

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

February 2025 | The four weeks ending 3/2/2025

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INTERNATIONAL
**FRESH
PRODUCE**
ASSOCIATION



Fruit Brings Home the Win for the Produce Department in February

Despite some year-over-year inflation, fruit delivered robust increases in dollars, units and volume. Powerhouse berries generated an additional \$50 million in sales. Mangoes and kiwis also had an impressive February performance.

WHAT'S NEW

FEBRUARY
IN REVIEW

Consumer Sentiment Dips on Economic Worries

- The University of Michigan's Consumer Sentiment Index for February 2025 fell to 64.7, marking a significant decline of 9.8% from January and a 15.9% decrease from February 2024. It represents the lowest reading since late 2023. The decline was particularly notable in the Current Economic Conditions Index, which dropped 12.5% compared to January, indicating a pessimistic outlook among consumers due to concerns over tariffs and inflation expectations.
- A February 210 Analytics survey found that 81% of consumers say they are aware of the tariff negotiations, up substantially from 55% in early January. Self-reported understanding is mixed with two-thirds of consumers saying they have limited to no understanding of the tariffs.
- Yet, 79% of those consumers who are aware of tariffs are concerned about the impact on their personal financial situation. This includes concern over the cost of groceries, gasoline, etc. but also worries over employment impacts.
- In response, consumers continue to focus on sales promotions along with limiting the purchase of non-essential items. Lower-income consumers are the most likely to be concerned and implement changes.
- Consumers estimate that 79% of all meal occasions in a typical day are sourced from home. Lower-income households tend to purchase restaurant food much less often, with 24% not having purchased any restaurant food in February compared with 12% of higher-income households.

MONTHLY
SALES REVIEW

Valentine's Day Delivers Growth

Valentine's Day week delivered strong results for the produce department, with an increase in pound sales of 4.2%. The year-over-year gains tapered off towards the end of the month, though remained positive.

It is important to note that the Easter season had a much later start in 2025. In 2024, Lent started on Valentine's Day, which would have altered typical traditions and sales patterns. In 2025, Lent started on March 5th.

	Dollars	\$ vs. YA	Lbs vs. YA
February 2025	\$7.2B	+2.2%	+2.9%
W.E. 2-9-25	\$1.9B	+3.1%	+3.9%
W.E. 2-16-25	\$1.8B	+4.1%	+4.2%
W.E. 2-23-25	\$1.7B	+0.3%	+1.4%
W.E. 3-2-25	\$1.8B	+1.3%	+1.9%

POWER FACTS

STATE OF PRODUCE

February 2025	Price/Lb. vs. YA	\$ Sales	\$ vs. YA	Lbs. vs. YA
Fresh Fruits	\$1.95 +1.5%	\$3.8B	+5.9%	+4.4%
Fresh Vegetables	\$1.99 -2.7%	\$3.3B	-1.6%	+1.2%

Share of Dollars

\$7.2B +2.2%	\$827B +1.8%	\$473M +4.2%	\$625M +4.5%
Fresh Produce Department	Frozen Fruits and Vegetables	Shelf Stable Fruits	Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW \$)

🇺🇸 Absolute \$ gain vs. YA

When regarding absolute dollar growth, berries top the list with an additional \$50.1 million in sales compared to February 2024. Avocados were a very strong second, with an absolute dollar gain of \$48.7 million, though this was inflationary driven with pounds off by 2.1%. After making a first appearance in January, mangoes remained in the top three in February with an additional \$38 million versus February 2024. Kiwis also remained in the top 10, with an additional \$10 million in sales. For the first time in many months, cucumbers dropped out of the top 10 of absolute dollar growth drivers.

Product	\$ vs. YA	\$ sales vs. YA	Lbs sales vs. YA
Berries	+\$50.1M	\$1.1B	+6.9%
Avocados	+\$48.7M	\$306M	-2.1%
Mangoes	+\$38.2M	\$70.3M	+209.5%
Apples	+\$19.2M	\$416M	-0.7%
Oranges	+\$13.2M	\$161M	+11.4%
Grapes	+\$10.7M	\$408M	+10.2%
Kiwis	+\$9.6M	\$42.6M	+22.6%
Broccoli	+\$9.3M	\$129M	+0.1%
Tangerines	+\$9.3M	\$34.7M	+37.0%
Corn	+\$7.9M	\$37.7M	+41.3%



COMMODITY SPOTLIGHT

The produce department generates \$523 million in fresh kiwi sales annually.

- Kiwis are enjoying tremendous popularity with a 30.5% increase in dollar sales over the past year.
- Unit sales have increased 18.6% and volume grew by 20.7% year-over year.
- In comparison to three years ago, kiwi pound sales are up 21% — demonstrating sustained demand growth for several years.
- Retailers carry about 3 SKUs of kiwis on average and have increased their kiwi assortment over the past few years.

Inflation Insights

In February 2025 (the four weeks ending 3/2/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at \$4.33. This reflects an increase of 2.5% over February 2024. Center-store prices averaged \$4.01, an increase of 1.8% over February 2024. Fresh food prices averaged \$4.33, which was an increase of 4.0% over February 2024. The February price increase in perishables was substantially influenced by eggs. Egg prices continued to be highly elevated from historic levels, due to HPAI's ongoing impact on egg layers. USDA shared that egg prices per dozen dipped by \$1.85 on average, but did caution that prices could rise again due to demand for the Easter season.

Food & beverages	2019	2020	2021	2022	2023	2024	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Feb 2025
PPU	\$3.13	\$3.31	\$3.49	\$3.93	\$4.17	\$4.24	\$4.18	\$4.24	\$4.24	\$4.30	\$4.33
Change	+2.0%	+5.7%	+5.5%	+12.5%	+6.1%	+1.7%	+1.2%	+1.5%	+1.9%	+2.2%	+2.5%



“The very different timing of the Easter holiday in 2024 and 2025 impacts the February, March and April reporting — pushing holiday-related sales into the second quarter. Yet, holidays and special events remain a time when fresh produce shines. Super Bowl boosted the sales of avocados and March Madness has the ability to create additional at-home snacking and entertaining occasions.”

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

FUTURE OUTLOOK

Consumers and the food industry alike are pointing to uncertainty regarding inflation and tariffs in their short-term outlook. Uncertainty typically leads to more restraint spending by consumers, along with more focus on promotions and at-home meal occasions.

IFPA continues to seek exemptions for fruits and vegetables and provide data to the Administration on this key issue. IFPA's VP of U.S. Government Relations, Rebeckah Freeman Adcock addressed the many ways tariffs will impact the industry [in this recent story](#) from The Packer.

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

February 2025 sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	\$7.2B	+2.2%	+2.9%
Fresh fruit	\$3.8B	+5.9%	+4.4%
Berries	\$1.1B	+4.9%	+6.9%
Apples	\$416M	+4.8%	-0.7%
Grapes	\$408M	+2.7%	+10.2%
Bananas	\$306M	+0.1%	+3.8%
Avocados	\$306M	+18.9%	-2.1%
Mandarins	\$233M	+2.7%	+6.4%
Melons	\$170M	-6.0%	-12.8%
Oranges	\$161M	+8.9%	+11.4%
Pineapples	\$94M	+0.3%	-4.9%
Lemons	\$86M	+4.7%	+6.0%
	Dollars	\$ vs. YA	Lbs vs. YA
Fresh vegetables	\$3.3B	+5.6%	+4.6%
Tomatoes	\$366M	-4.7%	+1.5%
Potatoes	\$328M	+0.2%	+4.0%
Onions	\$259M	-0.3%	+5.4%
Peppers	\$252M	-0.2%	+1.0%
Lettuce	\$249M	-1.0%	-5.5%
Salad kits	\$244M	-6.0%	-5.8%
Cucumbers	\$164M	+1.5%	+3.3%
Carrots	\$139M	+1.4%	+1.7%
Broccoli	\$129M	+7.8%	+0.1%
Mushrooms	\$118M	-5.3%	-2.9%
February sales	\$ Sales	\$ vs. YA	Lbs vs. YA
Meat department	\$8.2B	+8.8%	+4.4%
Refrigerated department, incl. dairy	\$8.6B	+13.8%	+3.2%*
Deli department	\$4.3B	+1.5%	-1.9%
Bakery department	\$3.7B	-0.8%	-1.7%*
Seafood department	\$663M	-4.7%	-8.4%

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