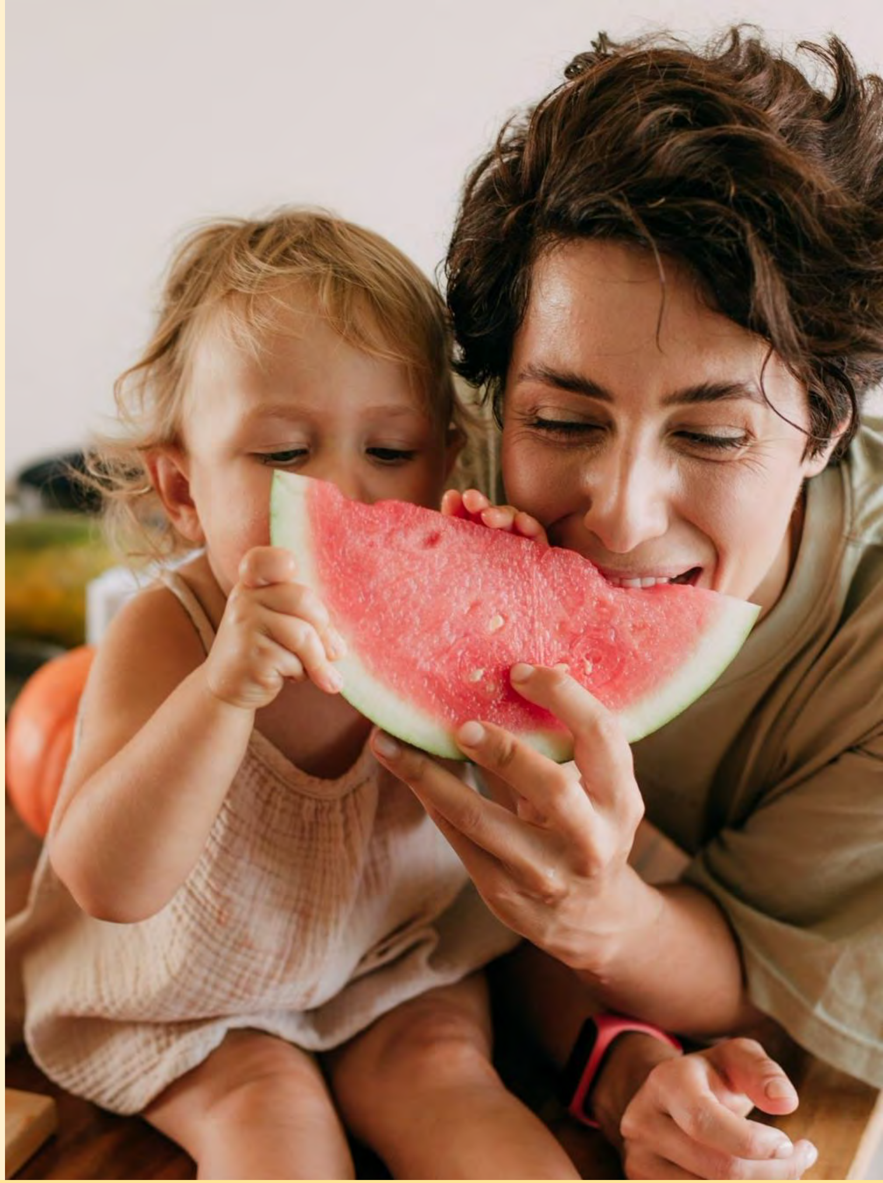
National Watermelon Promotion Board

2025

Omni-Channel Strategies for Watermelon Category Growth

HIGH-VALUE WATERMELON SHOPPER STUDY



Prepared by FUSION Clear Direction For Your Business™

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The fresh watermelon category delivered solid growth during the 52 weeks ending 05-31-2025, continuing its positive trajectory established in recent years. Compared to 2021, household penetration rose +3 points, with three out of four U.S. households purchasing watermelon. Trips increased +12% to 543M, while average annual household spend grew +24% to $31.64. These shifts generated +$782M in incremental purchase dollars, driving total category sales to nearly $3.2B, up +33% vs. 2021.

Household penetration reached 75% after nearly +7M additional households entered the watermelon category compared to 2021. Most new households were Light shoppers, but Heavies remained the clear growth driver. Representing 25% of watermelon households, the Heavy segment accounted for 63% of purchase dollars and generated +$464M (59%) of incremental gains. While Lights made up half of all watermelon households, Heavies shopped +6x more often and spent +8x more on watermelon annually.

Grocery remained the leading retail channel, with eight in ten watermelon households purchasing there. Grocery delivered 62% of purchase dollars and generated 59% of incremental growth for the category. Watermelon households made more than four Grocery trips on average in 2025, up +4% vs. 2021, spending $5.71 per trip (+19%).

Since 2021, Grocery lost over -1 point of its dollar share as households, especially from the Light and Medium segments, expanded into Mass, Club, and Online. Importantly, this growth did not cannibalize Grocery. Instead, cross-channel purchasing lifted watermelon sales across major channels, with Mass, Club, and Online together generating half of positive incremental trips.

Watermelon households in 2025 tended to be older, in one-person or two-person homes, married, and higher income. Since 2021, the 65+ age group and one-person households grew the fastest, while never-married and high-income households also expanded. The category became more diverse as Black/African American, Hispanic/Latino, and Asian households gained share, while suburban and urban households grew and rural declined. Compared to Light shoppers, Heavies skewed younger, in larger households, more diverse, and less rural, creating a distinct profile within the category.

In 2025, watermelon expanded its reach across channels and demographics. By aligning strategies with the needs of Heavy shoppers and engaging the Light and Medium segments where they are growing, marketers and retailers could help strengthen loyalty, broaden penetration, and capture more shopping occasions. Leveraging the insights from this study provides a foundation to elevate watermelon's presence and position the category for its next wave of growth.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Tailor Strategies to Distinct Opportunities Across Channels

Grocery remained the leading retail channel for total watermelon purchases and drove category growth. However, Mass, Club, and Online channels saw greater growth rates, highlighting opportunities to strengthen omni-channel engagement.

Mass, Club and Online channel growth was driven by an influx of watermelon shoppers in those channels. However, this growth did not cannibalize watermelon purchases from the Grocery channel. Instead, purchases increased across all channels as shoppers engaged more in cross-channel purchasing.

Leveraging tailored strategies by channel creates opportunities to grow fresh watermelon sales. For Grocery, opportunities may lie in purchase frequency: bringing Heavy shoppers back into stores more often. In Mass, Club, and Online, the focus is increasing the share of watermelon households shopping these channels. Taking an omni-channel approach with promotional efforts can help strengthen watermelon's role in both established and emerging channels.

The Club Channel Presents Unique Opportunity

Club has become an increasingly important outlet for watermelon, showing strong growth since 2021.

Much of this growth came from Light and Medium shoppers entering the channel, expanding Club's watermelon household base beyond the Heavy segment. However, purchase trips in Club remained relatively low, even among Heavies who otherwise purchase more often in other major channels.

This points to a channel-specific opportunity. In addition to encouraging cross-channel purchasing, there may be an opportunity in Club to increase spend per trip. While purchase frequency is lower in the Club channel, the industry can increase spend per trip by exploring alternative package configurations that fit Club's naturally bulk-focused shopping trips. Working strategically with Club retailers could help highlight watermelon's versatility and position it as an incremental and repeat purchase within this channel.

Watermelon Finds Growth Across Generations and Lifestyles

Watermelon household demographics are evolving, with growth seen among smaller, higher-income, younger, and more diverse households, many of which are increasingly divorced, or never married. At the same time, engagement is also rising among the oldest household group (65+).

Even within the Heavy segment, demographic shifts are evident, trending toward smaller households, higher incomes, and more diverse shoppers who are often divorced, or never married. Growth is also occurring at both ends of the age group spectrum, with increases among younger and older households. This highlights the importance of continuing to target core shoppers while expanding messaging to inspire engagement among younger singles in smaller, higher-income households.

Visit Watermelon.org for more retail and consumer research that can identify opportunities and help pave the way for the next surge in category growth.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

TERMS AND DEFINITIONS

Product
Fresh Watermelon

Time Periods
2025: 52 weeks ending 05-31-2025
2021: 52 weeks ending 05-31-2021

Geographies
Total U.S.

Channels

- Grocery: traditional food stores
- Mass: Target, Walmart, etc.
- Club: Costco, Sam's Club, BJ's, etc.
- Online: Amazon, online retailer websites
- C-Store: gas, convenience
- All Other: dollar, military, drug
- Third-party Apps (e.g. DoorDash) are not recorded as online purchases. For example: a Costco DoorDash order would record as a Costco purchase, not an online purchase

Source
Numerator Insights. This report reflects omnichannel household panel data. The panel consists of a representative sample of over 100K U.S. households balanced to the general U.S. population

Study Development
Fusion (GoWithFusion.com)

Demographic Index
- **Heavy vs. Light Index (Low/High)**
  Measures the Heavy segment's share of watermelon households per demographic group relative to the Light segment's share. Indices of 120 and above are considered high, below 80 are low, and between 80 and 120 are on par with the Light segment

Annual Purchase Trends — All Metrics Are Rounded

- **Households (Shoppers)**
  Households that purchased watermelon
- **Household Penetration (%)**
  The percentage of U.S. households that purchased watermelon
- **Household Growth**
  The increase in watermelon-purchasing households vs. the prior period
- **Segment**
  Categorization of watermelon shoppers based on annual spend (Light, Medium, Heavy)
- **Purchase Dollars**
  The amount spent on watermelon by households
- **Units**
  The number of watermelon products (whole, cut, sliced, etc.) purchased by households
- **Annual Spend**
  A household's average annual purchase dollars spent on watermelon
- **Repeat Shoppers (%)**
  Percentage of households that purchased watermelon more than once during the reporting period
- **Purchase Trips**
  The annual number of shopping trips in which watermelon was purchased
- **Spend per Trip**
  The amount of purchase dollars spent on watermelon per purchase trip
- **Units per Trip**
  The number of watermelon units purchased per trip
- **Incremental**
  The additional value the watermelon category gained or lost compared to the previous analysis period
- **Segment Share (%)**
  The share of total purchase dollars, units, trips, or households attributed to Light, Medium, or Heavy shoppers

NUMERATOR OMNIPANEL INFORMATION

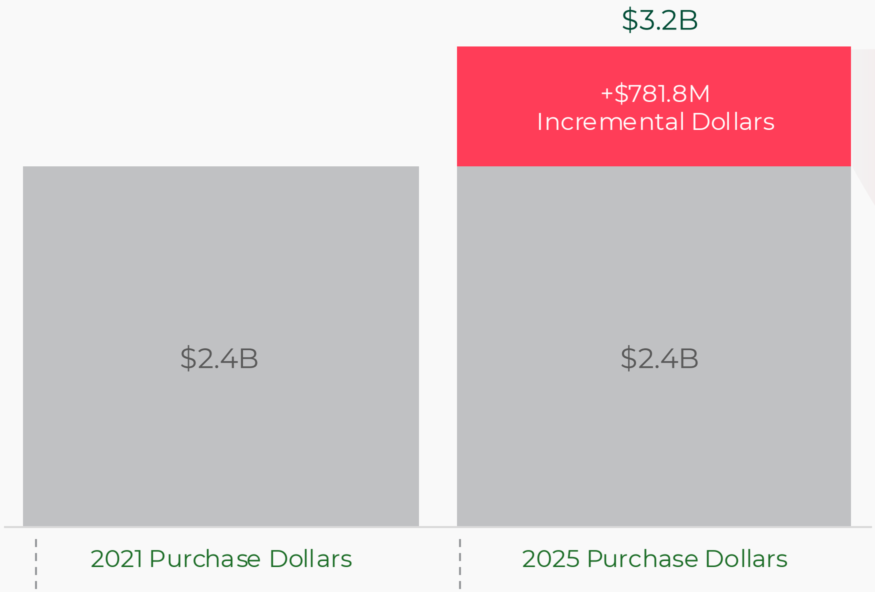
This report is based on household purchasing data from Numerator OmniPanel. Numerator gathers its household purchasing data through a comprehensive receipt-scanning panel, where panelists are incentivized to submit receipts from both online and in-store purchases via a mobile app. This approach captures a broad, representative sample of over 100K+ U.S. households and provides insights into consumer purchasing behaviors across various retail channels.

Household purchasing data focuses on shoppers' purchase behaviors and provides valuable insights into watermelon category dynamics. It assists with identifying the shoppers driving category growth, who they are and where they buy, and analyzing how they are contributing to it. This deeper understanding of shopper dynamics allows marketers and retailers to optimize their marketing strategies, engage key shopper segments, and capitalize on emerging growth opportunities within the category.

UNDERSTANDING INCREMENTAL GROWTH

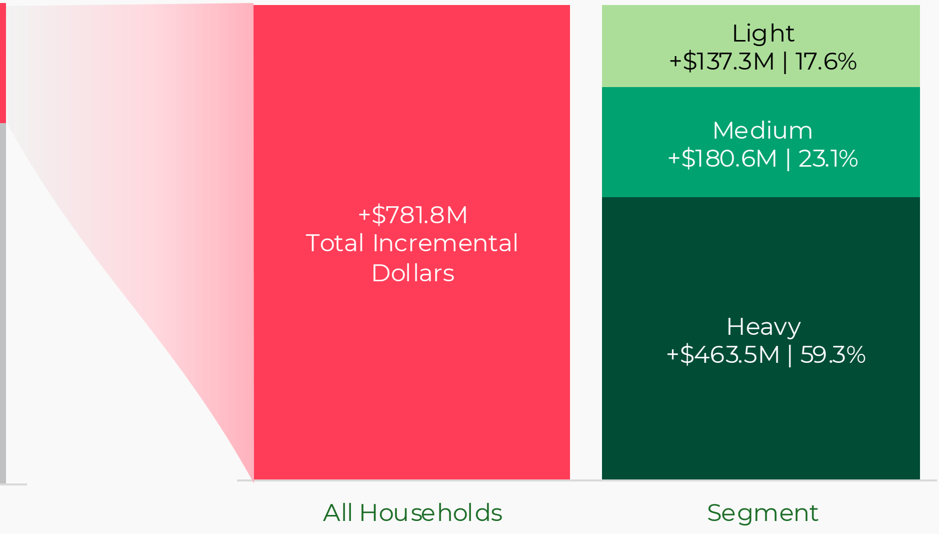
Incremental purchase dollars, units, trips, and households refer to the additional value the watermelon category gained or lost compared to the previous year. These incremental changes highlight the net growth (or decline) achieved in 2025 vs. 2021.

Incremental Purchase Dollars



Share of Incremental Purchase Dollars by Segment

2025 vs. 2021



How did each segment contribute to the incremental growth?
The data shows that Heavy households contributed +$463.5M (59.3%) of the +$781.8M incremental growth, despite representing only 25% of total purchase dollars.

The watermelon category's total purchase dollars were $2.4B for the 52 weeks ending 5-31-2021.

For the 52 weeks ending 5-31-2025, the category grew to $3.2B, adding +$781.8M in incremental purchase dollars over the same period in 2021.

Incremental drivers are the factors that contributed to or reduced this growth. By analyzing these drivers, we can gain insights into how the watermelon category is evolving and identify the forces propelling the category forward.

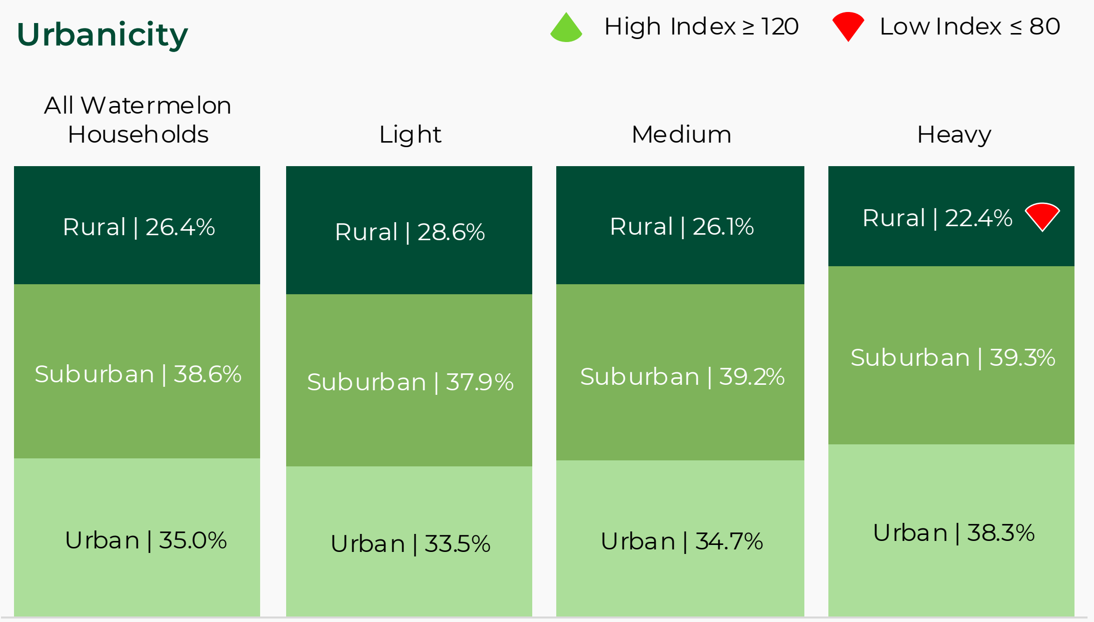
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

UNDERSTANDING DEMOGRAPHIC INDEX

Demographic index measures the Heavy segment's share of watermelon-purchasing households relative to their percentage in the Light segment.

(Heavy segment / Light segment) * 100 = Index

- Indices that are **120 and above skew high**
  - demographic group represents a higher share of Heavy watermelon shoppers relative to their share of Light shoppers
- Indices that are **80 and below skew low**
  - demographic group represents a smaller share of Heavy watermelon shoppers relative to their share of Light shoppers
- Indices **higher than 80 but lower than 120 are considered to be on par** with the Light segment
  - demographic group represents a similar share of Heavy watermelon shoppers relative to their share of Light shoppers



*Rural households made up **28.6%** of the **Light** segment.*

*Rural households made up **22.4%** of the **Heavy** segment.*

Example: Urbanicity index (22.4% / 28.6%) * 100 = 78

The Heavy segment's share of rural households is significantly lower than that of the Light segment. These households have a low index of 78.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025

1

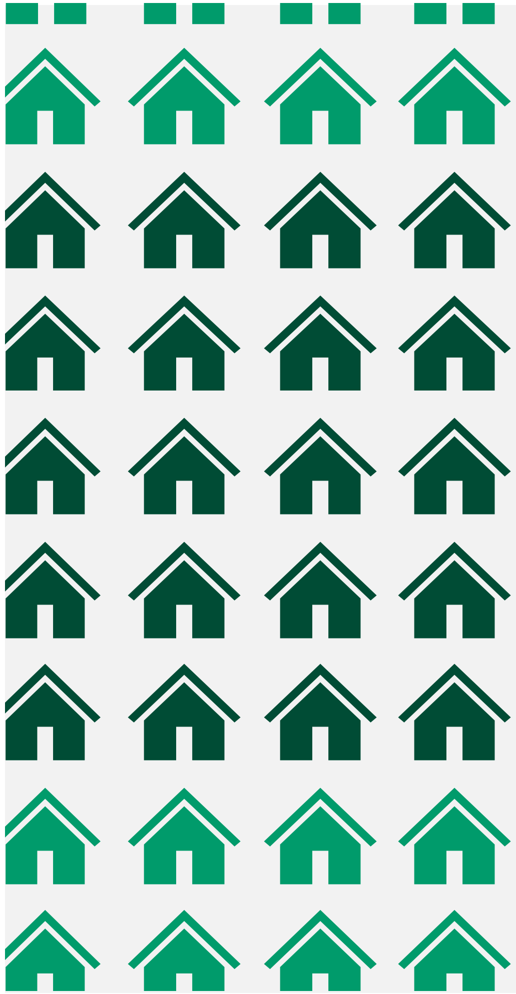
WATERMELON ANNUAL PURCHASE TRENDS

Nearly +7M additional households purchased fresh watermelon in the past year, lifting household penetration to over 75%.

Household Penetration

75.2%

+3.0 pts. vs. 2021



Household Growth

+6.7M

additional households

+7.2% vs. 2021

All figures rounded

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Of those households that purchased watermelon over the last year, nearly 74% purchased more than once, up +1 point compared to 2021.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Watermelon households purchased more often this year vs. 2021, averaging over 5 trips (+4% vs. 2021), buying 1 unit on average and spending $5.81 per trip (+19% vs. 2021).

Purchase Units per Trip per Household

1.1 units

-1.0% vs. 2021

Annual Purchase Trips per Household

5.4 trips

+4.4% vs. 2021

Spend per Trip per Household

$5.81 per trip

+18.8% vs. 2021

Annual Spend per Household

$31.64 annually

+24.0% vs. 2021

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Watermelon households made nearly 543M trips for watermelon over the past 12 months (+12% vs. 2021), spending more than $3B.

Total Purchase Units

612.4M units

+10.8% vs. 2021

Total Purchase Trips

542.7M trips

+11.9% vs. 2021

Total Purchase Dollars

$3.2B

+33.0% vs. 2021

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

2025 SHOPPER PROFILE: ALL WATERMELON HOUSEHOLDS

$3.2B **Watermelon Purchase Dollars**
+33.0% vs. 2021

75.2% **Household Penetration**
+3.0 pts. vs. 2021

73.6% **Repeat Shoppers**
+1.3 pts. vs. 2021

$31.64 **Annual Spend**
+24.0% vs. 2021

5.4 **Annual Trips per Household**
+4.4% vs. 2021

$5.81 **Spend per Trip per Household**
+18.8% vs. 2021

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Annual Opportunity for the Watermelon Category

AN INCREASE IN…

+1 pt. **Household Penetration** represents an annual purchase dollar opportunity of +$41.9M	**75.2%** $3,153,218,302	+1 pt.	**76.2%** $3,195,145,348	**+$42M** annual purchase dollar opportunity
+$1 **Spend per Trip** represents an annual purchase dollar opportunity of +$542.7M	**$5.81** $3,153,218,302	+$1	**$6.81** $3,695,908,180	**+$543M** annual purchase dollar opportunity
+1 **Purchase Trip** represents an annual purchase dollar opportunity of +$579.0M	**5.4** $3,153,218,302	+1	**6.4** $3,732,201,981	**+$579M** annual purchase dollar opportunity

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2021

2

WATERMELON ANNUAL PURCHASE TRENDS

BY SHOPPER SEGMENT

Watermelon households were divided into three segments: Heavy, Medium, and Light.

Watermelon Shopper Segmentation

(% share of households)

This shopper segmentation study ranked watermelon-purchasing households according to each household's average annual watermelon spend (low to high). This ranked list was then divided into three segments (shopper groups).

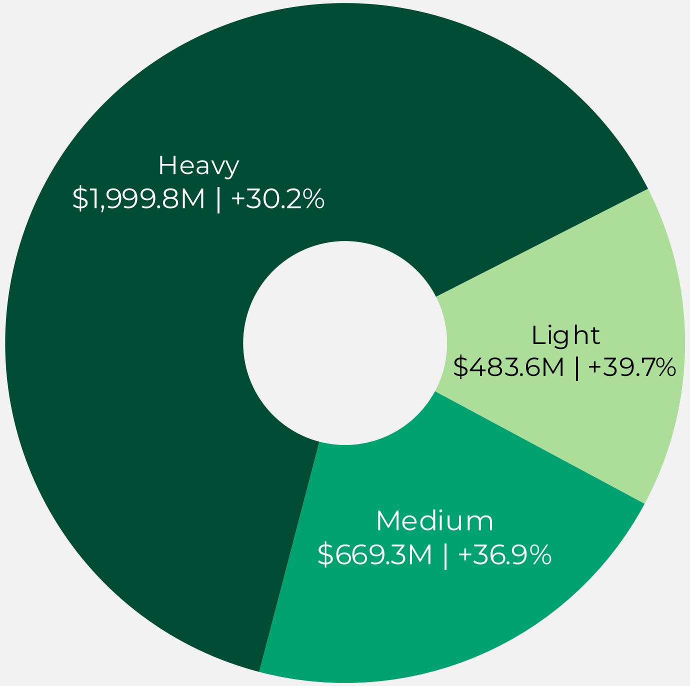
Segmentation Definitions

- **Light** — Shoppers in the bottom 50% of fresh watermelon households that spend less than $15.44 per household on watermelon annually
- **Medium** — Shoppers in the middle 25% of fresh watermelon households that spend between $15.45 and $31.00 per household on watermelon annually
- **Heavy** — Shoppers in the top 25% of fresh watermelon households that spend $31.01 or more per household on watermelon annually

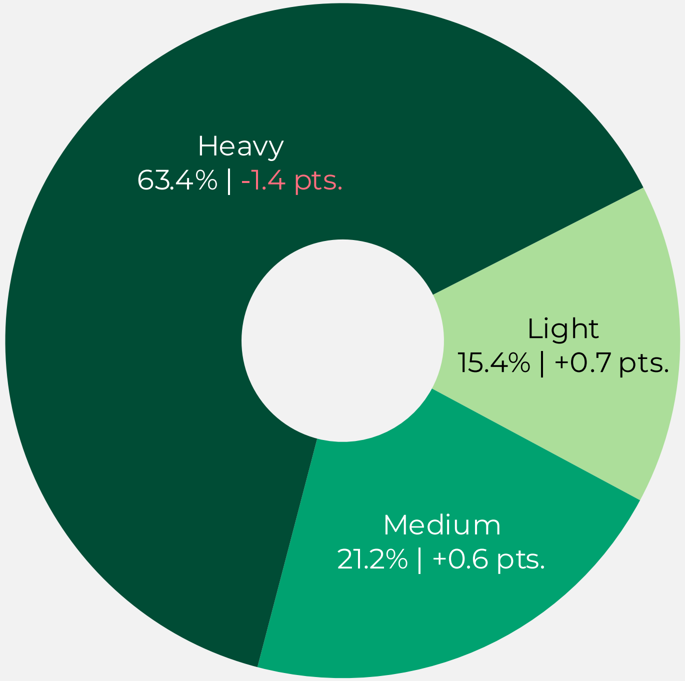
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025

Heavy shoppers made up 25% of watermelon households yet contributed $2B to the category, or 63% of total purchase dollars, during the past year.

Purchase Dollars by Segment
with change vs. 2021



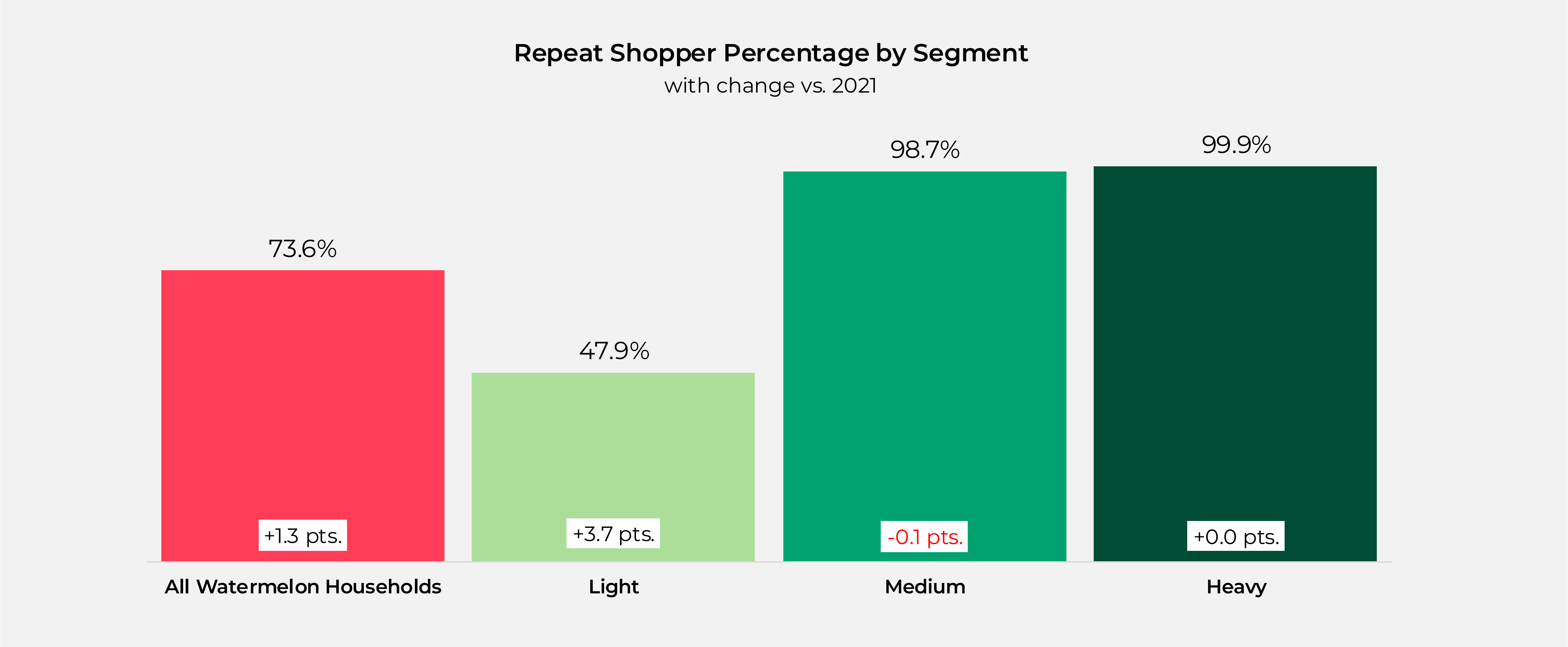
Segment Share of Purchase Dollars
with change vs. 2021



Shopper Segment	Segment Share Of... Purchase Units: Share	Purchase Units: Change vs. 2021	Purchase Trips: Share	Purchase Trips: Change vs. 2021
Light	17.7%	+0.4 pts.	18.5%	+0.6 pts.
Medium	21.8%	+0.4 pts.	22.6%	+0.5 pts.
Heavy	60.5%	-0.8 pts.	58.9%	-1.1 pts.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

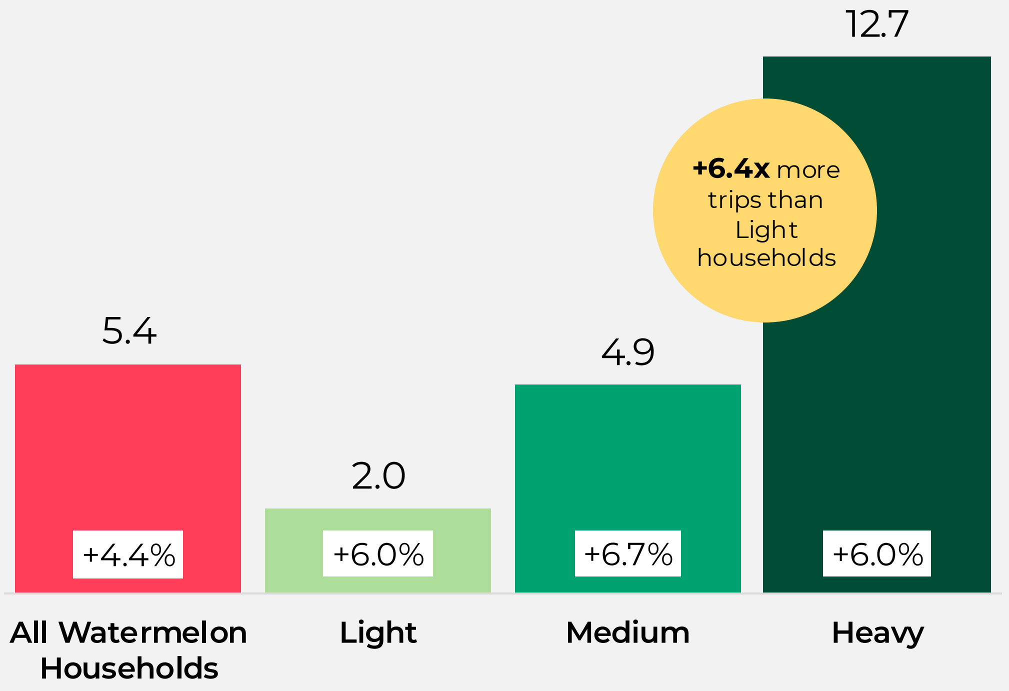
The repeat shopper rate within the Light segment increased vs. 2021, while Mediums and Heavies remained flat. Nearly all Medium and Heavy shoppers purchased watermelon more than once in 2025.



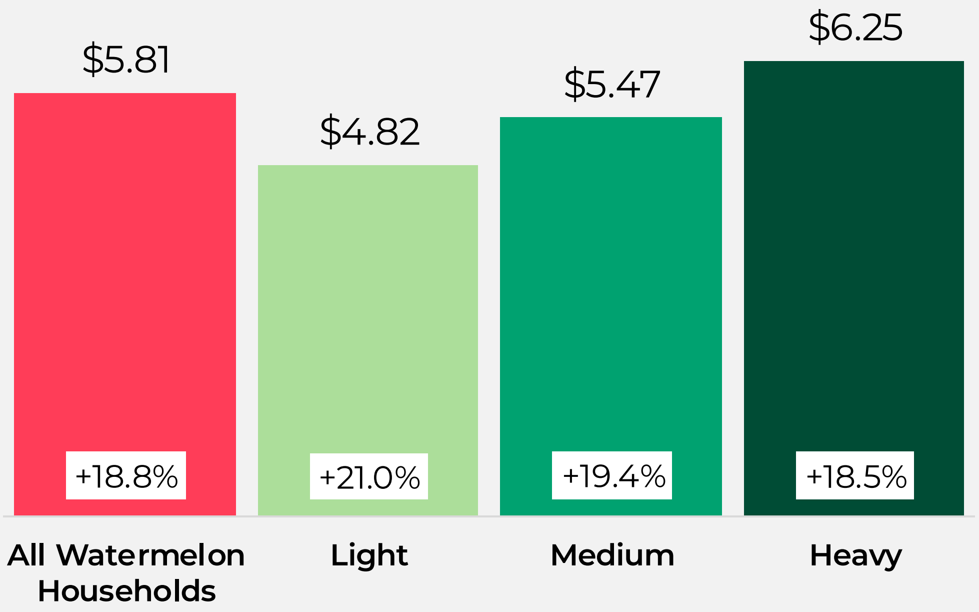
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

All segments increased watermelon purchase trips vs. 2021, with Heavy shoppers making +6x as many trips as the Light segment. Spend per trip also rose, up +19% for Heavies and +21% for Lights.

Average Annual Purchase Trips per Household by Segment
with change vs. 2021

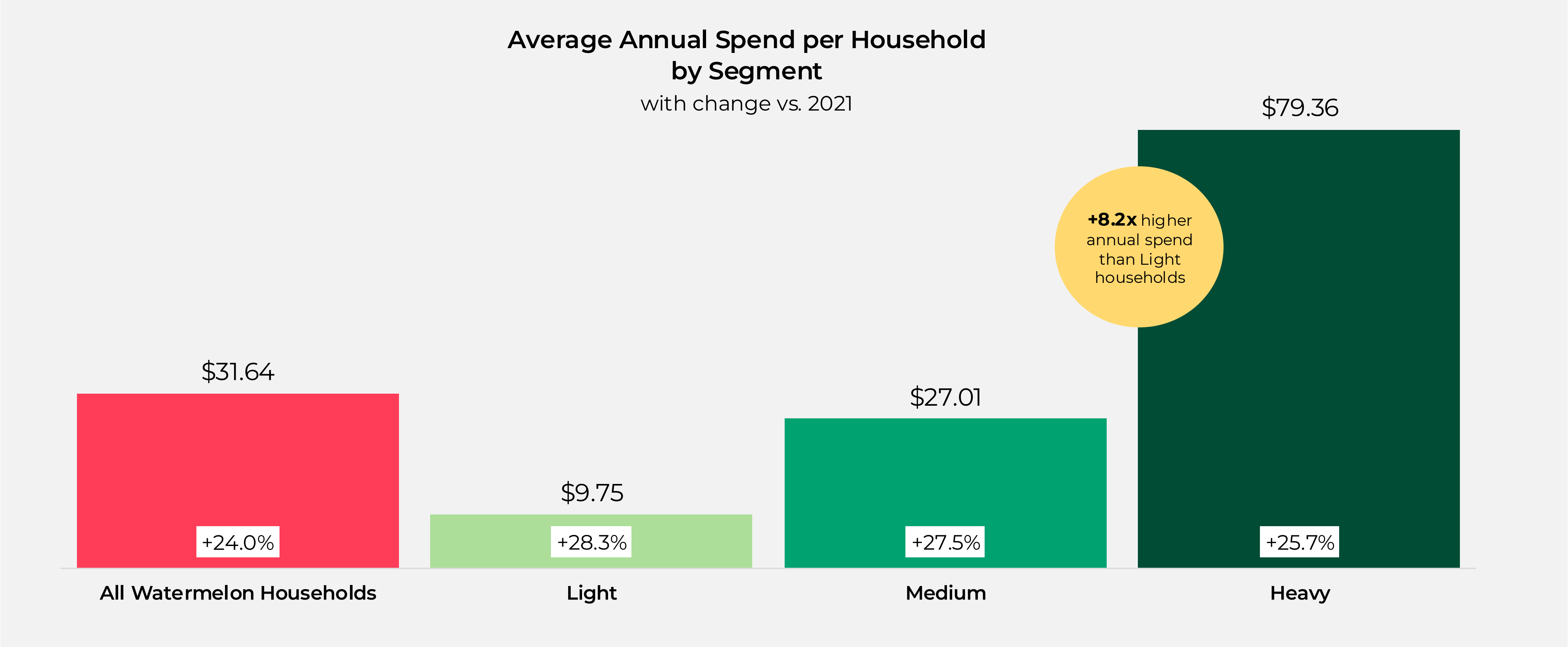


Average Spend per Trip per Household by Segment
with change vs. 2021



All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

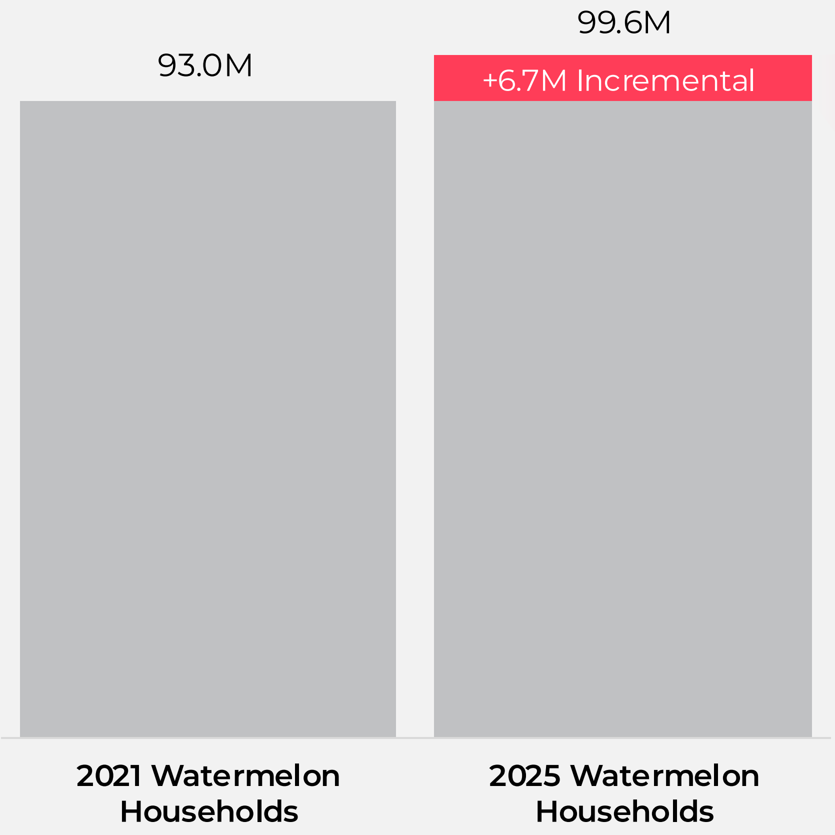
Heavy shoppers spent an average of $79 on watermelon over the past year, +8x that of Light shoppers. Average annual spend increased for all segments, ranging from +26% for Heavies and +28% for Lights.



All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

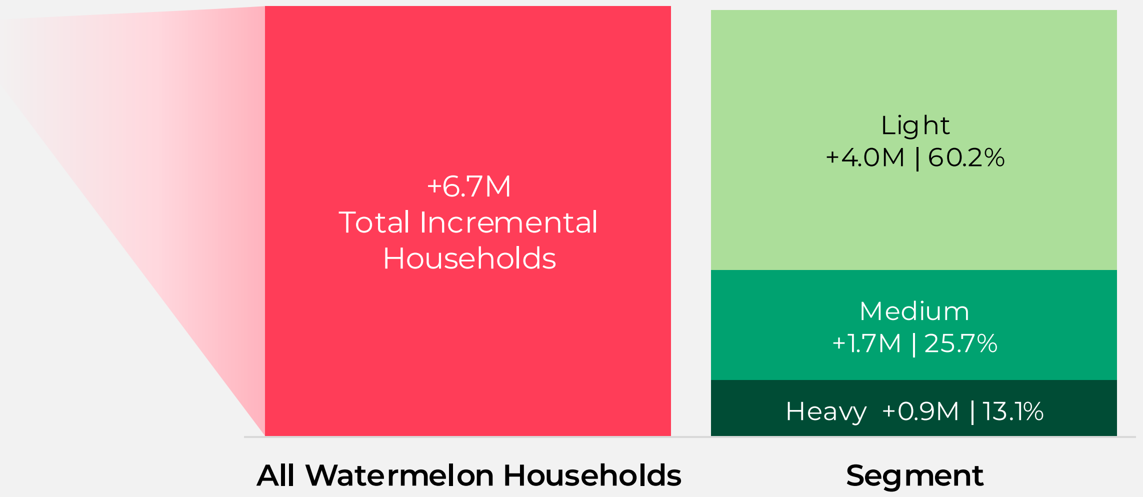
Among the nearly +7M additional households that entered the watermelon category compared to 2021, 4M (60%) were Light shoppers, while less than a million (13%) were Heavies.

Total Category Incremental Households



Share of Incremental Households by Segment

2025 vs. 2021

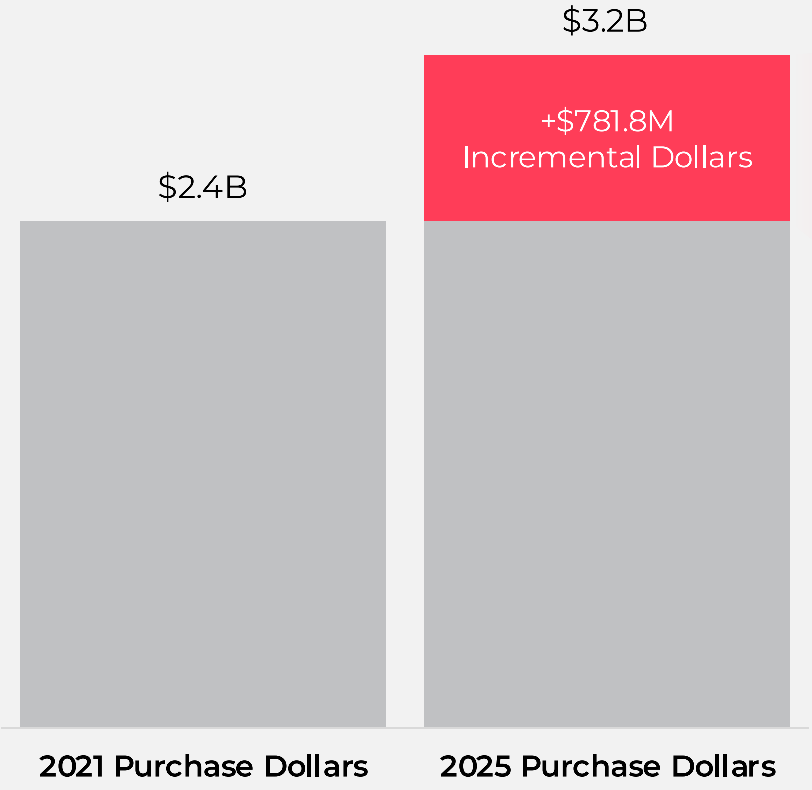


Shopper Segment	Total Watermelon Households	Change vs. 2021
Light	49.6M	+8.8%
Medium	24.8M	+7.4%
Heavy	25.2M	+3.6%

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

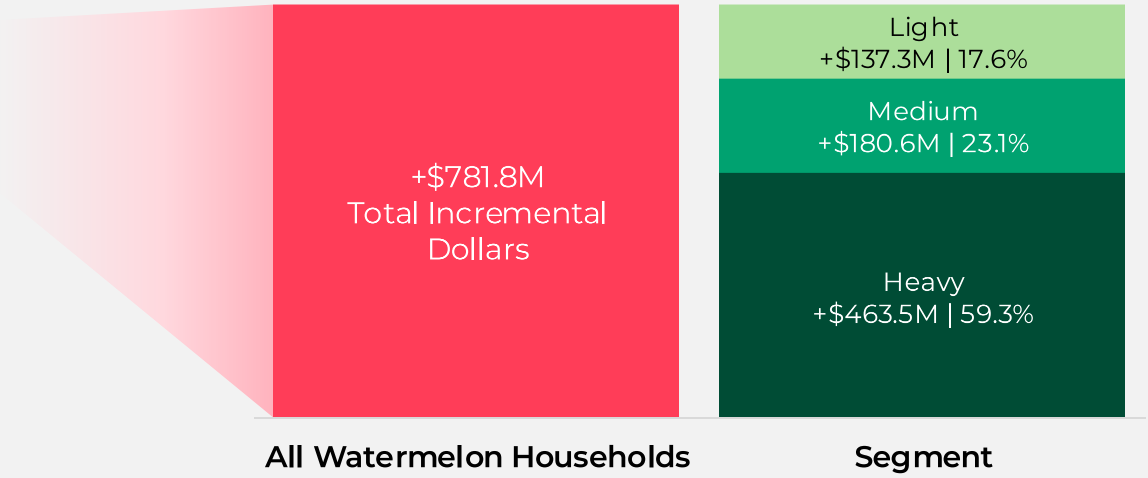
Incremental purchase dollar growth was driven primarily by Heavy shoppers who generated nearly +$464M (59%) for the watermelon category vs. 2021.

Total Category Incremental Purchase Dollars



Share of Incremental Purchase Dollars by Segment

2025 vs. 2021



Shopper Segment	Total Purchase Dollars	Change vs. 2021
Light	$483.6M	+39.7%
Medium	$669.3M	+36.9%
Heavy	$1,999.8M	+30.2%

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

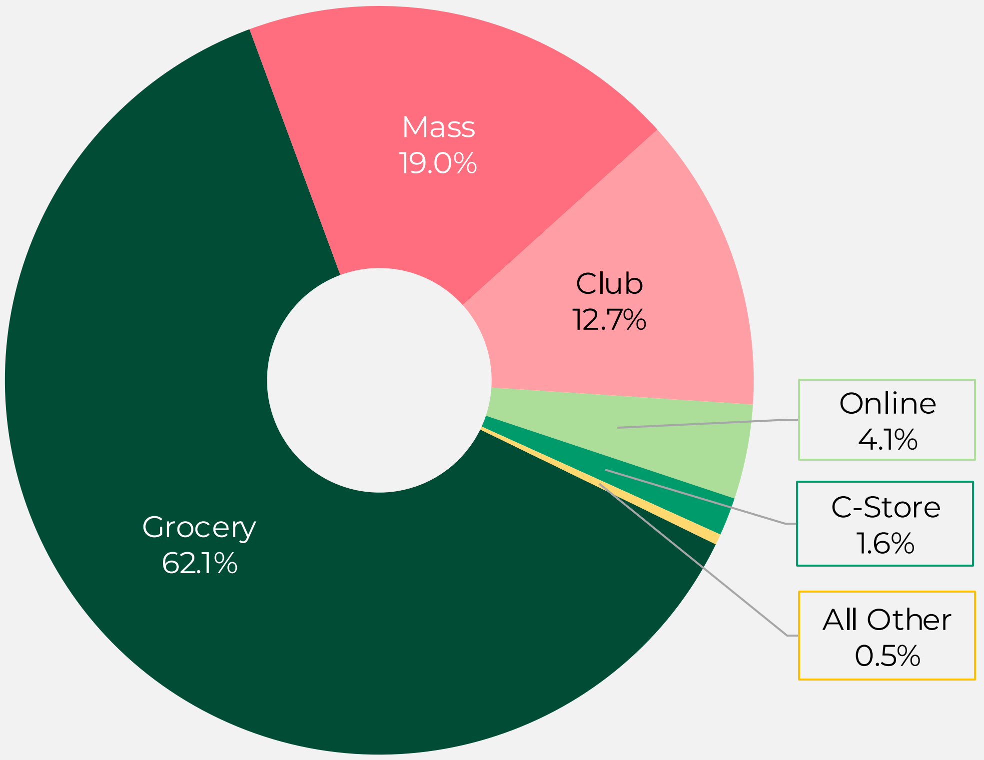
3

WATERMELON ANNUAL PURCHASE TRENDS

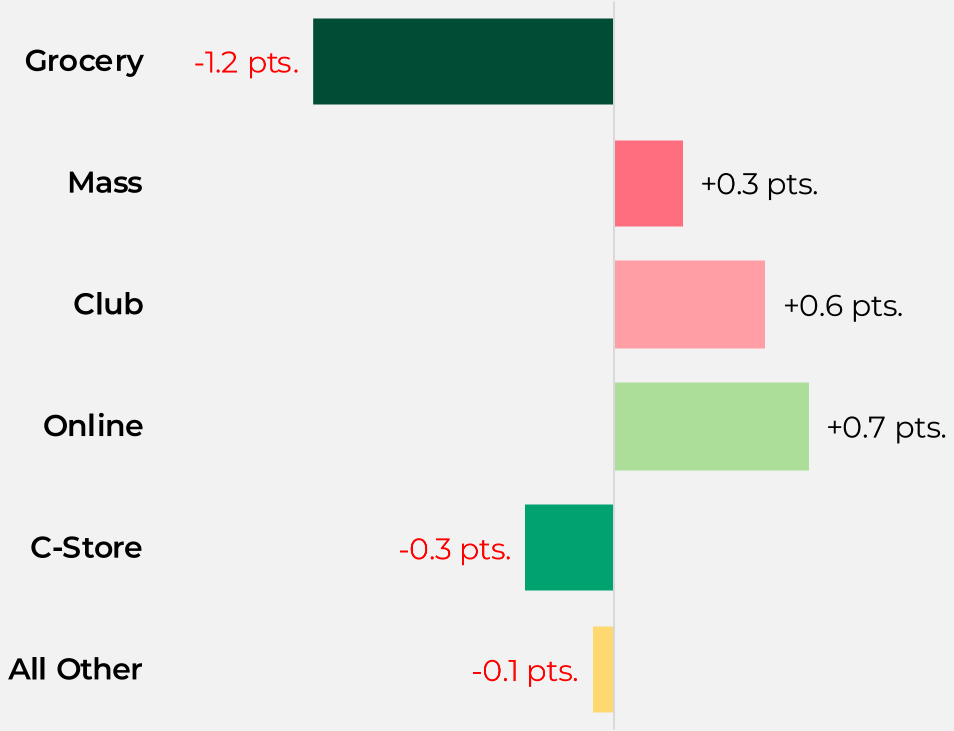
BY RETAIL CHANNEL

Over the past year, 62% of watermelon purchases occurred in Grocery. Mass, Club, and Online gained share of purchase dollars, while Grocery, C-Store, and All Other declined.

Channel Share of Purchase Dollars



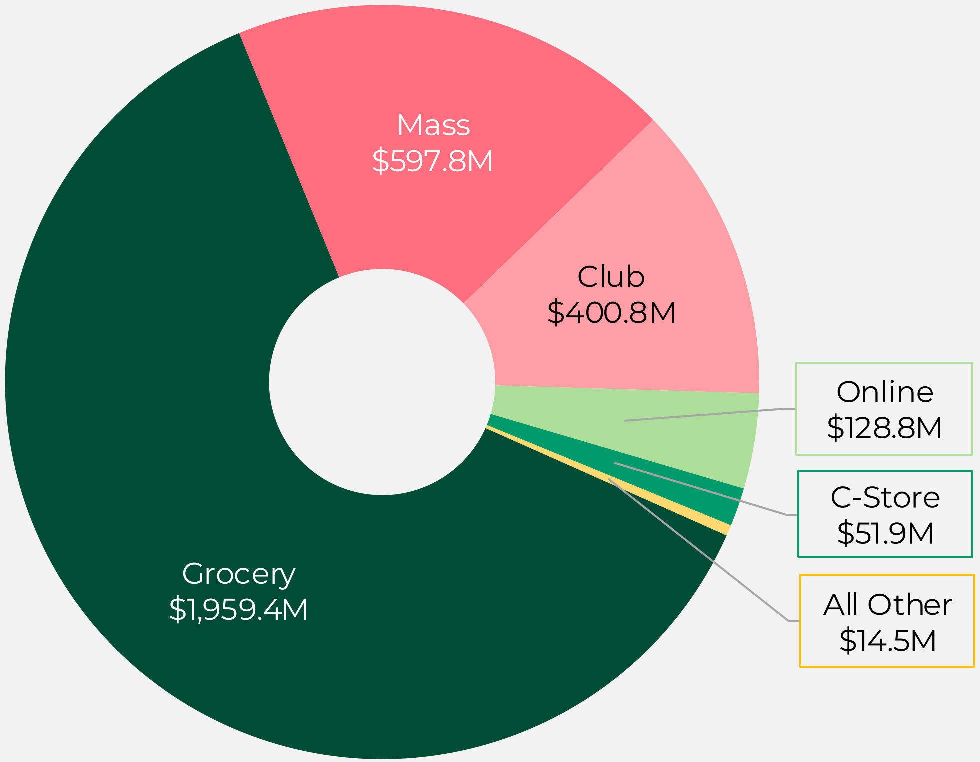
Channel Share of Purchase Dollars Change vs. 2021



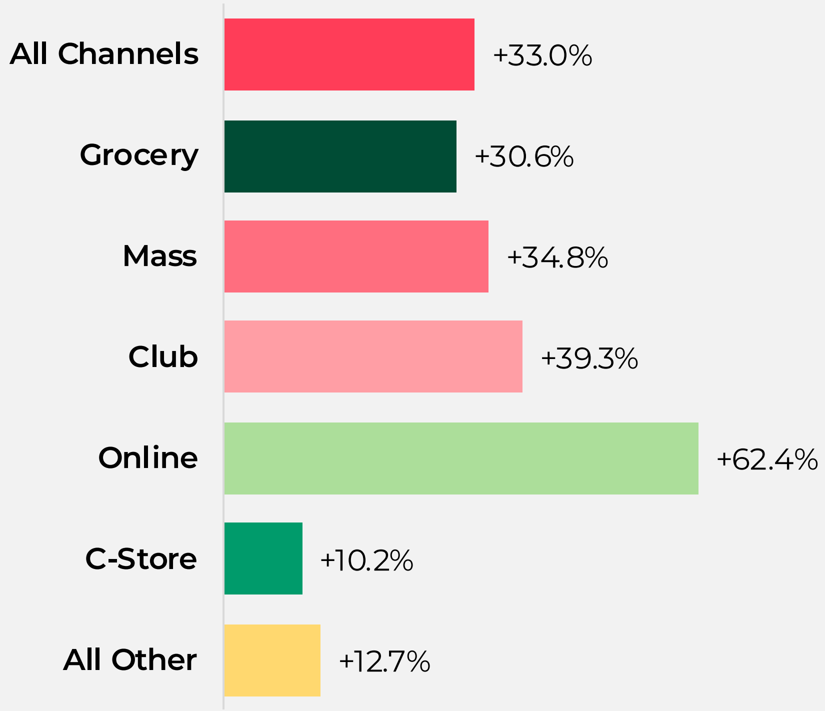
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Purchase dollar spend within the Grocery channel grew +31% vs. 2021 and accounted for $2B. The Online channel saw the highest growth rate, up +62%, generating $129M for the watermelon category in 2025.

Total Purchase Dollars by Channel



Total Purchase Dollars by Channel Change vs. 2021

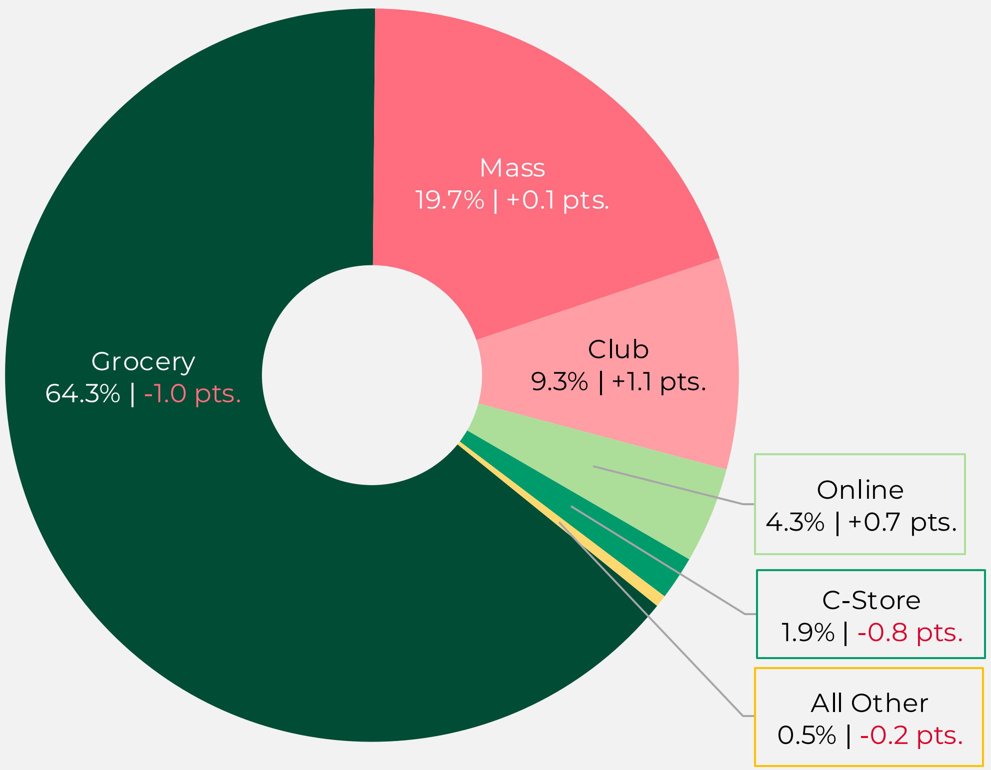


All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

The majority of units and purchase trips were made within the Grocery channel, however, it lost share to Mass, Club, and Online, with Club claiming +1 share point vs. 2021.

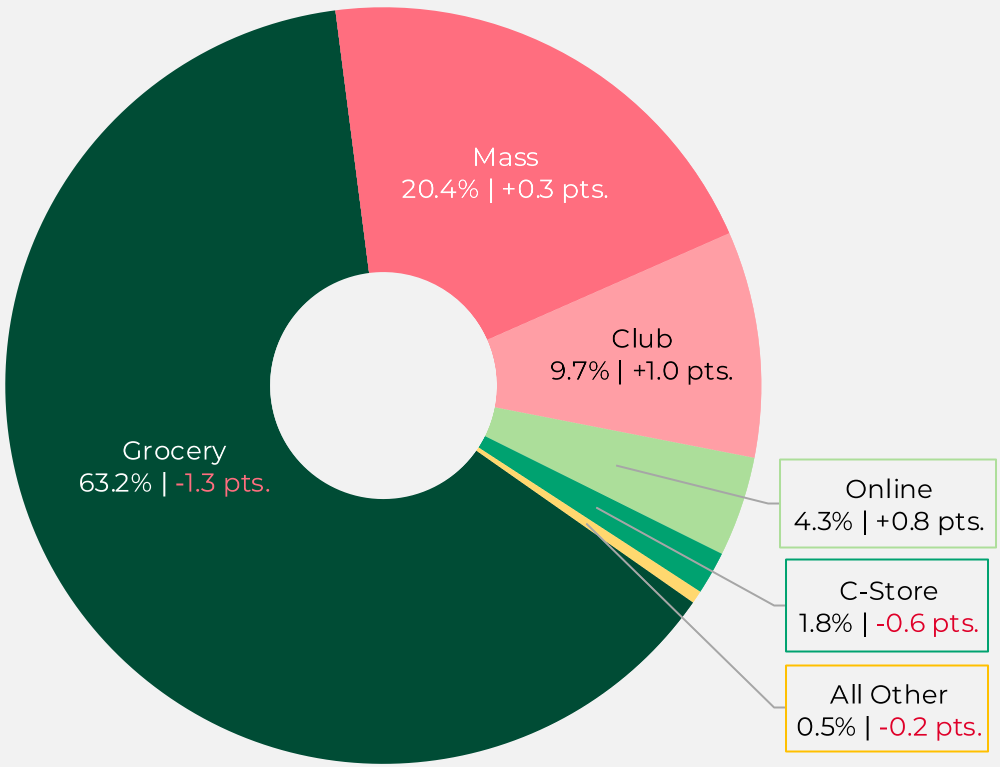
Channel Share of Purchase Units

with change vs. 2021



Channel Share of Purchase Trips

with change vs. 2021



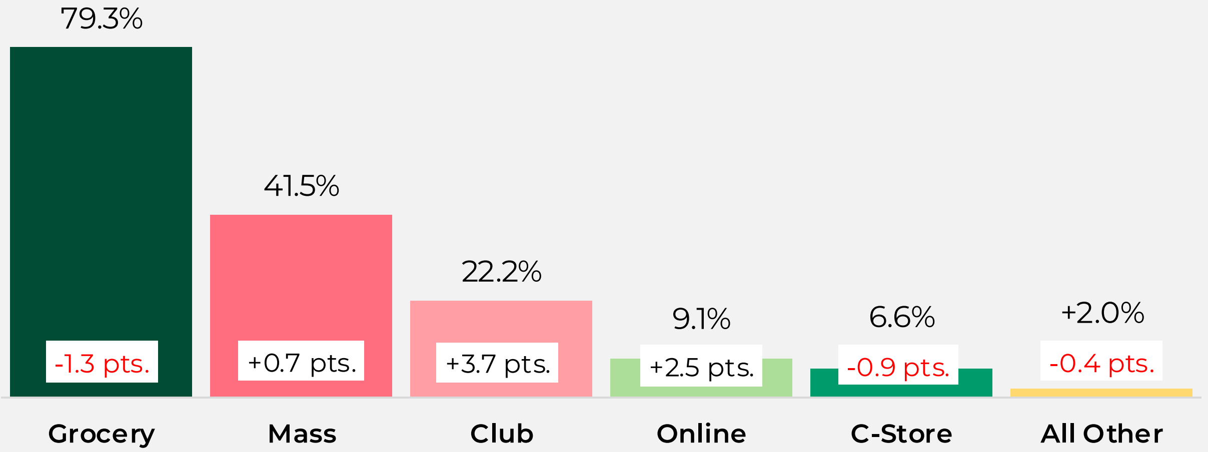
All figures rounded

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Grocery captured 8 in 10 watermelon households and led in repeat purchases. However, the Club and Online channels have attracted more watermelon households since 2021.

Percentage of Watermelon Households Purchasing by Channel

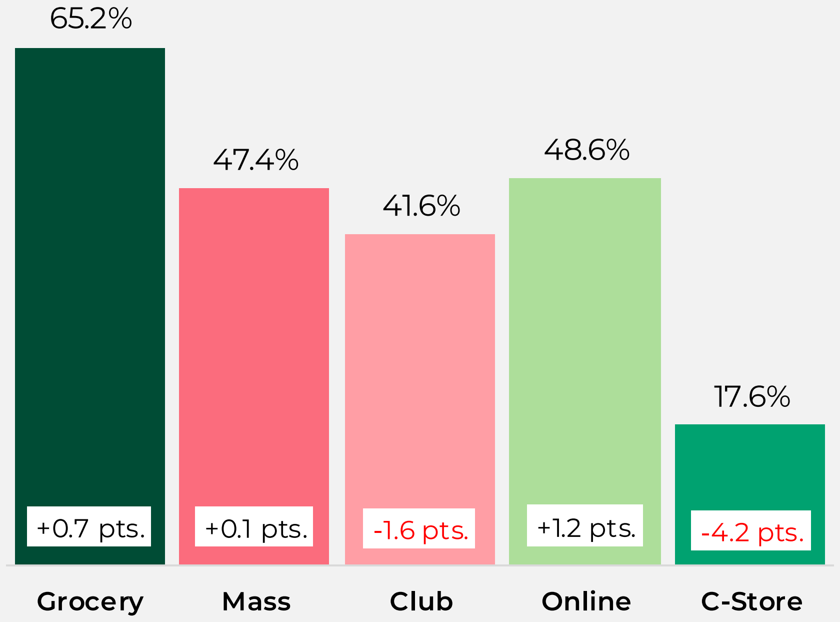
with change vs. 2021



Channel	Total Watermelon Households	Change vs. 2021
Grocery	79.1M	+5.5%
Mass	41.4M	+8.9%
Club	22.1M	+28.4%
Online	9.0M	+46.9%
C-Store	6.6M	-5.7%
All Other	2.0M	-9.0%

Percentage of Repeat Shoppers by Channel*

with change vs. 2021



All figures rounded

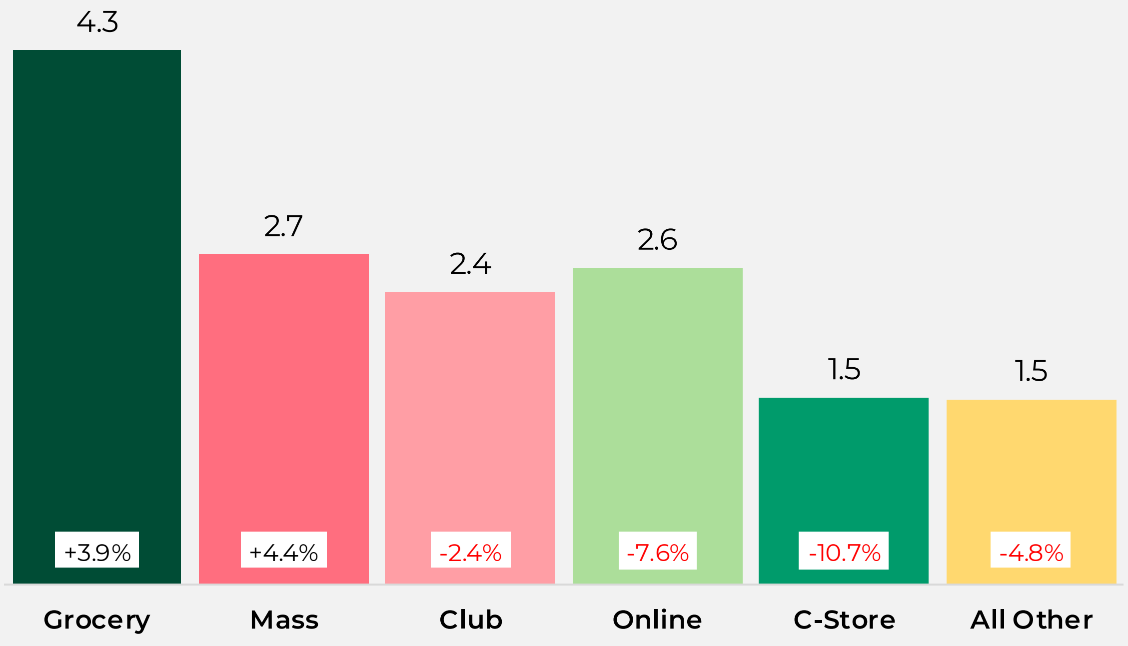
*Percentage of Repeat Shoppers not available for All Other channels

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Watermelon households purchased most often in Grocery, while Club delivered the highest spend per trip.

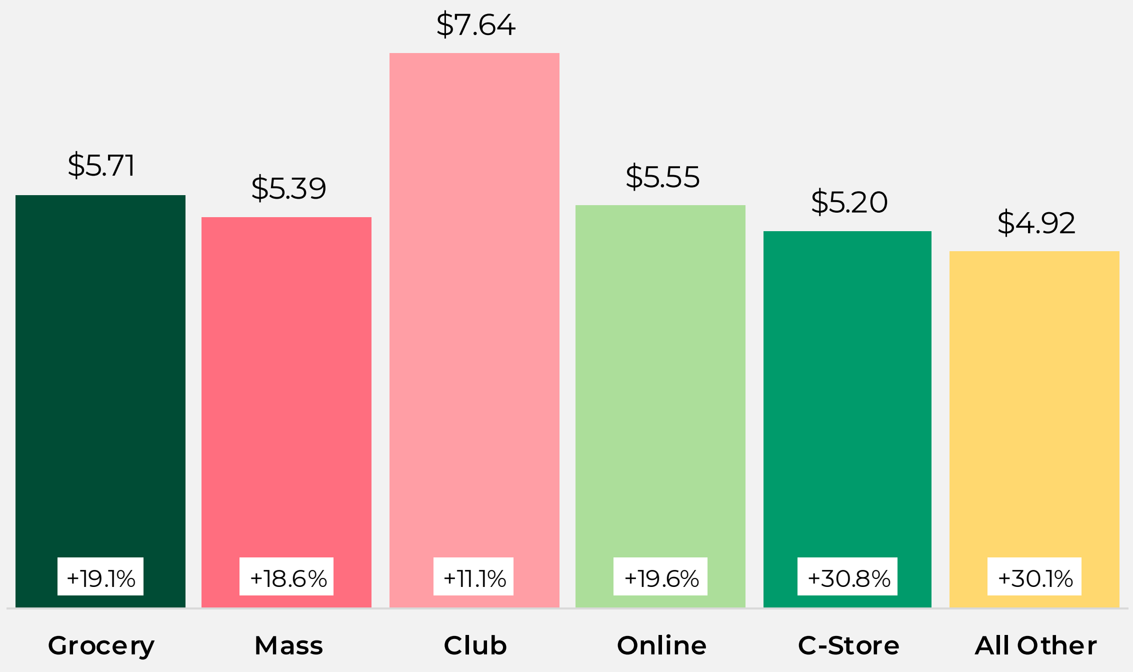
Average Annual Purchase Trips per Household by Channel

with change vs. 2021



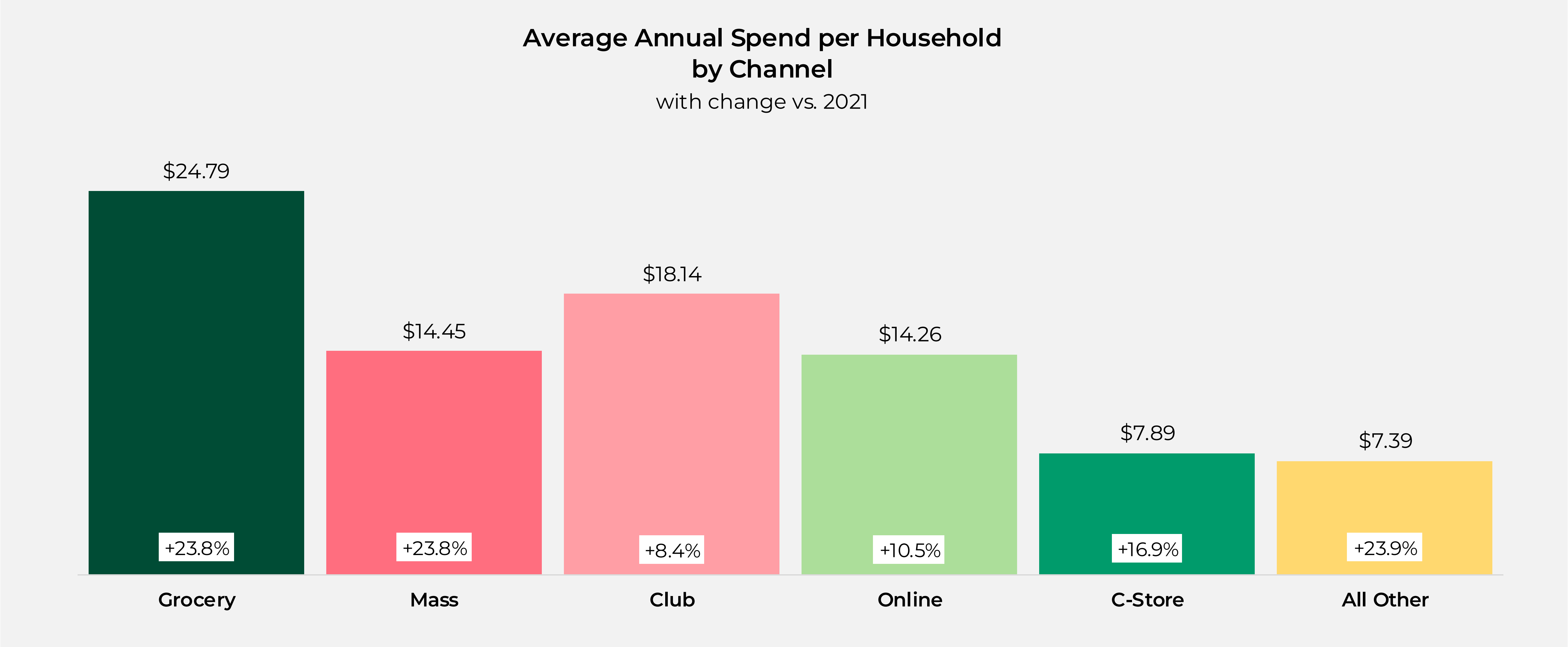
Average Spend per Trip per Household by Channel

with change vs. 2021



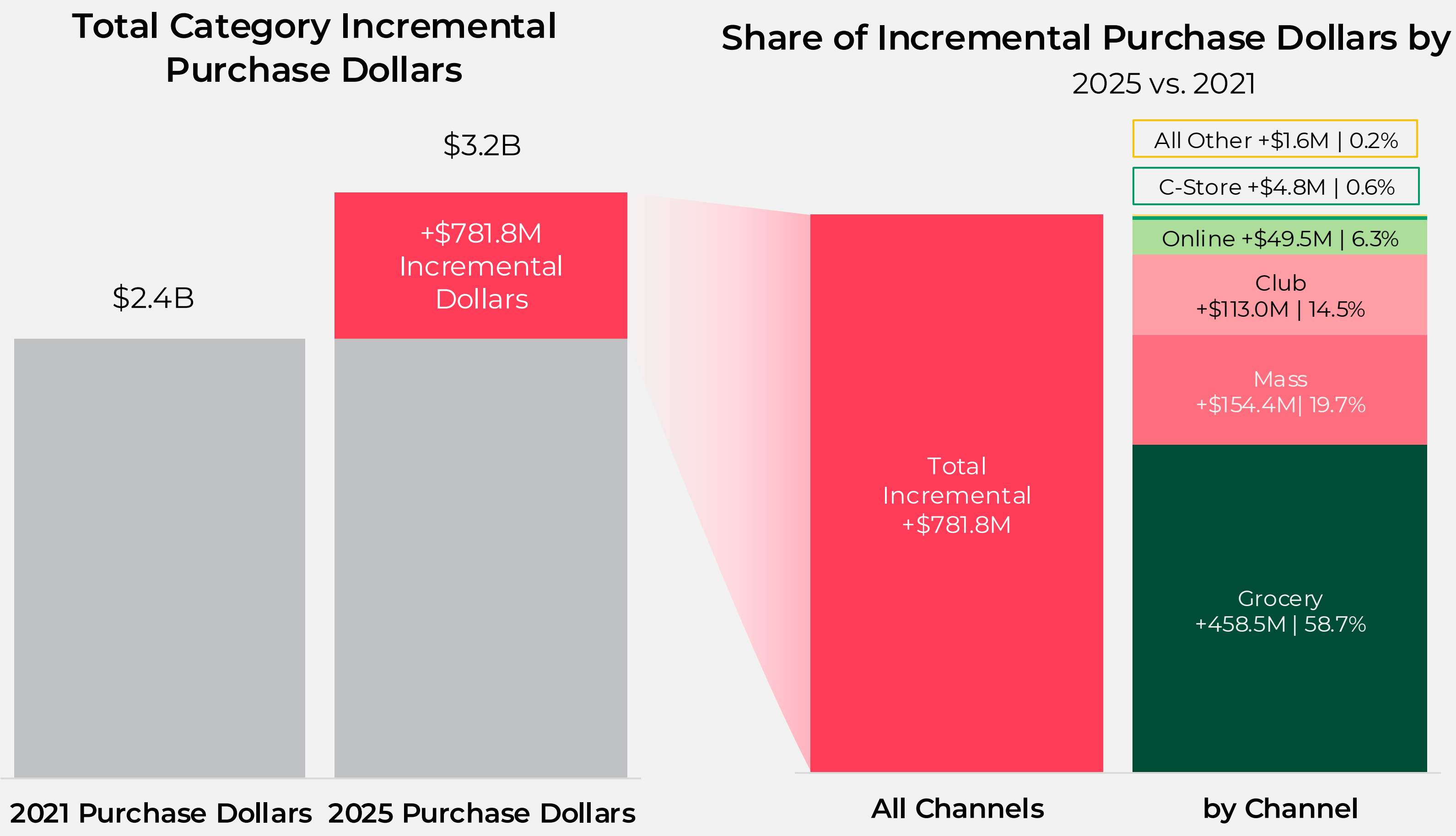
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Grocery had the highest average annual spend per household, followed by Club. All channels grew in annual watermelon spend, with Grocery, Mass, and All Other seeing the highest growth at +24%.



All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

The Grocery channel drove category growth since 2021, accounting for 59% of incremental purchase dollars.



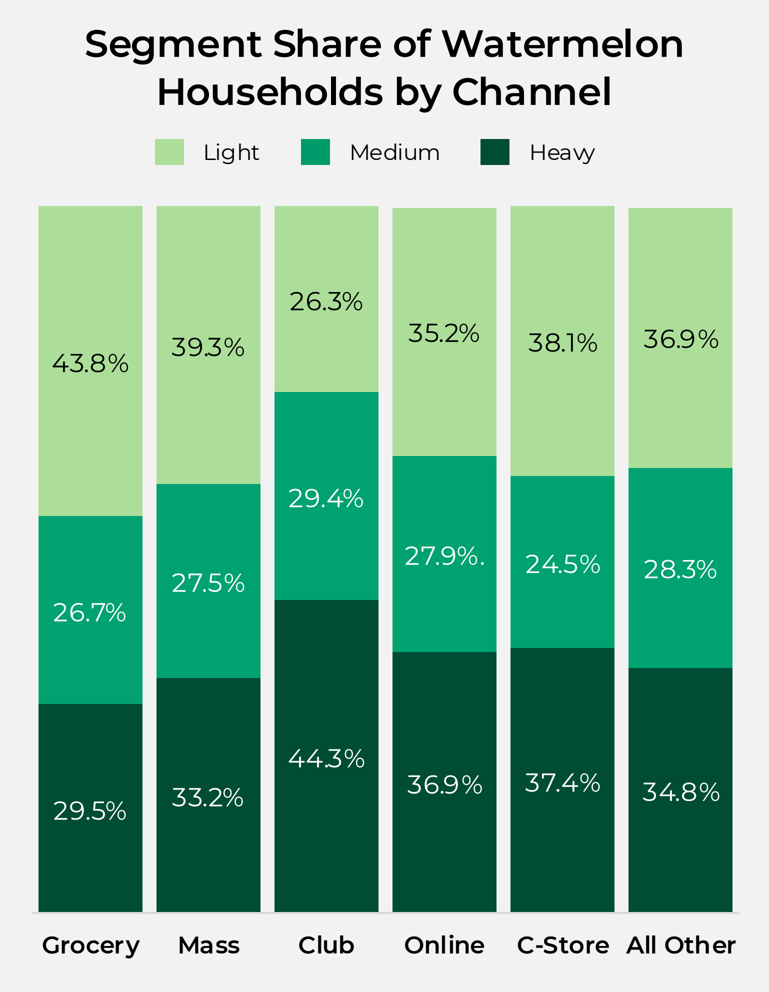
Channel	Total Purchase Dollars	Change vs. 2021
Grocery	$1,959.4M	+30.6%
Mass	$597.8M	+34.8%
Club	$400.8M	+39.3%
Online	$128.8M	+62.4%
C-Store	$51.9M	+10.2%
All Other	$14.5M	+12.7%

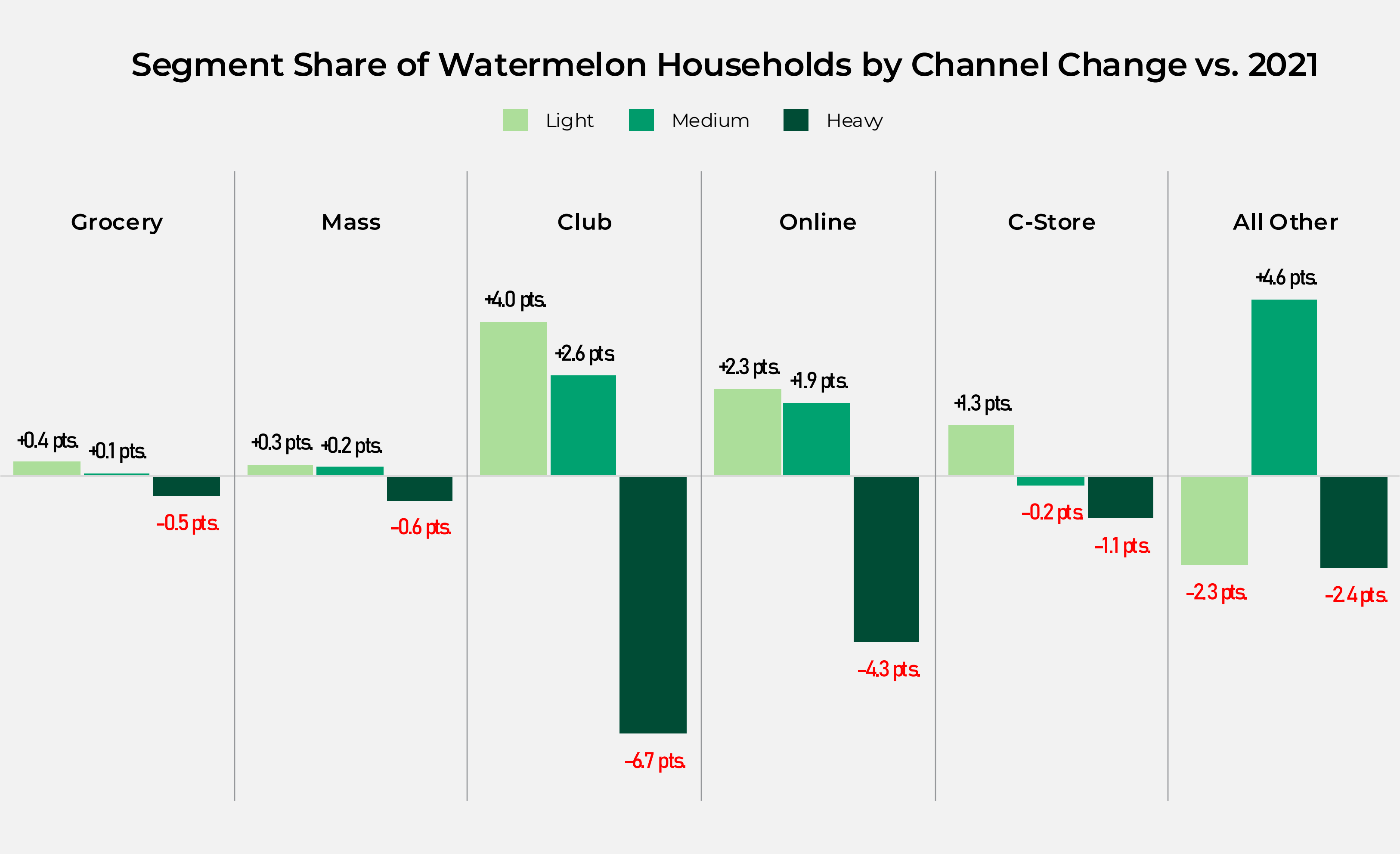
4

WATERMELON ANNUAL PURCHASE TRENDS

BY RETAIL CHANNEL AND SHOPPER SEGMENT

Heavy shoppers held the majority share of watermelon households in the Club and Online channels. However, Heavies lost share across all channels since 2021 to Lights and Mediums.

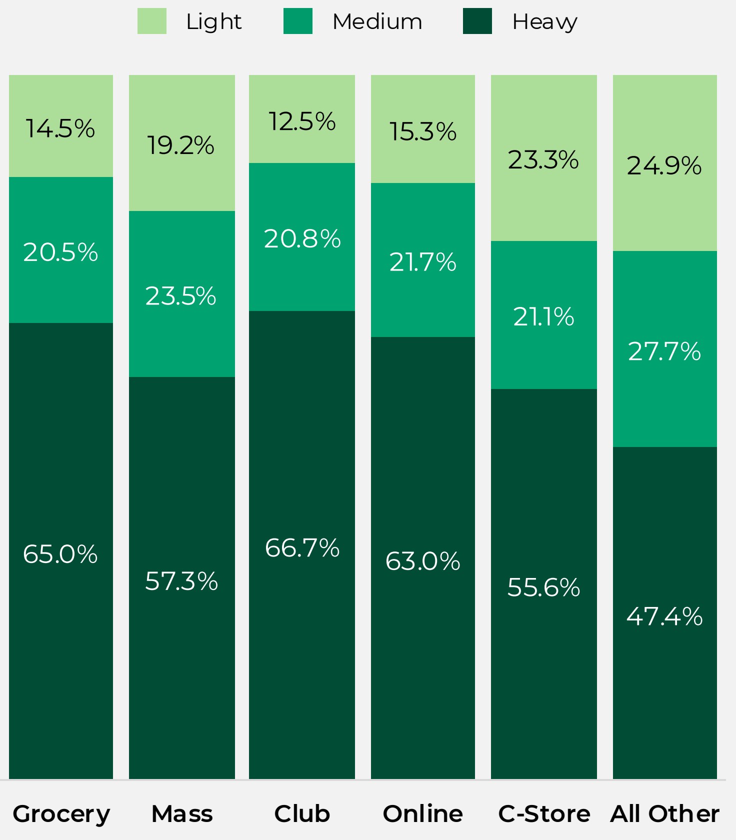




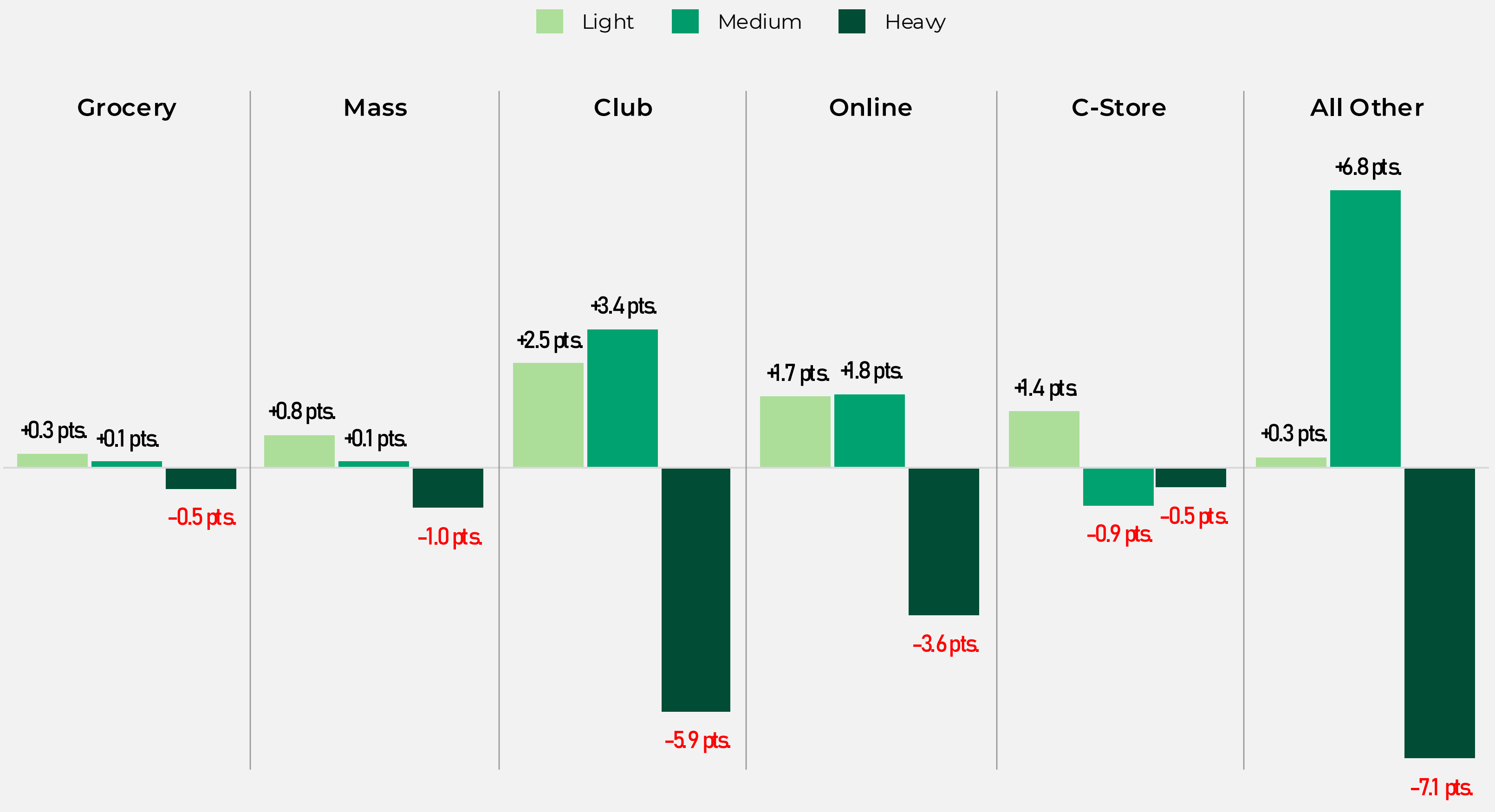
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Heavy shoppers held the largest share of purchase dollars across all channels, peaking at 67% in Club. Their share declined since 2021, with Lights and Mediums gaining, especially in Club and All Other.

Segment Share of Purchase Dollars by Channel



Segment Share of Purchase Dollars by Channel Change vs. 2021

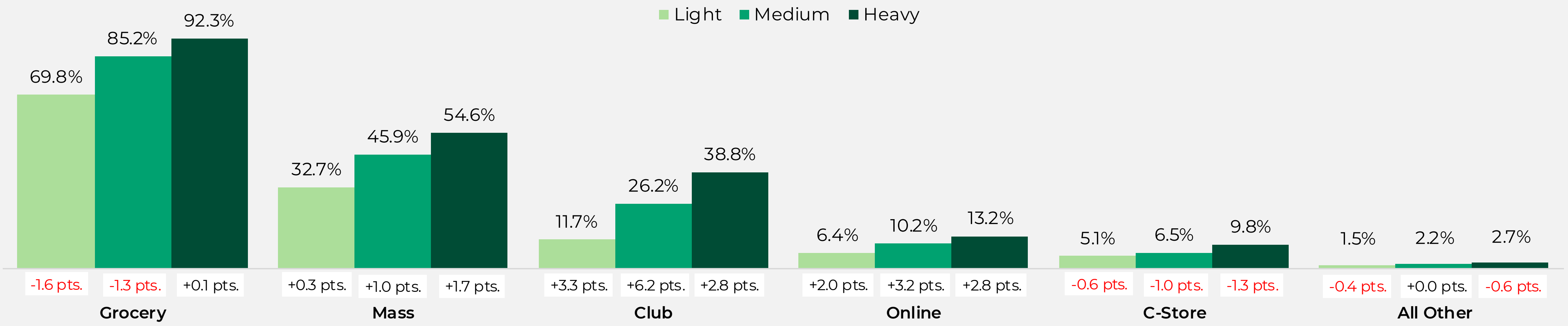


All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Over 92% of Heavy shoppers purchased watermelon in Grocery, similar to 2021. Club and Online channels saw the fastest growth, with 39% of Heavies buying in Club (+3 points) and 13% Online (+3 points).

Percentage of Watermelon Households Purchasing by Segment and Channel

with change vs. 2021

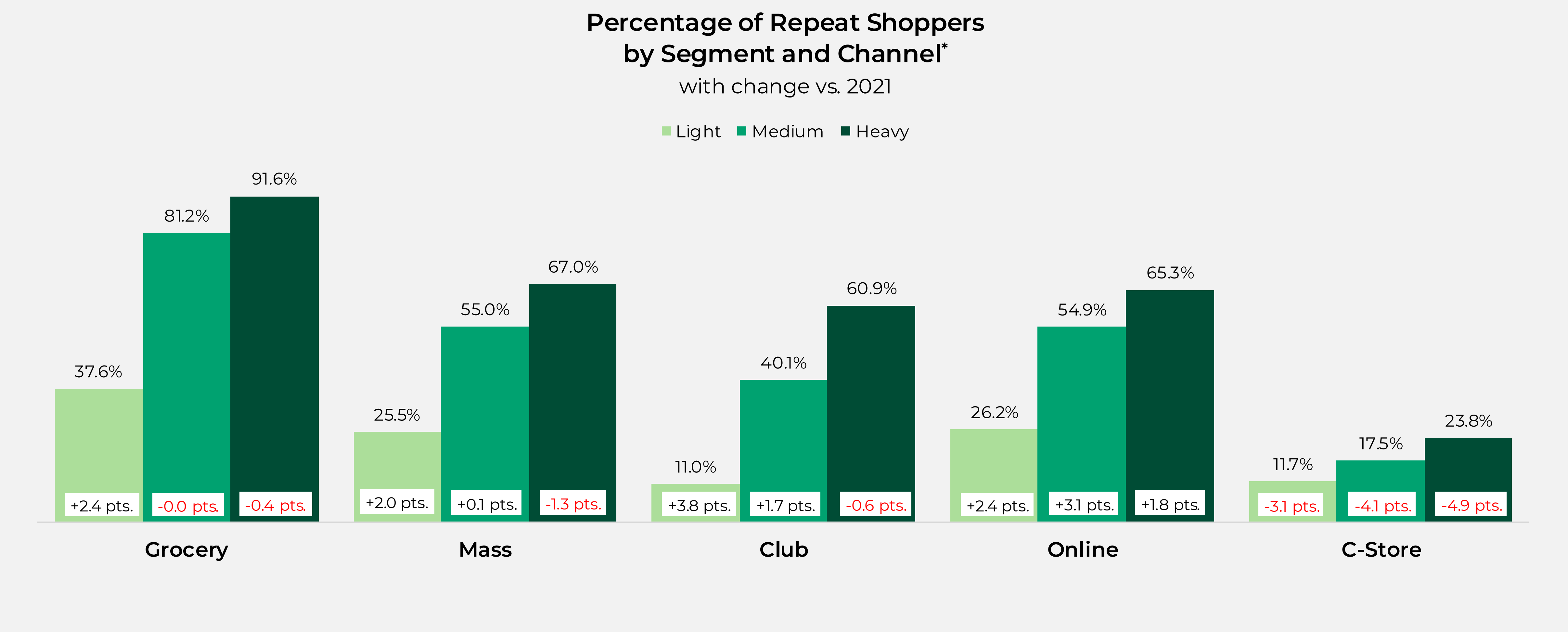


Shopper Segment	Grocery		Mass		Club		Online		C-Store		All Other	
	Total Households	Change vs. 2021	Total Households	Change vs. 2021	Total Households	Change vs. 2021	Total Households	Change vs. 2021	Total Households	Change vs. 2021	Total Households	Change vs. 2021
Light	34.6M	+6.4%	16.2M	+9.8%	5.8M	+51.6%	3.2M	+57.1%	2.5M	-2.2%	0.7M	-14.4%
Medium	21.1M	+5.9%	11.4M	+9.9%	6.5M	+41.0%	2.5M	+57.8%	1.6M	-6.6%	0.6M	+8.6%
Heavy	23.3M	+3.7%	13.7M	+6.9%	9.8M	+11.6%	3.3M	+31.6%	2.5M	-8.4%	0.7M	-14.9%

All figures rounded

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

The Grocery channel had the highest rate of repeat watermelon purchases in 2025. Club and Online showed the largest growth vs. 2021, while C-Store declined across all segments.

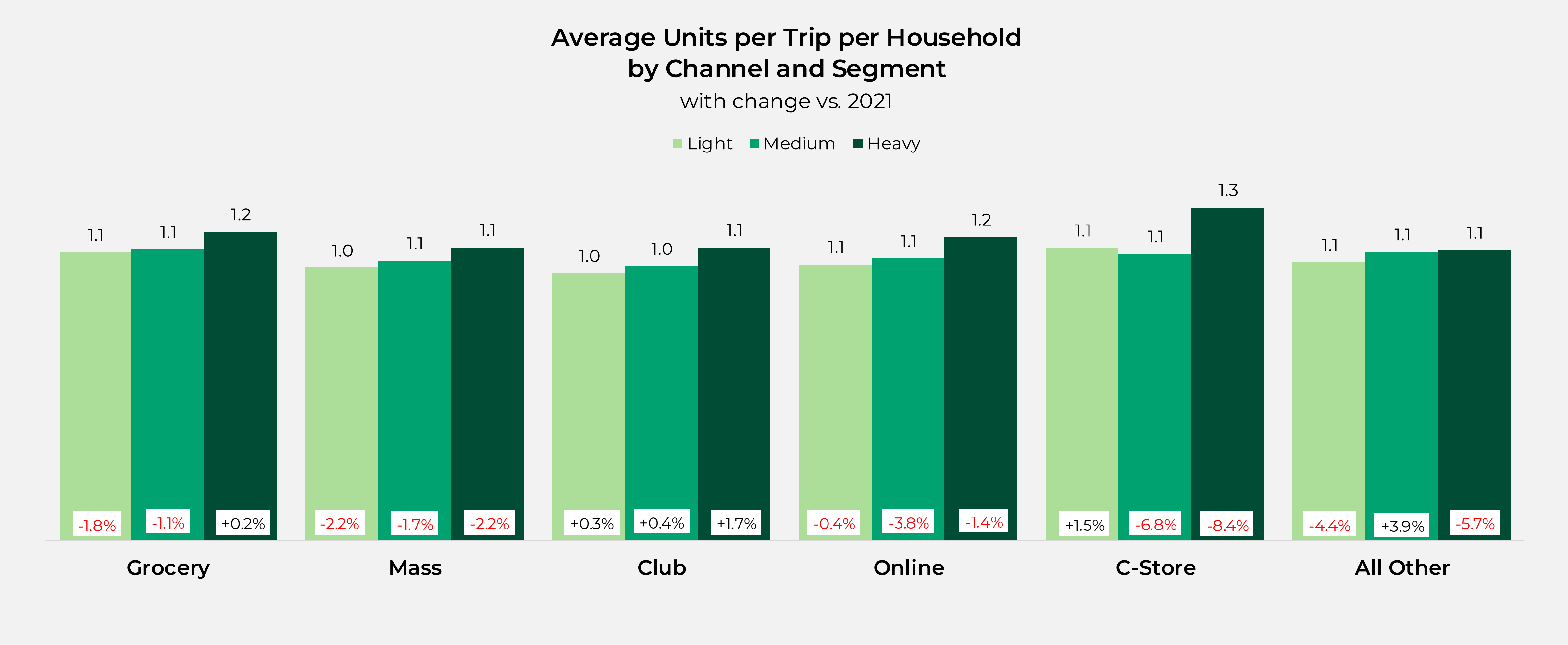


All figures rounded

*Percentage of Repeat Shoppers not available for All Other channels

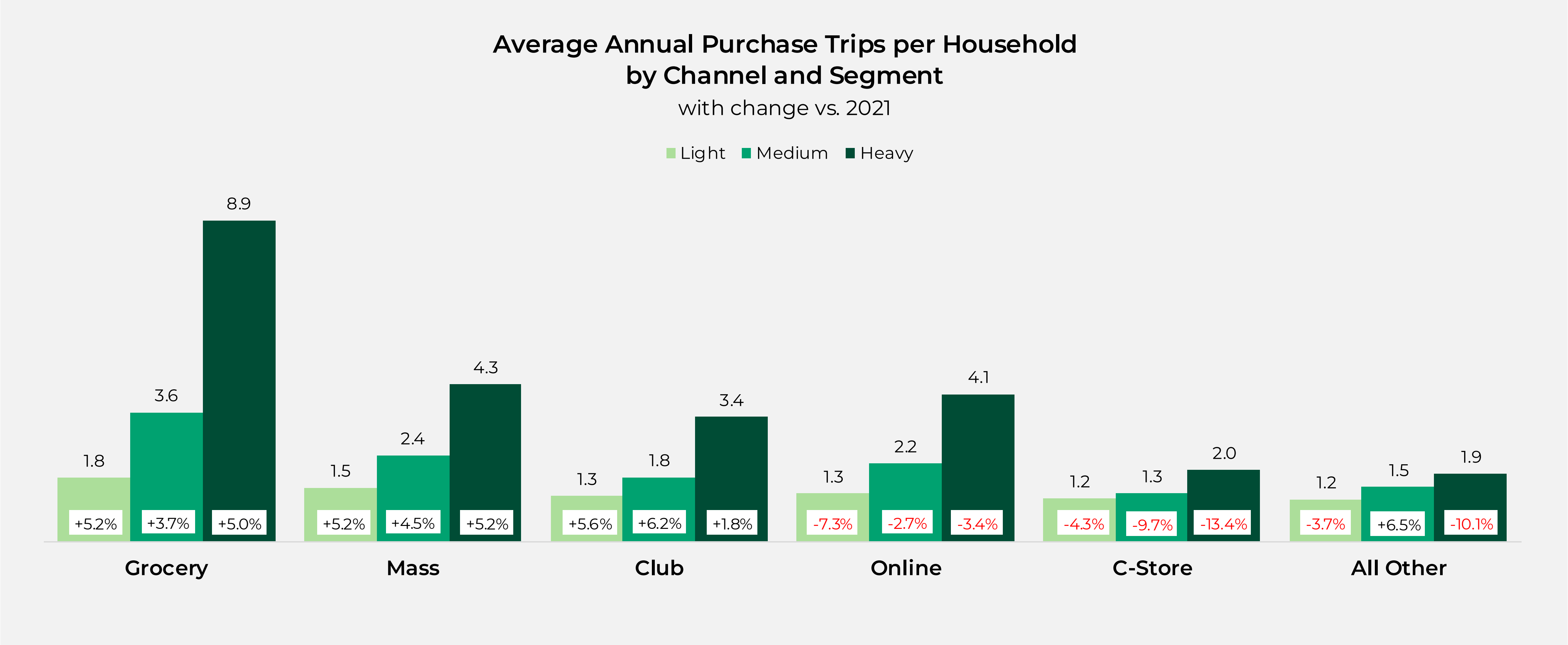
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

C-Store had the highest watermelon purchase rate of any channel at 1.3 units per trip.



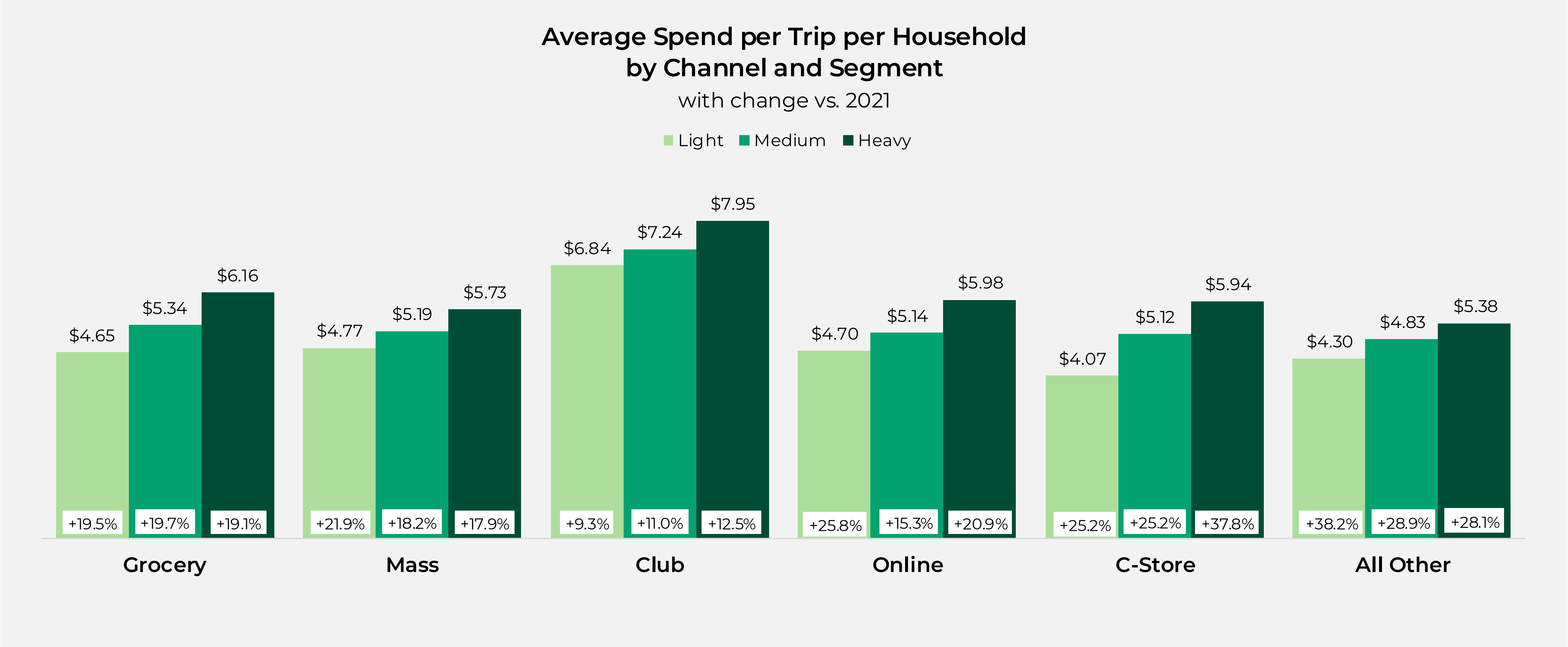
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Heavy shoppers purchased watermelon most often in Grocery, making 9 trips per year on average. Purchase trips per household declined across all segments in the Online and C-Store channels vs. 2021.



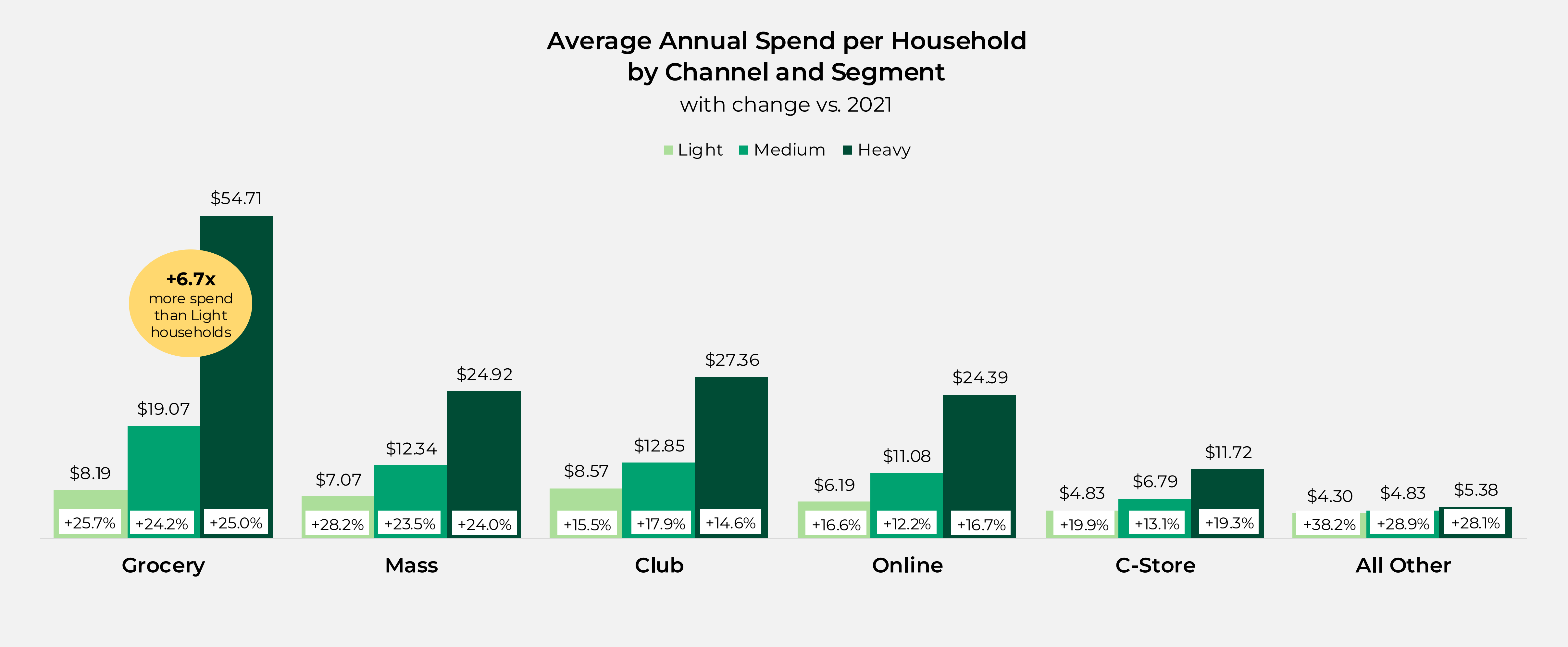
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

The Heavy shopper segment spent the most per watermelon trip across all channels, ranging from an average of $5.38/trip in All Other channels to an average of $7.95/trip in the Club channel.



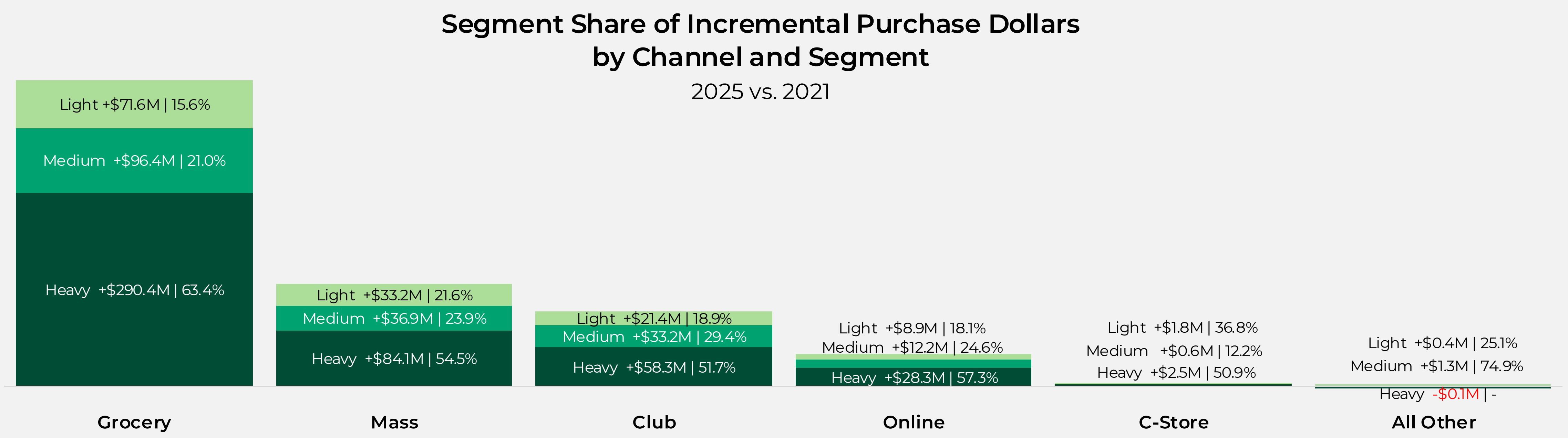
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Heavy shoppers spent more on than other segments in all channels. However, this gap was widest in Grocery where Heavies spent nearly +7 times more on watermelon than Lights.



All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Heavy shoppers drove category growth across all channels except All Other. Their contribution was most significant in the Grocery channel at +$290M in incremental purchases.



Shopper Segment	Grocery		Mass		Club		Online		C-Store		All Other	
	Total Dollars	Change vs. 2021	Total Dollars	Change vs. 2021	Total Dollars	Change vs. 2021	Total Dollars	Change vs. 2021	Total Dollars	Change vs. 2021	Total Dollars	Change vs. 2021
Light	$283.5M	+33.8%	$114.8M	+40.7%	$49.9M	+75.0%	$19.7M	+83.3%	$12.1M	+17.2%	$3.6M	+14.0%
Medium	$402.7M	+31.5%	$140.3M	+35.7%	$83.4M	+66.3%	$27.9M	+77.0%	$11.0M	+5.7%	$4.0M	+49.1%
Heavy	$1,272.9M	+29.6%	$342.6M	+32.6%	$267.5M	+27.9%	$81.1M	+53.6%	$28.8M	+9.3%	$6.9M	-1.9%

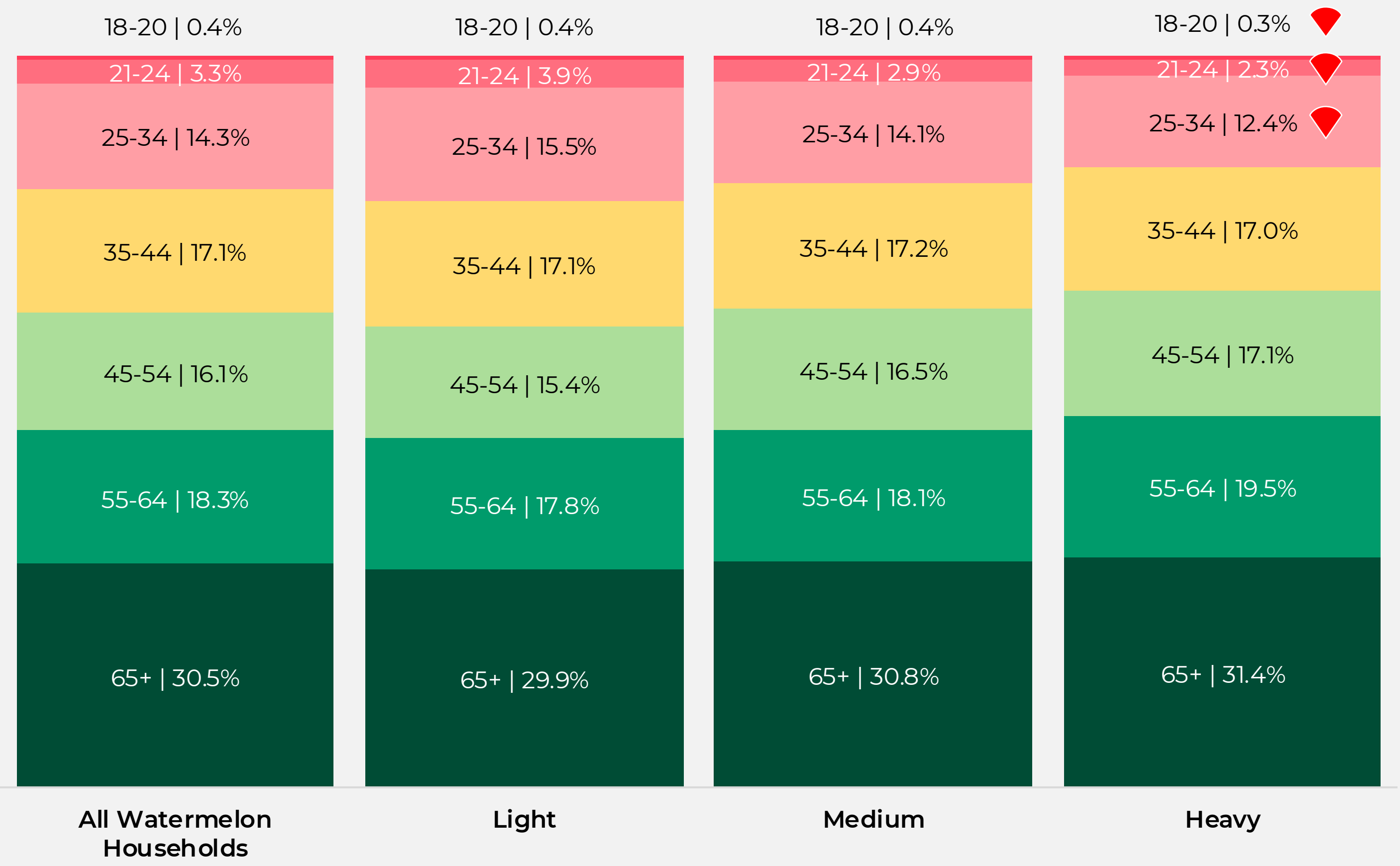
All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

5

WATERMELON SHOPPER SEGMENT DEMOGRAPHICS

Demographics in the watermelon category have shifted since 2021. Younger watermelon households (21-44) and the oldest household group (65+) have gained share, while households 45-64 have lost share.

AGE GROUP — SHARE OF WATERMELON HOUSEHOLDS



Change vs. 2021				
Age Group	Segment			
	All Watermelon Households	Light	Medium	Heavy
18-20	-0.0 pts.	+0.0 pts.	+0.0 pts.	-0.1 pts.
21-24	+0.1 pts.	+0.1 pts.	+0.0 pts.	+0.1 pts.
25-34	+0.1 pts.	+0.3 pts.	-0.3 pts.	+0.0 pts.
35-44	+0.6 pts.	+0.9 pts.	+0.8 pts.	-0.3 pts.
45-54	-0.8 pts.	-1.4 pts.	-0.2 pts.	-0.4 pts.
55-64	-1.6 pts.	-1.6 pts.	-1.4 pts.	-1.8 pts.
65+	+1.7 pts.	+1.7 pts.	+1.0 pts.	+2.4 pts.

High Index ≥ 120

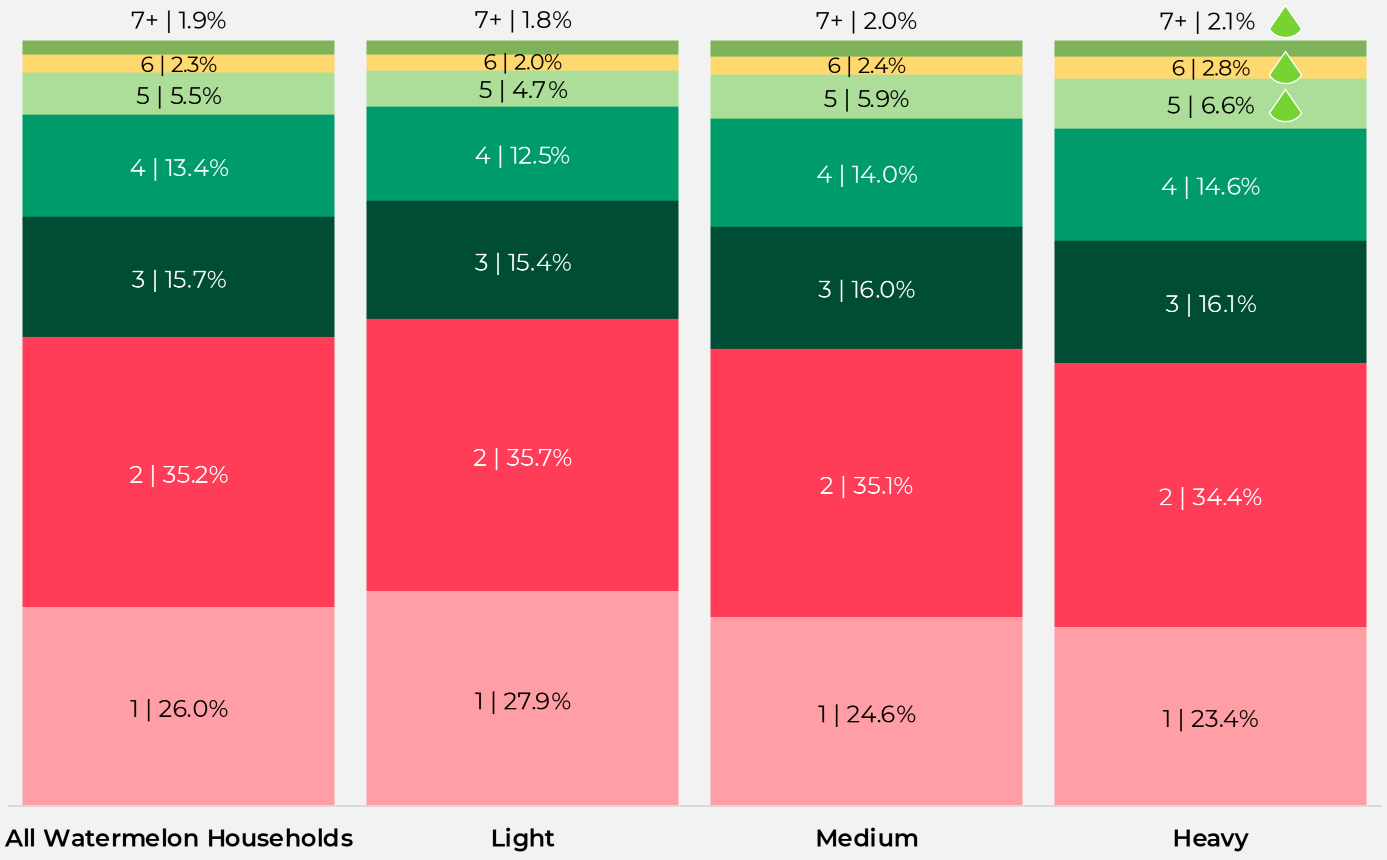
Low Index ≤ 80

All figures rounded

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Most watermelon households live in 1–2 person households, though the Heavy segment are more likely to be in larger households (5+) compared to Lights.

HOUSEHOLD SIZE — SHARE OF WATERMELON HOUSEHOLDS



Change vs. 2021				
Household Size	Segment			
	All Watermelon Households	Light	Medium	Heavy
1	+1.5 pts.	+1.1 pts.	+1.5 pts.	+2.0 pts.
2	-0.3 pts.	-0.2 pts.	-0.4 pts.	-0.5 pts.
3	-0.2 pts.	-0.1 pts.	-0.4 pts.	-0.3 pts.
4	-0.4 pts.	-0.1 pts.	-0.4 pts.	-0.9 pts.
5	-0.1 pts.	-0.4 pts.	+0.1 pts.	+0.1 pts.
6	+0.1 pts.	+0.0 pts.	+0.0 pts.	+0.2 pts.
7+	-0.4 pts.	-0.3 pts.	-0.4 pts.	-0.6 pts.

High Index ≥ 120

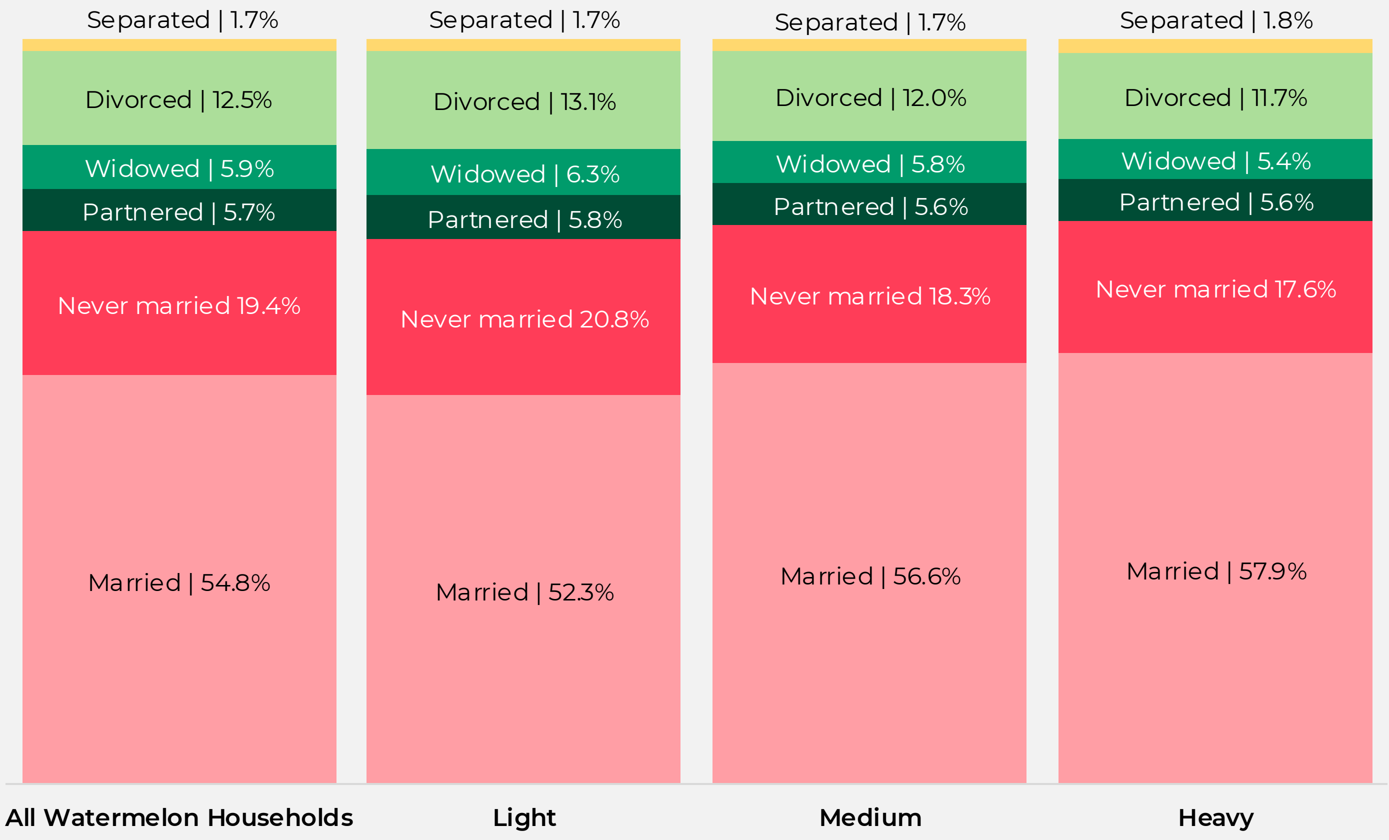
Low Index ≤ 80

All figures rounded

Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Most watermelon households are married, especially among Heavy shoppers. Never-married households grew across all segments, while married households also increased among Lights and Mediums.

MARITAL STATUS — SHARE OF WATERMELON HOUSEHOLDS

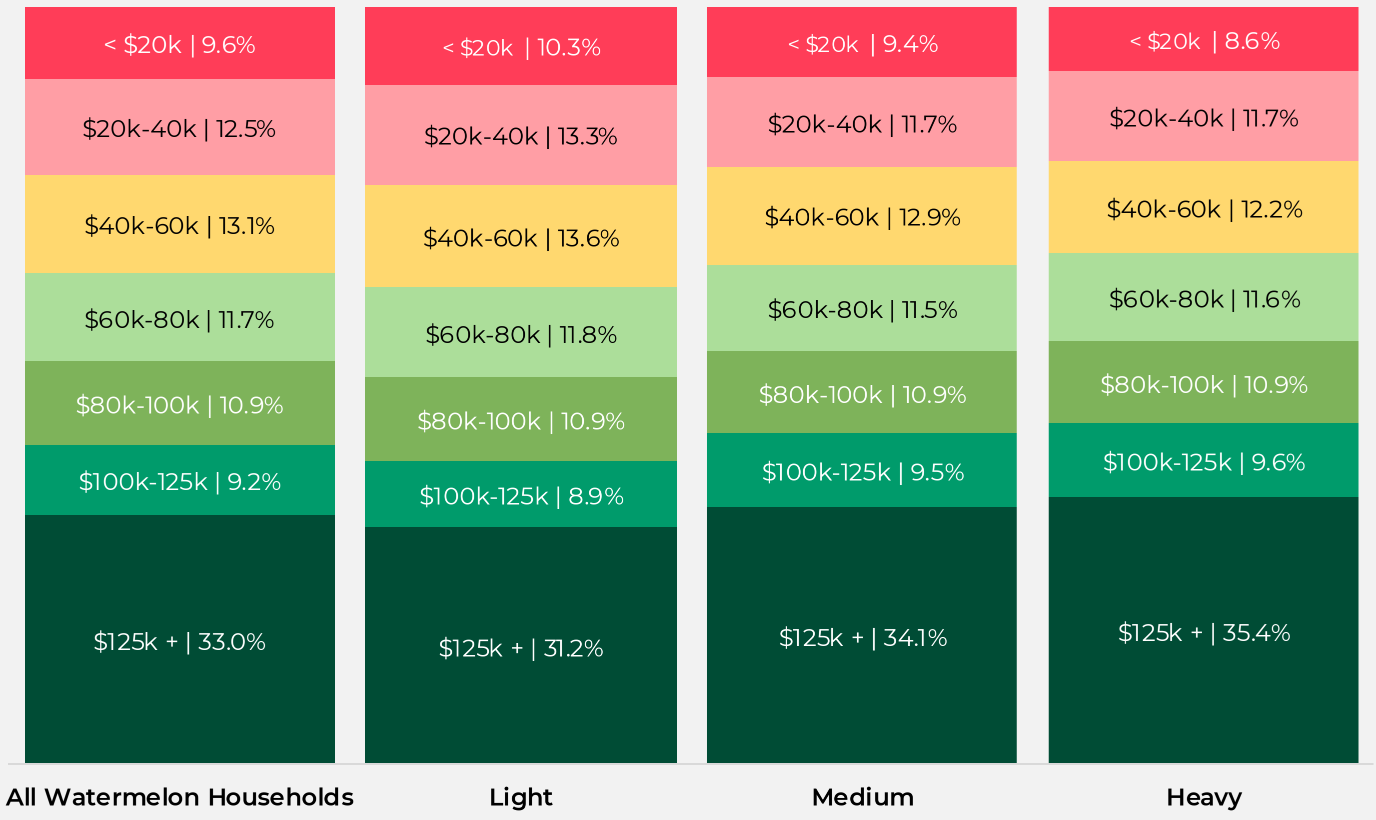


Change vs. 2021				
Marital Status	Segment			
	All Watermelon Households	Light	Medium	Heavy
Married	-0.1 pts.	+0.4 pts.	+0.2 pts.	-1.1 pts.
Never Married	+1.0 pts.	+1.2 pts.	+0.6 pts.	+0.8 pts.
Partnered	-0.4 pts.	-0.5 pts.	-0.2 pts.	-0.4 pts.
Widowed	-0.3 pts.	-0.4 pts.	-0.4 pts.	-0.1 pts.
Divorced	+0.0 pts.	-0.4 pts.	-0.0 pts.	+0.9 pts.
Separated	-0.2 pts.	-0.3 pts.	-0.1 pts.	-0.2 pts.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

High-income households ($125K+) hold the largest share of watermelon households across all segments and also grew significantly vs. 2021, while mid-income and lower-income households declined.

INCOME — SHARE OF WATERMELON HOUSEHOLDS

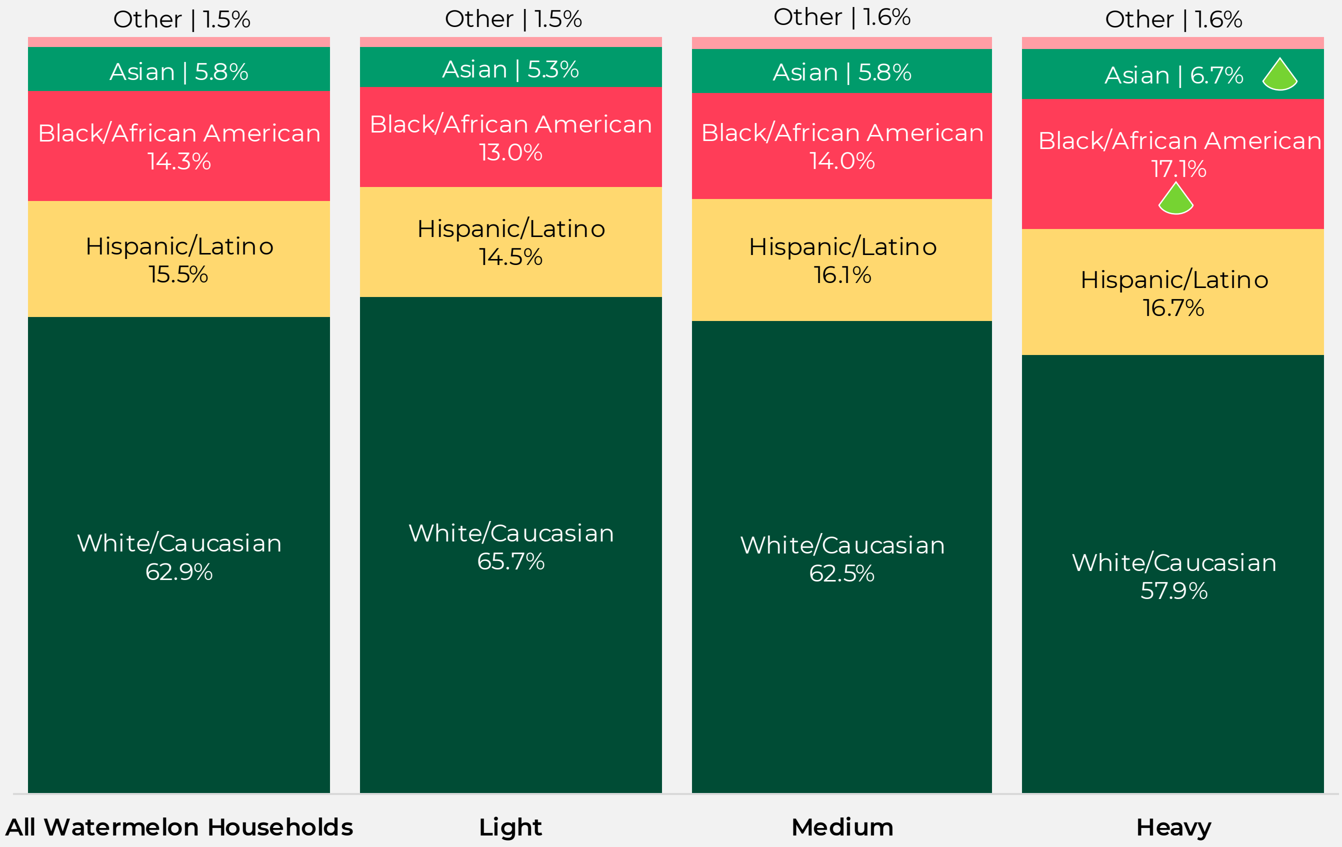


Change vs. 2021				
Income	Segment			
	All Watermelon Households	Light	Medium	Heavy
< $20k	-3.4 pts.	-3.4 pts.	-3.7 pts.	-3.0 pts.
$20k-40k	-2.9 pts.	-3.3 pts.	-3.3 pts.	-1.6 pts.
$40k-60k	-1.1 pts.	-1.2 pts.	-1.3 pts.	-0.6 pts.
$60k-80k	-0.4 pts.	-0.3 pts.	-0.3 pts.	-0.7 pts.
$80k-100k	-0.1 pts.	+0.2 pts.	-0.4 pts.	-0.3 pts.
$100k-125k	+1.4 pts.	+1.6 pts.	+1.3 pts.	+1.0 pts.
$125k +	+6.5 pts.	+6.4 pts.	+7.8 pts.	+5.4 pts.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

While White/Caucasian households make up the majority of watermelon households, declines in this group were offset by growth from Black/African American and Hispanic/Latino households.

ETHNICITY — SHARE OF WATERMELON HOUSEHOLDS



Change vs. 2021				
Ethnicity	Segment			
	All Watermelon Households	Light	Medium	Heavy
Other	+0.1 pts.	+0.1 pts.	+0.1 pts.	+0.0 pts.
Asian	+0.2 pts.	+0.5 pts.	-0.0 pts.	-0.1 pts.
Black/African American	+0.9 pts.	+0.2 pts.	+1.1 pts.	+2.4 pts.
Hispanic/Latino	+0.9 pts.	+0.5 pts.	+1.2 pts.	+1.6 pts.
White/Caucasian	-2.1 pts.	-1.2 pts.	-2.4 pts.	-3.8 pts.

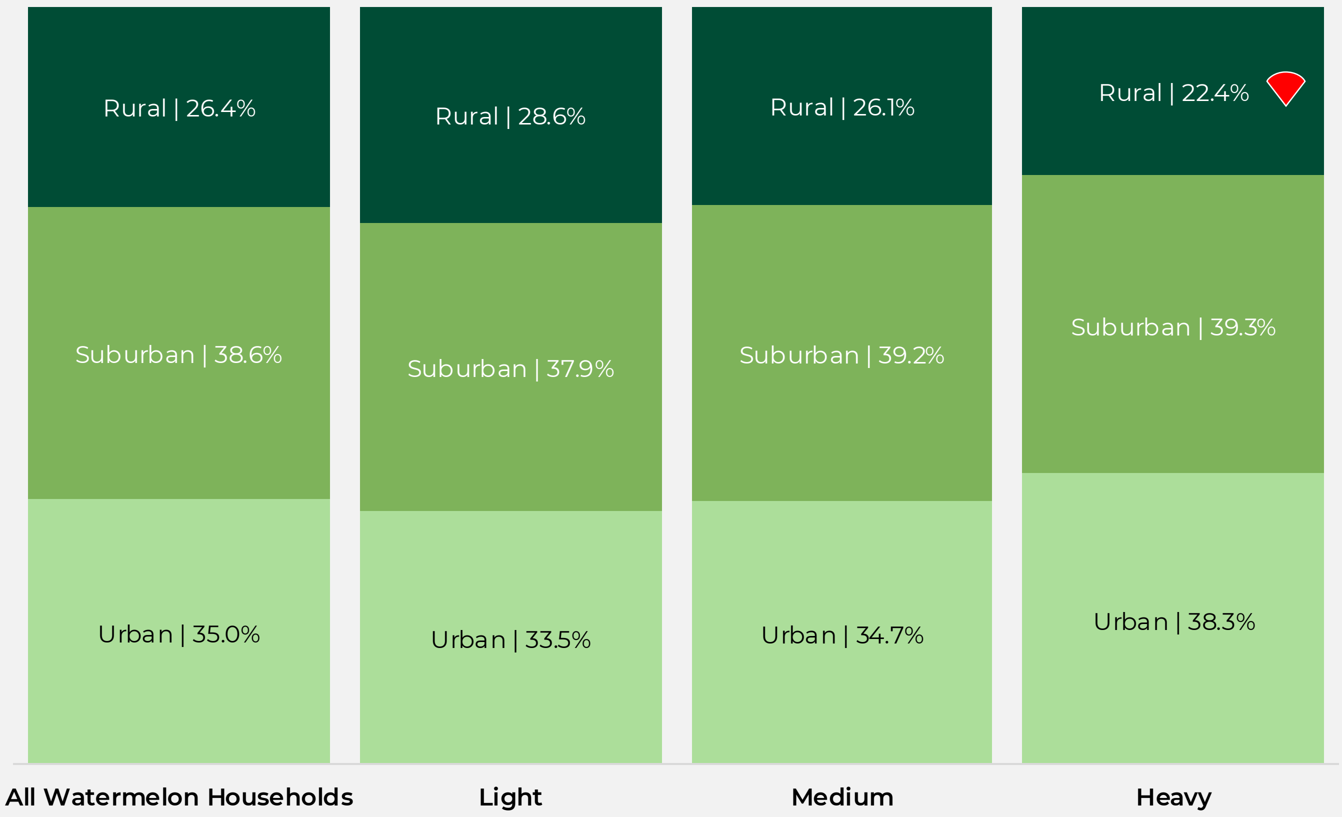
High Index ≥ 120

Low Index ≤ 80

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Most watermelon households live in suburban or urban areas while rural households declined slightly across all segments vs. 2021. Rural Heavy shoppers skewed low in comparison to Lights.

URBANCITY — SHARE OF WATERMELON HOUSEHOLDS



Change vs. 2021				
Urbanicity	Segment			
	All Watermelon Households	Light	Medium	Heavy
Rural	-0.7 pts.	-0.8 pts.	-1.1 pts.	-0.4 pts.
Suburban	+0.7 pts.	+0.7 pts.	+0.9 pts.	+0.5 pts.
Urban	+0.1 pts.	+0.1 pts.	+0.2 pts.	-0.0 pts.

High Index ≥ 120

Low Index ≤ 80

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

6

APPENDIX

Purchase Units and Trips by Shopper Segment

Shopper Segment	Purchase Units		Purchase Trips	
Light	Total	108.0M	Total	100.3M
	Change vs. 2021	+13.3%	Change vs. 2021	+15.4%
	Incremental	+12.6M	Incremental	+13.4M
	Share of Incremental	21.2%	Share of Incremental	23.2%
Medium	Total	133.6M	Total	122.4M
	Change vs. 2021	+13.0%	Change vs. 2021	+14.7%
	Incremental	+15.4M	Incremental	+15.7M
	Share of Incremental	25.7%	Share of Incremental	27.2%
Heavy	Total	370.8M	Total	320.0M
	Change vs. 2021	+9.3%	Change vs. 2021	+9.8%
	Incremental	+31.7M	Incremental	+28.7M
	Share of Incremental	53.1%	Share of Incremental	49.6%
All Watermelon Households	Total	612.4M	Total	542.7M
	Change vs. 2021	+10.8%	Change vs. 2021	+11.9%
	Incremental	+59.8M	Incremental	+57.8M
	Share of Incremental	-	Share of Incremental	-

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Purchase Units and Trips by Retail Channel

Channel	Purchase Units		Purchase Trips	
Grocery	Total	393.8M	Total	343.2M
	Change vs. 2021	+9.1%	Change vs. 2021	+9.6%
	Incremental	+33.0M	Incremental	+30.1M
	Share of Positive Incremental	51.9%	Share of Positive Incremental	50.0%
Mass	Total	120.6M	Total	110.9M
	Change vs. 2021	+11.3%	Change vs. 2021	+13.7%
	Incremental	+12.2M	Incremental	+13.4M
	Share of Positive Incremental	19.2%	Share of Positive Incremental	22.2%
Club	Total	57.0M	Total	52.4M
	Change vs. 2021	+26.4%	Change vs. 2021	+25.4%
	Incremental	+11.9M	Incremental	+10.6M
	Share of Positive Incremental	18.8%	Share of Positive Incremental	17.6%
Online	Total	26.0M	Total	23.2M
	Change vs. 2021	+33.0%	Change vs. 2021	+35.8%
	Incremental	+6.4M	Incremental	+6.1M
	Share of Positive Incremental	10.1%	Share of Positive Incremental	10.2%
C-Store	Total	11.8M	Total	10.0M
	Change vs. 2021	-20.9%	Change vs. 2021	-15.7%
	Incremental	-3.1M	Incremental	-1.9M
	Share of Positive Incremental	-	Share of Positive Incremental	-
All Other	Total	3.2M	Total	3.0M
	Change vs. 2021	-16.3%	Change vs. 2021	-13.4%
	Incremental	-0.6M	Incremental	-0.5M
	Share of Positive Incremental	-	Share of Positive Incremental	-

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Share of Purchase Units and Trips by Retail Channel and Segment

Channel	Purchase Units	Shopper Segment		
		Light	Medium	Heavy
Grocery	Share	17.0	21.2%	61.8%
	Change vs. 2021	+0.1 pts.	-0.1 pts.	-0.0 pts.
Mass	Share	20.7%	23.9%	55.4%
	Change vs. 2021	+0.3 pts.	+0.3 pts.	-0.7 pts.
Club	Share	13.0%	21.1%	65.9%
	Change vs. 2021	+2.8 pts.	+3.4 pts.	-6.1 pts.
Online	Share	17.0%	22.5%	60.5%
	Change vs. 2021	+1.4 pts.	+2.2 pts.	-3.7 pts.
C-Store	Share	28.1%	19.8%	52.1%
	Change vs. 2021	+4.7 pts.	-0.1 pts.	-4.6 pts.
All Other	Share	27.6%	28.5%	43.9%
	Change vs. 2021	-1.7 pts.	+8.6 pts.	-7.0 pts.

Channel	Purchase Trips	Shopper Segment		
		Light	Medium	Heavy
Grocery	Share	17.8%	22.0%	60.2%
	Change vs. 2021	+0.4 pts.	+0.0 pts.	-0.4 pts.
Mass	Share	21.7%	24.4%	53.9%
	Change vs. 2021	+0.3 pts.	+0.2 pts.	-0.6 pts.
Club	Share	13.9%	22.0%	64.1%
	Change vs. 2021	+3.0 pts.	+3.6 pts.	-6.6 pts.
Online	Share	18.0%	23.5%	58.5%
	Change vs. 2021	+1.2 pts.	+2.7 pts.	-4.0 pts.
C-Store	Share	29.8%	21.5%	48.7%
	Change vs. 2021	+3.0 pts.	+0.0 pts.	-3.0 pts.
All Other	Share	28.5%	28.2%	43.3%
	Change vs. 2021	-1.4 pts.	+7.1 pts.	-5.7 pts.

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

Purchase Units and Trips by Retail Channel and Segment

Channel	Purchase Units	Shopper Segment		
		Light	Medium	Heavy
Grocery	Total	66.9M	83.6M	243.2M
	Change vs. 2021	+9.9%	+8.6%	9.1%
	Incremental	+6.0M	+6.7M	+20.3M
	Share of Positive Incremental	18.3%	20.2%	61.5%
Mass	Total	25.0M	28.8M	66.8M
	Change vs. 2021	+13.0%	+12.8%	+10.0%
	Incremental	+2.9M	+3.3M	+6.1M
	Share of Positive Incremental	23.5%	26.9%	49.6%
Club	Total	7.4M	12.0M	37.6M
	Change vs. 2021	+60.5%	+50.3%	+15.6%
	Incremental	+2.8M	+4.0M	+5.1M
	Share of Positive Incremental	23.5%	33.9%	42.6%
Online	Total	4.4M	5.8M	15.7M
	Change vs. 2021	+45.2%	+47.7%	+25.4%
	Incremental	+1.4M	+1.9M	+3.2M
	Share of Positive Incremental	21.3%	29.3%	49.4%
C-Store	Total	3.3M	2.3M	6.2M
	Change vs. 2021	-5.0%	-21.3%	-27.3%
	Incremental	-0.2M	-0.6M	-2.3M
	Share of Positive Incremental	-	-	-
All Other	Total	0.9M	0.9M	1.4M
	Change vs. 2021	-21.2%	+20.1%	-27.8%
	Incremental	-0.2M	+0.2M	-0.5M
	Share of Positive Incremental	-	100%	-

Channel	Purchase Trips	Shopper Segment		
		Light	Medium	Heavy
Grocery	Total	60.9M	75.4M	206.8M
	Change vs. 2021	+11.9%	+9.8%	+8.8%
	Incremental	+6.5M	+6.8M	+16.8M
	Share of Positive Incremental	21.6%	22.5%	55.9%
Mass	Total	24.1M	27.0M	59.8M
	Change vs. 2021	+15.5%	+14.8%	+12.4%
	Incremental	+3.2M	+3.5M	+6.6M
	Share of Positive Incremental	24.2%	26.1%	49.7%
Club	Total	7.3M	11.5M	33.6M
	Change vs. 2021	+60.1%	+49.7%	+13.7%
	Incremental	+2.7M	+3.8M	+4.0M
	Share of Positive Incremental	25.8%	36.1%	38.1%
Online	Total	4.2M	5.4M	13.6M
	Change vs. 2021	+45.7%	+53.6%	+27.1%
	Incremental	+1.3M	+1.9M	+2.9M
	Share of Positive Incremental	21.5%	31.1%	47.4%
C-Store	Total	3.0M	2.1M	4.9M
	Change vs. 2021	-6.4%	-15.6%	-20.6%
	Incremental	-0.2M	-0.4M	-1.3M
	Share of Positive Incremental	-	-	-
All Other	Total	0.8M	0.8M	1.3M
	Change vs. 2021	-17.5%	+15.7%	-23.5%
	Incremental	-0.2M	+0.1M	-0.4M
	Share of Positive Incremental	-	100%	-

All figures rounded
Source: Numerator Insights, 52 weeks ending 05-31-2025 vs. 52 weeks ending 05-31-2021

National Watermelon Promotion Board

Thank You!

FUSION
Clear Direction For Your Business™