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

July 2025 | The four weeks ending 7/27/2025

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INTERNATIONAL FRESH PRODUCE ASSOCIATION

Volume Growth for Vegetables Helps Deliver a Win for Produce in July

After several months of volume decline, fresh vegetable pound sales grew a modest 0.2%. Combined with the 1.4% growth in fresh fruit, the produce department delivered a solid July with $7.9 billion in sales. Demand growth included robust sales during the July Fourth holiday week as well as strong everyday demand.

WHAT'S NEW

JULY IN REVIEW

More Optimistic Consumers Open Their Wallets for July Fourth

- U.S. consumer sentiment continued to increase in July. The University of Michigan reported a significant rebound in June 2025 and further improvement to 61.7 in July. This marks the highest level since February 2025 on improved economic conditions and eased trade tensions.
- Consumers' July Fourth celebrations drove gains across departments, including fresh produce.
- More at-home meals, bargain hunting and efforts to minimize food waste have led to record grocery store visits. Up from 200 trips in 2021, American households now purchase groceries an average of 222 times annually, according to Circana. Year-over-year, trips grew 4.7%.
- Circana's shopper survey found that 96% of Americans remain concerned about today's food costs. This has led to 65% more closely watching their grocery spending, 30% stocking up on good deals and a growing popularity of private brands. Across food and beverages in Circana's MULO+ universe, private-label sales rose 6.8% in dollars and 2.2% in units over the past year — outperforming manufacturer-branded items.
- Consumers are also shifting purchases to everyday low-price formats. Supermarkets, known for their hi-lo pricing, generated 39.7% of all food and beverage dollars YTD, down from 44.0% in 2021. Channels that grew share include mass, club and e-commerce.
- Brick Meets Click/Mercatus reported that the online grocery market reached $9.8 billion in July, growing at an impressive 27.6% year-over-year, thanks to gains across delivery and pickup. Retail media is booming with CPGs pouring billions into data-driven platforms like Walmart Connect, Instacart and DoorDash.

MONTHLY SALES REVIEW

Friday Timing of Independence Day Boosted Weekly Sales to $2.2B

The Fourth of July fell on a Friday this year. Rather than stocking up on holiday-related fresh produce purchases the weekend before, consumers moved most dollars into the first week of July. This resulted in a substantial boost.

While the average everyday week generated about $1.9 billion in sales, the holiday week came in at $2.2 billion. Additionally, the holiday delivered above-average growth in both dollar and volume sales.

	Dollars	$ vs. YA	Lbs vs. YA
July 2025	**$7.9B**	**+3.1%**	**+1.0%**
W.E. 7-6-25	$2.2B	+3.8%	+1.2%
W.E. 7-13-25	$1.9B	+2.7%	+1.3%
W.E. 7-20-25	$1.9B	+2.3%	0.0%
W.E. 7-27-25	$1.9B	+3.6%	+1.3%

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Sources:
Circana, Integrated Fresh, MULO+ | September is the four weeks ending 7/27/2025

POWER FACTS

STATE OF PRODUCE

July 2025	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.58 | +4.4%	$4.4B	+5.9%	+1.4%
Fresh Vegetables	$1.99 | -0.6%	$3.3B	-0.4%	+0.2%

Share of Dollars

$7.9B | +3.1%
Fresh Produce Department

$759M | +3.0%
Frozen Fruits and Vegetables

$410M | -3.1%
Shelf Stable Fruits

$490M | +1.4%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

When regarding absolute dollar growth between July 2025 and July 2024, berries top the list with an additional $104 million in sales. Bananas were strong second, with an absolute dollar gain of $20 million. The impressive pound gains in citrus fruits place both mandarins and oranges on the growth list.

Sweet potatoes, plums and avocados dropped out on the top 10. Cherries, melons and cucumbers reappeared.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Berries	+$104.3M	$965B	+8.2%
Bananas	+$19.9M	$315M	+3.1%
Cherries	+$17.1M	$396M	+8.9%
Oranges	+$13.7M	$96M	+12.9%
Apples	+$13.6M	$327M	-4.4%
Melons	+$13.2M	$617M	-1.0%
Kiwis	+$12.4M	$53M	+29.1%
Mandarins	+$10.6M	$145M	+8.5%
Pineapples	+$10.3M	$119M	+4.1%
Cucumbers	+$9.9M	$170M	+4.8%

COMMODITY
SPOTLIGHT

- Fresh melons are a $4.1 billion category at retail.
- Watermelons are easily the biggest type, representing more than 70% of dollars.
- Conventional/large watermelons make up the bulk, but mini and yellow watermelons show that innovation can drive growth.
- The popularity of at-home entertaining is also driving growth for platters in both produce and deli.
- Cantaloupes are the second-largest seller, at nearly 20% of dollar sales.

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Sources:
Circana, Integrated Fresh, MULO+

Inflation Insights

In July 2025 (the four weeks ending 7/27/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at $4.34. This was unchanged from June 2025, but up 2.8% from July 2024. Center-store prices averaged $4.09, an increase of 2.8% over July 2024. Perishables averaged $4.28 per unit, which was an increase of 3.2% year-over-year.

Food & beverages	2019	2020	2021	2022	2023	2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
PPU	$3.13	$3.31	$3.49	$3.93	$4.17	$4.24	$4.24	$4.24	$4.30	$4.30	$4.36
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.5%	+1.9%	+2.2%	+2.9%	+2.7%

"The July results drive home that seasons and seasonal are pivotal in fresh produce retailing. Fourth of July is one of our biggest holidays and we knew that the Friday timing of the holiday impacted June sales. It is encouraging to see vegetable pound sales back in the black on strong holiday results. This is also a powerful reminder to celebrate all primary, secondary and self-invented holidays, like Summerween.

At the same time, cherries are a great reminder of the power of seasonal in produce retailing. Cherries delivered an additional $17 million in July sales to reach $396 million for the month. Peaches are another powerful reminder of produce's ability to drive sales with seasonal items.

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

FUTURE OUTLOOK

- Inflation, tariffs and other macro environment dynamics have reshaped grocery-shopping habits and consumer behavior in recent years. Savings ratings have fallen below COVID averages in recent quarters, and the Federal Reserve is expected to hold interest rates steady.
- Holidays, celebrations and entertaining remain the most important reasons for consumers to splurge a little, evidenced in growth during big national holidays, including July Fourth. Party platters are hot this summer and retailers are increasingly focused on easy, low-cost entertaining.
- Getting creative around more than the primary and secondary holidays, some brands have tapped into the cultural moment of "Summerween" and Gen Z and Millennials can't get enough of the creative campaigns and shareable experiences.
- Thinking ahead to Labor Day, "getting together with friends or family" is easily the most popular plan, followed by barbecue or having another type of special meal/celebration.

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

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Sources:
Circana, MULO+, total US

METRICS

July 2025 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$7.9B**	**+3.1%**	**+1.0%**
Fresh fruit	**$4.4B**	**+5.9%**	**+1.4%**
Berries	$965M	+12.1%	+8.2%
Melons	$617M	+2.2%	-1.0%
Cherries	$396M	+4.5%	+8.9%
Grapes	$375M	+0.1%	-16.0%
Apples	$327M	+4.3%	-4.4%
Bananas	$315M	+6.7%	+3.1%
Avocados	$286M	+0.9%	+6.6%
Peaches	$152M	+2.2%	+3.8%
Mandarins	$145M	+7.9%	+8.5%
Pineapples	$119M	+9.6%	+4.1%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$3.3B**	**-0.4%**	**+0.2%**
Tomatoes	$402M	+1.1%	+1.6%
Potatoes	$322M	+3.1%	+0.2%
Lettuce	$290M	-1.6%	-4.8%
Onions	$263M	-5.8%	-1.0%
Peppers	$243M	0.0%	+0.9%
Salad kits	$241M	-9.4%	-5.4%
Cucumbers	$170M	+6.2%	+4.8%
Carrots	$119M	+1.6%	-0.2%
Broccoli	$116M	+2.9%	+2.3%
Corn	$116M	-0.3%	+1.3%
July sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat department	$8.8B	+7.2%	+1.6%
Refrigerated department, incl. dairy	$7.8B	+4.8%	+0.8%*
Deli department	$4.5B	+2.0%	+1.8%*
Bakery department	$3.8B	0.0%	-1.5%*
Seafood department	$687M	+3.6%	+2.1%

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/

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