Four and 52 weeks ending July 13, 2025

Summer Drives Focus on Salad Vegetables

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 vegetable sales trends in Italy.

INTERNATIONAL FRESH PRODUCE ASSOCIATION

Italy — Marketplace Review

- The July 2025 annual inflation rate was unchanged from June, at 1.7%. This rate remains elevated from earlier in the year, according to Istat figures. Core inflation, which excludes energy and unprocessed food, was also unchanged at 2.0%.
- Inflation is expected to remain below 2% through 2025 and easing somewhat in 2026, supported by falling energy prices and moderated demand pressures. Food inflation continued to run above headline inflation, with grocery items increasing 3.4%-3.8% year-on-year.
- The unemployment rate dropped further in July, falling to 6.0% from 6.5% in May, while the economy added 13,000 jobs.
- The forecast for GDP growth remains modest, at 0.6% for 2025 and 0.8% for 2026, per the latest ISTAT outlook. Weak productivity gains and ongoing trade policy frictions are expected to weigh on output over the medium term.

Sales Performance — Dollars

Vegetable sales are accelerating in Italy. The four-week period ending mid-July (July 13th) generated $355 million in vegetable sales, which was up 5.1% year-over-year. This compares favorably to the 3.9% growth seen in June. As the second-largest commodity, the 19.4% increase in tomato sales delivered the biggest booth to the overall vegetable growth. Potatoes, mushrooms and asparagus pulled down the mid-July results.

In the 52-week view, vegetables generated $4.8 billion in the Nielsen IQ-measured universe of Italian retailers. This reflects a similar growth rate (+4.9%) as the four-week period. Tomatoes have been a strong performer all year, along with peppers and broccoli.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh vegetables	**$354.5M**	**+5.1%**	**$4.8B**	**+4.9%**
Salad	$99.2M	+1.5%	$1.2B	+1.4%
Tomatoes	$90.2M	+19.4%	$848.8M	+9.2%
Potatoes	$36.7M	-5.6%	$662.3M	+2.2%
Onions	$19.6M	+3.5%	$272.4M	-3.2%
Carrots	$17.9M	+0.1%	$257.8M	+0.1%
Mushrooms	$6.8M	-7.1%	$163.9M	+4.7%
Lettuce	$11.4M	+9.9	$132.6M	+3.9%
Peppers	$8.9M	+8.1%	$94.1M	+11.0%
Asparagus (green)	$1.3M	-18.6%	$88.6M	-1.8%
Broccoli	$2.1M	-1.1%	$88.3M	+13.1%

The smaller commodities show a much greater range of performances for the weeks ending mid-July. In part, this shows that variety is becoming more important as well as well the importance of seasonality. Cucumbers and eggplant, for instance, had substantial growth, whereas turnip, artichoke and rucola sales were down by double digits. This means the 52-week view provides a better view of true growth, which is promising for cucumbers and endive.

Continued	Latest 4 weeks		Latest 52 weeks	
Dollar sales (in USD)	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Artichokes	$93.9K	-17.7%	$44.5M	+4.8%
Celery	$2.4M	+11.0%	$39.5M	+10.9%
Cucumbers	$3.9M	+30.7%	$32.1M	+33.5%
Radishes	$1.4M	+8.0%	$15.4M	+12.6%
Rucola	$1.1M	-14.9%	$13.3M	-6.3%
Beets	$894K	+14.1%	$13.2M	+3.0%
Turnips	$208K	-26.1%	$11.6M	+5.1%
Eggplant	$923K	+14.6%	$9.8M	+8.0%
Leeks	$359K	-1.9%	$9.7M	+10.2%
Endive	$415K	+13.7%	$8.5M	+38.6%
Beans	$680K	-11.7%	$8.1M	-0.6%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending July 13, 2025

Sales Performance — Volume

Year-over-year volume sales show that the vegetable dollar growth is driven by the combination of inflation and demand growth. Overall, vegetable pounds grew 3.8% in the four weeks ending mid-July, boosted by strong tomato, onion and lettuce growth.

Volume (in kg)	Latest 4 weeks		Latest 52 weeks	
	Volume sales	Volume vs. year ago	Volume sales	Volume vs. year ago
Fresh vegetables	**82.9M**	**+3.8%**	**1.18B**	**+5.8%**
Salad	12.6M	+5.6%	147.3M	+2.2%
Tomatoes	19.2M	+10.6%	172.1M	+6.4%
Potatoes	20.7M	-1.0%	382.0M	+6.8%
Onions	6.9M	+4.0%	102.9M	+3.3%
Carrots	9.1M	+0.9%	132.0M	+4.6%
Mushrooms	931K	-10.2%	22.4M	+0.5%
Lettuce	2.1M	+41.5%	20.2M	+13.0%
Peppers	1.8M	+6.3%	18.3M	+9.8%
Asparagus (green)	224K	-17.5%	10.3M	-7.4%
Broccoli	560K	+5.1%	24.5M	+11.1%
Artichokes	9K	-42.5%	3.5M	+17.9%
Celery	543K	+9.1%	9.3M	+8.2%
Cucumbers	784K	+33.1%	5.5M	+36.1%
Radishes	248K	+11.6%	2.8M	+15.3%
Rucola	108K	-18.2%	1.3M	-10.4%
Beets	326K	+14.0%	4.8M	+3.9%
Turnips	27K	-21.7%	1.4M	+8.3%
Eggplant	283K	+11.5%	2.7M	-4.7%
Leeks	47K	-5.6%	1.4M	+15.4%
Endive	71K	+8.7%	1.5M	+26.5%
Beans	128K	-17.0%	1.5M	-0.4%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending July 13, 2025