



Onions, Carrots and Garlic Boost Sales for Vegetables

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 Spanish marketplace.

Spain Marketplace Review

- Spain's economy continued to show solid performance through late 2025, with Q3 2025 real GDP rising about +0.6% quarter-on-quarter and an annual expansion near +2.8% year-on-year, confirming sustained outperformance among major euro-area economies.
- The broader outlook remains positive. The European Commission and other forecasters see full-year real GDP growth for 2025 around +2.9%, with moderation to roughly +2.3% in 2026.
- Headline inflation continued easing, with Spain's CPI around ~3.0% in November 2025, slightly lower than earlier readings. Core inflation (excluding energy and unprocessed food) remained relatively contained, at approximately 2.6%.
- Unemployment sits around 10.5% in the third quarter with indications of modest further improvement toward year-end.

Source GDP and inflation: National Statistics Institute

Sales Performance

The four weeks ending November 23, 2025 generated about \$1 billion in fresh produce sales among the Spanish retailers in the NielsenIQ universe. Fruit edged out vegetables in dollar sales by about \$50 million and also had the higher year-on-year growth rate. The same holds true for the 52-week patterns.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$526.6M	+14.0%	\$7.3B	+14.2%
Fresh vegetables	\$487.9M	+4.5%	\$6.4B	+7.6%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 23, 2025

Commodity Performance — Fruit

All of the big fruit commodities posted substantial year-over-year growth in the quad-week period. Likewise, many grew by double digits in the 52-week view. Without unit or volume data, it is hard to judge whether these are inflation-driven or demand-driven changes.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$526.6M	+14.0%	\$7.32B	+14.2%
Bananas/plantains	\$90.0M	+19.7%	\$1.1B	+13.7%
Apples	\$44.8M	+6.7%	\$562.4M	+4.8%
Avocados	\$42.0M	+15.6%	\$534.7M	+18.0%
Oranges	\$37.5M	+5.1%	\$526.4M	+4.4%
Kiwis	\$43.2M	+16.3%	\$455.8M	+22.7%
Grapes	\$39.9M	+16.6%	\$401.5M	+16.4%
Mandarins	\$43.5M	+9.5%	\$378.6M	+5.6%
Melons	\$15.3M	+9.8%	\$350.5M	+11.2%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 23, 2025

Smaller commodities show very different performances based on seasonality. For instance, peach sales have dwindled to a trickle, which they had substantial and growing sales in the full year.

Continued (USD dollar sales)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Lemon/limes	\$18.4M	+27.4%	\$239.7M	+32.7%
Pears	\$21.6M	+0.3%	\$223.0M	+6.8%
Cherries	\$0.9M	+90.4%	\$172.5M	+13.9%
Peaches	\$1.6M	-26.6%	\$148.1M	+25.9%
Mangoes	\$12.8M	+19.7%	\$145.3M	+1.2%
Nectarines	\$0.2M	-14.8%	\$129.8M	+10.9%
Pineapples	\$7.3M	+12.3%	\$105.7M	+10.3%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 23, 2025

Commodity Performance – Vegetables

Vegetables had a strong month though the rate of gain (+4.5%) was below that of the total year (+7.6%). This was mostly due to tomatoes and potatoes that posted somewhat weaker performances in November. Others, including onions, carrots and garlic, had very strong growth rates in December. These commodities also did well year-round. Garlic is also an up-and-comer in the U.S. marketplace thanks to social media fame.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh vegetables	\$487.9M	+4.5%	\$6.4B	+7.6%
Tomatoes	\$78.1M	+4.1%	\$1.1B	+10.7%
Potatoes	\$74.6M	-2.5%	\$981M	+3.2%
Onions	\$39.7M	+14.4%	\$537M	+9.3%
Salads	\$30.0M	+6.0%	\$436.0M	+8.1%
Peppers	\$27.2M	+8.2%	\$384.9M	+10.4%
Mushrooms	\$26.8M	+1.3%	\$302.9M	+3.8%
Carrots	\$17.5M	+11.4%	\$212.5M	+6.7%
Garlic	\$14.6M	+12.8%	\$190.6M	+16.6%
Lettuce	\$12.2M	-7.1%	\$181.7M	+2.0%
Cucumbers	\$8.9M	+3.3%	\$146.0M	+13.2%
Leeks	\$11.8M	+7.3%	\$128.2M	+6.9%
Broccoli	\$8.0M	+1.1%	\$98.2M	+7.6%
Asparagus	\$6.8M	+1.8%	\$93.2M	+2.5%
Eggplant	\$5.3M	-4.0%	\$66.2M	+4.1%
Cauliflower	\$5.3M	-6.5%	\$59.4M	-0.5%
Cabbage	\$5.4M	+6.9%	\$54.1M	+8.2%
Artichokes	\$2.2M	+15.3%	\$45.0M	+6.3%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 23, 2025