SHOPPING CENTRE
COUNCIL OF AUSTRALIA

RESEARCH NOTE

RETAIL TRADE ESTIMATE* INCREASED BY 2.7 PER CENT IN JUNE 2020 AND BY 8.5 PER CENT YEAR-ON-YEAR

Tuesday, August 4 2020 - The latest release (June 2020) of the monthly ABS Retail Trade data indicates that the overall month-on-month (m-o-m) estimate* increased by 2.7 per cent, down from (a record) 16.9 per cent in May 2020. Retail Turnover increased by 8.5 per cent year-on-year (y-o-y), up from 5.8 per cent in the prior corresponding period (pcp). Following a significant pick-up in spending in May 2020, the latest figures highlight the further impacts of stores re-opening as restrictions continued to ease throughout June. * The ABS has temporarily suspended the publication trend data due to volatility.

STATE OF PLAY

The adjacent table summarises the key data in **seasonally adjusted** terms across the six ABS retail categories. The strongest growth was recorded for ‘Cafes, restaurants and takeaway food services’ retailing on a m-o-m basis (27.9 per cent), whilst ‘Household goods’ retailing recorded the strongest growth on a y-o-y basis (24.5 per cent). In **seasonally adjusted** terms, Retail Turnover increased by 2.7 per cent in the month of June, down from (a record) 16.9 per cent in May 2020. On a y-o-y basis, Retail Turnover increased by 8.5 per cent, up from 5.8 per cent in the pcp.

CATEGORIES	$ billion	m-o-m	last 3 months	y-o-y
Food retailing	$12.80	↑ 0.9%	↓ -10.6%	↑ 14.0%
Household goods retailing	$5.71	↓ -3.2%	↑ 12.7%	↑ 24.5%
Clothing, footwear and personal accessory retailing	$2.08	↑ 20.5%	↑ 28.1%	↓ -4.2%
Department stores	$1.56	↓ -12.1%	↑ 8.1%	↑ 0.2%
Other retailing	$4.35	↑ 0.3%	↓ -6.0%	↑ 9.6%
Cafes, restaurants and takeaway food services	$3.26	↑ 27.9%	↑ 7.7%	↓ -16.6%
Retail Turnover	**$29.76**	**↑ 2.7%**	**↓ -1.2%**	**↑ 8.5%**

Source: ABS (Cat 8501.0) / SCCA Research *Seasonally Adjusted

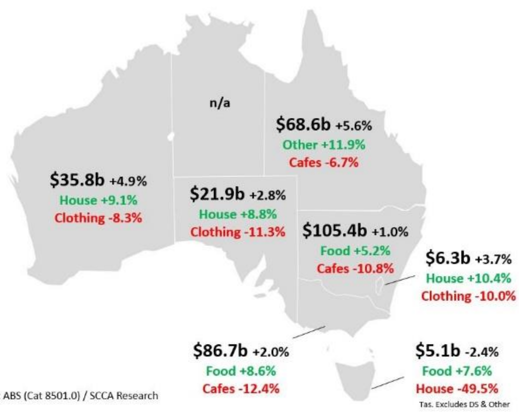
TREND ANALYSIS: CHAIN VOLUME MEASURES

The quarterly chain volume measure estimates the change in value after the direct effects of price changes have been eliminated, reflecting changes in volume. In the quarter to June 2020, Chain Volume Measures decreased by 3.4 per cent, down from 0.7 per cent in the pcp. Retail Turnover decreased by 1.2 per cent in the June 2020 quarter, significantly down from 8.7 per cent in the pcp.

Source: ABS / SCCA Research

STATE BY STATE: BEST AND WORST

Retail turnover varies within the ABS defined six categories and across different jurisdictions. The adjacent map outlines and compares the total and growth of retail trade (y-o-y), and the best and worst retail growth categories. The strongest jurisdictions in **seasonally adjusted** terms were Queensland (up 5.6 per cent to $68.6 billion) followed by Western Australia (up 4.9 per cent to $35.8 billion) and the ACT (up 3.7 per cent to $6.3 billion). Tasmania (down 2.4 per cent to $5.1 billion) was the worst performing jurisdiction and for the fourth month running recorded negative growth, followed by New South Wales (up 1.0 per cent to $105.4 billion). ‘Food’ retailing was still the strongest performing category across three jurisdictions, whilst discretionary spending categories were the worst performing across most of the country, most notably ‘Clothing, footwear & personal accessory’ and ‘Cafes, Restaurants & Takeaway Food’ retailing.



Source: ABS (Cat 8501.0) / SCCA Research

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