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

November 2025 | The four weeks ending 11/30/2025

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INTERNATIONAL FRESH PRODUCE ASSOCIATION

November Produce Sales Maintained Momentum with Fruit as the Growth Engine

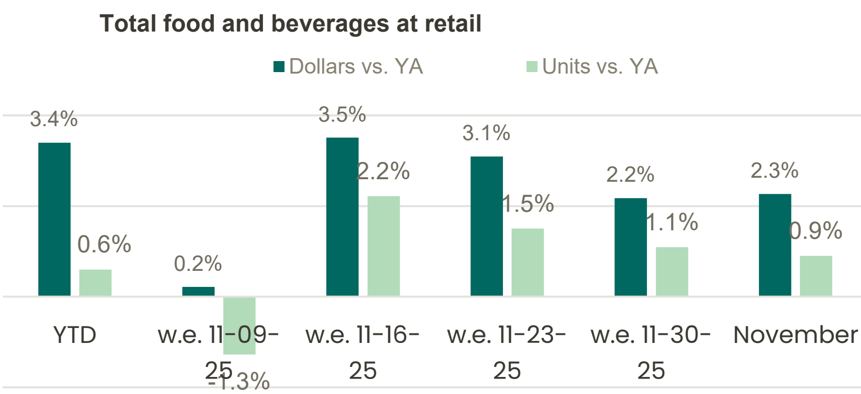
Retailers invested in price in November and consumers responded. Vegetable sales remained around year-ago levels, but fruit gained substantially. The Thanksgiving holiday delivered with dollar, unit and volume gains.

WHAT'S NEW

November IN REVIEW

The Government Shutdown Dominated Headlines

- The longest U.S. federal government shutdown in history ended after 43 days, extending last year’s spending levels for most of the government through the end of January and funding some agencies, including SNAP, through September 2026.
- A November 14 executive order exempted more than 200 agricultural and food inputs from reciprocal tariffs, including beef, coffee, cocoa, tropical fruits and certain fertilizers.
- Consumer sentiment remained subdued. At 51.0, the November University of Michigan Index marked the second-lowest reading on record, just above the June 2022 low of 50.0, as consumers continued to express concern over high prices and weakening incomes.
- Restaurant visits continued to trail 2024 levels in November, according to Circana. November transactions fell 3% YOY versus 2% for the full year. At the same time, retail food and beverage volume returned to positive territory after two months of year-over-year declines. The first week’s soft volume was more than offset by stronger performances in the remaining weeks. The Thanksgiving holiday week delivered both dollar and unit gains.



MONTHLY SALES REVIEW

Strong Thanksgiving Holiday Demand

Dollar and volume sales were flat-to-down during the first week of November, but strengthened throughout the month. The second and last week reflect robust volume gains. As illustrated clearly by the final week’s gap between dollar gains (+0.1%) and pound gains (+1.5%), retailers invested in price and consumers leaned into sales promotions to balance their budgets. Merchandised dollars increased 5.7% compared to November 2024, reaching 30.9% of total dollar sales.

	Dollars	$ vs. YA	Lbs vs. YA
November 2025	**$7.0B**	**0.0%**	**+1.1%**
W.E. 11-9-25	$1.7B	-0.9%	+0.2%
W.E. 11-16-25	$1.7B	+0.7%	+1.9%
W.E. 11-23-25	$1.8B	+0.3%	+0.9%
W.E. 11-30-25	$1.8B	+0.1%	+1.5%

Sources:
Circana, Integrated Fresh, MULO+ | October is the four weeks ending 11/30/2025

POWER FACTS

STATE OF PRODUCE

Nov. 2025	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.85 | -1.2%	$3.3B	+0.7%	+1.9%
Fresh Vegetables	$1.83 | -1.1%	$3.6B	-0.7%	0.4%

Share of Dollars

$7.0B | +0.0%
Fresh Produce Department

$809M | +1.4%
Frozen Fruits and Vegetables

$578M | +5.1%
Shelf Stable Fruits

$814M | +5.5%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

With dollars and volume down, berries did not make the top 10 list reflecting absolute dollar growth. This list was topped by lettuce, bananas and kiwis. All but lettuce grew dollars and volume, with double-digit volume growth for kiwis, mandarins and cherries. The viral trend around sweet potatoes continued to fuel sales and kiwis are also enjoying a budding viral moment, specifically mini kiwis, also known as kiwi berries or baby kiwis.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Lettuce	**+$24.1M**	**$272M**	**-1.0%**
Bananas	+$17.7M	$300M	+0.9%
Kiwis	+$17.0M	$61M	+33.5%
Oranges	+$11.7M	$113M	+8.2%
Mandarins	+$11.0M	$177M	+10.2%
Melons	+$8.6M	$163M	+5.1%
Carrots	+$8.3M	$150M	+4.6%
Cherries	+$6.8M	$14M	+109.1%
Broccoli	+$6.5M	$127M	-2.6%
Sweet Potatoes	+$5.6M	$116M	+3.9%

COMMODITY
SPOTLIGHT

- U.S. retailers in the MULO+ universe sell $3.2 billion worth of peppers each year.
- Pepper sales are flat year-on-year due to deflationary conditions this year.
- Compared to three years ago, dollar sales have grown 8.1%.
- Volume sales increased 3.4% versus 2024 and are trending 19.2% ahead of 2021.
- This points to sustained growth for the pepper category.
- Stores carried an average of 23 pepper items per week.
- 22.5% of sales were promoted over the past year, up 8.7%.

Inflation Insights
In November 2025 (the four weeks ending 11/30/2025), the price per unit across all foods and beverages in the Circana MULO+ universe was $4.25, up 1.4% year-over-year.

Most departments posted modest price growth:
• Center-store prices averaged $3.90, an increase of 2.8% year-over-year.
• Perishables reached $4.39 per unit, up 0.4% versus November 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q3 2024	Q4 2024	Q2 2025	Q3 2025	Nov 2025
PPU	$3.13	$3.31	$3.49	$3.93	$4.17	$4.24	$4.24	$4.25	$4.30	$4.31	$4.25
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+2.3%	+3.2%	+2.7%	+3.0%	+1.4%

"Thanksgiving is a big one for our industry and it's good to see it deliver yet another year of record sales. The research shows that holidays, special occasions and entertaining are the biggest reasons for consumers to spend a little extra, and that's exactly what we saw play out in the month of November. Consumer sentiment is cautious and restaurant spending is down, but consumers still prioritize the all-important family traditions and recipes."

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

FUTURE OUTLOOK

- 2026 marks the beginning of a transition toward Gen X and Millennial economic dominance after decades of a Boomer-led marketplace. Though Gen X is the smallest generation, its household size and income levels make it a high-value consumer group in produce spending.
- Circana research shows GLP-1 medication use is likely to continue rising through the end of the decade. Individuals using GLP-1 medications now account for an estimated 10%-14% of the population, with new patient prescriptions up 16%, which is an additional 2.9 million scripts.
- Weight management remains the top health goal, rising 42 points over last year. Users are more likely to be Gen X and higher-income households.
- GLP-1 users focus more on products higher in protein, fiber and healthy fats, while reducing purchases of items high in carbohydrates and sugar. Despite shifts in category mix, overall CPG spending among GLP-1 users continues to outpace that of non-users.

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

Sources:
Circana, MULO+, total US

METRICS

November 2025 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$7.0B**	**+0.0%**	**+1.1%**
Fresh fruit	**$3.3B**	**+0.7%**	**+1.9%**
Berries	$873M	-0.8%	-3.9%
Apples	$417M	-0.7%	+0.7%
Grapes	$406M	-1.3%	+3.0%
Bananas	$300M	+6.2%	+0.9%
Avocados	$223M	-9.9%	+11.9%
Mandarins	$177M	+6.6%	+10.2%
Melons	$163M	+5.6%	+5.1%
Oranges	$113M	+11.5%	+8.2%
Lemons	$87M	+4.2%	+1.1%
Pineapples	$87M	-5.5%	-11.6%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$3.6B**	**-0.7%**	**+0.4%**
Potatoes	$377M	-2.8%	+1.3%
Tomatoes	$326M	-4.9%	-1.3%
Salad kits	$300M	+1.5%	+0.1%
Onions	$285M	-2.3%	-2.0%
Lettuce	$272M	+9.7%	-1.0%
Peppers	$227M	-6.8%	+3.3%
Carrots	$150M	+5.9%	+4.6%
Cucumbers	$142M	-6.5%	-1.3%
Broccoli	$127M	+5.4%	-2.6%
Mushrooms	$118M	-4.5%	-3.6%
November sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat department	$9.2B	+6.0%	+2.9%
Refrigerated department, incl. dairy	$8.9B	-2.4%	+1.1%*
Deli department	$4.2B	+2.7%	+2.1%*
Bakery department	$4.0B	-0.2%	-1.3%*
Seafood department	$606M	+1.3%	-2.6%

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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