



Organic Mushroom Sales and Performance Review

*Sales, shares and performance by type,
package size and region*



Organic Mushroom Review

Largest Sellers (MULO+ | 52 weeks ending 11/2/2025)

White and crimini mushrooms dominate the top seller's chart.

- Conventional 8-ounce white mushrooms in sliced and whole are the two top selling mushroom types across U.S. retailers.
- White mushrooms make four more appearances in the top 10, reflecting different pack sizes, sliced and organic mushrooms.
- Crimini mushrooms take third through sixth place in the top 10, including two 8-ounce packages and one 24-ounce package.
- Two of the top 10 sellers are organic:
 - #4: Crimini 24-ounce whole
 - The crimini 24-ounce whole mushrooms show growth in dollars, units and pounds.
 - #10: White 24-ounce whole
 - The white 24-ounce whole is down YOY in all three measures.

Product	Package Weight	Organic Claim	Preparation	Dollar Sales	Dollar Sales % Change vs YA	Unit Sales	Unit Sales % Change vs YA	Volume Sales	Volume Sales % Change vs YA
White mushrooms	8 OZ	Conventional	Sliced	\$178,263,577	-6.6%	83,527,351	-5.0%	41,763,675	-5.0%
White mushrooms	8 OZ	Conventional	Whole	\$172,686,376	-4.4%	86,196,201	-3.0%	43,098,101	-3.0%
Crimini/brown mushrooms	8 OZ	Conventional	Sliced	\$109,256,053	-6.6%	42,984,625	-3.4%	21,492,313	-3.4%
Crimini/brown mushrooms	24 OZ	Organic	Whole	\$87,527,095	+4.1%	15,695,633	+2.1%	23,543,450	+2.1%
Crimini/brown mushrooms	8 OZ	Conventional	Whole	\$86,627,715	-4.1%	37,009,766	-1.6%	18,504,883	-1.6%
White mushrooms	24 OZ	Conventional	Whole	\$67,040,765	+13.2%	15,365,416	+11.8%	23,048,123	+11.8%
White mushrooms	16 OZ	Conventional	Sliced	\$58,879,954	-15.8%	17,764,511	-14.0%	17,704,586	-14.1%
White mushrooms	16 OZ	Conventional	Whole	\$52,008,916	-8.5%	13,821,742	-7.5%	13,821,051	-7.5%
Portabella mushrooms`	8 OZ	Conventional	Whole	\$51,076,045	+1.0%	24,763,976	+3.6%	12,381,987	+3.6%
White mushrooms	24 OZ	Organic	Whole	\$38,907,177	-1.5%	6,927,124	-2.8%	10,390,686	-2.8%

Crimini Share of Organic (MULO+ | 52 weeks ending 11/2/2025)

- Crimini mushrooms represent 52.2% of total organic fresh mushroom dollar sales and 50.7% of unit sales.
- White mushrooms represent another 28.7% of total organic fresh mushroom sales and 34.9% of unit sales.
- Shiitake sits in third, representing 11.4% of dollars and 7.9% of units.
- Crimini, white and shiitake combined gets us to more than 92% of the organic market. Specialty makes up the remainder.
- Organic crimini and shiitake are growing in dollars, units and volume.

Product	Dollar Sales	Dollar Sales % Change vs YA	Dollar Sales % Change vs 2 YA	Unit Sales	Unit Sales % Change vs YA	Unit Sales % Change vs 2 YA	Volume Sales
Fresh mushrooms	Organic	\$335,893,918	-0.5%	73,666,744	-0.3%	67,501,387	+0.6%
Crimini/brown mushrooms	Organic	\$175,389,502	+1.8%	37,314,444	+1.4%	41,699,365	+2.7%
White mushrooms	Organic	\$96,391,654	-0.7%	25,683,683	+0.4%	21,119,467	-0.7%
Shiitake mushrooms	Organic	\$38,294,484	+2.8%	5,844,876	+2.8%	2,451,407	+1.6%



Understanding the Impact of Distribution (MULO+ | 52 weeks ending 11/2/2025)

- Organic mushrooms have gained in distribution, whereas conventional has lost distribution over the past year.
- The loss of conventional distribution is greatest for crimini, down 3.2%, whereas organic mushrooms gained about an equal share.
- The pattern is opposite for whites, a slight gain in conventional, a slight loss in organic.
- Shiitake patterns mirror those in crimini: a loss of conventional distribution and a gain of organic.

Product	Organic Claim	Average Weekly ACV Distribution	Average Weekly ACV Distribution Year Ago	Difference in distribution	% difference in distribution
Fresh mushrooms	Conventional	79.78	79.92	-0.14	-0.2%
Fresh mushrooms	Organic	60.79	59.78	+1.01	+1.7%
Crimini/brown mushrooms	Conventional	63.36	65.47	-2.11	-3.2%
Crimini/brown mushrooms	Organic	52.63	51.08	+1.55	+3.0%
White mushrooms	Conventional	78.13	77.70	+0.43	+0.6%
White mushrooms	Organic	48.96	49.41	-0.45	-0.9%
Shiitake mushrooms	Conventional	19.84	21.69	-1.86	-8.6%
Shiitake mushrooms	Organic	22.05	21.22	+0.83	+3.9%



Organic/Conventional Price Differential (MULO+ | 52 weeks ending 11/2/2025)

- Across total produce, organic is priced 61.3% higher on a per pound basis.
- In total vegetables, the difference is 94.6%.
- For total mushrooms the average price per pound is \$0.64 higher than conventional, a difference of 14.9%.
- Organic crimini mushrooms were retailed at a lower price per pound versus conventional over the past year.
- The price differential for white mushrooms is 17.6%.

Product	Organic Claim	Price per Unit	Price per Unit % Change vs YA	Price per Volume	Price per Volume % Change vs YA	Price difference between organic and conventional (price per pound)	Percentage difference in price per pound
Dept-produce	Total mushrooms	\$2.80	1.3%	\$1.88	1.1%		
Dept-produce	Conventional	\$2.70	1.3%	\$1.79	1.2%		
Dept-produce	Organic	\$3.82	0.3%	\$2.89	-0.9%	\$1.10	61.3%
Fresh vegetables	Total mushrooms	\$2.44	0.3%	\$1.99	-0.1%		
Fresh vegetables	Conventional	\$2.30	0.3%	\$1.84	-0.1%		
Fresh vegetables	Organic	\$3.70	0.1%	\$3.59	-0.1%	\$1.74	94.6%
Fresh mushrooms	Total mushrooms	\$2.99	-1.2%	\$4.47	-1.7%		
Fresh mushrooms	Conventional	\$2.71	-1.9%	\$4.33	-2.0%		
Fresh mushrooms	Organic	\$4.56	-0.2%	\$4.98	-1.1%	\$0.64	14.9%
Crimini/brown mushrooms	Total mushrooms	\$3.37	-1.7%	\$4.53	-1.8%		
Crimini/brown mushrooms	Conventional	\$2.95	-3.3%	\$4.71	-2.0%		
Crimini/brown mushrooms	Organic	\$4.70	0.4%	\$4.21	-0.9%	-\$0.50	-10.6%
White mushrooms	Total mushrooms	\$2.65	-0.7%	\$3.96	-1.4%		
White mushrooms	Conventional	\$2.53	-0.9%	\$3.88	-1.7%		
White mushrooms	Organic	\$3.75	-1.2%	\$4.56	0.0%	\$0.68	17.6%
Shiitake mushrooms	Total mushrooms	\$5.71	0.7%	\$14.94	1.2%		
Shiitake mushrooms	Conventional	\$4.85	-1.0%	\$14.08	0.3%		
Shiitake mushrooms	Organic	\$6.55	0.0%	\$15.62	1.2%	\$1.54	10.9%

Largest Organic Sellers (MULO+ | 52 weeks ending 11/2/2025)

- The 24-ounce crimini whole is not only the largest seller but also adding the most new dollars/units/pounds.
- The number three and four sellers are 8-ounce crimini and white mushrooms, both whole. Both are down in dollars, but up in units and pounds.
- Sliced comes in as the number five (sliced white 8-ounce packages) and the number six, a sliced shiitake, 5-ounce.
- Sliced has been under performing in general (likely the consumer focus on food waste). Product Package Weight Organic Claim Preparation Dollar Sales Dollar

Product	Package Weight	Organic Claim	Preparation	Dollar Sales	Dollar Sales % Change vs YA	Unit Sales	Unit Sales % Change vs YA	Volume Sales	Volume Sales % Change vs YA
Crimini/brown mushrooms	24 OZ	Organic	Whole	\$87,527,095	4.1%	15,695,633	2.1%	23,543,450	2.1%
White mushrooms	24 OZ	Organic	Whole	\$38,907,177	-1.5%	6,927,124	-2.8%	10,390,686	-2.8%
Crimini/brown mushrooms	8 OZ	Organic	Whole	\$25,213,486	-2.8%	7,962,449	0.4%	3,981,225	0.4%
White mushrooms	8 OZ	Organic	Whole	\$24,417,870	-1.8%	8,865,426	1.6%	4,432,713	1.6%
White mushrooms	8 OZ	Organic	Sliced	\$18,664,720	2.5%	6,623,381	5.7%	3,311,690	5.7%
Shiitake mushrooms	5 OZ	Organic	Sliced	\$15,190,849	-3.3%	2,729,210	-2.9%	852,878	-2.9%
Crimini/brown mushrooms	8 OZ	Organic	Sliced	\$14,538,241	-8.6%	4,622,907	-5.1%	2,311,453	-5.1%
Crimini/brown mushrooms	16 OZ	Organic	Whole	\$10,272,487	-10.8%	1,978,670	-11.5%	1,978,670	-11.5%
White fresh mushrooms	16 OZ	Organic	Whole	\$8,775,830	-11.2%	1,976,300	-13.2%	1,976,299	-13.2%
White fresh mushrooms	16 OZ	Organic	Sliced	\$4,037,673	44.9%	801,862	42.3%	801,862	42.3%

Regional Differences (MULO+ | 52 weeks ending 11/2/2025)

- Importantly, organic sales are driven by three key regions that have a far higher share of organic mushrooms.
- Overall, 23.2% of fresh mushroom dollars and 20.8% of total volume are organic.
- California, the Great Lakes and the West have shares that are far above average, especially California, at 38.9%.
- Interestingly, these early adopter regions are experiencing YOY sales declines whereas regions with a below-average presence of fresh mushrooms are, by and large, trending up.

Product	Geography	Organic Claim	Dollar Sales	Share of total	Dollar Sales % Change vs YA	Volume Sales	Share of total	Volume Sales % Change vs YA
Fresh mushrooms	Total US	Organic	\$335,893,918	23.2%	-0.5%	67,501,387	+20.8%	+0.6%
Fresh mushrooms	California	Organic	\$80,090,844	38.9%	-0.3%	16,211,328	+40.0%	-3.5%
Fresh mushrooms	Great Lakes	Organic	\$71,358,244	32.9%	-3.4%	14,441,184	+29.7%	+0.5%
Fresh mushrooms	Mid-South	Organic	\$27,093,648	16.2%	+5.9%	5,585,939	+14.3%	+11.4%
Fresh mushrooms	Northeast	Organic	\$32,795,564	13.0%	+3.4%	6,323,496	+11.1%	-5.2%
Fresh mushrooms	Plains	Organic	\$14,301,601	15.6%	+1.1%	3,396,249	+16.3%	+11.1%
Fresh mushrooms	South Central	Organic	\$16,904,360	17.0%	-1.3%	3,702,035	+14.8%	+2.0%
Fresh mushrooms	Southeast	Organic	\$33,596,735	17.2%	+6.2%	6,221,619	+12.9%	+16.3%
Fresh mushrooms	West	Organic	\$59,752,922	27.3%	-5.5%	11,619,536	+25.8%	-4.9%

Markets with the highest share of organic are:

Grand Rapids, MI	60.0%
San Francisco/Oakland, CA	51.6%
Detroit, MI	46.2%
Chicago, IL	44.1%
San Diego, CA	39.4%
Seattle/Tacoma, WA - Multi Outlet+	36.9%

Los Angeles, CA - Multi Outlet+	36.5%
Sacramento, CA - Multi Outlet+	36.3%
Indianapolis, IN - Multi Outlet+	35.7%
Denver, CO - Multi Outlet+	33.2%
Cincinnati/Dayton, OH - Multi Outlet+	30.4%
Louisville, KY - Multi Outlet+	30.0%



Takeaways Organic Mushrooms

1. Above-average market share, but driven by select regions

- Organic has a much higher share in mushrooms than in vegetables or total produce.
- However, sales are heavily concentrated in three regions, being California, the Great Lakes, and the West.
- Notably, these "early adopter" regions are experiencing year-over-year sales declines.

2. Growth in low-share regions is insufficient to offset declines in core regions

- Regions with below-average organic mushroom presence are trending upward in sales, which could indicate growth potential.
- However, these markets start from a low base, meaning their contribution to overall organic growth is minimal compared to the declines in high-share regions like California.

3. Varying performance of key organic products

- The 24-ounce crimini whole mushroom is the top organic seller and shows growth in dollars, units, and pounds.
- Other major organic products are underperforming.

4. Organic comes at a price differential, with some exceptions

- Organic mushrooms are priced 14.9% higher per pound than conventional mushrooms (\$0.64 more on average).
- Across total produce, the organic price premium is even steeper at 61.3%, and for vegetables, it's 94.6%.
- Price gaps can be a deterrence to cost-sensitive consumers, especially in the current economic environment.
- Organic crimini mushrooms are priced lower than their conventional counterparts, but this is an anomaly.

5. A look at drivers: demand versus distribution

- While conventional mushrooms still dominate the market, organic mushrooms have gained distribution.
- In many cases, organic distribution appears to be a substitution of conventional, rather than expanded assortment. In other words, organic sales gains are, in large part, driven by distribution gains into new retailers and/or pack sizes and types.
- White mushrooms are an exception with increased conventional distribution, while organic distribution has slightly declined.



Thank you!



Data and insights in this report are sourced from research conducted by the Mushroom Council, based on Circana, Integrated Fresh, MULO+ for the 52 weeks ending 11/2/2025, released November 2025.

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