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

September 2025 | The four weeks ending 9/28/2025

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INTERNATIONAL FRESH PRODUCE ASSOCIATION

Fruit Sales Shine While Vegetables Struggle Heading into Fall

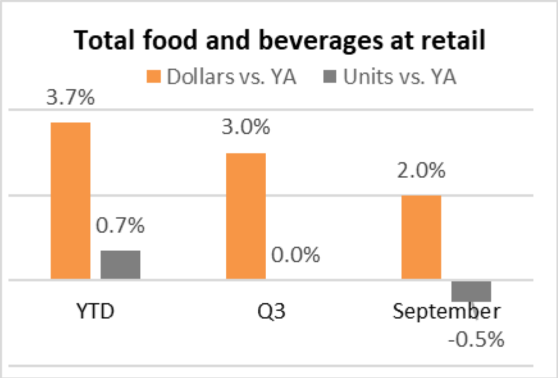
Mild inflation further complicated falling vegetable demand in September, leading to a 3% decline in pound sales year-over-year. Fruit sales excelled with robust gains in dollars, units and pounds as the Millennial impact on produce spending is growing.

WHAT'S NEW

September IN REVIEW

Consumer Concern Leads to Subdued Spending Across the Store

- **Sentiment dips:** U.S. consumer sentiment fell to its lowest level since May, according to the University of Michigan. The Consumer Sentiment Index declined to 55.1 in September, down from 58.2 in August, as inflation and job security concerns weighed on confidence.



- **Spending softens:** Consumer caution is reflected in moderating sales. Year-to-date, total retail food and beverage unit sales were up slightly (+0.7%), but fell to zero gains in the third quarter. In September, dollar growth slowed to just 2%, while unit sales declined 0.5%.
- **Category performance:** Center-store grocery saw a 1.0% decline in unit sales, while perishables inched up 0.3%, primarily driven by meat, fruit and deli-prepared food gains.
- **Channel shifts:** Club's share of total food and beverage unit sales has risen to 5.8%, up from 4.7% in 2021. Online sales grew to 4.9% from 2.5% in 2021, while supermarkets' share declined to 42.1% from 47.3%.
- **Shopping behavior:** Trips rose 3.1% year over year in September, averaging 17.3 grocery visits per household. To manage budgets, consumers purchased fewer items per trip (-1.6%), averaging 8.8 items.
- **Foodservice dynamics:** Restaurant sales continued to face trip declines combined with value-seeking. Similar to retail, 30% of commercial foodservice traffic over the past 12 months was driven by deals, per Circana. With consumers using digital coupons and loyalty apps, $10 has become the new "sweet spot" for value. Breakfast remains the most economically sensitive daypart, with many consumers skipping or eating at home.

MONTHLY SALES REVIEW

Mixed Weekly Performance in August

Weekly sales in September remained steady, particularly during the first three weeks. Dollar sales rose about 2% year- over-year, while volume showed slight gains across all four weeks.

Weekly trends mirrored the monthly pattern, with fruit gains offsetting declines in vegetable sales.

	Dollars	$ vs. YA	Lbs vs. YA
September 2025	**$7.1B**	**+1.5%**	**+0.4%**
W.E. 9-7-25	$1.8B	+2.4%	+0.3%
W.E. 9-14-25	$1.8B	+1.9%	+0.4%
W.E. 9-21-25	$1.8B	+1.6%	+0.5%
W.E. 9-28-25	$1.7B	+0.1%	+0.3%

Sources:
Circana, Integrated Fresh, MULO+ | August is the four weeks ending 9/28/2025

POWER FACTS

STATE OF PRODUCE

Sep. 2025	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.77 | +0.9%	$3.7B	+4.1%	+3.1%
Fresh Vegetables	$1.94 | +1.5%	$3.2B	-1.4%	-2.9%

Share of Dollars

$7.1B | +1.5%
Fresh Produce Department

$767M | +1.8%
Frozen Fruits and Vegetables

$443M | +3.9%
Shelf Stable Fruits

$587M | -1.1%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

Across the top 10 commodities that added the most dollars in September, berries were king. Comparing September 2025 to September 2024 shows a gain of nearly $55 million for the berry category.

Cherries were a strong second, adding $33 million compared to last year. Sweet potatoes and garlic were the only vegetables to make the top 10 dollar growth list in September. Yams and garlic are part of viral TikTok trends.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Berries	**+$54.9M**	**$897M**	**+12.3%**
Cherries	+$32.8M	$37M	+543.4%
Bananas	+$21,2M	$313M	+1.9%
Kiwis	+$16.6M	$61M	+32.3%
Melons	+$15.8M	$342M	+4.9%
Apples	+$15.1M	$392M	-2.1%
Oranges	+$13.7M	$90M	+16.6%
Sweet potatoes	+$9.7M	$66M	+9.6%
Mandarins	+$6.8M	$172M	+2.4%
Garlic	+$5.9M	$49M	+15.5%

COMMODITY SPOTLIGHT

- Yams/sweet potatoes have enjoyed growing consumer demand over the past year.
- Sales rose 12.2% to $868 million.
- This reflects a combination of 6.1% inflation on a per pound basis along with demand growth.
- Unit sales increased 6.3% over the past year and 12% over the levels seen three years ago.
- Volume sales grew 5.7% with sales closing in on 660 million pounds.
- Sales spike during the end-of-year holidays with a secondary spike during the Easter holidays,
- TikTok trends appear to be driving the current spike in demand.

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Sources:
Circana, Integrated Fresh, MULO+

Inflation Insights
The September 2025 price per unit across all foods and beverages in the Circana MULO+ universe stood at $4.37, up 2.5% over September 2024. Most categories showed modest but accelerating price growth and some categories like coffee and meat experienced sharper increases. Following a year of minimal price growth, multiple cost drivers, such as product reformulation initiatives, indirect tariff effects, market uncertainty and elevated commodity volatility, are putting pressure on consumer prices.

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%

"After spotting sweet potatoes and garlic among the fastest growing items in September, a bit of investigating once more proved the power of TikTok. Sweet potato sales appear to be boosted by the TikTok hot honey sweet potato beef bowl that pairs roasted or air-fried sweet potatoes with seasoned ground beef, avocado, cottage cheese and hot honey. The spicy pickled garlic TikTok trend involves marinating pickled garlic cloves in sriracha sauce, chili flakes and thyme. The latter is also growing in dollars, units and pounds. The lesson is clear: monitoring social media trends and moving quickly to capitalize on viral recipes can result in measurable sales growth. And perhaps more importantly, lead to new commodities purchased and new habits formed."

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

FUTURE OUTLOOK

Well-being focused consumers have $1.3 trillion in buying power — up 3.7% from last year according to Circana.

- Seeking to live longer and healthier, Americans are turning to physical and mental wellness, with 70% making self-care a priority. Improved physical health remains the top goal in the U.S., followed by reduced stress and anxiety.
- Focus, stress relief and productivity are areas of particular interest to Gen Z.
- Healthy eating continues to gain attention, as do nutritional supplements. Consumers are increasingly seeking protein beverages and powders to maximize nutrition through food and drinks, with functional and fortified foods now firmly mainstream.
- According to Circana, active GLP-1 usage has grown to 5.3% of U.S. adults, while per capita calories have shifted away from alcohol and snacks toward protein.

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

Sources:
Circana, MULO+, total US

METRICS

September 2025 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$7.1B**	**+1.5%**	**+0.4%**
Fresh fruit	**$3.7B**	**+4.1%**	**+3.1%**
Berries	$897M	+6.5%	+12.3%
Grapes	$482M	-2.2%	-5.5%
Apples	$392M	+4.0%	-2.1%
Melons	$342M	+4.8%	+4.9%
Bananas	$313M	+7.3%	+1.9%
Avocados	$252M	-9.6%	+5.5%
Mandarins	$172M	+4.1%	+2.4%
Peaches	$121M	+4.5%	+6.4%
Pineapples	$91M	+2.4%	-1.3%
Oranges	$90M	+18.0%	+16.6%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$3.2B**	**-1.4%**	**-2.9%**
Tomatoes	$341M	+1.0%	-1.2%
Potatoes	$324M	+0.1%	-2.7%
Lettuce	$268M	+1.3%	-5.3%
Onions	$254M	-3.5%	-2.9%
Salad kits	$237M	-9.2%	-8.2%
Peppers	$230M	-2.5%	-2.8%
Cucumbers	$152M	-5.8%	-5.6%
Carrots	$130M	+2.8%	-0.7%
Broccoli	$114M	-0.5%	-5.1%
Mushrooms	$102M	-8.3%	-5.8%
September sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat department	$8.5B	+6.0%	+0.5%
Refrigerated department, incl. dairy	$7.9B	+1.0%	+0.6%*
Deli department	$4.4B	+3.5%	+1.1%
Bakery department	$3.6B	-0.8%	-2.7%*
Seafood department	$620M	+0.5%	-3.1%

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/