

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

January 2026 | The five weeks ending 2/1/2026

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Snow Storm Leads to Substantial Gains for Fresh Produce Sales

In an overall subdued month, the week ending January 25 delivered a substantial boost to grocery sales, including fresh fruit and vegetables, as consumers in many states prepared for days of snow, ice and record-low temperatures.

WHAT'S NEW

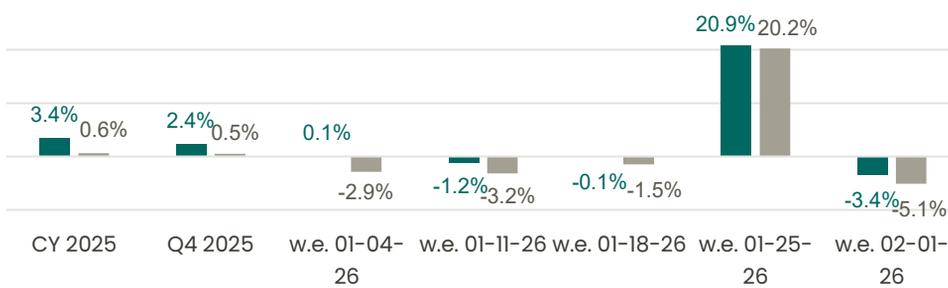
JANUARY IN REVIEW

Arctic blast Results in a 21% Sales Increase

- The University of Michigan's consumer sentiment index climbed to 56.4 in January 2026, from December's 52.9. While still low, this is the highest reading since August 2025, with growing confidence across all incomes and ages.
- Despite overall softness, premium product sales continued to grow. In part, this is driven by consumers prioritizing quality and meaning. Additionally, high-earners have had an outsized influence on food and overall spending. Nearly half (49%) of total consumer spending is driven by the top 10 percentile in household income, up from one-third in the 1990s.
- January's sales patterns were impacted by an arctic blast with snow, ice and extreme cold across much of the country. Many consumers stocked up ahead of potential power outages and road/travel disruptions leading to widespread out-of-stocks.

Total food and beverage dollar and unit sales at retail

■ Dollars vs. YA ■ Units vs. YA



While total food and beverage sales at retail were down in dollars and units during the first three weeks of January, the 20% sales spike during the week of the snow storm boosted the month's sales results far above January 2025 levels. Sales fell back below year-ago levels in the final week of January.

MONTHLY SALES REVIEW



Subdued Everyday Demand, But Strong Snow Storm Boost

The overall strong results for the month of January mask some everyday demand softness. Much like total foods and beverages, fresh produce unit sales were down or flat the first, third and fifth weeks of January. The week of the snow storm, January 25th, prompted a 14.5% increase in dollar sales and a 17.7% increase in unit sales year-over-year, which easily offset the softness in the other January weeks.

	Dollars	\$ vs. YA	Lbs vs. YA
January 2026	\$9.2B	+1.0%	+2.5%
W.E. 01-04-26	\$1.8B	-2.1%	-0.9%
W.E. 01-11-26	\$1.9B	+0.8%	+1.3%
W.E. 01-18-26	\$1.8B	-0.7%	+0.4%
W.E. 01-25-26	\$2.0B	+14.5%	+17.7%
W.E. 02-01-26	\$1.7B	-7.1%	-5.9%

POWER FACTS

STATE OF PRODUCE

Jan. 2026	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.90 -2.0%	\$4.6B	+1.6%	+3.6%
Fresh Vegetables	\$2.02 -0.9%	\$4.5B	+0.4%	+1.3%

Share of Dollars

\$9.2B +1.0%	\$1.1B +2.3%	\$603M +2.6%	\$930M +3.6%
Fresh Produce Department	Frozen Fruits and Vegetables	Shelf Stable Fruits	Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW \$)

🇺🇸 Absolute \$ gain vs. YA

Berries dominated sales and sales growth. The 8.8% increase in volume sales led to a \$44.4 million increase in pound sales compared to January 2025.

Sweet potatoes had been growing all year based on TikTok fame, but with a \$22.4 million increase versus January 2024, yams were the third most important commodity in absolute dollar growth. January also brought continued success for kiwis, garlic and tangerines.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$44.4M	\$1.3B	+8.8%
Grapes	+\$24.3M	\$540M	+8.1%
Sweet Potatoes	+\$22.4M	\$102M	+26.4%
Lettuce	+\$17.2M	\$347M	-2.7%
Melons	+\$16.4M	\$200M	+7.3%
Kiwis	+\$14.9M	\$71M	+20.6%
Bananas	+\$11.2M	\$383M	+1.3%
Tangerines	+\$9.4M	\$57M	+16.9%
Celery	+\$7.7M	\$126M	+0.5%
Garlic	+\$6.5M	\$69M	+8.9%



COMMODITY SPOTLIGHT

- Grapefruits generated \$239 million in sales in the past year, which was up 3.4% over year-ago levels.
- Grapefruits are enjoying demand growth with units up 2.4% year-over-year and volume 4.4%.
- Ruby, red or pink grapefruits are the largest seller, at \$175 million.
- Ruby grapefruits grew volume sales by 6.4% over the past year.
- Pummelos fall under grapefruits and generated \$11.5 million in the past year., up 0.8%.
- The typical store carries about 5 varieties of grapefruits.

Inflation Insights

Retail total food and beverage price growth eased to 1.7% in January 2026. Many center-store aisles continued to show price growth acceleration in January. Price movements in the perimeter were mixed. The average price per unit in the Circana MULO+ universe was \$4.27.

- Center-store prices averaged \$4.01, an increase of 3.6% year-over-year.
- Perishable prices averaged \$4.32 per unit, down slightly, at -0.2% compared with January 2025.

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%



“Produce associates across the country and throughout the distribution chain pulled together to meet an 18% spike in demand as consumers prepared to hunker down during the Arctic blast that swept much of the nation.

They then had to gear up all over again just weeks later for Game Day and Valentine’s Day demand. Hats off to this incredible industry for consistently making the impossible happen.”

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

FUTURE OUTLOOK

- The newly-released 2025–2030 Dietary Guidelines for Americans delivered a significant update to federal nutrition policy. Key changes include guidance prioritizing nutrient-dense and balanced diets. The guidelines recommend higher protein targets and signal a shift from previous low-fat guidance toward healthy fats from whole food sources.
- Online grocery sales continued to accelerate in December and early January, signaling that grocery e-commerce is becoming an ingrained habit rather than an alternative channel.
- Retailers are expanding accessibility. For instance, Kroger rolled out on-demand grocery delivery nationwide through a partnership with Uber.
- Brick Meets Click found that 50% of online shoppers placed at least three orders during December, a new high level.
- At the same time, grocery retail media continues its growth with more digital advertising and engagement.

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

January 2026 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$9.2B	+1.0%	+2.5%
Fresh fruit	\$4.6B	+1.6%	+3.6%
Berries	\$1.3B	+3.6%	+8.8%
Grapes	\$540M	+4.7%	+8.1%
Apples	\$529M	-2.4%	+1.1%
Bananas	\$383M	+3.0%	+1.3%
Avocados	\$333M	-8.3%	+16.4%
Mandarins	\$246M	-5.3%	-4.3%
Oranges	\$218M	+1.4%	+7.8%
Melons	\$200M	+8.9%	+7.3%
Lemons	\$114M	+4.4%	+0.8%
Pineapples	\$112M	-1.8%	-6.9%
	Dollars	\$ vs. YA	Lbs vs. YA
Fresh vegetables	\$4.5B	+0.4%	+1.3%
Tomatoes	\$460M	-4.3%	-1.2%
Potatoes	\$431M	-0.4%	+1.6%
Salad kits	\$406M	-0.5%	+1.8%
Lettuce	\$347M	+5.2%	-2.7%
Onions	\$346M	-0.6%	+2.5%
Peppers	\$323M	-4.8%	+0.3%
Cucumbers	\$213M	+1.4%	+0.9%
Carrots	\$191M	+0.3%	-3.6%
Broccoli	\$171M	+1.5%	-1.3%
Mushrooms	\$147M	-4.4%	-4.8%
	Dollars	\$ vs. YA	Lbs vs. YA
January 2026 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department.	\$11.2B	+7.7%	+2.6%
Refrigerated department (dairy)	\$10.4B	-4.9%	+2.0%*
Deli department	\$5.3B	+3.0%	+2.4%*
Bakery department	\$4.6B	+2.1%	-0.3%*
Seafood department	\$857M	+3.4%	-0.6%

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/>