Insights to Action

Q1 2026

2026 is off to a strong start, with first-quarter dollar sales rising and fruit categories posting volume gains. Despite broader economic uncertainty, consumers continue prioritizing core produce items, which remain resilient, while vegetable category performance has softened.

Produce: Produce dollar sales are up 1.4%, with volume trending 1.9% higher compared to last year.

Fruit: Fruit continues to outperform year over year, driven primarily by the Citrus category, which is up 3.5% in volume.

Vegetables: Year-to-date performance is flat. Herb growth is helping offset declines, while Cruciferous Vegetables continue to struggle at the register.

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Channel shifting

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Mighty melons this summer

Read more on page 3

Convenience is key

Read more on page 4

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Q1 2026

Produce at a glance[1]

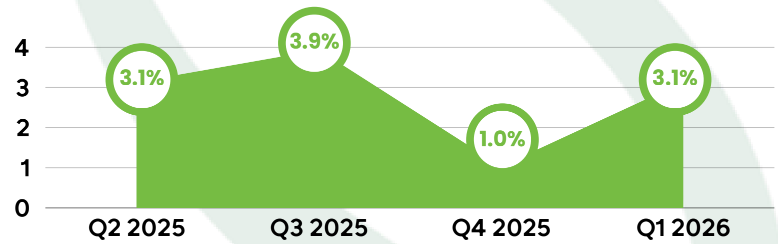
Produce YTD - U.S. multi-outlet

$ +1.4% vs 2025

lbs +1.9% vs 2025

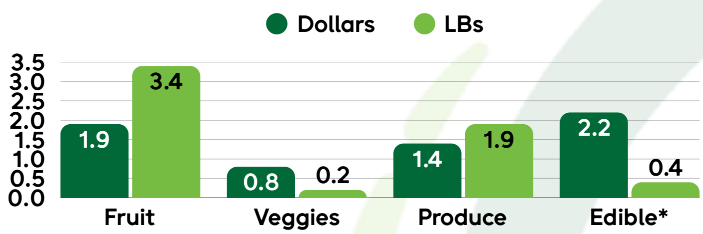
Quarterly produce performance

($ Sales % Chg. vs YA)



YTD through 13 weeks

($ & lbs % Chg. vs YA)



*Edible volume displayed in units

Regional performance YTD

(13 weeks)

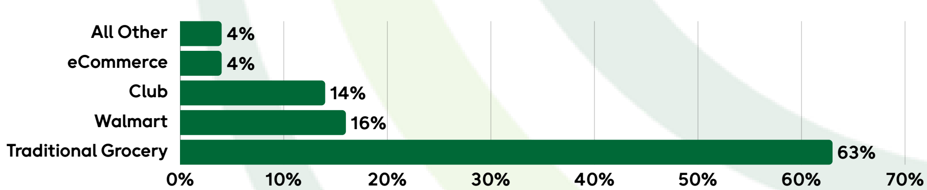
Region	$Share of produce	$ % Chg. vs 2025	Vol % Chg. vs 2025
Great Lakes	13.3	4.1	2.5
Plains	6.4	4.9	2.9
South Central	9.3	3.3	1.4
Southeast	15.8	3.9	1.8
Mid-South	12.9	3.9	2.4
West	12.8	2.3	1.1
Northeast	17.3	2.0	1.9
California	12.2	1.1	1.5

Consumer check-in

Channel shifting:

Traditional grocery continues to see challenges in the marketplace as the increasing popularity of eCommerce and convenience of Club stores rise. The trend continues into 2026, with produce seeing the largest dollar-share growth in internet sales.

$ Share of Market[2]



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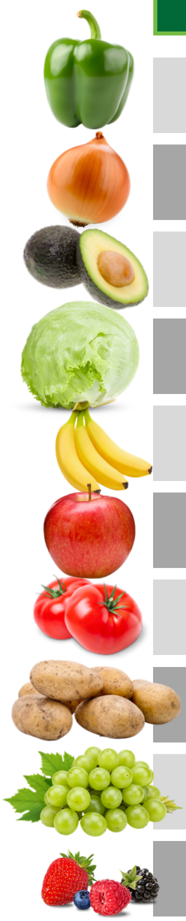
Top 10 fruits & vegetables YTD[3]

($Sales)



$ vs PY%	Vol vs PY%	$ Sales
-2.3	0.6	$761
-0.8	2.3	$796
-11.1	16.2	$804
5.6	-2.9	$830
2.1	0.4	$931
-2.7	-0.2	$990
0.3	-0.4	$1,129
-1.7	2.3	$1,252
5.5	5.7	$1,373
3.9	3.5	$3,261

$ Sales (Thousands)

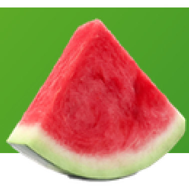
Summer is the peak season for fruit consumption because **prices drop, flavor improves,** and people crave refreshing, hydrating foods like melons, berries, and stone fruits.

Commodity spotlight: Melons

As the summer season approaches, melons are expected to gain prominence as a popular choice for family gatherings and seasonal events, offering a refreshing option as temperatures rise. Peak supply during this period will align with increased demand tied to the summer grilling season, while expanded availability of precut melon offering is likely to enhance consumer appeal further.

Global and U.S. data show that melon consumption surges by over 45% during summer months

Melons Performance[4]



$549M Sales, +9.4% vs YA
349M Lbs, +7.4% vs YA

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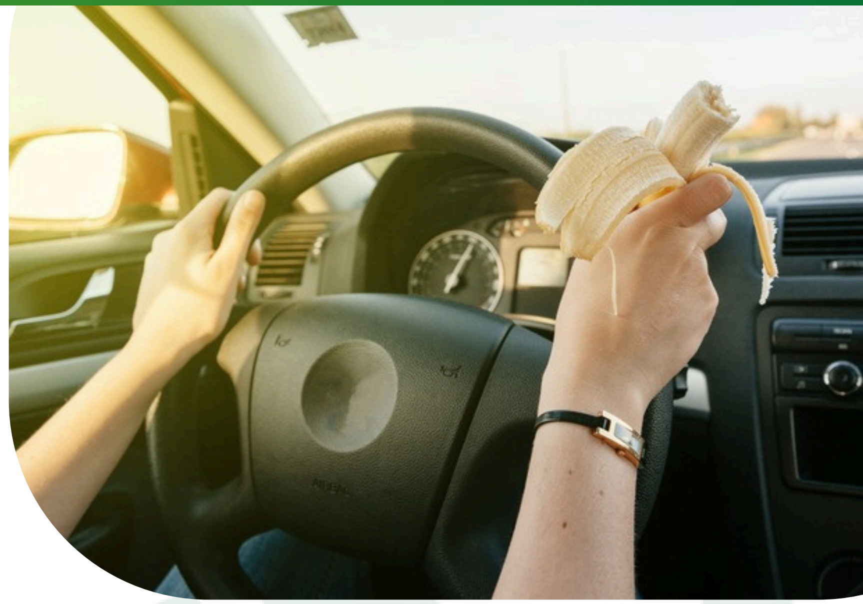
Q1 2026



Convenience has become the defining characteristic of the modern grocery experience

By integrating same-day delivery and curbside pickup, retailers have come to dominate an increasingly competitive landscape. Retailers' ability to replicate the in-store shopping experience through robust online platform sets them apart from many traditional grocery competitors.

Club stores have their recipe for modern success as well, taking advantage of bulk stock-up and competitive pricing. Customer loyalty remains at an all-time high at club stores.

70% of U.S. consumers use online grocery at least monthly (as of 2026)[7]

To remain competitive with club stores and mass retailers, traditional grocers must adapt by investing in advanced technologies. These investments include dynamic pricing capabilities, streamlined supply chain operations, and the development of a seamless and efficient digital presence.

Sources:

1. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 03/22/2026
2. Circana Integrated Fresh Scan Total US MULO+, L52 Weeks Ending 03/22/2026
3. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 03/22/2026
4. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 03/22/2026
5. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 03/22/2026
6. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 03/22/2026
7. WorldMetrics.org. Online Grocery Statistics. Online Grocery Statistics: Market Data Report 2026

Retail exclusive promotions remain one of the most common strategies traditional grocers use to retain repeat customers. "Members only" deals, in particular, provide retailers with opportunities to engage consumers more directly, foster long-term loyalty, and enhance the overall shopping experience.

Top promoted fruits[5] ($ Sales > $500M):

Strawberries
Mandarins
Avocados

Top promoted veggies[6] ($ Sales > $500M):

Cucumbers
Potatoes
Lettuce