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

July 2026 | The four weeks ending 7/26/2026

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INTERNATIONAL FRESH PRODUCE ASSOCIATION

External Forces Shape Fresh Produce Demand in July

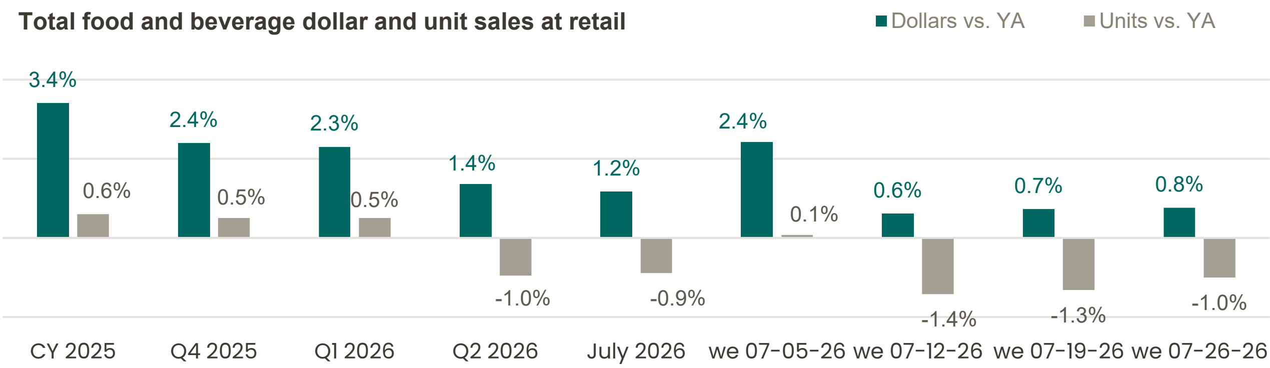
July was a tough month for fresh fruit and vegetable sales. Financially-strained consumers pulled back on total food and beverages, with the exception of the holiday week. Additionally, fresh produce sales were impacted by the food safety outbreak.

WHAT'S NEW

MONTH IN REVIEW

Macro pressures continued to impact sales in July

- Macro pressures on retail spending persisted, though the July rate of inflation slowed and fuel prices improved compared to earlier in the year. The University of Michigan's July Consumer Sentiment Index rising nearly 12% from June to 55.2, though it remained 10.5% below July 2025.
- The national average price for regular gasoline in the U.S. was $4.09 per gallon, with substantial volatility throughout July, increasing fuel costs by roughly $20 per week for the typical household.
- Large chain restaurants continued to experience a 2% decline in visits in July, according to Circana.
- Tighter SNAP eligibility requirements are reducing program participation, resulting in an estimated $10 billion reduction in EBT benefits in 2026. Combined with pressured personal savings, consumers are likely to maintain a disciplined approach to spending.
- Total retail food and beverage unit sales declined 0.9% during the four weeks ending July 26. Weekly performance ranged from flat during the Fourth of July holiday week to a decline of 1.4% in the second week of July. Non-food unit sales fell 2.6% in the latest four weeks. These trends were largely unchanged from the second quarter and remained softer than earlier in the year.



MONTHLY SALES REVIEW

July Fourth delivered dollar, but not pound gains

The holiday week was an exception to an otherwise subdued July performance. Pound sales were down year over year each week and the final two weeks were substantially impacted by the outbreak/recall.

	Dollars	$ vs. YA	Lbs vs. YA
July 2026	$7.9B	-3.0%	-3.7%
w.e. 07-05-26	$2.3B	+2.6%	-1.0%
w.e. 07-12-26	$2.0B	-1.3%	-2.8%
w.e. 07-19-26	$1.8B	-6.4%	-5.9%
w.e. 07-26-26	$1.8B	-7.4%	-5.8%

Sources:
Circana, Integrated Fresh, Total US MULO+ | July is the four weeks ending 7/26/2026

POWER FACTS

STATE OF PRODUCE

July 2026	Price/Lb. vs. YA	$ Sales	$ vs. YA	Lbs. vs. YA
Fresh Fruits	$1.57 | +0.7%	$4.3B	-3.9%	-4.5%
Fresh Vegetables	$2.05 | +0.7%	$3.4B	+1.7%	-2.3%

Share of Dollars

$7.9B | -3.0%
Fresh Produce Department

$816M | +5.7%
Frozen Fruits and Vegetables

$446M | +4.0%
Shelf Stable Fruits

$519M | +5.1%
Shelf Stable Vegetables

TOP GROWTH COMMODITIES (NEW $)

$ Absolute $ gain vs. YA

Inflation propelled tomatoes to the top spot in the absolute dollar growth rankings. Tomato sales increased by $23 million year over year. Celery a newcomer in 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 July, 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 onions.

Product	$ vs. YA	$ sales vs. YA	Lbs sales vs. YA
Tomatoes	+$23.2M	$426M	-2.7%
Apples	+$22.6M	$359M	+2.5%
Kiwis	+$19.2M	$72M	+29.8%
Sweet potatoes	+$17.6M	$74M	+30.3%
Peppers	+$14.9M	$261M	+2.0%
Onions	+$13.1M	$279M	+1.3%
Cucumbers	+$7.8M	$179M	-0.6%
Celery	+$3.9M	$75M	-4.4%
Peaches	+$3.9M	$157M	-0.3%
Broccoli	+$2.8M	$118M	-9.9%

COMMODITY
SPOTLIGHT

- Fresh apple sales reached $5.2 billion over the past year.
- Dollar sales increased by 1.9%, while pound sales grew by 1.5%.
- Apples are on a comeback tour with pound sales 3.5% ahead of two years ago and 11.0% ahead of three years ago.
- Retailers carry an average of 37 to 38 apple SKUs during a typical week, which is down by 1.2% versus last year.
- Apple prices have been very constant, at $1.81 a pound. This is unchanged from last year and down 7.1% from three years ago.

Inflation Insights

Retail price growth in Circana's MULO+ universe decelerated to 2.1% in July 2026 (the four weeks ending July 26, 2026), down from 2.3% in the second quarter of 2026. Price trends varied widely:

- Center-store prices reached an average of $4.13 per unit in July, up 3.2% year over year.
- The average unit price across all perishable departments was $4.36, up 1.2% versus July 2025.
- Coffee, chocolate and beef prices remained elevated, although inflation rates for coffee and beef moderated as year-over-year comparisons lapped earlier price increases. Egg prices continued to decline in July.

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

- Circana expects volume trends to remain constrained as consumers continue to rationalize spending and make more intentional purchases while prioritizing products that deliver the outcomes they seek, including wellness, relevance and quality.
- Holidays remain occasions when consumers are willing to splurge. The week ending July 5 was the only week to post positive unit growth. Retailers may find additional opportunities by leaning into secondary and self-created holidays. For example, "Summerween" (celebrating Halloween during the summer) has gained traction, with 67% of parents purchasing Halloween candy during the summer and others carving watermelons instead of pumpkins.
- Consumers continue to seek nostalgic comfort foods tied to emotional eating and meaningful connection, a trend referred to as "grandmacore" dining in foodservice.
- Fifty-five percent of U.S. consumers now snack three or more times per day, according to Circana's *Global Snack Unwrap*. U.S. snack sales reached $231 billion, up 3.2% year over year. Private brands continue to expand, with both value-conscious and premium-seeking consumers driving market polarization. Snack-as-meal behaviors are also fueling sustained growth, reflecting the category's evolution into a core part of daily nutrition.
- In Real Life (IRL) streaming has become a meaningful marketing opportunity for brands, particularly among Gen Z audiences who value authenticity and relatability.
- The influence of GLP-1 medications continues to grow, with retailers expanding GLP-1-related merchandising through lifestyle-friendly food recommendations, shelf tags, and other in-store programming.

METRICS

July 2026 sales	$ Sales	$ vs. YA	Lbs vs. YA
Fresh Fruits and Vegetables	**$7.9B**	**-3.0%**	**-3.7%**
Fresh fruit	**$4.4B**	**-3.9%**	**-4.5%**
Berries	**$901M**	**-6.8%**	**-8.7%**
Melons	$606M	-4.0%	-7.7%
Cherries	$362M	-10.6%	-17.6%
Apples	$359M	+6.7%	+2.5%
Grapes	$353M	-7.5%	-1.1%
Bananas	$306M	-2.7%	+0.4%
Avocados	$283M	-2.0%	+5.7%
Peaches	$157M	+2.6%	-0.3%
Mandarins	$139M	-4.6%	-6.0%
Pineapples	$111M	-5.1%	-3.5%
	Dollars	**$ vs. YA**	**Lbs vs. YA**
Fresh vegetables	**$3.4B**	**-1.7%**	**-2.3%**
Tomatoes	$426M	+5.7%	-2.7%
Potatoes	$320M	-0.9%	+0.4%
Lettuce	$287M	-4.3%	-12.8%
Onions	$279M	+4.9%	+1.3%
Salad-kits	$274M	-19.4%	-18.6%
Peppers	$261M	+6.1%	+2.0%
Cucumbers	$179M	+4.5%	-0.6%
Carrots	$118M	-0.7%	-4.7%
Broccoli	$118M	+2.4%	-9.9%
Corn	$118M	+1.3%	+4.9%
July 2026 sales	**$ Sales**	**$ vs. YA**	**Lbs vs. YA**
Meat dpt.	$8.9B	+1. 2%	-0.7%
Refrigerated dpt.	$7.8B	-3.0%	-3.7%*
Deli dpt.	$4.4B	+0.7%	-0.2%*
Bakery	$3.8B	-0.9%	-2.7%
Seafood dpt.	$698M	+0.6%	-2.8%

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/

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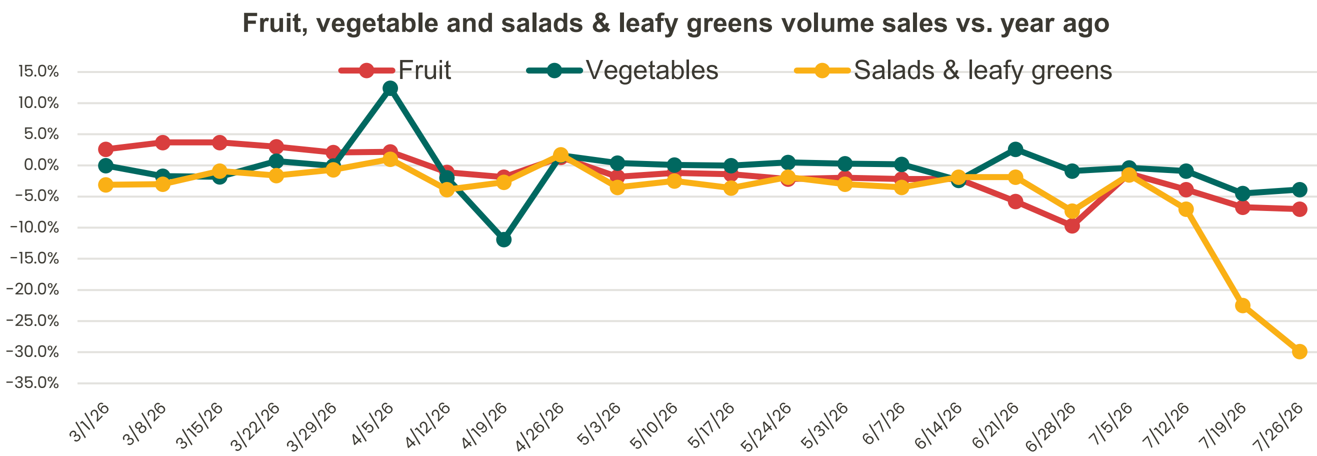
Sources:

Circana, Integrated Fresh, Total US MULO+

SPECIAL REPORT

The week ending July 26 marked the first full week of U.S. retail sales following the cyclospora outbreak. Sales data indicates a broad-based decline in fresh produce purchasing across most categories, retailers and channels. Sixty fresh produce subcategories posted declines in dollars, units and/or volume during the week ending July 26.

Circana is published a Weekly Produce Sales Tracker, accessible here: Unify+ *(Chrome recommended.)*



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