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

August 2026 | The five weeks ending 8/30/2026

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INTERNATIONAL FRESH PRODUCE ASSOCIATION

Produce Sales Remained Under Pressure Throughout August

Dollar, unit and volume pressure continued in the five August weeks as financially-strained consumers pulled back on total food and beverages and produce was no exception. Additionally, fresh produce sales were impacted by the food safety outbreak, with continued double-digit declines in salads and leafy greens.

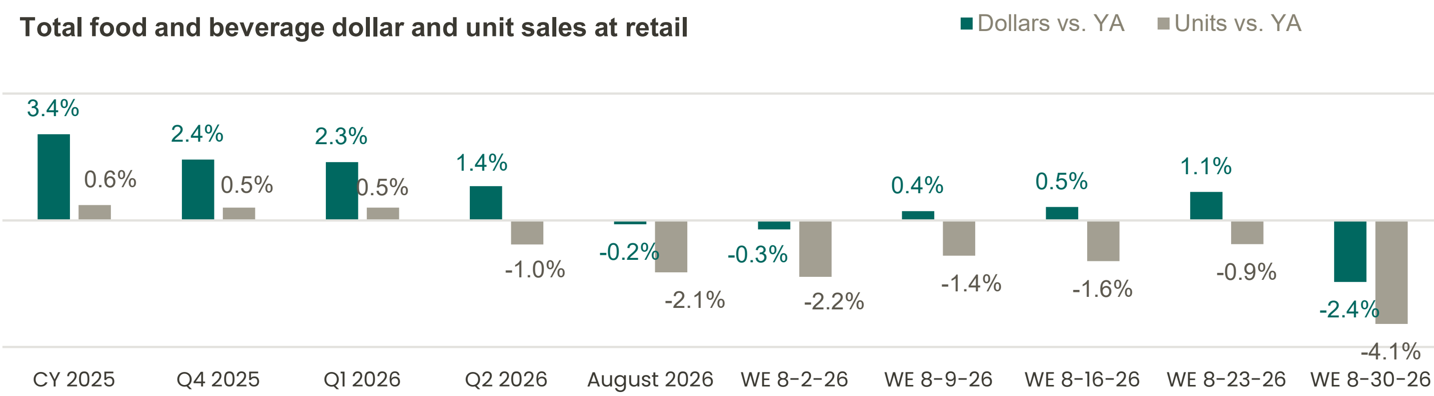
WHAT'S NEW

MONTH IN REVIEW

Continued Volume Struggles in August

- Consumer confidence lost ground in August, ending a two-month rebound. The University of Michigan Consumer Sentiment Index fell to 51.7, from 55.2 in July and 58.2 a year ago. The deterioration was particularly pronounced among older as well as lower- and middle-income consumers. The August CPI increased 3.4% year over year, while food prices were up 3.2%, with above-average increases for restaurant food, according to the BLS.
- Gasoline prices continued to pressure household budgets. The national average was around $4.07 per gallon at the end of August, with prices remaining above $4 throughout the month. Fuel prices are having a profound impact on grocery shopping as in-office attendance is climbing back though still well behind the 2019 levels.
- The labor market showed some improvement after a very weak July, but underlying concerns remain. August payrolls increased by 162,000 and unemployment held at 4.1%.
- The erosion of SNAP participation is becoming an increasingly important pressure point for food spending. May household enrollment fell to 19.9 million, down 11.5% year over year and the lowest level since 2019, reflecting a $1.0 billion reduction in benefits paid..
- Total retail food and beverage unit sales declined 2.1% during the five weeks ending August 30. Units were down by more than 2% year over year three out of the five weeks.

Total food and beverage dollar and unit sales at retail



MONTHLY SALES REVIEW

August Sales Experienced Declines in Dollars, Units and Pounds

Sales were down all August weeks, with volume declines ranging from -2.9% during the week ending August 23 to -8.0% the very next week. While much of the decline was driven by lacking salad and leafy greens sales, many produce commodities were feeling residual impact of the decline in fresh produce trips.

	Dollars	$ vs. YA	Lbs vs. YA
August 2026	**$9.1B**	**-6.0%**	**-5.3%**
w.e. 08-02-26	$1.8B	-6.7%	-5.8%
w.e. 08-09-26	$1.8B	-5.8%	-4.9%
w.e. 08-16-26	$1.8B	-6.2%	-5.0%
w.e. 08-23-26	$1.8B	-4.3%	-2.9%
w.e. 08-30-26	$1.8B	-6.9%	-8.0%

Sources:
Circana, Integrated Fresh, Total US MULO+ | August is the five weeks ending 8/30/2026

POWER FACTS

STATE OF PRODUCE

August 2026	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.64 | +1.0%	$5.0B	-5.2%	-6.1%
Fresh Vegetables	$2.02 | -2.8%	$4.0B	-6.9%	-4.2%

Share of Dollars

$9.1B | -6.0%
Fresh Produce Department

$1.0B | +6.1%
Frozen Fruits and Vegetables

$582M | +3.6%
Shelf Stable Fruits

$685M | +4.5%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

Demand growth propelled apples to the top spot in the absolute dollar growth rankings. Apple sales increased by $30 million year over year. Beans and cabbage were newcomers to the top 10, while kiwis and yams are showing staying power. Fruit dominated the top 10 during the early months of 2026, led by berries. In August, seven out of the 10 top growth commodities were vegetables. Five out of the top 10 enjoyed demand versus just inflation-driven growth, including apples, kiwis, yams, peppers and cabbage.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Apples	+$29.8M	$472M	+4.2%
Kiwis	+$29.0M	$103M	+32.7%
Sweet potatoes	+$27.7M	$101M	+36.3%
Grapes	+$14.3M	$542M	-1.8%
Onions	+$8.0M	$337M	-1.2%
Cucumbers	+$5.9M	$207M	-0.2%
Peppers	+$3.9M	$305M	+0.6%
Broccoli	+$3.2M	$146M	-7.1%
Cabbage	+$3.2M	$53M	+5.9%
Beans	+$3.1M	$60M	-1.3%

COMMODITY
SPOTLIGHT

- Fresh cabbage sales reached $596 million over the past year.
- Dollar sales increased by 2.0%, while pound sales grew by 2.6%.
- Green cabbage is the largest varietal, generating $447 million in sales over the past year.
- The next three varietals are red, Chinese and savoy cabbage, all three of which grew dollar and unit sales over the past year.
- Cabbage's price per pound at retail averaged $0.99 and retailers carry an average of five to six varieties of cabbage.

Sources:
Circana, Integrated Fresh, Total US MULO+

Inflation Insights

Retail price growth in Circana's MULO+ universe decelerated to 1.9% in August 2026, down from 2.3% in the second quarter of 2026. Price trends varied widely:

Center-store prices reached an average of $4.17 per unit in August, up 3.6% year over year.

- The average unit price across all perishable departments was $4.37, up 0.6% versus August 2025.
- With beef starting to lap last year's substantial price increases, overall meat department inflation moderated to just 0.5%, while inflation remained above average for fresh seafood. Dairy experienced deflation with lower egg, cheese and butter prices compared with August 2025.

Food & bev.	2019	2020	2021	2022	2023	2024	2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	July 2026
PPU	$3.13	$3.31	$3.49	$3.93	$4.17	$4.24	$4.29	$4.31	$4.32	$4.33	$4.39	$4.38
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+2.6%	+3.0%	+1.8%	+2.0%	+2.3%	+2.1%

FUTURE OUTLOOK

- GLP-1 adoption is becoming too large to treat as a niche consumer trend, with one in six Americans now using a GLP-1 medication. This share has doubled from 2024, with a profound impact on meal planning, shopping and preparation. GLP-1 users make more intentional food choices, eating smaller but more frequent meals and snacks, with a focus on high-protein, fiber-rich and nutrient-dense foods. For instance, whole milk and full-fat dairy have been gaining momentum alongside strong engagement with fresh meat and poultry.
- Nostalgia and mashups are dominating restaurant and meal trends, as more than half of American shoppers look for globally inspired, unique or fun new flavors. In mashups, restaurants are combining two cuisines into single menu items, such as cheeseburger tacos. Bowls play a prominent role in new menu development across retail and restaurant foodservice.
- Chartwells Higher Education's 2026 Fall Flavor Forecast found that Gen Z is moving faster than ever, looking for texture-rich, functional micro-meals and beverages while eating smaller but more frequent meals throughout the day. High-protein and fiber-rich items remain on the Gen Z menu.

For any questions, please reach out to Jessica Keller, IFPA's VP of Global Industry Relations at Jkeller@freshproduce.com

METRICS

August 2026 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$9.1B**	**-6.0%**	**-5.3%**
Fresh fruit	**$5.0B**	**-5.2%**	**-6.1%**
Berries	**$1.0B**	**-10.5%**	**-14.2%**
Melons	$626M	-6.8%	-8.7%
Grapes	$542M	+2.7%	-1.8%
Apples	$472M	+6.7%	+4.2%
Bananas	$378M	-3.8%	-1.0%
Avocados	$338M	+0.3%	+5.2%
Cherries	$202M	-23.2%	-37.1%
Mandarins	$188M	+0.2%	-0.4%
Peaches	$178M	-17.7%	-22.0%
Pineapples	$120M	-7.7%	-2.0%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$4.0B**	**-6.9%**	**-4.2%**
Tomatoes	$450M	-1.7%	-4.8%
Potatoes	$410M	0.0%	+0.1%
Onions	$337M	+2.4%	-1.2%
Lettuce	$310M	-16.2%	-19.3%
Peppers	$305M	+1.3%	+0.6%
Salad-kits	$268M	-37.6%	-36.6%
Cucumbers	$207M	+2.9%	-0.2%
Carrots	$153M	-1.6%	-3.3%
Broccoli	$146M	+2.2%	-7.1%
Mushrooms	$118M	-7.5%	-9.0%
August 2026 sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat dpt.	$10.6B	-1.8%	-2.3%
Refrigerated dpt.	$9.8B	-2.4%	0.0%*
Deli dpt.	$5.4B	-0.9%	-1.1%*
Bakery	$4.5B	-2.5%	-4.3%*
Seafood dpt.	$840M	+1.0%	-1.9%

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/

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Sources:

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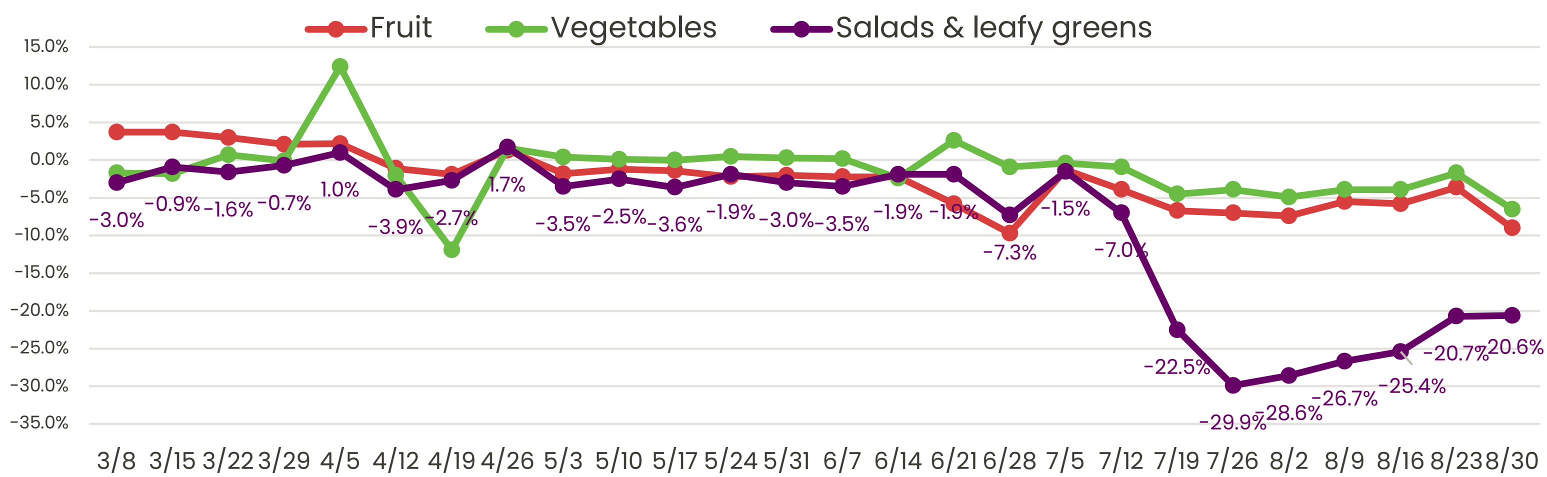
SPECIAL REPORT

Fresh produce sales remain under tremendous pressure with August dollar sales were down $576 million or 6.0% and 6.7% in units year over year. Fruit dollar sales were down 5.2% and vegetables 6.9%. Salads and leafy greens remained down by more than 20% year over year, while tropical and specialty fruits, cruciferous and root vegetables were the only categories with unit sales growth.

Volume sales versus last year fresh fruit, vegetables and salads/leafy greens



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