



Continued split performance between fruit and 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 dives into fresh fruit and vegetable sales in the U.K.

U.K. Marketplace Review

- The U.K. economy rebounded in November with monthly GDP growth of +0.3%, stronger than expected after a contraction in October. Production and services were the main contributors. Over Q4 (to November), output showed modest quarterly expansion around +0.1%.
- Headline Consumer Price Index (CPI) inflation continued to ease, falling to around 3.2% in November 2025, its lowest in several months, as food and other price pressures softened.
- The labor market remained soft with the unemployment rate at approximately 5.0% for July–September data (the latest available), modestly elevated compared with earlier in the year.
- Employment and wage growth indicators point to a cooling job market, complicating policymaker decisions.
- The Bank of England's Bank Rate was held at 4.0% in early November, with the Monetary Policy Committee narrowly maintaining policy and markets pricing in a likely, but not immediate, rate cut as inflation eases and growth remains uneven.
- Some external forecasters have upgraded growth expectations for 2025 to around 1.4%–1.5%, reflecting better-than-anticipated activity in 2025, but project slower or modest momentum into 2026 as domestic demand, business investment, and consumption remain subdued.

Sales Performance

Fruit sales exceeded vegetable sales in the latest four weeks by \$175 million. Additionally, fruit sales gained 8.8% year-over-year while vegetable sales stayed within 1-percentage point of year-ago levels. November growth rates were in line with the 52-week performance.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$655.3M	+8.8%	\$9.5B	+8.8%
Fresh vegetables	\$480.4M	+0.9%	\$6.1B	+1.2%

Fruit and vegetable's unit performances were also very different. Fruit unit sales gained a robust 5%, while vegetable unit sales fell 1.6% behind year-ago levels. The patterns in the full-year view are similar.

Unit sales (packages)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Units vs. year ago	Unit sales	Units vs. year ago
Fresh fruit	355.3M	+5.0%	5.0B	+4.1%
Fresh vegetables	324.8M	-1.6%	4.2B	-1.3%

Volume patterns mirrored unit sales, with gains for fruit, but decreases for vegetables. The November performance for fruit and vegetables was very similar to the full-year trends.

Volume sales (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh fruit	337.3M	+4.7%	4.8B	+4.3%
Fresh vegetables	199.2M	-1.8%	2.6B	-2.4%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 29, 2025

Commodity Performance — Fruit

In the 52-week view, all fruit commodities grew dollar sales, with high growth rates for prepared fruit, melons and kiwis. Some of the smaller commodities, including nectarines, cherries and mangoes also had high growth rates.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$655.3M	+8.8%	\$9.5B	+8.8%
Fresh prepared fruit	\$59.5M	+9.8%	\$859.7B	+16.9%
Berries	\$195.0M	+15.2%	\$3.2B	+13.3%
Grapes	\$89.0M	+11.4%	\$1.2B	+9.2%
Bananas	\$81.9M	+0.3%	\$1.1B	+2.0%
Apples	\$77.3M	+1.6%	\$988M	+1.0%
Melons	\$16.0M	+1.6%	\$302M	+12.5%
Pears	\$22.7M	-0.3%	\$277M	+1.7%
Oranges	\$17.8M	-0.7%	\$265M	+4.7%
Lemons	\$17.9M	+12.6%	\$233M	+7.3%
Kiwis	\$13.8M	+29.0%	\$166M	+36.3%
Nectarines	\$4.5M	+19.0%	\$159M	+10.7%
Cherries	\$5.9M	+48.3%	\$156M	+18.5%
Mangoes	\$6.7M	+0.6%	\$109M	+31.2%
Plums	\$6.9M	-2.6%	\$98M	+2.0%
Limes	\$4.8M	+8.5%	\$72M	+8.0%

Prepared fruit's double-digit dollar growth is supported by double-digit gains in volume. Berries, grapes and melons were other substantial commodities with pound growth.

Volume sales (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh fruit	337.3M	+4.7%	4.8B	+4.3%
Fresh prepared fruit	5.9M	+8.0%	86.3M	+11.6%
Berries	64.9M	+14.2%	1.1B	+9.3%
Grapes	16.1M	+9.7%	222.5M	+3.8%
Bananas	106.3M	+3.1%	1.4B	+2.6%
Apples	32.7M	-1.7%	416.0M	-1.9%
Melons	5.4M	+3.9%	107.3M	+10.7%
Pears	11.5M	-3.8%	141.9M	+0.5%
Oranges	9.4M	-2.5%	139.0M	+2.9%
Lemons	15.6M	+2.4%	214.2M	+1.4%
Kiwis	6.4M	+10.3%	88.4M	+13.7%
Nectarines	1.4M	+24.5%	63.0M	+0.9%
Cherries	1.3M	+56.4%	49.0M	+15.8%
Mangoes	4.2M	-4.7%	68.0M	+45.9%
Plums	3.4M	-10.2%	48.1M	-0.6%
Limes	6.7M	+7.6%	98.8M	+2.6%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 29, 2025

Commodity Performance — Vegetables

Prepared vegetables gained in November and the full-year view. However, sales were items such as parsnip, Brussels sprouts, broccoli and tomatoes decreased year-over-year in November. Several of these also declined 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	\$480.4M	+0.9%	\$6.1B	+1.2%
Fresh prepared veg	\$49.8M	+2.3%	\$593.4M	+3.3%
Parsnip	\$5.7M	-2.9%	\$56.2M	+7.7%
Brussel sprouts	\$3.4M	-3.9%	\$36.4M	-6.4%
Mushrooms	\$2.1M	+2.4%	\$25.8M	+1.8%
Peas	\$1.3M	+8.4%	\$17.3M	-0.6%
Onion	\$1.2M	+7.7%	\$15.2M	+22.9%
Kale	\$1.4M	+23.6%	\$14.9M	-0.6%
Broccoli	\$1.0M	-11.5%	\$14.3M	-5.7%
Salad vegetables	\$308.4M	+3.8%	\$4.6B	+4.9%
Cucumbers	\$46.4M	+5.6%	\$691.6M	+6.1%
Avocado	\$40.3M	+9.6%	\$547.9M	+11.2%
Fresh herbs	\$16.8M	+2.4%	\$233.5M	+1.6%
Spinach	\$14.1M	+2.7%	\$182.2M	-2.9%
Tomatoes	\$2.7M	-2.8%	\$43.4M	+0.4%
Peppers	\$1.5M	+7.0%	\$24.4M	-6.5%

Volume sales reflect an even greater mix of performances in both time periods, showing the impact of inflation and deflation. Unlike prepared fruit, prepared vegetables fell short of year-ago levels. Salad vegetables did gain in both the four- and 52-week periods.

Volume sales (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh vegetables	199.2M	-1.8%	2.6B	-2.4%
Fresh prepared veg	9.9M	-5.6%	119.5M	-3.7%
Parsnip	2.2M	+0.1%	27.0M	+12.4%
Brussel sprouts	971K	-6.4%	10.2M	-10.8%
Mushrooms	328K	-0.9%	4.1M	-2.3%
Peas	124K	-2.2%	1.7M	-6.8%
Onion	348K	+4.5%	4.3M	+16.0%
Kale	221K	+23.1%	2.5M	-1.2%
Broccoli	182K	-9.3%	2.5M	-10.9%
Salad vegetables	68.1M	+1.2%	1.0B	+2.7%
Cucumber	11.0M	+0.1%	162.7M	+1.2%
Avocado	12.0M	+2.8%	162.8M	+10.3%
Fresh herbs	630K	+6.7%	8.5M	+7.2%
Spinach	1.9M	+0.3%	25.6M	-2.2%
Celery	139K	-1.2%	2.2M	+2.2%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending November 29, 2025