

Retail Scan Data

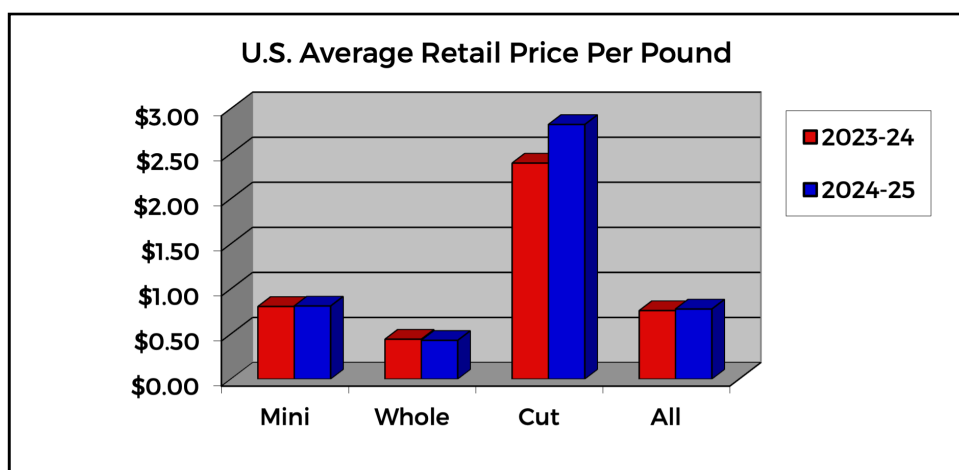
Compiled by the National Watermelon Promotion Board



Data current through
July 13, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	327,794,791	323,129,485	-1.4%	9.4%
Whole	2,711,285,074	2,681,307,779	-1.1%	77.6%
Cut	516,060,684	450,473,032	-12.7%	13.0%
Total	3,555,140,550	3,454,910,296	-2.8%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.80	\$0.81
Whole	\$0.44	\$0.43
Cut	\$2.40	\$2.82
All	\$0.76	\$0.78



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.17	\$0.88
California 2024-25	\$0.49	\$2.60	\$0.92
Great Lakes 2023-24	\$0.45	\$3.37	\$0.69
Great Lakes 2024-25	\$0.43	\$3.59	\$0.65
Midsouth 2023-24	\$0.41	\$2.85	\$0.75
Midsouth 2024-25	\$0.40	\$3.12	\$0.72
Northeast 2023-24	\$0.42	\$2.10	\$0.93
Northeast 2024-25	\$0.41	\$2.34	\$0.89
Plains 2023-24	\$0.43	\$2.78	\$0.87
Plains 2024-25	\$0.41	\$2.64	\$0.85
Southcentral 2023-24	\$0.45	\$1.81	\$0.78
Southcentral 2024-25	\$0.43	\$2.62	\$0.80
Southeast 2023-24	\$0.45	\$2.91	\$0.82
Southeast 2024-25	\$0.44	\$3.02	\$0.82
West 2023-24	\$0.46	\$1.97	\$0.75
West 2024-25	\$0.45	\$2.95	\$0.82

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 July 13, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

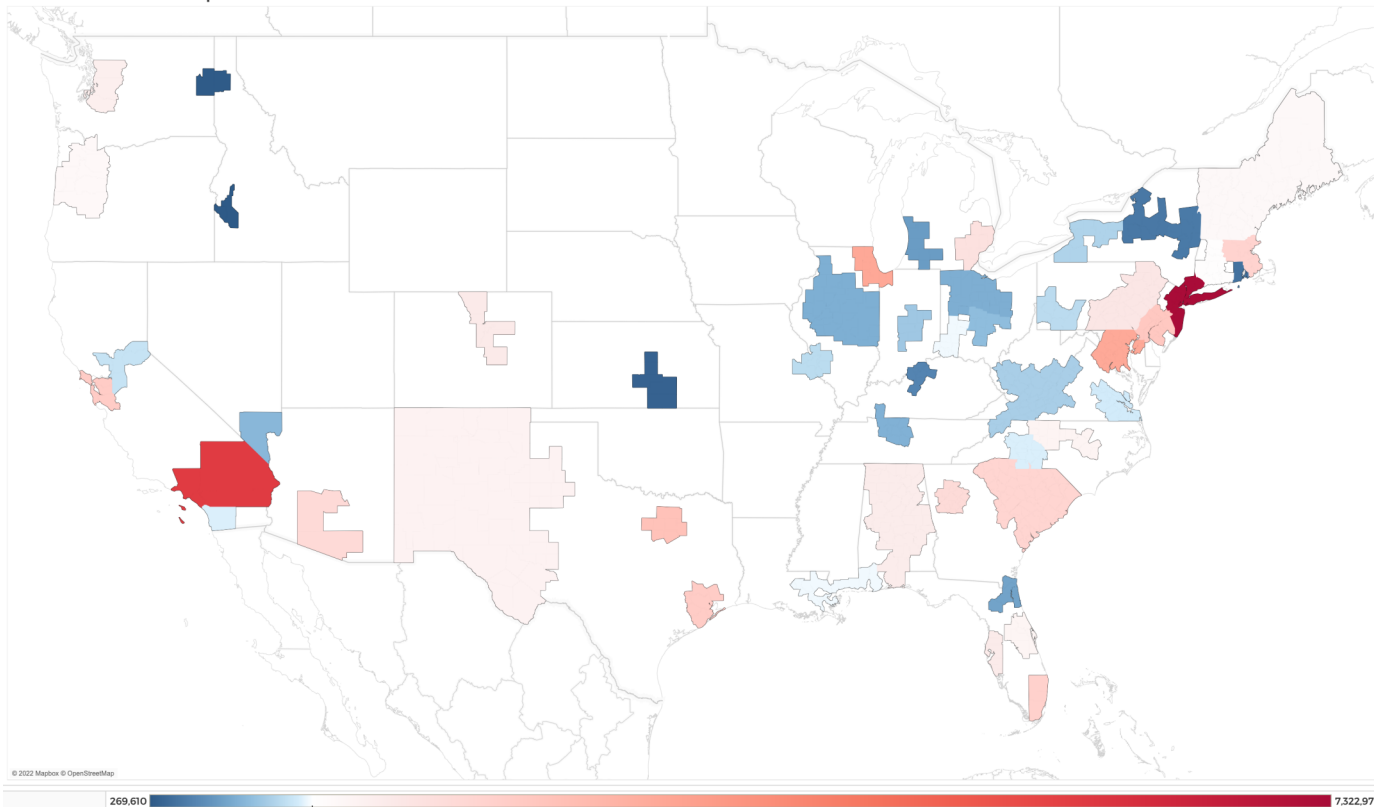
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Scanner Data Regions



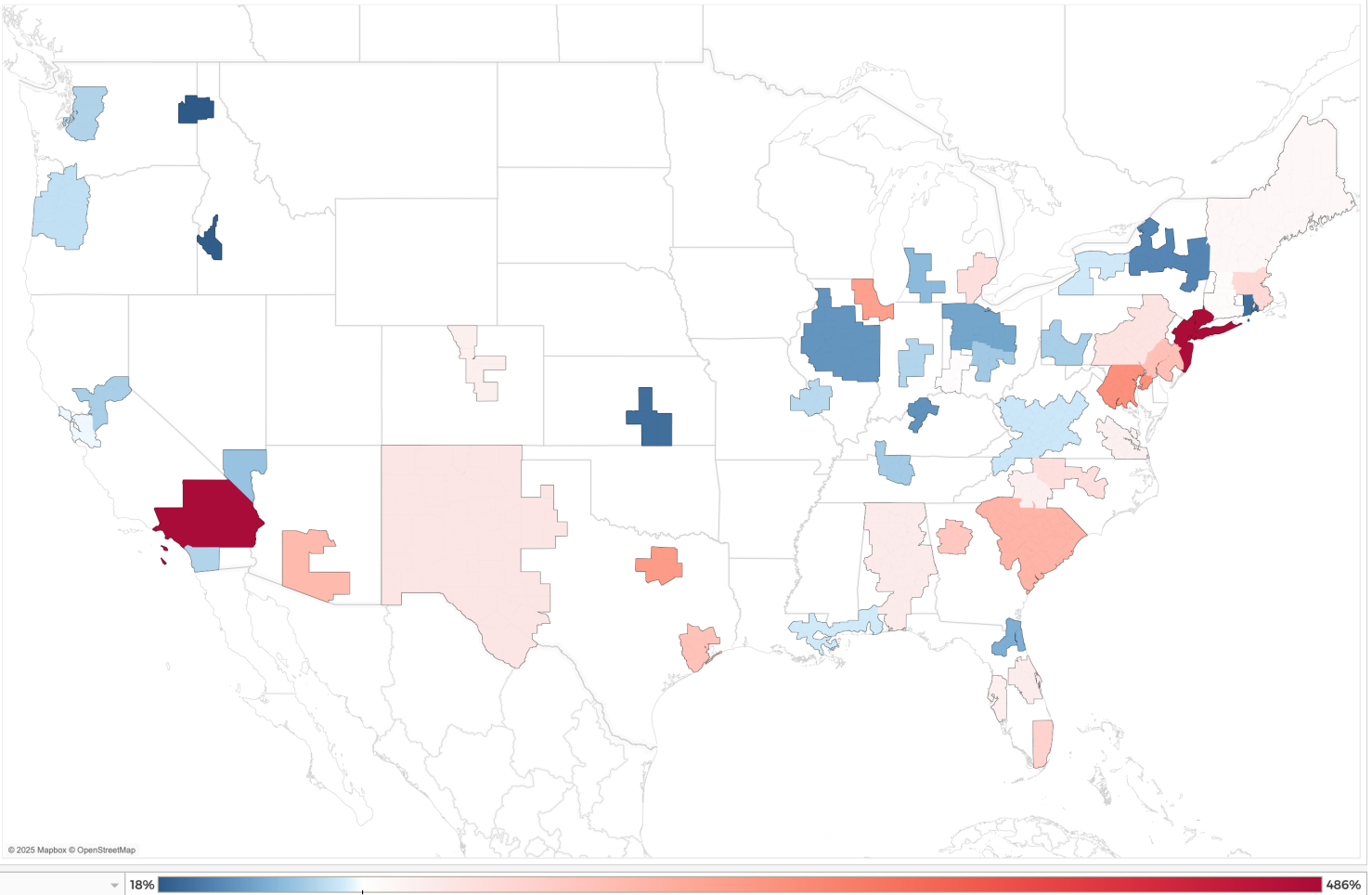
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	231,295,551	55,406,931	61,554,034	348,256,515
California 2024-25	231,729,601	46,621,248	61,155,088	339,505,937
Percent Growth	0.2%	-15.9%	-0.6%	-2.5%
2024-25 % of Total	68.3%	13.7%	18.0%	100.0%
Great Lakes 2023-24	411,407,250	35,161,783	41,710,794	488,279,827
Great Lakes 2024-25	409,678,338	35,343,212	46,598,758	491,620,308
Percent Growth	-0.4%	0.5%	11.7%	0.7%
2024-25 % of Total	83.3%	7.2%	9.5%	100.0%
Midsouth 2023-24	422,794,798	55,931,063	40,341,896	519,067,758
Midsouth 2024-25	412,763,886	53,401,042	40,315,651	506,480,579
Percent Growth	-2.4%	-4.5%	-0.1%	-2.4%
2024-25 % of Total	81.5%	10.5%	8.0%	100.0%
Northeast 2023-24	449,657,765	96,240,431	42,046,909	587,945,105
Northeast 2024-25	443,497,217	85,625,731	41,029,333	570,152,281
Percent Growth	-1.4%	-11.0%	-2.4%	-3.0%
2024-25 % of Total	77.8%	15.0%	7.2%	100.0%
Plains 2023-24	209,042,099	18,495,361	12,111,410	239,648,870
Plains 2024-25	215,913,173	19,387,979	13,048,885	248,350,037
Percent Growth	3.3%	4.8%	7.7%	3.6%
2024-25 % of Total	86.9%	7.8%	5.3%	100.0%
Southcentral 2023-24	338,107,341	91,014,709	27,538,989	456,661,039
Southcentral 2024-25	328,531,405	64,786,970	27,211,952	420,530,327
Percent Growth	-2.8%	-28.8%	-1.2%	-7.9%
2024-25 % of Total	78.1%	15.4%	6.5%	100.0%
Southeast 2023-24	365,778,760	104,190,354	46,731,826	516,700,940
Southeast 2024-25	351,119,961	105,476,830	42,935,646	499,532,437
Percent Growth	-4.0%	1.2%	-8.1%	-3.3%
2024-25 % of Total	70.3%	21.1%	8.6%	100.0%
West 2023-24	283,201,510	59,620,052	55,758,932	398,580,494
West 2024-25	288,074,199	39,830,020	50,834,172	378,738,391
Percent Growth	1.7%	-33.2%	-8.8%	-5.0%
2024-25 % of Total	76.1%	10.5%	13.4%	100.0%

Number of Households per Market



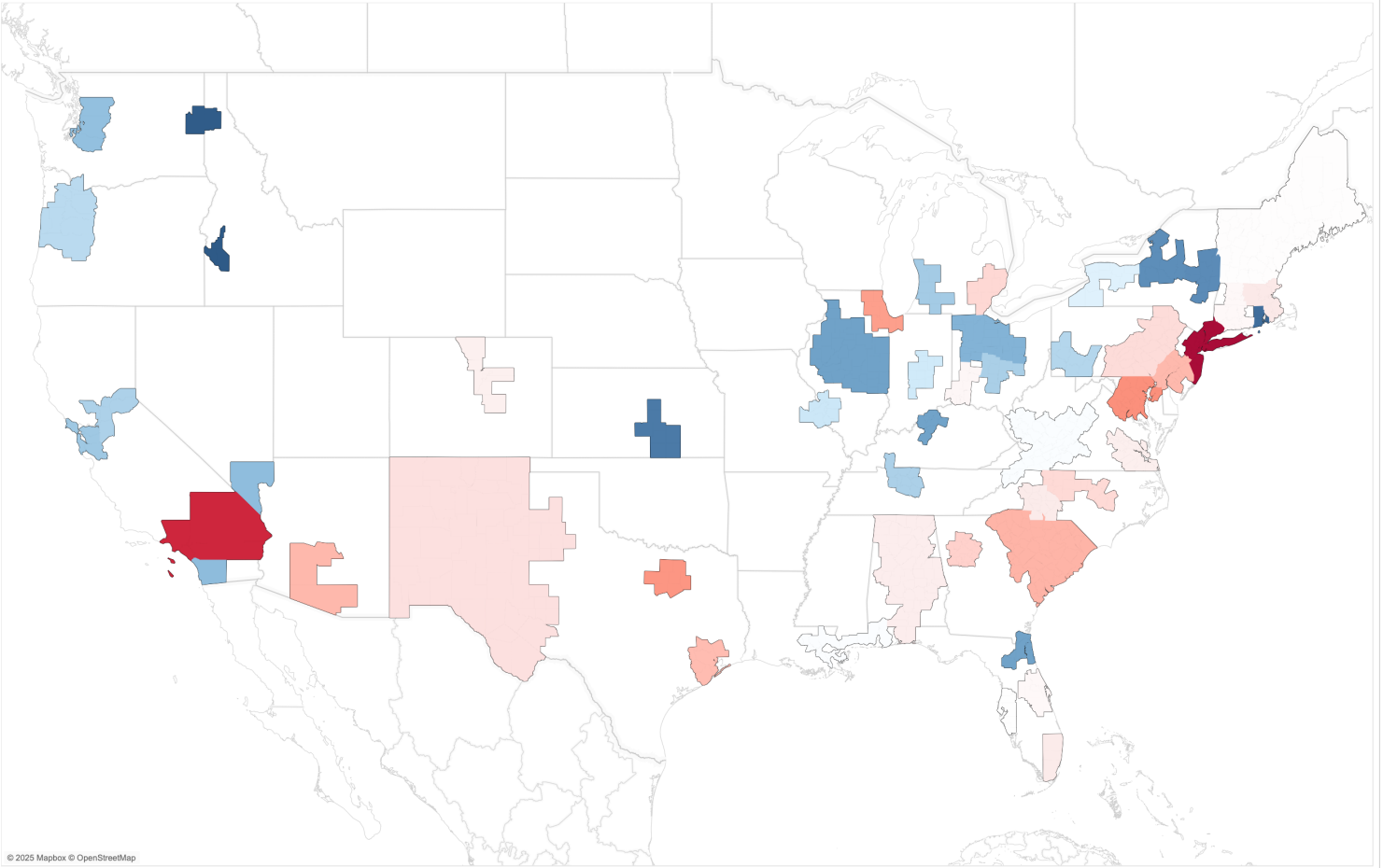
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814	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
LOUISVILLE	15,534,093	17,021,553	9.6%	ATLANTA	66,204,904	64,318,523	-2.8%
GRAND RAPIDS	21,770,433	23,679,827	8.8%	BIRMINGHAM/MONTGOMERY	46,525,106	44,917,969	-3.5%
DETROIT	48,607,818	51,824,533	6.6%	NEW YORK	177,677,671	171,104,606	-3.7%
BUFFALO/ROCHESTER	31,639,194	32,377,990	2.3%	JACKSONVILLE	22,516,704	21,672,443	-3.7%
INDIANAPOLIS	28,146,543	28,744,480	2.1%	PITTSBURGH	28,666,565	27,581,652	-3.8%
HARRISBURG/SCRANTON	48,144,656	48,969,933	1.7%	BOISE	7,110,968	6,830,631	-3.9%
PEORIA/SPRINGFIELD	17,247,343	17,416,408	1.0%	SOUTH CAROLINA	78,827,156	75,676,049	-4.0%
TOLEDO	19,996,627	20,170,366	0.9%	PHILADELPHIA	71,588,371	68,726,276	-4.0%
CINCINNATI/DAYTON	36,210,829	36,523,887	0.9%	HARTFORD/SPRINGFIELD	38,655,275	37,049,343	-4.2%
COLUMBUS	26,361,034	26,570,582	0.8%	BOSTON	57,352,654	54,829,776	-4.4%
WEST TEX/NEW MEXICO	47,418,628	47,661,506	0.5%	NEW ENGLAND	41,308,660	39,344,754	-4.8%
ST. LOUIS	29,522,349	29,650,901	0.4%	WICHITA	10,834,692	10,239,996	-5.5%
LOS ANGELES	172,870,641	172,734,699	-0.1%	SAN DIEGO	30,491,242	28,712,526	-5.8%
ALBANY	14,550,739	14,468,687	-0.6%	MIAMI/FT. LAUDERDALE	62,972,393	59,230,964	-5.9%
SYRACUSE	14,750,127	14,622,679	-0.9%	HOUSTON	72,909,920	68,253,157	-6.4%
SPOKANE	6,396,980	6,340,868	-0.9%	CHICAGO	92,524,784	86,555,875	-6.5%
ORLANDO	44,863,867	44,077,905	-1.8%	RICHMOND/NORFOLK	44,967,263	42,015,643	-6.6%
NASHVILLE	27,478,363	26,970,850	-1.8%	PHOENIX/TUCSON	78,476,380	72,866,054	-7.1%
TAMPA	44,168,320	43,347,314	-1.9%	PORTLAND	33,229,947	30,760,815	-7.4%
PROVIDENCE	10,484,531	10,285,241	-1.9%	BALTIMORE/WASHINGTON	104,102,650	95,521,881	-8.2%
ROANOKE	32,711,433	32,066,746	-2.0%	SAN FRANCISCO	37,891,068	34,500,074	-8.9%
CHARLOTTE	44,030,131	43,002,434	-2.3%	DALLAS/FT. WORTH	98,761,316	89,870,706	-9.0%
SACRAMENTO	28,432,461	27,679,702	-2.6%	NEW ORLEANS/MOBILE	35,867,077	32,514,011	-9.3%
RALEIGH/GREENSBORO	52,682,601	51,239,692	-2.7%	LAS VEGAS	28,129,719	25,382,151	-9.8%
DENVER	44,131,190	42,904,804	-2.8%	SEATTLE	33,395,421	28,461,774	-14.8%

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



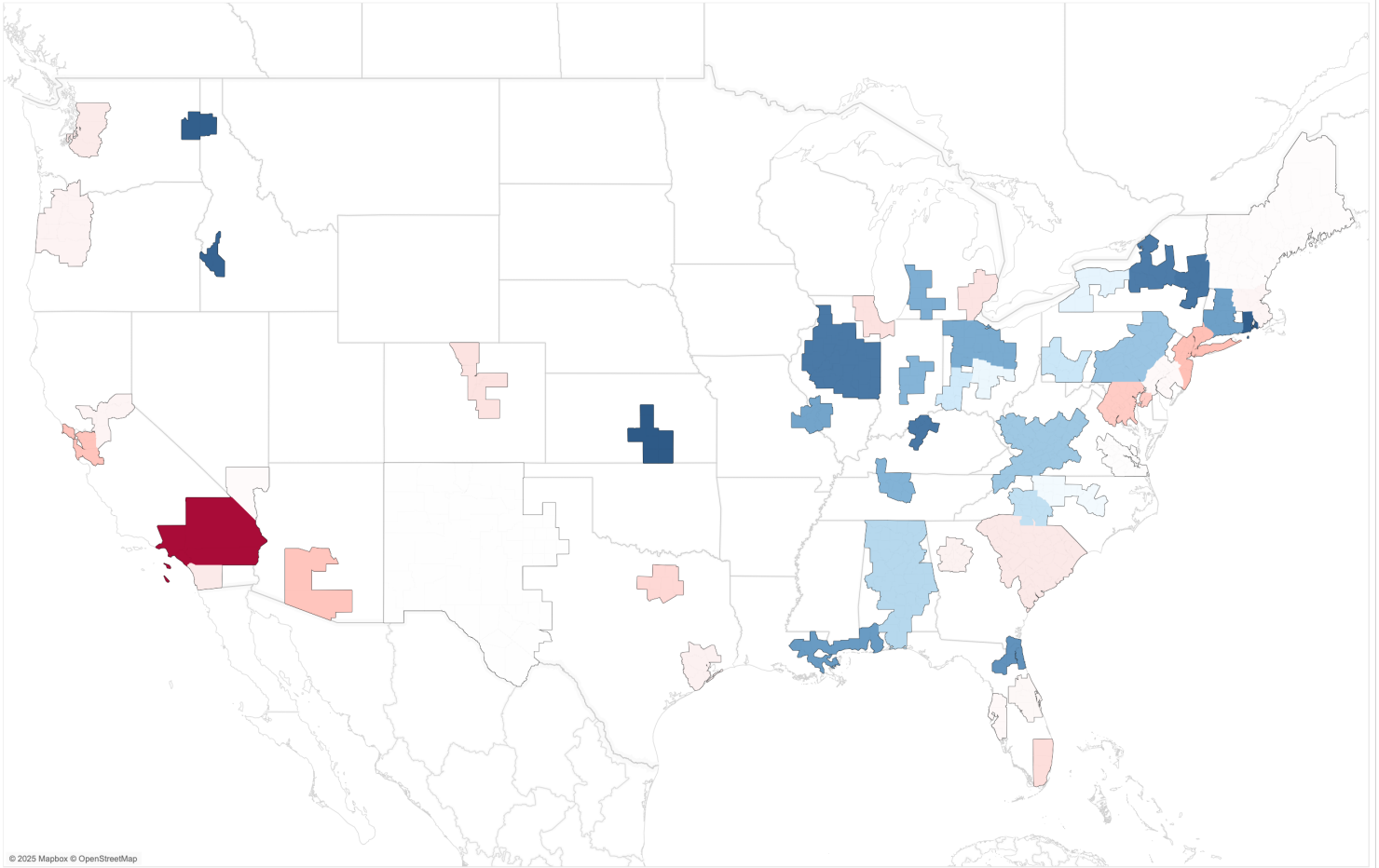
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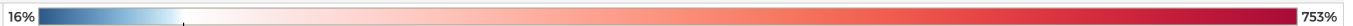
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Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
SPOKANE	4,237,129	4,761,719	12.4%	ST. LOUIS	24,574,668	24,135,705	-1.8%
GRAND RAPIDS	18,438,131	20,278,906	10.0%	ORLANDO	29,805,184	29,253,287	-1.9%
LOUISVILLE	13,411,424	14,663,674	9.3%	SYRACUSE	12,137,224	11,909,869	-1.9%
DETROIT	40,400,908	42,820,860	6.0%	NEW YORK	138,143,637	135,159,951	-2.2%
BOISE	4,262,278	4,476,466	5.0%	HARTFORD/SPRINGFIELD	29,954,020	29,224,263	-2.4%
LOS ANGELES	112,995,898	118,406,572	4.8%	CHARLOTTE	35,578,697	34,699,445	-2.5%
WEST TEX/NEW MEXICO	37,487,940	38,948,121	3.9%	RALEIGH/GREENSBORO	43,181,531	42,043,392	-2.6%
BOSTON	33,942,231	35,188,677	3.7%	ATLANTA	47,222,212	45,966,358	-2.7%
SAN DIEGO	17,613,857	18,082,980	2.7%	NASHVILLE	21,650,680	21,073,345	-2.7%
PROVIDENCE	7,269,525	7,400,671	1.8%	BIRMINGHAM/MONTGOMER	34,855,375	33,577,472	-3.7%
HARRISBURG/SCRANTON	40,226,068	40,909,324	1.7%	HOUSTON	57,320,717	55,111,933	-3.9%
INDIANAPOLIS	24,223,095	24,579,059	1.5%	ROANOKE	27,761,792	26,618,558	-4.1%
CINCINNATI/DAYTON	29,709,092	30,139,856	1.4%	SACRAMENTO	22,149,835	21,223,356	-4.2%
PHOENIX/TUCSON	56,315,326	57,040,967	1.3%	JACKSONVILLE	15,229,955	14,585,100	-4.2%
DENVER	32,293,936	32,542,579	0.8%	SOUTH CAROLINA	61,689,102	58,620,296	-5.0%
PEORIA/SPRINGFIELD	14,541,751	14,616,224	0.5%	PITTSBURGH	23,146,276	21,870,701	-5.5%
PORTLAND	22,408,760	22,394,302	-0.1%	DALLAS/FT. WORTH	75,881,666	71,661,259	-5.6%
BUFFALO/ROCHESTER	25,396,202	25,370,663	-0.1%	BALTIMORE/WASHINGTON	79,082,886	74,351,466	-6.0%
NEW ENGLAND	27,321,162	27,258,732	-0.2%	WICHITA	9,697,082	9,094,453	-6.2%
PHILADELPHIA	56,815,993	56,482,373	-0.6%	RICHMOND/NORFOLK	35,598,699	33,025,763	-7.2%
TOLEDO	16,996,798	16,880,354	-0.7%	MIAMI/FT. LAUDERDALE	37,280,214	34,580,397	-7.2%
LAS VEGAS	18,423,663	18,239,516	-1.0%	SEATTLE	20,210,123	18,707,013	-7.4%
TAMPA	27,373,930	27,052,158	-1.2%	NEW ORLEANS/MOBILE	29,066,347	26,640,258	-8.3%
ALBANY	11,714,883	11,567,692	-1.3%	CHICAGO	74,666,592	67,861,320	-9.1%
COLUMBUS	21,224,321	20,914,382	-1.5%	SAN FRANCISCO	22,909,639	19,814,531	-13.5%

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

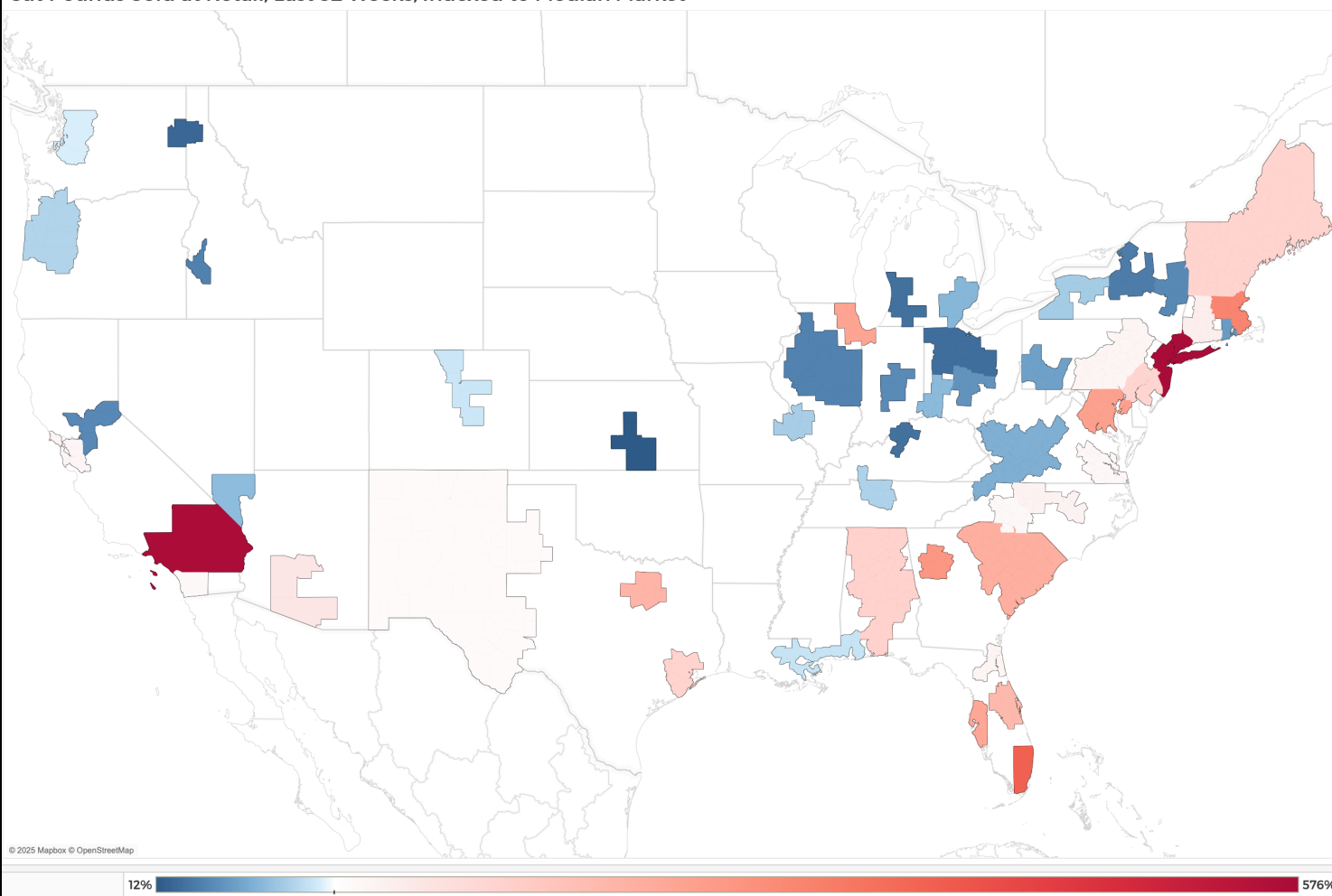


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Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	4,850,322	6,404,693	32.0%	BOSTON	4,690,535	4,583,327	-2.3%
LOUISVILLE	1,027,478	1,196,912	16.5%	BOISE	824,042	803,210	-2.5%
COLUMBUS	3,141,715	3,651,238	16.2%	CINCINNATI/DAYTON	3,553,828	3,461,187	-2.6%
BUFFALO/ROCHESTER	3,144,995	3,609,602	14.8%	CHARLOTTE	3,347,645	3,253,575	-2.8%
ROANOKE	2,456,677	2,780,291	13.2%	SOUTH CAROLINA	5,948,599	5,732,764	-3.6%
DETROIT	5,488,845	6,178,160	12.6%	ALBANY	1,200,282	1,155,398	-3.7%
TOLEDO	2,002,598	2,208,339	10.3%	NEW ORLEANS/MOBILE	1,984,614	1,898,385	-4.3%
GRAND RAPIDS	2,091,938	2,264,600	8.3%	RALEIGH/GREENSBORO	3,892,273	3,698,365	-5.0%
SPOKANE	638,725	685,636	7.3%	NEW YORK	10,367,789	9,828,259	-5.2%
PITTSBURGH	3,161,496	3,374,112	6.7%	SAN FRANCISCO	9,959,316	9,410,526	-5.5%
SACRAMENTO	4,586,417	4,713,251	2.8%	BALTIMORE/WASHINGTON	9,208,908	8,663,788	-5.9%
SEATTLE	5,429,544	5,538,742	2.0%	ATLANTA	5,253,161	4,924,502	-6.3%
ST. LOUIS	2,034,989	2,074,344	1.9%	HOUSTON	5,309,489	4,971,627	-6.4%
PORTLAND	4,673,254	4,763,609	1.9%	DALLAS/FT. WORTH	7,971,945	7,356,121	-7.7%
PROVIDENCE	673,800	685,637	1.8%	RICHMOND/NORFOLK	4,223,207	3,879,818	-8.1%
INDIANAPOLIS	2,348,804	2,379,297	1.3%	WEST TEX/NEW MEXICO	4,280,174	3,854,130	-10.0%
WICHITA	583,296	590,179	1.2%	TAMPA	4,821,390	4,331,656	-10.2%
NASHVILLE	2,328,811	2,354,099	1.1%	BIRMINGHAM/MONTGOMERY	3,454,550	3,093,380	-10.5%
PEORIA/SPRINGFIELD	1,206,298	1,219,051	1.1%	JACKSONVILLE	1,960,896	1,728,827	-11.8%
SYRACUSE	1,280,097	1,293,327	1.0%	ORLANDO	4,987,159	4,385,471	-12.1%
PHILADELPHIA	4,209,075	4,237,166	0.7%	HARTFORD/SPRINGFIELD	2,281,933	1,996,417	-12.5%
SAN DIEGO	5,620,196	5,597,055	-0.4%	MIAMI/FT. LAUDERDALE	7,784,009	6,793,639	-12.7%
DENVER	6,342,275	6,314,950	-0.4%	NEW ENGLAND	4,681,552	3,992,728	-14.7%
HARRISBURG/SCRANTON	2,721,843	2,706,423	-0.6%	LAS VEGAS	5,173,517	4,156,094	-19.7%
LOS ANGELES	28,715,168	28,426,153	-1.0%	PHOENIX/TUCSON	12,692,640	9,333,714	-26.5%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
ST. LOUIS	2,912,692	3,440,852	18.1%	CHARLOTTE	5,103,788	5,049,414	-1.1%
INDIANAPOLIS	1,574,644	1,786,124	13.4%	RALEIGH/GREENSBORO	5,608,797	5,497,935	-2.0%
BUFFALO/ROCHESTER	3,097,997	3,397,726	9.7%	ATLANTA	13,729,531	13,427,663	-2.2%
TOLEDO	997,231	1,081,674	8.5%	CHICAGO	13,007,869	12,289,862	-5.5%
ROANOKE	2,492,964	2,667,897	7.0%	GRAND RAPIDS	1,240,363	1,136,320	-8.4%
ALBANY	1,635,574	1,745,597	6.7%	HARTFORD/SPRINGFIELD	6,419,322	5,828,663	-9.2%
SYRACUSE	1,332,806	1,419,483	6.5%	NEW YORK	29,166,245	26,116,396	-10.5%
LOUISVILLE	1,095,191	1,160,966	6.0%	NEW ENGLAND	9,305,946	8,093,294	-13.0%
PEORIA/SPRINGFIELD	1,499,294	1,581,133	5.5%	PROVIDENCE	2,541,207	2,198,932	-13.5%
SAN FRANCISCO	5,022,113	5,275,017	5.0%	WEST TEX/NEW MEXICO	5,650,514	4,859,255	-14.0%
DETROIT	2,718,065	2,825,514	4.0%	LOS ANGELES	31,159,575	25,901,974	-16.9%
ORLANDO	10,071,524	10,439,148	3.7%	NEW ORLEANS/MOBILE	4,816,117	3,975,367	-17.5%
HARRISBURG/SCRANTON	5,196,745	5,354,186	3.0%	BOSTON	18,719,887	15,057,772	-19.6%
SACRAMENTO	1,696,209	1,743,095	2.8%	HOUSTON	10,279,714	8,169,597	-20.5%
NASHVILLE	3,498,872	3,543,406	1.3%	BALTIMORE/WASHINGTON	15,810,857	12,506,627	-20.9%
SOUTH CAROLINA	11,189,454	11,322,989	1.2%	BOISE	2,024,648	1,550,955	-23.4%
JACKSONVILLE	5,325,853	5,358,516	0.6%	PHILADELPHIA	10,563,302	8,006,737	-24.2%
COLUMBUS	1,994,998	2,004,962	0.5%	DENVER	5,494,978	4,047,275	-26.3%
BIRMINGHAM/MONTGOMERY	8,215,181	8,247,116	0.4%	DALLAS/FT. WORTH	14,907,705	10,853,325	-27.2%
WICHITA	554,314	555,364	0.2%	SAN DIEGO	7,257,190	5,032,491	-30.7%
TAMPA	11,973,000	11,963,501	-0.1%	PHOENIX/TUCSON	9,468,414	6,491,372	-31.4%
MIAMI/FT. LAUDERDALE	17,908,171	17,856,928	-0.3%	LAS VEGAS	4,532,539	2,986,542	-34.1%
RICHMOND/NORFOLK	5,145,357	5,110,062	-0.7%	SPOKANE	1,521,125	893,512	-41.3%
CINCINNATI/DAYTON	2,947,909	2,922,844	-0.9%	PORTLAND	6,147,933	3,602,904	-41.4%
PITTSBURGH	2,358,793	2,336,840	-0.9%	SEATTLE	7,755,753	4,216,020	-45.6%