



December Delivers 3.0% Volume Growth for Fresh Produce

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 (December 2025)

- Annual headline inflation edged slightly higher at the end of 2025, with the national consumer price index up about +1.2% year-on-year in December, compared with +1.1% in November. The increase reflects modest price pressures across several categories. Core inflation (excluding energy and unprocessed food) rose to around +1.8%, while food, household goods and personal care prices increased more noticeably.
- The inflation outlook remains relatively subdued, with projections from national and central bank sources pointing to moderate price pressures through 2026, supported by lower energy costs and still-soft domestic demand. Inflation is expected to remain close to the low-to-mid 1% range in the near term.
- Labor market data show continued resilience. In December 2025, employment declined slightly month-on-month (-0.1%) and the unemployment rate fell to about 5.6%, a record low. Over the quarter (Oct-Dec), employment increased compared with the previous quarter.
- Italy's economy showed modest growth toward the end of 2025, with GDP expanding about +0.3% quarter-on-quarter in Q4, following earlier weak performance during the year. Domestic demand and investment supported activity, though overall momentum remained limited.
- Official projections continue to point to moderate economic growth, with the Italian economy expanding around +0.5% in 2025 and forecasts suggesting approximately +0.7% growth in 2026, constrained by weak external demand, structural productivity challenges, and demographic trends.

Sales Performance — Dollars

December generated \$340 million in fresh fruit and vegetable sales. This was down 1.5% from year-ago levels, contrary to a gain of 3.1% in the full-year view. All the sales powerhouses, including salad, tomatoes, potatoes and onions, lost ground in dollar sales in the four weeks ending December 28, 2025. Tomatoes did post growth in the 52-week view.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh vegetables	\$339.4M	-1.5%	\$4.85B	+3.1%
Salad	\$74.7M	-0.7%	\$1.18B	-0.2%
Tomatoes	\$48.5M	-3.2%	\$863.8M	+6.3%
Potatoes	\$55.3M	-6.3%	\$661.1M	-0.8%
Onions	\$22.0M	-0.9%	\$281.8M	+0.5%
Carrots	\$19.6M	+1.9%	\$263.7M	+2.8%
Mushrooms	\$14.9M	+0.2%	\$168.9M	+3.2%
Lettuce	\$8.4M	+3.8%	\$134.2M	+3.3%
Peppers	\$5.3M	-4.9%	\$96.1M	+6.3%
Asparagus (green)	\$1.0M	+13.6%	\$90.4M	-2.2%
Broccoli	\$8.0M	-3.7%	\$88.2M	+1.9%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending December 28, 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

Italy

swings up and down, but seasonality and inflation/deflation play important roles as well. Cucumber gains accelerated even further, to +37% above year-ago levels.

Continued Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Artichokes	\$5.3M	-10.1%	\$44.2M	+2.9%
Celery	\$3.9M	-3.0%	\$40.9M	+9.9%
Cucumbers	\$1.7M	+36.9%	\$34.5M	+27.0%
Radishes	\$1.0M	+11.3%	\$16.2M	+12.9%
Beets	\$1.1M	+14.7%	\$14.0M	+8.5%
Rucola	\$637K	-15.2%	\$12.2M	-15.0%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending December 28, 2025

Sales Performance – Volume

The quad-week showed a strong performance in kilograms, up 3.0% year-over-year, which means the December dollar decline was driven by deflation. Among the larger sellers, tomatoes had the strongest volume growth, at +10.2%, followed by carrots and potatoes.

Volume (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh vegetables	92.5M	+3.0%	1.2B	+5.0%
Salad	9.6M	+1.6%	149.6M	+0.9%
Tomatoes	9.7M	+10.2%	176.1M	+6.8%
Potatoes	35.0M	+2.0%	389.1M	+5.5%
Onions	8.4M	+0.8%	104.8M	+4.4%
Carrots	10.3M	+3.7%	133.2M	+3.6%
Mushrooms	2.0M	-0.2%	22.6M	+0.3%
Lettuce	1.3M	+4.6%	23.4M	+7.4%
Peppers	971K	-14.6%	18.3M	+3.7%
Asparagus (green)	238M	+226.1%	10.9M	-0.9%
Broccoli	2.5M	+0.9%	24.3M	+2.5%
Artichokes	378K	-3.9%	3.5M	+12.6%
Celery	906K	-0.1%	9.4M	+6.5%
Cucumbers	220K	+13.9%	5.8M	+28.3%
Radishes	209K	+11.0%	2.9M	+15.8%
Beets	403K	+14.8%	5.0M	+7.8%
Rucola	59K	-18.5%	1.2M	-19.8%
Turnips	137K	-13.3%	1.4M	+10.0%
Eggplant	142K	+4.8%	1.5M	+12.8%
Leeks	112K	-17.1%	2.7M	-4.2%
Endive	163K	+13.7%	1.6M	+19.2%
Beans	99K	-4.6%	1.6M	+3.2%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending December 28, 2025