

April U.S. Retail Sales

Overview

- 1 April retail sales cooled after a strong March but remained positive, growing 0.5%.
- 2 Electronics, sporting goods and nonstore retail led gains while furniture, clothing and department stores declined.
- 3 Despite 3.8% inflation, driven by rising energy prices, and weakening consumer sentiment, overall spending held up, though lower-income households are turning to credit to cover essentials.

Breaking Down U.S. Retail Sales

April retail sales growth cooled to 0.5% following the significant 1.6% gain in March. Excluding auto and gasoline categories, sales still grew 0.5% as consumers continued to spend despite sharply higher gas prices since the Iran war. The gains were led by electronics and sporting goods, hobby, musical instruments and book stores, each growing 1.4%. Nonstore retail grew 1.1%. The only negative categories were furniture, clothing and department stores, down 2%, 1.5% and 3.2% in the month, respectively.

On a YOY basis, April retail sales advanced 4.9% and were up 4.7% for the four-month YTD period, both excluding auto and gas. Sporting goods, nonstore and miscellaneous store retailers were the strongest performers in both periods, while furniture and department stores remained the only categories in the red. It bears noting that retail sales data are not adjusted for inflation. April CPI rose 0.6% for the month and 3.8% YOY (the highest rate since May 2023), driven by higher energy prices, which jumped 18% over the prior year. Gasoline prices rose 28% and fuel oil spiked 54% YOY, reflecting the ongoing disruption to global oil supplies from the Iran war. Against that backdrop, the resilience in consumer spending is notable, though the picture is increasingly uneven. Lower and middle-income households are showing signs of strain, turning to credit to cover everyday essentials as inflation erodes their purchasing power faster than wages can keep up.

The resilience in consumer spending is also notable given the sharply deteriorating mood among consumers, with sentiment surveys trending toward multi-year lows.

For questions or analytical support, please call:

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Seasonally Adjusted Retail Sales

Source: U.S. Census, Bloomberg

	Apr 2026	Apr 2026 (Est. **)	Mar 2026	Apr 2026
	m/o/m	m/o/m	m/o/m	y/o/y
Total Retail Sales	0.5%	0.5%	1.6%	4.9%
Retail Sales Ex Auto	0.7%	0.7%	1.9%	6.3%
Retail Sales Ex Auto and Gas	0.5%	N/A	0.7%	4.9%
Core Retail Sales*	0.5%	0.4%	0.8%	5.7%
By Category:				
Furniture & home furnishings	-2.0%		2.6%	-3.6%
Electronics & appliance	1.4%		1.3%	7.6%
Building materials & garden	0.1%		1.1%	2.2%
Food & beverage stores	0.8%		1.0%	1.4%
Grocery	0.7%		1.1%	1.5%
Health & personal care	0.0%		1.1%	2.3%
Gasoline stations	2.8%		13.7%	20.9%
Clothing & clothing accessories	-1.5%		0.5%	5.5%
Sporting goods, hobby, musical instrument & book stores	1.4%		0.2%	13.4%
General merchandise	0.1%		1.1%	3.1%
Department stores	-3.2%		4.9%	-1.2%
Nonstore retailers	1.1%		0.8%	11.1%
Food services & drinking places	0.6%		0.1%	2.7%
Miscellaneous store retailers	0.3%		-1.4%	12.8%

* Excludes sales from auto & motor vehicle dealers, gasoline stations, building materials, food services & drinking places

** Represents Bloomberg monthly sales estimates

Quarterly E-commerce Sales

Quarterly U.S. Retail Sales; Total and E-commerce

Source: U.S. Census

Quarter	Retail Sales (\$ millions)		E-commerce	% Change from Same Quarter a Year Ago	
	Total	E-comm	% of Total	Total	E-comm
4Q25	1,900,496	316,130	16.6%	2.7%	5.3%
3Q25	1,893,291	310,817	16.4%	4.1%	5.3%
2Q25	1,865,704	304,464	16.3%	3.9%	5.4%
1Q25	1,856,815	299,909	16.2%	4.4%	6.0%
4Q24	1,850,829	300,329	16.2%	3.8%	8.5%

*Retail sales excluding foodservice

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