

Retail Scan Data

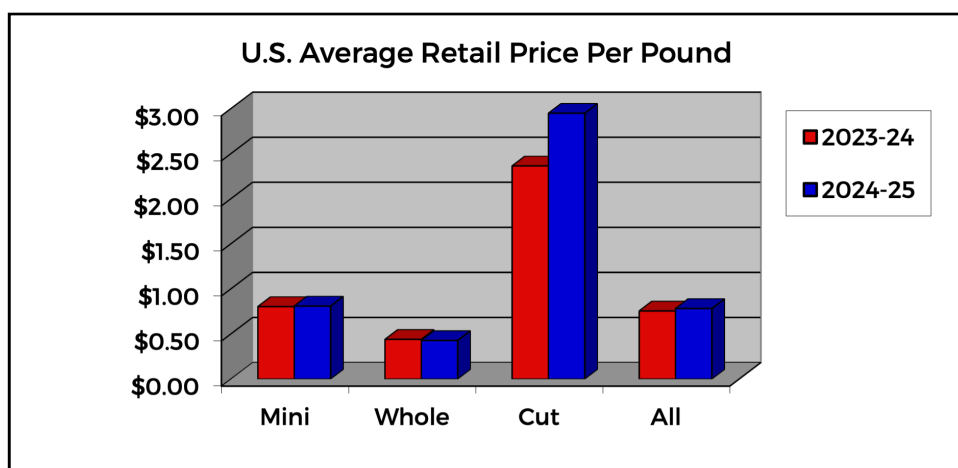
Compiled by the National Watermelon Promotion Board



Data current through
August 10, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	328,201,856	324,239,546	-1.2%	9.4%
Whole	2,728,802,632	2,696,288,307	-1.2%	78.0%
Cut	524,959,826	437,641,268	-16.6%	12.7%
Total	3,581,964,314	3,458,169,120	-3.5%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.80	\$0.81
Whole	\$0.44	\$0.43
Cut	\$2.36	\$2.95
All	\$0.76	\$0.78



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.14	\$0.89
California 2024-25	\$0.49	\$2.71	\$0.92
Great Lakes 2023-24	\$0.45	\$3.37	\$0.67
Great Lakes 2024-25	\$0.43	\$3.66	\$0.66
Midsouth 2023-24	\$0.41	\$2.84	\$0.74
Midsouth 2024-25	\$0.40	\$3.19	\$0.72
Northeast 2023-24	\$0.42	\$2.08	\$0.93
Northeast 2024-25	\$0.41	\$2.41	\$0.89
Plains 2023-24	\$0.42	\$2.74	\$0.86
Plains 2024-25	\$0.41	\$2.64	\$0.85
Southcentral 2023-24	\$0.44	\$1.75	\$0.78
Southcentral 2024-25	\$0.43	\$2.89	\$0.80
Southeast 2023-24	\$0.45	\$2.88	\$0.82
Southeast 2024-25	\$0.44	\$3.13	\$0.81
West 2023-24	\$0.45	\$1.93	\$0.76
West 2024-25	\$0.45	\$3.19	\$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 August 10, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

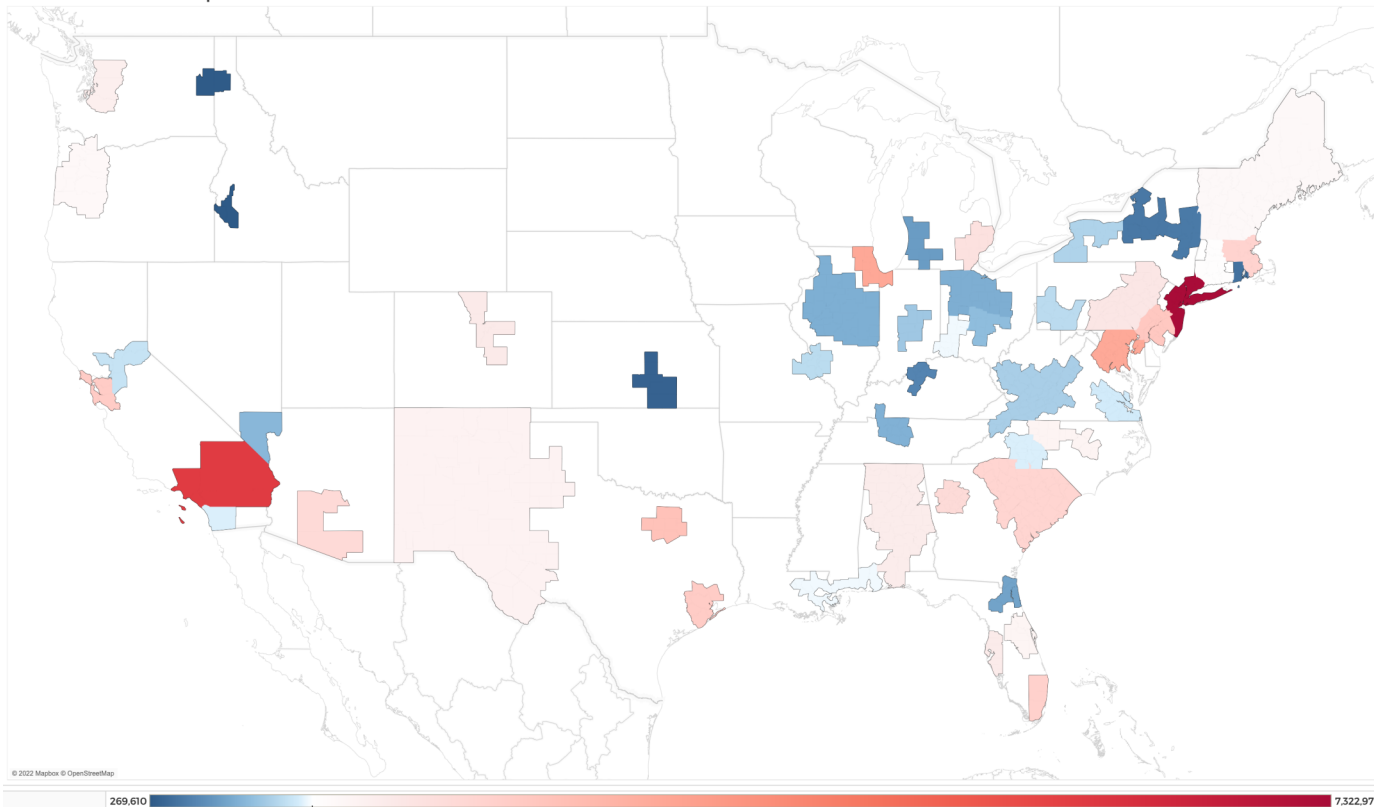
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Scanner Data Regions



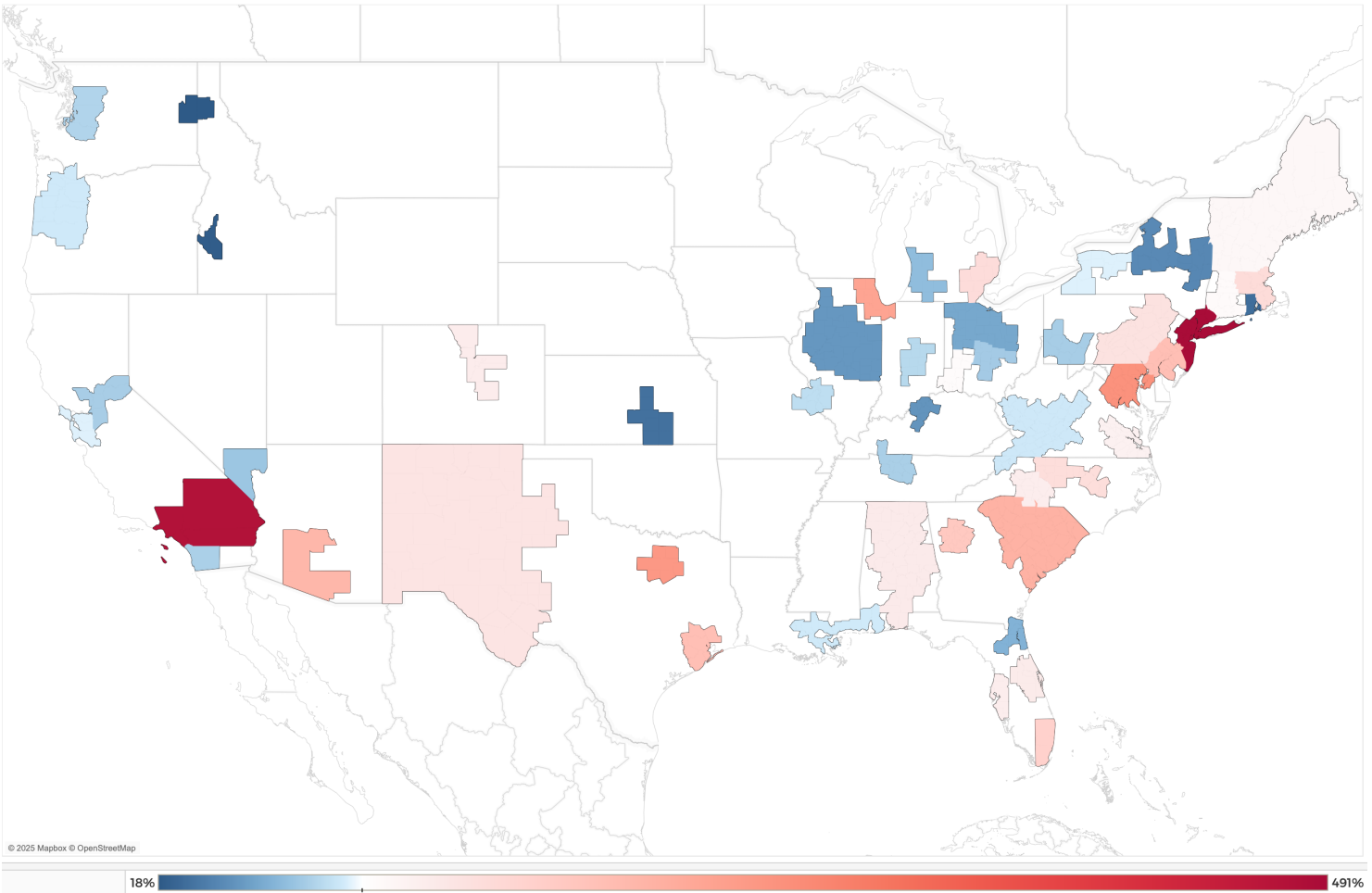
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	235,382,559	56,436,628	61,568,636	353,387,823
California 2024-25	224,340,430	44,555,549	60,163,994	329,059,973
Percent Growth	-4.7%	-21.1%	-2.3%	-6.9%
2024-25 % of Total	68.2%	13.5%	18.3%	100.0%
Great Lakes 2023-24	415,987,388	35,228,599	43,053,486	494,269,473
Great Lakes 2024-25	411,680,424	35,144,329	47,206,369	494,031,122
Percent Growth	-1.0%	-0.2%	9.6%	0.0%
2024-25 % of Total	83.3%	7.1%	9.6%	100.0%
Midsouth 2023-24	421,698,403	56,506,892	40,392,784	518,598,079
Midsouth 2024-25	414,728,484	53,247,405	40,878,966	508,854,856
Percent Growth	-1.7%	-5.8%	1.2%	-1.9%
2024-25 % of Total	81.5%	10.5%	8.0%	100.0%
Northeast 2023-24	453,022,658	97,543,856	42,003,222	592,569,736
Northeast 2024-25	446,417,524	83,663,903	41,579,687	571,661,114
Percent Growth	-1.5%	-14.2%	-1.0%	-3.5%
2024-25 % of Total	78.1%	14.6%	7.3%	100.0%
Plains 2023-24	213,156,988	18,675,121	11,913,504	243,745,613
Plains 2024-25	215,745,700	19,471,984	13,187,702	248,405,386
Percent Growth	1.2%	4.3%	10.7%	1.9%
2024-25 % of Total	86.9%	7.8%	5.3%	100.0%
Southcentral 2023-24	336,953,992	93,807,119	27,653,518	458,414,629
Southcentral 2024-25	331,863,329	58,744,007	27,048,641	417,655,977
Percent Growth	-1.5%	-37.4%	-2.2%	-8.9%
2024-25 % of Total	79.5%	14.1%	6.5%	100.0%
Southeast 2023-24	365,038,393	106,378,347	46,662,523	518,079,263
Southeast 2024-25	354,261,577	105,321,846	43,917,286	503,500,709
Percent Growth	-3.0%	-1.0%	-5.9%	-2.8%
2024-25 % of Total	70.4%	20.9%	8.7%	100.0%
West 2023-24	287,562,250	60,383,264	54,954,184	402,899,698
West 2024-25	297,250,838	37,482,246	50,256,899	384,999,983
Percent Growth	3.4%	-37.9%	-8.5%	-4.4%
2024-25 % of Total	77.2%	9.7%	13.1%	100.0%

Number of Households per Market



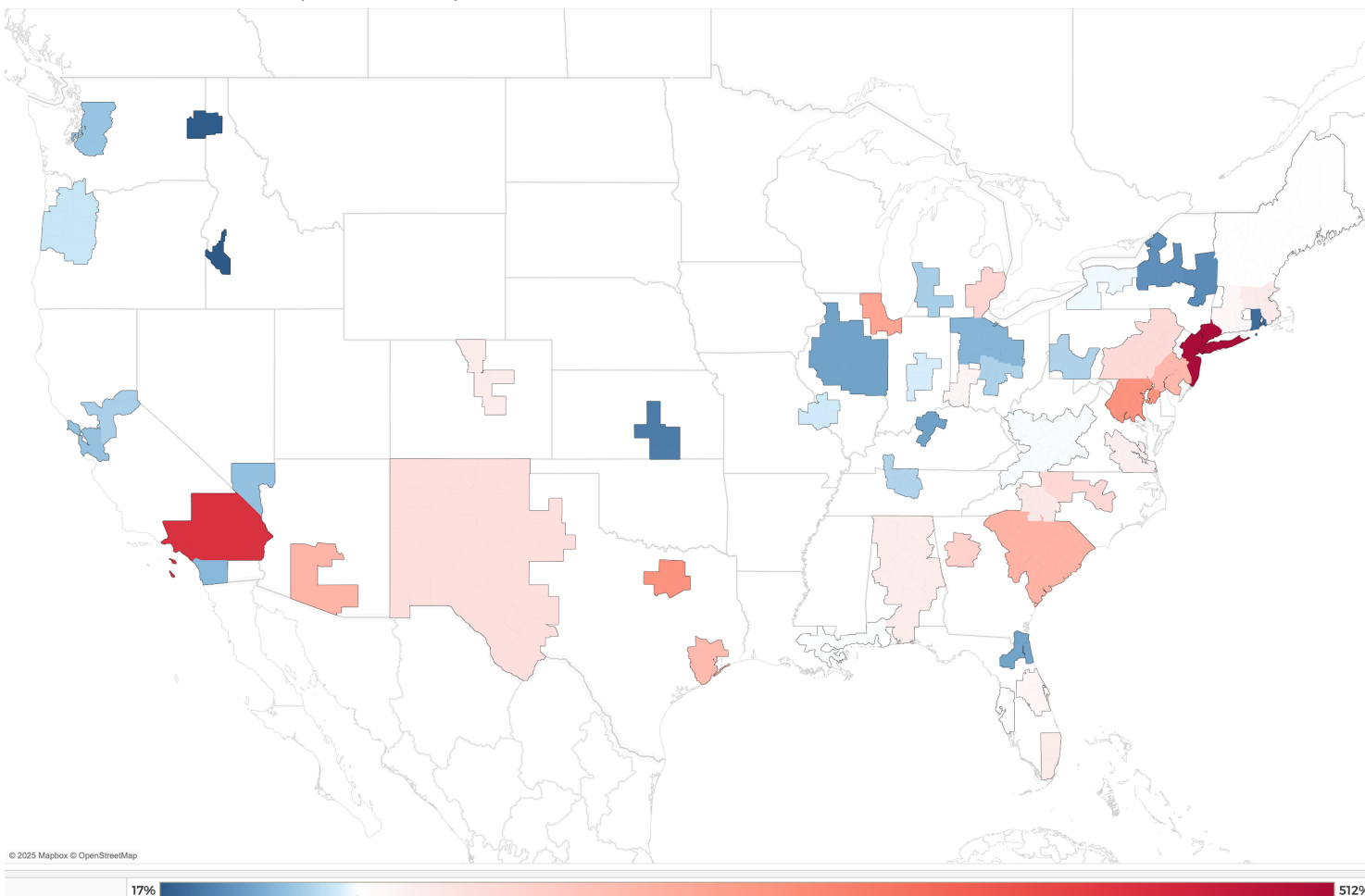
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814	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



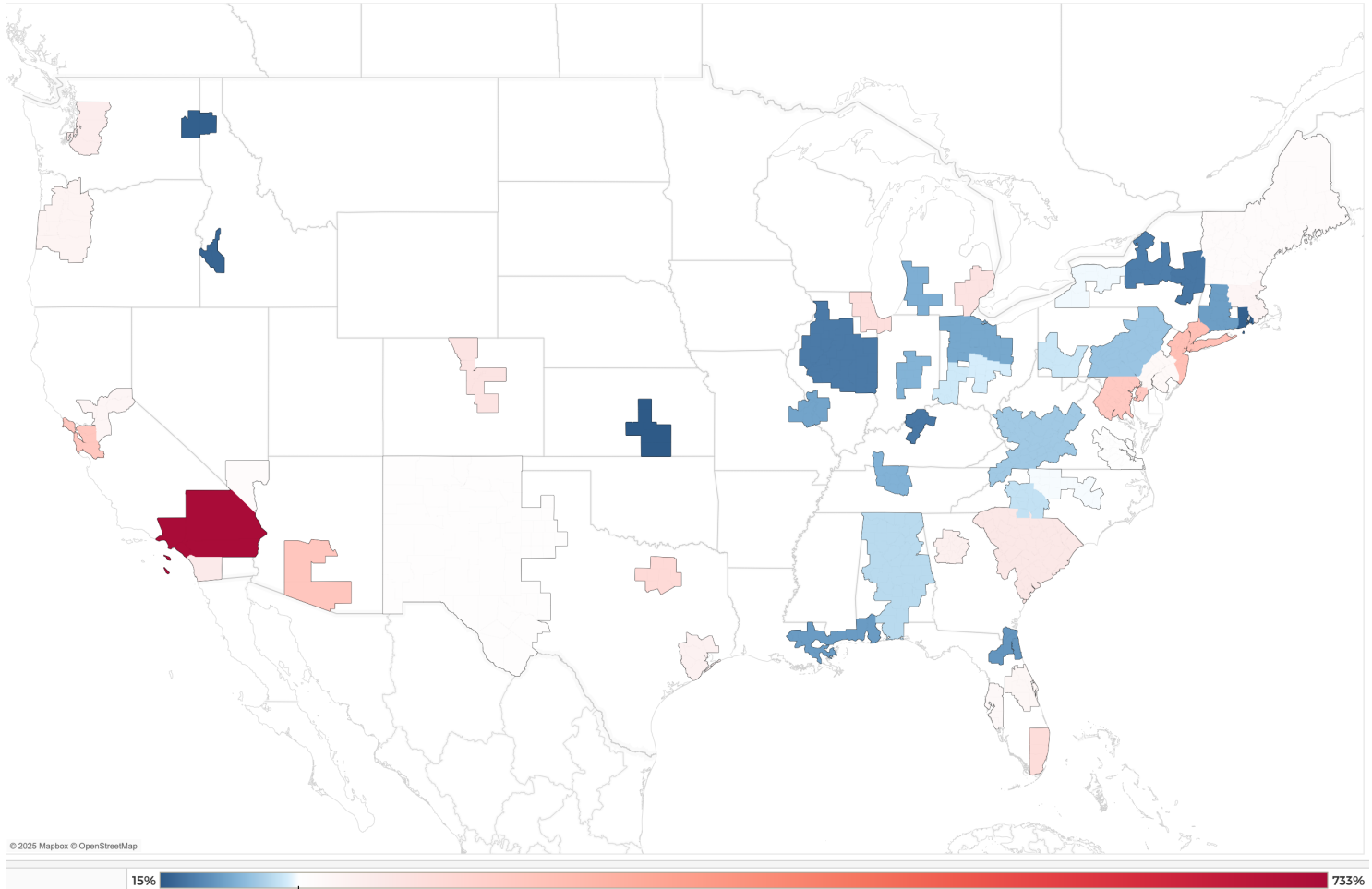
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
GRAND RAPIDS	21,821,640	24,093,226	10.4%	SACRAMENTO	28,233,694	27,253,357	-3.5%
DETROIT	49,765,269	52,812,845	6.1%	NEW YORK	178,713,237	172,360,702	-3.6%
LOUISVILLE	16,155,009	16,961,184	5.0%	PORTLAND	33,198,018	32,012,832	-3.6%
BUFFALO/ROCHESTER	31,917,618	33,180,937	4.0%	ATLANTA	66,451,087	64,007,654	-3.7%
INDIANAPOLIS	28,251,585	29,078,219	2.9%	PHILADELPHIA	72,064,015	69,220,103	-3.9%
HARRISBURG/SCRANTON	48,374,504	49,630,324	2.6%	BIRMINGHAM/MONTGOMERY	47,048,115	45,126,489	-4.1%
WEST TEX/NEW MEXICO	47,597,438	48,479,995	1.9%	HARTFORD/SPRINGFIELD	38,759,093	37,159,078	-4.1%
RALEIGH/GREENSBORO	51,546,831	52,132,057	1.1%	SPOKANE	6,559,908	6,235,733	-4.9%
CINCINNATI/DAYTON	36,697,912	37,055,113	1.0%	RICHMOND/NORFOLK	44,191,003	41,824,283	-5.4%
TOLEDO	20,144,404	20,340,358	1.0%	LOS ANGELES	177,294,677	166,964,244	-5.8%
CHARLOTTE	43,357,229	43,653,659	0.7%	PHOENIX/TUCSON	79,279,656	73,872,331	-6.8%
ORLANDO	44,787,205	44,931,125	0.3%	PITTSBURGH	29,129,803	27,127,126	-6.9%
SYRACUSE	14,949,426	14,936,637	-0.1%	MIAMI/FT. LAUDERDALE	64,062,766	59,264,293	-7.5%
PEORIA/SPRINGFIELD	17,534,837	17,456,074	-0.4%	NEW ENGLAND	42,076,939	38,850,322	-7.7%
ALBANY	14,658,352	14,558,462	-0.7%	DALLAS/FT. WORTH	98,776,543	90,864,522	-8.0%
COLUMBUS	26,939,741	26,630,306	-1.1%	PROVIDENCE	10,859,269	9,963,492	-8.2%
ST. LOUIS	30,347,356	29,982,485	-1.2%	BOISE	7,357,613	6,748,714	-8.3%
TAMPA	44,403,850	43,771,428	-1.4%	BALTIMORE/WASHINGTON	104,443,770	94,631,635	-9.4%
NASHVILLE	27,840,792	27,429,058	-1.5%	LAS VEGAS	28,383,444	25,696,752	-9.5%
DENVER	44,939,381	44,152,564	-1.8%	BOSTON	58,939,310	53,224,687	-9.7%
WICHITA	10,733,121	10,513,024	-2.1%	NEW ORLEANS/MOBILE	35,811,187	32,182,657	-10.1%
SOUTH CAROLINA	78,158,176	76,551,098	-2.1%	CHICAGO	94,380,917	84,224,204	-10.8%
ROANOKE	32,642,781	31,917,079	-2.2%	SAN FRANCISCO	37,350,597	33,218,029	-11.1%
JACKSONVILLE	22,551,326	22,011,646	-2.4%	SAN DIEGO	31,229,574	27,599,997	-11.6%
HOUSTON	71,325,289	69,329,591	-2.8%	SEATTLE	33,659,340	28,372,287	-15.7%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
GRAND RAPIDS	18,446,790	20,667,295	12.0%	NASHVILLE	21,905,680	21,492,721	-1.9%
SPOKANE	4,342,506	4,742,759	9.2%	LOS ANGELES	116,449,238	114,228,025	-1.9%
PORTLAND	22,268,403	23,677,975	6.3%	HARTFORD/SPRINGFIELD	30,014,958	29,436,429	-1.9%
DETROIT	41,196,628	43,748,568	6.2%	JACKSONVILLE	15,171,132	14,852,307	-2.1%
WEST TEX/NEW MEXICO	37,854,432	39,743,506	5.0%	WICHITA	9,579,474	9,375,798	-2.1%
LOUISVILLE	13,967,697	14,577,977	4.4%	SOUTH CAROLINA	60,896,272	59,445,589	-2.4%
DENVER	32,683,282	34,087,204	4.3%	BOSTON	35,218,766	34,347,927	-2.5%
BOISE	4,402,395	4,555,383	3.5%	DALLAS/FT. WORTH	75,605,289	73,640,988	-2.6%
HARRISBURG/SCRANTON	40,300,482	41,548,271	3.1%	COLUMBUS	21,627,427	21,047,371	-2.7%
INDIANAPOLIS	24,254,343	24,870,769	2.5%	ATLANTA	47,230,040	45,687,726	-3.3%
HOUSTON	55,453,478	56,520,825	1.9%	SAN DIEGO	18,089,471	17,441,440	-3.6%
BUFFALO/ROCHESTER	25,529,453	26,008,990	1.9%	SEATTLE	20,135,890	19,259,654	-4.4%
RALEIGH/GREENSBORO	42,114,399	42,853,202	1.8%	BIRMINGHAM/MONTGOMERY	35,238,986	33,680,503	-4.4%
ORLANDO	29,481,530	29,914,898	1.5%	ROANOKE	27,602,579	26,352,192	-4.5%
CINCINNATI/DAYTON	30,247,492	30,623,345	1.2%	NEW ENGLAND	28,184,407	26,899,316	-4.6%
CHARLOTTE	34,934,169	35,268,869	1.0%	ST. LOUIS	25,582,684	24,395,486	-4.6%
TAMPA	27,277,267	27,392,037	0.4%	SACRAMENTO	21,972,752	20,851,690	-5.1%
PHOENIX/TUCSON	58,205,736	58,442,762	0.4%	PROVIDENCE	7,596,889	7,143,363	-6.0%
PHILADELPHIA	57,123,241	57,268,295	0.3%	RICHMOND/NORFOLK	34,908,502	32,767,307	-6.1%
TOLEDO	17,032,365	17,075,456	0.3%	BALTIMORE/WASHINGTON	79,235,460	73,902,651	-6.7%
LAS VEGAS	18,870,902	18,761,985	-0.6%	MIAMI/FT. LAUDERDALE	37,900,942	34,652,705	-8.6%
SYRACUSE	12,306,836	12,166,343	-1.1%	NEW ORLEANS/MOBILE	28,978,109	26,469,994	-8.7%
PEORIA/SPRINGFIELD	14,837,493	14,650,006	-1.3%	PITTSBURGH	23,549,837	21,352,751	-9.3%
NEW YORK	139,096,548	136,666,155	-1.7%	CHICAGO	76,004,253	65,731,252	-13.5%
ALBANY	11,829,317	11,611,351	-1.8%	SAN FRANCISCO	22,716,712	18,900,514	-16.8%

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



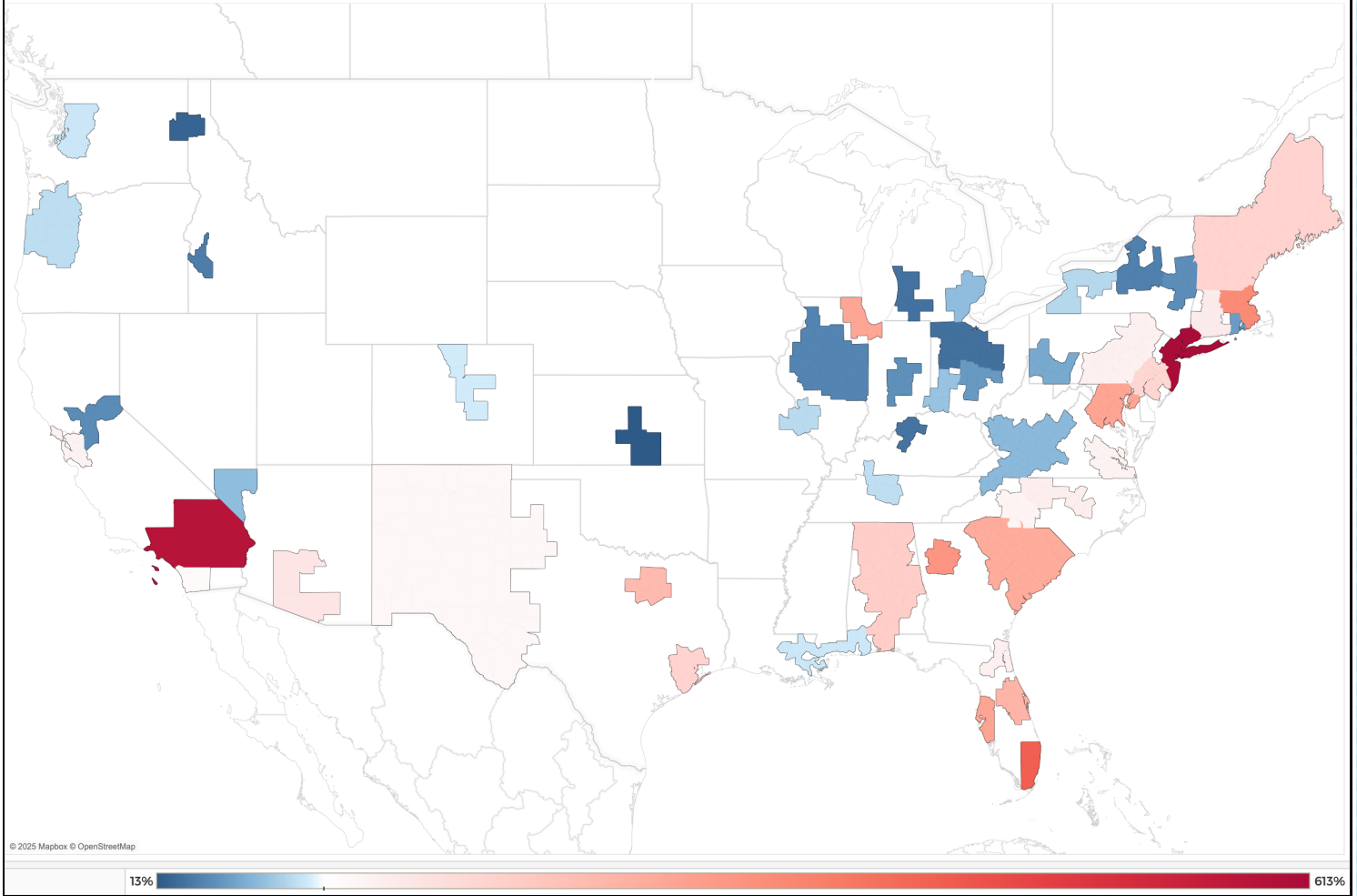
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15%

733%

Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	5,287,787	6,698,416	26.7%	ATLANTA	5,215,193	5,110,698	-2.0%
BUFFALO/ROCHESTER	3,237,339	3,730,761	15.2%	RALEIGH/GREENSBORO	3,840,430	3,761,089	-2.1%
ST. LOUIS	1,818,755	2,089,607	14.9%	HARRISBURG/SCRANTON	2,788,470	2,730,127	-2.1%
LOUISVILLE	1,057,422	1,202,590	13.7%	SAN DIEGO	5,733,243	5,590,048	-2.5%
ROANOKE	2,527,096	2,831,140	12.0%	SOUTH CAROLINA	5,948,431	5,790,587	-2.7%
PROVIDENCE	671,492	720,677	7.3%	WICHITA	596,267	578,088	-3.0%
COLUMBUS	3,311,806	3,553,727	7.3%	LOS ANGELES	28,940,509	28,029,985	-3.1%
DETROIT	5,849,949	6,239,305	6.7%	BALTIMORE/WASHINGTON	9,150,962	8,842,349	-3.4%
GRAND RAPIDS	2,149,785	2,290,536	6.5%	NEW ENGLAND	4,320,303	4,109,029	-4.9%
PITTSBURGH	3,208,361	3,405,439	6.1%	SAN FRANCISCO	9,544,766	9,076,904	-4.9%
SPOKANE	659,103	691,929	5.0%	WEST TEX/NEW MEXICO	4,137,539	3,926,256	-5.1%
BOISE	768,779	806,254	4.9%	NEW YORK	10,397,554	9,806,460	-5.7%
PEORIA/SPRINGFIELD	1,195,575	1,248,158	4.4%	SEATTLE	5,662,506	5,334,694	-5.8%
TOLEDO	2,106,895	2,165,245	2.8%	RICHMOND/NORFOLK	4,182,372	3,892,055	-6.9%
PHILADELPHIA	4,252,258	4,344,002	2.2%	JACKSONVILLE	1,944,853	1,800,833	-7.4%
SYRACUSE	1,293,019	1,318,714	2.0%	DENVER	6,677,201	6,182,426	-7.4%
SACRAMENTO	4,581,669	4,667,472	1.9%	BIRMINGHAM/MONTGOMERY	3,431,894	3,173,153	-7.5%
ALBANY	1,163,495	1,173,915	0.9%	TAMPA	4,835,735	4,416,118	-8.7%
BOSTON	4,638,420	4,664,631	0.6%	ORLANDO	4,966,660	4,510,950	-9.2%
NASHVILLE	2,347,453	2,354,991	0.3%	HOUSTON	5,500,196	4,979,865	-9.5%
INDIANAPOLIS	2,377,561	2,378,078	0.0%	DALLAS/FT. WORTH	7,943,717	7,166,168	-9.8%
NEW ORLEANS/MOBILE	1,926,133	1,919,076	-0.4%	MIAMI/FT. LAUDERDALE	7,816,268	6,892,557	-11.8%
CHARLOTTE	3,327,969	3,313,024	-0.4%	HARTFORD/SPRINGFIELD	2,319,857	1,976,367	-14.8%
CINCINNATI/DAYTON	3,503,570	3,468,971	-1.0%	LAS VEGAS	4,964,765	4,119,037	-17.0%
PORTLAND	4,852,662	4,783,081	-1.4%	PHOENIX/TUCSON	11,685,631	9,189,669	-21.4%

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	2,945,917	3,497,392	18.7%	TAMPA	12,290,849	11,963,273	-2.7%
INDIANAPOLIS	1,619,681	1,829,372	12.9%	MIAMI/FT. LAUDERDALE	18,345,556	17,719,031	-3.4%
TOLEDO	1,005,144	1,099,658	9.4%	ATLANTA	14,005,854	13,209,230	-5.7%
BUFFALO/ROCHESTER	3,150,826	3,441,185	9.2%	GRAND RAPIDS	1,225,065	1,135,395	-7.3%
ROANOKE	2,513,106	2,733,748	8.8%	CHICAGO	13,088,878	11,794,536	-9.9%
SYRACUSE	1,349,570	1,451,580	7.6%	HARTFORD/SPRINGFIELD	6,424,278	5,746,281	-10.6%
ALBANY	1,665,540	1,773,196	6.5%	NEW YORK	29,219,134	25,888,088	-11.4%
LOUISVILLE	1,129,890	1,180,617	4.5%	WEST TEX/NEW MEXICO	5,605,467	4,810,233	-14.2%
DETROIT	2,718,692	2,824,971	3.9%	NEW ENGLAND	9,572,229	7,841,977	-18.1%
PEORIA/SPRINGFIELD	1,501,768	1,557,909	3.7%	PROVIDENCE	2,590,888	2,099,453	-19.0%
SACRAMENTO	1,679,273	1,734,195	3.3%	LOS ANGELES	31,904,930	24,706,234	-22.6%
SAN FRANCISCO	5,089,119	5,240,611	3.0%	NEW ORLEANS/MOBILE	4,906,946	3,793,588	-22.7%
ORLANDO	10,339,015	10,505,277	1.6%	HOUSTON	10,371,615	7,828,901	-24.5%
COLUMBUS	2,000,508	2,029,207	1.4%	BOSTON	19,082,124	14,212,128	-25.5%
RICHMOND/NORFOLK	5,100,129	5,164,920	1.3%	BALTIMORE/WASHINGTON	16,057,347	11,886,635	-26.0%
HARRISBURG/SCRANTON	5,285,552	5,351,926	1.3%	PHILADELPHIA	10,688,515	7,607,807	-28.8%
CINCINNATI/DAYTON	2,946,850	2,962,796	0.5%	DENVER	5,578,898	3,882,934	-30.4%
WICHITA	557,380	559,139	0.3%	PHOENIX/TUCSON	9,388,289	6,239,900	-33.5%
SOUTH CAROLINA	11,313,473	11,314,922	0.0%	DALLAS/FT. WORTH	15,227,537	10,057,366	-34.0%
PITTSBURGH	2,371,604	2,368,935	-0.1%	BOISE	2,186,439	1,387,077	-36.6%
NASHVILLE	3,587,659	3,581,346	-0.2%	LAS VEGAS	4,547,778	2,815,730	-38.1%
CHARLOTTE	5,095,091	5,071,766	-0.5%	SAN DIEGO	7,406,860	4,568,509	-38.3%
BIRMINGHAM/MONTGOMERY	8,377,236	8,272,832	-1.2%	PORTLAND	6,076,953	3,551,776	-41.6%
RALEIGH/GREENSBORO	5,592,002	5,517,766	-1.3%	SPOKANE	1,558,298	801,044	-48.6%
JACKSONVILLE	5,435,341	5,358,505	-1.4%	SEATTLE	7,860,944	3,777,939	-51.9%