

Retail Scan Data

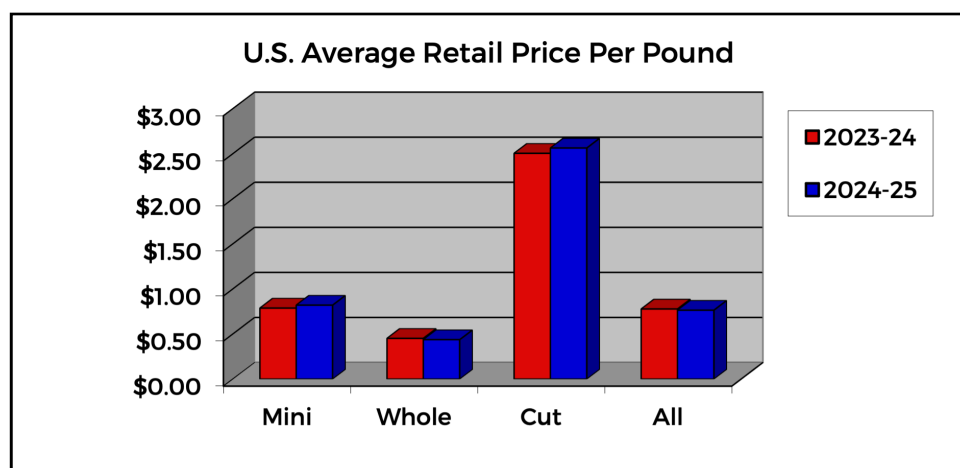
Compiled by the National Watermelon Promotion Board



Data current through
April 20, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	332,983,193	318,875,667	-4.2%	9.1%
Whole	2,571,823,301	2,715,984,097	5.6%	77.2%
Cut	483,442,884	483,486,539	0.0%	13.7%
Total	3,388,249,378	3,518,346,302	3.8%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.79	\$0.82
Whole	\$0.45	\$0.44
Cut	\$2.50	\$2.56
All	\$0.78	\$0.76



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.48	\$2.30	\$0.83
California 2024-25	\$0.49	\$2.37	\$0.95
Great Lakes 2023-24	\$0.46	\$3.32	\$0.67
Great Lakes 2024-25	\$0.45	\$3.52	\$0.66
Midsouth 2023-24	\$0.41	\$2.85	\$0.75
Midsouth 2024-25	\$0.41	\$2.94	\$0.74
Northeast 2023-24	\$0.46	\$2.12	\$0.93
Northeast 2024-25	\$0.41	\$2.20	\$0.93
Plains 2023-24	\$0.44	\$2.89	\$0.89
Plains 2024-25	\$0.42	\$2.73	\$0.85
Southcentral 2023-24	\$0.45	\$2.07	\$0.78
Southcentral 2024-25	\$0.44	\$2.09	\$0.79
Southeast 2023-24	\$0.45	\$2.95	\$0.80
Southeast 2024-25	\$0.45	\$2.87	\$0.84
West 2023-24	\$0.47	\$2.19	\$0.74
West 2024-25	\$0.45	\$2.41	\$0.77

The information shown throughout is derived from retail scan data supplied by Circana. It represents the universe of traditional grocery stores with sales of \$2M or more per year excluding some supercenters covering roughly 85% of the retail universe. This data reflects the 52-week period ending April 20, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

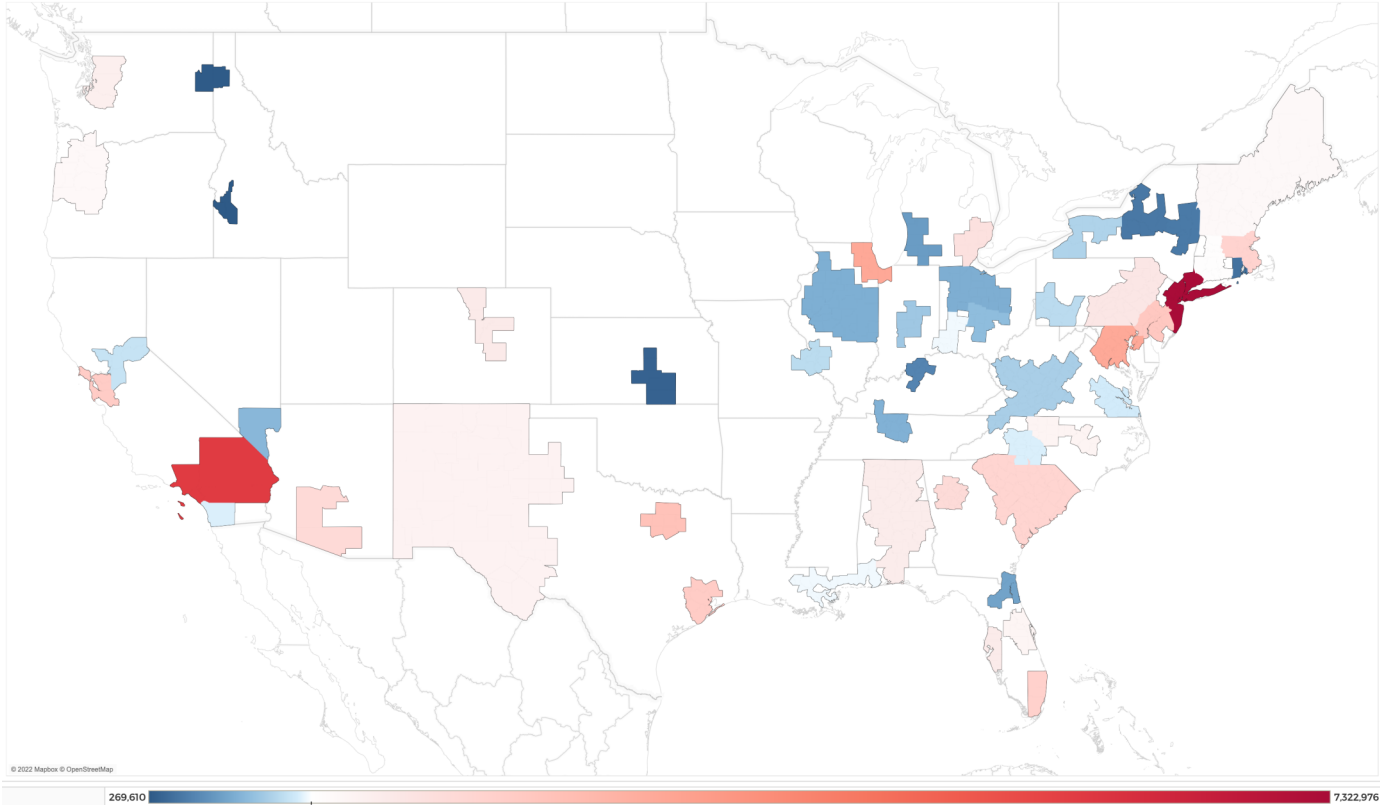
Jason Hanselman • Phone: (407) 925-5285 • Email: jasonh116@gmail.com

Scanner Data Regions



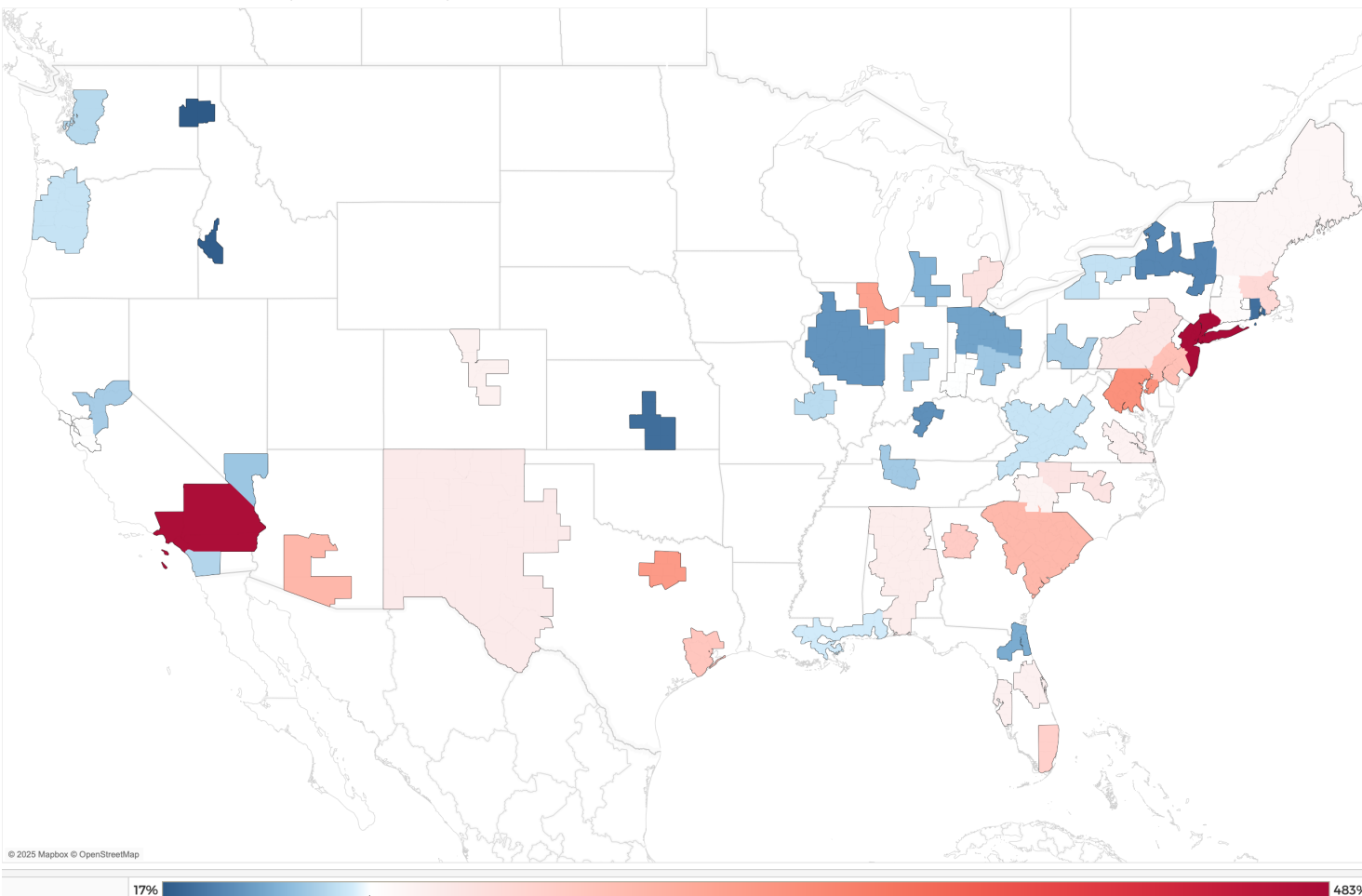
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	216,813,614	50,504,719	62,877,472	330,195,804
California 2024-25	239,054,731	50,637,684	59,322,138	349,014,553
Percent Growth	10.3%	0.3%	-5.7%	5.7%
2024-25 % of Total	68.5%	14.5%	17.0%	100.0%
Great Lakes 2023-24	392,326,256	35,435,353	44,894,408	472,656,016
Great Lakes 2024-25	416,952,992	34,739,864	43,543,671	495,236,527
Percent Growth	6.3%	-2.0%	-3.0%	4.8%
2024-25 % of Total	84.2%	7.0%	8.8%	100.0%
Midsouth 2023-24	396,823,820	51,640,271	39,794,104	488,258,194
Midsouth 2024-25	418,704,509	52,287,289	39,256,119	510,247,917
Percent Growth	5.5%	1.3%	-1.4%	4.5%
2024-25 % of Total	82.1%	10.2%	7.7%	100.0%
Northeast 2023-24	400,722,901	94,804,071	42,516,426	538,043,399
Northeast 2024-25	457,074,717	91,256,285	39,533,659	587,864,661
Percent Growth	14.1%	-3.7%	-7.0%	9.3%
2024-25 % of Total	77.8%	15.5%	6.7%	100.0%
Plains 2023-24	205,098,192	18,108,744	12,306,663	235,513,599
Plains 2024-25	213,358,999	18,624,531	12,024,598	244,008,128
Percent Growth	4.0%	2.8%	-2.3%	3.6%
2024-25 % of Total	87.4%	7.6%	4.9%	100.0%
Southcentral 2023-24	335,401,486	79,145,222	27,395,913	441,942,621
Southcentral 2024-25	326,333,594	81,593,897	36,997,159	434,924,649
Percent Growth	-2.7%	3.1%	-1.5%	-1.6%
2024-25 % of Total	75.0%	18.8%	6.2%	100.0%
Southeast 2023-24	348,647,835	99,914,878	45,800,331	494,363,044
Southeast 2024-25	356,847,599	106,450,672	43,177,467	506,475,738
Percent Growth	2.4%	6.5%	-5.7%	2.5%
2024-25 % of Total	70.5%	21.0%	8.5%	100.0%
West 2023-24	275,989,198	53,889,626	57,397,876	387,276,700
West 2024-25	287,656,957	47,896,317	55,020,856	390,574,129
Percent Growth	4.2%	-11.1%	-4.1%	0.9%
2024-25 % of Total	73.6%	12.3%	14.1%	100.0%

Number of Households per Market



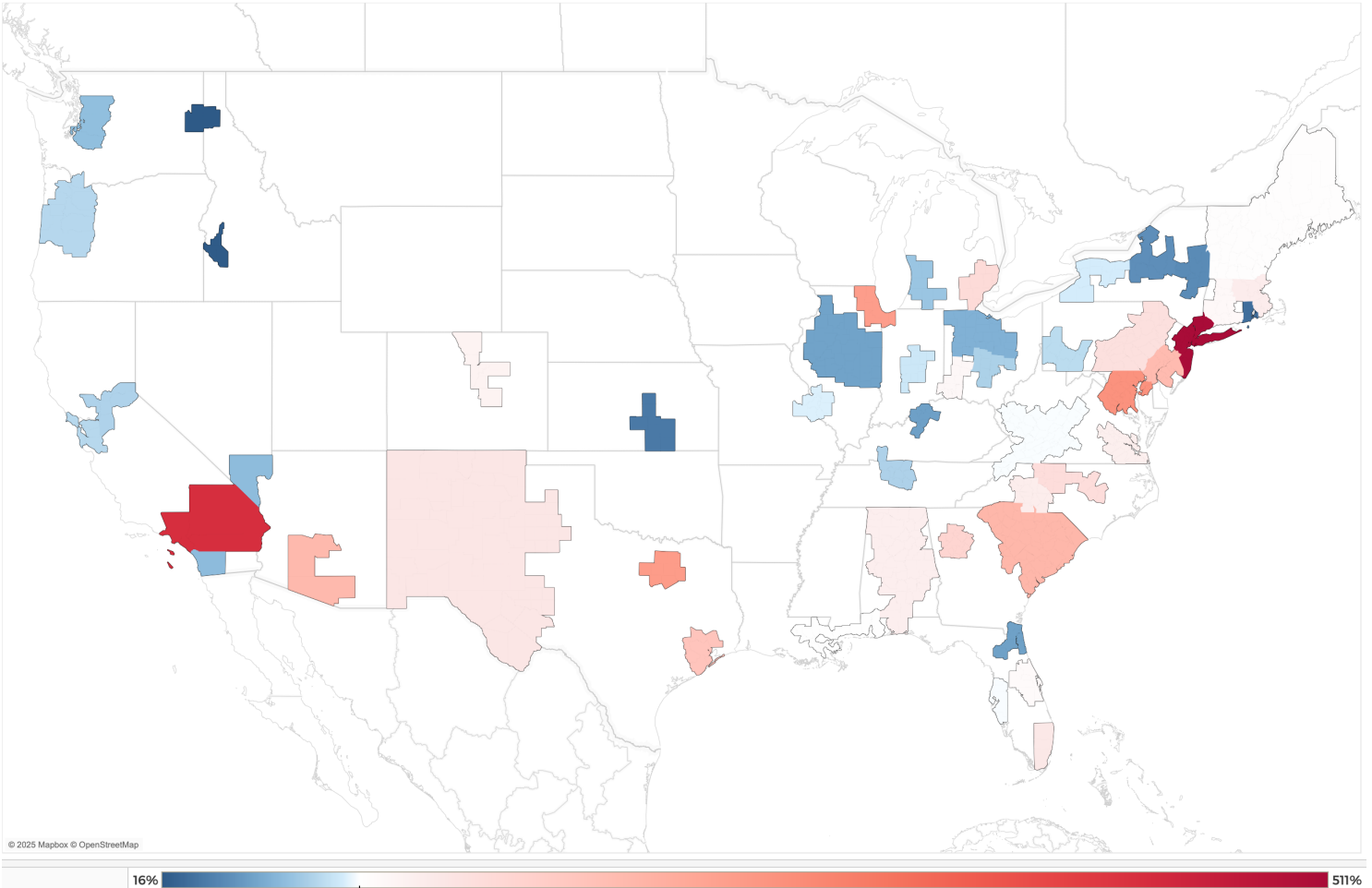
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814	CINCINNATI/DAYTON	3,057,108	1,211,497
DALLAS/FT. WORTH	7,387,718	2,673,203	CHARLOTTE	3,022,109	1,166,045
HOUSTON	6,974,818	2,431,415	RICHMOND/NORFOLK	3,005,465	1,146,783
PHILADELPHIA	6,677,352	2,523,950	ST. LOUIS	2,635,048	1,052,009
SAN FRANCISCO	6,614,206	2,424,893	PITTSBURGH	2,483,334	1,050,493
MIAMI/FT. LAUDERDALE	6,115,693	2,311,762	BUFFALO/ROCHESTER	2,465,162	1,003,811
BOSTON	5,816,699	2,252,721	INDIANAPOLIS	2,394,786	933,721
SOUTH CAROLINA	5,685,393	2,211,278	ROANOKE	2,374,132	975,483
ATLANTA	5,581,621	2,061,905	LAS VEGAS	2,267,612	833,639
PHOENIX/TUCSON	5,551,224	2,078,257	COLUMBUS	2,186,812	865,297
DETROIT	4,860,654	1,906,690	NASHVILLE	2,065,127	795,655
HARRISBURG/SCRANTON	4,574,232	1,779,694	TOLEDO	1,992,358	777,879
DENVER	4,313,555	1,698,222	PEORIA/SPRINGFIELD	1,952,702	782,525
BIRMINGHAM/MONTGOMERY	4,204,001	1,655,159	JACKSONVILLE	1,829,816	716,122
WEST TEX/NEW MEXICO	4,134,572	1,509,632	GRAND RAPIDS	1,775,105	673,617
TAMPA	4,020,265	1,677,147	LOUISVILLE	1,318,292	527,730
SEATTLE	3,959,531	1,580,072	SYRACUSE	1,152,592	453,783
RALEIGH/GREENSBORO	3,763,913	1,481,572	ALBANY	1,142,493	465,633
ORLANDO	3,758,407	1,460,241	PROVIDENCE	1,060,757	416,922
PORTLAND	3,512,264	1,376,992	WICHITA	831,372	322,437
NEW ENGLAND	3,402,121	1,386,532	BOISE	743,617	269,610
SAN DIEGO	3,313,042	1,167,276	SPOKANE	694,837	275,315

Total Pounds Sold at Retail, Last 52 Weeks, Indexed to Median Market



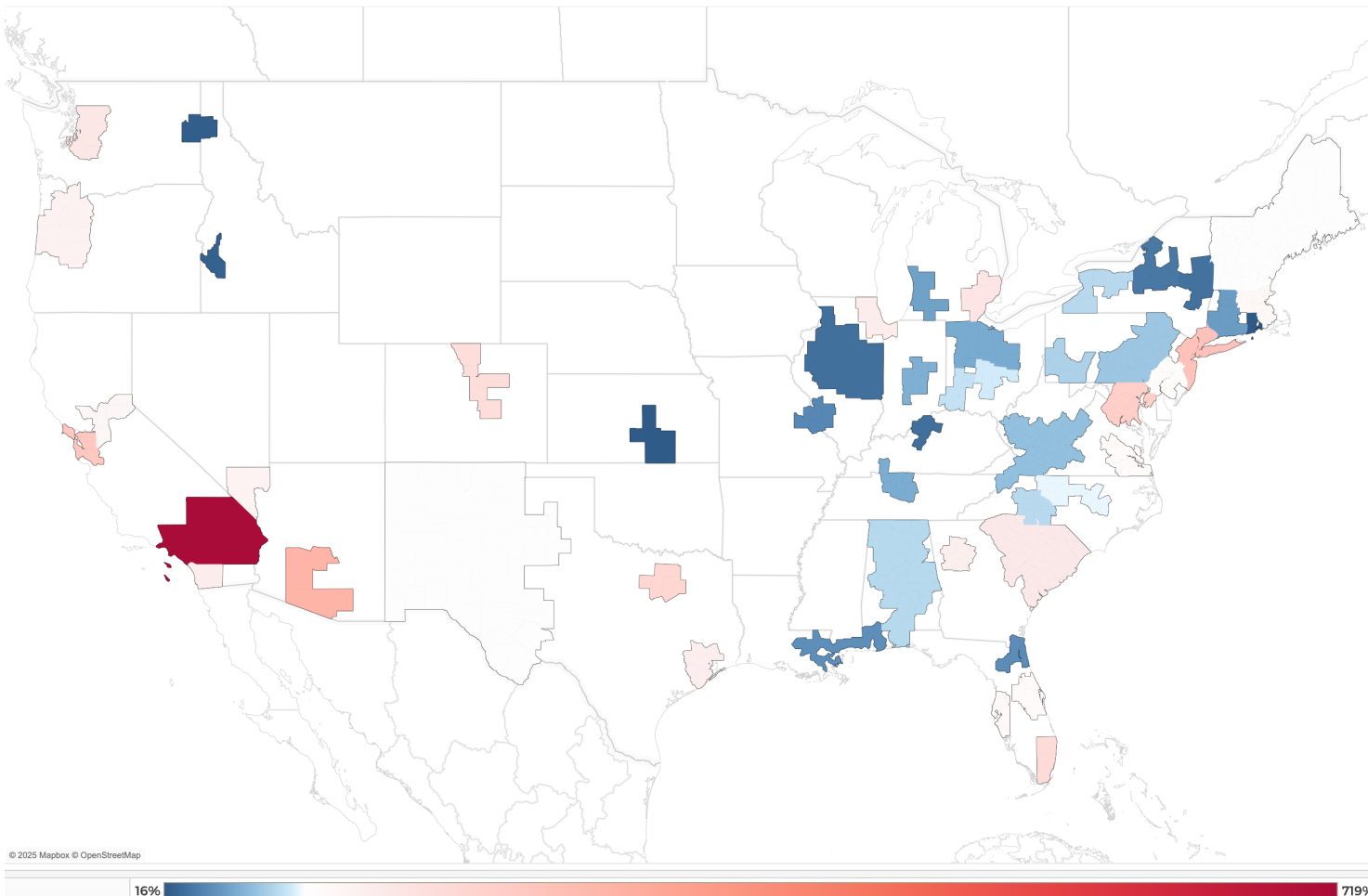
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PROVIDENCE	9,032,436	10,550,106	16.8%	BIRMINGHAM/MONTGOMERY	43,944,145	45,858,093	4.4%
LOUISVILLE	14,787,049	16,897,638	14.3%	SAN DIEGO	28,725,122	29,841,889	3.9%
ST. LOUIS	27,407,326	30,771,598	12.3%	INDIANAPOLIS	27,831,124	28,818,786	3.5%
NEW YORK	158,346,308	177,619,449	12.2%	CHICAGO	86,516,094	89,134,178	3.0%
DETROIT	46,244,366	51,775,411	12.0%	TAMPA	43,015,329	44,072,151	2.5%
BOISE	6,493,630	7,175,868	10.5%	CHARLOTTE	41,383,797	42,355,031	2.3%
BOSTON	51,549,072	56,728,232	10.0%	RICHMOND/NORFOLK	42,337,032	43,129,585	1.9%
HARTFORD/SPRINGFIELD	34,943,666	38,198,452	9.3%	SOUTH CAROLINA	74,926,827	76,304,669	1.8%
COLUMBUS	25,089,895	27,207,600	8.4%	PHOENIX/TUCSON	75,434,365	76,812,785	1.8%
NEW ENGLAND	37,842,153	40,950,046	8.2%	SACRAMENTO	27,805,920	28,253,991	1.6%
LOS ANGELES	162,382,979	175,418,515	8.0%	LAS VEGAS	26,418,498	26,836,793	1.6%
PITTSBURGH	26,546,226	28,551,154	7.6%	ORLANDO	43,459,468	44,141,563	1.6%
BUFFALO/ROCHESTER	29,746,915	31,984,020	7.5%	ATLANTA	64,157,550	64,456,586	0.5%
PHILADELPHIA	66,141,914	71,040,976	7.4%	RALEIGH/GREENSBORO	50,146,477	50,380,082	0.5%
SYRACUSE	13,907,398	14,885,797	7.0%	BALTIMORE/WASHINGTON	98,213,071	98,448,617	0.2%
DENVER	40,988,596	43,858,032	7.0%	JACKSONVILLE	21,827,014	21,850,814	0.1%
ALBANY	13,668,771	14,580,397	6.7%	SAN FRANCISCO	36,893,687	36,860,126	-0.1%
ROANOKE	30,553,022	32,545,557	6.5%	NEW ORLEANS/MOBILE	34,321,971	34,001,817	-0.9%
TOLEDO	19,134,423	20,348,883	6.3%	WEST TEX/NEW MEXICO	47,794,383	47,038,895	-1.6%
CINCINNATI/DAYTON	34,655,405	36,722,936	6.0%	WICHITA	10,481,946	10,288,621	-1.8%
GRAND RAPIDS	21,898,032	23,049,380	5.3%	SPOKANE	6,575,306	6,347,896	-3.5%
PEORIA/SPRINGFIELD	16,843,498	17,677,681	5.0%	PORTLAND	33,670,382	32,321,925	-4.0%
HARRISBURG/SCRANTON	46,295,386	48,510,955	4.8%	DALLAS/FT. WORTH	97,193,050	92,780,275	-4.5%
NASHVILLE	26,410,013	27,633,246	4.6%	HOUSTON	71,667,238	67,887,317	-5.3%
MIAMI/FT. LAUDERDALE	59,691,307	62,332,135	4.4%	SEATTLE	33,654,998	30,416,427	-9.6%

Whole Pounds Sold at Retail, Last 52 Weeks, Indexed to Median Market



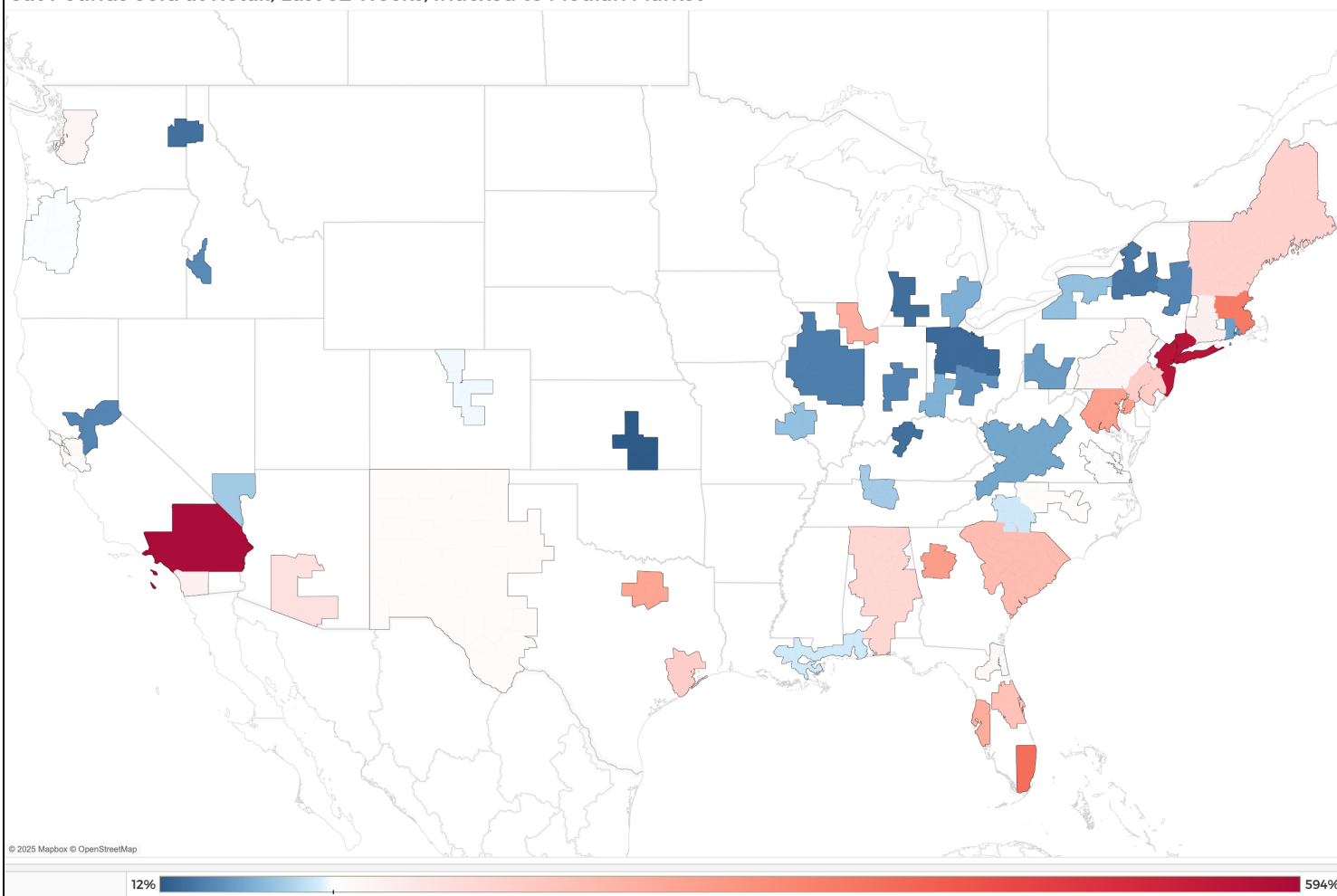
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PROVIDENCE	5,757,653	7,502,384	30.3%	TOLEDO	16,104,722	17,085,342	6.1%
BOSTON	28,133,910	35,052,859	24.6%	CHICAGO	67,641,846	71,321,437	5.4%
NEW YORK	117,522,009	141,087,001	20.1%	NASHVILLE	20,744,763	21,810,532	5.1%
NEW ENGLAND	23,696,886	28,076,483	18.5%	INDIANAPOLIS	23,578,118	24,789,291	5.1%
ST. LOUIS	21,901,628	25,935,550	18.4%	BIRMINGHAM/MONTGOMERY	32,801,953	34,313,128	4.6%
LOUISVILLE	12,594,656	14,665,673	16.4%	SAN FRANCISCO	21,734,188	22,710,471	4.5%
HARTFORD/SPRINGFIELD	26,108,389	30,135,629	15.4%	CHARLOTTE	33,635,256	34,829,673	3.6%
DETROIT	37,512,615	42,892,087	14.3%	HARRISBURG/SCRANTON	38,960,395	40,310,602	3.5%
LOS ANGELES	104,944,021	119,190,917	13.6%	BALTIMORE/WASHINGTON	74,587,369	76,572,381	2.7%
BOISE	4,009,880	4,528,592	12.9%	SACRAMENTO	21,437,137	21,934,435	2.3%
PHOENIX/TUCSON	52,437,818	58,559,914	11.7%	ORLANDO	28,755,869	29,371,390	2.1%
SAN DIEGO	16,558,627	18,374,838	11.0%	RICHMOND/NORFOLK	33,579,963	34,105,835	1.6%
PHILADELPHIA	52,206,564	57,704,638	10.5%	SOUTH CAROLINA	58,885,803	59,639,358	1.3%
COLUMBUS	19,687,745	21,684,475	10.1%	JACKSONVILLE	14,610,458	14,789,033	1.2%
CINCINNATI/DAYTON	27,767,664	30,512,521	9.9%	RALEIGH/GREENSBORO	41,219,873	41,705,143	1.2%
SYRACUSE	11,281,454	12,264,522	8.7%	TAMPA	27,011,063	27,244,744	0.9%
ALBANY	10,802,091	11,734,497	8.6%	NEW ORLEANS/MOBILE	27,797,693	27,896,233	0.4%
BUFFALO/ROCHESTER	23,632,372	25,552,235	8.1%	WEST TEX/NEW MEXICO	37,873,728	37,901,182	0.1%
LAS VEGAS	17,123,733	18,495,787	8.0%	SPOKANE	4,492,712	4,481,399	-0.3%
GRAND RAPIDS	18,372,434	19,839,416	8.0%	ATLANTA	46,039,279	45,519,547	-1.1%
PEORIA/SPRINGFIELD	13,962,173	15,069,407	7.9%	WICHITA	9,380,235	9,111,496	-2.9%
PITTSBURGH	21,465,464	23,163,776	7.9%	PORTLAND	23,395,386	22,598,211	-3.4%
MIAMI/FT. LAUDERDALE	34,560,182	37,045,603	7.2%	DALLAS/FT. WORTH	76,075,566	72,075,099	-5.3%
ROANOKE	25,689,929	27,283,690	6.2%	HOUSTON	57,117,614	53,406,552	-6.5%
DENVER	30,517,921	32,410,419	6.2%	SEATTLE	20,925,992	18,946,547	-9.5%

Mini Pounds Sold at Retail, Last 52 Weeks, Indexed to Median Market



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
HARRISBURG/SCRANTON	2,210,376	2,817,546	27.5%	DALLAS/FT. WORTH	8,002,484	7,547,962	-5.7%
DENVER	5,705,981	6,784,357	18.9%	TAMPA	4,655,091	4,383,457	-5.8%
WICHITA	542,940	624,344	15.0%	LAS VEGAS	5,129,734	4,821,067	-6.0%
ROANOKE	2,435,846	2,679,701	10.0%	BALTIMORE/WASHINGTON	8,890,342	8,298,162	-6.7%
PITTSBURGH	2,763,470	3,032,576	9.7%	GRAND RAPIDS	2,231,882	2,081,759	-6.7%
TOLEDO	2,066,672	2,239,234	8.3%	RALEIGH/GREENSBORO	3,988,550	3,715,652	-6.8%
SPOKANE	643,977	692,149	7.5%	LOUISVILLE	1,191,056	1,082,457	-9.1%
PHILADELPHIA	3,859,140	4,124,040	6.9%	WEST TEX/NEW MEXICO	4,431,467	4,009,597	-9.5%
SEATTLE	5,504,106	5,880,831	6.8%	MIAMI/FT. LAUDERDALE	7,788,681	7,043,267	-9.6%
RICHMOND/NORFOLK	3,941,440	4,195,011	6.4%	BOSTON	5,087,946	4,538,455	-10.8%
HOUSTON	4,962,307	5,273,758	6.3%	BOISE	881,547	778,720	-11.7%
BUFFALO/ROCHESTER	3,001,038	3,176,398	5.8%	ALBANY	1,284,541	1,125,882	-12.4%
PORTLAND	4,803,254	4,969,806	3.5%	ORLANDO	4,902,357	4,284,328	-12.6%
COLUMBUS	3,439,967	3,552,838	3.3%	SAN FRANCISCO	10,367,431	8,960,108	-13.6%
SOUTH CAROLINA	5,506,419	5,686,479	3.3%	INDIANAPOLIS	2,757,859	2,342,144	-15.1%
ATLANTA	5,028,222	5,125,576	1.9%	NEW YORK	11,202,327	9,395,681	-16.1%
DETROIT	6,113,852	6,081,242	-0.5%	CINCINNATI/DAYTON	4,019,373	3,365,832	-16.3%
CHICAGO	5,509,170	5,402,592	-1.9%	JACKSONVILLE	2,050,055	1,666,164	-18.7%
SACRAMENTO	4,695,457	4,601,469	-2.0%	NEW ORLEANS/MOBILE	2,155,377	1,727,354	-19.9%
SAN DIEGO	5,657,003	5,488,911	-3.0%	PEORIA/SPRINGFIELD	1,349,877	1,080,682	-19.9%
NASHVILLE	2,350,876	2,278,637	-3.1%	PROVIDENCE	785,090	621,798	-20.8%
CHARLOTTE	3,323,534	3,203,629	-3.6%	HARTFORD/SPRINGFIELD	2,498,700	1,972,750	-21.0%
BIRMINGHAM/MONTGOMERY	3,324,849	3,179,748	-4.4%	NEW ENGLAND	5,128,484	4,004,772	-21.9%
SYRACUSE	1,308,110	1,242,937	-5.0%	PHOENIX/TUCSON	14,113,091	10,907,830	-22.7%
LOS ANGELES	29,405,667	27,750,342	-5.6%	ST. LOUIS	2,524,995	1,564,734	-38.0%

Cut Pounds Sold at Retail, Last 52 Weeks, Indexed to Median Market



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BOISE	1,602,204	1,868,555	16.6%	DALLAS/FT. WORTH	13,114,999	13,157,214	0.3%
LOUISVILLE	1,001,337	1,149,509	14.8%	RICHMOND/NORFOLK	4,815,629	4,828,740	0.3%
INDIANAPOLIS	1,495,148	1,687,351	12.9%	NEW ORLEANS/MOBILE	4,368,901	4,378,230	0.2%
ST. LOUIS	2,980,703	3,271,314	9.7%	PEORIA/SPRINGFIELD	1,531,448	1,527,592	-0.3%
TAMPA	11,349,175	12,443,950	9.6%	CINCINNATI/DAYTON	2,868,368	2,844,583	-0.8%
ALBANY	1,582,138	1,720,018	8.7%	WICHITA	558,771	552,780	-1.1%
SAN FRANCISCO	4,792,069	5,189,547	8.3%	NEW ENGLAND	9,016,783	8,868,791	-1.6%
DETROIT	2,617,899	2,802,082	7.0%	DENVER	4,764,693	4,663,257	-2.1%
BIRMINGHAM/MONTGOMERY	7,817,343	8,365,217	7.0%	CHARLOTTE	4,425,007	4,321,729	-2.3%
ORLANDO	9,801,242	10,485,845	7.0%	PROVIDENCE	2,489,692	2,425,924	-2.6%
NASHVILLE	3,314,373	3,544,076	6.9%	HARTFORD/SPRINGFIELD	6,336,577	6,090,073	-3.9%
ROANOKE	2,427,247	2,582,166	6.4%	HOUSTON	9,587,317	9,207,007	-4.0%
TOLEDO	963,029	1,024,308	6.4%	BOSTON	18,327,215	17,136,918	-6.5%
ATLANTA	13,090,049	13,811,463	5.5%	WEST TEX/NEW MEXICO	5,489,188	5,128,116	-6.6%
MIAMI/FT. LAUDERDALE	17,342,445	18,243,265	5.2%	CHICAGO	13,365,078	12,410,149	-7.1%
HARRISBURG/SCRANTON	5,124,616	5,382,807	5.0%	BALTIMORE/WASHINGTON	14,735,359	13,578,073	-7.9%
SYRACUSE	1,317,835	1,378,339	4.6%	SAN DIEGO	6,509,492	5,978,140	-8.2%
BUFFALO/ROCHESTER	3,113,505	3,255,386	4.6%	NEW YORK	29,621,972	27,136,766	-8.4%
JACKSONVILLE	5,166,501	5,395,617	4.4%	PHILADELPHIA	10,076,211	9,212,298	-8.6%
SOUTH CAROLINA	10,534,605	10,978,833	4.2%	GRAND RAPIDS	1,293,716	1,128,205	-12.8%
SACRAMENTO	1,673,326	1,718,087	2.7%	PORTLAND	5,471,742	4,753,907	-13.1%
PITTSBURGH	2,317,293	2,354,802	1.6%	LAS VEGAS	4,165,031	3,519,939	-15.5%
LOS ANGELES	28,033,290	28,477,257	1.6%	PHOENIX/TUCSON	8,883,456	7,345,042	-17.3%
RALEIGH/GREENSBORO	4,938,054	4,959,287	0.4%	SPOKANE	1,438,617	1,174,348	-18.4%
COLUMBUS	1,962,182	1,970,287	0.4%	SEATTLE	7,224,900	5,589,049	-22.6%