



Double-Digit Fruit Unit Gains in December

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 trends in the Mexican marketplace.

Methodology Review

- Nielsen IQ assembled the high-level trends in fresh fruit and vegetable sales in Mexico.
- Seven fruit commodities are shown in greater detail.
- The reporting will continue to expand as more information becomes available.

Marketplace Review

- Headline inflation moderated slightly toward the end of 2025. In December 2025, annual inflation stood at 3.7% year-on-year, easing from 3.8% in November and remaining within Banco de México's target range of 3%-4%. Core inflation also improved modestly to around 4.3%, down from about 4.4% the prior month.
- Banco de México (Banxico) continued its monetary easing cycle, cutting the benchmark overnight rate to 7.0% in December 2025, the lowest level since 2022. Policymakers signaled further easing, though balancing slowing economic activity with still-elevated core inflation.
- Mexico's economic momentum remained weak heading into the end of 2025. Following a -0.3% quarter-on-quarter contraction in Q3, indicators pointed to continued softness in economic activity late in the year, prompting expectations for only modest full-year growth of around +0.3% to +0.4% in 2025.
- Most forecasters continue to expect a slow and uneven recovery, with GDP growth in 2026 projected at roughly 1.0%-1.1%, reflecting weak domestic momentum and uncertainty.
- Employment conditions are expected to improve only gradually. Forecasts suggest employment growth of roughly +0.8% in 2025 and about +1.7% in 2026, consistent with the broader outlook for modest economic expansion.

Sales Performance

December delivered solid gains for fruit sales, up 7.1% year-on-year. While vegetable sales were slightly higher (\$142 million versus \$130 million for fruit), dollars were down year-on-year.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$130.0M	+7.1%	\$1.89B	+5.9%
Fresh vegetables	\$142.1M	-0.6%	\$1.94B	-3.2%

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

A look at unit sales shows the impact of deflation. Both fruit and vegetables increased unit sales by double digits in December. In fact, fresh vegetables grew 16.3% over December 2024.

Vegetable sales have been strong all year, with 10.9% growth in the 52-week view.

Unit sales (Transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Unit vs. year ago	Unit Sales	Units vs. year ago
Fresh fruit	64.3M	+10.6%	955.1M	+1.0%
Fresh vegetables	86.8M	+16.3%	1.23B	+10.9%

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

Price per Unit

While vegetable prices have decreased far more, fruit prices have moved from increasing during the first three quarters of the year, to deflation to end the year. Fruit prices came down 3.2% compared with December 2024, while the yearly average stood at +4.8%.

Price per unit	Latest 4 weeks		Latest 52 weeks	
	Price per unit	Change vs. YA	Price per unit	Change vs. YA
Fresh fruit	\$2.02	-3.2%	\$1.99	+4.8%
Fresh vegetables	\$1.64	-14.6%	\$1.57	-12.7%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending October 5, 2025

Commodity Performance – Fruit Dollar Sales

Bananas are easily the biggest seller in Mexican fresh produce sales at retail. Generating \$19 million in December and \$315 million in the annual view, the ongoing growth in banana dollar sales was an important factor in the overall fruit gains, alongside lemons and pineapples.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$130.0M	+7.1%	\$1.9B	+5.9%
Bananas	\$18.7M	+7.0%	\$313.8M	+3.1%
Lemon	\$9.8M	+8.9%	\$157.8M	-1.4%
Grapes	\$11.9M	-12.3%	\$144.2M	+12.8%
Mangoes	\$1.7M	-5.1%	\$107.9M	+2.4%
Pineapples	\$5.8M	+15.3%	\$90.3M	+17.1%
Melon	\$3.5M	-4.4%	\$77.8M	+5.7%

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

Commodity Performance – Fruit Unit Sales

Deflation affected dollar sales but unit growth was strong. Fruit unit sales gained 10.6% in December, much higher than the 1.0% growth seen in the full-year view. Unit growth was predominantly driven by bananas, alongside lemons, pineapples and melons.

Unit sales (transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Units vs. year ago	Unit sales	Units vs. year ago
Fresh fruit	64.3M	+10.6%	955.1M	+1.0%
Bananas	16.2M	+9.0%	231.9M	+2.4%
Lemon	5.9M	+3.5%	80.8M	+4.6%
Grapes	2.2M	-12.3%	31.7M	+0.0%
Mangoes	352K	-23.6%	51.6M	-0.5%
Pineapples	4.2M	+39.9%	57.0M	+16.7%
Melon	1.9M	+7.6%	47.2M	+3.8%

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