



Sales Strengthened as Prices Deflated

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 continued to moderate in November 2025, easing to approximately 3.4% year-on-year, down from 3.6% in October. Core inflation remains elevated but showed further gradual improvement, at roughly 4.2%.
- Banco de México (Banxico) lowered its overnight interbank policy rate to 7.25% in November 2025, marking the lowest level since mid-2022. The central bank emphasized a cautious easing path, balancing slowing economic activity against still-elevated core inflation.
- Mexico's economic momentum weakened further into late 2025. Real GDP contracted -0.3% quarter-on-quarter in Q3 2025, prompting Banxico to revise its 2025 GDP growth forecast down to around +0.3%.
- Most forecasters continue to expect a slow and uneven recovery, with GDP growth in 2026 projected at approximately 1.0%–1.1.
- Employment growth is expected to remain subdued, with forecasts calling for job gains of about +0.8% in 2025 and +1.7% in 2026.

Sales Performance

Vegetables had the slightly higher sales in the four weeks ending early October. However, dollar sales were down year-on-year in the four- and 52-week periods. Fruit sales gained in both.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$129.2M	+1.4%	\$1.80B	+5.5%
Fresh vegetables	\$142.5M	-3.8%	\$1.9B	-1.7%

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

Unit sales looked very different, reflecting the deflationary conditions in fresh fruit and vegetables in Mexico. Vegetable unit sales show robust growth in both the short- and longer-term views of +17.3% and +7.3%, respectively. Fruit unit sales are also improving. While down 0.8% in the 52-week view, fruit unit sales grew 12.4% in the latest four weeks.

Unit sales (Transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Unit vs. year ago	Unit Sales	Units vs. year ago
Fresh fruit	163.4M	+12.4%	944.5M	-0.8%
Fresh vegetables	95.4M	+17.2%	1.20B	+7.3%

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

Price per Unit

The different trajectories for fruit and vegetables are driven by robust deflation for vegetables, but inflation for fruit in the 52-week view. In the most recent four weeks, prices for fruit were also down, though not as much as they were for vegetables.

Price per unit	Latest 4 weeks		Latest 52 weeks	
	Price per unit	Change vs. YA	Price per unit	Change vs. YA
Fresh fruit	\$1.90	-4.6%	\$1.91	+6.3%
Fresh vegetables	\$1.49	-17.9%	\$1.54	-8.4%

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

Commodity Performance — Fruit Dollar Sales

Bananas were twice the size of the number two commodity, lemons, in the four weeks ending November 2nd, 2025. Lemons and grapes were very similar in size, but had vastly different growth performances. Grapes and pineapples have had among the highest growth all 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	\$129.2M	+1.4%	\$1.80B	+5.5%
Bananas	\$22.6M	+0.9%	\$299M	+2.8%
Lemon	\$10.5M	-11.1%	\$150M	-4.3%
Grapes	\$11.0M	+20.0%	\$139.0M	+12.9%
Mangoes	\$0.6M	+15.2%	\$102.8M	+3.6%
Pineapples	\$6.0M	+20.4%	\$84.0M	+14.5%
Melon	\$5.4M	+4.3%	\$74.8M	+7.9%

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

Commodity Performance — Fruit Unit Sales

The slowdown in dollar growth has everything to do with pricing. Where fruit prices were inflating throughout most of the year, the deflation seen in the most recent four weeks is pulling down robust demand growth of 6.2%. Lemons, melons and grapes had double-digit unit growth in the short-term view and banana unit sales grew 7.9%.

Unit sales (transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Units vs. year ago	Unit sales	Units vs. year ago
Fresh fruit	68.0M	+6.2%	944.5M	-0.8%
Bananas	19.3M	+7.9%	230.6M	+0.9%
Lemon	6.2M	+13.3%	80.3M	+5.1%
Grapes	2.4M	+42.8%	31.7M	-5.4%
Mangoes	0.3M	-2.6%	51.6M	+0.4%
Pineapples	3.5M	+30.1%	54.2M	+10.5%
Melon	3.4M	+23.8%	47.2M	+2.7%

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