



# All-Around Growth for Fresh Produce, Led by Fruit

*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 highlights the major trends in the Spanish marketplace.*

## Spain Marketplace Review

- In March 2025, Spain's inflation rate was 2.2% year-over-year, which represents a decrease from the previous month's rate of 2.9%.
- The unemployment rate in Spain was 10.9% in March 2025, showing continued high levels of job seekers in an uncertain economy, according to Eurostat.
- Spain's Producer Price Index (PPI) increased 4.9% in March 2025. The PPI increase may indicate rising production costs, which could impact consumer prices and economic growth.

Source GDP and inflation: National Statistics Institute

## Sales Performance

The five-week period ending March 30, 2025 delivered \$1.3 billion in fresh fruit and vegetable sales for the Spanish retailers in the NielsenIQ universe. Fruit edged out vegetables as the larger seller in March, at \$661 million versus \$614 million for vegetables. Both areas had strong year-over-year growth that was far higher than the rate of increase for the full-year view.

| Dollar sales<br>(in USD) | Latest 4 weeks |                      | Latest 52 weeks |                      |
|--------------------------|----------------|----------------------|-----------------|----------------------|
|                          | Dollar sales   | Dollars vs. year ago | Dollar sales    | Dollars vs. year ago |
| Fresh fruit              | \$660.9M       | +19.1%               | \$6.45B         | +10.7%               |
| Fresh vegetables         | \$613.8M       | +12.3%               | \$5.87B         | +6.4%                |

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending March 30, 2025

## Commodity Performance – Fruit

The increase in fruit sales was driven by strong growth in banana, avocado, mandarin and kiwi sales. Smaller sellers showing strong growth include melons, lemons, mangoes, plums and papayas.

| Dollar sales<br>(in USD) | Latest 4 weeks  |                      | Latest 52 weeks |                      |
|--------------------------|-----------------|----------------------|-----------------|----------------------|
|                          | Dollar sales    | Dollars vs. year ago | Dollar sales    | Dollars vs. year ago |
| <b>Fresh fruit</b>       | <b>\$660.9M</b> | <b>+19.1%</b>        | <b>\$6.4B</b>   | <b>+10.7%</b>        |
| Bananas/plantains        | \$112.5M        | +29.5%               | \$968.2M        | +13.1%               |
| Apples                   | \$62.6M         | +7.3%                | \$524.7M        | +4.1%                |
| Oranges                  | \$59.0M         | +5.2%                | \$479.3M        | -6.3%                |
| Avocados                 | \$52.5M         | +20.2%               | \$467.4M        | +22.8%               |
| Kiwis                    | \$32.9M         | +26.0%               | \$383.1M        | +11.3%               |
| Mandarins                | \$57.1M         | +14.8%               | \$365.0M        | +10.7%               |
| Grapes                   | \$34.7M         | +31.9%               | \$356.9M        | +16.1%               |
| Melons                   | \$11.0M         | +18.3%               | \$309.6M        | +7.5%                |
| Pears                    | \$23.7M         | +14.1%               | \$208.6M        | +1.5%                |
| Lemon/limes              | \$15.9M         | +30.3%               | \$186.2M        | +6.1%                |
| Mangoes                  | \$12.6M         | +43.2%               | \$125.1M        | +17.4%               |
| Pineapple                | \$9.6M          | +5.1%                | \$97.2M         | +9.0%                |
| Plums                    | \$3.2M          | +10.8%               | \$70.4M         | +1.8%                |
| Papayas                  | \$4.6M          | +37.5%               | \$40.3M         | +11.6%               |
| Pomelos                  | \$1.2M          | +9.5%                | \$13.2M         | +5.2%                |

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending March 30, 2025

In the 52-week period, fruit sales grew by 10.7% year-on-year, with a big contribution by bananas and apples, the numbers one and two in dollar sales.

### Commodity Performance – Vegetables

All vegetable commodities tracked in the Nielsen IQ universe increased sales in March. Tomatoes and potatoes were easily the biggest sellers, featuring robust growth. Smaller sellers with high growth rates included peppers, mushrooms, leeks, broccoli, eggplant, cabbage and artichokes.

In the full-year view, potatoes also show robust growth, along with garlic and leeks. Onions are the only one of the top sellers that lost ground in the 52-week view.

| Dollar sales<br>(in USD) | Latest 4 weeks  |                      | Latest 52 weeks |                      |
|--------------------------|-----------------|----------------------|-----------------|----------------------|
|                          | Dollar sales    | Dollars vs. year ago | Dollar sales    | Dollars vs. year ago |
| <b>Fresh vegetables</b>  | <b>\$613.8M</b> | <b>+12.3%</b>        | <b>\$5.9B</b>   | <b>+6.4%</b>         |
| Tomatoes                 | \$96.4M         | +14.4%               | \$991.1M        | +3.8%                |
| Potatoes                 | \$94.8M         | +9.1%                | \$947.3M        | +10.8%               |
| Onions                   | \$54.3M         | +3.3%                | \$471.5M        | -2.7%                |
| Salads                   | \$37.3M         | +8.1%                | \$394.1M        | +3.2%                |
| Peppers                  | \$39.9M         | +16.2%               | \$350.1M        | +5.3%                |
| Mushrooms                | \$30.5M         | +11.3%               | \$288.3M        | +9.6%                |
| Carrots                  | \$20.5M         | +9.9%                | \$196.7M        | +2.7%                |
| Lettuce                  | \$15.7M         | +3.8%                | \$173.2M        | -1.5%                |
| Garlic                   | \$19.4M         | +21.4%               | \$165.0M        | +13.0%               |
| Cucumbers                | \$11.0M         | +15.4%               | \$127.7M        | +5.9%                |
| Leeks                    | \$13.5M         | +15.6%               | \$121.7M        | +13.8%               |
| Broccoli                 | \$10.0M         | +23.7%               | \$91.2M         | +7.9%                |
| Asparagus                | \$9.4M          | +7.6%                | \$89.8M         | +9.8%                |
| Eggplant                 | \$6.1M          | +11.2%               | \$63.0M         | +6.8%                |
| Cauliflower              | \$6.4M          | +15.5%               | \$58.0M         | +3.1%                |
| Cabbage                  | \$6.1M          | +20.3%               | \$51.1M         | +9.2%                |
| Artichokes               | \$8.9M          | +17.7%               | \$41.5M         | +8.7%                |

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending March 30, 2025