SOCR ČR
Svaz obchodu a cestovního ruchu ČR

60.8

SOCR RETAIL INDEX SUMMER 2026

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SOCR RETAIL INDEX

SENTIMENT SURVEY OF CZECH TRADE
SUMMER 2026

CZECH TRADE AND TOURISM ASSOCIATION

KEY FINDINGS

- **The overall SOCR Retail Sentiment Index for the trade sector reached 60.8 points in summer 2026.** The tenth round of the regular quarterly survey of major retailers in the Czech Republic shows a slight increase in sentiment compared with the previous quarter (+2.8 points), which partly offsets the significant decline from the previous period. The food segment rose to 58.9 points (+2.2), whilst the non-food segment strengthened more significantly to 62.7 points (+3.4). The gap between the two segments thus widened further in favour of non-food segment.
- **The assessment of the economic situation rose slightly to 61.9 points (+0.8), representing a modest improvement following a sharp decline in the previous quarter.** However, the trend was not uniform across the market. Whilst the non-food segment assessed the economic situation more positively, with its rating rising to 66.7 points (+2.8), the food segment saw a further decline to 57.1 points (−1.2). Food retailers remain cautious, particularly in their outlook for the coming quarter, highlighting the continuing deflation in food prices. Concerns are also being raised by the ongoing debate over price regulation and a ban on discounts in the food sector. Representatives from both segments also point to rising energy prices and wage pressures.
- **The assessment of sales performance rose to 63.1 points (+4.5), representing the most significant improvement of all the sectors monitored.** However, this growth was driven primarily by the non-food segment, which strengthened significantly to 70.8 points (+12.5), whilst the food segment, by contrast, weakened to 55.4 points (−3.5). Food retailers view the results for the last quarter particularly negatively, whilst retailers in the non-food segment assess the past period much more favourably and expect sales growth to continue. The food segment remains cautious in its expectations, partly due to the rapidly intensifying battle for customers, which is driving up the proportion of discount promotions and consequently leading to lower profitability.
- **The assessment of supplier relations rose to 44.0 points (+2.4) nevertheless, this area remains the lowest-rated of all the topics monitored.** Despite a slight improvement, this represents more of a partial correction of the long-term weak assessment of supplier relations than a fundamental change in trend.
- **The area of investment maintained a high rating, reaching 78.2 points (+0.8).** The stability and positive sentiment in this category confirm the retail sector's intention to continue investing in the modernisation of operations and the improvement of the customer experience, regardless of short-term fluctuations in turnover or the current economic situation.
- **Retailers identified economic conditions and changes in consumer behaviour as the main external factors affecting business (both at 50.0%).** The significance of economic conditions declined sharply compared with the previous quarter, whilst the assessment of changes in consumer behaviour remained at roughly the same level. These were followed by

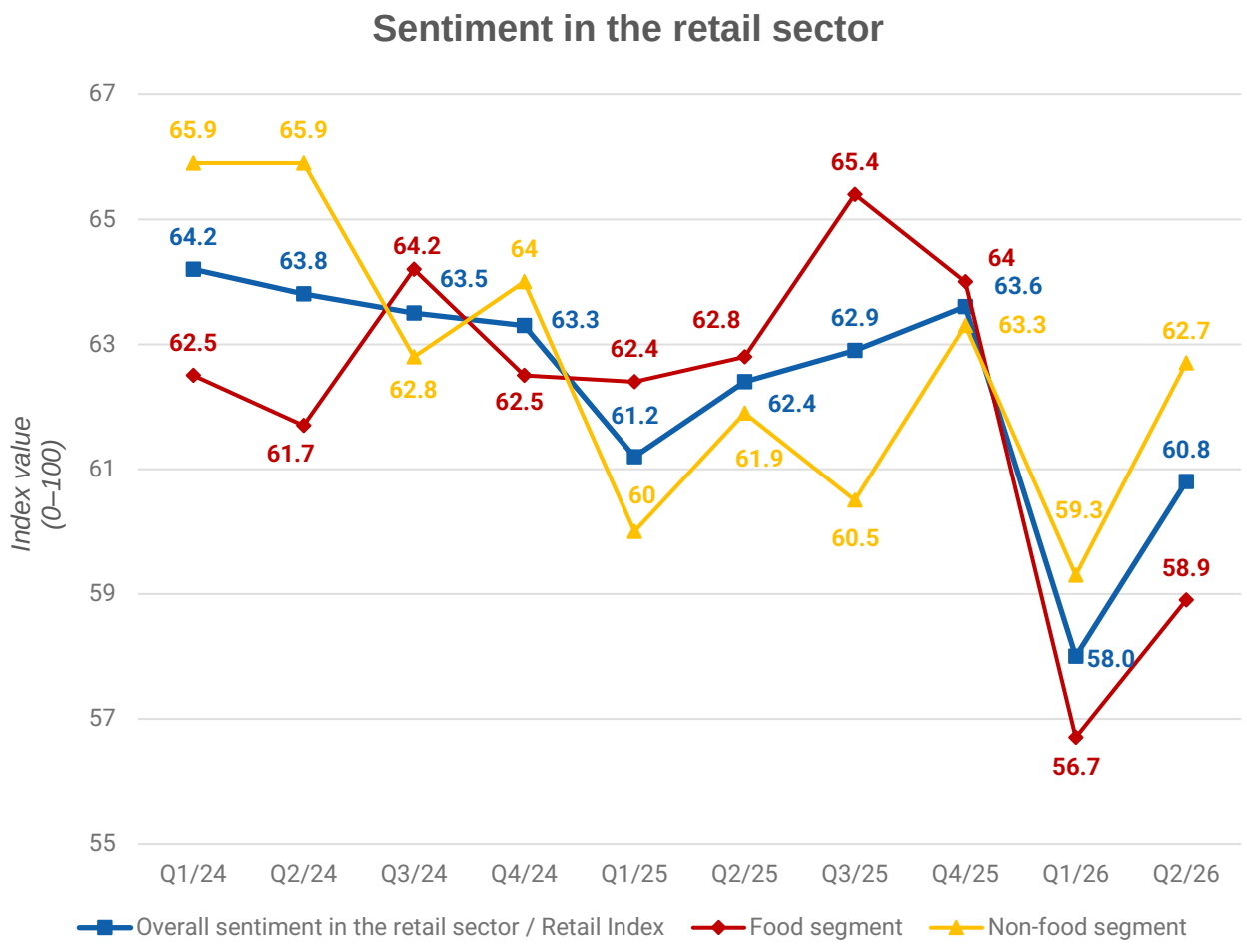
changes in the regulatory environment (43.8 %), competition and the political situation (both 37.5 %), natural disasters or unforeseen events (18.8 %), and technological developments alongside the availability of raw materials or goods (both 12.5 %). In their comments, retailers most frequently cited ongoing deflation in food prices, rising energy and labour costs, increasing competitive pressure, a growing administrative burden associated with new regulations, and persistent uncertainty arising from international geopolitical developments.

SOCR RETAIL INDEX (SUMMER 2026)

Based on a survey conducted among key retailers in the Czech Republic, we have compiled the comprehensive SOCR Retail Index for summer 2026, which provides an overall picture of the current mood and expectations within the retail sector. The summary index reached **60.8 points** this summer, representing an **increase of 2.8 points** compared with the previous quarter.

Following a fall to its lowest level over the entire period monitored, the index is gradually approaching the levels recorded at the end of 2025. This trend signals improving sentiment within the sector, as retailers expect demand to grow in the coming quarter. However, they continue to face mounting pressure on margins and uncertainty surrounding future geopolitical and regulatory developments.

The gap between the two segments widened over the summer. **The food segment** rose to 58.9 points (+2.2), whilst **the non-food segment** strengthened to 62.7 points (+3.4). The non-food segment has therefore outperformed the food segment for the second consecutive quarter, and the gap between them continues to widen.



COMPONENTS OF THE INDEX

The movements in the individual components of the composite index are particularly significant. In this chapter, you will find a detailed overview of the results by individual thematic areas, including a comparison with changes from the previous period (shown in brackets). The commentary below the table also includes the values of the sub-indices (or the results of individual questions in the questionnaire survey), which reflect not only the assessment of the past period (last quarter) but also expectations for the future (next quarter/year) in individual thematic areas.

	WHOLE INDUSTRY	Food goods	Non-food goods
Overall SOCR Retail Index	**60.8 (+2.8 p.)**	58.9 (+2.2 p.)	62.7 (+3.4 p.)
Sub-components of the SOCR Retail Index			
Economy	**61.9 (+0.8 p.)**	57.1 (-1.2 p.)	66.7 (+2.8 p.)
Sales	**63.1 (+4.5 p.)**	55.4 (-3.5 p.)	70.8 (+12.5 p.)
Employment	**52.8 (+4.2 p.)**	50.0 (0 p.)	55.6 (+8.4 p.)
Suppliers	**44.0 (+2.4 p.)**	46.4 (+3.5 p.)	41.7 (+1.4 p.)
Customers	**65.0 (+4.3 p.)**	66.1 (+7.2 p.)	63.9 (+1.4 p.)
Investment	**78.2 (+0.8 p.)**	78.6 (+7.2 p.)	77.8 (-5.5 p.)

ECONOMY (61.9): The assessment of the economic situation in the retail sector rose to **61.9** points over the summer, representing an increase of 0.8 points. However, developments in this area varied across segments: the non-food segment strengthened to **66.7** points (+2.8), whilst the food segment weakened slightly to **57.1** points (-1.2). The assessment of the past quarter remains more favourable in the non-food segment (75 points), whilst in the food segment it remained at the same level as in winter (64.3 points). The food segment rates its outlook for the next quarter at 46.4 points, which is the lowest figure recorded since measurements began. Retailers also point to continuing deflation in food prices.

SALES (63.1): The average assessment of the sales trends rose to **63.1** points in the summer, representing an increase of 4.5 points. However, this growth was driven solely by optimism in the non-food segment, which strengthened significantly to **70.8** points (+12.5), whilst the food segment, by contrast, weakened to **55.4** points (-3.5) – the lowest reading since monitoring began. The weak assessment of sales in the food segment over the last quarter thus corresponds to a cautious assessment of the overall economic situation. The segment does not expect any significant improvement in sales in the coming quarter either. Competition for customers in the food segment

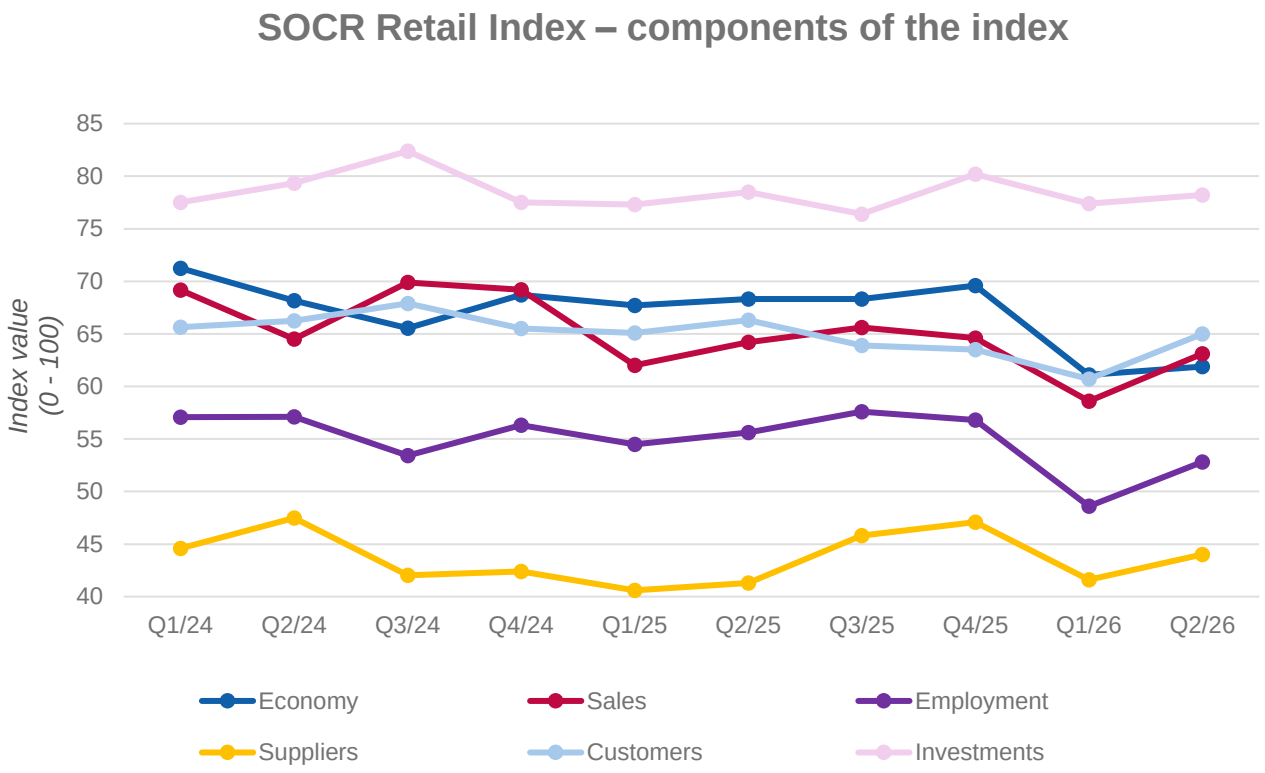
continues to intensify, requiring retailers to allocate increasing amounts of funding to discount promotions and other forms of marketing. The difference in sales sentiment between the two segments therefore remains one of the most pronounced within the entire index.

EMPLOYMENT (52.8): The employment index rose to **52.8** points over the summer, representing an increase of 4.2 points. This growth was driven primarily by the non-food segment, where the index rose to **55.6** points (+8.4), indicating a slightly more optimistic outlook. By contrast, the food segment remained unchanged at **50.0** points. Retailers in both segments do not plan any significant staffing changes in the near future. Instead, they are seeking to make better use of information systems and incorporate artificial intelligence tools to help process routine procedures and tasks more efficiently.

SUPPLIERS (44.0): The supplier relations sub-index rose to **44.0** points over the summer, representing an increase of 2.4 points. Nevertheless, this area remains the lowest-rated of all those monitored. A slight improvement was evident in both segments, though it was somewhat more pronounced in the food segment, where the rating rose to **46.4** points (+3.5). In the non-food segment, the rating increased to **41.7** points (+1.4). Despite the overall improvement, this represents only a partial correction of long-term weak results.

CUSTOMERS (65.0): The assessment of customer behaviour rating rose to **65.0** points over the summer, representing an increase of 4.3 points and ranking among the most significant improvements this quarter. This growth was driven primarily by the food segment, which rose to **66.1** points (+7.2), whilst the non-food segment saw a more modest increase to **63.9** points (+1.4). The proportion of customers using loyalty programmes continues to grow, as does the customer satisfaction rating. Customer satisfaction ratings rose particularly in the food segment, to 64.3 points (+10.7), which is mainly due to a broader range of products being included in promotional offers, meaning that customers are shopping at better prices than in the past and are therefore generally more satisfied.

INVESTMENT (78.2): The investment category reached **78.2** points in the summer and remains the highest-rated category among all monitored areas, although this represents only a slight increase of 0.8 points compared with the previous quarter. Trends varied across segments: the food segment strengthened significantly to **78.6** points (+7.2), whilst the non-food segment weakened to **77.8** points (-5.5). Although the segments switched positions, both figures remain well above the levels recorded in the other monitored areas, confirming retailers' long-standing confidence in the development and modernisation of their operations, regardless of current fluctuations in other parts of the index.



EXTERNAL FACTORS AND MAIN CHALLENGES FOR THE NEXT QUARTER

This summer, retailers identified **economic conditions** and **changes in consumer behaviour** as the main external factors affecting business (both at 50.0%). The significance of economic conditions fell noticeably compared with the spring, as 75.0% of respondents had mentioned them in the previous quarter. The assessment of changes in consumer behaviour remained roughly at the same level as in the previous period (56.3%). Retailers particularly highlighted continuing food price deflation combined with rising energy and labour costs. At the same time, they also expect demand to stabilise.

Changes in the regulatory environment came in third place, with 43.8% of retailers identifying them as a significant external factor, compared with 31.3% in the spring. Respondents particularly mentioned the introduction of new rules which, in their view, increase the administrative burden. These included the unified monthly employer report, new rules on equal pay for men and women, consumer protection regulations, and the implementation of rules associated with the European Packaging and Packaging Waste Regulation (PPWR).

Competition was mentioned by 37.5% of retailers, compared with 31.3% in the spring. Retailers highlighted, above all, the overall increase in competitive pressure, which is leading to price reductions and contributing to deflationary trends. At the same time, respondents from the non-food segment highlighted the arrival of new retail chains and growing competition in online environment.

Political situation was also mentioned as a significant factor by 37.5% of retailers. Its significance has decreased compared with the start of the year, when 56.3% of retailers mentioned it. However, uncertainty persists regarding international geopolitical tensions and their impact on energy prices and supply chains.

Natural disasters or unforeseen events were mentioned as a significant external factor by 18.8% of respondents, whereas none of those surveyed mentioned them in the previous quarter. **Technological developments** and **the availability of raw materials or goods** (both at 12.5%) were among the least frequently mentioned factors this quarter.

EXTERNAL FACTOR	PERCENTAGE OF RESPONDENTS
Economic conditions	50.0% (spring – 75.0%)
Changes in consumer behaviour	50.0% (spring – 56.3%)
Changes in the regulatory environment	43.8% (spring – 31.3%)
Political situation	37.5% (spring – 56.3%)
Competition	37.5% (spring – 31.3%)
Natural disasters or unforeseen events	18.8% (spring – 0%)
Technological developments	12.5% (spring – 25.0%)
Availability of raw materials or goods	12.5% (spring – 25.0%)

METHODOLOGICAL NOTE

This report uses anonymised data from SOCR ČR members collected between 1 and 17 July 2026. The survey was conducted using a questionnaire form, where each question allowed for verbal responses on a scale of 1–5. As part of the data processing, the entire set of respondents was first divided into two groups: food goods and non-food goods. In each of these segments, the average values of the responses for each question were then calculated. These average values were further standardised on a scale of 0–100 using the following formula:

$$\text{Standardised score} = \frac{\text{average value} - \text{minimun value}}{\text{maximum value} - \text{minimum value}} \times 100$$

Where:

- Maximum value = 5
- Minimum value = 1

The values of the sub-indices were calculated as the arithmetic mean of the standardised values of individual responses in a given thematic area. The summary index for a given segment then corresponds to the arithmetic mean of all sub-indices, as each thematic area has the same weight. The resulting value of the SOCR Retail Index (including its sub-parts) corresponds to the average of the responses of both segments.