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

September 2026 | The four weeks ending 9/27/2026

Written by:
Anne-Marie Roerink | President | 210 Analytics

INTERNATIONAL FRESH PRODUCE ASSOCIATION



Produce Purchase Patterns Remained Disrupted in September

Fuel prices climbed back to their May peak levels, prompting consumers to have to balance fuel and grocery budgets once more. This led to flat unit sales for total food and beverages. Produce also had its unique challenges, with continued double-digit declines in salads and leafy greens as shopping patterns have yet to recover to early-July trends.

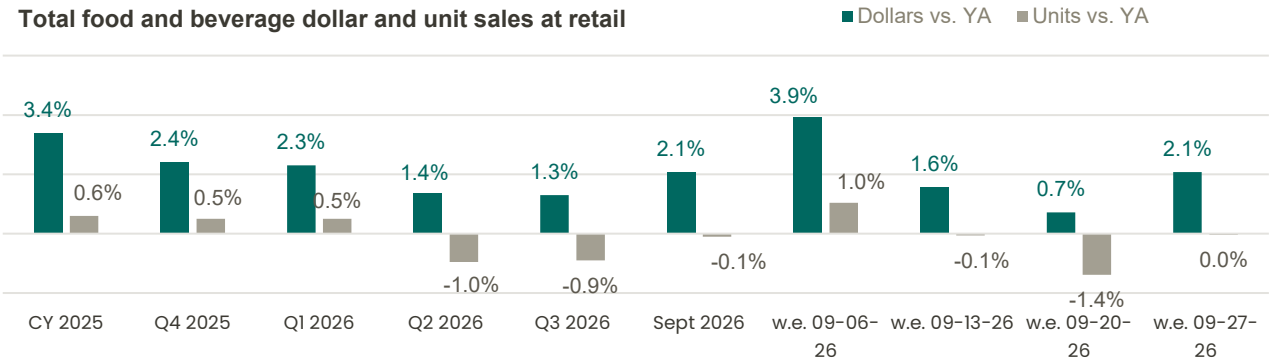
WHAT'S NEW

MONTH IN REVIEW



Consumers Once More Balancing Grocery and Gasoline Budgets

- Consumer confidence dropped again in September amid rising energy cost concerns, while the first increase in interest rates to 3.75%-4.0% since 2023 may add pressure in the months ahead.
- Unemployment was unchanged at 4.1% in August (the latest available), with 1.05 job openings for every unemployed worker.
- Gas prices climbed back to May peak levels, forcing consumers to balance spending on gasoline and groceries. According to AAA, gasoline prices hit a Labor Day high of $4.15 per gallon. Credit and debit card data from Consumer Edge show that grocers lost 37 basis points of wallet share from March through August 2026 versus the same period in 2025.
- Foodservice traffic remained soft, with trips declining year over year across the 12-month, three-month and one-month periods. Casual dining and fast-casual restaurants posted modest gains.
- Higher temperatures over Labor Day boosted beverage, grilling meats, frozen dessert and produce demand.
- Total food and beverage performance was similar in Q3 and Q2, with unit sales declining around 1% and dollar sales increasing 1.3%. September showed signs of improvement. Retail food and beverage unit sales were essentially flat year over year, down 0.1%, during the four weeks ending September 27.



MONTHLY SALES REVIEW



Holiday Week Brings Fresh Produce Growth

The week-by-week sales were a mix. The holiday week (w.e. September 6) had the highest sales volume and also the biggest year-over-year volume gains of +1.3%. Volume fell below year-ago levels again in the third and fourth September weeks, with the week ending September 20 being affected the most, at -2.7%.

	Dollars	$ vs. YA	Lbs vs. YA
Sep 2026	**$7.155B**	**-1.8%**	**-0.5%**
WE 9-6-26	$1.853B	-1.7%	+1.3%
WE 9-13-26	$1.803B	-1.2%	+1.2%
WE 9-20-26	$1.756B	-2.9%	-2.7%
WE 9-27-26	$1.742B	-1.3%	-2.0%

Sources:

Circana, Integrated Fresh, Total US MULO+ | September is the four weeks ending 9/27/2026

POWER FACTS

STATE OF PRODUCE

September 2026	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.75 | -0.8%	$5.0B	-1.3%	-0.5%
Fresh Vegetables	$1.97 | -1.7%	$4.0B	-2.2%	-0.5%

Share of Dollars

$7.2B | -1.8%
Fresh Produce Department

$827M | +6.4%
Frozen Fruits and Vegetables

$477M | +6.4%
Shelf Stable Fruits

$626M | +5.8%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

The top three commodities in absolute dollar growth added more than $75 million year over year with double-digit pound growth. Melons alone added $32 million and kiwis and sweet potatoes closed out the top three commodities. Neither kiwis nor sweet potatoes are big commodities but current social media trends combined with consumers seeking fiber and nutrient dense food led to 33.9% and 29.4% year-over-year pound growth, respectively. While fruit dominated much of 2025 and the first quarter of 2026, vegetables represented seven out of the top 10 commodities in September.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Melons	+$32.0M	$376M	+13.2%
Kiwis	+$22.3M	$84M	+33.9%
Sweet potatoes	+$20.7M	$86M	+29.4%
Apples	+$19.8M	$414M	+0.1%
Potatoes	+$17.5M	$344M	+4.5%
Onions	+$12.8M	$271M	+3.5%
Tomatoes	+$12.4M	$354M	+0.4%
Corn	+$10.2M	$73M	+28.5%
Cucumbers	+$9.0M	$164M	+4.3%
Peppers	+$7.3M	$240M	+1.2%



COMMODITY
SPOTLIGHT

- Apples generated $5.2 billion in the latest 52 weeks, an increase of 2.1% year over year.
- With prices essentially unchanged, growth was demand-driven with pound sales up 2.3% year over year.
- Honeycrisp is the largest variety, at $1.5 billion, up 4.0% in dollars and 9.2% in volume.
- Gala are the second-largest variety, at $797M with slight volume pressure.
- Cosmic crisp is the third largest, at $639 million, featuring tremendous pound growth of 21.6% year over year.

INTERNATIONAL FRESH PRODUCE ASSOCIATION

Sources:
Circana, Integrated Fresh, Total US MULO+

Inflation Insights
Retail price growth in Circana's MULO+ universe was stable at 2.2% in the third quarter and September 2026. While a few categories, such as the candy aisle, continued to post accelerated price growth, inflation rates have either slowed or held steady across most retail food and beverage categories. Premium choices, that also feed into higher prices, held as shoppers continued to prioritize quality and health.

Price trends varied widely:

- Center-store prices reached an average of $4.17 per unit in September, up 3.5% year over year.
- The average unit price across all perishable departments was $4.40, up 0.8% versus September 2025.

Food & bev.	2019	2020	2021	2022	2023	2024	2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Sep 2026
PPU	$3.13	$3.31	$3.49	$3.93	$4.17	$4.24	$4.29	$4.32	$4.33	$4.39	$4.40	$4.41
Change	+2.0%	+5.7%	+5.5%	+13%	+6.1%	+1.7%	+2.6%	+1.8%	+2.0%	+2.3%	+2.2%	+2.2%

FUTURE OUTLOOK

- The National Retail Federation predicts consumers will spend $890 per person on holiday gifts, food, decorations and other seasonal items, down 1.3% from the 2025 record. Online shopping is predicted to remain the top destination (55%), followed by grocery stores (46%).
- The channel mix continued to grow in favor of club stores and grocery e-commerce. Online grocery shopping momentum continues to pick up steam, driven by higher household penetration, growing order frequency though flat average order value.
- AI is becoming its own shopping channel. Several grocery companies reported on the growing influence of AI on basket sizes and sales. Andy Fang, co-founder of DoorDash, reported AI-driven grocery baskets being 50% larger than non-AI orders plus consumers check out 5x faster than without using AI. Instacart's Chris Rogers added that online grocery remains underpenetrated but AI is poised to expand adoption across categories.
- Health and wellness are moving from reaction to prevention, with consumers increasingly focused on living an active lifestyle, supplements and the ingredients and nutrients in the food they eat. Protein is the top nutrient sought out by consumers, with even greater emphasis among GLP-1 users.

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

Sources:
Circana, Integrated Fresh, Total US MULO+

METRICS

September 2026 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$7.2B**	**-1.8%**	**-0.5%**
Fresh fruit	**$3.7B**	**-1.3%**	**-0.5%**
Berries	$867M	-4.2%	-12.5%
Grapes	$496M	+0.6%	-3.6%
Apples	$414M	+5.0%	+0.1%
Melons	$376M	+9.3%	+13.2%
Bananas	$298M	-4.5%	-1.5%
Avocados	$255M	-0.1%	+4.7%
Mandarins	$175M	+0.9%	+0.8%
Peaches	$103M	-16.1%	-21.1%
Pineapples	$90M	+0.6%	+2.4%
Oranges	$89M	-5.3%	-1.7%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$3.3B**	**-2.2%**	**-0.5%**
Tomatoes	$354M	+3.6%	+0.4%
Potatoes	$344M	+5.4%	+4.5%
Onions	$271M	+5.0%	+3.5%
Lettuce	$263M	-4.9%	-9.2%
Salad kits	$243M	-28.3%	-26.6%
Peppers	$240M	+3.1%	+1.2%
Cucumbers	$164M	+5.8%	+4.3%
Carrots	$130M	+0.3%	-1.6%
Broccoli	$116M	+2.6%	-5.3%
Mushrooms	$97M	-6.3%	-9.0%
September 2026 sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat dpt.	$8.7B	+1.5%	+1.0%
Refrigerated dpt.	$7.9B	-0.6%	+1.1%*
Deli dpt.	$4.3B	+0.5%	-0.2%*
Bakery	$3.7B	-0.9%	-2.4%*
Seafood dpt.	$666M	+5.8%	+4.8%

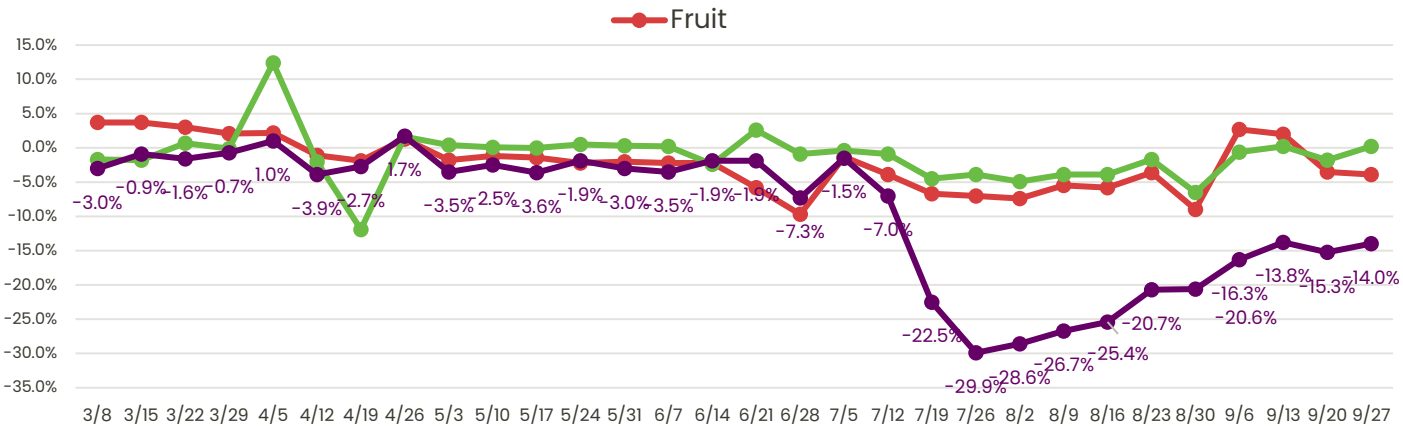
Source: Circana Integrated Fresh, Total U.S., MULO+, fixed and random weight items combined into department views * = unit sales

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

SPECIAL REPORT

Salads and leafy green unit sales declined 16.4% for the month, despite modest week-to-week improvements. Volume sales were down 29.9% during the first full week following the Cyclospora outbreak in late July and have recovered to within 14% of last year's volume during the week ending September 27.

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



Read the latest media statement and guidance from IFPA's Max Teplitski. **Learn more**

Sources:
Circana, Integrated Fresh, Total US MULO+