

Retail Scan Data

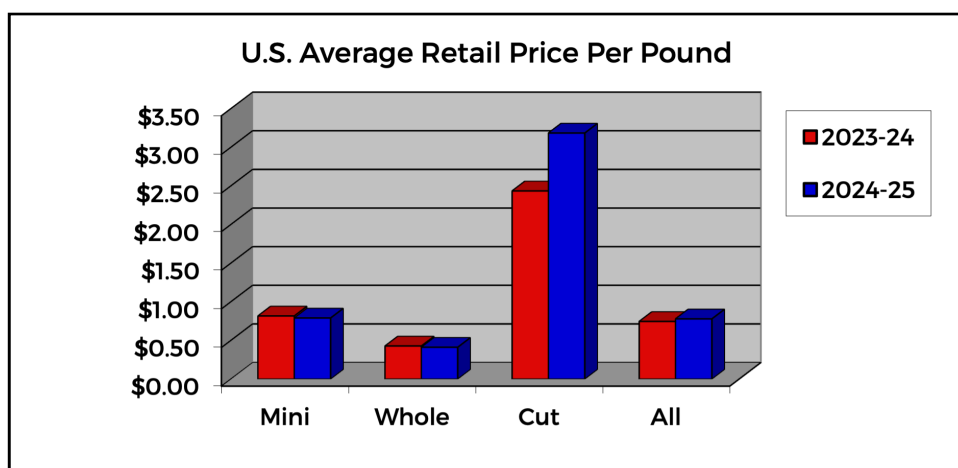
Compiled by the National Watermelon Promotion Board



Data current through
November 30, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	327,634,277	333,856,092	1.9%	9.6%
Whole	2,734,216,649	2,732,722,553	-0.1%	78.5%
Cut	501,898,033	416,576,937	-17.0%	12.0%
Total	3,563,748,959	3,483,155,583	-2.3%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.82	\$0.79
Whole	\$0.43	\$0.41
Cut	\$2.44	\$3.18
All	\$0.75	\$0.78



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.21	\$0.94
California 2024-25	\$0.48	\$3.03	\$0.87
Great Lakes 2023-24	\$0.43	\$3.43	\$0.67
Great Lakes 2024-25	\$0.40	\$3.74	\$0.64
Midsouth 2023-24	\$0.39	\$2.90	\$0.74
Midsouth 2024-25	\$0.39	\$3.29	\$0.72
Northeast 2023-24	\$0.41	\$2.12	\$0.92
Northeast 2024-25	\$0.41	\$2.50	\$0.87
Plains 2023-24	\$0.40	\$2.90	\$0.87
Plains 2024-25	\$0.39	\$3.22	\$0.84
Southcentral 2023-24	\$0.43	\$1.84	\$0.78
Southcentral 2024-25	\$0.41	\$3.51	\$0.80
Southeast 2023-24	\$0.44	\$2.88	\$0.84
Southeast 2024-25	\$0.42	\$3.23	\$0.82
West 2023-24	\$0.45	\$2.06	\$0.77
West 2024-25	\$0.42	\$3.60	\$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 30, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

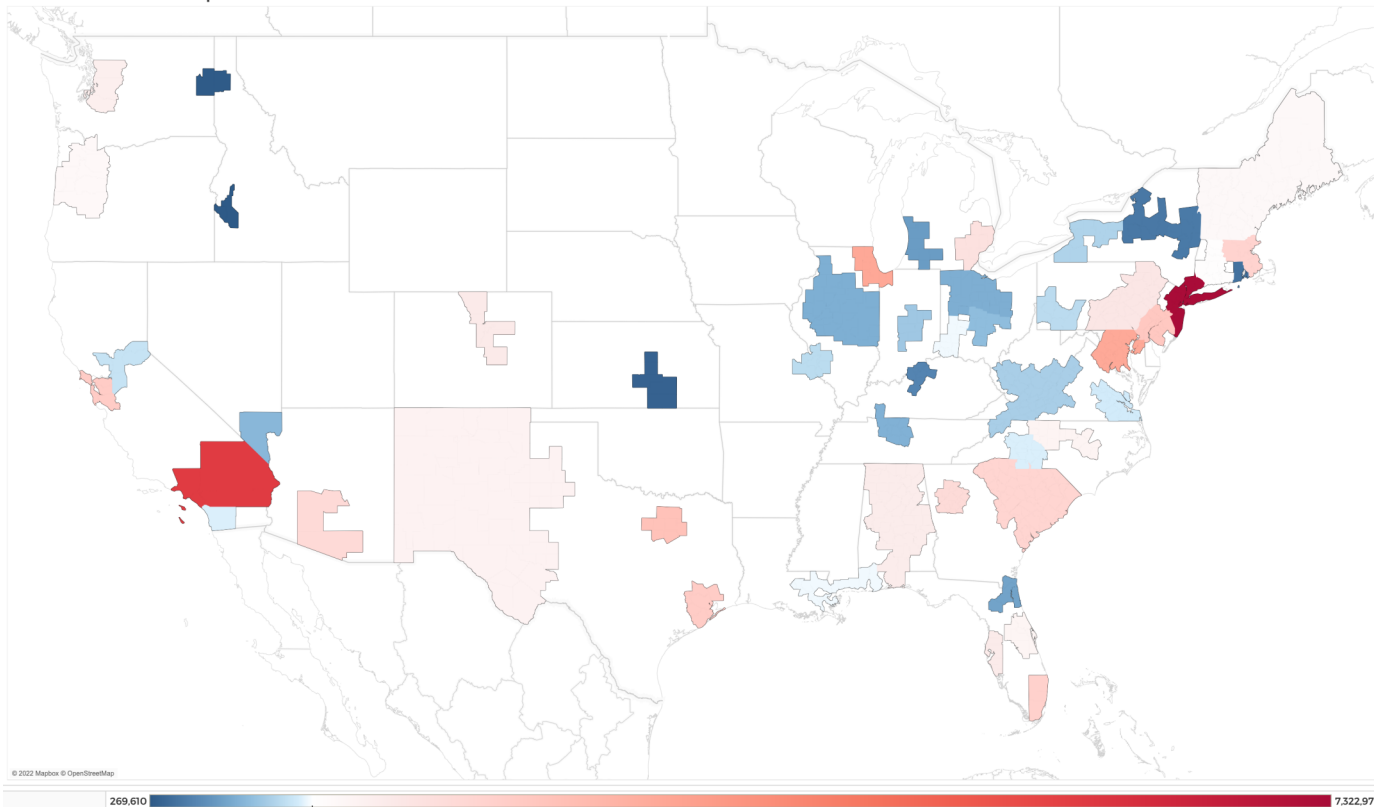
Jason Hanselman • Phone: (407) 925-5285 • Email: jasonh116@gmail.com

Scanner Data Regions



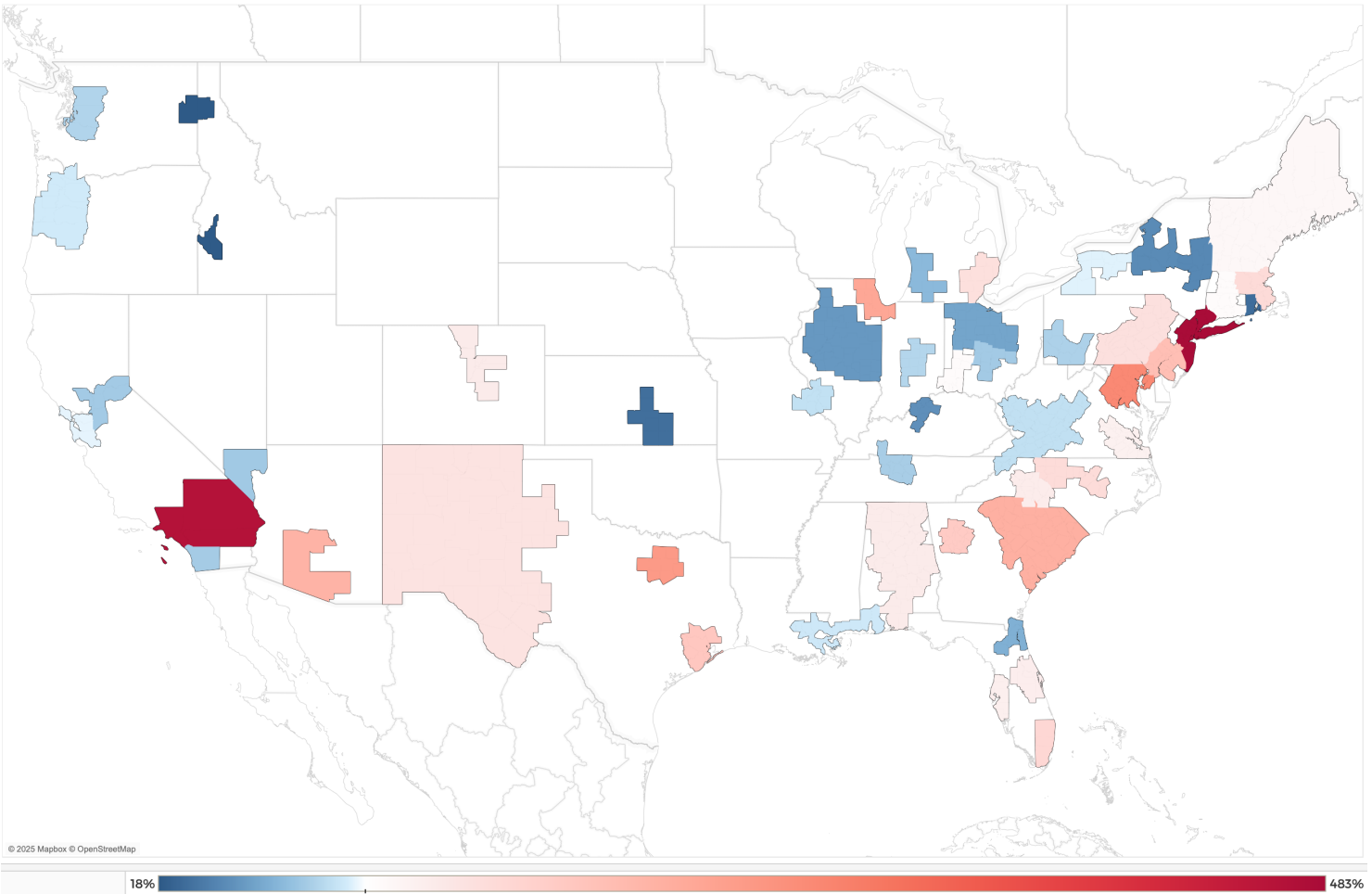
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	236,760,375	54,242,412	59,656,533	350,659,321
California 2024-25	223,468,468	40,463,857	64,081,727	328,014,051
Percent Growth	-5.6%	-25.4%	7.4%	-6.5%
2024-25 % of Total	68.1%	12.3%	19.5%	100.0%
Great Lakes 2023-24	417,641,721	35,623,750	44,477,335	497,742,807
Great Lakes 2024-25	410,818,027	36,025,631	49,197,864	496,041,522
Percent Growth	-1.6%	1.1%	10.6%	-0.3%
2024-25 % of Total	82.8%	7.3%	9.9%	100.0%
Midsouth 2023-24	419,433,777	54,634,260	41,501,433	515,569,470
Midsouth 2024-25	417,753,305	52,512,338	42,171,516	512,437,159
Percent Growth	-0.4%	-3.9%	1.6%	-0.6%
2024-25 % of Total	81.5%	10.2%	8.2%	100.0%
Northeast 2023-24	459,220,254	94,093,540	42,933,183	596,246,978
Northeast 2024-25	454,134,316	80,950,798	44,259,411	579,344,525
Percent Growth	-1.1%	-14.0%	3.1%	-2.8%
2024-25 % of Total	78.4%	14.0%	7.6%	100.0%
Plains 2023-24	230,130,137	16,341,153	12,077,868	258,549,158
Plains 2024-25	237,023,524	19,356,052	12,880,735	269,260,311
Percent Growth	3.0%	18.4%	6.6%	4.1%
2024-25 % of Total	88.0%	7.2%	4.8%	100.0%
Southcentral 2023-24	323,815,897	87,268,459	27,133,085	438,217,441
Southcentral 2024-25	331,227,626	47,297,642	26,523,440	405,048,708
Percent Growth	2.3%	-45.8%	-2.2%	-7.6%
2024-25 % of Total	81.8%	11.7%	6.5%	100.0%
Southeast 2023-24	361,951,192	104,418,771	44,754,807	511,124,770
Southeast 2024-25	353,700,415	105,632,582	42,596,553	501,929,549
Percent Growth	-2.3%	1.2%	-4.8%	-1.8%
2024-25 % of Total	70.5%	21.0%	8.5%	100.0%
West 2023-24	285,263,296	55,275,686	55,100,032	395,639,013
West 2024-25	304,596,873	34,338,037	52,144,847	391,079,757
Percent Growth	6.8%	-37.9%	-5.4%	-1.2%
2024-25 % of Total	77.9%	8.8%	13.3%	100.0%

Number of Households per Market



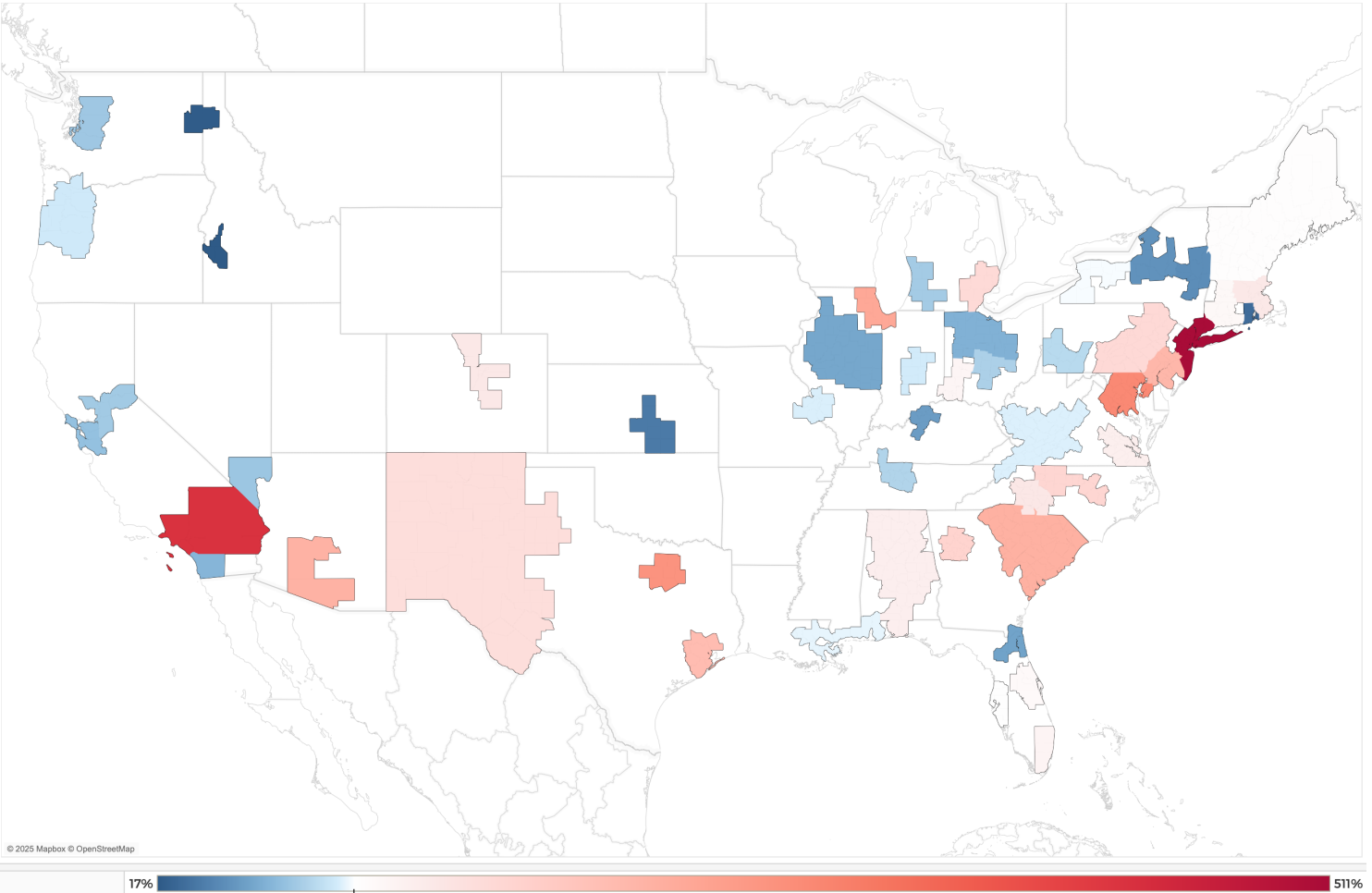
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



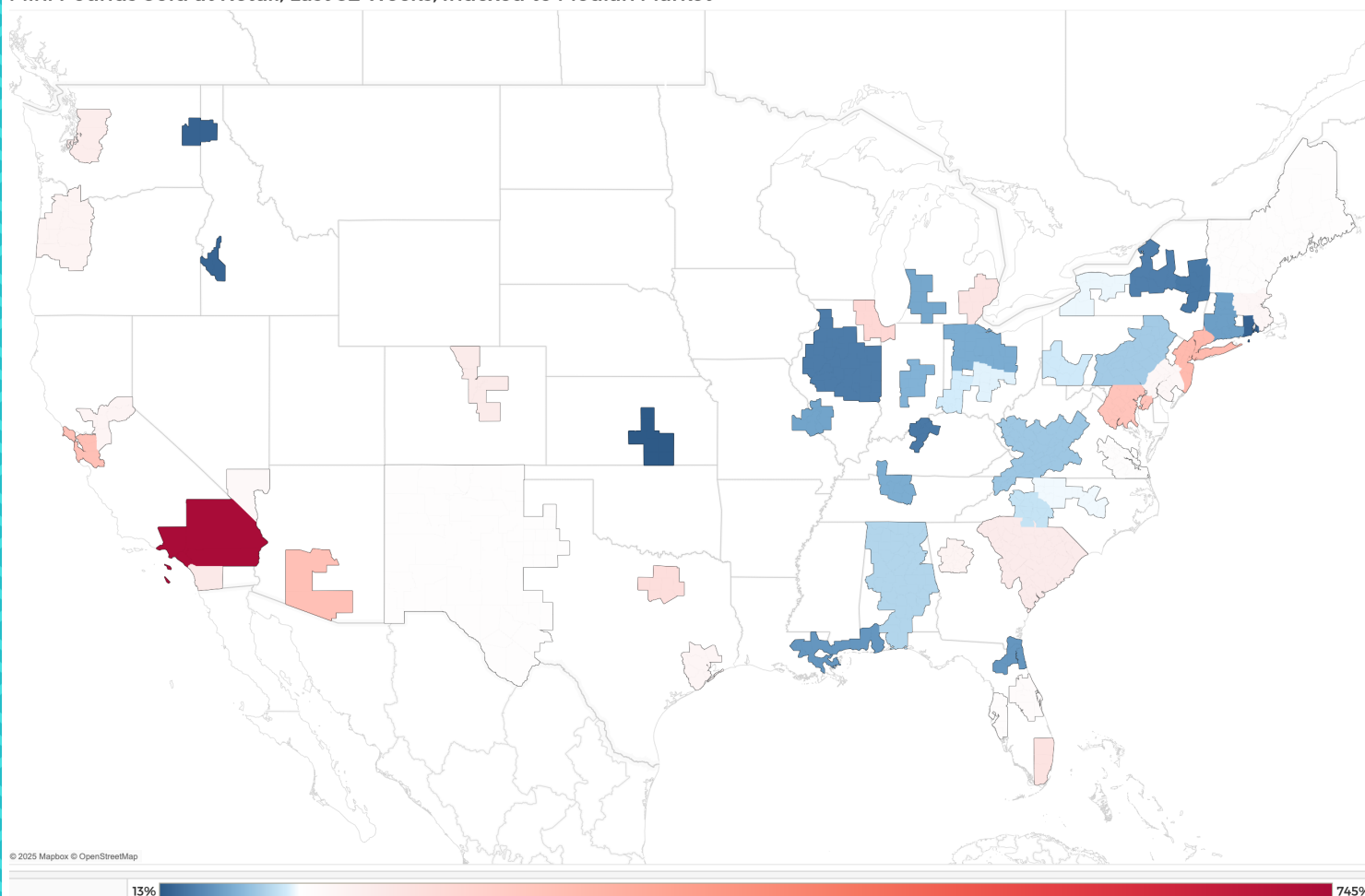
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,799,069	33,606,234	5.7%	SACRAMENTO	27,268,976	26,809,083	-1.7%
GRAND RAPIDS	22,594,733	23,600,589	4.5%	TAMPA	43,923,210	43,135,914	-1.8%
HARRISBURG/SCRANTON	48,782,222	50,708,552	3.9%	LOUISVILLE	16,622,522	16,309,500	-1.9%
SYRACUSE	14,829,526	15,401,604	3.9%	PITTSBURGH	28,756,089	28,105,832	-2.3%
WEST TEX/NEW MEXICO	47,774,048	49,385,267	3.4%	PHOENIX/TUCSON	77,806,934	75,850,182	-2.5%
RALEIGH/GREENSBORO	51,392,127	53,055,748	3.2%	LAS VEGAS	27,233,879	26,535,725	-2.6%
CHARLOTTE	43,273,250	44,659,822	3.2%	BIRMINGHAM/MONTGOMERY	46,466,431	45,086,839	-3.0%
DENVER	44,134,052	45,206,203	2.4%	HARTFORD/SPRINGFIELD	38,358,076	37,174,936	-3.1%
DETROIT	50,115,002	51,169,011	2.1%	PHILADELPHIA	72,359,176	69,386,608	-4.1%
INDIANAPOLIS	28,339,965	28,930,781	2.1%	ATLANTA	65,182,920	62,487,164	-4.1%
TOLEDO	19,773,692	20,077,436	1.5%	NEW YORK	180,159,724	171,342,091	-4.9%
WICHITA	10,103,717	10,246,596	1.4%	NEW ORLEANS/MOBILE	33,943,805	32,190,220	-5.2%
CINCINNATI/DAYTON	36,451,407	36,958,570	1.4%	BALTIMORE/WASHINGTON	104,802,953	98,847,355	-5.7%
ALBANY	14,680,395	14,858,924	1.2%	SPOKANE	6,696,060	6,302,164	-5.9%
SOUTH CAROLINA	76,590,321	77,365,936	1.0%	NEW ENGLAND	41,444,129	39,002,806	-5.9%
ORLANDO	43,580,507	43,981,629	0.9%	PROVIDENCE	10,607,143	9,960,407	-6.1%
HOUSTON	64,165,040	64,749,035	0.9%	LOS ANGELES	176,773,273	165,301,777	-6.5%
JACKSONVILLE	21,854,482	21,948,098	0.4%	DALLAS/FT. WORTH	96,033,888	89,623,606	-6.7%
PEORIA/SPRINGFIELD	17,820,992	17,860,364	0.2%	BOSTON	58,021,944	53,595,520	-7.6%
COLUMBUS	26,937,533	26,832,134	-0.4%	CHICAGO	89,818,598	82,509,846	-8.1%
PORTLAND	32,593,655	32,424,484	-0.5%	MIAMI/FT. LAUDERDALE	60,692,040	55,714,831	-8.2%
ST. LOUIS	30,904,896	30,742,816	-0.5%	SAN DIEGO	30,106,732	27,022,701	-10.2%
NASHVILLE	27,623,137	27,416,247	-0.7%	SAN FRANCISCO	38,006,469	33,947,096	-10.7%
RICHMOND/NORFOLK	42,683,470	42,299,437	-0.9%	BOISE	7,302,842	6,484,750	-11.2%
ROANOKE	31,045,070	30,586,248	-1.5%	SEATTLE	32,200,148	28,587,709	-11.2%

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



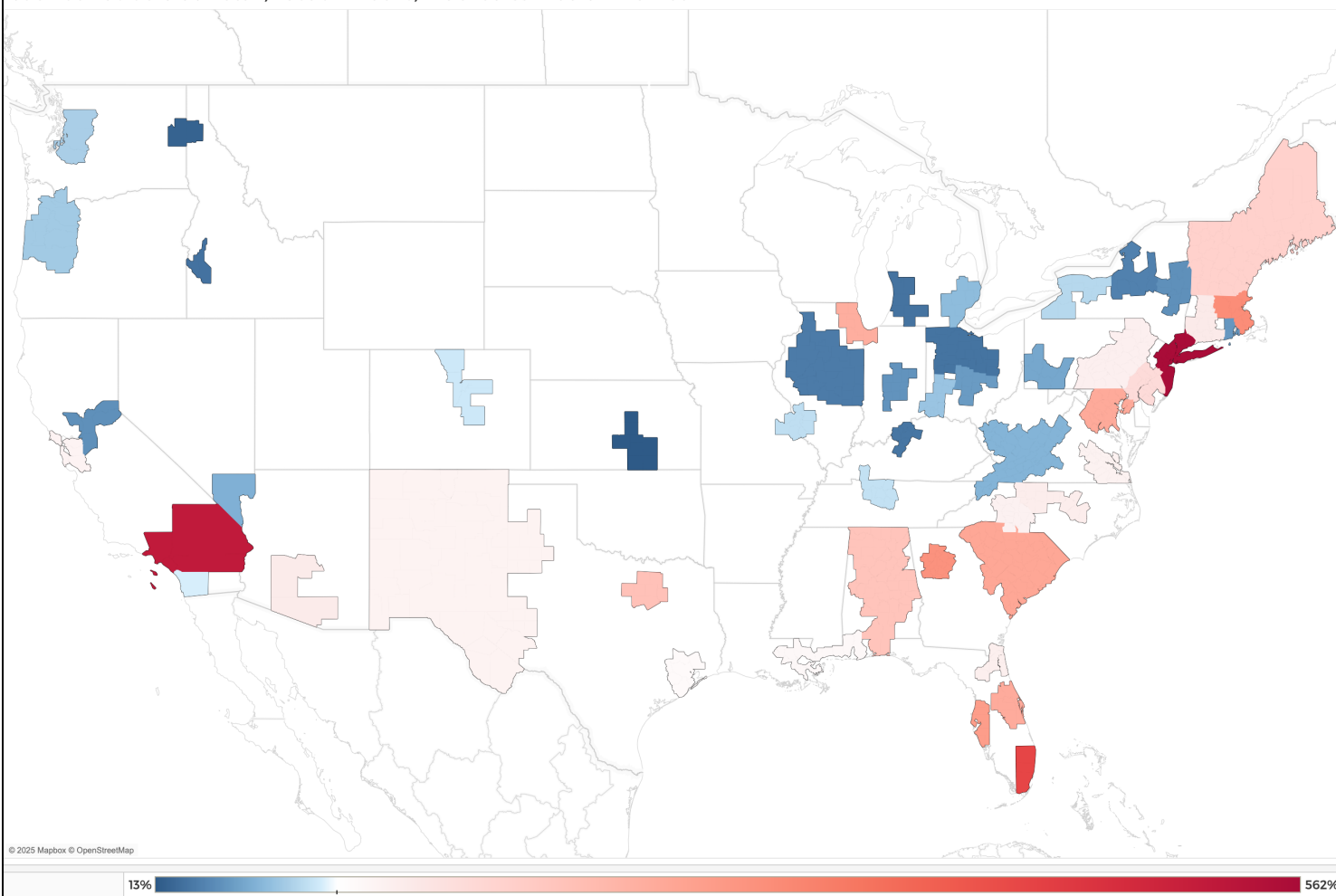
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,799,069	33,606,234	5.7%	SACRAMENTO	27,268,976	26,809,083	-1.7%
GRAND RAPIDS	22,594,733	23,600,589	4.5%	TAMPA	43,923,210	43,135,914	-1.8%
HARRISBURG/SCRANTON	48,782,222	50,708,552	3.9%	LOUISVILLE	16,622,522	16,309,500	-1.9%
SYRACUSE	14,829,526	15,401,604	3.9%	PITTSBURGH	28,756,089	28,105,832	-2.3%
WEST TEX/NEW MEXICO	47,774,048	49,385,267	3.4%	PHOENIX/TUCSON	77,806,934	75,850,182	-2.5%
RALEIGH/GREENSBORO	51,392,127	53,055,748	3.2%	LAS VEGAS	27,233,879	26,535,725	-2.6%
CHARLOTTE	43,273,250	44,659,822	3.2%	BIRMINGHAM/MONTGOMERY	46,466,431	45,086,839	-3.0%
DENVER	44,134,052	45,206,203	2.4%	HARTFORD/SPRINGFIELD	38,358,076	37,174,936	-3.1%
DETROIT	50,115,002	51,169,011	2.1%	PHILADELPHIA	72,359,176	69,386,608	-4.1%
INDIANAPOLIS	28,339,965	28,930,781	2.1%	ATLANTA	65,182,920	62,487,164	-4.1%
TOLEDO	19,773,692	20,077,436	1.5%	NEW YORK	180,159,724	171,342,091	-4.9%
WICHITA	10,103,717	10,246,596	1.4%	NEW ORLEANS/MOBILE	33,943,805	32,190,220	-5.2%
CINCINNATI/DAYTON	36,451,407	36,958,570	1.4%	BALTIMORE/WASHINGTON	104,802,953	98,847,355	-5.7%
ALBANY	14,680,395	14,858,924	1.2%	SPOKANE	6,696,060	6,302,164	-5.9%
SOUTH CAROLINA	76,590,321	77,365,936	1.0%	NEW ENGLAND	41,444,129	39,002,806	-5.9%
ORLANDO	43,580,507	43,981,629	0.9%	PROVIDENCE	10,607,143	9,960,407	-6.1%
HOUSTON	64,165,040	64,749,035	0.9%	LOS ANGELES	176,773,273	165,301,777	-6.5%
JACKSONVILLE	21,854,482	21,948,098	0.4%	DALLAS/FT. WORTH	96,033,888	89,623,606	-6.7%
PEORIA/SPRINGFIELD	17,820,992	17,860,364	0.2%	BOSTON	58,021,944	53,595,520	-7.6%
COLUMBUS	26,937,533	26,832,134	-0.4%	CHICAGO	89,818,598	82,509,846	-8.1%
PORTLAND	32,593,655	32,424,484	-0.5%	MIAMI/FT. LAUDERDALE	60,692,040	55,714,831	-8.2%
ST. LOUIS	30,904,896	30,742,816	-0.5%	SAN DIEGO	30,106,732	27,022,701	-10.2%
NASHVILLE	27,623,137	27,416,247	-0.7%	SAN FRANCISCO	38,006,469	33,947,096	-10.7%
RICHMOND/NORFOLK	42,683,470	42,299,437	-0.9%	BOISE	7,302,842	6,484,750	-11.2%
ROANOKE	31,045,070	30,586,248	-1.5%	SEATTLE	32,200,148	28,587,709	-11.2%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
ST. LOUIS	1,527,374	2,116,978	38.6%	TOLEDO	2,257,592	2,277,403	0.9%
CHICAGO	5,614,999	7,629,161	35.9%	HARRISBURG/SCRANTON	2,915,313	2,937,072	0.7%
BUFFALO/ROCHESTER	3,256,141	3,812,922	17.1%	NEW YORK	10,737,947	10,808,333	0.7%
LOUISVILLE	1,054,821	1,215,347	15.2%	NEW ORLEANS/MOBILE	1,841,264	1,839,488	-0.1%
PEORIA/SPRINGFIELD	1,134,416	1,275,962	12.5%	PORTLAND	4,956,339	4,933,693	-0.5%
PROVIDENCE	666,840	739,417	10.9%	WEST TEX/NEW MEXICO	4,068,068	4,048,176	-0.5%
ROANOKE	2,610,913	2,860,371	9.6%	BOISE	782,859	773,637	-1.2%
SAN DIEGO	5,432,099	5,939,433	9.3%	RALEIGH/GREENSBORO	3,922,671	3,844,373	-2.0%
SPOKANE	673,616	736,057	9.3%	NEW ENGLAND	4,185,543	4,084,383	-2.4%
PITTSBURGH	3,303,019	3,580,470	8.4%	SOUTH CAROLINA	5,873,245	5,713,207	-2.7%
CINCINNATI/DAYTON	3,364,755	3,638,505	8.1%	NASHVILLE	2,365,762	2,296,173	-2.9%
SAN FRANCISCO	9,460,692	10,226,915	8.1%	SEATTLE	5,824,122	5,592,907	-4.0%
PHILADELPHIA	4,351,268	4,644,650	6.7%	ORLANDO	4,493,952	4,267,442	-5.0%
JACKSONVILLE	1,738,894	1,846,340	6.2%	RICHMOND/NORFOLK	4,318,300	4,067,282	-5.8%
LOS ANGELES	27,731,952	29,393,546	6.0%	BIRMINGHAM/MONTGOMERY	3,354,916	3,153,121	-6.0%
SYRACUSE	1,278,029	1,340,929	4.9%	TAMPA	4,474,399	4,161,807	-7.0%
SACRAMENTO	4,661,804	4,888,182	4.9%	LAS VEGAS	4,918,352	4,532,454	-7.8%
COLUMBUS	3,576,221	3,733,341	4.4%	ATLANTA	5,417,710	4,963,610	-8.4%
CHARLOTTE	3,322,609	3,440,920	3.6%	PHOENIX/TUCSON	11,220,411	10,205,087	-9.0%
DETROIT	6,088,916	6,296,918	3.4%	DALLAS/FT. WORTH	7,782,115	7,014,767	-9.9%
ALBANY	1,159,303	1,194,852	3.1%	MIAMI/FT. LAUDERDALE	7,329,544	6,570,247	-10.4%
INDIANAPOLIS	2,351,948	2,406,510	2.3%	HARTFORD/SPRINGFIELD	2,262,274	2,013,972	-11.0%
BOSTON	4,611,307	4,699,492	1.9%	HOUSTON	5,475,066	4,829,765	-11.8%
GRAND RAPIDS	2,152,417	2,174,317	1.0%	DENVER	6,690,156	5,729,233	-14.4%
BALTIMORE/WASHINGTON	9,716,198	9,810,962	1.0%	WICHITA	624,085	527,710	-15.4%

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	2,967,413	3,615,639	21.8%	PITTSBURGH	2,371,307	2,356,624	-0.6%
TOLEDO	1,016,065	1,178,827	16.0%	MIAMI/FT. LAUDERDALE	18,740,983	18,344,117	-2.1%
INDIANAPOLIS	1,691,678	1,919,033	13.4%	TAMPA	12,169,606	11,906,103	-2.2%
PEORIA/SPRINGFIELD	1,195,012	1,351,307	13.1%	ATLANTA	13,328,638	12,756,746	-4.3%
SACRAMENTO	1,648,333	1,839,920	11.6%	HARTFORD/SPRINGFIELD	6,106,329	5,724,887	-6.2%
BUFFALO/ROCHESTER	3,162,267	3,474,174	9.9%	NEW YORK	26,271,966	23,998,582	-8.7%
SYRACUSE	1,367,915	1,495,694	9.3%	WEST TEX/NEW MEXICO	5,652,601	5,103,014	-9.7%
ROANOKE	2,415,999	2,637,997	9.2%	CHICAGO	11,930,070	10,518,786	-11.8%
ALBANY	1,727,793	1,841,984	6.6%	NEW ORLEANS/MOBILE	5,387,484	4,748,280	-11.9%
RICHMOND/NORFOLK	4,902,935	5,185,556	5.8%	NEW ENGLAND	9,494,450	7,764,246	-18.2%
CHARLOTTE	4,953,224	5,233,733	5.7%	PROVIDENCE	2,683,257	2,013,612	-25.0%
LOUISVILLE	1,159,263	1,224,805	5.7%	BALTIMORE/WASHINGTON	14,616,879	10,851,647	-25.8%
COLUMBUS	2,005,311	2,096,439	4.5%	DENVER	5,249,871	3,845,027	-26.8%
ORLANDO	10,310,130	10,748,648	4.3%	HOUSTON	6,365,397	4,572,083	-28.2%
BIRMINGHAM/MONTGOMERY	8,464,131	8,799,430	4.0%	BOSTON	18,453,798	13,182,942	-28.6%
NASHVILLE	3,569,755	3,689,694	3.4%	LOS ANGELES	31,081,483	22,145,810	-28.7%
DETROIT	2,740,295	2,820,690	2.9%	PHILADELPHIA	10,001,626	6,885,636	-31.2%
SOUTH CAROLINA	10,791,935	11,100,301	2.9%	PHOENIX/TUCSON	8,238,014	5,667,703	-31.2%
SAN FRANCISCO	4,926,990	5,066,541	2.8%	LAS VEGAS	4,133,726	2,559,967	-38.1%
WICHITA	550,046	563,196	2.4%	PORTLAND	5,376,270	3,160,997	-41.2%
CINCINNATI/DAYTON	2,968,309	3,025,914	1.9%	DALLAS/FT. WORTH	15,791,753	9,005,421	-43.0%
GRAND RAPIDS	1,145,793	1,164,765	1.7%	SAN DIEGO	6,983,074	3,969,378	-43.2%
RALEIGH/GREENSBORO	5,458,371	5,514,783	1.0%	BOISE	2,066,624	1,144,301	-44.6%
JACKSONVILLE	5,355,027	5,385,081	0.6%	SPOKANE	1,614,738	776,638	-51.9%
HARRISBURG/SCRANTON	5,397,855	5,366,267	-0.6%	SEATTLE	6,873,728	3,277,759	-52.3%