

2025

PRODUCE PURCHASE DYNAMICS

Comparing fresh mushroom trips, purchase size and household penetration trends to the changes in other commodities

DEVELOPED BY:

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mushroomcouncil.org

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Based on Circana, All outlets for calendar year 2024

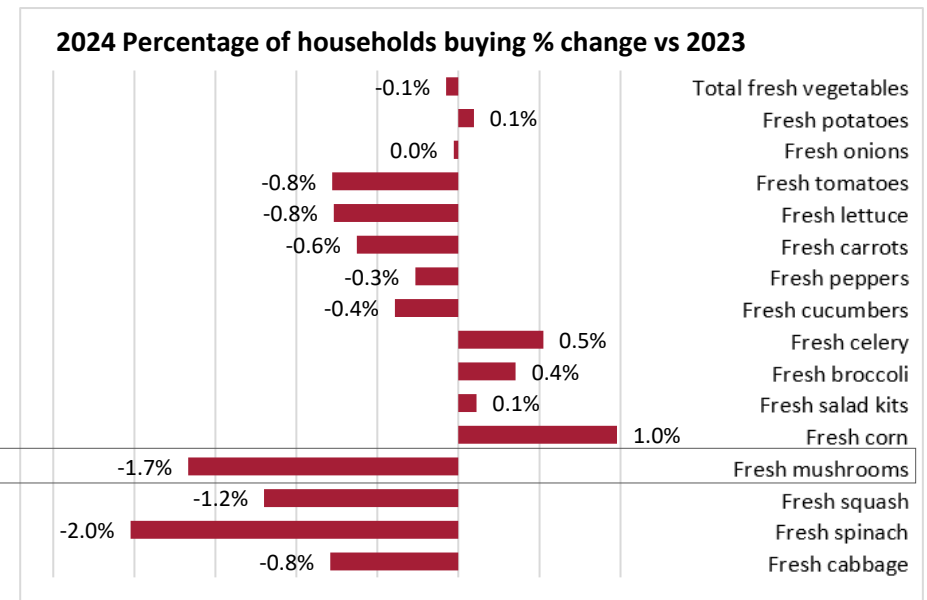
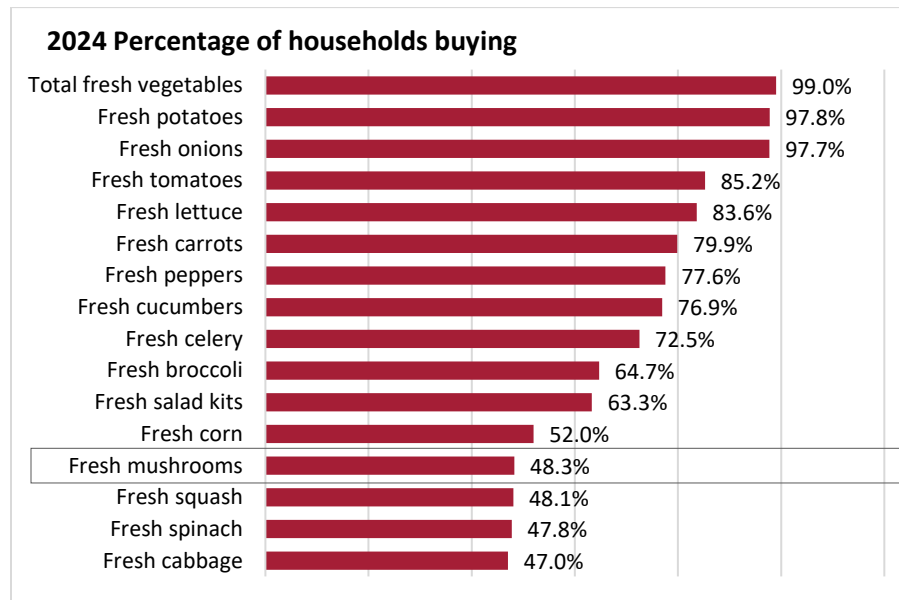


Vegetable Purchase Dynamics in 2024

Every department, category or item ultimately has three ways in which it can grow sales: an increase in the number of people who purchase the item, an increase in the number of times it is purchased, and an increase in the trip spend by buying more units, a larger size or a more expensive item. In 2024, the price per unit across all food and beverages at retail increased a mild 1.7%. However, the 35% cumulative increase in the average price per unit across food and beverages since 2019 continued to pressure consumers' spending power. In response, shoppers applied widespread money-saving measures led by seeking out promotions, avoiding non-essentials and limiting fresh food waste.

Household penetration

Out of the top 15 sellers in fresh vegetables, only five commodities increased household penetration year-over-year. Corn had the strongest growth, which was related to a much larger crop and lower prices than in 2023. The same is true for potatoes. Declines among the other commodities ranged from -0.1% to -2.0%. Fresh mushrooms had the second-highest year-on-year decline, at -1.7%. Compared to three years ago mushrooms had the highest rate of decrease, at -4.8%. This is followed by celery (-3.1%), carrots (-2.9%) and corn (-2.7%).

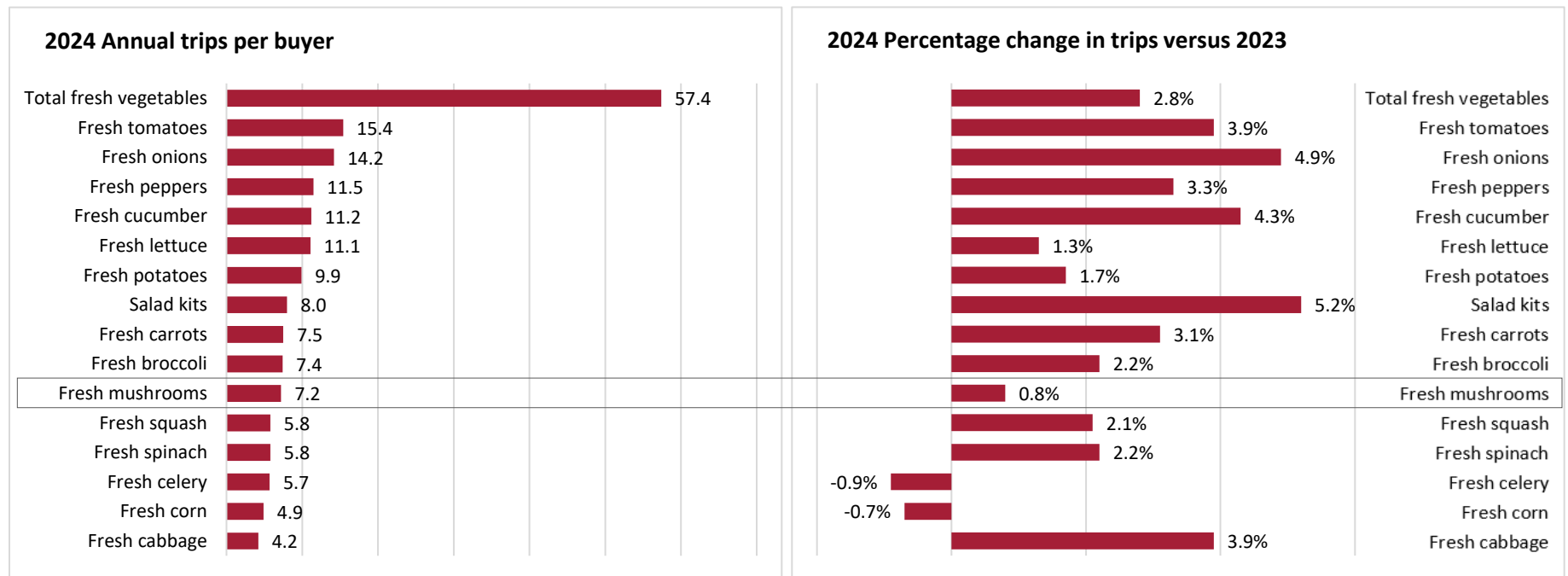


Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024

Annual trips per Buyer

Households who bought fresh mushrooms at least once in 2024 did not substantially decrease or increase the number of times they bought them. These households purchased fresh mushrooms an average of 7.2 times per year, which was virtually unchanged, at +0.8% or +0.1 trips. Mushrooms have among the lower number of annual trips compared to other commodities. Sales powerhouses such as tomatoes and onions averaged more than 14 transactions in 2024.

Only two commodities experienced trip decline in 2024, being celery and corn. Commodities with below-average increases in comparison to total vegetables include lettuce, potatoes, broccoli, mushrooms, squash and spinach.

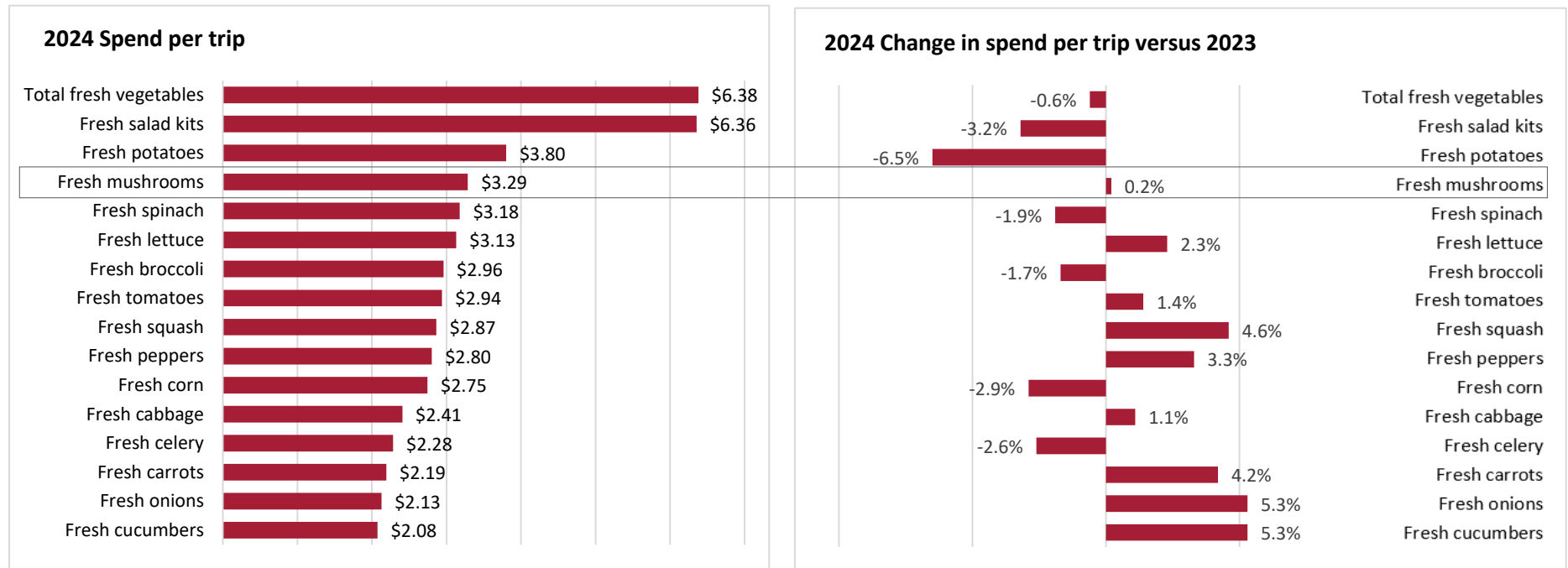


Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024

Dollars per Trip

The average spend per trip by commodity was heavily influenced by inflation and deflation. The average price per pound across all vegetables, as well as commodities such as potatoes, decreased, in turn pulling down the average transaction size. In contrast, consumers spent more per trip on onions, cucumbers, squash and carrots in 2024.

Mushroom households spent an average of \$3.29 per trip on fresh mushrooms in 2024. This was virtually unchanged from 2023. This means that neither trip frequency nor the spend per trip were a substantial driver behind the decreases seen in the 2024 dollar and volume performance.

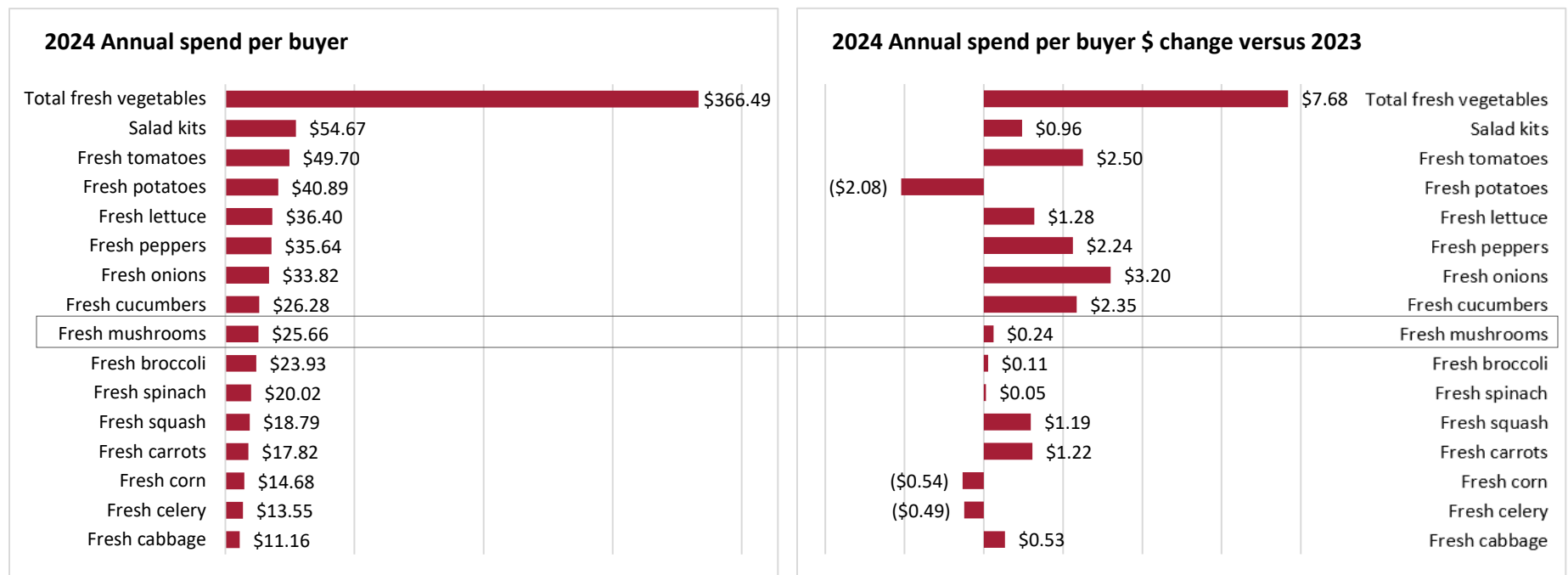


Source: Circana, Integrated Fresh Household Panel, all outlets, 52 weeks ending 12/29/2024

Annual spend per buyer

Consumers spent \$7.68 more on fresh vegetables in 2024 compared to 2023. This reflects an increase of 2.1% despite deflationary conditions. Commodities with the highest gains include onions, tomatoes, cucumbers and peppers. The three that lost ground in the annual spend per buying household all experienced substantial deflation.

The 48.3% of U.S. households who purchased fresh mushrooms at least once in 2024 spent \$0.24 more than they did in 2023. This reflects an increase of just 1%.



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

Conclusion

The number of times consumers purchased fresh mushrooms and the average transaction size were virtually unchanged in 2024. This means the dollar, unit and volume decline continued to be driven by fewer households purchasing fresh mushrooms.

2024 Fresh Mushroom Performance Summary

In calendar year 2024, dollars were down 1.9% and pounds 2.6% compared to their 2023 levels.

Fresh mushrooms	CY 2024	Vs. 2023	Vs. 2021
Dollars	\$1.517B	-1.9%	-4.5%
Units	500.1M	-2.8%	-12.7%
Volume (pounds)	333.6M	-2.6%	-12.3%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 12/29/2024

Mushroom prices per unit increased a slight 0.9% compared to 2023 and 2.5% compared to 2021.

Fresh mushrooms	CY 2024	Vs. 2023	Vs. 2021
Price/unit	\$2.96	+0.9%	+2.5%
Price/volume	\$4.55	+0.7%	+2.0%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 12/29/2024