

2024

# ORGANIC FRESH MUSHROOM SALES

An in-depth look at the sales and performance of organic produce, vegetables and mushrooms in comparison to the total market, including regional insights

DEVELOPED BY:  
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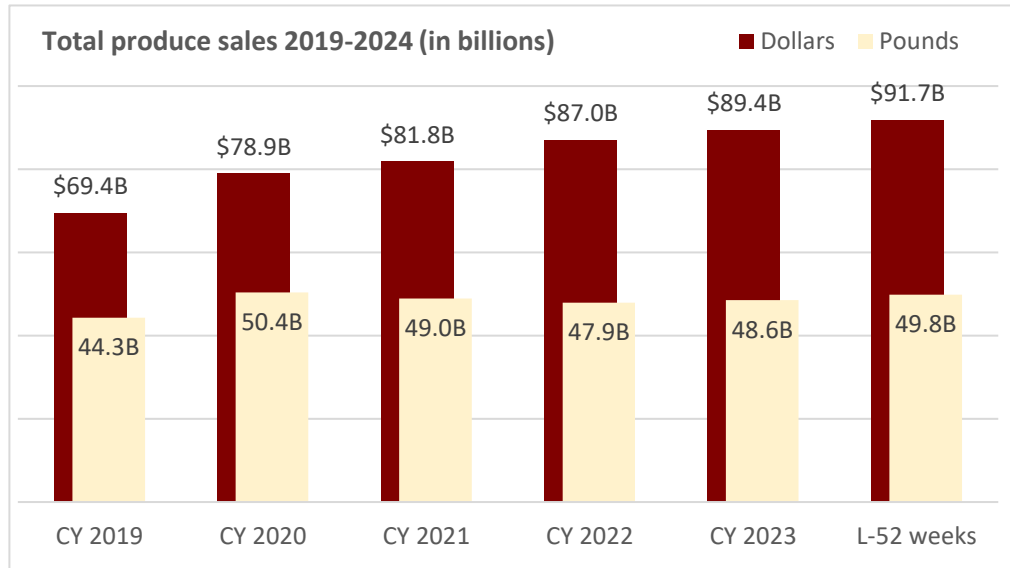
[mushroomcouncil.org](https://mushroomcouncil.org)  
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Based on Circana, MULO+ for the 52 w.e. 9/8/2024



# Organic Mushroom Trends in the U.S. Marketplace

## The Marketplace

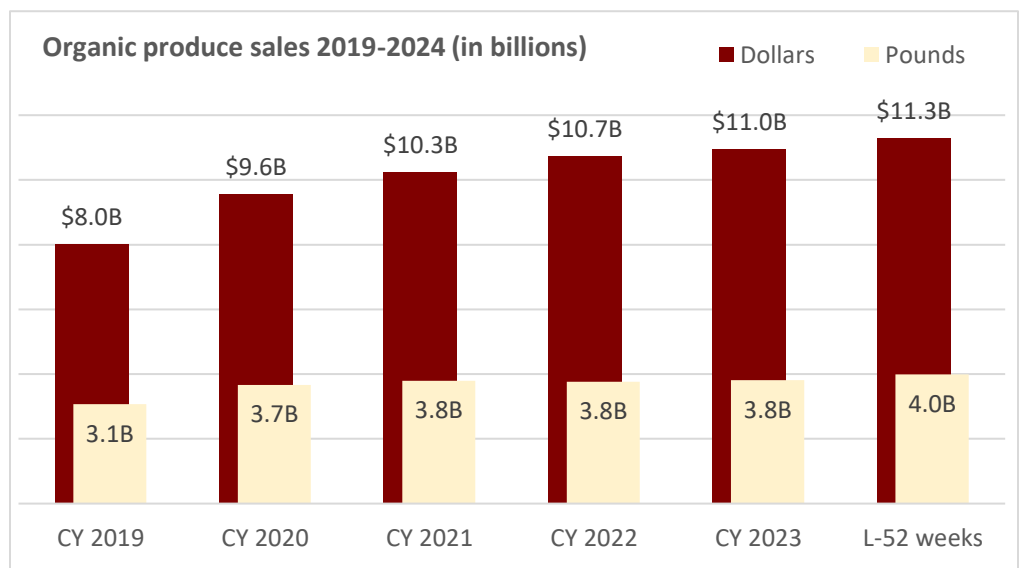
Between 2021 and 2022, fresh produce grew dollar sales, but pound sales decreased year-over-year. Dollars were boosted by inflation, while pounds decreased due to some meal occasions moving back to foodservice and consumers focusing on buying less to save. The cumulative impact of inflation continues to have a profound impact on grocery shopping patterns today. Ever since the second half of



Source: Circana, Integrated Fresh, Total US, MULO+ 52 weeks ending 9/8/2024

2023, consumers are visiting the grocery store more often to replace restaurant meals, capitalize on sales specials and minimize food waste. The extra trips to the store have been a positive for the produce department that delivered dollar and pound growth in 2023 and the latest 52 weeks. In fact, the produce department has emerged as the strongest growth area of the fresh perimeter this year.

Organic produce sales are not immune to this economic pressure and while dollar sales continued to grow, volume sales were largely unchanged between 2021 and 2023. Core organic shoppers, who skew toward being higher-income consumers, continued to purchase organic produce despite inflationary pressures. The lack of volume growth came from missing out on



Source: Circana, Integrated Fresh, Total US, MULO+ 52 weeks ending 9/8/2024

shoppers who purchased organic only occasionally or for certain items only. Organic produce dollar sales reached \$11.3B in the latest 52 weeks ending September 8, 2024. Over the past year, organic produce pounds grew by 6.2% versus conventional produce pounds increasing by 2.8%.

Looking at the latest 52 weeks of sales, organic fresh produce sales represented 12.3% of dollar sales and 8.0% of pound sales, due to an above-average price per pound. Vegetables have an above-average share of organic sales, at 14.9% of dollars and 8.4% of pound sales.

Dollars L-52 w.e. 9/8/24	Produce department			Vegetables		
	Total	Conventional	Organic	Total	Conventional	Organic
<b>Dollar Sales</b>	<b>\$91.7B</b>	<b>\$80.4B</b>	<b>\$11.3B</b>	<b>\$43.6B</b>	<b>\$37.1B</b>	<b>\$6.5B</b>
Dollar share	100.0%	87.7%	12.3%	100.0%	85.1%	14.9%
Dollars vs. YA	3.3%	3.2%	4.0%	1.0%	0.8%	2.5%
Dollars vs. 2YA	7.0%	7.1%	6.0%	6.0%	6.2%	4.5%
Dollars vs. 3YA	14.1%	14.4%	12.6%	9.8%	10.1%	8.3%
<b>Unit Sales</b>	<b>33.3B</b>	<b>30.4B</b>	<b>3.0B</b>	<b>18.1B</b>	<b>16.3B</b>	<b>1.8B</b>
Unit share	100.0%	91.1%	8.9%	100.0%	90.2%	9.8%
Units vs. YA	2.1%	2.0%	3.2%	1.8%	1.9%	0.8%
Units vs. 2YA	3.0%	3.1%	1.8%	1.5%	1.7%	-1.1%
Units vs. 3YA	0.9%	0.8%	1.5%	-1.6%	-1.5%	-3.0%
<b>Volume Sales</b>	<b>49.8B</b>	<b>45.8B</b>	<b>4.0B</b>	<b>22.3B</b>	<b>20.4B</b>	<b>1.9B</b>
Volume share	100.0%	92.0%	8.0%	100.0%	91.6%	8.4%
Volume vs. YA	3.0%	2.8%	6.2%	2.2%	2.0%	3.8%
Volume vs. 2YA	3.6%	3.4%	5.3%	2.0%	2.0%	3.0%
Volume vs. 3YA	1.2%	0.8%	6.2%	-0.5%	-0.7%	1.9%

Source: Circana, Integrated Fresh, Total US, MULO+, 52 weeks ending 9/8/2024

## Organic Mushroom Sales

Organic is also outperforming conventional in fresh mushroom sales. Additionally, organic mushrooms account for a far higher share of sales, at 21.9%, compared to the organic share of total produce/vegetable sales. During the 52 weeks ending September 8<sup>th</sup>, organic mushroom dollar sales increased by 2.0%, whereas conventional sales decreased 3.4%. It is important to note that retailers making assortment-related shifts can influence the subsequent performance numbers.

Fresh mushrooms — dollars	Latest 52 wks	\$ share	Vs. YA	Vs. 2YA	Vs. 3YA
<b>Total</b>	<b>\$1.5 billion</b>	<b>100.0%</b>	<b>-2.3%</b>	<b>-2.5%</b>	<b>-5.3%</b>
Conventional	\$1.2 billion	78.1%	-3.4%	-4.9%	-9.0%
Organic	\$334.7 million	21.9%	+2.0%	+7.3%	+11.1%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 9/8/2024

Volume patterns show the influence of deflation on organic mushrooms' positive dollar performance, with pounds up 3.9% versus the same period a year ago. This is also substantially better than the -4.1% seen for conventional mushrooms.

Fresh mushrooms — pounds	Latest 52 wks	Lbs share	Vs. YA	Vs. 2YA	Vs. 3YA
<b>Total</b>	<b>335.5 million</b>	<b>100.0%</b>	<b>-2.6%</b>	<b>-6.2%</b>	<b>-13.9%</b>
Conventional	269.0 million	80.2%	-4.1%	-8.2%	-16.7%
Organic	66.5 million	19.8%	+3.9%	+3.0%	-0.7%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 9/8/2024

Organic fresh mushroom unit sales also fared better than for their conventional counterparts. The difference between the unit increase of +0.5% and volume increase of +3.9% points to switching to larger pack sizes.

Fresh mushrooms — units	Latest 52 wks	Unit share	Vs. YA	Vs. 2YA	Vs. 3YA
<b>Total</b>	<b>504.1 million</b>	<b>100.0%</b>	<b>-2.6%</b>	<b>-6.6%</b>	<b>-14.3%</b>
Conventional	430.3 million	85.4%	-3.1%	-7.5%	-15.9%
Organic	73.8 million	14.6%	+0.5%	-0.9%	-3.8%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 9/8/2024

### Organic Performance by Mushroom Type

Crimini mushrooms are the biggest organic seller, at \$165.0 million, followed by organic whites. However, while organic crimini mushrooms show growth in dollars and pounds, sales of organic white mushrooms are down. Substantial growth is seen for organic shiitake mushrooms, but this is on a relatively small base.

Organic mushrooms	Dollars L-52				Pounds L-52			
	w.e. 9/8/24	Vs. YA	Vs. 2YA	Vs. 3YA	w.e. 9/8/24	Vs. YA	Vs. 2YA	Vs. 3YA
<b>Total</b>	<b>\$334.7 million</b>	<b>+2.0%</b>	<b>+7.3%</b>	<b>+11.1%</b>	<b>66.5 million</b>	<b>+3.9%</b>	<b>+3.0%</b>	<b>-0.7%</b>
Crimini	\$165.0 million	+3.5%	+8.0%	+12.5%	39.2 million	+10.7%	+7.5%	+6.3%
White	\$96.8 million	-2.2%	-0.9%	-4.4%	21.2 million	-4.9%	-3.0%	-30.4%
Shiitake	\$37.6 million	+4.0%	+43.8%	+118.3%	2.4 million	+1.0%	+24.1%	+80.4%
Portabella	\$20.1 million	-9.4%	-18.0%	-22.5%	2.6 million	-10.6%	-21.5%	-11.6%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 9/8/2024

### Organic Mushroom Regional Performance

Circana divides the nation into nine areas, that are quite different in size. To provide a benchmark for the size of each region, the first column shows the share of total vegetable dollars. In comparison to the share of total vegetable dollars, areas that over index for organic vegetable sales are California and the West.

Comparing the regional mushroom shares to the regional vegetable shares shows which areas of the country have an above-average tendency to purchase mushrooms. These are California, the Great Lakes and the West.



Comparing each region’s share of total mushroom dollars to their share of organic mushroom dollars shows which areas over index for organic sales. Regions with an above average share of organic mushroom sales versus their overall mushroom share include California, the Great Lakes and the West. However, areas that are currently under indexing for organic mushroom sales appear to be growing fast. This includes double-digit growth rates for the Plains and the Southeast.

	Share of vegetable \$	Share of organic vegetable \$	Share of mushrooms	Share of organic mushrooms	Organic mushroom \$ growth
<b>Total US</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>+2.0%</b>
California	12.1%	▲ 18.6%	▲ 14.0%	▲ 23.9%	-3.5%
Great Lakes	13.3%	11.9%	▲ 15.0%	▲ 22.0%	+0.9%
Mid-South	13.0%	11.1%	11.4%	7.5%	▲ +9.7%
Northeast	17.6%	17.3%	17.6%	9.4%	▲ +5.4%
Plains	6.6%	4.6%	6.5%	4.1%	▲ +18.7%
South Central	8.9%	6.8%	6.8%	5.1%	+1.7%
Southeast	15.4%	12.7%	13.4%	9.1%	▲ +11.2%
West	13.1%	▲ 17.0%	▲ 15.4%	▲ 18.9%	-1.0%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 9/8/2024

▲ = Above-average share of organic vs. total and mushrooms vs. vegetables

▲ = Above-average growth performance

## Conclusion

Organic remains an area of growth for total produce, vegetables and mushrooms alike. Opportunity exists in closing the gap in under-indexing regions, such as the Mid-South, Northeast and the Plains.

## Helpful Hints

This information can be found in the quad-week retail tracker reports, using the organic sales tab. Information can be found for:

- Three time periods, including four, thirteen and 52 weeks.
- The various mushroom types, including white, crimini, shiitake and portabella mushrooms.
- The total U.S., the nine Circana regions and the major markets.