



Retail Scan Data

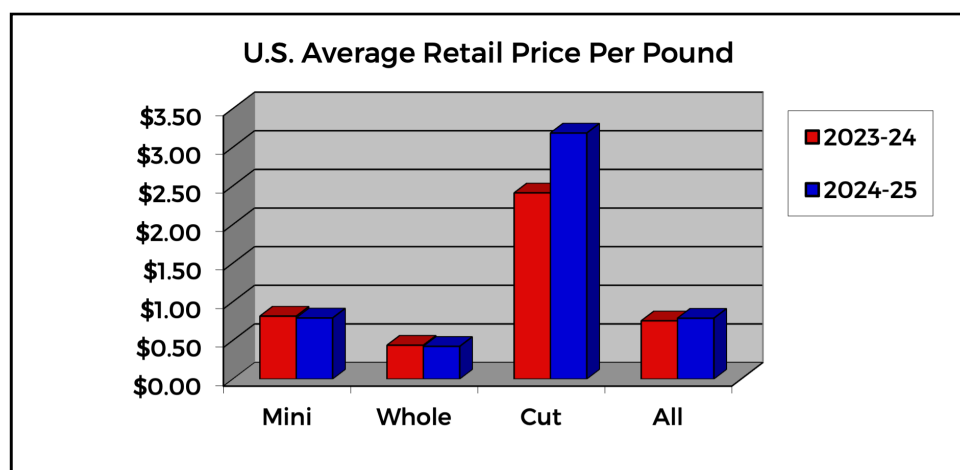
Compiled by the National Watermelon Promotion Board



Data current through
November 2, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	328,724,026	333,750,878	1.5%	9.6%
Whole	2,737,930,911	2,728,525,315	-0.3%	78.5%
Cut	509,090,993	414,883,565	-18.5%	11.9%
Total	3,575,745,929	3,477,159,757	-2.8%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.81	\$0.79
Whole	\$0.44	\$0.42
Cut	\$2.41	\$3.18
All	\$0.75	\$0.79



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.18	\$0.94
California 2024-25	\$0.48	\$3.01	\$0.87
Great Lakes 2023-24	\$0.45	\$3.41	\$0.67
Great Lakes 2024-25	\$0.43	\$3.74	\$0.64
Midsouth 2023-24	\$0.41	\$2.88	\$0.74
Midsouth 2024-25	\$0.40	\$3.29	\$0.72
Northeast 2023-24	\$0.41	\$2.10	\$0.92
Northeast 2024-25	\$0.41	\$2.51	\$0.87
Plains 2023-24	\$0.40	\$2.90	\$0.87
Plains 2024-25	\$0.39	\$3.22	\$0.84
Southcentral 2023-24	\$0.45	\$1.80	\$0.78
Southcentral 2024-25	\$0.42	\$3.53	\$0.80
Southeast 2023-24	\$0.45	\$2.88	\$0.83
Southeast 2024-25	\$0.43	\$3.23	\$0.82
West 2023-24	\$0.46	\$2.01	\$0.76
West 2024-25	\$0.44	\$3.63	\$0.79

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 November 2, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

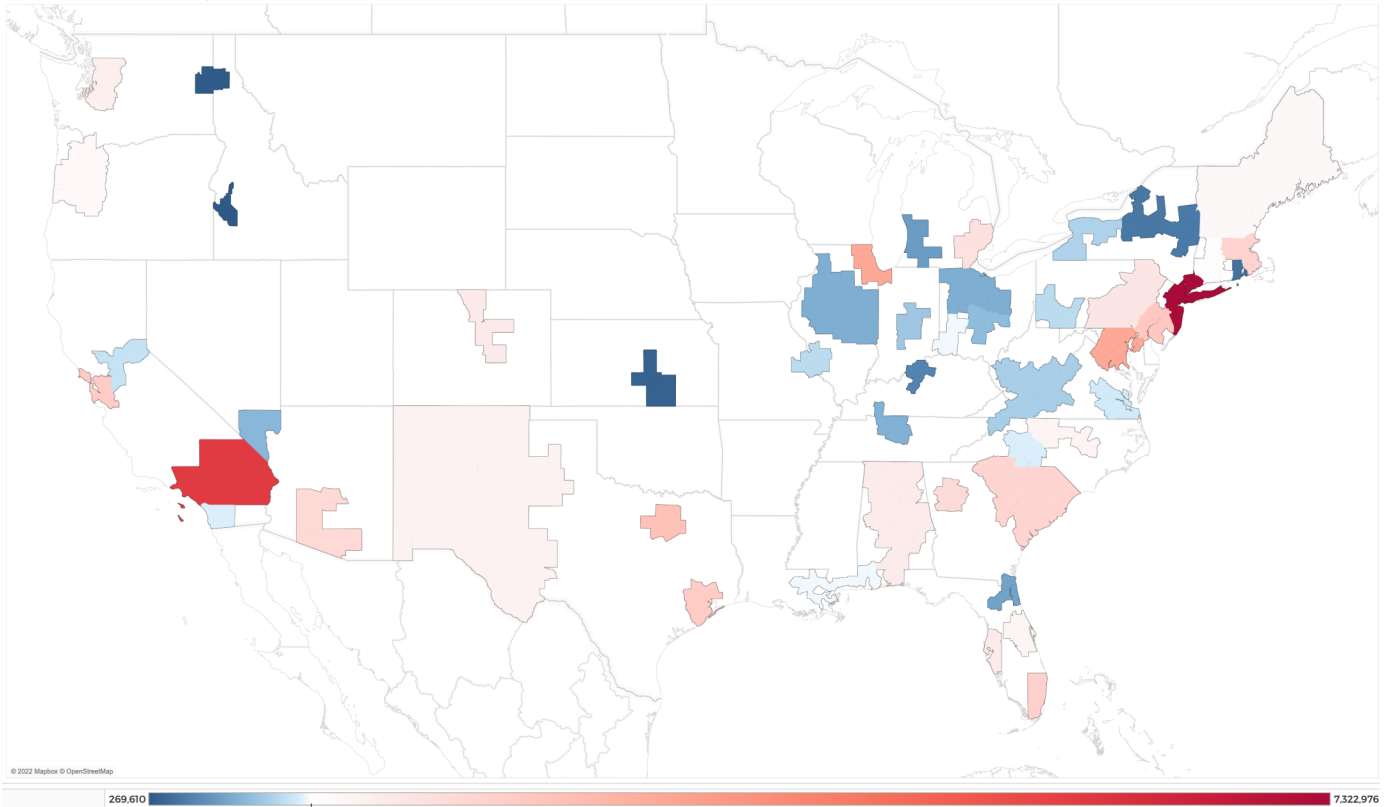
Jason Hanselman • Phone: (407) 925-5285 • Email: jasonh116@gmail.com

Scanner Data Regions



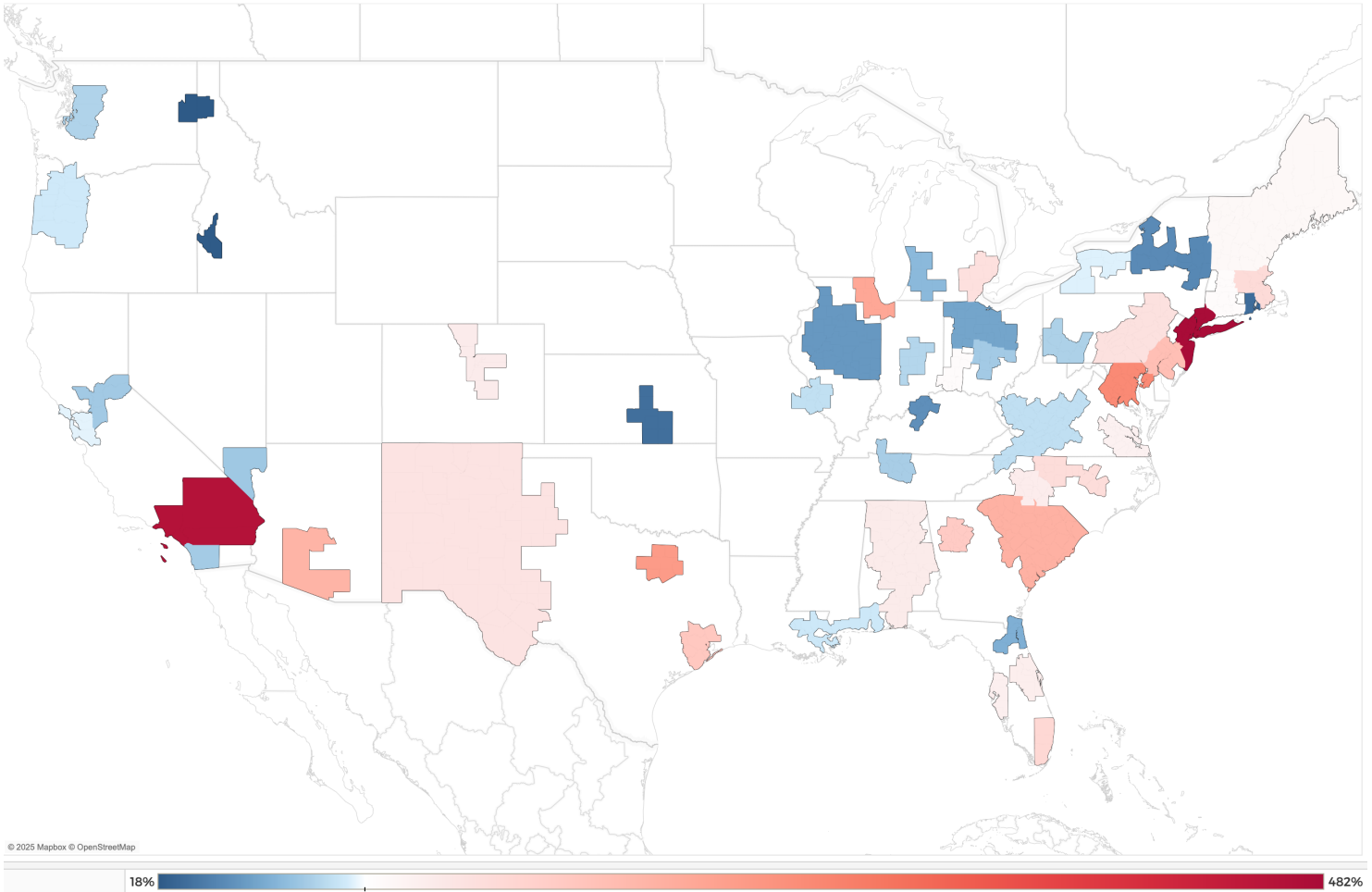
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	237,130,115	55,346,062	59,974,017	352,450,194
California 2024-25	223,277,696	40,522,956	64,108,922	327,909,573
Percent Growth	-5.8%	-26.8%	6.9%	-7.0%
2024-25 % of Total	68.1%	12.4%	19.6%	100.0%
Great Lakes 2023-24	417,660,385	36,025,954	44,732,445	498,418,784
Great Lakes 2024-25	411,117,681	35,594,186	49,150,742	495,862,609
Percent Growth	-1.6%	-1.2%	9.9%	-0.5%
2024-25 % of Total	82.9%	7.2%	9.9%	100.0%
Midsouth 2023-24	420,039,947	55,187,319	41,480,871	516,708,138
Midsouth 2024-25	417,176,724	52,260,140	42,237,351	511,674,216
Percent Growth	-0.7%	-5.3%	1.8%	-1.0%
2024-25 % of Total	81.5%	10.2%	8.3%	100.0%
Northeast 2023-24	459,368,113	95,202,348	43,012,152	597,582,613
Northeast 2024-25	454,186,787	80,964,077	44,018,090	579,168,954
Percent Growth	-1.1%	-15.0%	2.3%	-3.1%
2024-25 % of Total	78.4%	14.0%	7.6%	100.0%
Plains 2023-24	229,881,056	16,318,203	12,207,139	258,406,398
Plains 2024-25	236,410,327	19,071,394	12,792,007	268,273,728
Percent Growth	2.8%	16.9%	4.8%	3.8%
2024-25 % of Total	88.1%	7.1%	4.8%	100.0%
Southcentral 2023-24	324,807,194	88,804,036	27,227,559	440,838,789
Southcentral 2024-25	329,563,462	47,009,608	26,567,145	403,140,215
Percent Growth	1.5%	-47.1%	-2.4%	-8.6%
2024-25 % of Total	81.7%	11.7%	6.6%	100.0%
Southeast 2023-24	363,120,648	105,136,566	44,971,957	513,229,171
Southeast 2024-25	352,750,444	105,734,829	42,934,069	501,419,342
Percent Growth	-2.9%	0.6%	-4.5%	-2.3%
2024-25 % of Total	70.4%	21.1%	8.6%	100.0%
West 2023-24	285,923,451	57,070,505	55,117,886	398,111,842
West 2024-25	304,042,194	33,726,375	51,942,552	389,711,121
Percent Growth	6.3%	-40.9%	-5.8%	-2.1%
2024-25 % of Total	78.0%	8.7%	13.3%	100.0%

Number of Households per Market



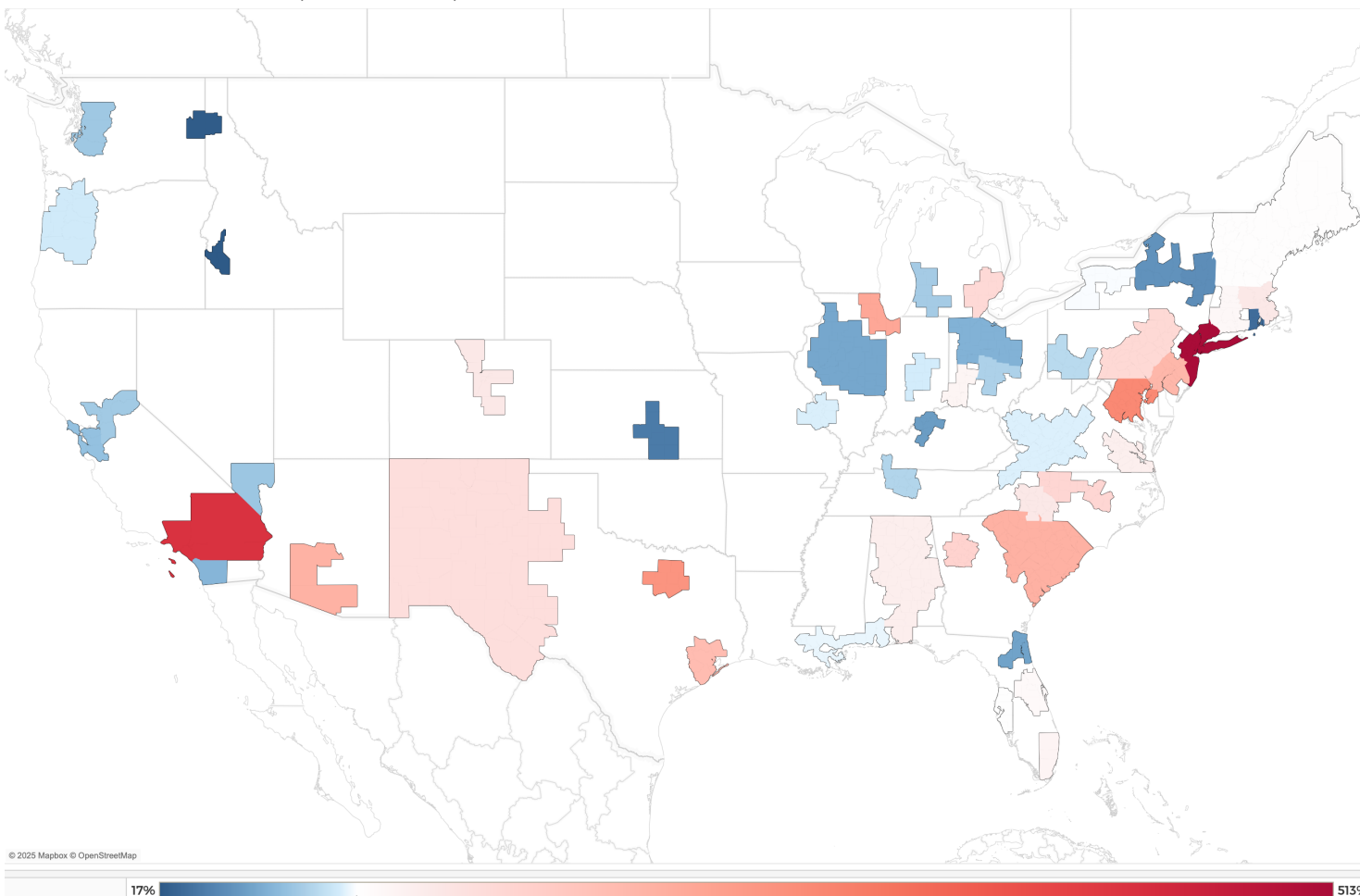
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



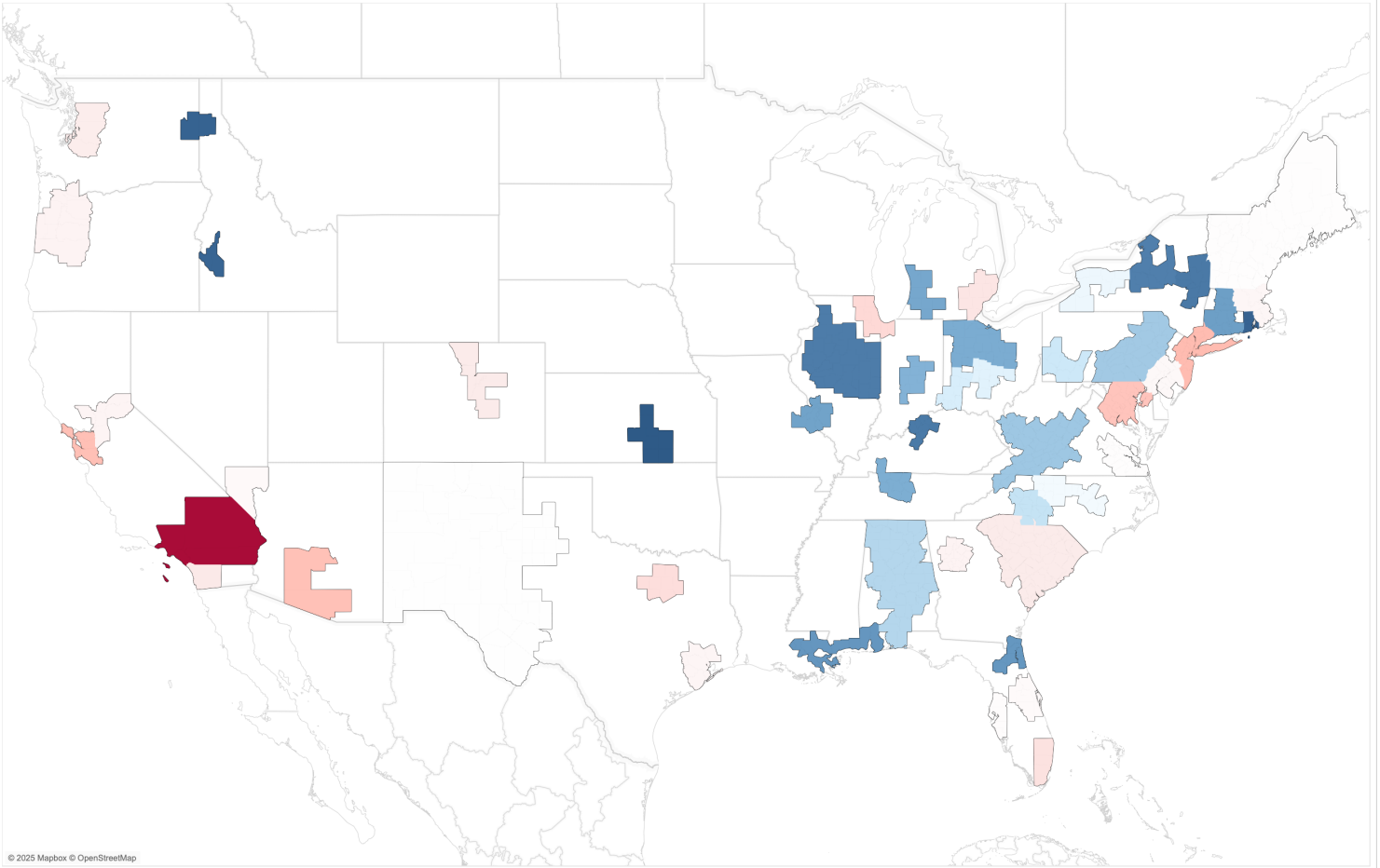
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,840,807	33,602,973	5.5%	LOUISVILLE	16,659,181	16,337,597	-1.9%
GRAND RAPIDS	22,602,120	23,587,392	4.4%	SACRAMENTO	27,326,782	26,740,278	-2.1%
HARRISBURG/SCRANTON	48,828,605	50,697,646	3.8%	PITTSBURGH	28,727,202	28,105,073	-2.2%
SYRACUSE	14,859,698	15,401,156	3.6%	TAMPA	44,090,484	43,100,278	-2.2%
RALEIGH/GREENSBORO	51,493,700	52,881,702	2.7%	BIRMINGHAM/MONTGOMERY	46,553,054	45,132,299	-3.1%
CHARLOTTE	43,383,104	44,452,674	2.5%	HARTFORD/SPRINGFIELD	38,410,953	37,189,784	-3.2%
WEST TEX/NEW MEXICO	47,955,103	49,039,889	2.3%	PHOENIX/TUCSON	78,384,743	75,562,405	-3.6%
INDIANAPOLIS	28,362,408	28,977,527	2.2%	LAS VEGAS	27,442,398	26,413,647	-3.7%
DETROIT	50,183,085	51,186,709	2.0%	ATLANTA	65,511,812	62,596,306	-4.5%
CINCINNATI/DAYTON	36,480,011	37,177,446	1.9%	PHILADELPHIA	72,587,872	69,312,223	-4.5%
DENVER	44,376,171	45,017,178	1.4%	NEW YORK	180,540,667	171,285,316	-5.1%
TOLEDO	19,793,336	20,068,216	1.4%	NEW ORLEANS/MOBILE	34,029,622	32,254,875	-5.2%
WICHITA	10,126,456	10,240,776	1.1%	BALTIMORE/WASHINGTON	105,252,422	98,692,054	-6.2%
ALBANY	14,691,791	14,855,403	1.1%	NEW ENGLAND	41,564,521	38,964,925	-6.3%
HOUSTON	64,346,087	64,617,922	0.4%	PROVIDENCE	10,654,780	9,959,173	-6.5%
SOUTH CAROLINA	76,836,359	77,152,209	0.4%	SPOKANE	6,756,175	6,289,660	-6.9%
ORLANDO	43,763,127	43,909,803	0.3%	LOS ANGELES	177,791,342	165,363,676	-7.0%
PEORIA/SPRINGFIELD	17,810,738	17,838,140	0.2%	DALLAS/FT. WORTH	96,766,224	89,272,709	-7.7%
COLUMBUS	26,980,032	26,843,556	-0.5%	BOSTON	58,387,887	53,603,925	-8.2%
JACKSONVILLE	22,007,087	21,882,282	-0.6%	CHICAGO	90,278,612	82,386,962	-8.7%
ST. LOUIS	30,814,983	30,637,433	-0.6%	MIAMI/FT. LAUDERDALE	61,150,176	55,671,443	-9.0%
NASHVILLE	27,687,750	27,480,343	-0.7%	SAN FRANCISCO	38,101,136	33,932,207	-10.9%
PORTLAND	32,701,983	32,425,026	-0.8%	SAN DIEGO	30,455,948	26,995,078	-11.4%
RICHMOND/NORFOLK	42,822,043	42,160,683	-1.5%	BOISE	7,354,861	6,458,629	-12.2%
ROANOKE	31,098,740	30,542,976	-1.8%	SEATTLE	32,552,145	28,477,141	-12.5%

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

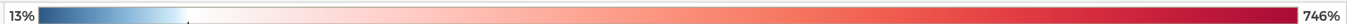


Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
DENVER	32,298,400	35,503,679	9.9%	PHILADELPHIA	57,988,822	57,884,800	-0.2%
PORTLAND	22,226,793	24,357,331	9.6%	PROVIDENCE	7,265,351	7,212,665	-0.7%
SPOKANE	4,411,216	4,788,767	8.6%	NASHVILLE	21,715,906	21,490,939	-1.0%
LAS VEGAS	18,240,517	19,411,633	6.4%	TAMPA	27,347,164	26,939,566	-1.5%
HOUSTON	52,430,713	55,241,367	5.4%	PEORIA/SPRINGFIELD	15,469,731	15,234,732	-1.5%
GRAND RAPIDS	19,278,058	20,248,958	5.0%	JACKSONVILLE	14,856,285	14,627,487	-1.5%
HARRISBURG/SCRANTON	40,499,401	42,412,908	4.7%	COLUMBUS	21,376,464	21,027,682	-1.6%
WEST TEX/NEW MEXICO	38,184,038	39,961,939	4.7%	RICHMOND/NORFOLK	33,561,796	32,941,350	-1.8%
BUFFALO/ROCHESTER	25,401,342	26,322,795	3.6%	HARTFORD/SPRINGFIELD	30,006,567	29,443,135	-1.9%
RALEIGH/GREENSBORO	42,093,008	43,510,777	3.4%	NEW ENGLAND	27,727,758	27,144,556	-2.1%
SYRACUSE	12,203,189	12,564,132	3.0%	BALTIMORE/WASHINGTON	80,637,339	78,091,631	-3.2%
BOISE	4,452,222	4,558,297	2.4%	LOUISVILLE	14,432,310	13,906,735	-3.6%
WICHITA	8,947,229	9,154,392	2.3%	NEW ORLEANS/MOBILE	26,694,395	25,690,710	-3.8%
PHOENIX/TUCSON	58,571,928	59,879,951	2.2%	PITTSBURGH	23,057,269	22,187,741	-3.8%
BOSTON	34,984,971	35,744,381	2.2%	LOS ANGELES	118,123,819	113,637,016	-3.8%
CHARLOTTE	35,062,226	35,812,222	2.1%	ATLANTA	46,607,730	44,831,774	-3.8%
DETROIT	41,309,008	42,090,600	1.9%	SAN DIEGO	17,775,730	17,092,040	-3.8%
INDIANAPOLIS	24,311,078	24,665,571	1.5%	ROANOKE	26,075,531	25,052,013	-3.9%
CINCINNATI/DAYTON	30,132,576	30,490,012	1.2%	BIRMINGHAM/MONTGOMERY	34,673,928	33,163,265	-4.4%
TOLEDO	16,508,875	16,632,725	0.8%	NEW YORK	143,221,189	136,498,271	-4.7%
SEATTLE	19,561,986	19,700,676	0.7%	SACRAMENTO	21,018,218	20,031,538	-4.7%
DALLAS/FT. WORTH	72,851,430	73,314,334	0.6%	ST. LOUIS	26,317,405	24,964,844	-5.1%
SOUTH CAROLINA	60,053,538	60,353,058	0.5%	CHICAGO	72,362,298	64,429,892	-11.0%
ALBANY	11,803,641	11,818,357	0.1%	MIAMI/FT. LAUDERDALE	34,915,808	30,628,934	-12.3%
ORLANDO	28,854,748	28,816,591	-0.1%	SAN FRANCISCO	23,632,412	18,654,600	-21.1%

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

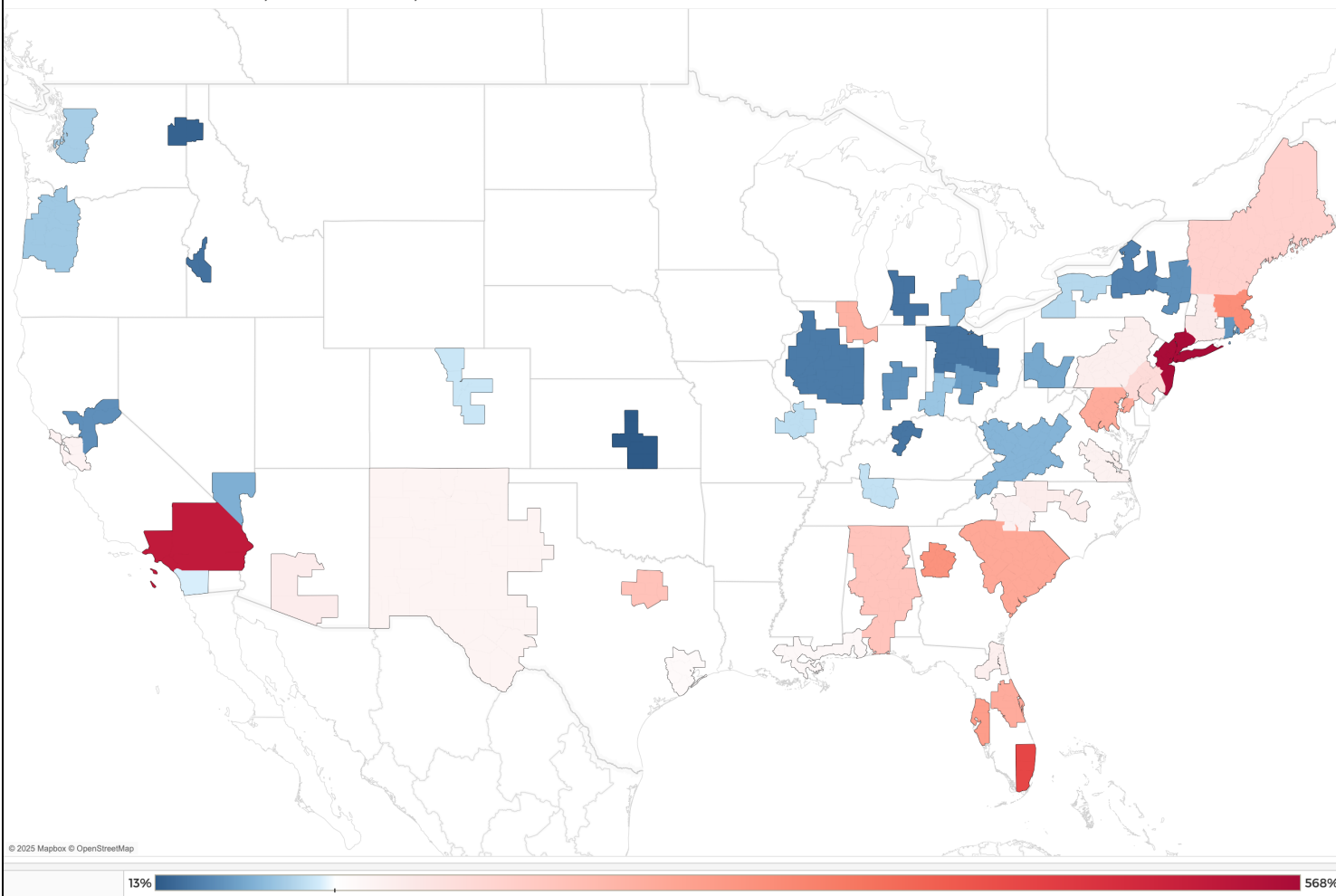


© 2025 Mapbox © OpenStreetMap



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
ST. LOUIS	1,554,768	2,085,553	34.1%	BALTIMORE/WASHINGTON	9,710,855	9,777,808	0.7%
CHICAGO	5,682,465	7,600,581	33.8%	GRAND RAPIDS	2,172,306	2,180,853	0.4%
BUFFALO/ROCHESTER	3,269,189	3,817,252	16.8%	HARRISBURG/SCRANTON	2,925,918	2,912,269	-0.5%
LOUISVILLE	1,055,550	1,218,573	15.4%	WEST TEX/NEW MEXICO	4,054,619	4,034,354	-0.5%
PEORIA/SPRINGFIELD	1,143,896	1,276,051	11.6%	NEW YORK	10,724,737	10,660,781	-0.6%
PROVIDENCE	667,003	739,238	10.8%	BOISE	781,700	773,784	-1.0%
ROANOKE	2,606,672	2,858,637	9.7%	RALEIGH/GREENSBORO	3,911,421	3,862,527	-1.3%
CINCINNATI/DAYTON	3,356,556	3,675,789	9.5%	NEW ORLEANS/MOBILE	1,862,863	1,836,909	-1.4%
SPOKANE	672,353	734,386	9.2%	NASHVILLE	2,374,568	2,316,340	-2.5%
SAN DIEGO	5,458,091	5,947,041	9.0%	SOUTH CAROLINA	5,894,884	5,738,628	-2.7%
PITTSBURGH	3,299,314	3,561,333	7.9%	NEW ENGLAND	4,222,057	4,104,756	-2.8%
SAN FRANCISCO	9,542,873	10,218,589	7.1%	ORLANDO	4,527,828	4,322,847	-4.5%
LOS ANGELES	27,902,569	29,449,322	5.5%	SEATTLE	5,819,033	5,554,909	-4.5%
JACKSONVILLE	1,757,051	1,853,236	5.5%	BIRMINGHAM/MONTGOMERY	3,366,435	3,188,291	-5.3%
PHILADELPHIA	4,339,781	4,565,404	5.2%	RICHMOND/NORFOLK	4,320,649	4,060,869	-6.0%
SACRAMENTO	4,658,840	4,884,895	4.9%	TAMPA	4,505,226	4,210,351	-6.5%
SYRACUSE	1,287,593	1,345,669	4.5%	ATLANTA	5,455,499	4,984,814	-8.6%
COLUMBUS	3,580,640	3,740,583	4.5%	LAS VEGAS	4,926,456	4,483,210	-9.0%
CHARLOTTE	3,321,235	3,440,931	3.6%	MIAMI/FT. LAUDERDALE	7,359,416	6,635,794	-9.8%
ALBANY	1,165,046	1,198,975	2.9%	PHOENIX/TUCSON	11,292,130	10,124,057	-10.3%
DETROIT	6,136,178	6,284,632	2.4%	DALLAS/FT. WORTH	7,851,844	7,012,923	-10.7%
INDIANAPOLIS	2,360,288	2,412,406	2.2%	HARTFORD/SPRINGFIELD	2,267,614	2,007,579	-11.5%
BOSTON	4,621,916	4,715,256	2.0%	HOUSTON	5,495,528	4,834,139	-12.0%
PORTLAND	4,921,602	4,971,036	1.0%	DENVER	6,689,870	5,739,278	-14.2%
TOLEDO	2,259,900	2,279,985	0.9%	WICHITA	627,717	528,655	-15.8%

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	2,942,810	3,587,036	21.9%	PITTSBURGH	2,370,618	2,355,999	-0.6%
TOLEDO	1,024,560	1,155,506	12.8%	TAMPA	12,238,094	11,950,361	-2.4%
INDIANAPOLIS	1,691,042	1,899,550	12.3%	MIAMI/FT. LAUDERDALE	18,874,952	18,406,715	-2.5%
PEORIA/SPRINGFIELD	1,197,111	1,327,357	10.9%	ATLANTA	13,448,583	12,779,717	-5.0%
SACRAMENTO	1,649,724	1,823,845	10.6%	HARTFORD/SPRINGFIELD	6,136,772	5,739,070	-6.5%
BUFFALO/ROCHESTER	3,170,276	3,462,927	9.2%	NEW YORK	26,594,741	24,126,264	-9.3%
SYRACUSE	1,368,916	1,491,354	8.9%	WEST TEX/NEW MEXICO	5,716,447	5,043,596	-11.8%
ROANOKE	2,416,537	2,632,326	8.9%	NEW ORLEANS/MOBILE	5,472,363	4,727,256	-13.6%
ALBANY	1,723,105	1,838,071	6.7%	CHICAGO	12,233,849	10,356,489	-15.3%
RICHMOND/NORFOLK	4,939,598	5,158,464	4.4%	NEW ENGLAND	9,614,706	7,715,613	-19.8%
CHARLOTTE	4,999,643	5,199,522	4.0%	PROVIDENCE	2,722,425	2,007,269	-26.3%
ORLANDO	10,380,551	10,770,365	3.8%	BALTIMORE/WASHINGTON	14,904,228	10,822,616	-27.4%
LOUISVILLE	1,171,320	1,212,289	3.5%	HOUSTON	6,419,846	4,542,415	-29.2%
BIRMINGHAM/MONTGOMERY	8,512,691	8,780,743	3.1%	LOS ANGELES	31,764,954	22,277,338	-29.9%
SAN FRANCISCO	4,925,851	5,059,019	2.7%	DENVER	5,387,901	3,774,221	-30.0%
DETROIT	2,737,899	2,811,477	2.7%	BOSTON	18,781,001	13,144,288	-30.0%
COLUMBUS	2,022,928	2,075,291	2.6%	PHILADELPHIA	10,259,269	6,862,019	-33.1%
NASHVILLE	3,597,276	3,673,064	2.1%	PHOENIX/TUCSON	8,520,685	5,558,396	-34.8%
SOUTH CAROLINA	10,887,937	11,060,523	1.6%	LAS VEGAS	4,275,425	2,518,804	-41.1%
WICHITA	551,510	557,730	1.1%	PORTLAND	5,553,588	3,096,659	-44.2%
CINCINNATI/DAYTON	2,990,879	3,011,645	0.7%	DALLAS/FT. WORTH	16,062,949	8,945,452	-44.3%
GRAND RAPIDS	1,151,756	1,157,580	0.5%	SAN DIEGO	7,222,126	3,955,996	-45.2%
RALEIGH/GREENSBORO	5,489,271	5,508,397	0.3%	BOISE	2,120,939	1,126,548	-46.9%
JACKSONVILLE	5,393,751	5,401,559	0.1%	SPOKANE	1,672,605	766,506	-54.2%
HARRISBURG/SCRANTON	5,403,286	5,372,469	-0.6%	SEATTLE	7,171,126	3,221,557	-55.1%