

July 2026 — Four weeks ending 07/26/2026



A Strong July for Frozen and Refrigerated Foods in an Otherwise Subdued Month

Financial strain, combined with a food safety outbreak in fresh vegetables, contributed to a month of modest dollar gains but a nearly 1% decline in unit sales. Frozen and refrigerated were among the few departments to post growth across dollars, units and pounds.

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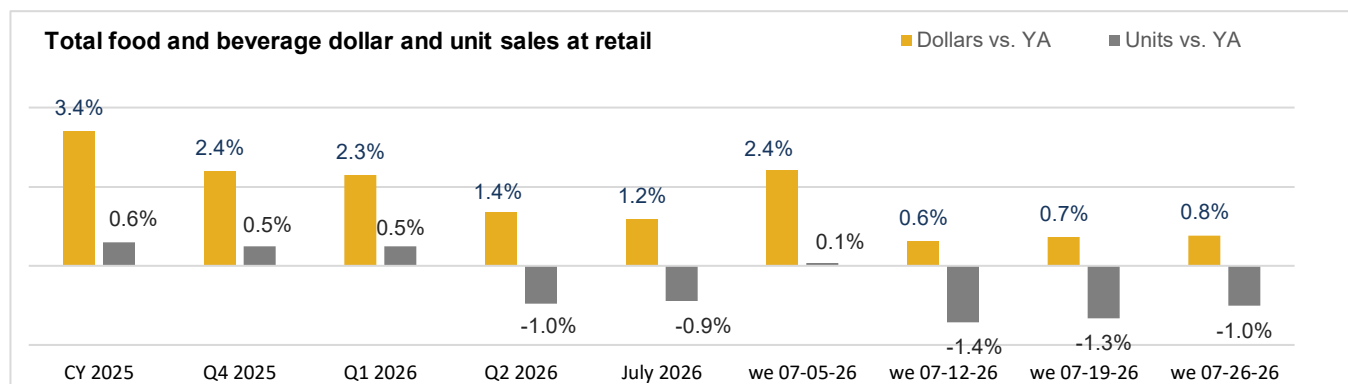
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July in Review

- Macro pressures on retail spending persisted, though the July rate of inflation slowed and fuel prices improved compared to earlier in the year. Consumers responded positively, with the University of Michigan's July Consumer Sentiment Index rising nearly 12% from June to 55.2, though it remained 10.5% below July 2025.
- The national average price for regular gasoline in the U.S. was \$4.09 per gallon, with substantial volatility throughout July, increasing fuel costs by roughly \$20 per week for the typical household.
- The overall labor market remained stable, marked by cautious hiring and limited layoffs, with the unemployment rate holding steady at 4.2%.
- Large chain restaurants continued to experience a 2% decline in visits in July, according to Circana.
- Tighter SNAP eligibility requirements are reducing program participation, resulting in an estimated \$10 billion reduction in EBT benefits in 2026. Combined with pressured personal savings, consumers are likely to maintain a disciplined approach to spending.
- Total retail food and beverage unit sales declined 0.9% during the four weeks ending July 26. Weekly performance ranged from flat during the Fourth of July holiday week to a decline of 1.4% in the second week of July. Non-food unit sales fell 2.6% in the latest four weeks. These trends were largely unchanged from the second quarter and remained softer than earlier in the year.
- The week ending July 26 marked the first full week of U.S. retail sales following the cyclospora outbreak. Sales data indicates a broad-based decline in fresh produce purchasing across most produce categories, retailers and channels, with 60 fresh produce subcategories posting declines in dollars, units and/or volume during the week ending July 26. A change in produce purchases can result in different meal choices and subsequently impact frozen and refrigerated choices. Circana is published a Weekly Produce Sales Tracker: [Unify+](#) (Chrome recommended.)



Inflation Insights

Retail price growth in Circana's MULO+ universe decelerated to 2.1% in July 2026 (the four weeks ending July 26, 2026), down from 2.3% in the second quarter of 2026. Price trends varied widely:

- Center-store prices reached an average of \$4.13 per unit in July, up 3.2% year over year.
- The average unit price across all perishable departments was \$4.36, up 1.2% versus July 2025.
- Coffee, chocolate and beef prices remained elevated, although inflation rates for coffee and beef moderated as year-over-year comparisons lapped earlier price increases.
- Egg prices continued to decline in July, leading to deflation for the refrigerated foods department. Frozen food prices rose by 1.9%, slightly below their annual rate of 2.2%.

Price per unit	Price/unit	Change vs. YA	Change vs. 3YA
Total food and beverages July 2026	\$4.38	+2.1%	+6.7%
Frozen food department July 2026	\$5.41	+1.9%	+4.2%
Refrigerated department July 2026	\$3.76	-2.7%	+7.2%
Total food and beverages latest 52 weeks	\$4.34	+2.2%	+6.8%
Frozen food department latest 52 weeks	\$5.37	+2.2%	+4.1%
Refrigerated department Latest 52 weeks	\$3.78	-4.0%	+2.8%

Source: Circana, Integrated Fresh, Total US, MULO+, average price per volume and % gain versus YA and 3YA

Total Store Sales Comparison

The four-week month of July delivered \$74.9 billion in total food and beverage sales in Circana's MULO+ universe. For most perishable departments July had modest dollar gains, but unit declines. The frozen and refrigerated food departments were two important exceptions, both staying ahead of year-ago levels.

	July 2026					Latest 52 weeks			
	Dollar Size	Dollars vs. YA	Dollars vs. 2YA	Units vs. YA	Units vs. 2YA	Dollars vs. YA	Dollars vs. 2YA	Units vs. YA	Units vs. 2YA
Total food & beverages	\$74.9B	+1.2%	+5.0%	-0.9%	+0.1%	+2.3%	+6.2%	+0.1%	+1.3%
Total dry grocery	\$37.2B	+3.3%	+6.7%	+0.1%	+0.5%	+3.6%	+6.6%	-0.1%	+0.8%
Total perishables	\$34.0B	-0.7%	+4.3%	-1.9%	-0.3%	+1.5%	+6.9%	+0.5%	+2.2%
Frozen food department	\$7.2B	+2.1%	+4.6%	+0.2%	+0.6%	+2.0%	+4.0%	-0.1%	+0.6%
Refrigerated dpt	\$7.8B	-1.6%	+3.6%	+1.2%	+2.3%	-3.0%	+7.1%	+1.0%	+2.9%

Source: Circana, Integrated Fresh, Total US, MULO+, % change vs. year ago.

Week by Week Sales — Frozen Foods and Refrigerated

Three out of the four July weeks posted dollar and unit gains for the frozen food department. The first and last week of July were the strongest. Unit growth was positive all four July weeks for refrigerated foods, with the rate of gain accelerating toward the end of the month.

	Frozen food department			Refrigerated department		
	Dollars	\$ vs. YA	Units vs. YA	Dollars	\$ vs. YA	Units vs. YA
July 2026	\$7.2B	+2.1%	+0.2%	\$7.8B	-1.6%	+1.2%
w.e. 07-05-26	\$1.9B	+2.7%	+1.0%	\$2.0B	-1.2%	+1.1%
w.e. 07-12-26	\$1.8B	+0.7%	-1.6%	\$1.9B	-2.4%	+0.4%
w.e. 07-19-26	\$1.8B	+2.4%	+0.6%	\$1.9B	-1.5%	+1.6%
w.e. 07-26-26	\$1.7B	+2.8%	+1.0%	\$1.9B	-1.2%	+1.7%

Source: Circana, Integrated Fresh, Total US, MULO+, % change vs. year ago.

Refrigerated Food

Underneath the overall unit growth of 1.2% were many ups and downs at the category level. Three out of the largest four categories posted unit growth, including milk, natural cheese and yogurt. Egg unit sales were down year over year in July. Cottage cheese had the highest growth rate in the dollars, units and volume in July.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Volume sales vs. YA	Avg. price per unit	Increase price vs. YA
Refrigerated department	\$7.8B	-1.6%	+1.2%	--	\$3.76	-2.7%
Dairy aisle	\$6.6B	-2.3%	+1.2%	--	\$3.72	-3.5%
Milk	\$1.5B	+6.8%	+0.4%	-0.7%	\$4.00	+6.4%
Natural cheese	\$1.1B	-3.0%	+0.7%	+0.1%	\$3.59	-3.7%
Yogurt	\$1.1B	+9.8%	+3.1%	+6.8%	\$3.08	+6.5%
Refrigerated eggs	\$791M	-27.9%	-0.6%	--	\$3.86	-27.4%
Refrigerated creams/creamers	\$501M	+0.8%	+0.1%	--	\$4.39	+0.6%
Butter/margarine/spreads	\$479M	-7.0%	-0.8%	-1.3%	\$4.45	-6.2%
Cream cheese	\$203M	-3.4%	-0.5%	+4.5%	\$3.56	-6.2%
Cottage cheese	\$191M	+20.0%	+7.5%	+13.0%	\$3.53	+8.2%
Processed cheese	\$179M	-4.3%	-3.5%	-3.1%	\$4.50	-0.8%
Whipped toppings	\$179M	-0.4%	+6.4%	+9.4%	\$4.42	-6.4%
Sour cream	\$144M	+1.3%	+0.2%	+0.2%	\$2.76	+1.1%

Refrigerated beverages also had a good July, driven by gains in juice and other drinks. A very small category, condiments, also showed robust growth in dollars, units and pounds.

July 2026 (continued)	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Volume sales vs. YA	Avg. price per unit	Increase price vs. YA
Refrigerated desserts	\$95.1M	+3.9%	+3.0%	-2.3%	\$3.49	-0.2%
Refr. cheese snack kits	\$22.6M	+4.9%	-0.5%	+8.9%	\$3.55	-2.7%
Dairy alternative cheese	\$8.5M	-9.7%	-6.4%	-11.9%	\$3.69	+1.8%
Refrigerated beverages	\$957M	+2.7%	+0.4%	+2.1%	\$4.07	+1.9%
Refrigerated juices/drinks	\$647M	+3.4%	+1.0%	+2.7%	\$4.09	+1.8%
Refrigerated tea/coffee	\$310M	+1.3%	-0.7%	+1.3%	\$4.03	+2.1%
Refrigerated dough	\$191M	+2.9%	+1.5%	+1.3%	\$3.38	+1.5%
Refrigerated condiments	\$8.8M	+14.2%	+8.5%	+10.7%	\$4.87	+0.2%

Source: Circana Integrated Fresh, Total US, MULO+



Refrigerated condiments may be a small category today, but their robust growth signals growing interest in sauces, marinades and other flavor boosters that can make everyday meals more interesting. As more of these products move from center store to the refrigerated perimeter, they are creating new opportunities for retailers to capture this demand.

Tricia Greyshock | President & CEO | National Frozen & Refrigerated Foods Association

Frozen Meals

Frozen meals delivered \$2.1 billion in July 2026 sales but the year-over-year performance continued to experience some softness in dollars, units and pounds. Even frozen pasta and breakfast foods, that had posted growth in recent months were down year on year in units and pounds, despite mild inflation.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per unit	Increase price vs. YA
Frozen Meals	\$2.1B	-1.2%	-2.1%	-2.8%	\$4.84	+0.9%
Frozen dinners/entrees	\$1.0B	+0.1%	-1.6%	-2.7%	\$4.57	+1.6%
Frozen pizza	\$529M	-2.6%	-3.0%	-4.1%	\$5.21	+0.4%
Frozen breakfast food	\$424M	-2.5%	-2.2%	-1.1%	\$5.24	-0.3%
Frozen side dishes	\$60.8M	+2.4%	-3.1%	-0.5%	\$3.96	+5.7%
Frozen pasta	\$35.9M	-1.8%	-0.9%	-3.9%	\$5.10	-0.9%

Source: Circana Integrated Fresh, Total US, MULO+

Frozen Desserts

July delivered renewed growth for frozen desserts that had lost some momentum in May and June. Frozen novelty sales climbed to \$909 million in July, up 2.7% in dollars and virtually unchanged in pounds. Ice cream had a strong month, with \$738 million in monthly sales and robust gains in dollars, units and pounds.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per unit	Increase price vs. YA
Frozen desserts	\$1.7B	+3.0%	+1.5%	--	\$4.70	+1.5%
Frozen novelties	\$909M	+2.7%	+1.0%	-0.4%	\$4.93	+1.7%
Ice cream/sherbet	\$738M	+3.9%	+2.8%	+1.2%	\$4.59	+1.0%
Frozen desserts/toppings	\$70.6M	-1.4%	-3.5%	-2.2%	\$3.45	+2.2%

Source: Circana Integrated Fresh, Total US, MULO+



Ice cream had plenty of reasons to celebrate in July, from America's 250th anniversary and Fourth of July gatherings to the excitement surrounding FIFA World Cup. These summer occasions helped drive ice cream and sherbet dollar sales up 3.9%, with units also growing 2.8%.

Tricia Greyshock | President & CEO | National Frozen & Refrigerated Foods Association

Frozen Fruit and Vegetables

Fruit and plain vegetables fueled dollar, unit and volume growth. Despite a year-over-year price increase of 1.6%, fruit enjoyed 8.0% growth in units. Though frozen vegetables do not directly compete with fresh lettuce and leafy greens, the Cyclospora recall and subsequent drop in sales does seem to correlate to above-average dollar, unit and pound growth for plain vegetables.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per unit	Increase price vs. YA
Frozen fruit & vegetables	\$816M	+5.7%	+5.1%	+3.8%	\$3.77	+0.6%
Frozen fruit	\$250M	+9.8%	+8.0%	+4.6%	\$7.01	+1.6%
Frozen plain vegetables	\$280M	+7.7%	+6.7%	+6.0%	\$2.39	+0.9%
Frozen potatoes/onion rings	\$286M	+0.2%	+0.3%	+1.3%	\$4.48	-0.1%

Source: Circana Integrated Fresh, Total US, MULO+

Frozen Seafood

Frozen seafood continued to post inflation-driven dollar gains, but unit and pound sales were down substantially year over year. This was driven by shellfish, that experienced double-digits unit and pound decreases. In contrast, frozen finfish enjoyed stable unit and pound sales.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per volume	Increase price vs. YA
Frozen seafood	\$673M	+5.1%	-6.7%	-4.7%	\$8.34	+10.3%
Frozen shellfish	\$392M	+4.7%	-9.7%	-7.4%	\$9.37	+13.1%
Frozen finfish	\$258M	+7.1%	-0.3%	-0.2%	\$7.20	+7.3%

Source: Circana Integrated Fresh, Total US, MULO+

Frozen Meat and Poultry

Frozen processed meat and poultry, including items such as chicken nuggets/strips and sausage, continued to post gains. Price inflation has been relatively mild, at 1.6%. Combined with demand growth, dollars rose 2.8% over July 2025.

Frozen meat and poultry experienced dollar and volume gains, while unit sales fell short of year-ago levels, signaling a shift toward larger pack sizes. Growth was driven by chicken and turkey, while beef and meat alternatives fell short of year-ago levels.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per unit	Change vs. YA
Fz processed meat/poultry	\$676M	+2.8%	+1.2%	+0.7%	\$8.62	+1.6%
Frozen processed chicken	\$596M	+2.6%	+1.2%	+0.6%	\$9.27	+1.4%
Frozen breakfast sausage	\$78.7M	+4.1%	+1.0%	+1.7%	\$5.64	+3.1%
Frozen meat/poultry	\$593M	+2.6%	-4.0%	+2.9%	\$11.92	+6.9%
Frozen beef	\$357M	+6.4%	-4.8%	-4.9%	\$14.24	+11.7%
Frozen chicken	\$137M	-3.0%	-9.2%	+16.0%	\$13.78	+6.9%
Frozen meat alternatives	\$49.8M	-8.3%	-6.5%	-9.8%	\$6.42	-2.0%
Frozen turkey	\$37.9M	+7.0%	+15.4%	+4.9%	\$6.50	-7.3%

Source: Circana Integrated Fresh, Total US, MULO+

Frozen Snacks, Baked Goods and Beverages

Frozen snacks, baked goods and beverages are smaller categories, with varied results.

- The frozen snack category is the largest of the three and posted dollar, unit and pound growth with strength for appetizers.
- Frozen baked goods also posted substantial growth, with gains for bread and pies.
- Frozen beverages is the smallest frozen category with substantial declines year over year.

July 2026	Dollar sales	Dollar sales gains vs. YA	Unit sales vs. YA	Pound sales vs. YA	Avg. price per unit	Increase price vs. YA
Frozen snacks	\$314M	+1.9%	+3.2%	+1.6%	\$6.55	-1.2%
Frozen appetizers	\$312M	+1.9%	+3.3%	+1.6%	\$6.56	-1.3%
Frozen baked goods	\$176M	+4.4%	+3.7%	+12.0%	\$4.66	+0.8%
Bread	\$127M	+1.3%	+2.1%	+8.4%	\$4.38	-0.7%
Pies	\$46.6M	+14.3%	+9.1%	+25.0%	\$5.46	+4.7%
Frozen beverages	\$19.2M	-15.1%	-15.8%	-18.8%	\$3.47	+0.8%

Source: Circana Integrated Fresh, Total US, MULO+

Additional Resources

Check nfraweb.org for additional resources, including the Circana dashboard for the latest 52-week data.