



Fruit Inflation Drives Gains; Vegetable Deflation Pulls Down Sales in Mid-Summer

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 Mexican marketplace.

Methodology Review

- Nielsen IQ assembled the high-level trends in fresh fruit and vegetable sales in Mexico.
- In fruit, seven commodities are broken out as well.
- The reporting will continue to expand as more information becomes available.

Marketplace Review

- Mexico's headline inflation has eased more sharply. It was about 3.5% in July, down from 4.3% in June. In August, annual inflation ticked slightly higher to 3.6%, but remains well within the Banxico's target range of 2%-4%.
- Banxico did proceed with a rate cut of 25 basis points in August, bringing the policy rate down to 7.75%. Market expectations are pointing toward further, though modest cuts, aiming to support economic growth amid ongoing uncertainties. U.S. tariffs and other market forces may have a disruptive force on the supply chain and Mexican export.

Sales Performance

Sales during the four weeks between mid-June and mid-July were somewhat soft. The quad-week period generated \$137 million in fresh fruit sales in the Nielsen IQ measured universe of Mexican retailers. This was mostly unchanged compared with year-ago levels. Vegetable sales were slightly lower, at \$133 million. Additionally, sales fell 6.1% year-over-year. This is contrary to the patterns seen in the 52-week view that show robust dollar growth for both time periods.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$137.2M	-0.2%	\$1.72B	+6.5%
Fresh vegetables	\$132.9M	-6.1%	\$1.81B	+3.2%

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

Unit sales provide insight into the impact of inflation and deflation. While fruit's dollar sales were flat, units were down 7.7% in the quad week. To the contrary, vegetables increased unit sales by nearly 11% while dollars fell 6% — pointing to substantial deflation.

Unit sales (Transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Unit vs. year ago	Unit sales	Units vs. year ago
Fresh fruit	77.4M	-7.7%	931.2M	-2.5%
Fresh vegetables	94.3M	+10.6%	1.15B	+1.0%

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

Price per Unit

Fruit had 8.1% inflation in the quad week versus 9.3% in the full-year view. Vegetables moved from very slight inflation in the 52-week view to more than 15% deflation in the latest four weeks.

Price per unit	Latest 4 weeks		Latest 52 weeks	
	Price per unit	Change vs. YA	Price per unit	Change vs. YA
Fresh fruit	\$1.77	+8.1%	\$1.84	+9.3%
Fresh vegetables	\$1.41	-15.1%	\$1.57	+2.2%

Commodity Performance — Fruit Dollar Sales

At the commodity level, performances ranged widely. Pineapples experienced robust sales gains of 24.3% in the quad week, but others were down by double digits or unchanged from year ago levels. In the latest 52 weeks, more commodities experienced growth, with bananas as the biggest segment and gaining nearly 9% year-over-year. Mangoes had the highest growth rate of 10.4%.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$137.2M	-0.2%	\$1.72B	+6.5%
Bananas	\$23.0M	-2.7%	\$291.7M	+8.7%
Lemon	\$10.9M	-1.9%	\$148.4M	-3.4%
Grapes	\$10.7M	-17.6%	\$127.3M	+8.8%
Mangoes	\$12.2M	-0.2%	\$100.7M	+10.4%
Pineapples	\$5.9M	+24.3%	\$77.0M	+5.2%
Melon	\$6.2M	+7.2%	\$70.8M	+5.4%

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

Commodity Performance — Fruit Unit Sales

Fruit unit sales show the impact of inflation on fruit dollar sales. During the quad week the performances were all over the board. Grape unit sales more than halved from year-ago levels, whereas pineapple sales increased by more than 35%. The results are a little more stable in the 52-week view, though grapes also experienced double-digit declines there. Lemons and mangoes are the only fruits gaining in the full-year view.

Unit sales (transactions)	Latest 4 weeks		Latest 52 weeks	
	Unit sales	Dollars vs. year ago	Unit sales	Dollars vs. year ago
Fresh fruit	77.4M	-7.7%	931.2M	-2.5%
Bananas	16.6M	-0.4%	224.7M	-2.9%
Lemon	6.2M	-4.1%	77.0M	+1.2%
Grapes	3.2M	-53.0%	30.0M	-19.3%
Mangoes	7.7M	-1.7%	52.9M	+1.2%
Pineapples	3.8M	+35.4%	51.0M	-0.9%
Melon	4.5M	-1.2%	45.3M	-7.5%

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