



# Summer Fruits Drive Robust Growth for Spanish Retailers in July

*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

- The Spanish economy demonstrated stronger growth in the second quarter of 2025. GDP rose 0.7% quarter-on-quarter and 2.8% year-on-year, outperforming expectations. Real GDP growth is still projected to reach 2.6% in 2025, with a moderate slowdown to 2.0% anticipated in 2026.
- Spain's economic sentiment improved in July, with the index increasing to 104.3 from 102.1 in June as employment expectations strengthened and overall uncertainty eased.
- Inflation accelerated in July, with headline CPI rising to 2.7% year-on-year from 2.3% in June. Core inflation also edged up slightly to 2.3%, reflecting persistent underlying price pressures.
- The unemployment rate remained low at 10.3% in the second quarter of 2025, the lowest since early 2008.
- Updated July PPI figures were not available at the time of writing, but earlier data showed a 1.9% year-on-year increase in June, suggesting ongoing cost pressures for producers.

Source GDP and inflation: National Statistics Institute

## Sales Performance

The four-week period ending July 27, 2025 delivered nearly \$1.2 billion in fresh fruit and vegetable sales for the Spanish retailers in the NielsenIQ universe. Both fruit and vegetables generated tremendous dollar gains, with fruit edging out vegetables as the larger category and accomplishing a higher growth rate.

Dollar sales (in USD)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Fresh fruit	\$681.4M	+21.2%	\$7.0B	+13.6%
Fresh vegetables	\$483.4M	+10.0%	\$6.2B	+7.7%

Source: NielsenIQ, Global SnapShot, 4 and 52 weeks ending July 27, 2025

## Commodity Performance — Fruit

Fruit's strong performance was supported by growth in many commodities. Mandarins lost ground in the quad week, but all others grew sales by high single-digit or double-digit rates. Bananas remained the biggest category, but melons, cherries and avocados had a very strong month.

Dollar sales (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>\$681.4M</b>	<b>+21.2%</b>	<b>\$7.0B</b>	<b>+13.6%</b>
Bananas/plantains	\$78.6M	+8.2%	\$1.0B	+12.9%
Apples	\$33.2M	+10.1%	\$550M	+3.4%
Oranges	\$30.3M	+12.2%	\$513M	-0.9%
Avocados	\$41.5M	+19.7%	\$509M	+22.3%
Kiwis	\$35.9M	+26.7%	\$421M	+17.3%
Grapes	\$18.5M	+18.8%	\$394M	+23.2%
Mandarins	\$2.2M	-18.2%	\$370M	+4.9%
Melons	\$65.9M	+30.4%	\$351M	+17.0%

In the 52-week view, bananas were double the size of the number two category, apples. Performances ranged a bit more widely, with oranges flat-to-down and mandarins up just 5%.

Continued (USD dollar sales)	Latest 4 weeks		Latest 52 weeks	
	Dollar sales	Dollars vs. year ago	Dollar sales	Dollars vs. year ago
Pears	\$10.3M	+10.9%	\$222M	+6.9%
Lemon/limes	\$24.8M	+59.1%	\$217M	+26.3%
Cherries	\$63.9M	+27.0%	\$163M	+5.8%
Peaches	\$28.6M	+6.6%	\$142M	+12.1%
Mangoes	\$9.8M	+20.9%	\$139M	+26.5%
Nectarines	\$29.0M	+19.8%	\$120M	+9.1%
Pineapples	\$8.0M	+25.5%	\$102M	+11.4%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending July 27, 2025

### Commodity Performance – Vegetables

Commodity-level performances were a bit all over the board for vegetables. Tomatoes were easily the largest seller in the quad week and grew 15.5%. other commodities, including cauliflower and artichokes lost ground whereas yet others had mild dollar growth. The 52-week performance, that removes the variations from seasonal highs and lows, shows far less variation. Garlic and cucumbers were above average performance but most others had growth rates around the overall average of +7.7%.

Dollar sales (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>\$483.4M</b>	<b>+10.0%</b>	<b>\$6.2B</b>	<b>+7.7%</b>
Tomatoes	\$102.0M	+15.5%	\$1.0B	+8.9%
Potatoes	\$71.5M	+2.6%	\$985M	+8.7%
Onions	\$41.6M	+23.3%	\$507M	+3.0%
Salads	\$38.6M	+7.2%	\$419M	+5.9%
Peppers	\$31.0M	+12.1%	\$371M	+8.0%
Mushrooms	\$18.9M	+4.6%	\$299M	+6.4%
Carrots	\$15.1M	+7.1%	\$206M	+4.9%
Lettuce	\$15.6M	+5.6%	\$181M	+1.1%
Garlic	\$13.6M	+21.8%	\$181M	+15.6%
Cucumbers	\$16.7M	+24.3%	\$140M	+10.5%
Leeks	\$6.8M	+2.3%	\$125M	+9.5%
Broccoli	\$5.9M	+4.7%	\$95M	+6.8%
Asparagus	\$5.8M	+2.9%	\$92M	+5.6%
Eggplant	\$4.7M	+4.6%	\$65M	+6.6%
Cauliflower	\$3.0M	-11.8%	\$59M	-0.7%
Cabbage	\$2.3M	+2.7%	\$53M	+7.6%
Artichokes	\$134K	-21.5%	\$45M	+13.4%

Source: NielsenIQ, Global SnapShot, 5 and 52 weeks ending July 27, 2025