



Volume Growth Acceleration in November

Building onto years of performance reporting for fresh fruit and vegetable sales at retail in the United States, IFPA is launching a global report series to provide insight into trends around the world. This report highlights the major vegetable sales trends in Italy.

Italy — Marketplace Review (September/October 2025)

- Annual headline inflation eased further in November 2025, with the national consumer price index up +1.1% year-on-year, down from +1.2% in October, reflecting slower price increases across transport services, food categories, and regulated energy products. Core inflation (excluding energy and unprocessed food) also moderated to around +1.7%.
- The inflation outlook remains subdued, with projections from national and central bank sources indicating moderate price pressures through 2026, underpinned by weak demand and lower energy costs.
- Labor market data show some cooling, but overall employment grew on an annual basis. In November 2025, employment fell slightly month-on-month (-0.1%), yet the unemployment rate declined to about 5.7%, the lowest on record, while inactivity edged up. Over the quarter (Sept–Nov) employment rose modestly vs. the prior quarter.
- Italy's economy showed modest growth in Q3 2025, with real GDP expanding about +0.1% quarter-on-quarter following a small contraction earlier in the year. Indicators into late 2025 point to ongoing softness in domestic demand for 2026.
- Official projections suggest moderate growth through 2025 and 2026 (e.g., about +0.5% in 2025 and around +0.8% in 2026), tempered by weak external demand and structural challenges such as productivity and demographics.

Sales Performance — Dollars

Dollar sales patterns for the four weeks ending November 2nd were very different from those seen all year. Fresh vegetable dollar sales decreased year-on-year in the shorter term, while they increased by nearly 4% in the 52-week view. This is due to individual commodities, such as lettuce, potatoes, mushrooms and tomatoes moving from year-over-year growth to decreases.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh vegetables	\$362.3M	-1.3%	\$4.8B	+3.9%
Salad	\$84.5M	-2.5%	\$1.2B	+0.1%
Tomatoes	\$54.7M	-8.6%	\$863.8M	+8.5%
Potatoes	\$51.4M	-4.5%	\$662.7M	+0.1%
Onions	\$22.4M	+4.3%	\$279.8M	-0.3%
Carrots	\$20.4M	+1.5%	\$261.1M	+1.8%
Mushrooms	\$18.2M	-1.9%	\$167.3M	+3.9%
Lettuce	\$9.7M	-5.4%	\$133.6M	+3.4%
Peppers	\$6.9M	-0.8%	\$96.0M	+8.3%
Asparagus (green)	\$1.5M	+13.3%	\$89.6M	-2.2%
Broccoli	\$12.0M	-1.3%	\$88.0M	+4.2%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 2, 2025

The smaller commodities show a much greater range of performances, especially in the quad-week period. In part, this is because the changes are reflecting a smaller base and thus bigger swings up and down, but seasonality and inflation/deflation play important roles as well. Cucumbers and radishes are among the fastest-growing smaller commodities in the past year.

Italy

Continued	Latest 4 weeks		Latest 52 weeks		
	Dollar sales (in USD)	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Artichokes	\$838K		+138.8%	\$45.4M	+8.0%
Celery	\$3.3M		-1.6%	\$40.8M	+11.5%
Cucumbers	\$1.9M		+2.8%	\$33.6M	+26.2%
Radishes	\$919K		+5.0%	\$15.9M	+13.0%
Beets	\$1.2M		+6.6%	\$13.7M	+5.2%
Rucola	\$850K		-18.4%	\$12.4M	-13.9%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 2, 2025

Sales Performance — Volume

The quad-week showed a strong performance in kilograms, up 6.3% year-over-year. This was driven by substantial growth in tomatoes, potatoes, onions and carrots, the four largest sellers. The full-year view also shows substantial growth for smaller commodities, such as artichokes, cucumbers and radishes.

Volume (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh vegetables	94.6M	+6.3%	1.2B	+4.8%
Salad	10.9M	-0.2%	149.6M	+0.8%
Tomatoes	10.8M	+20.8%	173.2M	+4.5%
Potatoes	32.4M	+6.3%	386.6M	+5.7%
Onions	8.5M	+4.6%	104.4M	+4.2%
Carrots	10.5M	+0.9%	132.4M	+3.1%
Mushrooms	2.4M	+2.9%	22.6M	+0.2%
Lettuce	1.7M	-0.4%	23.4M	+7.7%
Peppers	1.5M	+4.1%	18.5M	+5.9%
Asparagus (green)	233K	+58.4%	10.6M	-3.6%
Broccoli	2.7M	-3.6%	24.3M	+6.4%
Artichokes	44K	+105.7%	3.6M	+19.0%
Celery	747K	-1.7%	9.4M	+6.6%
Cucumbers	333K	+24.4%	5.7M	+29.9%
Radishes	170K	+5.8%	2.9M	+16.2%
Beets	425K	+4.3%	4.9M	+5.1%
Rucola	80K	-20.5%	1.2M	-18.3%
Turnips	127K	+34.4%	1.4M	+13.4%
Eggplant	156K	+15.3%	1.5M	+13.5%
Leeks	180K	+8.1%	2.7M	-4.2%
Endive	134K	+2.8%	1.6M	+20.2%
Beans	118K	+24.7%	1.6M	+1.1%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 2, 2025