



Retail Scan Data

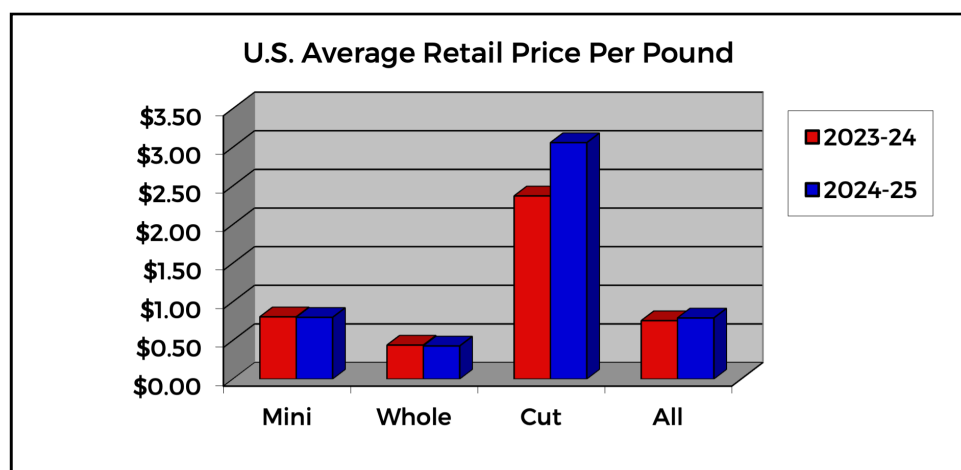
Compiled by the National Watermelon Promotion Board



Data current through
September 7, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	328,204,009	329,723,363	0.5%	9.6%
Whole	2,718,304,287	2,685,048,167	-1.2%	78.0%
Cut	521,302,034	428,117,119	-17.6%	12.4%
Total	3,567,810,330	3,442,888,649	-3.5%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.81	\$0.80
Whole	\$0.44	\$0.43
Cut	\$2.37	\$3.06
All	\$0.76	\$0.79



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.15	\$0.91
California 2024-25	\$0.49	\$2.85	\$0.88
Great Lakes 2023-24	\$0.45	\$3.38	\$0.66
Great Lakes 2024-25	\$0.44	\$3.70	\$0.65
Midsouth 2023-24	\$0.41	\$2.86	\$0.73
Midsouth 2024-25	\$0.41	\$3.25	\$0.72
Northeast 2023-24	\$0.42	\$2.09	\$0.92
Northeast 2024-25	\$0.41	\$2.45	\$0.87
Plains 2023-24	\$0.42	\$2.74	\$0.86
Plains 2024-25	\$0.41	\$2.62	\$0.85
Southcentral 2023-24	\$0.45	\$1.75	\$0.78
Southcentral 2024-25	\$0.43	\$3.19	\$0.80
Southeast 2023-24	\$0.46	\$2.88	\$0.82
Southeast 2024-25	\$0.44	\$3.21	\$0.81
West 2023-24	\$0.45	\$1.95	\$0.76
West 2024-25	\$0.44	\$3.41	\$0.81

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 September 7, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

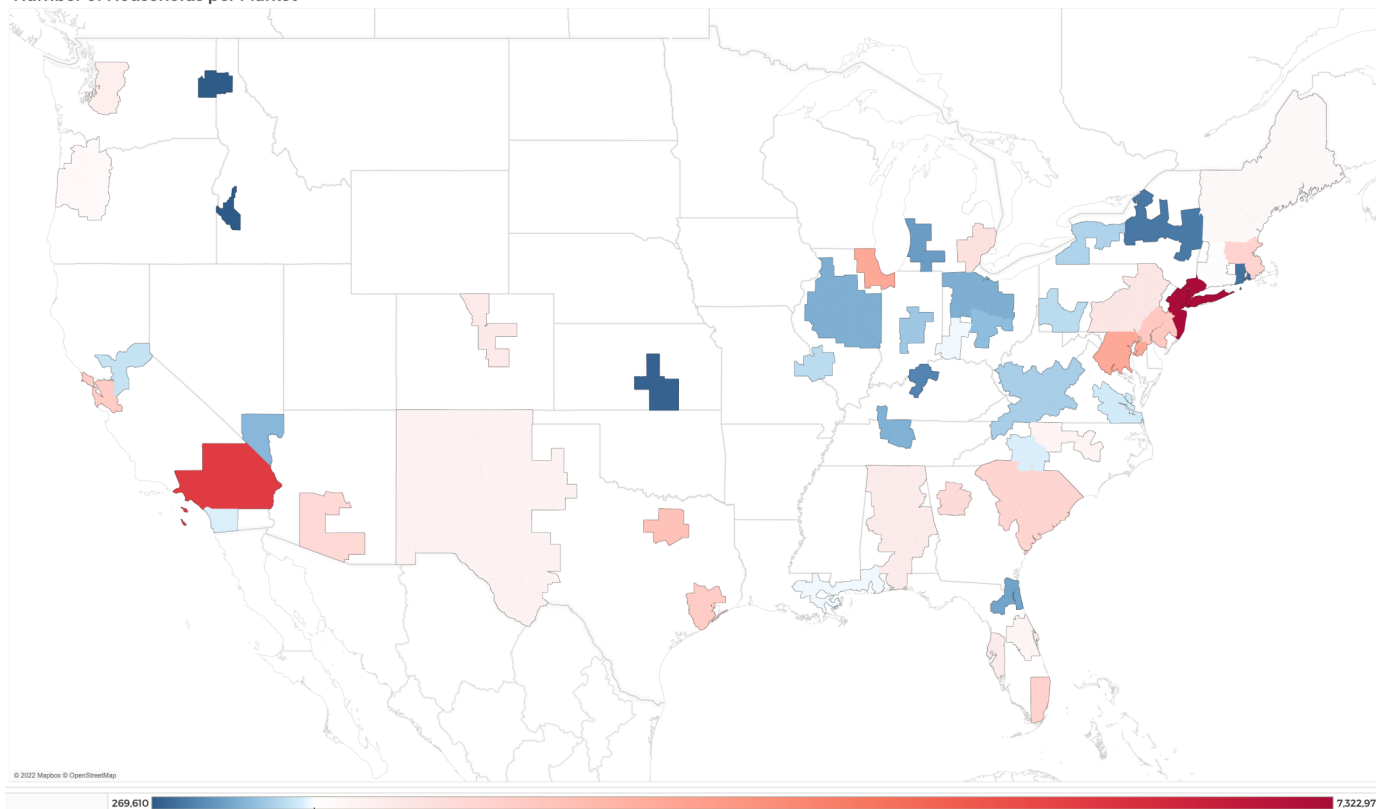
Jason Hanselman • Phone: (407) 925-5285 • Email: jasonh116@gmail.com

Scanner Data Regions



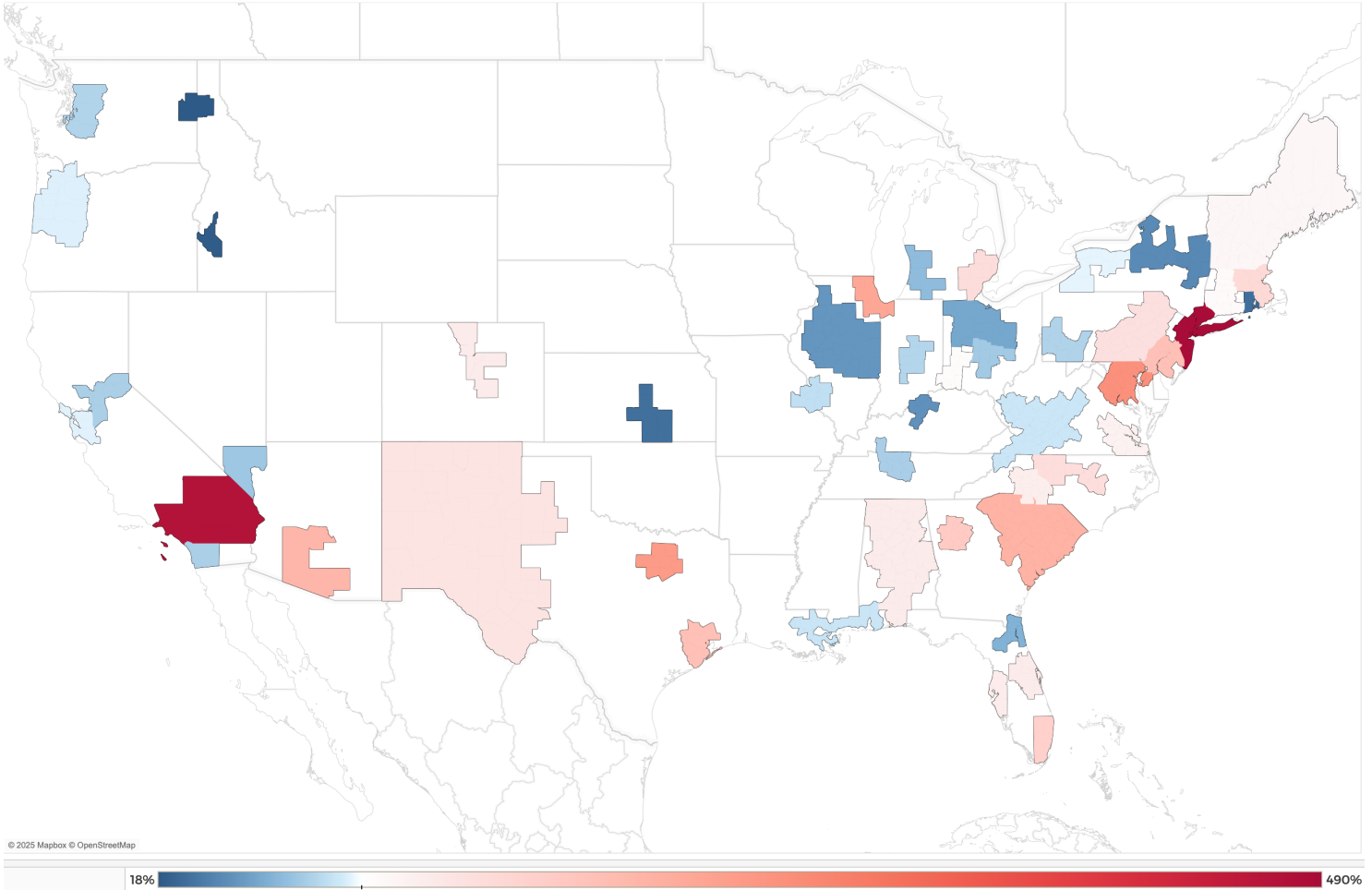
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	237,414,874	56,550,247	60,487,993	354,453,115
California 2024-25	222,772,842	42,134,340	63,221,490	328,128,673
Percent Growth	-6.2%	-25.5%	4.5%	-7.4%
2024-25 % of Total	67.9%	12.8%	19.3%	100.0%
Great Lakes 2023-24	414,568,392	35,007,265	44,328,484	493,904,142
Great Lakes 2024-25	407,650,136	34,992,233	47,891,599	490,533,967
Percent Growth	-1.7%	0.0%	8.0%	-0.7%
2024-25 % of Total	83.1%	7.1%	9.8%	100.0%
Midsouth 2023-24	417,414,987	55,969,882	40,714,586	514,099,455
Midsouth 2024-25	412,014,502	53,133,239	41,172,528	506,320,268
Percent Growth	-1.3%	-5.1%	1.1%	-1.5%
2024-25 % of Total	81.4%	10.5%	8.1%	100.0%
Northeast 2023-24	454,193,932	96,759,216	42,028,483	592,981,631
Northeast 2024-25	448,110,919	83,123,703	42,677,147	573,911,770
Percent Growth	-1.3%	-14.1%	1.5%	-3.2%
2024-25 % of Total	78.1%	14.5%	7.4%	100.0%
Plains 2023-24	213,654,610	18,463,792	11,717,922	243,836,323
Plains 2024-25	213,313,045	19,733,442	13,119,492	246,165,979
Percent Growth	-0.2%	6.9%	12.0%	1.0%
2024-25 % of Total	86.7%	8.0%	5.3%	100.0%
Southcentral 2023-24	330,657,762	93,442,229	27,576,391	451,676,381
Southcentral 2024-25	328,630,528	53,242,449	26,734,123	408,607,100
Percent Growth	-0.6%	-43.0%	-3.1%	-9.5%
2024-25 % of Total	80.4%	13.0%	6.5%	100.0%
Southeast 2023-24	363,762,230	105,723,246	45,636,588	515,122,064
Southeast 2024-25	350,199,810	106,106,497	44,591,024	500,897,331
Percent Growth	-3.7%	0.4%	-2.3%	-2.8%
2024-25 % of Total	69.9%	21.2%	8.9%	100.0%
West 2023-24	286,637,500	59,386,158	55,713,561	401,737,219
West 2024-25	302,356,385	35,651,215	50,315,959	388,323,559
Percent Growth	5.5%	-40.0%	-9.7%	-3.3%
2024-25 % of Total	77.9%	9.2%	13.0%	100.0%

Number of Households per Market



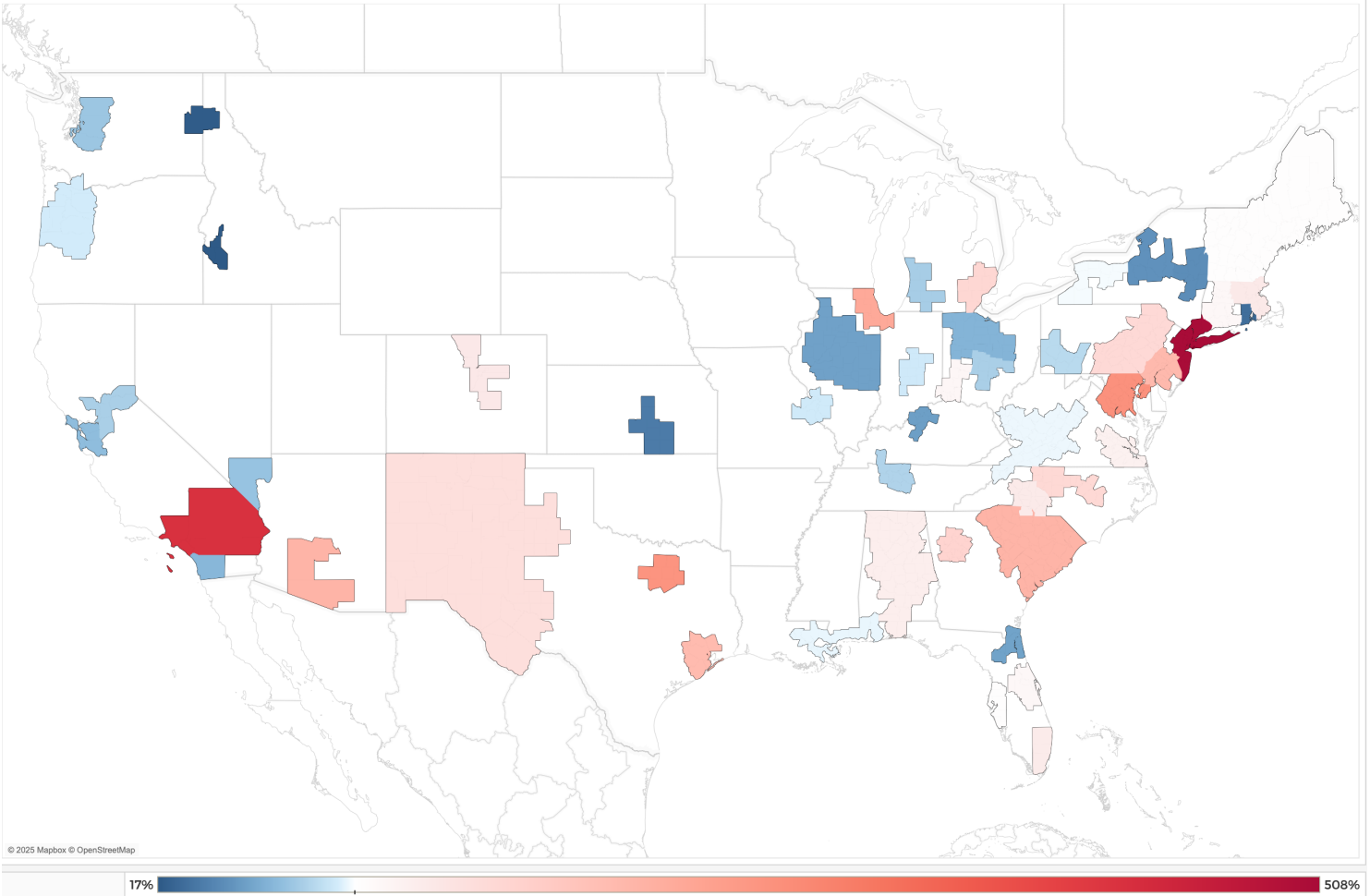
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



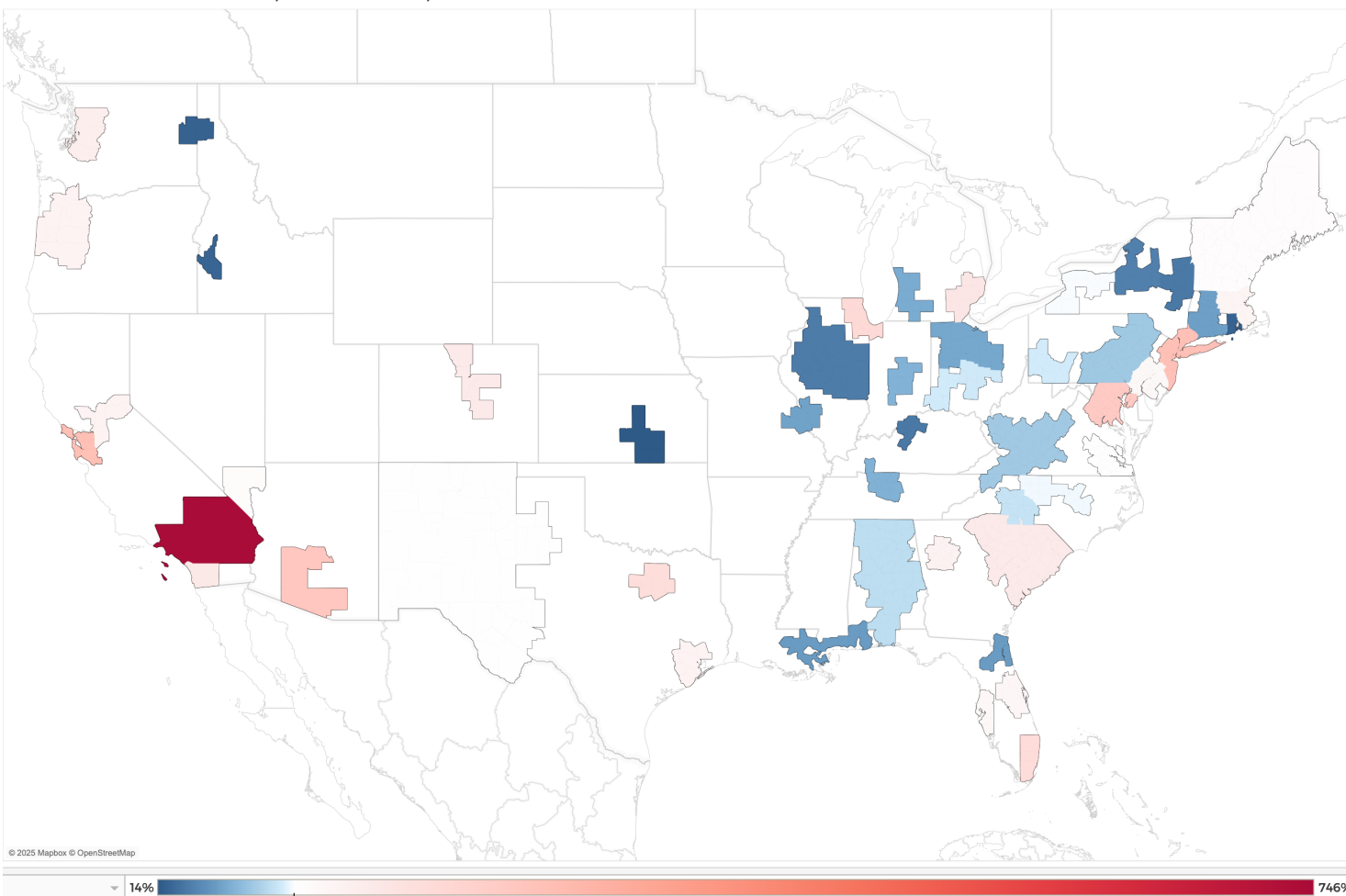
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,811,853	33,589,386	5.6%	HOUSTON	69,884,417	68,439,118	-2.1%
GRAND RAPIDS	22,702,689	23,889,002	5.2%	SACRAMENTO	28,106,170	27,461,840	-2.3%
HARRISBURG/SCRANTON	48,066,059	50,407,821	4.9%	ROANOKE	32,436,729	31,540,726	-2.8%
DETROIT	50,376,582	52,334,978	3.9%	HARTFORD/SPRINGFIELD	38,462,547	37,388,144	-2.8%
SYRACUSE	14,833,899	15,270,791	2.9%	BIRMINGHAM/MONTGOMERY	46,788,686	44,900,544	-4.0%
INDIANAPOLIS	28,006,480	28,624,688	2.2%	NEW YORK	179,719,213	172,010,105	-4.3%
ALBANY	14,488,181	14,805,666	2.2%	RICHMOND/NORFOLK	43,324,176	41,393,786	-4.5%
WEST TEX/NEW MEXICO	47,621,679	48,506,592	1.9%	PHILADELPHIA	71,954,207	68,572,403	-4.7%
DENVER	44,258,277	45,044,556	1.8%	ATLANTA	66,413,236	62,663,569	-5.6%
CHARLOTTE	42,846,931	43,559,851	1.7%	SPOKANE	6,616,598	6,219,176	-6.0%
RALEIGH/GREENSBORO	51,014,635	51,841,850	1.6%	NEW ENGLAND	41,756,565	39,159,874	-6.2%
TOLEDO	19,925,743	20,233,548	1.5%	PROVIDENCE	10,846,313	10,155,959	-6.4%
ORLANDO	44,493,494	44,992,234	1.1%	MIAMI/FT. LAUDERDALE	63,735,401	59,500,919	-6.6%
CINCINNATI/DAYTON	36,272,463	36,642,899	1.0%	PHOENIX/TUCSON	79,587,682	74,076,982	-6.9%
LOUISVILLE	16,450,102	16,514,125	0.4%	LOS ANGELES	178,990,623	165,738,870	-7.4%
PORTLAND	32,971,813	33,087,762	0.4%	BALTIMORE/WASHINGTON	102,195,120	94,620,893	-7.4%
NASHVILLE	27,518,077	27,389,338	-0.5%	DALLAS/FT. WORTH	96,988,291	89,418,472	-7.8%
WICHITA	10,427,142	10,331,427	-0.9%	BOSTON	58,801,955	53,936,426	-8.3%
JACKSONVILLE	22,319,609	22,050,205	-1.2%	LAS VEGAS	28,298,545	25,834,677	-8.7%
COLUMBUS	26,807,688	26,449,810	-1.3%	SAN FRANCISCO	37,003,675	33,397,098	-9.7%
PEORIA/SPRINGFIELD	17,547,890	17,308,651	-1.4%	BOISE	7,395,243	6,581,599	-11.0%
PITTSBURGH	28,597,151	28,205,577	-1.4%	NEW ORLEANS/MOBILE	35,267,380	31,303,090	-11.2%
TAMPA	44,350,954	43,741,774	-1.4%	CHICAGO	93,694,963	82,401,721	-12.1%
SOUTH CAROLINA	77,092,997	76,009,067	-1.4%	SAN DIEGO	31,293,117	27,408,065	-12.4%
ST. LOUIS	30,697,660	30,134,240	-1.8%	SEATTLE	33,077,937	28,357,443	-14.3%

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



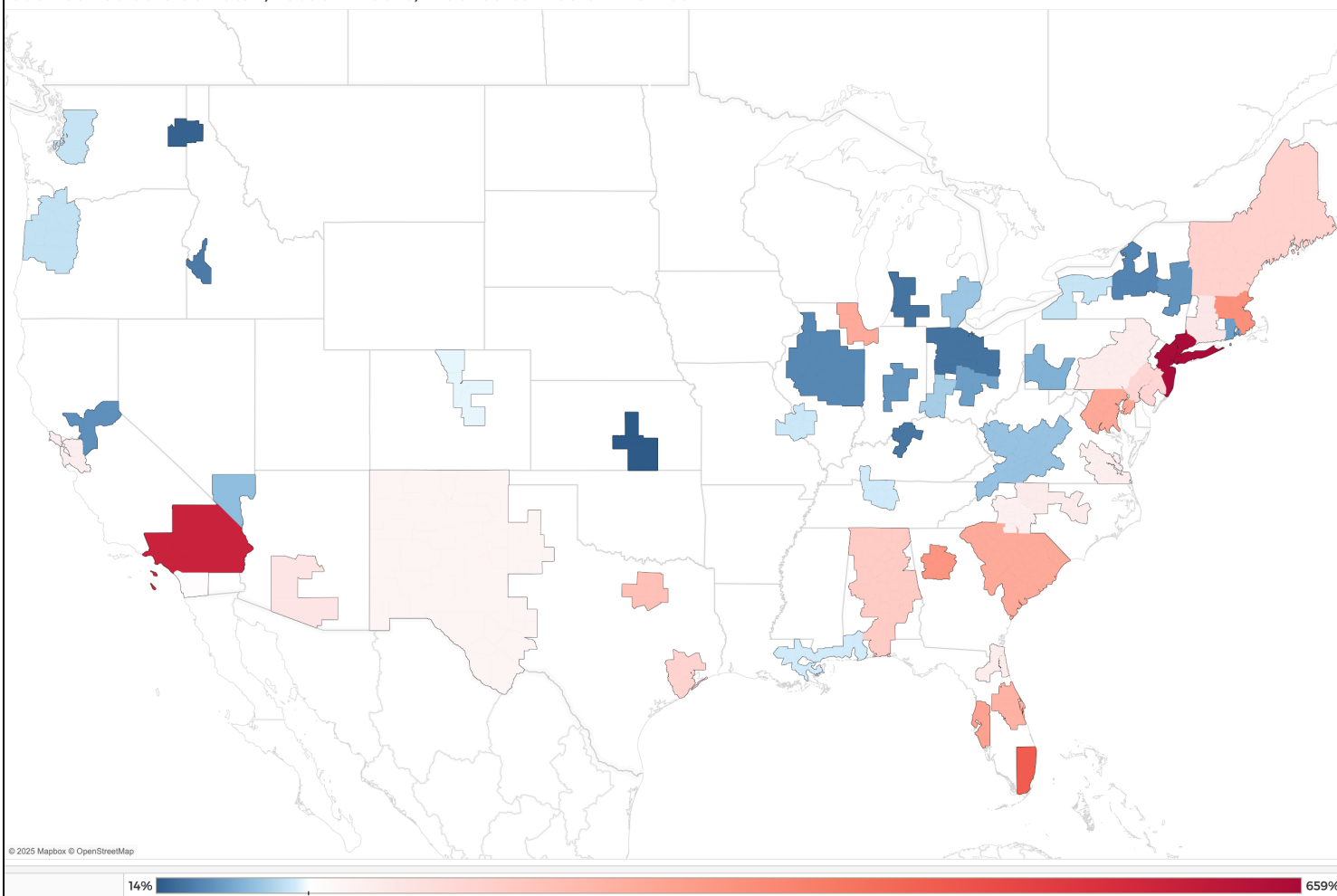
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PORTLAND	22,076,350	24,714,010	11.9%	TAMPA	27,410,175	27,220,321	-0.7%
DENVER	32,052,853	35,525,720	10.8%	PHILADELPHIA	57,177,070	56,762,904	-0.7%
SPOKANE	4,398,913	4,763,127	8.3%	HARTFORD/SPRINGFIELD	29,907,313	29,588,189	-1.1%
GRAND RAPIDS	19,352,821	20,538,035	6.1%	DALLAS/FT. WORTH	73,983,874	73,089,126	-1.2%
HARRISBURG/SCRANTON	39,951,789	42,180,075	5.6%	COLUMBUS	21,192,675	20,861,915	-1.6%
DETROIT	41,438,648	43,424,837	4.8%	SOUTH CAROLINA	59,967,588	58,886,906	-1.8%
WEST TEX/NEW MEXICO	38,018,187	39,777,815	4.6%	NEW ENGLAND	27,847,310	27,309,489	-1.9%
BUFFALO/ROCHESTER	25,397,452	26,293,700	3.5%	JACKSONVILLE	15,092,745	14,731,842	-2.4%
HOUSTON	54,281,562	55,970,841	3.1%	PROVIDENCE	7,566,382	7,364,013	-2.7%
BOISE	4,402,481	4,510,526	2.5%	PEORIA/SPRINGFIELD	14,920,566	14,489,260	-2.9%
RALEIGH/GREENSBORO	41,698,283	42,536,791	2.0%	NEW YORK	140,725,746	136,003,348	-3.4%
SYRACUSE	12,196,916	12,428,795	1.9%	PITTSBURGH	23,021,592	22,249,015	-3.4%
TOLEDO	16,669,952	16,955,831	1.7%	BALTIMORE/WASHINGTON	77,377,281	74,190,098	-4.1%
CHARLOTTE	34,543,696	35,085,222	1.6%	LOS ANGELES	118,670,086	113,721,037	-4.2%
INDIANAPOLIS	24,041,523	24,392,226	1.5%	SACRAMENTO	21,855,797	20,817,917	-4.7%
BOSTON	35,036,429	35,483,906	1.3%	SAN DIEGO	18,323,891	17,423,339	-4.9%
ALBANY	11,664,335	11,782,277	1.0%	ROANOKE	27,262,034	25,906,660	-5.0%
LAS VEGAS	18,835,479	19,008,186	0.9%	BIRMINGHAM/MONTGOMERY	35,052,786	33,254,269	-5.1%
CINCINNATI/DAYTON	29,904,885	30,084,470	0.6%	RICHMOND/NORFOLK	34,054,344	32,256,427	-5.3%
ORLANDO	29,603,591	29,741,030	0.5%	ATLANTA	47,005,946	44,432,487	-5.5%
PHOENIX/TUCSON	58,761,302	58,712,976	-0.1%	ST. LOUIS	26,104,972	24,513,166	-6.1%
WICHITA	9,241,997	9,229,436	-0.1%	MIAMI/FT. LAUDERDALE	38,143,860	34,488,420	-9.6%
SEATTLE	19,614,508	19,525,151	-0.5%	NEW ORLEANS/MOBILE	28,523,900	25,762,262	-9.7%
NASHVILLE	21,516,554	21,412,702	-0.5%	CHICAGO	75,084,834	63,620,590	-15.3%
LOUISVILLE	14,206,231	14,121,729	-0.6%	SAN FRANCISCO	22,472,428	18,132,870	-19.3%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	5,621,313	7,362,295	31.0%	ORLANDO	4,617,643	4,622,673	0.1%
ST. LOUIS	1,628,215	2,070,313	27.2%	RALEIGH/GREENSBORO	3,799,003	3,784,302	-0.4%
BUFFALO/ROCHESTER	3,244,991	3,825,003	17.9%	BALTIMORE/WASHINGTON	9,022,734	8,967,087	-0.6%
PEORIA/SPRINGFIELD	1,137,560	1,267,071	11.4%	HARRISBURG/SCRANTON	2,855,881	2,833,230	-0.8%
PROVIDENCE	671,565	747,365	11.3%	COLUMBUS	3,623,378	3,531,637	-2.5%
PITTSBURGH	3,247,257	3,562,397	9.7%	SOUTH CAROLINA	5,927,461	5,775,837	-2.6%
LOUISVILLE	1,098,418	1,196,466	8.9%	NASHVILLE	2,417,895	2,355,247	-2.6%
SACRAMENTO	4,565,530	4,904,788	7.4%	DETROIT	6,241,795	6,076,735	-2.6%
ROANOKE	2,675,492	2,869,337	7.2%	NEW YORK	10,267,658	9,967,096	-2.9%
SAN FRANCISCO	9,405,076	10,021,227	6.6%	MIAMI/FT. LAUDERDALE	7,377,465	7,147,940	-3.1%
JACKSONVILLE	1,814,642	1,931,142	6.4%	TAMPA	4,678,076	4,494,685	-3.9%
SYRACUSE	1,290,764	1,360,010	5.4%	WEST TEX/NEW MEXICO	4,098,664	3,932,218	-4.1%
SAN DIEGO	5,591,955	5,866,218	4.9%	TOLEDO	2,248,962	2,156,044	-4.1%
PHILADELPHIA	4,273,689	4,465,347	4.5%	BIRMINGHAM/MONTGOMERY	3,427,505	3,264,710	-4.7%
SPOKANE	690,441	719,743	4.2%	NEW ENGLAND	4,300,325	4,093,194	-4.8%
CINCINNATI/DAYTON	3,423,644	3,560,529	4.0%	RICHMOND/NORFOLK	4,221,338	3,943,331	-6.6%
GRAND RAPIDS	2,149,211	2,231,258	3.8%	SEATTLE	5,876,887	5,377,632	-8.5%
ALBANY	1,167,136	1,208,293	3.5%	HOUSTON	5,399,024	4,901,012	-9.2%
CHARLOTTE	3,291,306	3,380,583	2.7%	ATLANTA	5,528,456	4,991,358	-9.7%
LOS ANGELES	28,229,662	28,939,378	2.5%	DALLAS/FT. WORTH	7,904,528	6,980,052	-11.7%
INDIANAPOLIS	2,320,339	2,369,991	2.1%	HARTFORD/SPRINGFIELD	2,297,739	1,998,142	-13.0%
BOSTON	4,693,159	4,767,708	1.6%	WICHITA	629,883	541,172	-14.1%
BOISE	775,643	786,128	1.4%	DENVER	6,712,940	5,731,199	-14.6%
NEW ORLEANS/MOBILE	1,897,750	1,906,894	0.5%	LAS VEGAS	4,974,520	4,164,802	-16.3%
PORTLAND	4,956,715	4,970,311	0.3%	PHOENIX/TUCSON	11,624,518	9,355,756	-19.5%

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	2,964,474	3,550,762	19.8%	MIAMI/FT. LAUDERDALE	18,214,075	17,864,558	-1.9%
INDIANAPOLIS	1,644,618	1,862,470	13.2%	TAMPA	12,262,702	12,026,768	-1.9%
TOLEDO	1,006,829	1,121,673	11.4%	ATLANTA	13,878,834	13,239,724	-4.6%
ROANOKE	2,499,203	2,764,728	10.6%	GRAND RAPIDS	1,200,656	1,119,709	-6.7%
SYRACUSE	1,346,219	1,481,986	10.1%	HARTFORD/SPRINGFIELD	6,257,494	5,801,813	-7.3%
ALBANY	1,656,710	1,815,095	9.6%	NEW YORK	28,725,809	26,039,660	-9.4%
BUFFALO/ROCHESTER	3,169,409	3,470,683	9.5%	CHICAGO	12,988,816	11,418,836	-12.1%
DETROIT	2,696,140	2,833,406	5.1%	WEST TEX/NEW MEXICO	5,504,828	4,796,559	-12.9%
LOUISVILLE	1,145,454	1,195,931	4.4%	NEW ENGLAND	9,608,930	7,757,190	-19.3%
PEORIA/SPRINGFIELD	1,489,764	1,552,321	4.2%	PROVIDENCE	2,608,365	2,044,582	-21.6%
ORLANDO	10,272,261	10,628,530	3.5%	NEW ORLEANS/MOBILE	4,845,729	3,633,934	-25.0%
COLUMBUS	1,991,635	2,056,258	3.2%	HOUSTON	10,203,831	7,567,264	-25.8%
SACRAMENTO	1,684,842	1,739,136	3.2%	BALTIMORE/WASHINGTON	15,795,105	11,463,708	-27.4%
RICHMOND/NORFOLK	5,048,494	5,194,028	2.9%	LOS ANGELES	32,090,875	23,078,455	-28.1%
PITTSBURGH	2,328,302	2,394,165	2.8%	BOSTON	19,072,367	13,684,811	-28.2%
HARRISBURG/SCRANTON	5,258,390	5,394,516	2.6%	PHILADELPHIA	10,503,448	7,344,152	-30.1%
SAN FRANCISCO	5,126,170	5,243,002	2.3%	DENVER	5,492,484	3,787,636	-31.0%
CINCINNATI/DAYTON	2,943,934	2,997,900	1.8%	PHOENIX/TUCSON	9,201,862	6,008,249	-34.7%
CHARLOTTE	5,011,929	5,094,046	1.6%	DALLAS/FT. WORTH	15,099,889	9,349,294	-38.1%
SOUTH CAROLINA	11,197,949	11,346,324	1.3%	LAS VEGAS	4,488,546	2,661,689	-40.7%
NASHVILLE	3,583,629	3,621,388	1.1%	BOISE	2,217,118	1,284,946	-42.0%
WICHITA	555,263	560,818	1.0%	PORTLAND	5,938,748	3,403,442	-42.7%
BIRMINGHAM/MONTGOMERY	8,308,395	8,381,566	0.9%	SAN DIEGO	7,377,270	4,118,509	-44.2%
RALEIGH/GREENSBORO	5,517,348	5,520,758	0.1%	SPOKANE	1,527,245	736,307	-51.8%
JACKSONVILLE	5,412,221	5,387,220	-0.5%	SEATTLE	7,586,542	3,454,660	-54.5%