

# TEN-YEAR TRENDS IN FRESH MUSHROOM SALES



## A Longer-Term Look at Fresh Mushroom Sales Trends

A look at fresh mushroom sales trends over a 10-year span provides a much cleaner look compared to the patterns of the past few years. Since March of 2020, the combination of the pandemic and substantial inflation has fundamentally altered consumers' food buying and consumption habits.

### Dollar Sales at Retail

Traditionally, mushroom sales have been fairly evenly split between restaurants and grocery stores (retail). Fresh mushroom sales total \$1.3 billion annually through the produce department alone, reflecting an increase of \$211 million or 19.9% in the 10-year span. In addition, grocery stores sell mushrooms as part of kabobs, vegetable mixes, deli-prepared pizzas, stuffed mushrooms and more (not included in these numbers).

Dollar sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total mushrooms	\$1.057B	\$1.268B	+\$210.8M	+19.9%

Source: Circana (formerly IRI), MULO, Total US

While white mushrooms remain the largest seller in retail, the 10-year comparison shows substantial shifts in sales by type. There has been a long-term shift from white buttons to crimini/baby bellas and portabellas.

- In 2013, white button mushrooms made up 66% of total mushroom retail dollars. Ten years later, this share is down to 52%.
- Brown mushrooms, the combination of crimini and portabellas, increased from 30% of fresh mushroom dollar sales in 2013 to 42% in 2023. Brown mushrooms gained nearly \$213 million in sales, reflecting an increase of 67.4%.
- Specialty is still a small part of total mushroom sales but more than doubled to 5.8% in 2023. Off a small base, this reflects an increase of 105.7% over the past 10 years. Specialty mushrooms high growth is predominantly driven by shiitake mushrooms.

Dollar sales and shares	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total white mushrooms	\$696.4M	\$665.5M	(\$30.9M)	-4.4%
Total brown mushrooms	\$315.6M	\$528.4M	+\$212.8M	+67.4%
Total specialty mushrooms	\$35.8M	\$73.6M	+\$37.8M	+105.7%
White \$ share	66%	52%	-1 pts	-20.3%
Brown \$ share	30%	42%	+12 pts	+39.6%
Specialty \$ share	3%	6%	+2.5 pts	+71.5%

Source: Circana (formerly IRI), MULO, Total US

### Pound Sales at Retail

U.S. grocery stores sell more than 270 million pounds of fresh mushrooms every year. This is an increase of nearly 4 million pounds over the past 10 years.

Pound sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total mushrooms	266.5M	270.3M	+3.9M	+1.5%

Source: Circana (formerly IRI), MULO, Total US

The shift from white mushrooms to brown and specialty can also be seen in pounds.

- Grocery retailers sell about 30 million fewer pounds of white mushrooms than they did 10 years ago and instead are moving more than 33 million additional pounds of brown mushrooms, including crimini and portabellas.
- This reduces the white mushroom share of pounds to 60%, from 72% in 2013, and increases the shares of brown mushrooms to 38%.
- While the share of specialty pounds is still small, at 2%, this has doubled in the past 10 years.

Pound sales and shares	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total white mushrooms	192.2M	162.1M	(\$30.2M)	-15.7%
Total brown mushrooms	69.5M	102.9M	+33.4M	+48.0%
Total specialty mushrooms	3.3M	5.4M	+2.1M	+62.9%
White lbs share	72%	60%	-12 pts	-16.9%
Brown lbs share	26%	38%	+12 pts	+45.9%
Specialty lbs share	1%	2%	+1 pt	+60.5%

Source: Circana (formerly IRI), MULO, Total US

## Growth by Segment

Crimini mushrooms drove the majority of growth in the past 10 years, reflecting an addition \$204 million in crimini mushrooms sold over the past 10 years.

Dollar sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total fresh mushrooms	\$1.057B	\$1.268B	+\$210.8M	+19.9%
White	\$696M	\$665.5M	(\$30.9M)	-4.4%
Crimini	\$224.9M	\$429.3M	+\$204M	90.9%
Portabella	\$90.8M	\$99.2M	+\$8.4M	9.3%

Source: Circana (formerly IRI), MULO, Total US

In volume, grocery retailers are selling 36 million more pounds of crimini mushrooms now than they did in 2013.

Pound sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% change
Total fresh mushrooms	266.5M	270.3M	+3.9M	+1.5%
White	192.2M	162.1M	-30.2M	-15.7%
Crimini	51.6M	87.6M	+36.0M	+69.8%
Portabella	18.1M	15.4M	-2.6M	-14.5%

Source: Circana (formerly IRI), MULO, Total US

## Regional Fresh Mushroom Dollar Sales at Retail

Regional differences in the 10-year growth trends are substantial. The West and Midsouth lead all regions when comparing their 2013 and 2023 shares of dollar sales. The West increased its share by 2.6 percentage points and the Midsouth increased by 1.4 points. The Northeast experienced the largest drop in share over the past 10 years, at -2.8 percentage points, though remains the largest-selling region.

### Top 3 selling regions in dollars:

<u>2013</u>	<u>2023</u>
Northeast	Northeast
Great Lakes	West
Southeast	Great Lakes



### Top contributors to the 10-year mushroom \$ growth:

1. West
2. Midsouth
3. Great Lakes

Dollar sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference in dollars	% Change	Share of 2013 sales	Share of 2023 sales
<b>Total mushrooms</b>	<b>\$1.057B</b>	<b>\$1.268B</b>	<b>+\$210.8M</b>	<b>+19.9%</b>	<b>100.0%</b>	<b>100.0%</b>
California	\$129.2M	\$157.5M	+\$28.3M	+21.9%	12.2%	12.4%
Great Lakes	\$150.9M	\$190.4M	+\$39.4M	+26.1%	14.3%	▲ 15.0%
Midsouth	\$110.9M	\$150.8M	+\$39.9M	+36.0%	10.5%	▲ 11.9%
Northeast	\$220.4M	\$228.3M	+\$7.9M	+3.6%	20.9%	▼ 18.0%
Plains	\$73.2M	\$80.5M	+\$7.2M	+9.9%	6.9%	▼ 6.3%
South Central	\$94.6M	\$91.5M	-\$3.1M	-3.3%	9.0%	▼ 7.2%
Southeast	\$141.5M	\$172.2M	+\$30.7M	+21.7%	13.4%	13.6%
West	\$136.1M	\$196.4M	+\$60.3M	+44.3%	12.9%	▲ 15.5%

Source: Circana (formerly IRI), MULO, Total US and the nine Circana regions (see map)

## Regional Fresh Mushroom Pound Sales at Retail

Different rates of inflation played a role in the shifting dollar contributions. Volume sales, a measure unaffected by price changes, shows fewer pounds being sold in 2023 than in 2013 in California, the Northeast, the Plains and South Central. In contrast, mushroom pounds sold in the Midsouth and Southeast have increased by more than 20%.

### Top 3 selling regions in dollars:

<u>2013</u>	<u>2023</u>
Northeast	Northeast
Great Lakes	Southeast
Southeast	Great Lakes

### Top contributors to the 10-year mushroom pound growth:

1. Southeast
2. Midsouth
3. West

Pound sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference in pounds	% Change	Share of 2013 sales	Share of 2023 sales
<b>Total US</b>	<b>266.5M</b>	<b>270.3M</b>	<b>+3.9M</b>	<b>+1.5%</b>	<b>100.0%</b>	<b>100.0%</b>
California	30.9M	29.2M	-(1.8M)	-5.7%	11.6%	▼ 10.8%
Great Lakes	39.5M	39.5M	+36K	+0.1%	14.8%	▲ 14.6%
Midsouth	27.1M	32.9M	+5.8M	+21.6%	10.2%	▲ 12.2%
Northeast	57.1M	47.8M	-(9.2M)	-16.3%	21.4%	▼ 17.7%
Plains	19.1M	16.8M	-(2.2M)	-11.6%	7.2%	▼ 6.2%
South Central	23.5M	22.4M	-(1.1M)	-4.8%	8.8%	▼ 8.3%
Southeast	35.0M	44.3M	+9.4M	+26.8%	13.1%	▲ 16.4%
West	34.3M	37.3M	+3.0M	+8.8%	12.9%	▲ 13.8%

Source: Circana (formerly IRI), MULO, Total US and the nine Circana regions (see map)

## Inflation by Region — Price per Pound

The Consumer Price Index has increased 32.1% between 2013 and 2023, according to the Bureau of Labor Statistics. Fresh mushrooms have seen far less inflation. The price per pound increased by 18.2% over the past 10 years, with the regions ranging from -4.0% for the Southeast to +29.2% for California.

	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% Change
<b>Total US</b>	<b>\$3.97</b>	<b>\$4.69</b>	<b>+\$0.72</b>	<b>+18.2%</b>
California	\$4.18	\$5.40	+\$1.22	+29.2%
Great Lakes	\$3.82	\$4.81	+\$0.99	+26.0%
Midsouth	\$4.09	\$4.58	+\$0.49	+11.9%
Northeast	\$3.86	\$4.78	+\$0.92	+23.7%
Plains	\$3.84	\$4.78	+\$0.94	+24.3%
South Central	\$4.02	\$4.08	+\$0.06	+1.6%
Southeast	\$4.05	\$3.88	-\$0.16	-4.0%
West	\$3.96	\$5.26	+\$1.30	+32.7%

Source: Circana (formerly IRI), MULO, Total US and the nine Circana regions (see map)

## Inflation by Region — Price per Unit

On a per unit basis, mushroom prices increased 20.9% over the past 10 years, with the average price per purchase increasing to \$2.96 across types and regions. In part, the growing share of brown and specialty mushrooms also fuels this increase.

	52 w.e. 9/8/2013	52 w.e. 9/10/2023	Difference	% Change
<b>Total US</b>	<b>\$2.34</b>	<b>\$2.96</b>	<b>+\$0.62</b>	<b>+20.9%</b>
California	\$2.46	\$3.24	+\$0.78	+24.0%
Great Lakes	\$2.22	\$2.97	+\$0.75	+25.3%
Midsouth	\$2.31	\$2.74	+\$0.43	+15.8%
Northeast	\$2.40	\$3.03	+\$0.64	+21.0%
Plains	\$2.25	\$2.97	+\$0.72	+24.3%
South Central	\$2.47	\$2.71	+\$0.23	+8.6%
Southeast	\$2.36	\$2.72	+\$0.35	+12.9%
West	\$2.25	\$3.21	+\$0.96	+29.9%

Source: Circana (formerly IRI), MULO, Total US and the nine Circana regions (see map)

## Sliced versus Whole Fresh Mushrooms

In white mushrooms, the share of sliced has increased from 44% in 2023 to 48% in 2023. In browns, the growth of sliced is even more pronounced, with the share of sliced reaching 51.4%. This goes hand-in-hand with 90% growth in dollars.

Dollar sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	2013 share	2023 share	Difference	% change
<b>Total white</b>	<b>\$696.4M</b>	<b>\$664.5M</b>	<b>100.0%</b>	<b>100.0%</b>	<b>-\$30.9M</b>	<b>-4.4%</b>
White sliced	\$308.5M	\$321.7M	44.3%	48.4%	+\$13.2M	+4.3%
White whole	\$387.9M	\$343.8M	55.7%	51.6%	-\$44.1M	-11.4%
<b>Total Brown</b>	<b>\$315.6M</b>	<b>\$528.4M</b>	<b>100.0%</b>	<b>100.0%</b>	<b>+\$212.8M</b>	<b>+67.4%</b>
Brown sliced	\$143.0M	\$271.4M	45.3%	51.4%	\$128.4M	+89.8%
Brown whole	\$172.7M	\$257.2M	54.7%	48.6%	\$84.4M	+48.9%

The same patterns can be observed in sliced versus whole mushroom pound sales. Sliced white mushrooms represent 47.4% of volume sales, up from 41.7%. In browns, the sliced share has increased to 47.2% in 2023.

Pound sales	52 w.e. 9/8/2013	52 w.e. 9/10/2023	2013 share	2023 share	Difference	% change
<b>Total white</b>	<b>192.2M</b>	<b>162.1M</b>	<b>100.0%</b>	<b>100.0%</b>	<b>(30,165,678)</b>	<b>-15.7%</b>
White sliced	80.2M	76.8M	41.7%	47.4%	(3,458,566)	-4.3%
White whole	112.0M	85.3M	58.3%	52.6%	(26,707,112)	-23.8%
<b>Total Brown</b>	<b>69.5M</b>	<b>102.9M</b>	<b>100.0%</b>	<b>100.0%</b>	<b>33,374,880</b>	<b>48.0%</b>
Brown sliced	29.7M	48.6M	42.7%	47.2%	18,928,931	63.8%
Brown whole	39.9M	54.3M	57.3%	52.8%	14,445,949	36.2%

Source: Circana (formerly IRI), MULO, Total US