

Insights to Action

Q4 2026



Demand is stabilizing

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Get back to promoting

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2027 outlook

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Produce demand is beginning to stabilize as consumer sentiment improves.

While value remains a priority, shoppers continue to emphasize quality, food safety, and supply assurance. Retailers can capitalize on seasonal demand and finish the year strong through targeted holiday promotions.

Looking ahead to 2027, produce demand is expected to strengthen as category volatility eases and consumer sentiment continues to improve. While value will remain a key priority, consumers will adapt their shopping behaviors in ways that balance affordability, quality, convenience, and food safety.

Produce at a glance¹

Produce YTD - U.S. multi-outlet



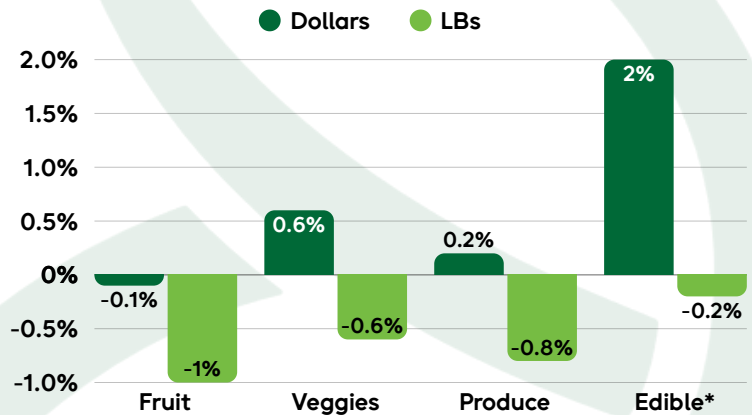
+0.2% vs 2025



-0.8% vs 2025

2026 YTD

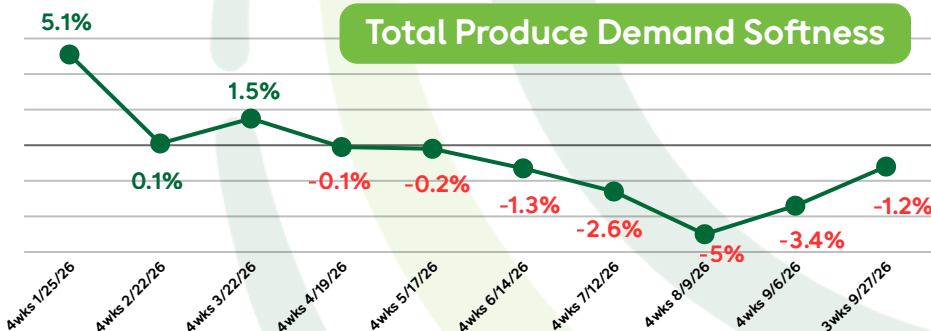
(\$ & lbs % Chg. vs YA)



Consumer demand & market trends²

Produce demand is beginning to stabilize as consumer sentiment improves

While shoppers remain value-focused and selective in their purchases, confidence is gradually returning. Food safety, quality, consistency, and supply assurance continue to be key drivers of purchase decisions, creating opportunities for retailers that deliver both value and differentiation.



Consumer confidence is improving, supporting gradual demand recovery.

Economic pressures that existed prior to Cyclospora continue to weigh on the category as it recovers.

Stock-Up Trip Tug-of-War⁴

WHAT'S PULLING SHOPPERS TOWARD CLUB STORES AND
HOW GROCERY CAN WIN BACK THE TRIP

Club stores win stock-up trips on value, but shoppers rarely commit to just one

Membership spans multiple clubs and digital services

The real competition isn't for the shopper. It's for the trip.

Club stores are attracting more planning stock-up trips through value-driven offerings, yet grocery retains meaningful advantages in freshness, flexibility, and pack-size relevance. Understanding what pulls shoppers toward club stores and where grocery can still win creates a clear roadmap for recapturing trips and strengthening shopper engagement.

How club stores capture trips



44%

cite lower prices as a reason for buying produce at a club store



73%

club-store produce purchases are planned



38%

have reduced traditional grocery trips since joining a club

How grocery wins back the trip



47%

indicate that loyalty member pricing can create club-like value



71%

respond well to mix-and-match bundles & promotions



74%

prefer not to buy bulk packs, instead favoring smaller pack sizes



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Q3 2026

Robinson Fresh perspectives: Produce in 2027

Fresh produce is positioned for modest growth in 2027 as consumer confidence improves and demand strengthens across key categories. Shoppers will remain selective about where and how they spend, rewarding retailers that deliver meaningful value, relevant nutrition, seamless convenience, and a differentiated shopping experience.



Produce is **expected to grow 2% to 3% in 2027**, but capturing that growth will require a deeper understanding of shopper needs.



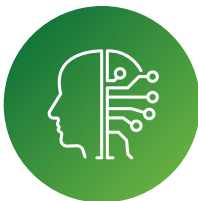
Value will remain essential, but shoppers will evaluate it differently—**weighing bulk savings, price per pound, and total basket cost.**



Consumers will **increasingly shop across channels** in search of better price, greater convenience, and product selection.



As GLP-1 adoption grows, produce is well positioned as **consumers eat less but prioritize protein, fiber, and nutrient-dense foods** like fruits and vegetables.



AI tools and subscription services will **fuel the next wave of ecommerce growth**, making product discovery easier and everyday purchases effortless.



Renewed consumer confidence will unlock pent-up demand, create new shopping occasions, and reenergize fresh produce growth.

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+, Building Calendar Year Ending 09.27.2026

2. Circana Integrated Fresh Scan Total US MULO+, 2026 – Building 13 Weeks Ending 09.27.2026

3. Circana Integrated Fresh Scan Total US MULO+, Building Calendar Year Ending 09.27.2026

4. Robinson Fresh Primary Research: The Impact of Club Stores on Traditional Grocery, Numerator | Sep. 16, 2026 | n=205



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