

2025

FRESH MUSHROOM PURCHASE DYNAMICS

An in-depth look at fresh mushroom trips, purchase size and household penetration

DEVELOPED BY:

The Mushroom Council



mushroomcouncil.org

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Based on Circana, All outlets for calendar year 2024





Mushroom Household Penetration at Retail

The erosion of the number of mushroom buying households has been the primary reason for the volume decline at retail over the past few years. Household penetration reflects the share of households that have purchased fresh mushrooms in the produce department at least once in the past year. The total share of mushroom-consuming households is likely bigger, when taking into account mushrooms included in kabobs, deli-prepared dishes or stuffed mushrooms sold through the deli or meat departments. Foodservice is not accounted in these numbers.

Across all retail outlets, 47.8% of consumers purchase fresh mushrooms at least once, reflecting continued decline.

- White mushrooms have the highest household penetration but also the most erosion.
- Crimini/baby bella mushrooms have the second-highest household penetration with the share of households buying this type holding relatively steady over the past few years. Crimini sales have reflected better-than-average results and growing assortment, especially in organic.
- Portabellas are purchased by 8.7% of households, down 3.5% versus three years ago.
- Shiitake have the highest penetration of the small varieties, at 2.7%. However, it is likely that exotic mushrooms are purchased through other outlets that go unmeasured such as farmers' markets, specialty stores, Asian stores, etc.

Product	% HH Buying	% HH Buying Change vs YA	% HH Buying Change vs 2 YA	% HH Buying Change vs 3 YA
Produce department	99.0%	0.0%	0.1%	0.0%
Fresh vegetables	97.8%	-0.1%	-0.1%	-0.4%
Fresh cooking vegetables	89.6%	-0.2%	-0.7%	-1.5%
Fresh mushrooms	47.8%	-1.7%	-2.2%	-4.8%
White fresh mushrooms	35.1%	-1.4%	-2.4%	-5.0%
Crimini/brown fresh mushrooms	24.7%	-0.2%	0.4%	-0.5%
Portabella fresh mushrooms	8.7%	-0.7%	-2.1%	-3.5%
Random weight fresh mushrooms	7.2%	-0.7%	-1.2%	-2.4%
Shiitake fresh mushrooms	2.7%	-0.1%	-0.4%	-0.6%
Mixed fresh mushrooms	1.0%	0.1%	0.0%	-0.3%
All other fresh mushrooms	0.8%	0.0%	0.0%	-0.1%
Oyster fresh mushrooms	0.7%	--	--	--
Chanterelle fresh mushrooms	0.2%	--	--	--

Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024

Mushroom Trips per Buyer at Retail

While the total produce department is experiencing an increase in the number of times consumers purchase fresh fruit and vegetables, mushroom trips have only seen a small increase over the past year, and are down compared to two and three years ago.

- Consumers who buy mushrooms, buy them an average of nearly eight times per year.
- The trip pressure is primarily driven by white mushrooms, which are purchased disproportionately by light consumers who have been more likely to exit the category.
- Crimini/brown mushrooms have seen an increase in trips over all three years.
- Portabella and shiitake are other mushroom types with an increase in the purchase frequency. This means while fewer people purchase portabella mushrooms, those who do purchase them more frequently.

Product	Product Trips per Buyer	Product Trips per Buyer Change vs YA	Product Trips per Buyer % Change vs YA	Product Trips per Buyer % Change vs 2 YA	Product Trips per Buyer % Change vs 3 YA
Produce department	84.3x	+2.7	+3.3%	+4.7%	+7.0%
Fresh vegetables	57.4x	+1.6	+2.8%	+3.3%	+4.5%
Fresh cooking vegetables	21.7x	+0.6	+3.0%	+4.4%	+5.6%
Fresh mushrooms	7.8x	+0.1	+0.8%	-0.9%	-3.5%
White fresh mushrooms	5.7x	+0.0	+0.7%	-0.8%	-3.4%
Crimini/brown fresh mushrooms	4.7x	+0.0	+0.6%	+0.5%	+2.9%
Portabella fresh mushrooms	3.4x	+0.1	+1.6%	+2.6%	+2.3%
Random weight fresh mushrooms	2.1x	+0.0	+1.7%	+0.7%	-3.6%
Shiitake fresh mushrooms	3.1x	-0.1	-3.3%	+10.6%	+14.2%
Mixed fresh mushrooms	2.1x	-0.1	-2.6%	+0.5%	-0.8%
All other fresh mushrooms	1.7x	-0.1	-5.5%	+8.3%	-11.6%
Oyster fresh mushrooms	1.6x	-0.1	-5.2%	-5.4%	-12.3%
Chanterelle fresh mushrooms	2.0x	--	--	--	--

Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024



Mushroom Dollars per Trip at Retail

Fresh mushroom spending per trip is flat. Longer-term, there is a bit of an increase, which can be related to a move to larger pack sizes among core mushroom consumers but inflation plays a role in that as well.

- On average, shoppers spend \$3.29 on mushroom per buying visit — in line with cooking vegetables.
- The amount is highest for chanterelle, followed by mixed fresh mushrooms and Shiitake.
- Crimini is also an above-average spend, at \$3.67 versus \$2.91 for white mushrooms.

Product	Dollars per Trip	Dollars per Trip Change vs YA	Dollars per Trip % Change vs YA	Dollars per Trip Change vs 2 YA	Dollars per Trip % Change vs 2 YA	Dollars per Trip Change vs 3 YA	Dollars per Trip % Change vs 3 YA
Produce department	\$9.06	+\$0.03	+0.3%	+\$0.09	+1.0%	+\$0.41	+4.7%
Fresh vegetables	\$6.38	-\$0.04	-0.6%	+\$0.03	+0.5%	+\$0.28	+4.5%
Fresh cooking vegetables	\$3.18	+\$0.04	+1.4%	+\$0.05	+1.4%	+\$0.28	+9.6%
Fresh mushrooms	\$3.29	+\$0.01	+0.2%	+\$0.04	+1.1%	+\$0.22	+7.3%
White fresh mushrooms	\$2.91	+\$0.01	+0.2%	+\$0.02	+0.8%	+\$0.20	+7.3%
Crimini/brown fresh mushrooms	\$3.67	-\$0.04	-1.0%	-\$0.03	-0.8%	+\$0.18	+5.1%
Portabella fresh mushrooms	\$3.07	+\$0.00	+0.1%	-\$0.04	-1.2%	+\$0.04	+1.2%
Random weight fresh mushrooms	\$2.98	+\$0.04	+1.5%	+\$0.09	+3.2%	+\$0.28	+10.4%
Shiitake fresh mushrooms	\$6.11	+\$0.13	+2.2%	+\$0.13	+2.2%	+\$0.53	+9.6%
Mixed fresh mushrooms	\$6.31	+\$0.42	+7.2%	+\$1.32	+26.5%	+\$1.58	+33.4%
All other fresh mushrooms	\$4.53	-\$0.23	-4.8%	+\$0.43	+10.4%	+\$0.75	+19.7%
Oyster fresh mushrooms	\$5.43	+\$0.10	+1.8%	+\$0.44	+8.8%	+\$1.37	+33.8%
Chanterelle fresh mushrooms	\$15.19	--	--	--	--	--	--

Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024



Mushroom Units per Trip at Retail

Most mushroom buying trips include one package/unit of mushrooms per visit. Because of this, the changes over time are miniscule even if the percentages reflect some increases or decreases.

Product	Unit Sales per Trip	Unit Sales per Trip % Change vs YA	Unit Sales per Trip % Change vs 2 YA	Unit Sales per Trip % Change vs 3 YA
Produce department	3.1	-0.9%	-2.2%	-5.8%
Fresh vegetables	2.4	-1.2%	-2.4%	-6.0%
Fresh cooking vegetables	1.3	-0.7%	-0.8%	-2.4%
Fresh mushrooms	1.2	-0.8%	+0.5%	-1.1%
White fresh mushrooms	1.2	-1.2%	+0.5%	-0.7%
Crimini/brown fresh mushrooms	1.1	+0.2%	+0.1%	-1.7%
Portabella fresh mushrooms	1.3	-1.7%	+3.6%	+1.3%
Random weight fresh mushrooms	1.1	-0.1%	-0.2%	+0.0%
Shiitake fresh mushrooms	1.2	-0.2%	-0.3%	-0.7%
Mixed fresh mushrooms	1.1	-0.8%	-0.1%	-0.7%
All other fresh mushrooms	1.4	-0.6%	+7.2%	+1.4%
Oyster fresh mushrooms	1.3	-8.7%	+6.0%	+1.2%
Chanterelle fresh mushrooms	1.1	--	--	--

Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024



Mushroom Annual Spend per Buyer at Retail

Combining household penetration, trips and purchase size shows that mushrooms have fallen behind total produce and vegetables in terms of gains in dollars per buyer per year. Shoppers spend about \$26 per year on fresh mushrooms. This is largely unchanged from last year or the two prior years. In contrast, consumers spent \$82 more on produce in 2024 than they did in 2021. Likewise, they are spending \$31 extra on vegetables.

- Crimini/brown mushrooms average annual spend now exceeds that of white mushrooms, at \$17.13. However, it is important to keep in mind that white mushrooms still have a higher household penetration.
- Shiitake, though purchased by a very small share, have the highest annual spend, at \$19.15.
- White mushrooms are the third-highest and have the highest household penetration and trip frequency.

Product	Dollars per Buyer	Dollars per Buyer Change vs YA	Dollars per Buyer % Change vs YA	Dollars per Buyer Change vs 2 YA	Dollars per Buyer % Change vs 2 YA	Dollars per Buyer Change vs 3 YA	Dollars per Buyer % Change vs 3 YA
Produce department	\$763.40	+\$26.34	+3.6%	+\$41.39	+5.7%	+\$82.20	+12.1%
Fresh vegetables	\$366.49	+\$7.68	+2.1%	+\$13.30	+3.8%	+\$31.10	+9.3%
Fresh cooking vegetables	\$68.91	+\$2.92	+4.4%	+\$3.82	+5.9%	+\$9.40	+15.8%
Fresh mushrooms	\$25.66	+\$0.24	+1.0%	+\$0.04	+0.1%	+\$0.88	+3.5%
White fresh mushrooms	\$16.45	+\$0.14	+0.9%	+\$0.01	+0.1%	+\$0.57	+3.6%
Crimini/brown fresh mushrooms	\$17.13	-\$0.07	-0.4%	-\$0.06	-0.4%	+\$1.28	+8.1%
Portabella fresh mushrooms	\$10.50	+\$0.18	+1.8%	+\$0.14	+1.4%	+\$0.35	+3.5%
Random weight fresh mushrooms	\$6.38	+\$0.20	+3.3%	+\$0.24	+4.0%	+\$0.38	+6.4%
Shiitake fresh mushrooms	\$19.15	-\$0.23	-1.2%	+\$2.21	+13.1%	+\$3.85	+25.1%
Mixed fresh mushrooms	\$13.08	+\$0.55	+4.4%	+\$2.79	+27.1%	+\$3.19	+32.3%
All other fresh mushrooms	\$7.65	-\$0.85	-10.0%	+\$1.25	+19.6%	+\$0.42	+5.8%
Oyster fresh mushrooms	\$8.57	-\$0.31	-3.5%	+\$0.24	+2.9%	+\$1.27	+17.4%
Chanterelle fresh mushrooms	\$30.39	--	--	--	--	--	--

Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024