

IFPA's U.S. Produce Retail Point of Sales Results

December 2025 | The four weeks ending 12/28/2025

Written by:
Anne-Marie Roerink | President | 210 Analytics



Promotions and Holiday Demand Delivered Growth

The split performance between fruit and vegetables continued in December. Fruit delivered solid gains in dollars, units and pounds, while heavier promotional investment in vegetables drove higher pound sales but left dollar and unit performance below year-ago levels.

WHAT'S NEW

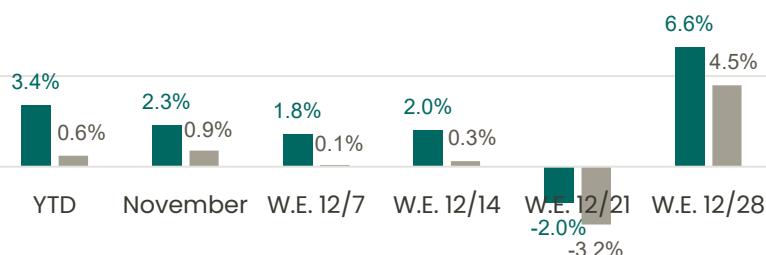
December IN REVIEW

Subdued Sentiment But Sold Economic Growth

- After declining from August through November, U.S. consumer sentiment rebounded modestly in December. At 52.9, the Index improved over November but remained well below December 2024 levels, as inflation and job market concerns continued to weigh on sentiment.
- The National Retail Federation (NRF) remained bullish on the holiday shopping season, projecting November-December holiday spending growth of 3.7% to 4.2% versus 2024. NRF pointed to cautious consumer sentiment alongside the K-shaped economy, continued underlying economic strength and growth in activity.
- This outlook aligns with the initial estimate of third-quarter real GDP growth, which rose 4.3% year-over-year, according to the U.S. Bureau of Economic Analysis, following 3.8% growth in the second quarter.

Total food and beverages at retail

■ Dollars vs. YA ■ Units vs. YA



- Retail continued to benefit from home-centric meals, with total food and beverage dollars up 1.9% in December and units increasing 0.3%.
- With Christmas shifting one day later relative to the third weekend of December, sales declined year-over-year in the week ending 12/21 but increased substantially during the actual holiday week.

MONTHLY SALES REVIEW



Strong Holiday Demand

Mirroring total store patterns, the third week of December saw sales declines as consumers delayed holiday stock-up trips until the final week of the month. The holiday week delivered a 5.1% increase in volume, even though sales from the final three days of the year will be captured in the January report.

Overall, December posted 1.6% growth in pounds, while heavier price investment tempered dollar growth to 0.6%.

	Dollars	\$ vs. YA	Lbs vs. YA
December 2025	\$6.8B	+0.6%	+1.6%
w.e. 12-07-25	\$1.63B	+1.1%	+2.0%
w.e. 12-14-25	\$1.66B	+1.7%	+1.8%
w.e. 12-21-25	\$1.77B	-3.2%	-2.0%
w.e. 12-28-25	\$1.73B	+3.0%	+5.1%

Sources:

Circana, Integrated Fresh, MULO+ | October is the four weeks ending 12/28/2025

POWER FACTS

STATE OF PRODUCE

Dec. 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.89 -0.8%	\$3.289B	+1.5%	+2.4%
Fresh Vegetables	\$1.96 -1.3%	\$3.388B	-0.5%	0.9%

Share of Dollars

\$6.78B +0.6%	\$788M +1.4%	\$495M +4.8%	\$698M +1.9%
Fresh Produce Department	Frozen Fruits and Vegetables	Shelf Stable Fruits	Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW \$)

\$ Absolute \$ gain vs. YA

The 5.7% increase in volume sales for berries led to a \$43.1 million increase in pound sales compared to December 2024. Inflation boosted lettuce to second place, with a dollar increase of \$22.8 million. All other commodities delivered growth through a combination of pound and price growth.

December was a huge month for melons, kiwis, sweet potatoes/yams and cherries that all grew volume by double digits compared with December 2024.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$43.1M	\$921M	+5.7%
Lettuce	+\$22.8M	\$271M	-2.4%
Melons	+\$13.4M	\$144M	+11.9%
Kiwis	+\$11.3M	\$53M	+23.3%
Bananas	+\$11.0M	\$284M	+0.7%
Yams	+\$9.7M	\$74M	+14.9%
Oranges	+\$7.6M	\$137M	+3.9%
Carrots	+\$6.6M	\$144M	+3.1%
Mandarins	+\$6.2M	\$190M	+7.9%
Cherries	+\$5.4M	\$35M	+19.0%



COMMODITY SPOTLIGHT

- U.S. retailers in the MULO+ universe sold \$835.9 million worth of mangoes in 2025.
- This is up from \$572.6 million in 2020, driven by the combination of inflation and demand, as platforms like Pinterest have reported dramatic increases in searches for mango-related recipes.
- Dollar sales grew 22.1% in 2025 and volume advanced 25.4%.
- Retailers carry some six different mango varieties, up slightly.
- About one-third of mango dollars are derived from promotions.

Inflation Insights

Retail total food and beverage price growth eased to 1.6% in December 2025, driven by declining produce, dairy and egg prices. The average price per unit in the Circana MULO+ universe was \$4.36, up 1.6% year-over-year. Beneath the slowing average, gradual price increases persist across packaged center-store items.

- Center-store prices averaged \$3.97, an increase of 3.5% year-over-year.
- Perishable prices averaged \$4.51 per unit, up a mere 0.2% versus December 2024.

Food & bev.	2019	2020	2021	2022	2023	2024	2025	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Dec. 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.29	\$4.25	\$4.30	\$4.31	\$4.32	\$4.36
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+2.6%	+3.2%	+2.7%	+3.0%	+1.8%	+1.6%

“The holidays continued to deliver in 2025, and that’s a key lesson to carry into 2026. Overall, 2025 was a solid year for fresh produce, with dollar sales up 2.7% and volume increasing 2.0%. However, the split performance between fruit and vegetables is concerning. Fruit dollar sales rose 5.5%, while vegetables declined 0.2%. Pounds grew 3.4% for fruit, but just 0.3% for vegetables. In 2026, the challenge will be driving more balanced growth by strengthening vegetable engagement, particularly among Gen Z and Millennials.”

– Joe Watson, IFPA’s VP of Retail, Foodservice and Wholesale

FUTURE OUTLOOK

A review of leading 2026 trend forecasts reveals broad consensus across several themes:

- Value, health and demographic shifts will remain the primary undercurrents shaping retail purchases. Value will become increasingly personalized through loyalty and AI-enabled tools.
- Fueled by MAHA, food as medicine is now mainstream, with consumers gravitating toward nutrient-dense options, animal-based proteins and fats, minimally processed foods and products positioned to support holistic and functional wellbeing. Foods and ingredients aimed at preventing or managing chronic disease are gaining traction.
- GLP-1 medications will have a growing impact on the food landscape, likely accelerating innovation focused on smaller portions, higher nutrient density and protein-forward solutions.
- Protein will remain a top dietary priority. Fiber is emerging as a second nutrient to watch in 2026, as consumers increasingly associate it with gut health, digestion and satiety.
- Influenced by social media, texture, nostalgia and multi-sensory experiences will play an increasingly important role in food and beverages.

IFPA Expands Global Retail Market Research

As IFPA continues to develop our global retail market research, we are thrilled to announce our newest commissioned data in partnership with Nielsen IQ. This data will be released monthly for markets in Mexico, Spain, Italy, and the United Kingdom. Each of these markets holds strategic value for understanding consumer trends and how consumers engage in markets outside of the United States.

For any questions, please reach out to Joe Watson, IFPA’s VP of Retail, Foodservice, and Wholesale at jwatson@freshproduce.com

METRICS

December 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$6.8B	+0.6%	+1.6%
Fresh fruit	\$3.3B	+1.5%	+2.4%
Berries	\$921M	+4.9%	+5.7%
Apples	\$379M	-1.7%	+0.8%
Grapes	\$364M	-3.6%	-3.4%
Bananas	\$284M	+4.0%	+0.7%
Avocados	\$220M	-11.2%	+10.6%
Mandarins	\$190M	+3.4%	+7.9%
Melons	\$144M	+10.2%	+11.9%
Oranges	\$137M	+5.9%	+3.9%
Mixed fruit	\$87M	-1.9%	-1.7%
Lemons	\$86M	+4.7%	+1.8%
	Dollars	\$ vs. YA	Lbs vs. YA
Fresh vegetables	\$3.4B	-0.5%	+0.9%
Potatoes	\$340M	-2.3%	+1.9%
Tomatoes	\$336M	-5.8%	-2.3%
Salad kits	\$292M	+0.6%	+0.3%
Lettuce	\$271M	+9.2%	-2.4%
Onions	\$258M	-2.4%	+0.2%
Peppers	\$231M	-6.3%	+1.9%
Carrots	\$144M	+4.8%	+3.1%
Cucumbers	\$144M	-1.2%	+3.2%
Broccoli	\$122M	-2.1%	-3.1%
Mushrooms	\$116M	-4.0%	-3.9%
December sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$9.4B	+5.7%	+0.1%
Refrigerated department, incl. dairy	\$8.7B	-3.9%	+0.8%*
Deli department	\$4.4B	+2.7%	+2.3%*
Bakery department	\$4.0B	+0.2%	-1.5%*
Seafood department	\$744M	-0.6%	-2.3%

Source: Circana Integrated Fresh, Total U.S., MULO+, fixed and random weight items combined into department views * = unit sales

For more information, please reference IFPA's full consumption data at
<https://www.freshproduce.com/resources/Commodities/>