

IFPA's U.S. Produce Retail Point of Sales Results

August 2025 | The five weeks ending 8/31/2025

Written by:

Anne-Marie Roerink | President | 210 Analytics



Strong Fruit Sales in August, While Vegetable Sales Lagged

After mild growth in July, the first in many months, vegetable dollar and volume sales once again fell behind year-ago levels in August. To the contrary, fruit had a very strong month, representing eight out of the top 10 growth commodities in absolute dollar gains.

WHAT'S NEW

August
IN REVIEW

Flat-to-Down Unit Trajectory for Total Food and Beverages

- Consumer prices rose 2.9% in August, the largest jump since January, while jobless claims hit a four-year high.
- The University of Michigan reported a decline in U.S. consumer sentiment in August from 61.7 in July to 58.2 in August. This marks the first decline in four months, driven by heightened concern about inflation.
- August's total retail food and beverage sales remained on the flat-to-down unit trajectory seen throughout the past several months. In Circana's MULO+ universe, dollar sales increased 2.7% in August, but units dropped 0.4% compared with August 2024. Non-food categories experienced a 0.7% decline in unit sales, just like center-store grocery. Perishables eked out a 0.1% increase in units, combined with a 3.6% increase in dollar sales.
- Value-seeking is driving channel shifting, a focus on essentials and promotional responsiveness. Yet, consumers continue to show willingness to trade up for quality and wellness benefits.
- Supermarkets, known for their hi-lo pricing, generated 42.2% of all food and beverage unit sales in August, down from 47.3% in 2021. Channels that grew share include mass, club and e-commerce.
- Grocery visits increased 2.6% year-over-year, averaging 17.1 per household in the past four weeks. To balance spending, consumers purchased fewer units per trip (-1.6%) for an average of 8.8 items.
- After weeks of stability and improvement for some channels, restaurant traffic declined 1% in August, according to Circana. Premium dining gained momentum, with an increase in restaurant visits for fine dining and casual restaurants. Deal-driven traffic grew, while non-deal trips fell.

MONTHLY
SALES REVIEW

Mixed Weekly Performance in August

Sales during the individual August weeks ranged from \$1.8 to \$1.9 billion. While all five weeks generated dollar gains, the first and fifth weeks lost ground in volume. The middle weeks booked strong gains, offsetting those declines.

Fruit sales drove the majority of dollar and volume sales, with strong contributions by berries, in particular.

	Dollars	\$ vs. YA	Lbs vs. YA
August 2025	\$9.3B	+2.9%	+0.6%
W.E. 8-3-25	\$1.9B	+2.3%	-0.1%
W.E. 8-10-25	\$1.9B	+3.7%	+1.8%
W.E. 8-17-25	\$1.9B	+3.4%	+1.2%
W.E. 8-24-25	\$1.8B	+3.3%	+1.6%
W.E. 8-31-25	\$1.8B	+1.8%	-1.4%

POWER FACTS

STATE OF PRODUCE

August 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.63 +3.5%	\$5.1B	+5.5%	+1.9%
Fresh Vegetables	\$2.03 +1.2%	\$4.1B	-0.1%	-1.3%

Share of Dollars



TOP GROWTH COMMODITIES (NEW \$)

\$ Absolute \$ gain vs. YA

Across the top 10 commodities that added the most new dollars in August, berries were king. Comparing August 2025 to August 2024 shows a gain of nearly \$90 million for the berry category. Cherries were a strong second, adding \$57 million compared to last year.

Sweet potatoes and potatoes were the only vegetables to make the top 10 dollar growth list in August.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$89.3M	\$1.1B	+9.1%
Cherries	+\$56.7M	\$260M	+31.4%
Melons	+\$39.9M	\$655M	0.0%
Bananas	+\$29.0M	\$395M	+2.6%
Oranges	+\$20.0M	\$116M	+18.1%
Apples	+\$19.9M	\$432M	-4.3%
Kiwis	+\$18.7M	\$74M	+30.6%
Peaches	+\$14.0M	\$215M	+6.2%
Sweet potatoes	+\$13.0M	\$74M	+12.2%
Potatoes	+\$10.5M	\$408M	-0.9%



COMMODITY SPOTLIGHT

- Fresh lemons are a \$1.14 million category in Circana's MULO+ universe.
- Lemons have enjoyed growing engagement, with dollar sales increasing 5.3% year-over-year.
- Unit and pound sales increased 6.0%, each.
- Regular lemons generated \$1.0 billion in the past year.
- Seedless lemons are enjoying rapid growth. Now a \$110 million category, sales grew 63% in dollars and 62% in units.
- Meyer lemons remained a niche offering, at \$10 million in annual sales.

Inflation Insights

In August 2025 (the five weeks ending 8/31/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.37, reflecting a renewed upswing in inflation. The average price per unit for total food and beverages increased 3.1%, primarily driven by commodity volatility impacting categories both directly and indirectly. Incremental cost pressures may emerge, influenced by product reformulation initiatives, indirect tariff effects and market uncertainty.

Food & beverages	2019	2020	2021	2022	2023	2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Aug 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.24	\$4.30	\$4.30	\$4.36	\$4.37
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.9%	+2.2%	+2.9%	+2.7%	+3.1%



“Fruit has outperformed vegetables for more than five years and August was no exception. While berries are king in sales and sales growth, fruit gains are supported by a wide range of commodities. This includes traditional powerhouses like bananas, but also tropical and specialty fruits that grew 4.5% in August.

Kiwis, papayas, pineapples, pomegranates and dragon fruit are gaining momentum, fueled by Gen Z and Millennial appetite for trying something new.

– Joe Watson, IFPA's VP of Retail, Foodservice and Wholesale

FUTURE OUTLOOK

- Strength in e-commerce and premium brands reflects consumers' ongoing willingness to invest in convenience and quality as they reassess spending priorities.
- CPG products marketed as sustainable, including environmentally, socially or economically sustainable, have grown at double the rate of conventional options since 2019, boasting a CAGR of 12.4%. They account for 23.8% of the market in 2024.
- Approximately 42.5 million people participate in the Supplemental Nutrition Assistance Program (SNAP) program today. SNAP is a key driver of sales across the CPG industry with benefits and participation in the program shifting with the passage of the Big Beautiful Bill Act. According to Circana, dollar stores currently capture 29.9% of sales from SNAP households, followed by mass, at 22.6%. During the first half of the year, SNAP households purchased groceries online more often.

IFPA Expands Global Retail Market Research

As IFPA continues to develop our global retail market research, we are thrilled to announce our newest commissioned data in partnership with Nielsen IQ. This data will be released monthly for markets in Mexico, Spain, Italy, and the United Kingdom. Each of these markets holds strategic value for understanding consumer trends and how consumers engage in markets outside of the United States.

For any questions, please reach out to Joe Watson, IFPA's VP of Retail, Foodservice, and Wholesale at jwatson@freshproduce.com

METRICS

August 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$9.3B	+2.9%	+0.6%
Fresh fruit	\$5.1B	+5.5%	+1.9%
Berries	\$1.1B	+8.4%	+9.1%
Melons	\$665M	+6.4%	0.0%
Grapes	\$485M	-7.8%	-12.8%
Apples	\$432M	+4.8%	-4.3%
Bananas	\$395M	+7.9%	+2.6%
Avocados	\$333M	-4.3%	+5.7%
Cherries	\$260M	+27.9%	+31.4%
Peaches	\$215M	+6.9%	+6.2%
Mandarins	\$186M	+4.9%	+0.4%
Pineapples	\$133M	+7.4%	+2.3%
Fresh vegetables	Dollars \$4.1B	\$ vs. YA -0.1%	Lbs vs. YA -1.3%
Tomatoes	\$456M	+1.6%	-0.5%
Potatoes	\$408M	+2.6%	-0.9%
Lettuce	\$358M	+2.2%	-5.3%
Onions	\$325M	-4.6%	-1.6%
Salad kits	\$308M	-7.8%	-5.5%
Peppers	\$296M	-0.7%	-0.9%
Cucumbers	\$198M	-0.4%	-2.9%
Carrots	\$156M	+3.0%	-0.1%
Broccoli	\$143M	+1.1%	-2.7%
Mushrooms	\$126M	-7.6%	-5.1%
August sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$10.8B	+6.1%	+0.4%
Refrigerated department, incl. dairy	\$9.9B	+3.5%	0.0%*
Deli department	\$5.6B	+3.5%	+0.8%
Bakery department	\$4.6B	-0.1%	-1.8%*
Seafood department	\$823M	+0.8%	-1.8%

Source: Circana Integrated Fresh, Total U.S., MULO+, fixed and random weight items combined into department views * = unit sales

For more information, please reference IFPA's full consumption data at
<https://www.freshproduce.com/resources/Commodities/>