

2Q25 Retail Sales: Strong Growth Despite Cautious Executive Outlook

By Russ Dieringer // August 19, 2025 // Forecasts, Research

TL;DR: Retail sales grew +3.9% Y/Y in 2Q25, fueled by digital channel sales growth of +5.3% Y/Y and brick & mortar (B&M) sales growth of +3.6% Y/Y. Both physical and digital channels decelerated compared to growth rates in 1Q24, although year-to-date performance of +4.2% Y/Y has trended ahead of downbeat expectations following the announcement of new tariffs in April. Despite positive sales results, brands tell us they are maintaining a cautious view for 2H25 and 2026 as they expect future price increases to weigh on the consumer and/or mercutorial trade policy to hurt their ability to plan and invest.

2 minute read

The U.S. Census Bureau released its 2Q25 eCommerce sales report, which we use as an important input into our own market-wide and company-level forecasts.

The following key data points, takeaways, and shareable one-page summary quantify and contextualize 2Q25 growth trends for eCommerce and B&M channels in the U.S. We also provide our updated retail forecasts for 2025 and 2026.

It's designed to give retail leaders a concise snapshot of current growth trends and a deeper understanding of what's driving them, as well as how the retail landscape is likely to evolve in 2025 and 2026.

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