

ASB @ IBIE

Fireside Chats



INTERNATIONAL
DAIRY DELI BAKERY
ASSOCIATION



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Perimeter Overview August 2025

Departments		\$ Sales		\$ Sales vs. YA		Unit Sales vs. YA
Meat Department		\$8.5B		6.2%		1.2%
Produce Department		\$7.5B		3.2%		0.5%
Dairy Aisle		\$6.7B		4.2%		0.4%
Deli Department		\$4.9B		3.6%		2.2%
Bakery Department	July: 3.8B	\$3.6B	July: 0.0%	-0.1%	July: -1.5%	-1.9%
Seafood Department		\$656.6M		1.3%		-2.1%



Source: Circana, Integrated Fresh, Total U.S., 2025



IDDBA and Circana Monthly Updates Can be Found Here:



Full Access For Members Only



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August 2025

52WE 8/24/25

Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Total Bakery	\$3.6B	-0.1%	-1.9%
Center-store Bakery	\$2.1B	-1.4%	-2.8%
Perimeter Bakery	\$1.6B	1.7%	-0.2%

Total Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Total Bakery	\$48.6B	0.1%	-1.0%
Center-store Bakery	\$26.8B	-1.4%	-2.3%
Perimeter Bakery	\$21.6B	2.0%	1.0%

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August 2025

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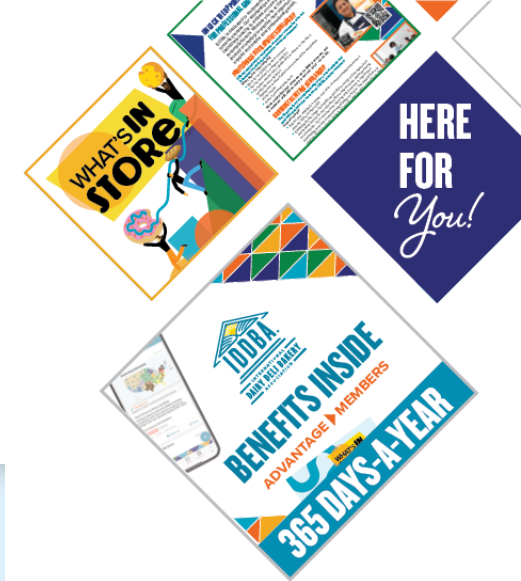
Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA	Perimeter Bakery	\$ Sales	\$ Sales % Change vs. YA	Units vs. YA
Perimeter Bakery	\$1.6B	1.7%	-0.2%	Perimeter Bakery	\$21.6B	2.0%	1.0%
Desserts/Sweet Snacks	\$780.4M	0.8%	-0.9%	Desserts/Sweet Snacks	\$11.3B	1.2%	-0.1%
Morning Bakery	\$408.1M	3.7%	3.6%	Morning Bakery	\$5.4B	4.0%	2.4%
Breads & Rolls	\$370.4M	1.5%	-2.8%	Breads & Rolls	\$4.9B	2.0%	1.1%
Cakes	\$453.1M	2.0%	3.9%	Cakes	\$6.3B	1.7%	1.6%
Cookies	\$230.3M	0.7%	-7.1%	Cookies	\$3.2B	2.8%	-0.1%
Pastry/Danish/ Coffee Cakes	\$144.0M	0.9%	2.7%	Pastry/Danish/ Coffee Cakes	\$2.0B	0.9%	0.5%
Donuts	\$134.4M	3.3%	2.6%	Donuts	\$1.8B	4.8%	1.4%
Muffins	\$129.7M	7.3%	6.4%	Breads	\$1.7B	0.2%	1.6%
Breads	\$125.8M	2.8%	-4.7%	Muffins	\$1.6B	7.0%	6.7%
Buns & Rolls	\$94.7M	-3.1%	-3.2%	Buns & Rolls	\$1.3B	0.8%	0.2%
Croissants	\$80.9M	5.6%	2.6%	Pies	\$1.3B	-1.9%	-4.0%
Pies	\$57.6M	-6.7%	-5.4%	Croissants	\$1.0B	10.5%	9.2%
Bagels/Bialys	\$35.0M	-2.5%	-5.0%	Bagels/Bialys	\$456.6M	-1.1%	-2.4%
Brownies/Squares/ Bars	\$34.4M	12.5%	8.4%	Brownies/Squares/ Bars	\$425.0M	-0.9%	-2.1%
Tortillas/Wraps/ Flatbreads	\$33.7M	5.1%	2.4%	Tortillas/Wraps/ Flatbreads	\$397.9M	-3.3%	-4.9%
Specialty Desserts	\$5.0M	-43.5%	-5.8%	Specialty Desserts	\$103.8M	-22.9%	-11.6%



Yearly What's In Store
trends report publication



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Top 10 Flavors
updated monthly in
What's In Store



Flavor-Int Fresh	Latest 52 Weeks Ending 08-24-25					
	Dollar Sales	Dollar Sales Change vs YA	Dollar Sales % Change vs YA	Unit Sales	Unit Sales Change vs YA	Unit Sales % Change vs YA
APPLE CINNAMON	\$13,942,221	\$11,291,909	426.1%	2,798,000	2,326,348	493.2%
CHEESE/CREAM CHEESE	\$791,155	\$488,447	161.4%	186,510	125,543	205.9%
DULCE DE LECHE	\$7,451,270	\$5,078,483	214.0%	729,918	467,530	178.2%
MINT	\$4,418,892	\$1,991,921	82.1%	927,931	496,700	115.2%
COFFEE	\$4,371,353	\$1,516,025	53.1%	630,096	272,237	76.1%
MOLASSES	\$1,884,953	\$681,091	56.6%	332,268	124,077	59.6%
ALMOND	\$33,783,853	\$14,391,226	74.2%	5,571,379	2,064,238	58.9%
MIXED BERRY	\$6,364,261	\$2,683,762	72.9%	619,533	214,127	52.8%
CEREAL	\$5,866,232	\$3,255,154	124.7%	801,792	275,801	52.4%
PINEAPPLE	\$9,386,755	\$2,366,683	33.7%	1,181,418	406,032	52.4%

Source: Circana Integrated Fresh Market Advantage, MULO+, Data Ending 08.24.2025						
Flavor-Int Fresh	Latest 4 Weeks Ending 08-24-25					
	Dollar Sales	Dollar Sales Change vs YA	Dollar Sales % Change vs YA	Unit Sales	Unit Sales Change vs YA	Unit Sales % Change vs YA
APPLE CINNAMON	\$1,254,239	\$1,064,348	560.5%	253,257	219,058	640.5%
HERB/SPICE	\$144,161	\$103,424	253.9%	41,209	31,814	338.7%
COFFEE	\$585,668	\$395,051	207.2%	95,275	71,673	303.7%
MINT	\$134,697	\$88,981	194.6%	28,821	18,873	189.7%
ALMOND	\$3,258,510	\$1,959,226	150.8%	546,796	308,142	129.1%
PINEAPPLE	\$1,112,234	\$351,467	46.2%	159,509	85,021	114.1%
CEREAL	\$697,033	\$466,570	202.4%	76,813	31,868	70.9%
CREAM CHEESE	\$5,823,837	\$1,953,151	50.5%	1,195,294	422,117	54.6%
AO BERRY	\$451,759	\$109,421	32.0%	66,645	22,704	51.7%
CINNAMON SUGAR	\$1,884,800	\$239,583	14.6%	642,643	187,150	41.1%



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Big Picture Trends to Capture 2026



Convenience /Ease of Use



Ethical Clean Ingredients and Process



Global Flavor Innovations



Balance Between Healthy and Tasty Luxuries



Traditional/ Homemade



Overarching Focuses on Simplicity, Clean and Nostalgia



IDDBA





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