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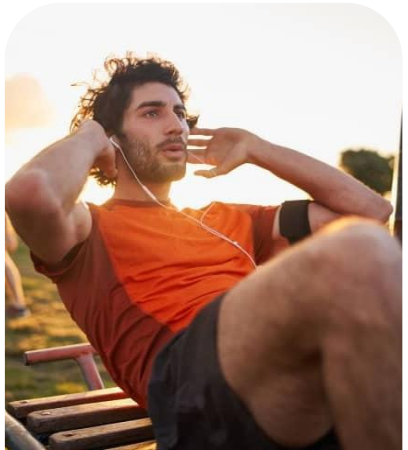
What Shoppers Will Buy Next in Produce & Floral

Consumer Trend Deep Dive





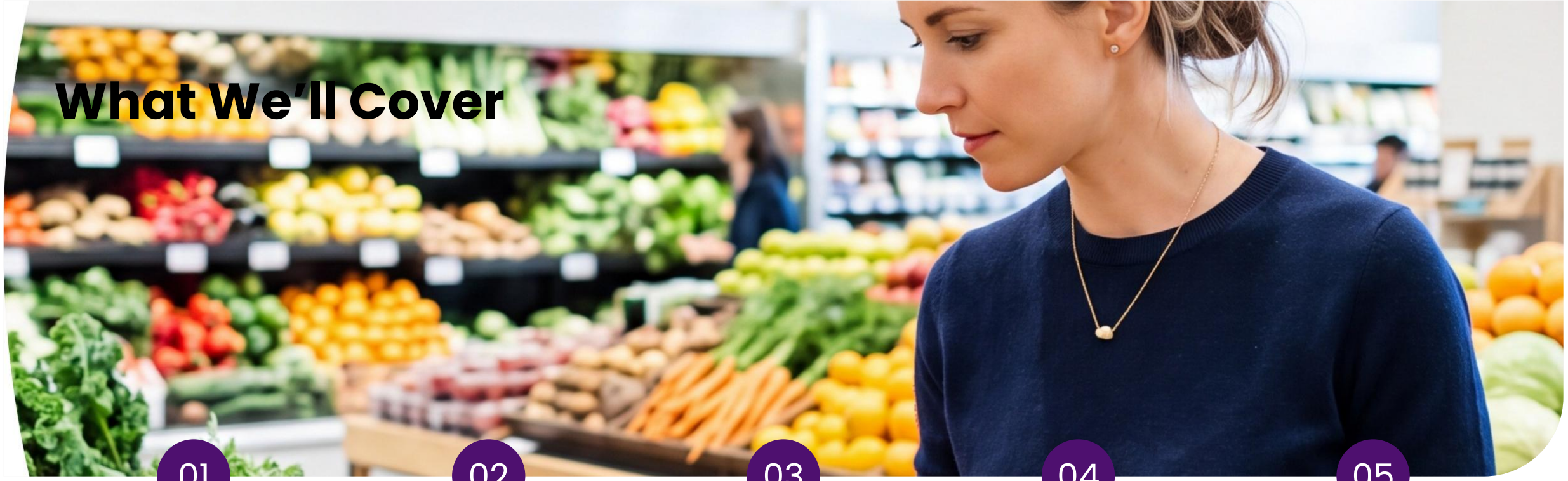




October 14, 2026

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What We'll Cover



01 Consumer Climate

02 Produce Performance

03 Floral Performance

04 Global Consumer Learnings

05 Future Considerations

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Circana & IFPA

Leverage monthly updated sales and shopper insights for the US Produce and Floral Industry powered by Circana!

Located on the IFPA Website: Produce Consumption Data



Don't Miss our Quarterly Webinar Series

December 2nd

Scan to learn more

Consumer Context

Shaping the Produce & Floral Industry

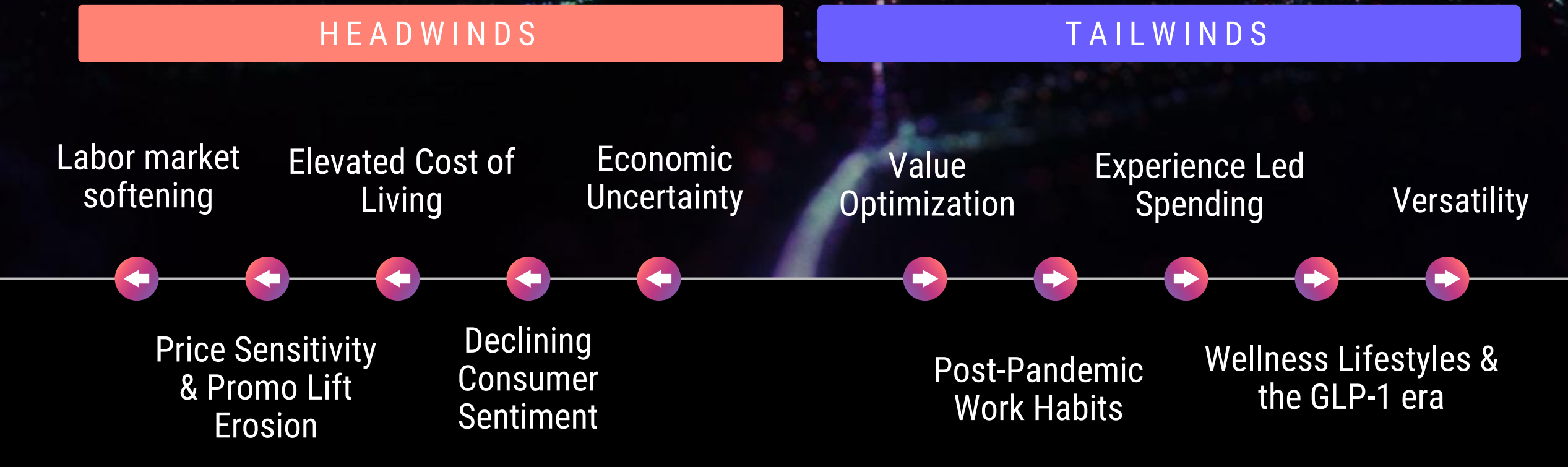




01

Headwinds and Tailwinds

Consumers are responding to economic uncertainty with more intentional choices, prioritizing value, convenience, and flexibility while maintaining a focus on everyday health and wellness. As routines continue to evolve—from hybrid work to shifting health priorities—food and beverage decisions are increasingly centered on practical, versatile solutions that fit seamlessly into daily life.



Today's consumers are

HIGHLY ADAPTABLE & INCREASINGLY INTENTIONAL

Market is fundamentally different:

- More and different ways to **EAT**
- More and different ways to **BUY**
- More and different **LIFE EXPERIENCES**

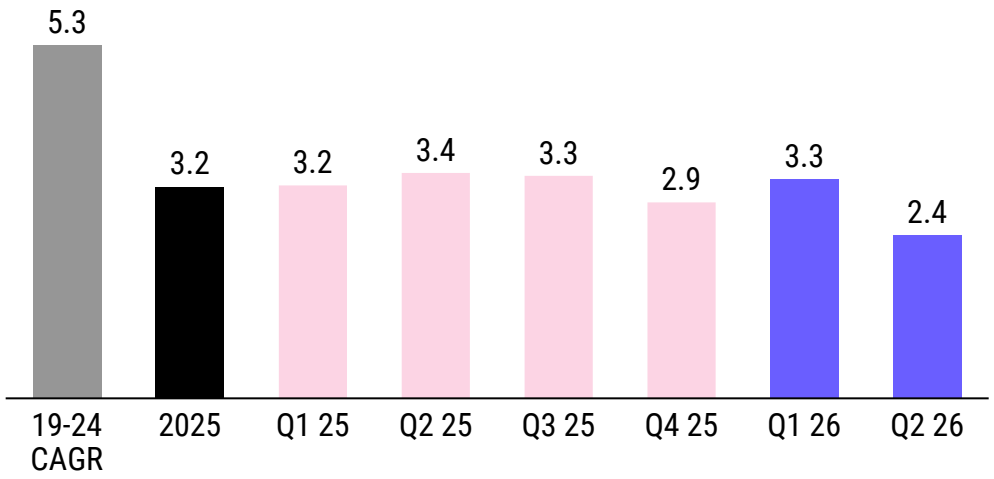


Source: Quote from Stuart Aiken, Circana CEO, Feb 2026 Circana Unpacked Podcast

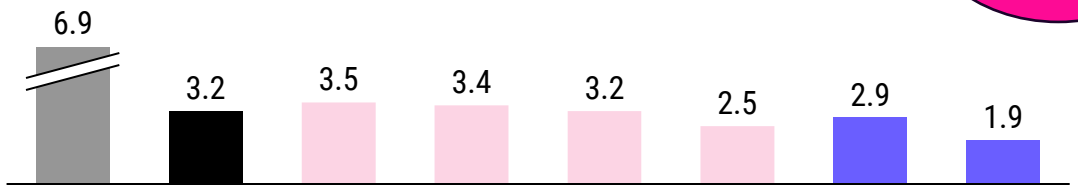
Food & Beverage Sales Growth Rate Lowest in Q2 2026

Complete F&B Market Growth Trends / $ Sales, % Change vs. YA

Total U.S. Food & Beverage | L52 Sales: $1,804 B



Retail / At-Home | L52 Sales: $1,089 B



	19-24 CAGR	2025	Q1 25	Q2 25	Q3 25	Q4 25	Q1 26	Q2 26
$ share	60.8%	60.5%	60.4%	60.3%	60.1%	61.2%	60.1%	60.0%
(ppt. chg.)	**+4.5**	0.0	+0.2	0.0	-0.1	-0.2	-0.2	-0.3

Foodservice / Away-From-Home | L52 Sales: $715 B



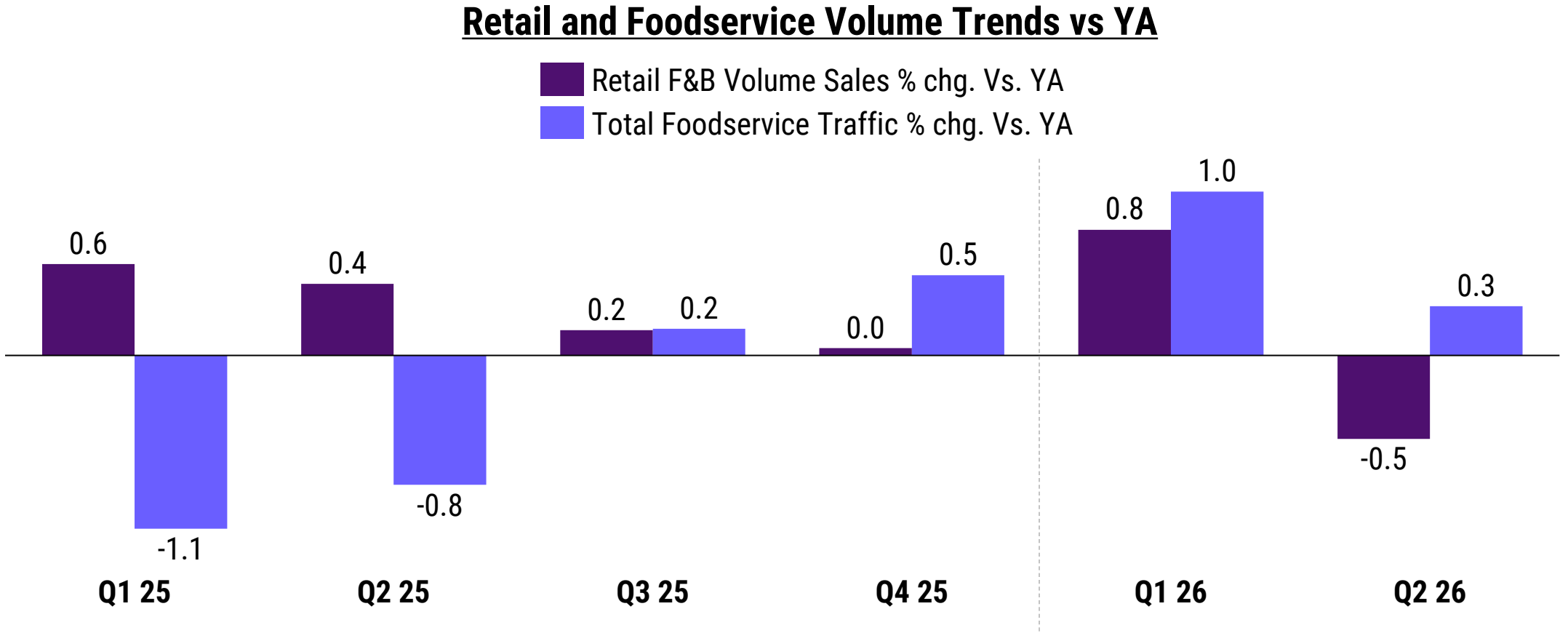
	19-24 CAGR	2025	Q1 25	Q2 25	Q3 25	Q4 25	Q1 26	Q2 26
$ share	39.2%	39.5%	39.6%	39.7%	39.9%	38.8%	39.9%	40.0%
(ppt. chg.)	**-4.5**	0.0	-0.2	0.0	+0.1	+0.2	+0.2	+0.3

60%
F&B spend from retail

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Note: Retail quarters adjusted to control for holiday (Easter, July 4) timing falling in between quarters. Retail measured by POS channels, as defined as MULO+ with Conv. Includes fresh foods. Foodservice sales based on consumer data, excluding tips. Foodservice excludes bars/drinking places accounting for ~$250B. Source: Circana POS and consumer data ending June 2026. Circana Executive CPG & Foodservice Advisory.

Lower retail and foodservice Q2 performance driven by lower volume trends



Note: Weeks included in retail quarters adjusted to control for holiday (Easter & July 4) timing falling in between quarters. Foodservice includes commercial and noncommercial foodservice. Source: Circana POS and consumer data ending June 2026. Circana Executive CPG & Foodservice Advisory.

Consumer Combatting Inflation- **Just in Time** Shopping Patterns Continue

Produce is the **most frequently bought** fresh department

All Food & Beverages, including Fresh Produce & Floral

Avg Price Paid per Unit

$4.13

Up 4% vs 2YA

Product Trips per Buyer

224 annually

Up 6% vs 2YA

In Basket Dollars per Trip

$53.42

Flat vs 2YA

Source: Total Edible, Circana Integrated Fresh Scan Panel, 52 weeks ending 7/12/26

Produce

Retail & Food Service Performance





02

-5.1

Lost **produce** dollar share points by **Traditional Food Channel** to all other retail channels 2026 vs. 2022



Source: Circana Integrated Fresh Scan Panel using All Outlets vs Traditional Food Channel (Food Channel ex Value & Health)



Fruits & Vegetables in Foodservice

Total produce is down in the past year in foodservice, though demand for some fruit and veg specific categories is growing

12%

Fruits/vegetables account for 12% of all foodservice food/beverage pound shipments

Fruit/vegetable pound shipments decreased by **-1.6%** vs. a year ago

+0.5%

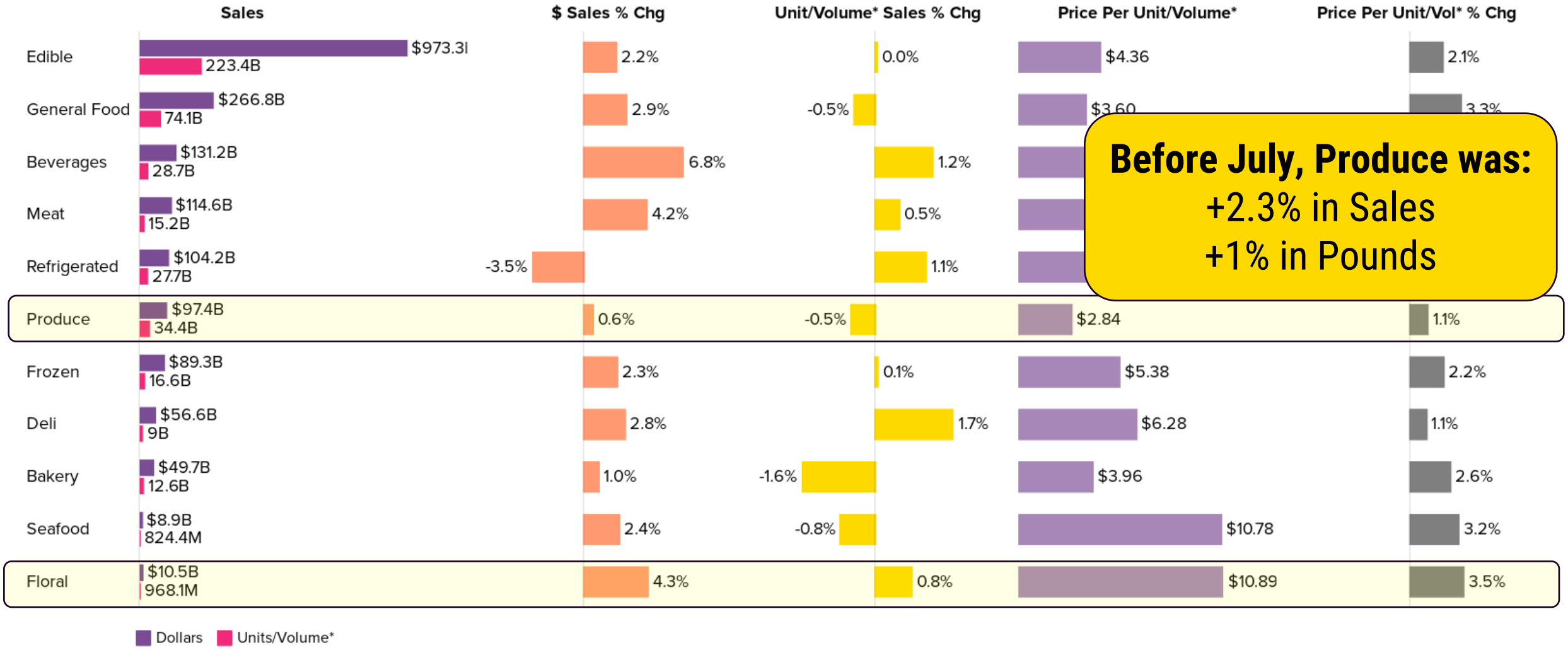
Excluding potatoes, fresh vegetable pounds **grew by +0.5%** vs. YA

43 out of 71 fresh vegetable categories grew pounds in the past year

Source: Circana, SupplyTrack, total foodservice pounds, 12 ME July 2026 vs. YA
71 fresh vegetable categories includes those with >1k annual pounds

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Produce Under Food & Bev Retail Growth – Floral Outperforms



Before July, Produce was:
+2.3% in Sales
+1% in Pounds

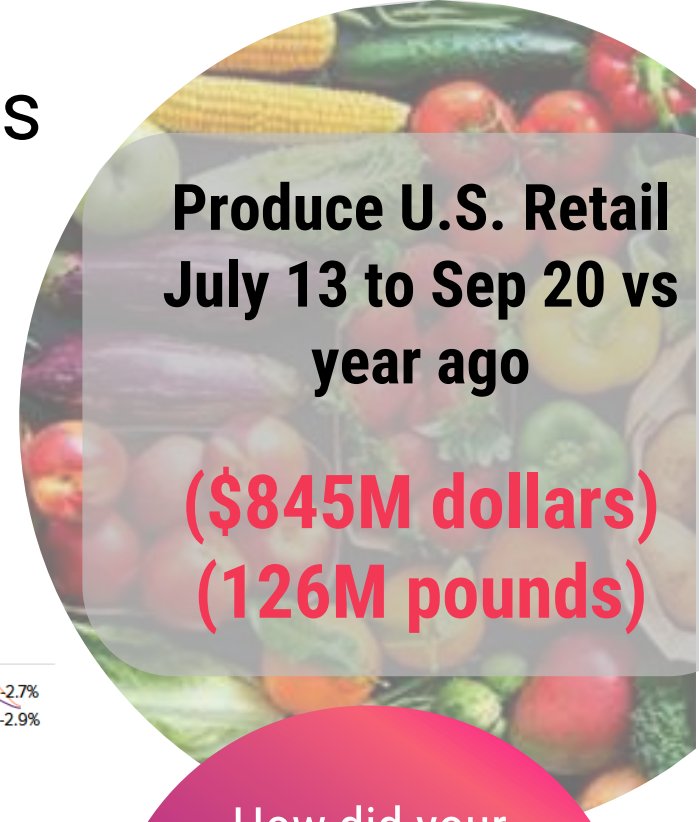
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Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 09-20-26



Source: Circana Total Shopper Survey Results data ending 8/11/2026, Base=Total Respondents

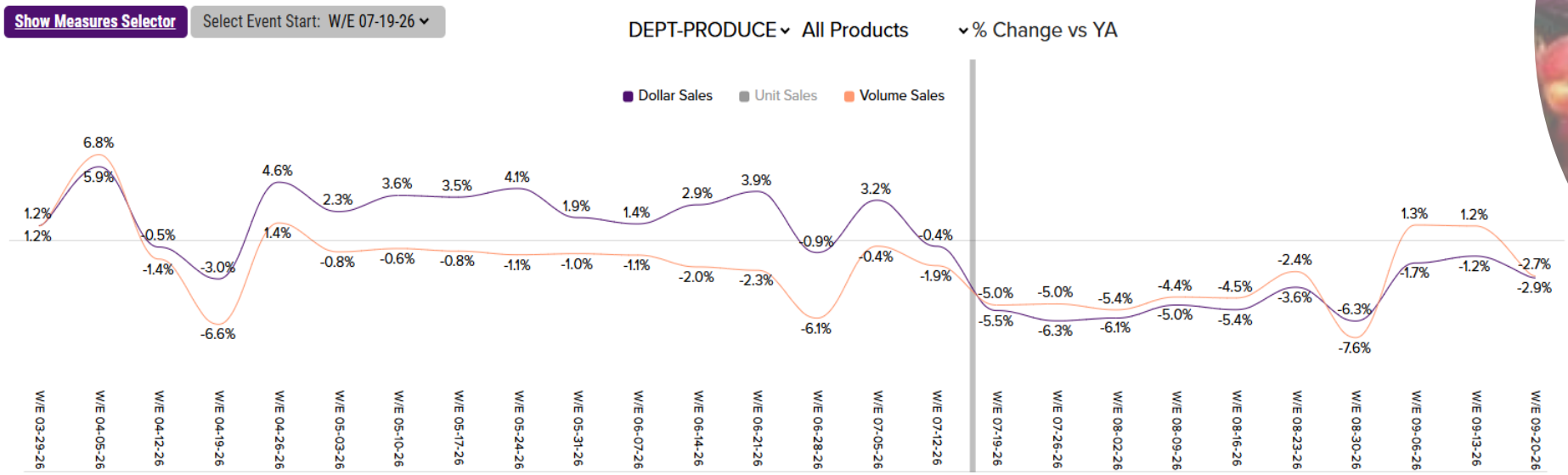
Produce Sales Trending Below Previous Years after Mid-July Food Safety News



Produce U.S. Retail July 13 to Sep 20 vs year ago

($845M dollars)
(126M pounds)

Weekly Sales Tracker



		Dollar Sales				Unit Sales				Volume Sales			
Product	Organic Claim	L52	L13	L4	L1	L52	L13	L4	L1	L52	L13	L4	L1
DEPT-PRODUCE	All Products	0.4%	-3.2%	-3.0%	-2.9%	-0.7%	-4.7%	-4.3%	-4.8%	-0.2%	-3.3%	-2.0%	-2.7%
AISLE-FRESH FRUIT	All Products	0.4%	-2.9%	-2.4%	-2.5%	0.8%	-4.1%	-4.0%	-5.4%	-0.1%	-3.9%	-1.9%	-3.5%
AISLE-FRESH VEGETABLES	All Products	0.5%	-3.4%	-3.7%	-3.2%	-1.9%	-5.2%	-4.5%	-4.3%	-0.3%	-2.4%	-2.2%	-1.8%
FRESH SALADS & LEAFY GREENS	All Products	-3.0%	-17.5%	-17.6%	-16.0%	-5.2%	-18.8%	-18.1%	-17.0%	-6.0%	-17.9%	-16.5%	-15.3%

How did your fruit or vegetables fair?

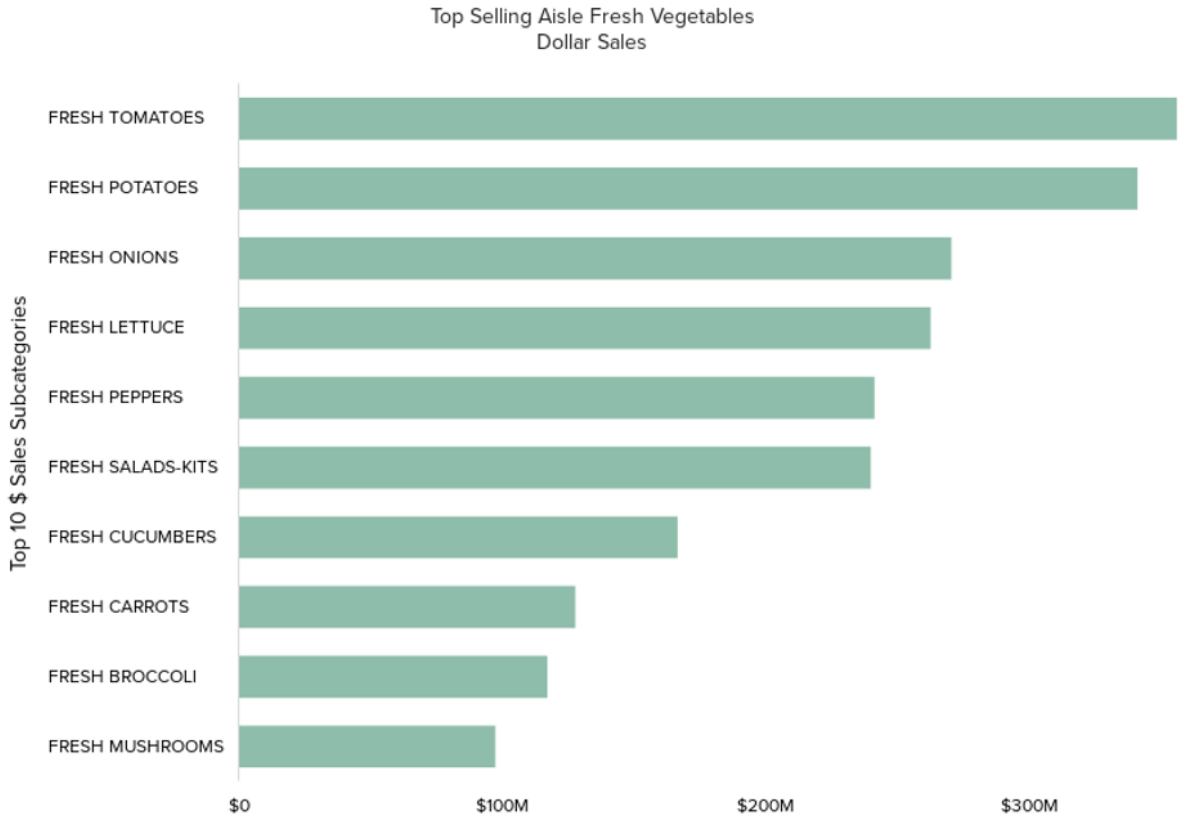
Scan to learn more

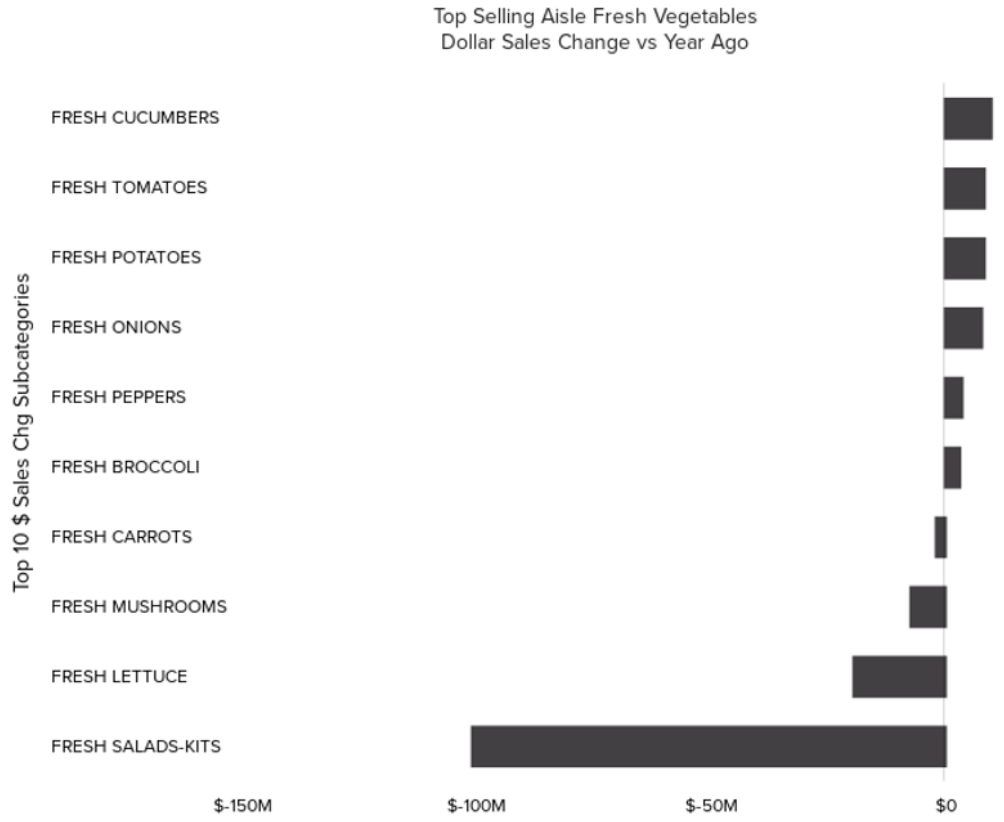
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Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 09-20-26

Fresh Tomatoes and Potatoes Lead Sales and Growth; Virality & Versatility Fueling Cucumber

AISLE-FRESH VEGETABLES Total All Products Total All Products Latest 4 Weeks Ending 09-20-26 Dollar Sales





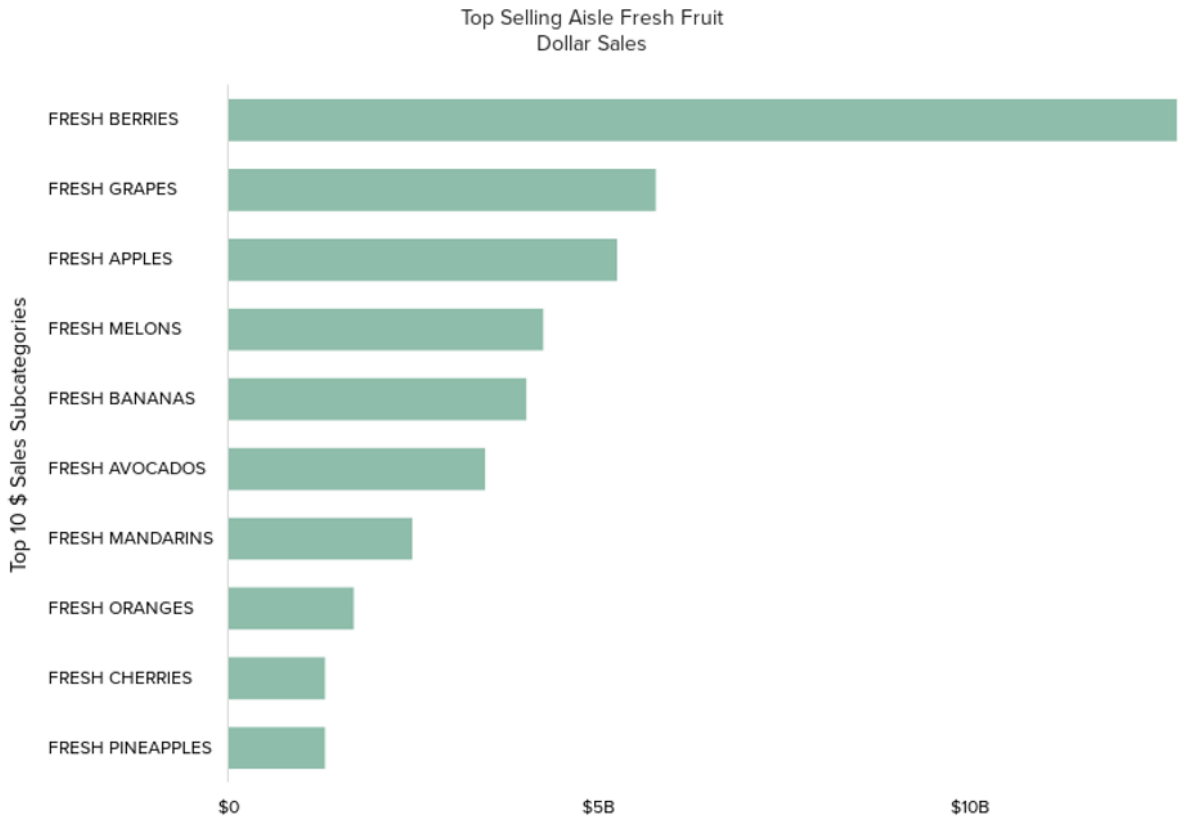
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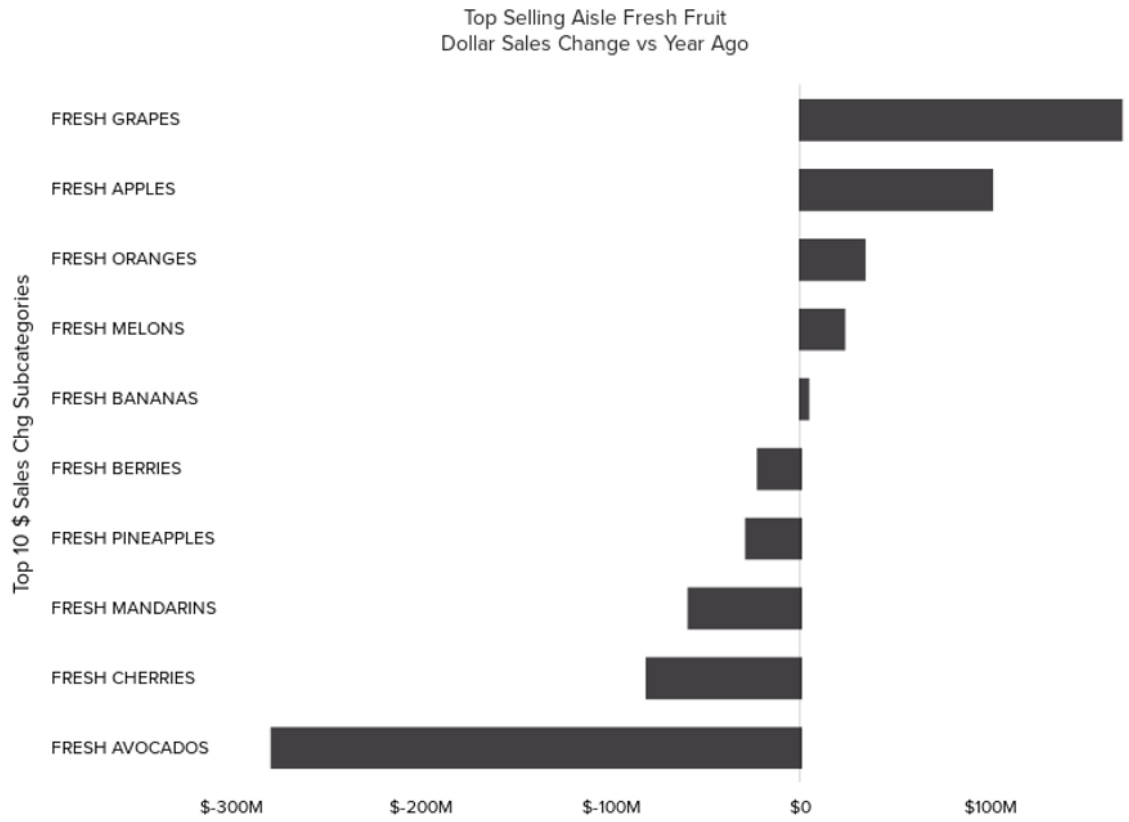
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Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 09-20-26

Berries drive 1 in 4 Fresh Fruit Dollars Sold Annually; More Stores + New Varieties Both Driving Grapes, Apples, Melons

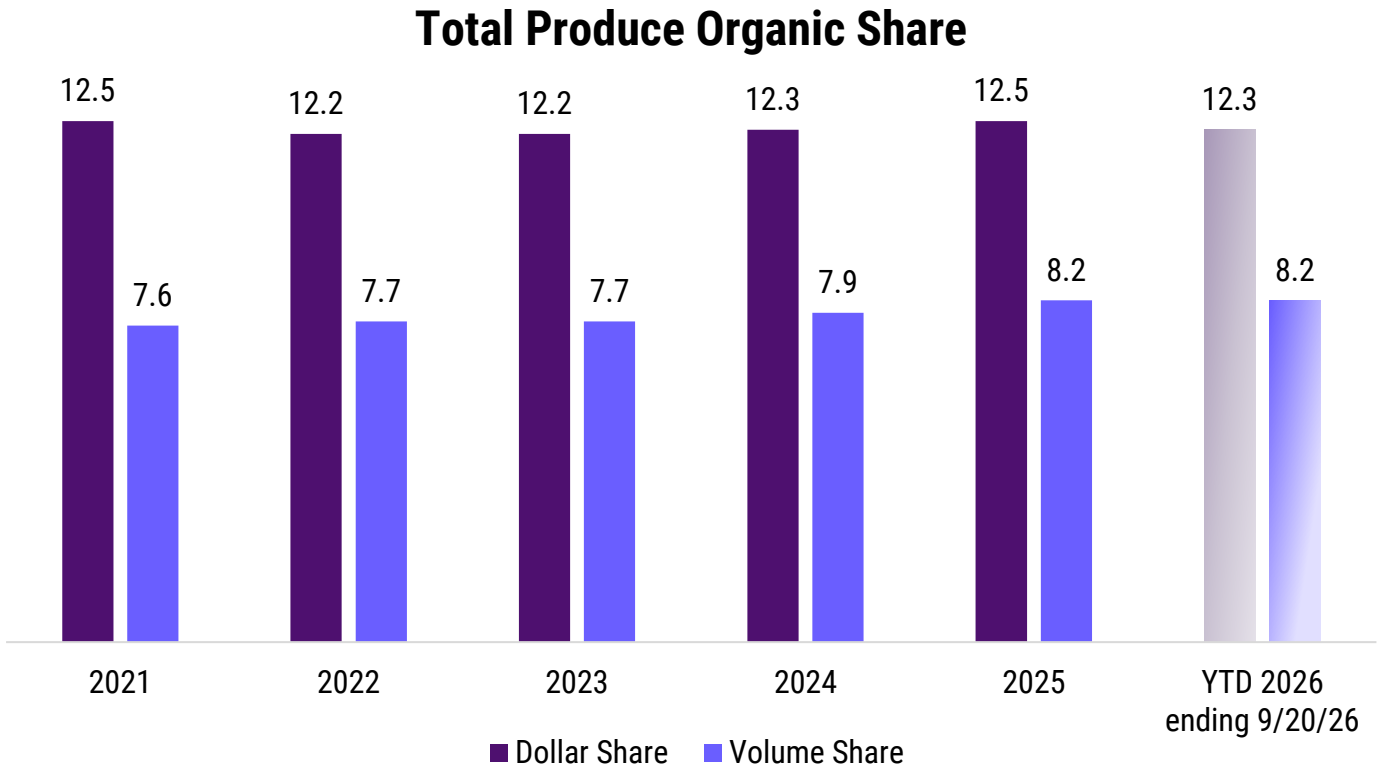
AISLE-FRESH FRUIT Total All Products Total All Products Latest 52 Weeks Ending 09-20-26 Dollar Sales





Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 09-20-26

Organics are continuing to be a driver for total produce & are a growing demographic to capture



Organic Shopper

Affluent, educated, health-focused young families – a growing and attractive demographic for produce!

Child Age 0-5	205
Post Graduate	180
Asian Households	184
Families w/ Children	160
Income $100K+	153
College Graduate	131
Millennials	118
No Children	94
Lower Income HHs	80



Source: Circana Integrated Fresh POS, Total US MULO+, W/E 9/20/26

Floral

Retail & Food Service Performance





03

Floral Plays Vital Roles in U.S. Retail

Setting the stage for a great shopping experience – in-store and online – now more than ever

BASKET BUILDER



CREATE ESCAPES & CONNECTIONS



CELEBRATION SHOWROOM & SOLUTION



DIFFERENCE MAKER for CART-STOPPING SHOPPING



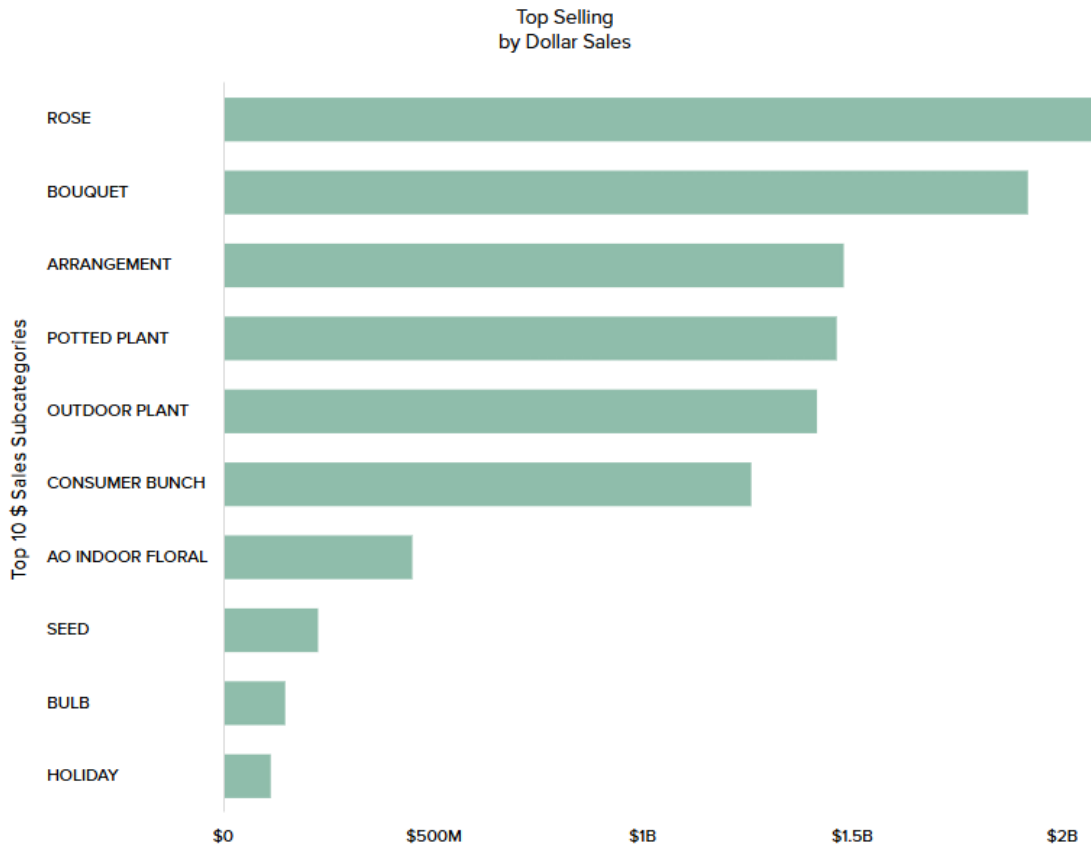
Floral Top Subcat Performance

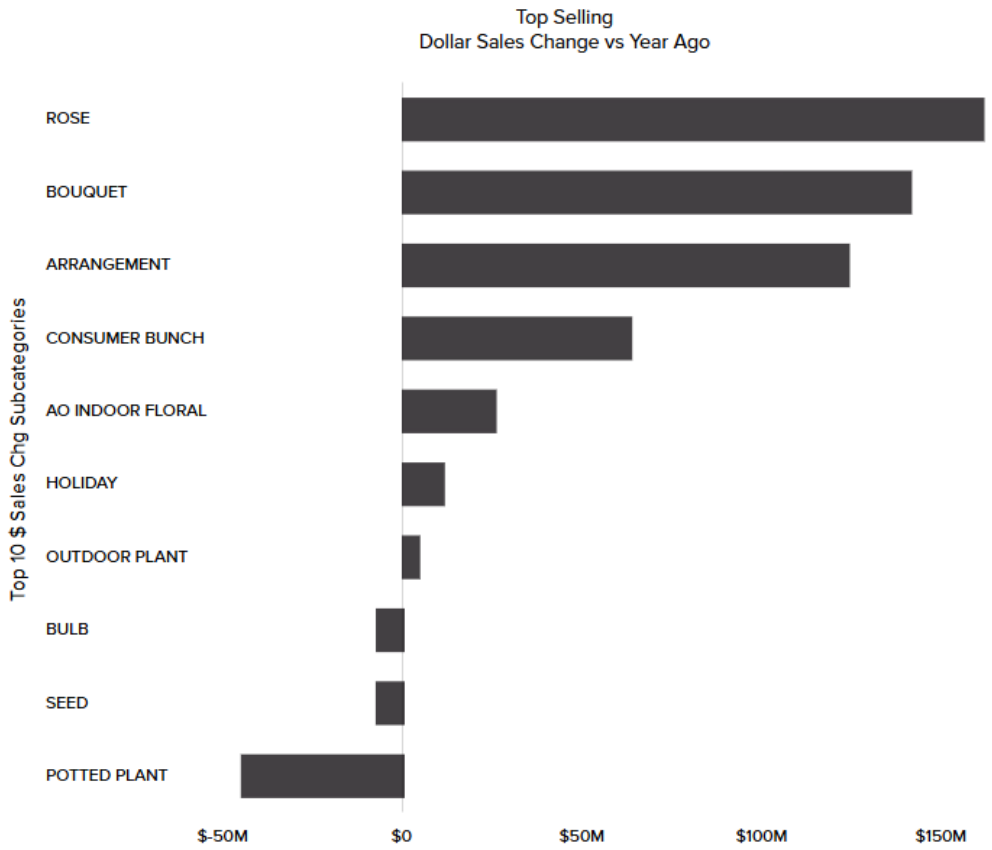
Floral U.S. Retail Sales

$10.5B	+5%
1B Units	+1%

In Rolling 52 Weeks Ending 08-09-26 Rose is ranked 1st in Dollar Sales out of 11 subcategories.

Rolling 52 Weeks Ending 08-09-26 | Dollar Sales





Source: Circana Integrated Fresh POS, Total US MULO+, 52 weeks ending 08-09-26

Gen Z is now the only generation spending more in Produce than Total Retail F&B



Gen Alpha

Born 2013-2025
0-12 years old



Gen Z

Born 1997-2012
13-28 years old



Millennials

Born 1981-1996
29-44 years old



Gen X

Born 1965-1980
45-60 years old



Baby Boomers

Born 1946-1964
61-79 years old



Seniors

Born Before 1946
80+ years old

SHARE OF POPULATION

	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers	Seniors
	14%	21%	22%	19%	19%	5%
Share of Dollar Spend						
Total F&B	N/A	*5%	28%	32%	33%	2%
Produce	N/A	*6%	28%	31%	33%	2%
Floral*	N/A	7%	26%	34%	29%	4%

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*Floral, Source: Circana Fresh Shopper Loyalty, L52wks ending 09-06-26- Grocery Stores Only

*Source: U.S. population share by generation 2024 | Statista: Source: Circana Fresh Panel, Total US – All Outlets, L52wks ending 09-06-26 % of spend controlled by generation, as determined by head of householder age, *Gen Z retail sales is representative of 19-28 years olds*