Four and 52 weeks ending January 25, 2026

Strong Start of the Year 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 trends in the Spanish marketplace.

Spain Marketplace Review

- Spain's economy continued to show strong performance into the end of 2025. Real GDP rose about +0.8% quarter-on-quarter in Q4 2025, bringing annual growth for 2025 to roughly +3.2%, reinforcing Spain's position as one of the fastest-growing major economies in the euro area.
- The broader outlook remains positive, though growth is expected to moderate somewhat. Most forecasts place real GDP growth around +3.2% for 2025, with expansion slowing to about +2.3% in 2026 as domestic demand stabilizes and external conditions remain mixed.
- Headline inflation ticked up slightly toward the end of the year. Spain's CPI rose to around +3.1% year-on-year in December 2025, compared with roughly +3.0% in November. Core inflation (excluding energy and unprocessed food) remained more contained at about +2.6%, reflecting moderate underlying price pressures.
- Labor market conditions continued to improve gradually. The unemployment rate remained close to 10.5% in late 2025, with employment growth continuing and further modest improvements expected into 2026.

Source GDP and inflation: National Statistics Institute

Sales Performance

The four weeks ending January 25, 2026 generated $1.0 billion in fresh produce sales among the Spanish retailers in the NielsenIQ universe. Fruit and vegetables were virtually the same size, at $515 million, each, with slightly stronger gains for fruit.

Dollar sales (in USD)	Latest 5 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	$514.6M	+7.3%	$7.45B	+13.8%
Fresh vegetables	$514.7M	+5.6%	$6.47B	+7.8%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending January 25, 2026

Commodity Performance — Fruit

All of the big fruit commodities posted substantial year-over-year growth in the four-week period, especially avocados. Likewise, many grew by double digits in the 52-week view, with big contributions by bananas, avocados, kiwis and grapes.

Dollar sales (in USD)	Latest 5 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	**$514.6M**	**+7.3%**	**$7,45B**	**+13.8%**
Bananas/plantains	$74.3M	+4.2%	$1.1B	+14.3%
Apples	$47.0M	+6.4%	$571.9M	+6.0%
Avocados	$39.5M	+11.0%	$546.5M	+17.1%
Oranges	$44.9M	+0.0%	$531.8M	+5.7%
Kiwis	$32.7M	+0.4%	$461.0M	+19.5%
Grapes	$48.0M	+14.9%	$411.3M	+15.0%
Mandarins	$59.4M	+13.6%	$397.3M	+7.9%
Melons	$9.2M	+1.1%	$353.2M	+10.7%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending January 25, 2026

Smaller commodities show very different performances based on seasonality. Peach and nectarine sales geared up quickly, as did cherries.

Continued (USD dollar sales)	Latest 5 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Lemon/limes	$17.0M	+22.7%	$248.7M	+32.9%
Pears	$18.4M	+0.2%	$224.6M	+5.4%
Cherries	$4.2M	+34.2%	$176.4M	+14.0%
Mangoes	$10.1M	+14.1%	$152.0M	+23.2%
Peaches	$315K	+141.3%	$146.5M	+1.4%
Nectarines	$1.0M	+205.4%	$131.4M	+11.7%
Pineapples	$9.4M	+7.6%	$104.4M	+8.2%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending January 25, 2026

Commodity Performance — Vegetables

Vegetable growth accelerated to +5.6% versus December's +5.4%. Yet, growth remained below that of the total year (+7.8%). This was mostly due to potatoes and salad that posted somewhat weaker performances in January. Others, including onions, peppers and carrots, had very strong growth rates to start of the year. These commodities also did well year-round. Among the smaller sellers, garlic and cucumbers are exciting opportunities to drive growth.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh vegetables	**$514.7M**	**+5.6%**	**$6.49B**	**+7.8%**
Tomatoes	$80.7M	+6.9%	$1.13B	+11.4%
Potatoes	$79.1M	+0.1%	$986.3M	+1.6%
Onions	$42.7M	+11.0%	$549.6M	+11.9%
Salads	$27.6M	-1.5%	$438.7M	+7.2%
Peppers	$32.0M	+16.2%	$395.8M	+12.2%
Mushrooms	$25.5M	+0.3%	$305.7M	+3.4%
Carrots	$18.5M	+10.6%	$217.9M	+8.3%
Garlic	$16.5M	+13.9%	$196.4M	+17.9%
Lettuce	$12.7M	-1.0%	$182.2M	+1.5%
Cucumbers	$8.5M	+12.5%	$148.8M	+13.7%
Leeks	$13.5M	+9.2%	$131.2M	+6.8%
Broccoli	$8.5M	+3.7%	$99.6M	+8.7%
Asparagus	$7.0M	+3.4%	$94.5M	+2.3%
Eggplant	$5.7M	+5.4%	$67.2M	+3.8%
Cauliflower	$5.4M	-0.9%	$60.0M	+1.1%
Cabbage	$5.6M	+6.1%	$55.1M	+7.5%
Artichokes	$7.2M	+0.5%	$45.2M	+6.7%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending January 25, 2026