



Retail Scan Data

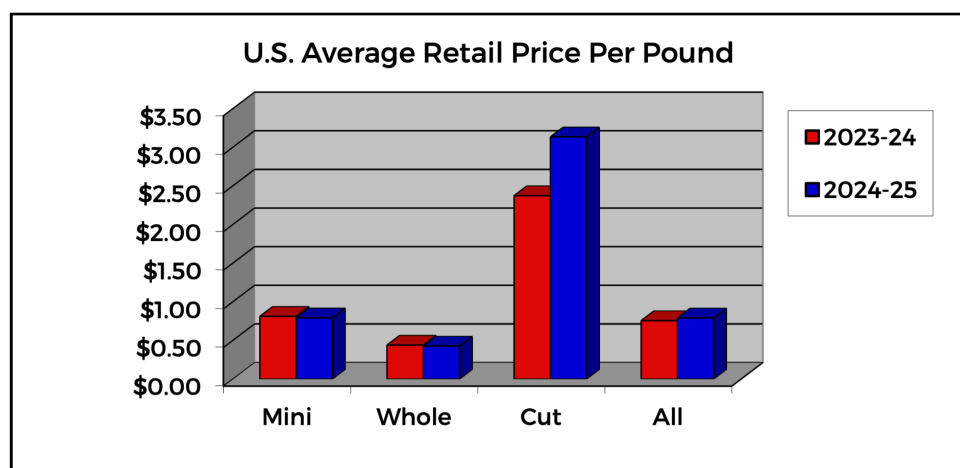
Compiled by the National Watermelon Promotion Board



Data current through
October 5, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	326,298,002	332,669,154	2.0%	9.6%
Whole	2,715,841,272	2,698,122,562	-0.7%	78.2%
Cut	520,092,351	420,083,169	-19.2%	12.2%
Total	3,562,231,624	3,450,874,885	-3.1%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.81	\$0.79
Whole	\$0.44	\$0.43
Cut	\$2.37	\$3.13
All	\$0.76	\$0.79



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.15	\$0.93
California 2024-25	\$0.49	\$2.98	\$0.87
Great Lakes 2023-24	\$0.45	\$3.39	\$0.66
Great Lakes 2024-25	\$0.43	\$3.74	\$0.64
Midsouth 2023-24	\$0.41	\$2.86	\$0.73
Midsouth 2024-25	\$0.41	\$3.28	\$0.72
Northeast 2023-24	\$0.42	\$2.09	\$0.93
Northeast 2024-25	\$0.41	\$2.49	\$0.87
Plains 2023-24	\$0.42	\$2.74	\$0.86
Plains 2024-25	\$0.41	\$2.61	\$0.85
Southcentral 2023-24	\$0.44	\$1.75	\$0.78
Southcentral 2024-25	\$0.42	\$3.47	\$0.80
Southeast 2023-24	\$0.46	\$2.88	\$0.83
Southeast 2024-25	\$0.43	\$3.22	\$0.82
West 2023-24	\$0.46	\$1.96	\$0.76
West 2024-25	\$0.44	\$3.59	\$0.80

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 October 5, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

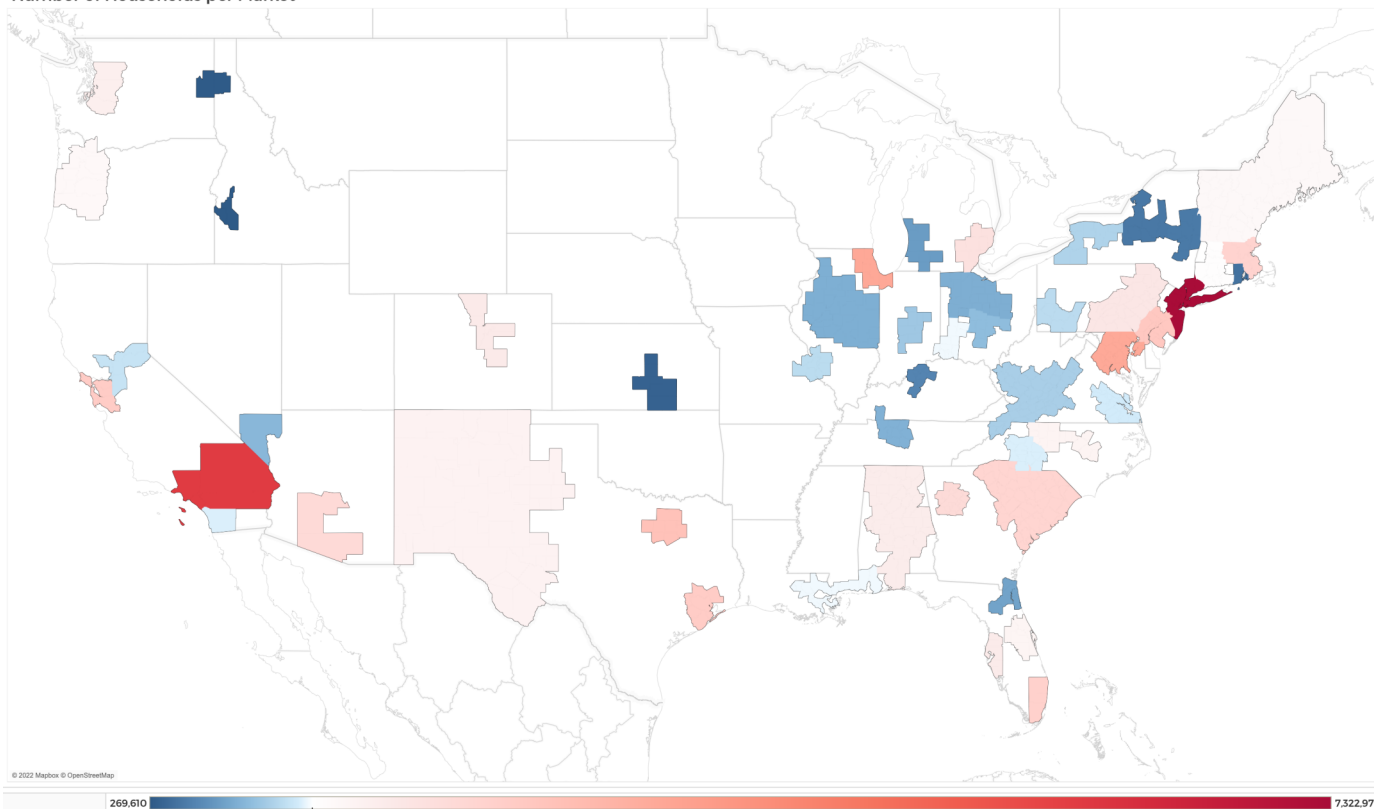
Jason Hanselman • Phone: (407) 925-5285 • Email: jasonh116@gmail.com

Scanner Data Regions



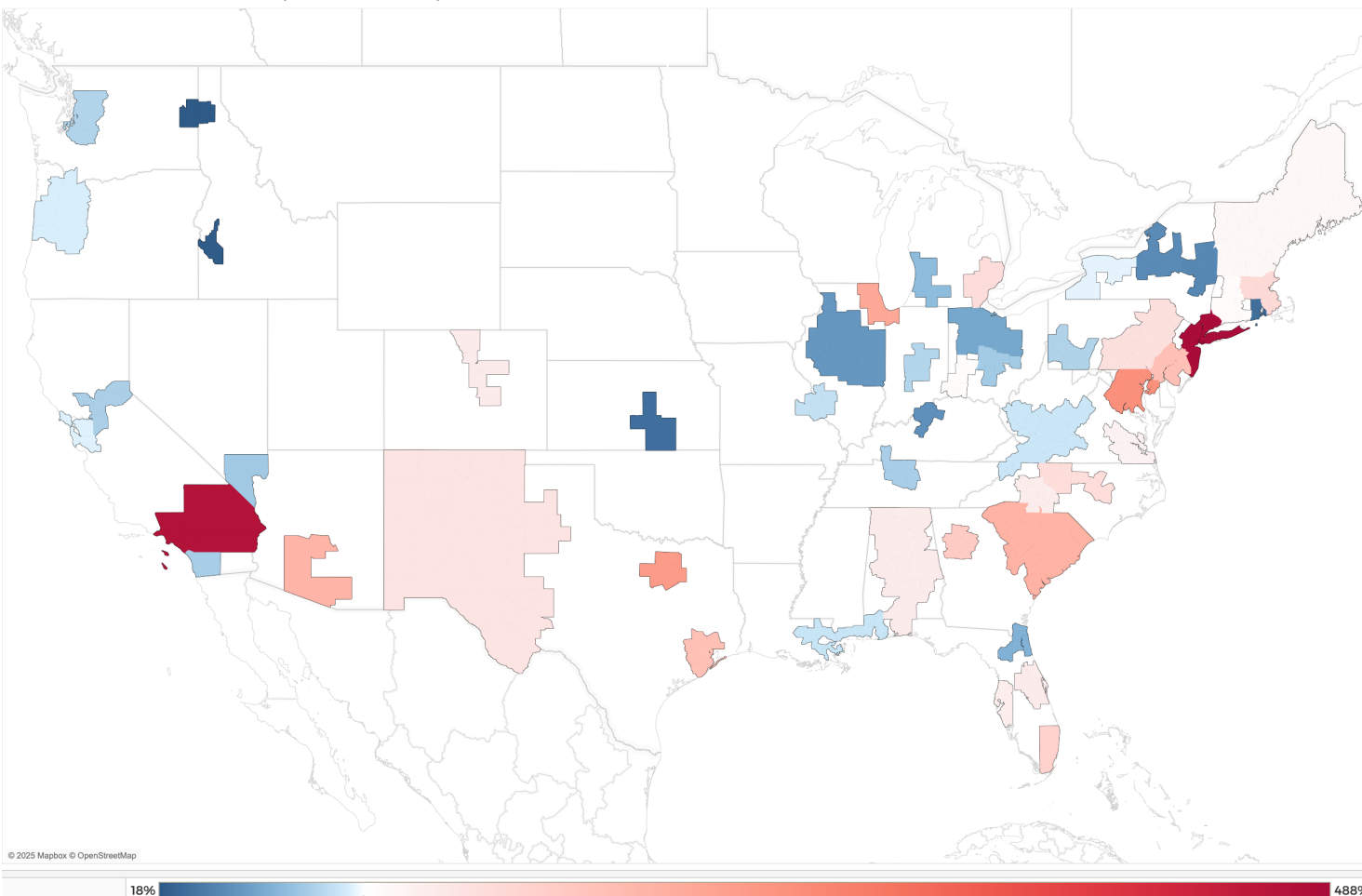
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	237,644,126	56,411,992	59,976,116	354,032,234
California 2024-25	223,703,990	40,939,218	64,305,935	328,949,143
Percent Growth	-5.9%	-27.4%	7.2%	-7.1%
2024-25 % of Total	68.0%	12.4%	19.5%	100.0%
Great Lakes 2023-24	414,188,130	35,274,828	44,621,873	494,084,832
Great Lakes 2024-25	409,380,028	34,717,315	49,046,308	493,143,651
Percent Growth	-1.2%	-1.6%	9.9%	-0.2%
2024-25 % of Total	83.0%	7.0%	9.9%	100.0%
Midsouth 2023-24	417,401,126	55,792,201	40,441,321	513,634,648
Midsouth 2024-25	414,096,997	52,956,539	41,357,683	508,411,219
Percent Growth	-0.8%	-5.1%	2.3%	-1.0%
2024-25 % of Total	81.4%	10.4%	8.1%	100.0%
Northeast 2023-24	454,947,256	96,396,977	41,946,155	593,290,389
Northeast 2024-25	449,549,555	82,052,410	42,845,940	574,447,905
Percent Growth	-1.2%	-14.9%	2.1%	-3.2%
2024-25 % of Total	78.3%	14.3%	7.5%	100.0%
Plains 2023-24	213,144,304	18,463,632	11,688,873	243,296,808
Plains 2024-25	214,226,884	20,047,126	12,920,862	247,194,872
Percent Growth	0.5%	8.6%	10.5%	1.6%
2024-25 % of Total	86.7%	8.1%	5.2%	100.0%
Southcentral 2023-24	328,494,434	93,529,744	27,176,359	449,200,537
Southcentral 2024-25	330,913,703	49,215,287	26,799,628	406,928,619
Percent Growth	0.7%	-47.4%	-1.4%	-9.4%
2024-25 % of Total	81.3%	12.1%	6.6%	100.0%
Southeast 2023-24	363,449,028	105,278,742	45,054,008	513,781,778
Southeast 2024-25	351,230,106	105,883,559	43,381,866	500,495,531
Percent Growth	-3.4%	0.6%	-3.7%	-2.6%
2024-25 % of Total	70.2%	21.2%	8.7%	100.0%
West 2023-24	286,572,867	58,944,235	55,393,297	400,910,399
West 2024-25	305,021,299	34,271,714	52,010,932	391,303,945
Percent Growth	6.4%	-41.9%	-6.1%	-2.4%
2024-25 % of Total	77.9%	8.8%	13.3%	100.0%

Number of Households per Market



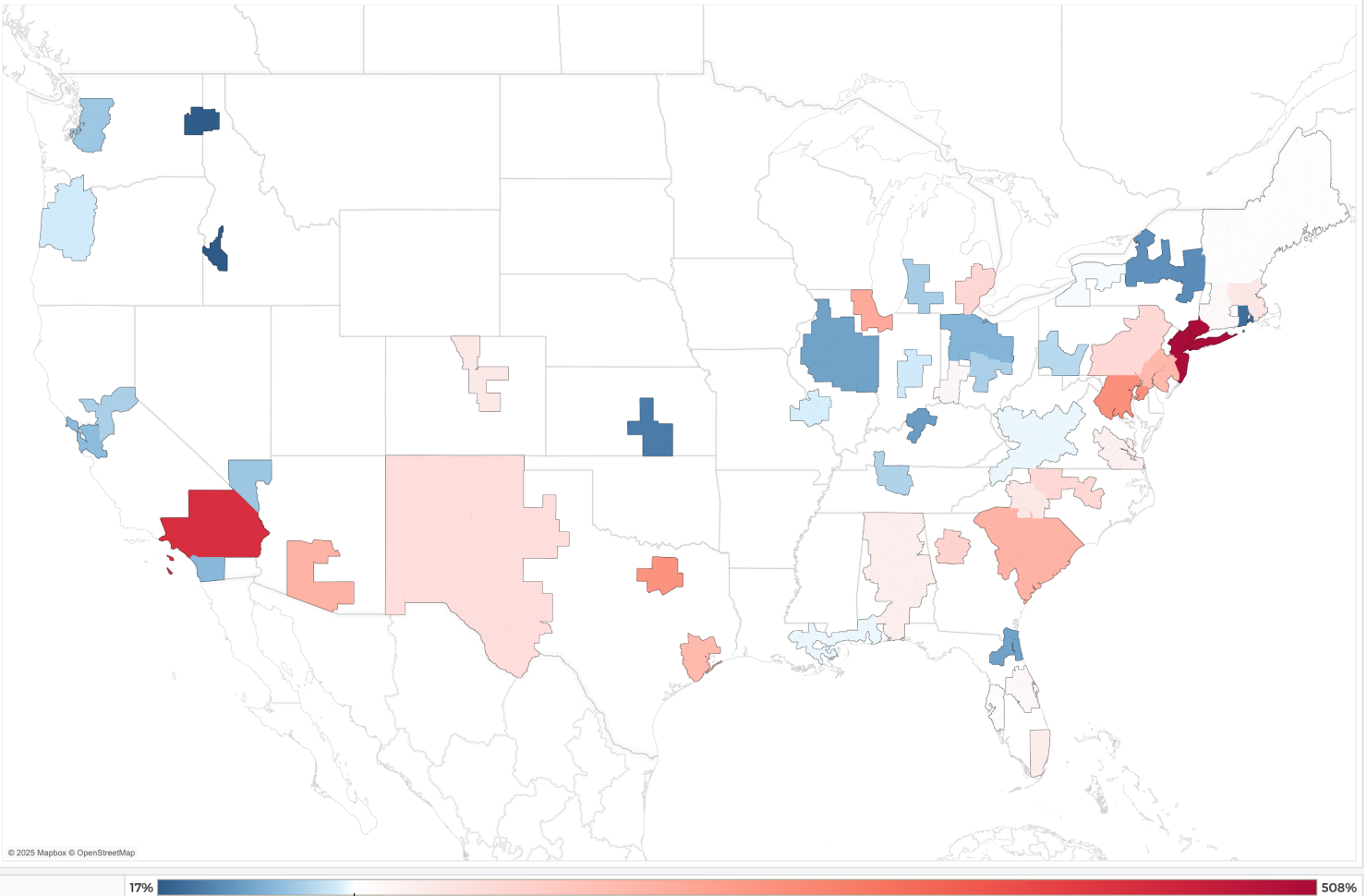
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



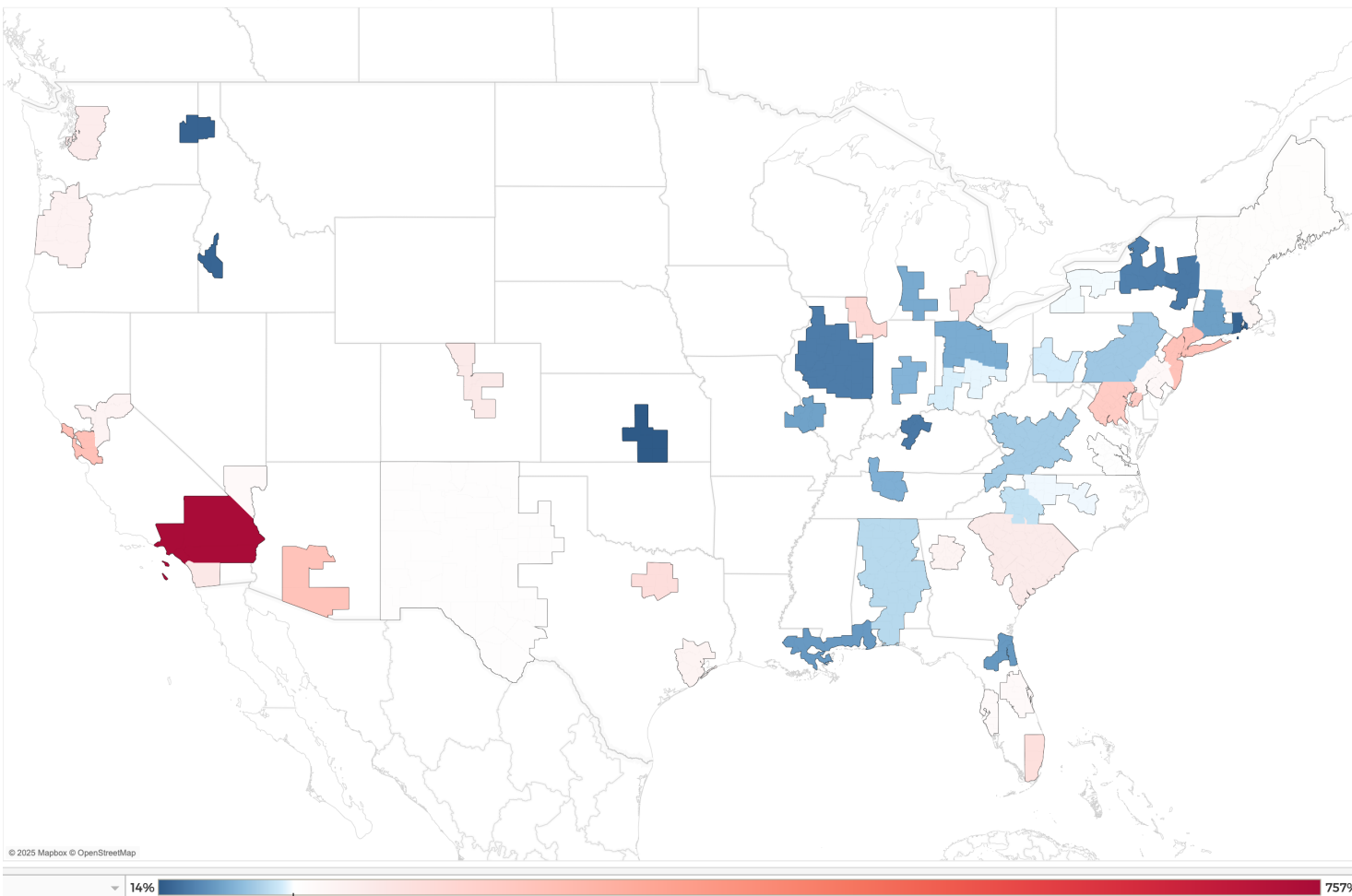
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,885,558	33,655,492	5.6%	PITTSBURGH	28,789,634	28,284,359	-1.8%
HARRISBURG/SCRANTON	48,239,920	50,691,346	5.1%	LOUISVILLE	16,659,514	16,352,901	-1.8%
GRAND RAPIDS	22,963,883	23,973,980	4.4%	ROANOKE	32,439,125	31,626,465	-2.5%
SYRACUSE	14,845,520	15,325,308	3.2%	HARTFORD/SPRINGFIELD	38,397,971	37,263,391	-3.0%
WEST TEX/NEW MEXICO	47,486,927	48,721,121	2.6%	BIRMINGHAM/MONTGOMERY	46,702,155	45,063,798	-3.5%
DETROIT	51,117,091	52,440,598	2.6%	RICHMOND/NORFOLK	43,166,635	41,492,314	-3.9%
RALEIGH/GREENSBORO	50,907,274	52,215,162	2.6%	NEW YORK	179,546,186	172,076,225	-4.2%
CHARLOTTE	42,795,828	43,862,514	2.5%	PHOENIX/TUCSON	78,790,760	75,363,836	-4.3%
ALBANY	14,501,289	14,794,360	2.0%	PHILADELPHIA	71,845,249	68,714,833	-4.4%
INDIANAPOLIS	28,364,068	28,846,047	1.7%	LAS VEGAS	27,906,871	26,485,089	-5.1%
DENVER	44,356,213	45,064,809	1.6%	ATLANTA	65,971,409	62,562,760	-5.2%
CINCINNATI/DAYTON	36,392,143	36,894,416	1.4%	SPOKANE	6,648,512	6,279,309	-5.6%
TOLEDO	20,139,763	20,375,217	1.2%	PROVIDENCE	10,825,766	10,147,555	-6.3%
WICHITA	10,204,114	10,274,696	0.7%	NEW ENGLAND	41,826,183	39,147,327	-6.4%
ORLANDO	44,558,684	44,794,669	0.5%	BALTIMORE/WASHINGTON	101,623,968	94,827,385	-6.7%
HOUSTON	69,124,337	68,829,686	-0.4%	DALLAS/FT. WORTH	96,153,313	89,468,816	-7.0%
SOUTH CAROLINA	76,705,166	76,289,658	-0.5%	LOS ANGELES	178,740,760	166,285,327	-7.0%
COLUMBUS	26,976,204	26,810,679	-0.6%	MIAMI/FT. LAUDERDALE	63,952,496	58,868,848	-7.9%
PORTLAND	33,165,924	32,945,134	-0.7%	BOSTON	58,763,707	53,963,686	-8.2%
NASHVILLE	27,641,150	27,446,593	-0.7%	CHICAGO	90,774,684	82,290,337	-9.3%
JACKSONVILLE	22,186,755	22,009,866	-0.8%	SAN FRANCISCO	37,010,765	33,341,068	-9.9%
ST. LOUIS	30,976,293	30,697,023	-0.9%	NEW ORLEANS/MOBILE	35,001,486	31,349,416	-10.4%
PEORIA/SPRINGFIELD	17,659,621	17,490,954	-1.0%	SAN DIEGO	31,199,024	27,342,239	-12.4%
TAMPA	44,344,404	43,578,052	-1.7%	BOISE	7,475,227	6,536,166	-12.6%
SACRAMENTO	28,094,741	27,606,561	-1.7%	SEATTLE	32,861,160	28,490,098	-13.3%

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



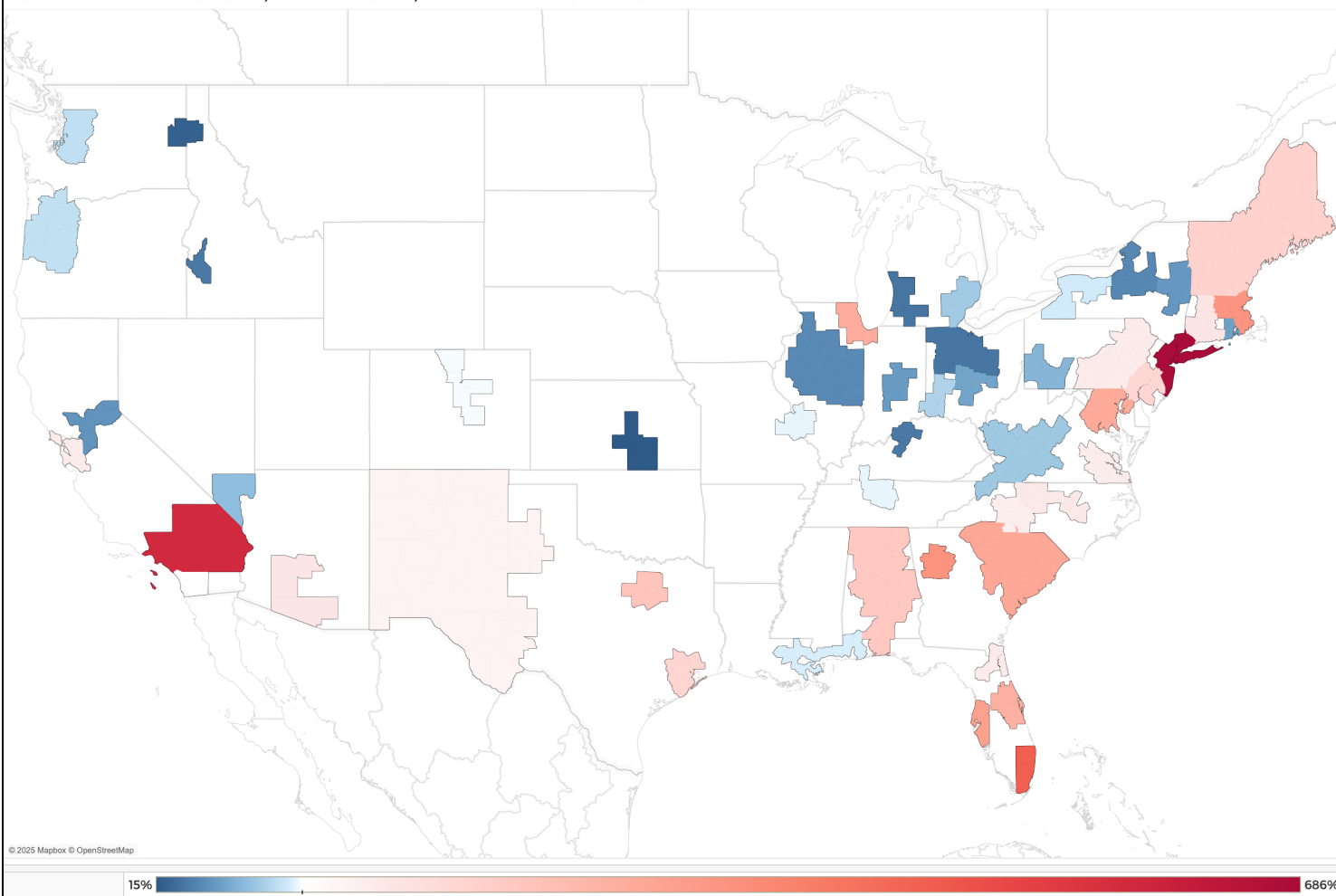
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PORTLAND	22,330,886	24,661,882	10.4%	TAMPA	27,529,016	27,278,338	-0.9%
DENVER	32,249,096	35,537,207	10.2%	SOUTH CAROLINA	59,801,429	59,210,904	-1.0%
SPOKANE	4,446,077	4,831,301	8.7%	NASHVILLE	21,699,040	21,478,291	-1.0%
HARRISBURG/SCRANTON	40,077,627	42,463,058	6.0%	HARTFORD/SPRINGFIELD	29,911,474	29,480,230	-1.4%
GRAND RAPIDS	19,565,025	20,640,333	5.5%	JACKSONVILLE	15,020,504	14,754,935	-1.8%
LAS VEGAS	18,484,325	19,496,559	5.5%	COLUMBUS	21,405,095	20,998,728	-1.9%
HOUSTON	53,654,242	56,581,196	5.5%	NEW ENGLAND	28,012,746	27,458,175	-2.0%
WEST TEX/NEW MEXICO	37,977,170	39,933,103	5.2%	PROVIDENCE	7,552,370	7,398,664	-2.0%
BUFFALO/ROCHESTER	25,452,992	26,343,015	3.5%	PEORIA/SPRINGFIELD	15,024,281	14,673,941	-2.3%
RALEIGH/GREENSBORO	41,633,498	42,884,084	3.0%	BALTIMORE/WASHINGTON	76,907,600	74,710,297	-2.9%
BOSTON	35,047,858	36,008,281	2.7%	NEW YORK	140,831,488	136,096,139	-3.4%
DETROIT	42,116,152	43,220,602	2.6%	LOUISVILLE	14,442,617	13,932,404	-3.5%
PHOENIX/TUCSON	58,270,510	59,631,387	2.3%	LOS ANGELES	118,798,079	114,433,691	-3.7%
SYRACUSE	12,209,892	12,484,378	2.2%	PITTSBURGH	23,173,319	22,287,454	-3.8%
CHARLOTTE	34,587,173	35,334,115	2.2%	SACRAMENTO	21,818,113	20,902,838	-4.2%
BOISE	4,457,865	4,546,421	2.0%	BIRMINGHAM/MONTGOMERY	35,093,706	33,427,496	-4.7%
WICHITA	9,022,628	9,175,423	1.7%	RICHMOND/NORFOLK	33,932,277	32,320,980	-4.7%
INDIANAPOLIS	24,339,085	24,546,810	0.9%	SAN DIEGO	18,390,211	17,500,956	-4.8%
ALBANY	11,675,036	11,773,450	0.8%	ROANOKE	27,264,323	25,920,277	-4.9%
TOLEDO	16,858,544	16,973,445	0.7%	ATLANTA	46,795,620	44,447,967	-5.0%
SEATTLE	19,555,215	19,659,386	0.5%	ST. LOUIS	26,386,614	24,994,515	-5.3%
DALLAS/FT. WORTH	73,261,131	73,628,158	0.5%	NEW ORLEANS/MOBILE	28,389,723	25,916,388	-8.7%
CINCINNATI/DAYTON	30,092,102	30,229,174	0.5%	MIAMI/FT. LAUDERDALE	38,235,811	34,305,294	-10.3%
ORLANDO	29,729,746	29,799,780	0.2%	CHICAGO	71,994,663	63,668,617	-11.6%
PHILADELPHIA	57,173,343	57,105,032	-0.1%	SAN FRANCISCO	22,491,086	17,948,113	-20.2%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	5,674,955	7,614,145	34.2%	BOSTON	4,709,934	4,743,174	0.7%
ST. LOUIS	1,587,415	2,068,048	30.3%	BOISE	779,969	783,274	0.4%
BUFFALO/ROCHESTER	3,256,192	3,831,153	17.7%	RALEIGH/GREENSBORO	3,793,603	3,798,759	0.1%
LOUISVILLE	1,061,345	1,212,928	14.3%	TOLEDO	2,266,041	2,263,015	-0.1%
PEORIA/SPRINGFIELD	1,123,667	1,271,327	13.1%	WEST TEX/NEW MEXICO	4,049,877	4,041,431	-0.2%
PROVIDENCE	670,367	753,269	12.4%	BALTIMORE/WASHINGTON	9,035,342	8,990,571	-0.5%
PITTSBURGH	3,271,313	3,609,960	10.4%	HARRISBURG/SCRANTON	2,875,734	2,845,312	-1.1%
ROANOKE	2,662,099	2,930,196	10.1%	SOUTH CAROLINA	5,811,495	5,710,563	-1.7%
CINCINNATI/DAYTON	3,333,608	3,647,601	9.4%	NASHVILLE	2,373,698	2,330,841	-1.8%
SPOKANE	687,743	746,748	8.6%	NEW ENGLAND	4,167,424	4,088,264	-1.9%
SAN DIEGO	5,516,909	5,989,101	8.6%	NEW YORK	10,303,532	9,982,250	-3.1%
SACRAMENTO	4,589,440	4,954,620	8.0%	ORLANDO	4,586,398	4,418,828	-3.7%
SAN FRANCISCO	9,388,078	10,078,264	7.4%	SEATTLE	5,835,596	5,594,659	-4.1%
LOS ANGELES	27,811,548	29,597,044	6.4%	BIRMINGHAM/MONTGOMERY	3,356,023	3,202,070	-4.6%
SYRACUSE	1,285,487	1,355,931	5.5%	RICHMOND/NORFOLK	4,209,851	3,983,307	-5.4%
PHILADELPHIA	4,272,934	4,487,177	5.0%	TAMPA	4,604,209	4,298,725	-6.6%
COLUMBUS	3,564,779	3,741,723	5.0%	HOUSTON	5,316,056	4,907,759	-7.7%
JACKSONVILLE	1,793,844	1,880,467	4.8%	MIAMI/FT. LAUDERDALE	7,464,652	6,874,948	-7.9%
ALBANY	1,153,770	1,205,534	4.5%	ATLANTA	5,384,887	4,915,604	-8.7%
CHARLOTTE	3,250,550	3,385,714	4.2%	DALLAS/FT. WORTH	7,827,447	7,001,286	-10.6%
INDIANAPOLIS	2,348,934	2,412,945	2.7%	LAS VEGAS	4,975,130	4,426,587	-11.0%
NEW ORLEANS/MOBILE	1,857,600	1,898,654	2.2%	HARTFORD/SPRINGFIELD	2,283,734	2,019,654	-11.6%
PORTLAND	4,938,828	5,036,161	2.0%	PHOENIX/TUCSON	11,429,167	9,931,325	-13.1%
DETROIT	6,275,520	6,391,878	1.9%	DENVER	6,677,966	5,798,948	-13.2%
GRAND RAPIDS	2,204,920	2,221,227	0.7%	WICHITA	624,760	541,059	-13.4%

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	3,002,264	3,634,460	21.1%	TAMPA	12,211,179	12,000,990	-1.7%
INDIANAPOLIS	1,676,049	1,886,292	12.5%	MIAMI/FT. LAUDERDALE	18,252,033	17,688,606	-3.1%
TOLEDO	1,015,177	1,138,758	12.2%	ATLANTA	13,790,903	13,199,188	-4.3%
ROANOKE	2,512,704	2,775,991	10.5%	GRAND RAPIDS	1,193,939	1,112,420	-6.8%
SYRACUSE	1,350,141	1,484,999	10.0%	HARTFORD/SPRINGFIELD	6,202,763	5,763,507	-7.1%
BUFFALO/ROCHESTER	3,176,374	3,481,324	9.6%	NEW YORK	28,411,166	25,997,836	-8.5%
ALBANY	1,672,483	1,815,376	8.5%	WEST TEX/NEW MEXICO	5,459,880	4,746,587	-13.1%
LOUISVILLE	1,155,552	1,207,569	4.5%	CHICAGO	13,105,066	11,007,575	-16.0%
DETROIT	2,725,419	2,828,117	3.8%	NEW ENGLAND	9,646,012	7,600,888	-21.2%
CHARLOTTE	4,958,105	5,142,684	3.7%	PROVIDENCE	2,603,029	1,995,621	-23.3%
SACRAMENTO	1,687,188	1,749,103	3.7%	NEW ORLEANS/MOBILE	4,754,163	3,534,374	-25.7%
SAN FRANCISCO	5,131,601	5,314,691	3.6%	HOUSTON	10,154,039	7,340,730	-27.7%
ORLANDO	10,242,540	10,576,061	3.3%	BALTIMORE/WASHINGTON	15,681,026	11,126,517	-29.0%
RICHMOND/NORFOLK	5,024,507	5,188,027	3.3%	BOSTON	19,005,915	13,212,231	-30.5%
COLUMBUS	2,006,330	2,070,228	3.2%	LOS ANGELES	32,131,133	22,254,592	-30.7%
SOUTH CAROLINA	11,092,242	11,368,191	2.5%	DENVER	5,429,151	3,728,653	-31.3%
PEORIA/SPRINGFIELD	1,511,673	1,545,686	2.3%	PHILADELPHIA	10,398,972	7,122,624	-31.5%
BIRMINGHAM/MONTGOMERY	8,252,426	8,434,232	2.2%	PHOENIX/TUCSON	9,091,083	5,801,124	-36.2%
NASHVILLE	3,568,412	3,637,460	1.9%	DALLAS/FT. WORTH	15,064,736	8,839,372	-41.3%
HARRISBURG/SCRANTON	5,286,559	5,382,975	1.8%	LAS VEGAS	4,447,416	2,561,943	-42.4%
PITTSBURGH	2,345,003	2,386,945	1.8%	PORTLAND	5,896,210	3,247,091	-44.9%
CINCINNATI/DAYTON	2,966,432	3,017,641	1.7%	BOISE	2,237,394	1,206,470	-46.1%
RALEIGH/GREENSBORO	5,480,173	5,532,320	1.0%	SAN DIEGO	7,291,904	3,852,182	-47.2%
WICHITA	556,726	558,214	0.3%	SPOKANE	1,514,692	701,260	-53.7%
JACKSONVILLE	5,372,407	5,374,463	0.0%	SEATTLE	7,470,349	3,236,053	-56.7%