sold and services provided on the market in a month, irrespective of whether paid up or not. It also includes the value added tax.

**Retail trade turnover** is a turnover generated by all business entities engaged in this activity, irrespective of their registered main activity.

The results are published in the form of nominal (value indices) and real indices (volume indices).

Value indices show the turnover movements in current prices.

Volume indices are calculated by deflating the value indices by the retail trade price index of goods (without electricity and water distribution) according to the consumer price index.

Retail trade branches

Retail trade branches represent the actual predominant assortment of sales in the retail trade. Since January 2024, the main criterion for monitoring the turnover by trade branches has been based on what is sold, not on sales channels, and turnover indices for the following trade branches are no longer published: Retail sale via Internet or via mail order and Other non-store retail sale.

Abbreviations

CAWI	computer-assisted web interview
EU	European Union
Eurostat	Statistical Office of the European Union
NKD 2007	National Classification of Activities, 2007 version
NKD 2025	National Classification of Activities, 2025 version
NN	Narodne novine, official gazette of the Republic of Croatia

Symbols

-	no occurrence
0,0	value not zero but less than 0.05 of the unit of measure used



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