INFRA 2025 BY THE NUMBERS

402
Members

38
New members added

$40
Average basket

655
Locations

61
New locations added

6,500
Average store square footage

$3.7 billion
Total sales

$9.2 million
Average sales per member

800 to 70,000+
Square footage range

7.9%
Same-store sales growth

$5.7 million
Average sales per location

Across retail, the natural channel is leading overall growth

Natural retailers outpace other stores across most SPINS-tracked channels. The natural channel and INFRA members continue to lead overall growth.

INFRA Channel	Natural Expanded Channel	Regional & Independent Grocery Supermarket Channel	Conventional MultiOutlet
+7.9% Sales Growth	4.2% Sales Growth	-0.7% Sales Growth	+1.9% Sales Growth
+8.3% NATURAL PRODUCTS	+7.6% NATURAL PRODUCTS	+5.0% NATURAL PRODUCTS	+8.3% NATURAL PRODUCTS
+8.2% SPECIALTY & WELLNESS PRODUCTS	+1.9% SPECIALTY & WELLNESS PRODUCTS	+0.0% SPECIALTY & WELLNESS PRODUCTS	+3.4% SPECIALTY & WELLNESS PRODUCTS
+3.8% CONVENTIONAL PRODUCTS	-2.0% CONVENTIONAL PRODUCTS	-1.7% CONVENTIONAL PRODUCTS	+0.7% CONVENTIONAL PRODUCTS

Source: SPINS data for the 52 weeks ending 12/28/25

Across retail, natural products are leading overall growth

Natural products outpace other stores across most SPINS-tracked channels.
The natural channel now faces headwinds as shoppers seek value.

INFRA Channel	Natural Expanded Channel	Regional & Independent Grocery Supermarket Channel	Conventional MultiOutlet
+2.3% Sales Growth	0.0% Sales Growth	-1.7% Sales Growth	+1.8% Sales Growth
+1.6% NATURAL PRODUCTS	+0.6% NATURAL PRODUCTS	+1.7% NATURAL PRODUCTS	+7.8% NATURAL PRODUCTS
+6.4% SPECIALTY & WELLNESS PRODUCTS	+2.3% SPECIALTY & WELLNESS PRODUCTS	+1.1% SPECIALTY & WELLNESS PRODUCTS	+5.5% SPECIALTY & WELLNESS PRODUCTS
+1.2% CONVENTIONAL PRODUCTS	-3.4% CONVENTIONAL PRODUCTS	-2.9% CONVENTIONAL PRODUCTS	+0.2% CONVENTIONAL PRODUCTS

Source: SPINS data for the 52 weeks ending 12/28/25

Where do INFRA stores stand?

How INFRA store growth by category compares with overall natural and organic industry growth, as tracked by NBJ.

Dairy	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 - INFRA Store Growth
Milk/Cream	7.9%	21.6%	8%
Yogurt	11.4%	24.8%	12%
Eggs	15.8%	35.2%	-8%
Cheese	4.8%	12.5%	2%
Butter/Sour Cream/Cottage Cheese	6.0%	17.3%	12%
Frozen Dairy/Ice-cream	4.3%	7.1%	8%
Canned Milk	5.4%	1.1%	-2%
Total	9.7%	20.1%	5.5%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth

Note: INFRA growth calculated from SPINS organic category data

Packaged/Prepared Foods	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 - INFRA Store Growth
Frozen Prepared Food	-1.4%	-2.9%	-0.4%
Refrigerated Prepared Food	2.1%	5.4%	-1.3%
Food Service/Deli	1.4%	N/A	N/A
Shelf Stable Prepared Food	1.3%	1.3%	-4.2%
Dried Prepared Food	0.3%	N/A	N/A
Nut Butters	2.6%	9.9%	2.4%
Baby Food and Formula	7.6%	5.9%	-1.2%
Meat Alternatives/Veggie Burger	-10.5%	23.4%	9.9%
Tofu/Tempeh	2.8%	3.6%	3.8%
Shelf Stable Soup and Broth	5.7%	2.3%	-0.6%
Pasta Sauces	-3.5%	1.5%	4.5%
Desserts	0.8%	5.7%	3.1%
Total	3.6%	3.2%	0.3%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth

Note: INFRA growth calculated from SPINS organic category data

Beverages	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 – INFRA Store Growth
Refrigerated/Fresh Juices/Drinks and Kombucha	-0.1%	3.9%	-0.6%
Shelf Stable Juices and Drinks (including Coconut/Plant Waters)	7.3%	14.5%	10.1%
Beer, Wine, Liquor and Cocktails	-0.5%	-0.1%	0.3%
Soymilk	4.6%	21.1%	2.2%
Non-soy Dairy Alternatives (Rice, Almond Milk, etc.)	17.5%	13.1%	6.8%
Tea	5.1%	7.5%	0.1%
Coffee	6.9%	19.9%	15.4%
Coffee Substitutes/Cocoa	10.3%	24.8%	22.0%
Soft Drinks, Enhanced Drinks, Sparkling and Flavored Waters	12.7%	13.8%	-2.1%
Total	9.5%	9.2%	3.4%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth

Note: INFRA growth calculated from SPINS organic category data

Breads and Grains	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 – INFRA Store Growth
Refrigerated/Fresh/Frozen Bread	2.8%	5.2%	2.1%
Cookies	3.1%	2.4%	-3.9%
Crackers/Rice Cakes	5.7%	8.9%	3.6%
In-store Bakery	3.6%	N/A	N/A
Baking Needs	9.5%	16.9%	17.3%
Dry Breakfast Foods	6.1%	10.2%	0.9%
Rice, Grains and Potato	7.0%	12.4%	5.6%
Pasta	4.2%	5.8%	1.5%
Total	4.7%	7.8%	3.0%

Snack Foods	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 – INFRA Store Growth
Nutrition Bars/Gels	7.4%	14.9%	8.1%
Chocolate and Candy Bars	7.8%	16.7%	10.4%
Other Candy, Gum and Sweet Snacks	15.5%	31.7%	8.6%
Salty Snacks	1.6%	13.5%	7.1%
Nuts, Seeds, and Trail Mix	-0.3%	15.4%	10.0%
Total	5.4%	15.7%	9.0%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth
Note: INFRA growth calculated from SPINS organic category data

Meat, Fish and Poultry	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 – INFRA Store Growth
Total Meat, Fish and Poultry	10.0%	26.0%	11.5%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth
Note: INFRA growth calculated from SPINS organic category data

Condiments	2025		2026
	Total NBJ Growth	INFRA Store Growth	Q1 - INFRA Store Growth
Salad Dressing	-4.0%	3.8%	-11.1%
Salsa	-3.5%	-0.1%	-0.6%
Dips	-4.5%	-5.8%	-1.7%
Jams	3.9%	-0.8%	-5.7%
Sauces	-0.2%	12.8%	4.1%
Ketchup	3.6%	9.8%	1.5%
Other Condiments	5.3%	5.9%	1.2%
Spices and Seasonings	5.9%	9.6%	7.2%
Oil/Shortening and Vinegars	-0.5%	0.5%	-4.6%
Sweeteners	7.3%	4.2%	-2.0%
Total	2.8%	4.7%	-0.4%

Source: *Nutrition Business Journal* organic food and beverage category and subcategory growth

Note: INFRA growth calculated from SPINS organic category data