

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

June 2025 | The four weeks ending 6/29/2025

Written by:

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Subdued June Fresh Produce Sales Bring First Negative Comps in Many Months in June 2025

The Friday Independence Day timing was a large factor in the negative comp sales for June. However, where fruit sales had been offsetting mild declines in vegetables, both areas had flat to down results in June. Berries, citrus fruit, potatoes and other commodities were notable exceptions.

WHAT'S NEW

JUNE
IN REVIEW**Consumer Sentiment Rebounds; Summer Routines Start Up**

- After plateauing in May, consumer sentiment improved in June 2025, according to the University of Michigan. The index increased to 60.7 points from 52.2 points in May. The improvement was seen across numerous facets of the economy, with expectations for personal finances and business conditions climbing about 20% or more. Despite June's gains, sentiment remains about 18% below December 2024.
- Several publicly-traded retail and foodservice companies added language on tariffs in the risk sections of their annual and quarterly reporting. Consumer sentiment relative to tariffs held steady in May after support fell for several months over concerns regarding their potential impact on prices, product availability and employment.
- The Consumer Price Index rose 2.4% year-over-year in May, according to federal data, mostly unchanged from April. Consumer food costs increased 2.9%, including 3.8% for restaurants. Already starting a higher price point, the above-average increases for foodservice means a continued retail-centric meal landscape for most consumers.
- Holidays remain a time to splurge a little. The week leading up to Father's Day (6/15) was the biggest of the four June weeks, at \$18.6 billion in total food and beverage spending.
- Grilling and cookouts are front and center between Memorial and Labor Day, with many opportunities for fresh produce to tap into what has become quite the season. This includes veggie kabobs, corn, watermelon and other summer fruit as well as portabellas. According to the Mushroom Council, portabella sales start gearing up post Mother's Day and consistently over index during all the summer weeks through Labor Day. Locally-sourced produce also gains momentum post Mother's Day.

MONTHLY
SALES REVIEW**Friday Independence Day Timing Hurts Comp Sales**

Taking a look at pound sales for each of the June weeks shows that the decline was solely driven by the last week of June. This was the week leading up to the July Fourth holiday that fell on a Friday this year. This likely means that most holiday-related items were purchased on a weekday trip rather than during the weekend before, with the Circana week endings falling on Sundays.

The other three weeks showed gains, albeit it more subdued ones.

	Dollars	\$ vs. YA	Lbs vs. YA
June 2025	\$7.9B	+2.0%	-0.1%
W.E. 6-8-25	\$2.0B	+1.7%	+0.9%
W.E. 6-15-25	\$2.0B	+1.8%	+0.5%
W.E. 6-22-25	\$1.9B	+2.3%	+0.2%
W.E. 6-29-25	\$2.0B	+2.2%	-2.0%

POWER FACTS

STATE OF PRODUCE

June 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.61 +5.2%	\$4.4B	+5.4%	+0.2%
Fresh Vegetables	\$1.98 -1.5%	\$3.3B	-2.2%	-0.7%

Share of Dollars



TOP GROWTH COMMODITIES (NEW \$)

\$ Absolute \$ gain vs. YA

When regarding absolute dollar growth between June 2025 and June 2024, berries top the list with an additional \$101 million in sales. Apples were strong second, with an absolute dollar gain of \$26.9 million, though this was inflationary driven with pound sales flat. The impressive pound gains in citrus fruits place both mandarins and oranges on the growth list

Sweet potatoes remained in the top 10 and pineapples also reappeared.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$101.1M	\$1.0B	+2.8%
Apples	+\$26.9M	\$353M	+0.5%
Mandarins	+\$19.6M	\$188M	+15.2%
Bananas	+\$17.6M	\$326M	+3.9%
Oranges	+\$13.6M	\$116M	+14.3%
Kiwi	+\$12.2M	\$55.6M	+24.3%
Plums	+\$9.9M	\$39.5M	+40.4%
Sweet potatoes	+\$9.7M	\$58.9M	+10.7%
Avocados	+\$9.0M	\$298M	+5.7%
Pineapples	+\$8.4M	\$121M	+1.7%



COMMODITY SPOTLIGHT

Fresh broccoli generates \$1.6 billion in annual sales.

- This is up from \$1.3 billion in 2020.
- Dollar sales increased 6.3% in the past year, with growth for units (+2.6%) and pounds (+3.0%) as well.
- Broccoli prices have been fairly stable, up 9% compared to three years ago.
- Fresh broccoli sales are far bigger than their frozen counterpart that generated \$658 million in the past year. Additionally frozen broccoli sales were flat in pounds and down slightly in dollar sales.

Inflation Insights

In June 2025 (the four weeks ending 6/29/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.34. This reflects an increase of 2.6% over June 2024.

- Center-store prices averaged \$4.09, an increase of 2.5% over June 2024.
- Fresh food prices averaged \$4.27, which was an increase of 3.4% 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 \$5.54, which was down from \$6.33 in May, but reflects an increase of 29.5% versus June 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.24	\$4.24	\$4.30	\$4.30	\$4.36
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.5%	+1.9%	+2.2%	+2.9%	+2.7%



“While seeing flat to down comp sales is not what I was hoping for, I want to stress that the final week of June was the main culprit. The Friday timing of the holiday without a doubt pushed a little more of July Fourth’ sales into the first week of July than it did last year. That said, the year-on-year pound decrease in vegetables is ongoing and seen across quite a few categories instead of just a handful. Quality, price, relevant promotions and eye-catching displays remain key. Displays don’t have to be large, but they have to be impactful to solidify planned purchases and inspire impromptu ones.”

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

FUTURE OUTLOOK

- According to the May Circana survey of primary grocery shoppers, consumers are expecting summer travel to be fairly similar to last year’s. If consumers choose to travel less (about one in 10) they cite travel costs and financial pressure in general as the main reasons.
- Consumers also expect summer cooking patterns to be similar to last year’s, hosting family and friends and doing cookouts several times during the 13 weeks between Memorial and Labor Day. One-third say new foods and recipes may prompt additional grilling occasions.
- Seven in 10 households who grill at least once during the summer tend to prepare their own meat/seafood items, whereas 17% buy grill-ready items. Consumers are slightly more likely to purchase pre-made sides, at 25%.

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

June 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$7.9B	+2.0%	-0.1%
Fresh fruit	\$4.4B	+5.4%	+0.2%
Berries	\$1.0B	+10.9%	+2.8%
Melons	\$568M	-2.1%	-4.2%
Grapes	\$378M	+0.1%	-13.0%
Apples	\$353M	+8.3%	+0.5%
Bananas	\$326M	+5.7%	+3.9%
Cherries	\$325M	-3.3%	-22.6%
Avocados	\$298M	+3.1%	+5.7%
Mandarins	\$188M	+11.6%	+15.2%
Pineapples	\$121M	+7.4%	+1.7%
Peaches	\$119M	+2.1%	+8.3%
Fresh vegetables	Dollars \$3.3B	\$ vs. YA -2.2%	Lbs vs. YA -0.7%
Tomatoes	\$403M	-1.2%	-0.2%
Potatoes	\$306M	+0.5%	+1.4%
Lettuce	\$277M	-7.6%	-5.2%
Onions	\$249M	-6.2%	-1.8%
Salad kits	\$247M	-7.9%	-5.1%
Peppers	\$241M	+0.1%	+1.5%
Cucumbers	\$173M	+3.7%	+3.8%
Carrots	\$118M	+0.7%	+0.6%
Broccoli	\$117M	+4.3%	+1.6%
Corn	\$105M	-7.2%	-7.8%
June sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$8.6B	+5.8%	+1.7%
Refrigerated department, incl. dairy	\$7.8B	+7.2%	+1.1%*
Deli department	\$4.5B	+1.1%	-1.4%
Bakery department	\$3.7B	-0.6%	-2.3%*
Seafood department	\$677M	+0.4%	-1.5%

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/>