GLOBAL TRENDS UNLOCKED

Insights Powered by the IFPA Global Intelligence Engine

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GLOBAL INTELLIGENCE TEAM

International Fresh Produce Association

Maddie Rennardson
Coordinator, Global Intelligence

Rachel Blake
Manager, Global Intelligence

IFPA tracks consumer trends in key markets across the globe to help shape your strategy

Represents
40%
of global produce imports

Annual import

$80B+
fresh produce

$4.8B+
fresh floral

Cross-generational analysis:
Gen Z through Baby Boomers

Global mindset, local execution

GLOBAL CONSUMER DRIVERS

- Quality
- Value
- Support for community
- Safety
- Environmental responsibility

Local expressions
Unique definitions, priorities, and willingness to pay

Generational inevitability
Younger consumers are driving change everywhere

Business reality
One-size-fits-all strategies no longer work

5 CONSUMER TRENDS ACROSS MAJOR MARKETS

1. **"Local"** wins hearts everywhere, but "it's complicated"
2. **Sustainability** as market entry requirement – or premium feature
3. The **price stress-premium** complexity
4. The great **packaging** divide
5. Mapping **organic** success

1 "Local" wins hearts everywhere, but distance and commitment "is complicated"

WHAT QUALIFIES AS "LOCAL"

- Asia: same **country**
- Europe: same **region**
- United States: same **state**

Willingness to pay more for local ranges across markets from

63-80%

Gen Z consistency leads but generational gaps vary

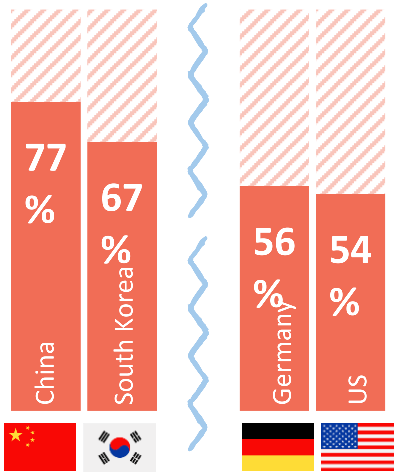
And yet…
Despite preference for local, produce import continues to grow

United States (2024)
$38B **+8%**

PLANTING SEEDS…
"Local" is a positioning strategy, but not necessarily a supply chain reality

2 Sustainability as market entry requirement → or premium feature

Markets are split on the importance of produce sustainability



Sharp contrast across categories

54-81% fresh produce

25-44% fresh floral

Age patterns flip by region

Asian Boomers > Western Boomers

more sustainable

PLANTING SEEDS...

Produce sustainability is table stakes in Asia, and a differentiator in West

3 The price stress-premium complexity

Stress about prices is inversely proportional to premium acceptance
(% who feel stressed by produce prices):

VS

Australia	53%
South Korea	51%
Germany	33%
China	28%

Lower premium acceptance (Australia, South Korea)

Higher premium acceptance (Germany, China)

Generational Paradox
Younger consumers are more price-stressed globally, but still drive premium trends

Behavioral Paradox
Consumers may be stressed about prices, but still pay for perceived value

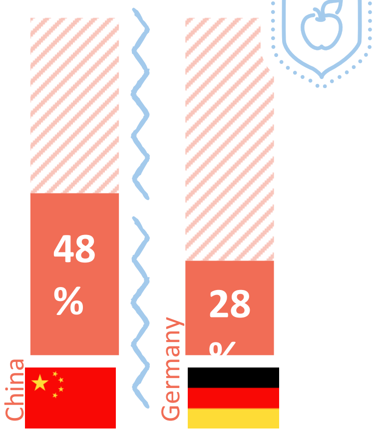
PLANTING SEEDS…
Consumers will pay more, but need to believe they're getting more; some markets are simply more receptive to premium positioning than others

4 The great packaging divide

Markets are split on

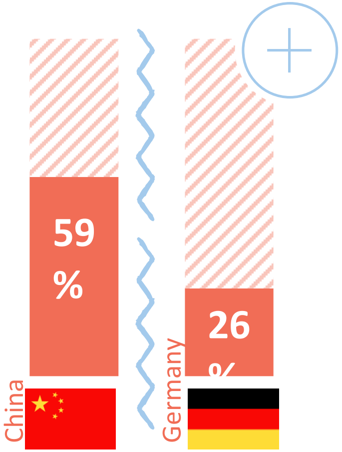
packaging's role in safety

(% who believe packaged produce is safer)



Willingness to

pay more for packaging



Universal generational trend

Gen Z accepts packaging everywhere

Future trajectory

Acceptance growing as populations age

PLANTING SEEDS…

You might need completely different product packaging strategies by market today, but expect convergence in the future

5 Mapping organic success

ORGANIC PURCHASE LIKELIHOOD

China	Germany	South Korea	Australia	Brazil	UK	USA
86%	79%	78%	74%	73%	71%	70%

LEADING GENERATION

China	Germany	South Korea	Australia	Brazil	UK	USA
Gen X	Gen Z, Baby Boomers	Gen Z, Baby Boomers	Millennial	Gen X	Gen Z	Millennial

PLANTING SEEDS…

Organic commands strong premiums where culturally accepted, but market entry strategies need to account for these massive regional differences

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Local expressions:
Different definitions, different priorities, different willingness to pay

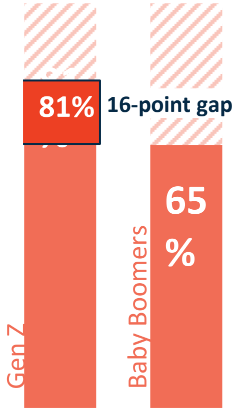
Generational inevitability:
Younger consumers driving change everywhere

Business reality:
Global strategies need local execution.

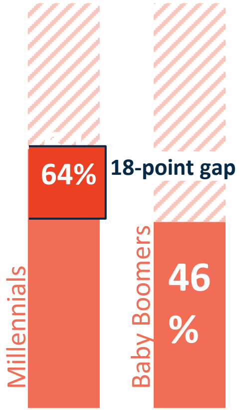
CASE STUDY: UNITED STATES

Where Global Trends Meet Local Reality

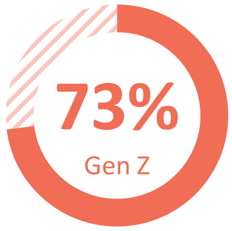
Local Preference by Generation



Sustainability Consideration Millennials

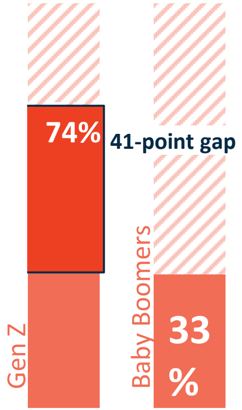


Price Stress Reality



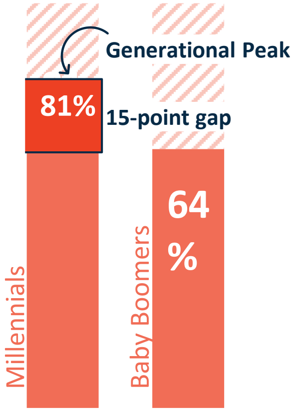
feel price-stressed despite driving premium trends

Willing to Buy Packaged Produce



Organic Leadership

(Likelihood)



What are members asking about?

How is inflation affecting produce and floral sales in the US?

What do Gen Z shoppers want from produce?

What are the top 10 vegetables and fruits in the U.S.?

What are the top fresh produce exports from Chile?

How many floral buyers are inspired by displays?

How are UK and US consumer trends different?

Global Intelligence Engine Overview

- Platform: Rubiklab
- Current data:
  – IFPA Consumer Tracker
  – Retail Sales (POS)
  – Production
  – Trade

IFPA CONSUMER TRACKER

- 7 countries
- 750 respondents per country
- Updated Annually
- Produce and floral
- Demographics
- Covers:
  - Eating behaviors
  - Sustainable behaviors/understanding technology
  - Shopper economics
  - Shopper psyche
  - Shopper motivations
  - Shopper health
  - Shopper experiences
  - Industry perception

→ ***Understand what is driving sales***

RETAIL SALES DATA- CIRCANA

- Covers USA overall and by region
- Produce and floral
- Updated Monthly
- Break downs:
    - Organics
    - Value Add (Fresh Cut)
- Parameters
    - Price
    - Value
    - Volume
    - Year over year growth

Up to date Sales performance

PRODUCTION- FAO

- Global
- Updated Annually
- Produce
- Covers:
  - 2019-2023
  - Volume
  - All categories reported by the country

Keep an eye on supply

Trade Data → *Global Movement of Produce*

- Top 20 Fruits and Vegetables
- USA hub:
  - Importers
  - Export destinations
  - Value and Volume monthly
- All exports globally
  - Value, volume (annual)
- Top 5 Exporters
  - Destination countries
  - Value, Volume

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EXPANDING OUR DATA ECOSYSTEM

Current Data sets

- Retail Sales Data
- Consumer Tracker
- Production Data
- Trade Data

Future Directions

- Retail Sales Data
  - Additional high value retail markets
- More Trade Data
  - Hub and spoke connections for additional key markets in Europe and Asia
- IFPA Resources
  - Food Safety, Government Relations, Supply Chain, PLU Resources
- Data from IFPA trusted sources
  - USDA, international regulatory bodies, UN FAO, etc.

DISCUSSION QUESTIONS

- What are your thoughts on the Global Intelligence Engine?
- What are your experiences with using AI?
- How are is your organization transitioning to AI?
- Where do you see AI being most valuable?
- What would you need to feel confident adopting AI-driven intelligence?
- What do you think the next generation of the Global Intelligence Engine should look like?

THANK YOU FOR JOINING

GLOBAL TRENDS UNLOCKED

HTTPS://WWW.FRESHPRODUCE.COM/RESOURCES/GLOBAL-INTELLIGENCE-ENGINE/

How is inflation affecting produce and floral sales in the US?

Inflation is pushing up produce and floral prices in the US, leading to higher dollar sales but flat or declining sales volumes. Fresh fruit dollar sales are up 6–7%, while fresh vegetable sales are flat, mostly due to price increases rather than more units sold. Organic produce is holding up slightly better in volume. Floral sales are also rising in dollars, but not in units. In short, consumers are paying more but not buying more.

Cited Sources: 'Circana, Integrated Fresh'

What motivates Gen Z consumers in the U.S. to buy fresh produce?

Gen Z in the U.S. buys fresh produce mainly for health, convenience, and authenticity. Over 80% say fruits and vegetables are very important, and they're especially drawn to "real fruit" claims and digital engagement like social media and in-store displays. Quick, healthy options and tech-driven value offers are key motivators for this group.

Cited Sources: 'IFPA Consumer Tracker', 'Circana, Integrated Fresh'

What are the top 10 vegetables and fruits in the U.S.?

Berries are the top-selling produce in the U.S. by dollar sales, followed by grapes, tomatoes, apples, and salads. Bananas lead in volume sold, but at a lower price point. Potatoes, melons, avocados, and lettuce also rank in the top 10, showing strong demand for both fruit and vegetable staples.

Cited Sources: 'Circana, Integrated Fresh'

What are the top fresh produce exports from Chile?

Pomegranates are Chile’s leading fresh produce export to the U.S., with 4.16M lbs shipped and $5.27M in revenue from late February to late June 2025. Mangoes and bananas are also exported, but at much lower volumes—49K lbs and 24K lbs, respectively—highlighting pomegranates’ dominance in Chile’s current export mix.

Cited Sources: Agtools

How many floral buyers are inspired by displays?

Store displays are the top purchase influencer for floral buyers, with 22–37% of consumers across major markets (including the US, UK, Germany, Brazil, Australia, and China) saying in-store displays inspired their flower purchases. This influence is consistent across all age groups and demographics, making store displays the most effective marketing lever for driving floral sales—well ahead of digital ads, coupons, or social media.

Cited Sources: 'IFPA Consumer Tracker'

How are UK and US consumer trends different?

UK shoppers are more focused on health and sustainability, with 70% willing to make eco-friendly changes and 67% prioritizing healthy food, while US consumers are more price-driven and less likely to change habits when budgets tighten. UK buyers prefer traditional supermarkets, while US shoppers rely more on mass merchandisers and warehouse clubs. Overall, UK consumers emphasize quality and values, while US shoppers focus on price and convenience.

Cited Sources: 'Circana, Integrated Fresh', 'IFPA Consumer Tracker'