



## **Late Easter Brings Substantial Growth to Fresh Produce Sales**

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*Potatoes, sweet potatoes and pineapples are just some examples of the holiday's powerhouses driving a good month for fresh produce.*

## WHAT'S NEW

APRIL  
IN REVIEW**Consumer Sentiment Drives Home-Centric Meal Landscape**

- The University of Michigan's Consumer Sentiment Index showed an April reading of 52.6, which reflects a 34.2% year-over-year decline. The university attributes this to paralyzing levels of uncertainty driven by inflation, tariff talk, stock market volatility and personal finances.
- Circana research finds a continued elevated level of at-home meal occasions driven by widespread consumer concern. Circana found that 74% of consumers are somewhat or very worried that there may be an economic recession in the U.S. within the next few months. Additionally, consumer support for tariffs declined sharply from a net +10 in January to -6 in March (total support minus total opposition). Consumers report being concerned about the potential impact on prices, availability and jobs.
- In response, 66% of consumers are watching their spending on groceries and other everyday items more closely and 44% of consumers have been trying to cut back on what they consider non-essentials.
- In an effort to curb perishable food waste and capitalize on sales promotions, consumers continued to purchase groceries more often with the most recent 52 weeks showing a 4.4% increase in trips year-over-year and the latest four weeks reflecting 2.3% growth. However, the average number of units per trip continues to be flat or down for most categories. The produce department is seeing similar patterns. Unchanged from last year, 99% purchased fresh produce at least once in the latest 52 weeks. Trips per buyer rose 3.2% to an average of 85 transactions. Additionally, shoppers spent more per buyer, at \$772 over the past year, up 3.7%.
- The April numbers are heavily impacted by the shift in Easter which fell substantially later in 2025 (April 20<sup>th</sup>) than in 2024 (March 31<sup>st</sup>). This shifted holiday volume from March to April (and from the first to the second quarter), but also impacted promotional levels, prices, etc.

MONTHLY  
SALES REVIEW**Easter Week Brings Substantial Dollar and Pound Increases**

The Easter impact is clearly demonstrated in the week-by-week view. Produce experienced dollar and pound increases all four April weeks, but gains were the highest the week leading up to the holiday and the holiday week itself. Pound sales increased by more than 9% during Easter week.

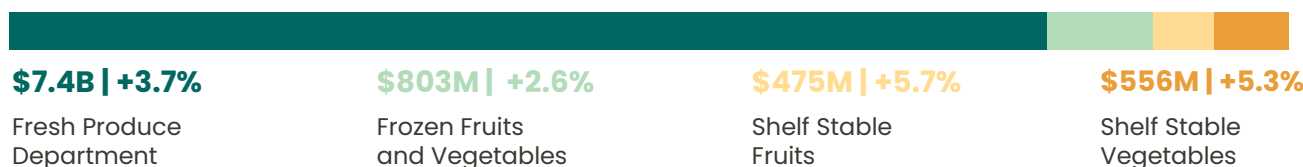
	Dollars	\$ vs. YA	Lbs vs. YA
<b>April 2025</b>	<b>\$7.4B</b>	<b>+3.7%</b>	<b>+4.7%</b>
W.E. 4-6-25	\$1.8B	+4.1%	+3.9%
W.E. 4-13-25	\$1.9B	+3.5%	+4.9%
W.E. 4-20-25	\$1.9B	+6.9%	+9.2%
W.E. 4-27-25	\$1.8B	+0.2%	+0.6%

## POWER FACTS

## STATE OF PRODUCE

April 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.82   +0.9%	\$3.9B	+7.2%	+6.3%
Fresh Vegetables	\$1.98   -2.8%	\$3.3B	-0.1%	+1.6%

## Share of Dollars



## TOP GROWTH COMMODITIES (NEW \$)

## \$ Absolute \$ gain vs. YA

When regarding absolute dollar growth, berries top the list with an additional \$95.0 million in sales compared to April 2024. Avocados were a very strong second, with an absolute dollar gain of \$25.7 million, though this was inflationary driven with pounds off by 2.2%.

After making a first appearance in January, mangoes remained in the top three in April with an additional \$20 million versus April 2024. Kiwis and cucumbers dropped out of the top 10, while sweet potatoes and pineapples moved in.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$95.0M	\$1.1B	+6.5%
Avocados	+\$25.7M	\$309M	-2.2%
Apples	+\$21.5M	\$407M	-2.4%
Melons	+\$20.6M	\$283M	+8.5%
Mangoes	+\$19.7M	\$80.8M	+20.8%
Potatoes	+\$17.4M	\$326M	+11.0%
Sweet potatoes	+\$14.9M	\$71.9M	+27.4%
Oranges	+\$13.3M	\$159M	+13.4%
Pineapples	+\$12.2M	\$117M	+8.0%
Grapes	+\$11.3M	\$441M	+15.4%



## COMMODITY SPOTLIGHT

The produce department generates \$1.3 billion in fresh pineapple sales, which does not include pineapple as part of mixed fruit trays or packages.

- Easter is an important holiday for pineapples with April generating \$117 million in fresh pineapple sales alone.
- This is 9% of annual sales.
- Pineapples had a strong April, with dollars increasing 11.6%.
- While inflation played a role, pineapple sales also benefited from a 4.2% increase in unit sales and 8.0% in pound sales.

## Inflation Insights

In April 2025 (the four weeks ending 4/27/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.32. This reflects an increase of 2.5% over April 2024 — very similar to the first quarter of 2025 average and increase. Center-store prices averaged \$4.01, an increase of 1.0% over April 2024. Importantly, the average price per unit is also impacted by the shift in Easter promotions that would have affected March in 2024, but April in 2025.

Fresh food prices averaged \$4.32, which was an increase of 4.8% 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 \$7.12, which was down from \$8.00 in March, but reflects an increase of 58.6% versus April 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Apr 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.24	\$4.24	\$4.30	\$4.30	\$4.32
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+1.5%	+1.9%	+2.2%	+2.9%	+2.5%



“Holidays continue to be a time when consumers are willing to spend a little more to celebrate togetherness and family traditions. Potatoes, pineapples and sweet potatoes’ contributions to new dollar sales show that those traditions are alive and well, despite ongoing economic hardship and concern.”

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

## FUTURE OUTLOOK

- While economic headwinds are real, the food industry is showing remarkable resilience. Holidays and celebrations remain a time when consumers are willing to spend a bit more, as illustrated by the robust spikes in Easter-related sales.
- May features Mother’s Day and the unofficial start of the grilling season in Memorial Day. Mother’s Day was traditionally one of the largest restaurant occasions, but celebrations have been more home-centric since 2020. Cross-merchandising displays facilitating planning, shopping and preparation are proven ways to drive sales, including online purchase suggestions and cross-merchandising.
- Tariff talks continue to evolve and while poorly understood by consumers are cause for concern nonetheless.

## 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

April 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
<b>Fresh Fruits and Vegetables</b>	<b>\$7.4B</b>	<b>+3.7%</b>	<b>+4.7%</b>
<b>Fresh fruit</b>	<b>\$3.9B</b>	<b>+7.2%</b>	<b>+6.3%</b>
Berries	\$1.1B	+9.4%	+6.5%
Grapes	\$441M	+2.6%	+15.4%
Apples	\$407M	+5.6%	-2.4%
Bananas	\$327M	+3.0%	+5.6%
Avocados	\$309M	+9.1%	-2.2%
Melons	\$283M	+7.8%	+8.5%
Mandarins	\$242M	+2.9%	+6.8%
Oranges	\$159M	+9.1%	+13.4%
Pineapple	\$117M	+11.6%	+8.0%
Mixed fruit	\$97M	+5.6%	+2.3%
<b>Fresh vegetables</b>	<b>Dollars \$3.4B</b>	<b>\$ vs. YA -0.1%</b>	<b>Lbs vs. YA +2.7%</b>
Tomatoes	\$386M	-2.4%	-0.9%
Potatoes	\$326M	+5.7%	+11.0%
Lettuce	\$265M	-6.5%	-6.2%
Onions	\$254M	-2.9%	-1.5%
Salad kits	\$249M	-8.1%	-5.2%
Peppers	\$245M	-0.5%	+1.1%
Cucumbers	\$176M	+2.2%	+3.9%
Carrots	\$134M	+3.2%	+4.1%
Broccoli	\$127M	+7.6%	+3.0%
Mushrooms	\$112M	-5.4%	-4.1%
<b>April sales</b>	<b>\$ Sales</b>	<b>\$ vs. YA</b>	<b>Lbs vs. YA</b>
Meat department	<b>\$8.4B</b>	<b>+9.8%</b>	<b>+7.9%</b>
Refrigerated department, incl. dairy	\$8.3B	+14.7%	+4.4%*
Deli department	\$4.3B	+1.9%	-1.7%
Bakery department	\$3.7B	+1.8%	-0.6%*
Seafood department	\$673M	+7.5%	+7.8%

**Sources:**

Circana, Integrated Fresh, MULO+

For more information, please reference IFPA's full consumption data at  
<https://www.freshproduce.com/resources/Commodities/>