



NEW  
UPDATE

September

# Retail Industry

Highlights 2025



You Can't Miss

**TESCO**

next

**TARGET**

TOPSHOP

DEBENHAMS

  
**Morrisons**  
Since 1899

**IKEA**

 **STARBUCKS™**

**POTTERY  
BARN**

PRIMARK®

bodycare

**amazon**



Tesco's sales rose 7.7% over 12 weeks, boosting its market share to 28.4% in the UK. Fresh food and value ranges helped it outperform rivals.

- **Sales Growth:** +7.7% in 12 weeks.
- **Outlook Watch:** Full-year guidance expected to be raised.
- **Consumer Signal:** Value-led loyalty still wins in groceries.





# next

Next flagged softer demand ahead, despite multiple profit upgrades earlier this year. Management sees inflation-driven caution weighing on fashion and homeware.

- **Sales Trend:** *Growth expected to ease in autumn.*
- **Outlook Watch:** *Omnichannel strength offers partial resilience.*
- **Consumer Signal:** *Middle-income shoppers cutting back.*





# UK RETAIL SALES

Retail volumes rose 0.5% in August, helped by warm weather and stronger non-food spending.

Despite the uptick, spending remains below pre-pandemic levels.

- **Sales Data:** +0.5% August growth.
- **Outlook Watch:** Gains may be short-lived as costs bite.
- **Consumer Signal:** Fragile recovery tied to household budgets.





TOPSHOP

TOPSHOP

TOPMAN

# TOPSHOP

Topshop is set for a comeback with 32 John Lewis shop-in-shops launching from February 2026.

The revival aims to tap nostalgia while expanding reach.

- **Store Rollout:** 32 Topshop, 6 Topman concessions.
- **Outlook Watch:** Can nostalgia drive new sales momentum?
- **Consumer Signal:** Legacy brands still carry pull with UK shoppers.





# DEBENHAMS

Debenhams announced plans to launch its British fashion labels in U.S. department stores like Macy's and Nordstrom.

The move marks a reinvention strategy after its UK high street exit.

- **Expansion Play:** U.S. retail partnerships underway.
- **Outlook Watch:** Global repositioning could revive growth.
- **Consumer Signal:** Heritage brands seek fresh markets abroad.





Primark reported a ~2% decline in like-for-like sales in H2, with UK steady, Europe weaker, and U.S. growth solid.

Regional performance highlights uneven consumer sentiment.

- **Sales Shift:** -2% like-for-like in H2.
- **Outlook Watch:** U.S. expansion remains a bright spot.
- **Consumer Signal:** Value model still resonates in select markets.





Morrisons posted just 1.4% sales growth over 12 weeks, holding share at 8.4%. Tesco, Aldi, and others outpaced performance with sharper value offerings.

- **Sales Growth:** +1.4% in latest period.
- **Outlook Watch:** Risks further share erosion without bold moves.
- **Consumer Signal:** Value and price clarity drive loyalty.



POTTERY BARN



# POTTERY BARN



Pottery Barn entered the UK with a new e-commerce site and London pop-up.

The U.S. homeware giant targets premium lifestyle shoppers in Europe.

- **Market Entry:** UK launch in Sept 2025.
- **Outlook Watch:** Competing against Ikea and John Lewis.
- **Consumer Signal:** Appetite for premium homeware remains.



A photograph of a Bodycare store interior. The store has a modern design with a black and white checkered ceiling and bright lighting. Shelves are stocked with various beauty products. A large green graphic of the letter 'K' is visible on the right side of the store. The word 'bodycare' is written in a cursive font on a white background in the foreground.

*bodycare*

Bodycare confirmed closure of all 56 stores, impacting 400+ staff, after failing to find a buyer.

The chain's decline reflects the squeeze on mid-market retailers.

- **Store Closures:** 56 sites shut permanently.
- **Outlook Watch:** Mid-tier beauty retail under pressure.
- **Consumer Signal:** Survival hinges on digital and value edge.





Amazon agreed to a \$2.5B settlement with the FTC over advertising and data practices. The penalty marks the largest civil fine in U.S. consumer protection history.

- **Regulatory Hit:** \$2.5B settlement.
- **Outlook Watch:** Stricter compliance now top priority.
- **Consumer Signal:** Trust and transparency becoming retail currency.



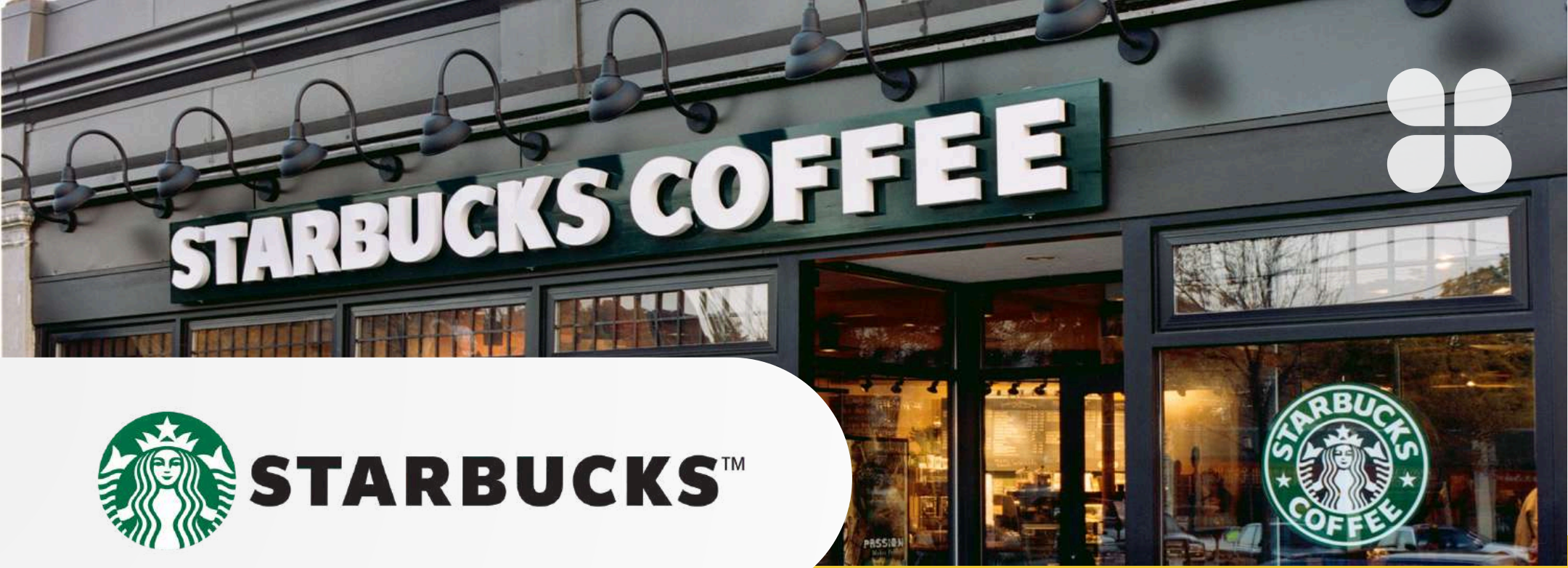


Target announced its biggest-ever Circle Week, adding 20k holiday items and wider next-day delivery.

The push aims to capture deal-hungry households ahead of Q4.

- **Holiday Prep:** 20k new items, wider delivery reach.
- **Outlook Watch:** Promotions set to intensify in peak season.
- **Consumer Signal:** Families prioritize price + convenience.



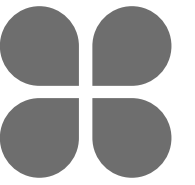


Starbucks began deploying AI-powered inventory systems across 11,000+ North American stores.

The rollout targets faster stock counts and reduced labor costs.

- **AI Adoption:** 11k+ stores onboarded.
- **Outlook Watch:** Tech-driven efficiency set to scale.
- **Consumer Signal:** AI shifts from pilot to frontline retail.





IKEA appointed a new CEO in September, pledging to sharpen affordability as a core strategy.

The leadership change comes as shoppers worldwide tighten budgets.

- **Leadership Shift:** New CEO at Inter IKEA.
- **Outlook Watch:** Focus on price leadership and efficiency.
- **Consumer Signal:** Value remains king in home furnishings.





# Experiential Retail

Manhattan saw a wave of experiential retail launches, including Pop Mart's Times Square flagship.

Brands are betting on stores as destinations for engagement and entertainment.

- **Store Trend:** *Experiential formats gaining ground.*
- **Outlook Watch:** *Physical retail evolving beyond transactions.*
- **Consumer Signal:** *Shoppers seek experiences, not just products*





# YALLO GROUP

A one-stop shop for all your  
Tech Talent needs

**CEO Fast Pass: 30 Min Call**



[in](#) / **SumeetGoenka**

CEO, Chief Technology Strategist - YALLO GROUP

yallo.co





Strategy  
and Talent Unified


# WHAT DO YOU THINK ABOUT THIS POST?

We hope this helps! Comment below to let us know what else you like to learn.

**Follow @yallogroup  
to get updated**



 [contact@yallo.co](mailto:contact@yallo.co)

 [yallo.co](http://yallo.co)