National Watermelon Promotion Board

MARKETING GUIDE

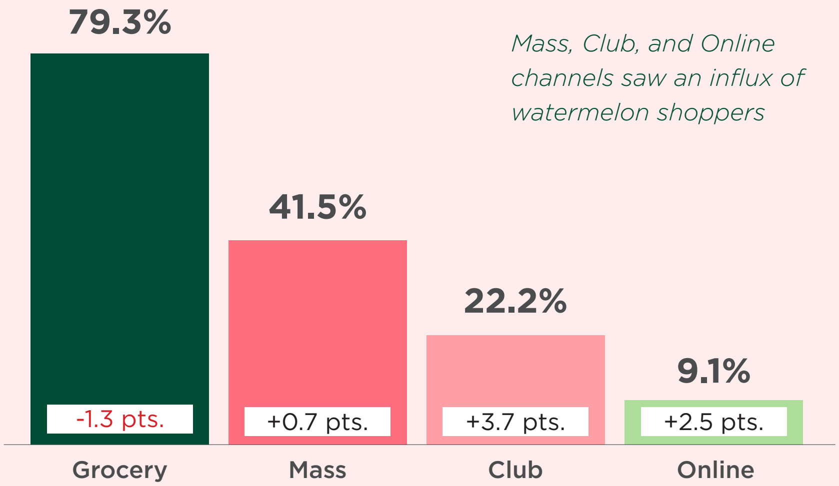
OMNI-CHANNEL STRATEGIES FOR WATERMELON CATEGORY GROWTH

OCTOBER 2025

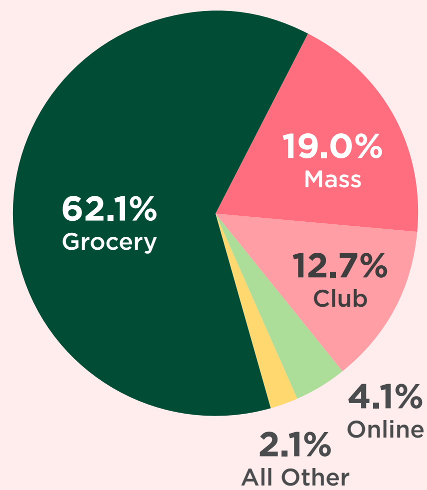
Watermelon Is Ripe for Growth Across Retail Channels

Cross-channel purchasing helped drive growth in the Mass, Club, and Online channels without cannibalizing purchases in Grocery, which remains the anchor for the watermelon category and the top growth driver since 2021.

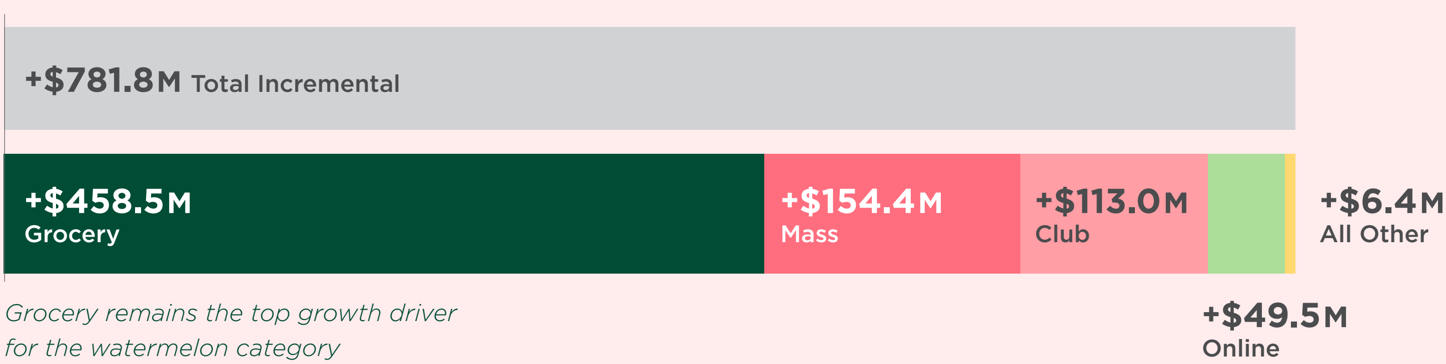
Share of Watermelon Households by Channel With Change vs. 2021



Total Purchase Dollars by Channel 2025



Share of Incremental Purchase Dollars by Channel 2025 vs. 2021



Grocery remains the top growth driver for the watermelon category

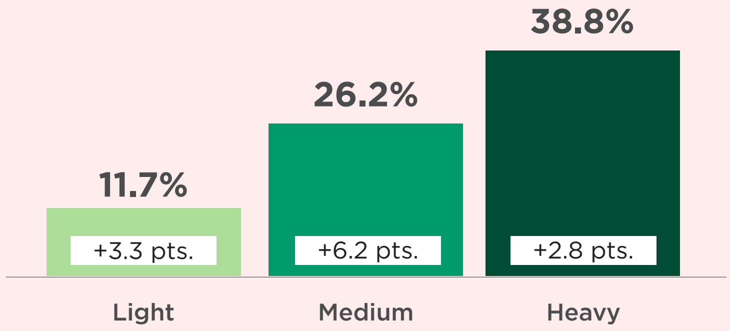
With momentum building, an omni-channel marketing approach could help strengthen watermelon category performance. In Grocery, focus on tactics that encourage watermelon shoppers to purchase more frequently. In Mass, Club, and Online, focus on increasing momentum of cross-channel purchasing behavior by attracting more shoppers to these channels.

Source: NWPB 2025 Omni-Channel Strategies for Watermelon Category Growth
All figures rounded Study Development: Fusion

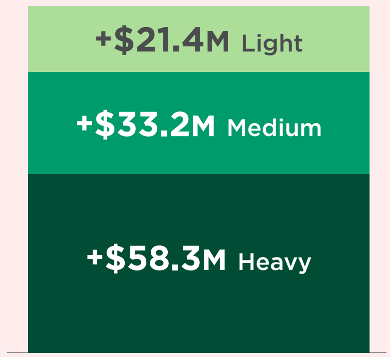
Club's Bulk-Focus Presents a Unique Opportunity

The Club channel gained watermelon households across all shopper segments since 2021. Heavy shoppers drove incremental purchases at Club retailers. However, Club's bulk-oriented nature leads Heavy households to shop less frequently than they do in other channels.

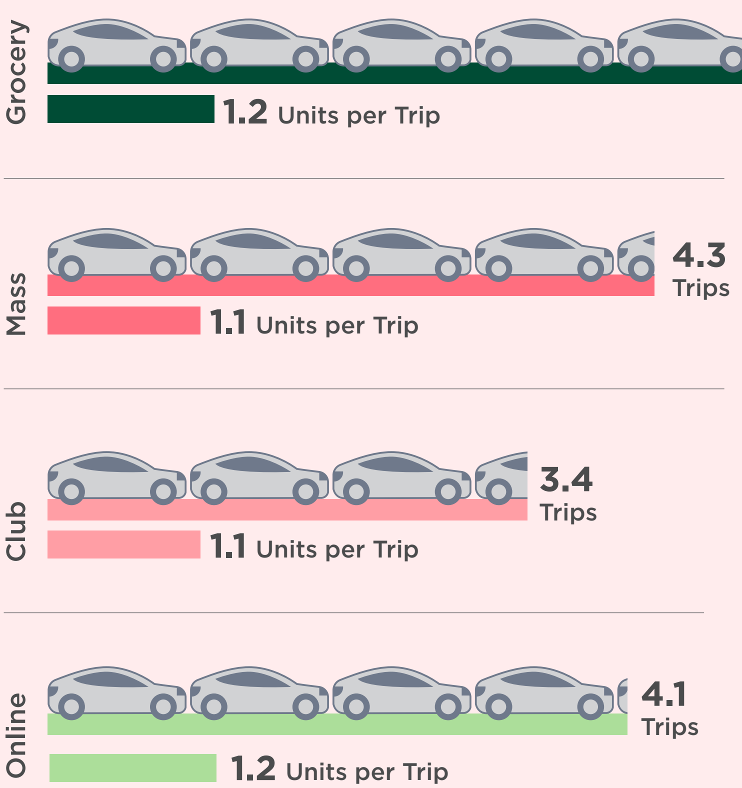
Share of Shopper Segment — Club Channel With Change vs. 2021



Incremental Purchases by Segment — Club Channel 2025 vs. 2021



Heavy Household Average Annual Purchase Trips by Channel With Units per Trip



Unlike other categories, whole watermelon may not gain an advantage in units per trip, which could limit the Club channel's bulk shopping potential.

Explore packaging configurations tailored to Club's bulk format shopping trips to boost spend per trip among Heavy shoppers and elevate watermelon's role as a Club purchase. Strategic collaboration with Club retailers could help further showcase watermelon's versatility and drive incremental, repeat purchases.

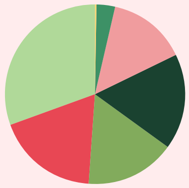
Source: NWPB 2025 Omni-Channel Strategies for Watermelon Category Growth
All figures rounded Study Development: Fusion

Watermelon Shopper Demographics Have Shifted Since 2021

Demographic changes reveal the importance of expanding messaging to inspire engagement among emerging groups while targeting core watermelon shoppers remains essential.

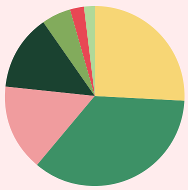
Visit Watermelon.org for more retail and consumer research including channel and demographic insights. These additional findings highlight opportunities to increase growth within the watermelon category.

Age Group



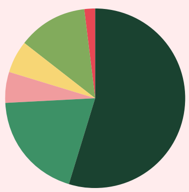
Age	Household Share	vs. 2021
18–20	0.4%	-0.0 pts.
21–24	3.3%	+0.1 pts.
25–34	14.3%	+0.1 pts.
35–44	17.1%	+0.6 pts.
45–54	16.1%	-0.8 pts.
55–64	18.3%	-1.6 pts.
65+	30.5%	+1.7 pts.

Household Size



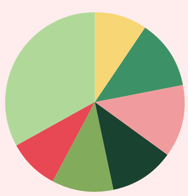
Size	Household Share	vs. 2021
1	26.0%	+1.5 pts.
2	35.2%	-0.3 pts.
3	15.7%	-0.2 pts.
4	13.4%	-0.4 pts.
5	5.5%	-0.1 pts.
6	2.3%	+0.1 pts.
7+	1.9%	-0.4 pts.

Marital Status



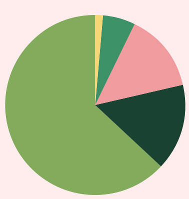
Status	Household Share	vs. 2021
Married	54.8%	-0.1 pts.
Never Married	19.4%	+1.0 pts.
Living with Partner	5.7%	-0.4 pts.
Widower	5.9%	-0.3 pts.
Divorced	12.5%	+0.0 pts.
Separated	1.7%	-0.2 pts.

Household Income



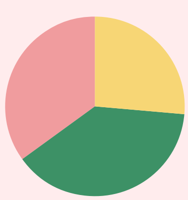
Income	Household Share	vs. 2021
< $20k	9.6%	-3.4 pts.
$20k–40k	12.5%	-2.9 pts.
$40k–60k	13.1%	-1.1 pts.
$60k–80k	11.7%	-0.4 pts.
$80k–100k	10.9%	-0.1 pts.
$100k–125k	9.2%	+1.4 pts.
$125k+	33.0%	+6.5 pts.

Ethnicity



Ethnicity	Household Share	vs. 2021
Other	1.5%	+0.1 pts.
Asian	5.8%	+0.2 pts.
Black/African American	14.3%	+0.9 pts.
Hispanic/Latino	15.5%	+0.9 pts.
White/Caucasian	62.9%	-2.1 pts.

Urbanicity



Urbanicity	Household Share	vs. 2021
Rural	26.4%	-0.7 pts.
Suburban	38.6%	+0.7 pts.
Urban	35.0%	+0.1 pts.

Source: NWPB 2025 Omni-Channel Strategies for Watermelon Category Growth
All figures rounded Study Development: Fusion