

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

March 2025 | The four weeks ending 3/30/2025

Written by:

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Late Easter Puts More Pressure on Vegetable Comp Sales while Fruit Comps Roll in March

Berries, grapes, bananas and oranges had a monster month, driven gains for comp fruit sales, while vegetables absorbed the impact of Easter switching from March to April.

WHAT'S NEW

MARCH
IN REVIEW

Consumer Sentiment and Easter Timing Affect March Sales

- The University of Michigan's Consumer Sentiment Index for March 2025 declined to a reading of 57.0, marking a 11.9% month-over-month decline and a 28.2% year-over-year decrease from March 2024. The university attributes the decline to worsening expectations across various economic factors, including personal finances, labor markets, inflation, business conditions and stock markets.
- The March Consumer Price Index (CPI) eased slightly, mostly due to a substantial drop in gasoline prices. Food prices told a different story. Food-at-home prices increased 2.4% year-over-year, while food-away-from-home prices rose 3.8%.
- The paralyzing effects of economic uncertainty, including inflation and tariffs, are leading to continued elevated levels of at-home meal preparation. According to the Circana shopper survey, 80% of all meal occasions were prepared at home in March.
- Retail is not isolated from behavioral changes in response to economic pressure. Grocery money-saving measures are widespread. Four population groups are showing a greater propensity for seeking savings, according to Circana. These include U.S. Hispanic consumers, households with incomes of less than \$50,000 annually, rural households and consumers aged 55 and up. Importantly, households in the upper income brackets are also showing a slowdown in retail spending in recent months.
- The March numbers are heavily impacted by the shift in Easter which falls substantially later in 2025 (April 20th) than in 2024 (March 31st). This shifted holiday volume from March to April, but also impacts promotions and prices.

MONTHLY
SALES REVIEW

Easter Week Wreaks Havoc on Produce Comp Sales

The Easter impact is clearly demonstrated in the week-by-week view. While produce increased in dollars and pounds the first three of the four March weeks, the holiday weeks shows substantial decreases. The week ending March 30th resulted in a 5.1% decline year-on-year in pound sales, with most of the pressure coming from the vegetable side.

	Dollars	\$ vs. YA	Lbs vs. YA
March 2025	\$7.2B	+1.0%	+0.6%
W.E. 3-9-25	\$1.8B	+2.5%	+2.8%
W.E. 3-16-25	\$1.8B	+2.2%	+2.2%
W.E. 3-23-25	\$1.8B	+2.6%	+2.8%
W.E. 3-30-25	\$1.8B	-3.0%	-5.1%

POWER FACTS

STATE OF PRODUCE

March 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.85 +1.5%	\$3.8B	+6.7%	+5.1%
Fresh Vegetables	\$1.96 -0.3%	\$3.3B	-4.6%	-4.3%

Share of Dollars



TOP GROWTH COMMODITIES (NEW \$)

\$ Absolute \$ gain vs. YA

When regarding absolute dollar growth, berries top the list with an additional \$49.4 million in sales compared to March 2024. Avocados were a very strong second, with an absolute dollar gain of \$44.0 million, though this was inflationary driven with pounds off by 0.7%.

After making a first appearance in January, mangoes remained in the top three in March with an additional \$30.1 million versus March 2024. Kiwis also remained in the top 10, with an additional \$10.4 million in sales. After many months of high gains, cucumbers did not make the top 10 in March.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$49.4M	\$1.1B	+2.9%
Avocados	+\$44.0M	\$304M	-0.7%
Grapes	+\$32.6M	\$427M	+23.7%
Mangoes	+\$30.1M	\$76M	+97.5%
Apples	+\$24.1M	\$412M	-0.3%
Oranges	+\$15.5M	\$162M	+15.6%
Mandarins	+\$11.6M	\$243M	+6.9%
Tangerines	+\$11.3M	\$35M	+55.5%
Kiwis	+\$10.4M	\$38M	+34.6%
Broccoli	+\$7.1M	\$126M	+1.5%



COMMODITY SPOTLIGHT

The produce department generates \$10.5 billion in fresh salad and leafy green sales annually.

- Salad kits generated \$3.3 billion in annual sales, which is up 0.4% in dollars and 3.8% in units.
- The average store carries 25 different salad kits, often a combination of packer/shipper and private brands.
- Salad kits average just below \$4 per bag, at \$3.93, which reflects a slight decrease of 3.2% compared to the average price the year prior.
- Salad bowls sold in the deli department are also gaining.

Inflation Insights

In March 2025 (the four weeks ending 3/30/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.32. This reflects an increase of 3.3% over March 2024. This is very similar to the first quarter of 2025 average and increase. Importantly, the average price per unit is impacted by the shift in Easter. Retailers tend to run aggressive holiday promotions in advance of major holidays. The Easter shift resulted in a 6.3% decrease in merchandised dollars in March 2025 versus March 2024. Center-store prices averaged \$4.05, an increase of 3.5% over March 2024. Fresh food prices averaged \$4.31, which was an increase of 3.8% over March 2024. Eggs continued to have a substantial impact on the overall fresh perimeter and total store price points. On a per unit basis, eggs averaged \$8.00, which reflects an increase of 72.2% over March 2024.

Food & beverages	2019	2020	2021	2022	2023	2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Mar 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%	+3.3%



“We expected the shift in Easter timing to impact produce sales and it did. However, to see continued and robust gains in fresh fruit sales underscores that consumer demand is strong. While the ever-changing news of tariffs is impacting our industry and consumers alike, shoppers are prioritizing fresh produce in their non-stop budget balancing act.”

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

FUTURE OUTLOOK

- While March was negatively affected by the later timing of Easter, April sales will likely be boosted by the additional Easter volume, affecting many categories in fresh produce.
- The ongoing news about tariffs has already resulted in 30% of shoppers stockpiling some items out of concerns for rising prices or out-of-stocks. This includes pantry staples such as pasta, rice and cereal (62%), bottled/canned beverages (47%), coffee (35%) and items such as home care and cleaning products.
- While the meal landscape remains home-centric, 78% of consumers did consume at least one restaurant meal in March 2025. Delivery and takeout make up an ever-growing share of restaurant sales, providing opportunity for the produce department to complement restaurant dishes.

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

March 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$7.2B	+1.0%	+0.8%
Fresh fruit	\$3.8B	+6.7%	+5.1%
Berries	\$1.1B	+4.9%	+2.9%
Grapes	\$427M	+8.3%	+23.7%
Apples	\$412M	+6.2%	-0.3%
Bananas	\$316M	+1.1%	+4.9%
Avocados	\$304M	+16.9%	-0.7%
Mandarins	\$243M	+5.0%	+6.9%
Melons	\$208M	+3.2%	-0.5%
Oranges	\$162M	+10.6%	+15.6%
Pineapples	\$102M	-4.7%	-23.6%
Lemons	\$89M	+2.8%	+5.2%
	Dollars	\$ vs. YA	Lbs vs. YA
Fresh vegetables	\$3.3B	-4.6%	-4.3%
Tomatoes	\$372M	-3.9%	+1.5%
Potatoes	\$329M	-7.8%	-6.9%
Lettuce	\$256M	-5.8%	-6.7%
Onions	\$250M	-8.6%	-8.1%
Peppers	\$244M	-1.9%	+0.5%
Salad kits	\$244M	-8.0%	-4.9%
Cucumbers	\$169M	+0.4%	+4.6%
Carrots	\$138M	-4.7%	-4.1%
Broccoli	\$126M	+6.0%	+1.5%
Mushrooms	\$114M	-5.2%	-3.7%
March sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$8.1B	+2.2%	-4.3%
Refrigerated department, incl. dairy	\$8.4B	+9.5%	-2.1%*
Deli department	\$4.3B	+1.5%	-1.8%
Bakery department	\$3.6B	-3.8%	-3.8%*
Seafood department	\$679M	+1.9%	+1.4%

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