

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

October 2025 | The five weeks ending 11/02/2025

Written by:

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## Promotions Helped Deliver Pound Gains, with Fruit Leading the Charge

*Retailers invested in price and consumers diverted fresh fruit and vegetable dollars to promotions. Fruit featured volume and dollar growth, whereas vegetable sales were flat. Pumpkins had a big month and citrus fruit is coming on strong.*

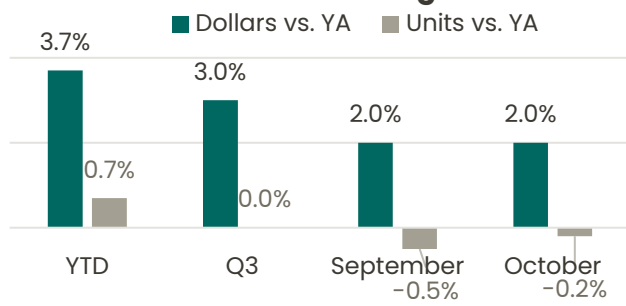
## WHAT'S NEW

October  
IN REVIEW

## The Government Shutdown Dominated Headlines

- The U.S. federal government shut down on October 1, 2025 after Congress failed to enact appropriations for FY2026. Around 900,000 federal workers were furloughed, with an additional 700,000 required to work without pay. Lasting the full month of October into November, the shutdown pressured household income in regions with heavy federal employment.
- The Supplemental Nutrition Assistance Program (SNAP), serving more than 40 million Americans, faced a funding shortfall. Many retailers, manufacturers and restaurants donated to food banks and offered free meals and fresh produce during the SNAP lapse.
- The shutdown weighed on consumer sentiment. The University of Michigan Index of Consumer Sentiment dropped 6.2% month-over-month in early November to 50.4, with the shutdown and inflation cited as key drivers. The decline was seen across age, income and political affiliation.

## Total food and beverages at retail



- Total retail food and beverage volume declined slightly in October, but has been on a flat-to-down trajectory for months as persistent headwinds, including low consumer confidence, tight economic conditions and job concerns weigh on demand. The shutdown does not appear to have had a substantial downward impact on retail food and beverage volume sales.

MONTHLY  
SALES REVIEW

## Gaps Between Dollars and Volume

Dollar and volume sales dipped during the first week of October, but strengthened throughout the month. The second and last week drove robust volume gains. As illustrated clearly by the final week's gap between dollar gains (+0.4%) and pound gains (+3.4%), retailers promoted heavily all month and consumers leaned into sales promotions to balance their budgets. Pumpkins also drove a big part of that gap. Merchandised dollars increased 11.7% compared to October 2024, reaching 31%.

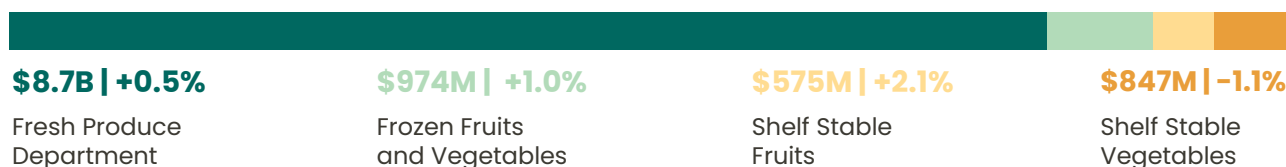
	Dollars	\$ vs. YA	Lbs vs. YA
<b>October 2025</b>	<b>\$8.7B</b>	<b>+0.5%</b>	<b>+1.2%</b>
W.E. 10-5-25	\$1.8B	-1.4%	-1.9%
W.E. 10-12-25	\$1.8B	+2.3%	+2.5%
W.E. 10-19-25	\$1.7B	+1.2%	+1.1%
W.E. 10-26-25	\$1.7B	+0.3%	+1.0%
W.E. 11-2-25	\$1.7B	+0.4%	+3.4%

## POWER FACTS

## STATE OF PRODUCE

Oct. 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.83   -1.3%	\$4.3B	+1.0%	+2.4%
Fresh Vegetables	\$1.78   -0.1%	\$4.3B	-0.1%	0.0%

## Share of Dollars



## TOP GROWTH COMMODITIES (NEW \$)

## \$ Absolute \$ gain vs. YA

For the first time in many months, berries did not make the top 10 list reflecting absolute dollar growth. This list was topped by oranges, kiwis and bananas. All but lettuce grew dollars and volume, with the strongest pound gains recorded by oranges and kiwis. Sweet potato sales are fueled by a viral trend featuring a ground beef bowl with cottage cheese, avocado and hot honey. Garlic is showing up strong in a few viral recipes including a 15-minute crispy smashed potato recipe.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Oranges	+\$28.7M	\$117M	+34.2%
Kiwis	+\$21.4M	\$81M	+28.9%
Bananas	+\$20.8M	\$383M	+0.6%
Salad-kits	+\$15.0M	\$400M	+1.1%
Sweet potatoes	+\$12.4M	\$87M	+10.1%
Lettuce	+\$11.4M	\$334M	-4.6%
Melons	+\$11.1M	\$292M	+5.6%
Grapes	+\$11.0M	\$594M	+1.1%
Mandarins	+\$10.7M	\$228M	+10.7%
Garlic	+\$7.4M	\$63M	+15.7%



## COMMODITY SPOTLIGHT

- U.S. retailers in the MULO+ universe sell \$623 million worth of garlic each year.
- Garlic sales have been trending up for years.
- Dollars gained 8.5% compared to last year, with unit gains of 7.8% and volume growth of 13.2%.
- Compared with three years ago, dollar sales have increased 27.7%, units 13.6% and volume 29.0%.
- This points to sustained growth.
- Stores carried an average of four to five garlic items per week.
- Garlic is rarely promoted. Only 12% of garlic sales are merchandised.

## Inflation Insights

In October 2025 (the five weeks ending 11/2/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.33, up 2.2% year-over-year. Most categories showed modest price growth, while categories like chocolate, coffee and meat experienced sharper increases.

- Center-store prices averaged \$4.08, an increase of 3.2% year-on-year.
- Perishables rose to \$4.35 per unit, which was an increase of 1.6% over October 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q3 2024	Q4 2024	Q2 2025	Q3 2025	Oct 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.24	\$4.30	\$4.36	\$4.36	\$4.33
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.9%	+2.2%	+2.7%	+2.9%	+2.2%



“Retailers are doing everything they can to support consumers in a challenging marketplace, from increasing promotions and donating to food banks to ensuring produce is as fresh as possible to protect shelf life and reduce waste. They are also sharing their knowledge and expertise, creating engaging in-store experiences, and offering meal, snack and beverage inspiration to help shoppers enjoy fresh produce across every eating occasion.”

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

## FUTURE OUTLOOK

- Economists estimate the shutdown could trim Q4 2025 GDP growth by up to 1 percentage point or more, with observable drag on foodservice consumption, especially among lower-income households and federal-dependent regions.
- The Conference Board is pointing to a K-shaped economy, with those earning more than \$200,000 annually feeling upbeat, fueling holiday, foodservice and retail spending. High-income households have made far fewer changes to retail and foodservice spending thus far. At this point, 47% of consumers plan to host or attend a Thanksgiving meal/celebration with family or friends and 27% plan to prepare a special meal just for themselves/their households.
- The average party size is expected to be between eight and nine people. 42% plan to travel for their Thanksgiving celebrations, with the majority driving (30%) versus flying (3%).
- Q4 success will require solutions for consumers across the affluence spectrum with relevant, timely promotions and omni-channel engagement.

## 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](mailto:jwatson@freshproduce.com)

## METRICS

October 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
<b>Fresh Fruits and Vegetables</b>	<b>\$8.7B</b>	<b>+0.5%</b>	<b>+1.2%</b>
<b>Fresh fruit</b>	<b>\$4.3B</b>	<b>+1.0%</b>	<b>+2.4%</b>
Berries	\$1.1B	0.0%	+0.8%
Grapes	\$594M	+1.9%	+1.1%
Apples	\$511M	-1.0%	-2.6%
Bananas	\$383M	+5.8%	+0.6%
Avocados	\$303M	-10.8%	+7.9%
Melons	\$292M	+4.0%	+5.6%
Mandarins	\$228M	+4.9%	+10.7%
Pineapples	\$119M	+3.3%	-6.3%
Oranges	\$117M	+32.7%	+34.2%
Mixed fruit	\$101M	+0.7%	-2.2%
	<b>Dollars</b>	<b>\$ vs. YA</b>	<b>Lbs vs. YA</b>
<b>Fresh vegetables</b>	<b>\$4.3B</b>	<b>-0.1%</b>	<b>0.0%</b>
Tomatoes	\$413M	-1.3%	-1.1%
Potatoes	\$403M	-1.2%	+0.3%
Salad kits	\$400M	+3.9%	+1.3%
Lettuce	\$334M	+3.5%	-4.6%
Onions	\$318M	-1.5%	-1.5%
Peppers	\$281M	-3.9%	+0.4%
Pumpkins	\$198M	-2.3%	+2.8%
Cucumbers	\$185M	-6.5%	-3.0%
Carrots	\$171M	+3.7%	+1.6%
Broccoli	\$147M	+2.3%	-5.2%
<b>October sales</b>	<b>\$ Sales</b>	<b>\$ vs. YA</b>	<b>Lbs vs. YA</b>
Meat department	\$10.7B	+6.2%	+1.1%
Refrigerated department, incl. dairy	\$10.0B	+1.0%	+1.6%*
Deli department	\$5.3B	+2.6%	+0.9%*
Bakery department	\$4.7B	+0.2%	-1.7%*
Seafood department	\$754M	+1.3%	-0.6%

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/>