Insights to Action

Q2 2026

2026 Half Year Wrap-up[1]

Produce demand weakened considerably in Q2, as higher retail prices and economic uncertainty reduced shopper trips and pressured volume at the register. While total Edible is also experiencing demand pressure, the slowdown is not as severe as what we are seeing in Produce

Produce: Halfway through the year, produce dollars are up +1.8%, volume is flat (0.0%) vs a year ago.

Fruit: Fruit is up +1.0% in sales, and flat (0.0%) in volume.

Vegetables: Up +2.7% in sales, and +0.1% in volume.

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Channel shifting

Read more on page 2

Beautiful berries

Read more on page 3

Mission-based shopping

Read more on page 2

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Produce at a glance

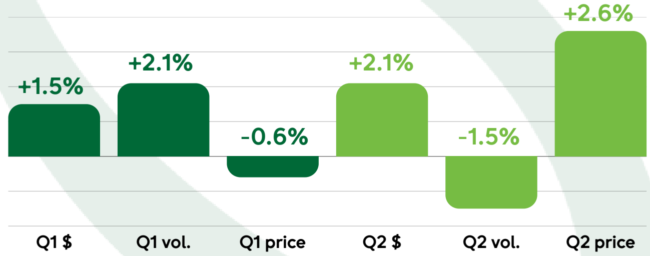
Produce YTD - U.S. multi-outlet[2]

+1.8% vs 2025 ($)

0.0% vs 2025 (lbs)

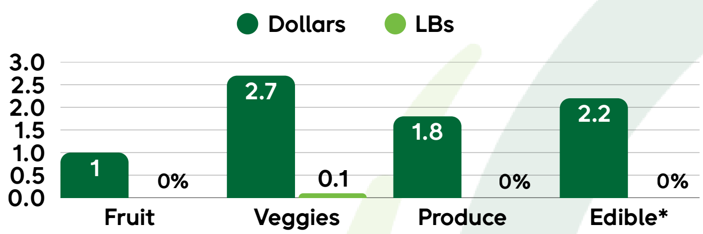
Year-to-date (Q1 & Q2)[3]

($ sales , volume sales, & price per volume % Chg. vs YA)



2026 YTD[4]

($ & lbs % Chg. vs YA)



*Edible volume displayed in units

Regional performance YTD

Region	$Share of produce	$ % Chg. vs 2025	Vol % Chg. vs 2025
Great Lakes	13.3	1.5	0.1
Plains	6.4	1.9	-0.3
South Central	9.1	0.8	-0.2
Southeast	15.7	1.4	0.2
Mid-South	13.0	2.4	0.5
West	12.8	1.2	-0.2
Northeast	17.6	3.2	0.3
California	12.0	0.8	-0.7

Consumer check-in[5]

Channel shifting:

Consumers are becoming more selective with spending, consolidating shopping trips and increasing their use of online channels as they adapt to ongoing economic pressures.

Despite this shift, produce remains a destination category, generating 2.8 billion annual shopping trips, with shoppers averaging 22 produce trips per year and spending nearly $10 per visit.

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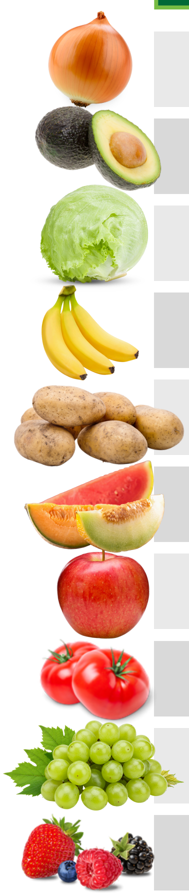


	$ vs PY%	Vol vs PY%	Top 10 fruits & vegetables YTD[6] ($Sales)
	1.3	2.9	$1,848
	-8.9	14.7	$1,951
	7.9	-3.1	$2,066
	-1.0	-0.2	$2,194
	-2.3	-0.2	$2,225
	0.3	-7.0	$2,346
	1.8	3.1	$2,836
	8.9	0.8	$2,965
	3.8	4.0	$3,104
	1.5	-2.7	$7,603

$ Sales (Thousands)

Summer produce demand jumps 15%!

Is your supply chain ready?

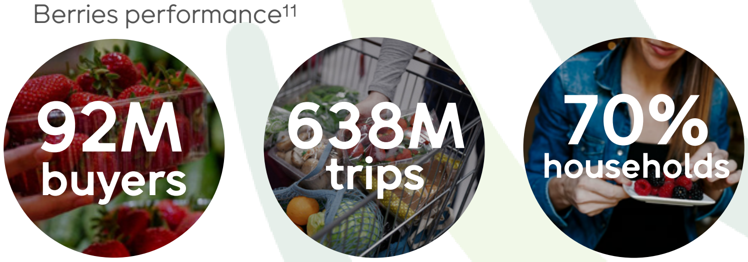
Fruit-fueled demand surges during the summer months, putting forecasting accuracy and execution to the test. Retailers can stay ahead of the spike and avoid costly out-of-stocks by strengthening forecast precision, optimizing cold-chain performance, and expanding sourcing flexibility.

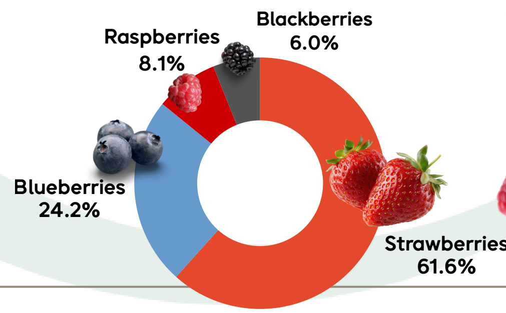
Commodity spotlight: Berries

3YR CAGR (2023 – L52 Wks Ending 7.12.2026)[10]
Dollars: +4.8%
LBs: +4.3%

Berries generated over $7.6 billion in sales, up +1.7% in dollars, but down -2.7% in pounds year-to-date.[7] Berries had a slow Q2 performance, finishing +0.2% in dollars & down -7.1% in volume.[8]

Berries performance[11]





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The rise of Mission-based shopping

A significant retail-grocery trend in 2026 is the rise of mission-based, value-driven shopping, where consumers split trips across formats and make far more deliberate choices about price, pack size, and purpose. This shift is showing up across every major industry dataset and is reshaping how retailers compete.

- **Shoppers are making more frequent, smaller trips, prioritizing value and essentials.**
- **Private brands are gaining share as shoppers look for strong price perception.**
- **Trips are increasingly mission-based (fill-ins, fresh runs, stock-ups).**
- **Digital engagement is now embedded in the grocery journey.**
- **Retailers are leaning into fresh, value clarity, and frictionless experiences to compete.**

Why this trend matters

Mission-based, value-driven shopping is reshaping competition. As shoppers split needs across trip types, loyalty fragments — retailers win by delivering clarity, strong value signals, and reliable fresh quality that help shoppers feel in control of their spend.

Digital influence amplifies this shift. Shoppers often decide before entering the store which mission they're on and which retailer fits it, so seamless digital-to-store execution is essential. Retailers that simplify decisions strengthen retention, while those relying on outdated loyalty assumptions fall behind.

Top promoted fruits[12]

($ Sales > $1B)

<u>$ sales sold on promo:</u>

- Strawberries (55%)
- Watermelon (37%)
- Mandarin (37%)

Top promoted veggies[12]

($ Sales > $500M)

<u>$ sales sold on promo:</u>

- Asparagus (33%)
- Potatoes (23%)
- Lettuce (23%)

Contact us for more information or to set up a time to meet with one of our supply chain experts! **1.800.323.7587**

1 Circana Integrated Fresh Scan Total US MULO+, 13 Weeks Ending 07.12.2026
2 Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 07.12.2026
3 Circana Integrated Fresh Scan Total US MULO+, 2025 - 13 Weeks Ending 07.12.2026
4. Circana Integrated Fresh Scan Total US MULO+ & US Regions Mulo+, Building Calendar Year Ending 07.12.2026
5. Circana Integrated Fresh Panel Total US MULO+, Building Calendar Year Ending 07.12.2026, NBD Adjustment
6 Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 07.12.2026
7 Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 07.12.2026
8 Circana Integrated Fresh Scan Total US MULO+, 2025 - 13 Weeks Ending 03.30.2026
9 Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 07.12.2026
10 Circana Integrated Fresh Scan Total US MULO+, 2023 – Last 52 Weeks Ending 07.12.2026
11 Circana Integrated Fresh Panel Total US MULO+, Building Calendar Year Ending 07.12.2026, NBD Adjustment
12 Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 07.12.2026

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