

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

May 2025 | The five weeks ending 6/1/2025

Written by:

Anne-Marie Roerink | President | 210 Analytics



Vegetable Pound Sales Remained Subdued in May 2025

Fruit sales continued to grow driven by ongoing strong demand for berries, grapes and citrus fruit. On the vegetable side, three out of the big four PLOT vegetables lost ground, including tomatoes, lettuce and onions. Only potatoes gained year-on-year.

WHAT'S NEW

MAY
IN REVIEW**More Grocery Trips, But Fewer Units in the Cart**

- In May 2025, consumer sentiment was unchanged from April's low 52.5 index, according to the University of Michigan. This ended four consecutive months of rapid declines. The university found an improvement in the expected business conditions, but this was offset by declines in current personal finances stemming from stagnating incomes throughout May. Overall, consumers remained concerned in their future outlook.
- Grocery trips set new records. Year-to-date, consumers have shopped for groceries an average of 62 times per household, up 4.3% from the same weeks in 2024, according to Circana.
- Consumers continued to purchase fewer items per trip, down 2.3%, per Circana. In some categories, like meat, volume rose faster than units, signaling a switch to larger pack sizes. This is mostly driven by higher-income households. In other cases, consumers balanced their grocery spending by skipping non-essentials, buying smaller pack sizes and purchasing what's on sale.
- Brick Meets Click expects online grocery sales to maintain an annual growth rate of 8.9% over the next five years, which is more than five times its in-store counterpart's projected 1.7%. The firm anticipates that online sales will make up 17% of all grocery sales by 2029.
- Despite consumer cost-consciousness in 2025, third-party delivery giants Uber, DoorDash and Instacart defied expectations with double-digit order growth. This results in continued blending of retail and restaurant foodservice.
- Total retail food and beverage sales for the week leading up to Mother's Day reached \$19 billion, up 3.1% and unit sales edged up 0.3%. Memorial Day, celebrated on Monday May 26th, generated slight unit growth of 0.3% year-over-year.

MONTHLY
SALES REVIEW**Mother's Day Week Shows the Highest Gains**

Pound sales hovered around year-ago levels all five of the May weeks. The week ending May 25th, which would have included most of the Memorial Day sales, was down the most (-0.9%). The week leading up to Mother's Day was up the most, at +1.0% on sales of \$1.93 billion. Fruit outperformed vegetables during all May weeks.

	Dollars	\$ vs. YA	Lbs vs. YA
May 2025	\$9.604B	+1.3%	+0.3%
W.E. 5-4-25	\$1.882B	+1.0%	+0.1%
W.E. 5-11-25	\$1.929B	+1.7%	+1.0%
W.E. 5-18-25	\$1.891B	+2.3%	+1.0%
W.E. 5-25-25	\$1.991B	+0.5%	-0.9%
W.E. 6-1-25	\$1.912B	+1.3%	+0.5%

POWER FACTS

STATE OF PRODUCE

May 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.69 +3.1%	\$5.3B	+4.5%	+1.4%
Fresh Vegetables	\$2.00 -1.2%	\$4.2B	-2.4%	-1.3%

Share of Dollars



TOP GROWTH COMMODITIES (NEW \$)

\$ Absolute \$ gain vs. YA

When regarding absolute dollar growth between May 2025 and May 2024, berries top the list with an additional \$104.6 million in sales. Apples were strong second, with an absolute dollar gain of \$33.2 million, though this was inflationary driven with pounds off by 0.7%. The impressive pound gains in mangoes, kiwis, grapes and oranges also landed these commodities in the top 10. Sweet potatoes remained in the top 10 but pineapple dropped back out after making a strong showing in April due to Easter-related sales.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$104.6M	\$1.4B	+1.0%
Apples	+\$33.2M	\$481M	-0.7%
Avocados	+\$23.5M	\$394M	+4.9%
Mangoes	+\$20.6M	\$111M	+19.0%
Kiwis	+\$18.0M	\$59.8M	+32.9%
Bananas	+\$17.1M	\$414M	+3.3%
Grapes	+\$15.9M	\$535M	+11.1%
Mandarins	+\$14.4M	\$275M	+9.7%
Oranges	+\$12.9M	\$180M	+10.8%
Sweet potatoes	+\$10.3M	\$76.7M	+7.5%



COMMODITY SPOTLIGHT

Fresh oranges generate \$1.6 billion in annual sales.

- Dollar sales increased 3.1% in the past year, with even stronger growth for units (+4.2%) and pounds (+6.3%).
- Navel oranges are, by far, the largest segment, at \$1.2 billion.
- Cara cara oranges are the second-largest and responsible for much of the growth in the orange category. Cara Caras grew 22.1% in dollars over the past year, along with 28.7% in units and 30.3% in volume.
- Blood oranges also grew by double-digits.

Inflation Insights

In May 2025 (the five weeks ending 6/1/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.38. This reflects an increase of 2.7% over May 2024. Center-store prices averaged \$4.08, an increase of 2.4% over May 2024.

Fresh food prices averaged \$4.29, which was an increase of 3.8% year-over-year. Eggs continued to have a substantial impact on the overall fresh perimeter and total store price points. On a per unit basis, eggs averaged \$6.33, which was down from \$7.12 in April, but reflects an increase of 46.7% versus May 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	May 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.24	\$4.24	\$4.30	\$4.30	\$4.38
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.5%	+1.9%	+2.2%	+2.9%	+2.7%



“The uptick in fresh produce sales during Mother’s Day week is promising for Father’s Day, which is traditionally a more grill-centric versus restaurant holiday. However, the ongoing sales pressure in vegetables is concerning. While the total fresh produce department continues to gain by means of fruit dollar and pound growth, vegetables are falling behind despite deflationary conditions. Timely promotional activity along with recipe ideation and cross merchandising hand-in-hand with offering high quality and shopper education are just some of the ways that may help drive greater vegetable purchases as we move into summer.”

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

FUTURE OUTLOOK

- The pause on several tariffs helped ease consumers’ concern over prices and availability of goods. Yet, consumers continue to spend cautiously. According to Circana, 69% of households expect tariffs to increase prices, while 28% expect little to no impact. The remaining 3% believe prices will decline.
- Americans expect to fly less but take more road trips this summer. This offers opportunity in road-trip and on-the-go foods. As is, Technomic reports that the percentage of consumers who consume meals in their cars has risen eight points since 2019 for limited-service breakfast items, five points for lunch and four points for snacks.
- Father’s Day as well as everyday/entertaining grilling occasions also remain substantial sales opportunities in June.

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

May 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$9.6B	+1.3%	+0.3%
Fresh fruit	\$5.3B	+4.5%	+1.4%
Berries	\$1.4B	+7.9%	+1.0%
Melons	\$550M	-2.1%	-5.4%
Grapes	\$535M	+3.1%	+11.1%
Apples	\$481M	+7.4%	-0.7%
Bananas	\$414M	+4.3%	+3.3%
Avocados	\$394M	+6.5%	+4.9%
Mandarins	\$275M	+5.5%	+9.7%
Oranges	\$180M	+7.7%	+10.8%
Cherries	\$160M	-25.5%	-40.9%
Pineapples	\$143M	+5.6%	-3.6%
	Dollars	\$ vs. YA	Lbs vs. YA
Fresh vegetables	\$4.2B	-2.4%	-1.3%
Tomatoes	\$497M	-3.1%	-1.0%
Potatoes	\$382M	-0.5%	+1.4%
Lettuce	\$342M	-6.5%	-5.0%
Onions	\$309M	-6.3%	-1.4%
Salad kits	\$309M	-7.6%	-4.8%
Peppers	\$307M	-0.2%	-0.6%
Cucumbers	\$221M	+3.3%	+0.8%
Broccoli	\$155M	+6.5%	+1.1%
Carrots	\$150M	-0.4%	+0.6%
Mushrooms	\$135M	-5.3%	-4.3%
May sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$10.6B	+6.1%	+2.0%
Refrigerated department, incl. dairy	\$9.8B	+8.7%	+0.4%*
Deli department	\$5.5B	+1.1%	-1.6%
Bakery department	\$4.7B	-1.5%	-2.8%*
Seafood department	\$832M	+0.2%	-2.0%

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/>