



Retail Scan Data

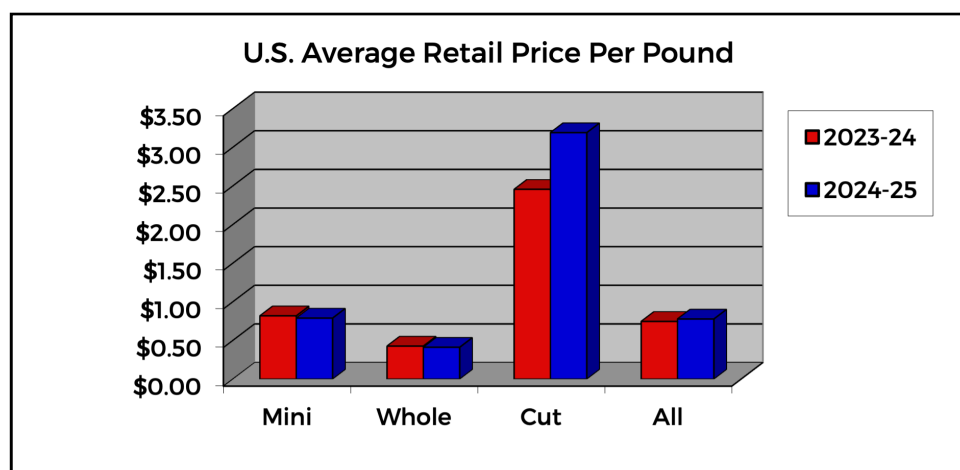
Compiled by the National Watermelon Promotion Board



Data current through
December 28, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	326,492,397	335,695,952	2.8%	9.5%
Whole	2,726,371,525	2,766,823,385	1.5%	78.6%
Cut	496,176,378	418,705,667	-15.6%	11.9%
Total	3,549,040,299	3,521,225,003	-0.8%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.82	\$0.79
Whole	\$0.43	\$0.41
Cut	\$2.46	\$3.19
All	\$0.75	\$0.78



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.49	\$2.23	\$0.95
California 2024-25	\$0.48	\$3.05	\$0.86
Great Lakes 2023-24	\$0.43	\$3.44	\$0.67
Great Lakes 2024-25	\$0.40	\$3.74	\$0.64
Midsouth 2023-24	\$0.39	\$2.91	\$0.74
Midsouth 2024-25	\$0.39	\$3.29	\$0.72
Northeast 2023-24	\$0.41	\$2.13	\$0.93
Northeast 2024-25	\$0.40	\$2.51	\$0.87
Plains 2023-24	\$0.40	\$2.91	\$0.87
Plains 2024-25	\$0.39	\$3.23	\$0.83
Southcentral 2023-24	\$0.43	\$1.88	\$0.78
Southcentral 2024-25	\$0.41	\$3.52	\$0.80
Southeast 2023-24	\$0.44	\$2.88	\$0.84
Southeast 2024-25	\$0.42	\$3.24	\$0.82
West 2023-24	\$0.44	\$2.11	\$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 December 28, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

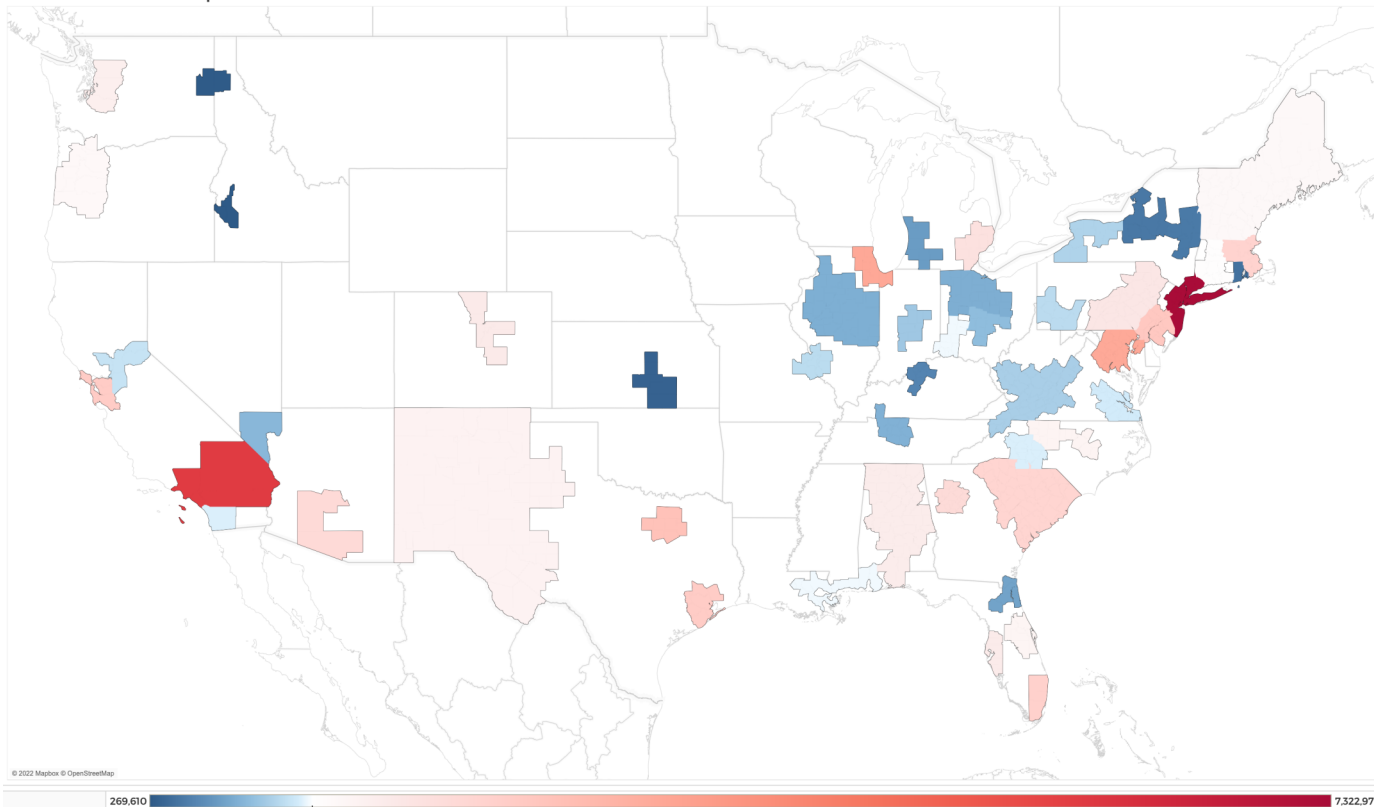
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Scanner Data Regions



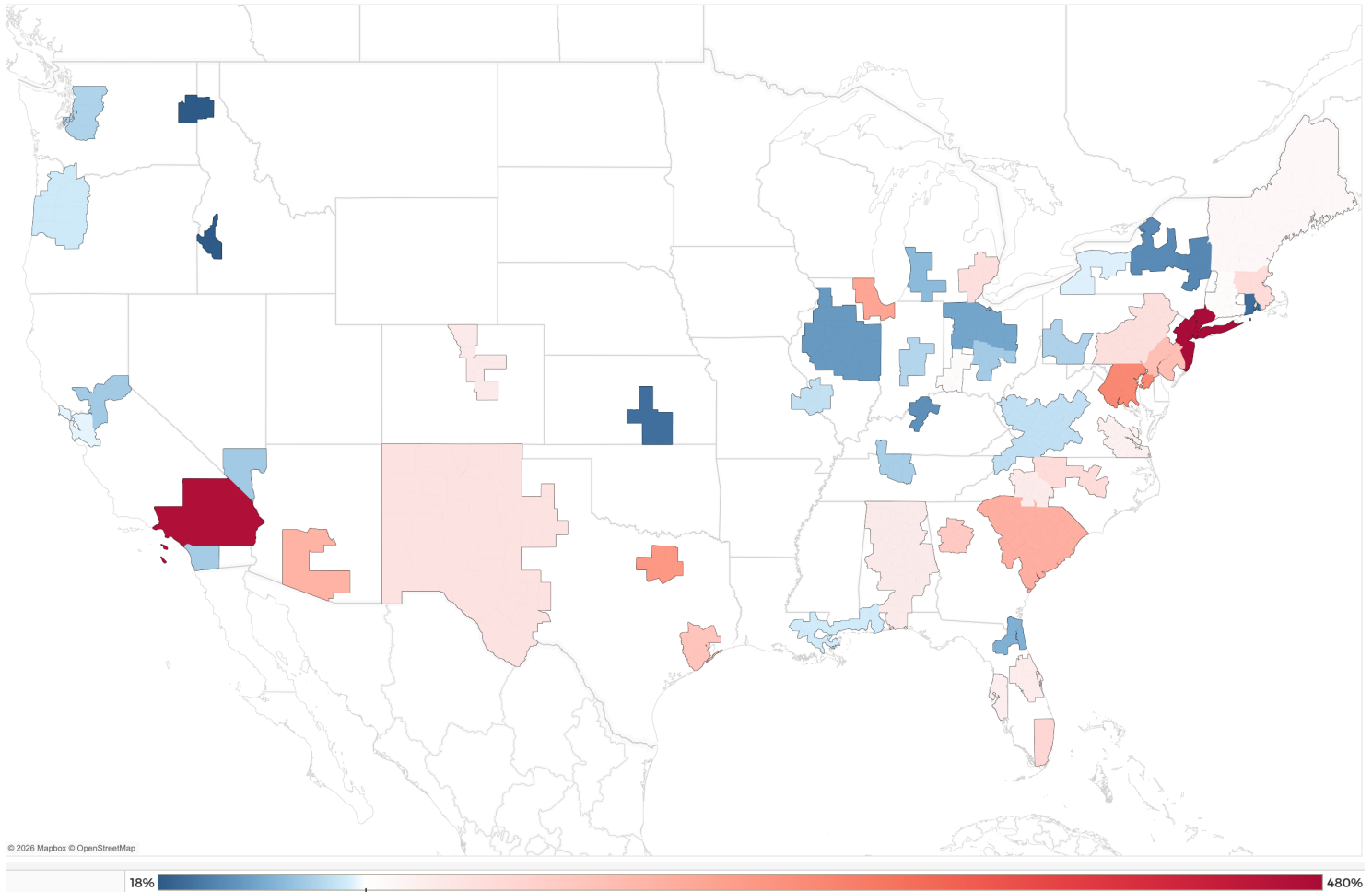
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	235,937,181	53,287,151	59,282,725	348,507,057
California 2024-25	227,458,478	40,542,840	64,437,371	332,438,689
Percent Growth	-3.6%	-23.9%	8.7%	-4.6%
2024-25 % of Total	68.4%	12.2%	19.4%	100.0%
Great Lakes 2023-24	416,651,741	35,304,895	44,247,223	496,203,860
Great Lakes 2024-25	415,205,102	36,495,549	49,567,075	501,268,726
Percent Growth	-0.3%	3.4%	12.0%	1.0%
2024-25 % of Total	82.8%	7.3%	9.9%	100.0%
Midsouth 2023-24	418,646,083	54,205,241	41,555,540	514,406,864
Midsouth 2024-25	422,073,929	52,802,541	42,227,609	517,104,079
Percent Growth	0.8%	-2.6%	1.6%	0.5%
2024-25 % of Total	81.6%	10.2%	8.2%	100.0%
Northeast 2023-24	458,392,821	93,206,864	42,562,110	594,161,794
Northeast 2024-25	456,338,056	81,038,801	44,523,504	581,900,362
Percent Growth	-0.4%	-13.1%	4.6%	-2.1%
2024-25 % of Total	78.4%	13.9%	7.7%	100.0%
Plains 2023-24	229,460,009	16,288,111	11,988,748	257,736,869
Plains 2024-25	240,065,132	19,662,809	12,840,014	272,567,955
Percent Growth	4.6%	20.7%	7.1%	5.8%
2024-25 % of Total	88.1%	7.2%	4.7%	100.0%
Southcentral 2023-24	322,351,537	85,831,518	26,993,858	435,176,913
Southcentral 2024-25	338,660,370	47,529,271	26,603,811	412,793,452
Percent Growth	5.1%	-44.6%	-1.4%	-5.1%
2024-25 % of Total	82.0%	11.5%	6.4%	100.0%
Southeast 2023-24	360,644,429	104,163,180	44,916,647	509,724,256
Southeast 2024-25	359,397,426	105,825,614	43,107,658	508,330,698
Percent Growth	-0.3%	1.6%	-4.0%	-0.3%
2024-25 % of Total	70.7%	20.8%	8.5%	100.0%
West 2023-24	284,287,723	53,889,417	54,945,546	393,122,687
West 2024-25	307,624,892	34,807,241	52,388,908	394,821,041
Percent Growth	8.2%	-35.4%	-4.7%	0.4%
2024-25 % of Total	77.9%	8.8%	13.3%	100.0%

Number of Households per Market



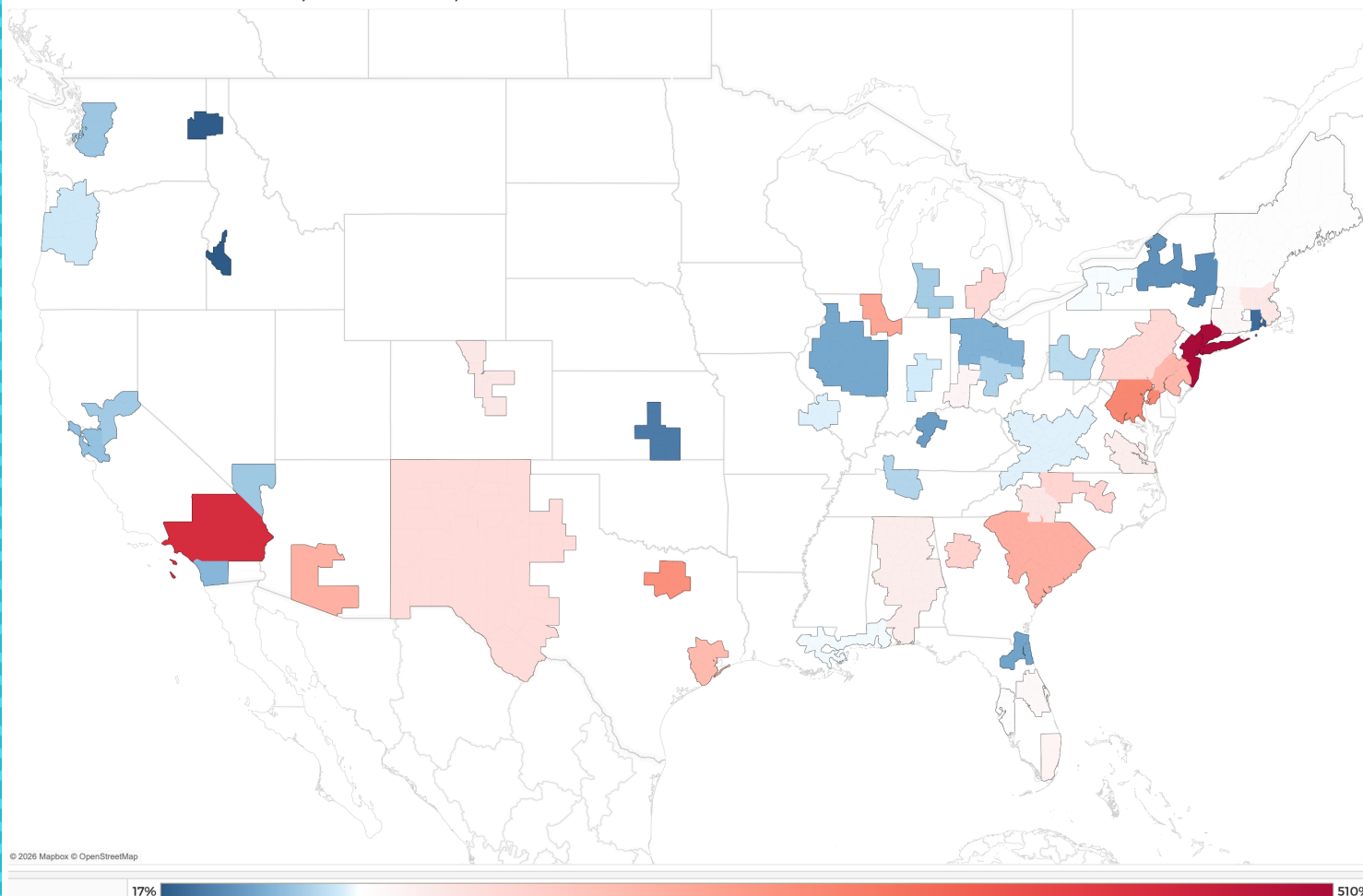
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



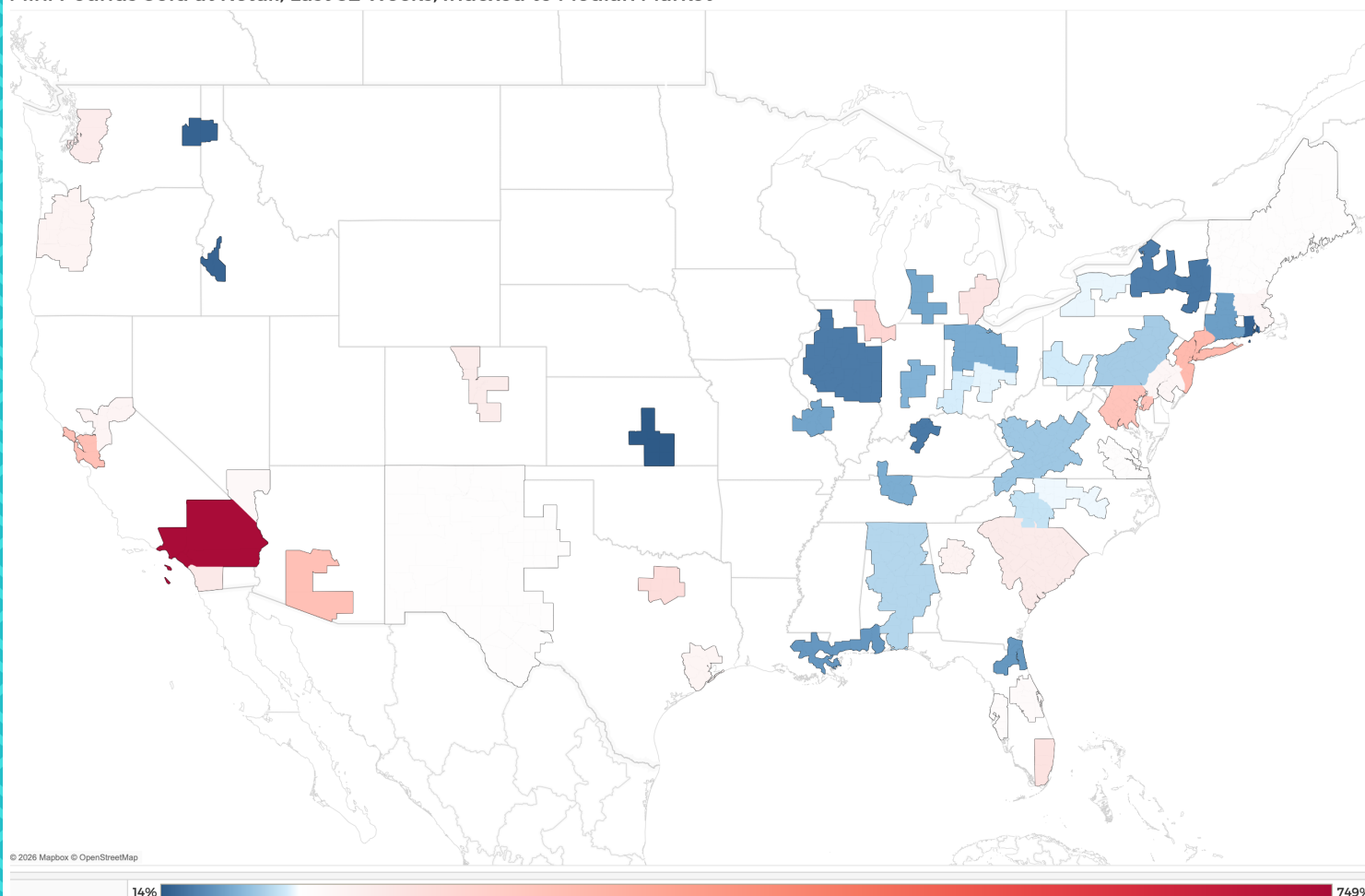
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
BUFFALO/ROCHESTER	31,681,166	33,744,085	6.5%	ROANOKE	31,009,194	30,952,630	-0.2%
WEST TEX/NEW MEXICO	47,435,648	50,326,949	6.1%	LOUISVILLE	16,602,898	16,521,601	-0.5%
GRAND RAPIDS	22,551,031	23,828,746	5.7%	TAMPA	43,915,423	43,676,283	-0.5%
HARRISBURG/SCRANTON	48,629,050	51,068,506	5.0%	SACRAMENTO	27,203,833	27,049,953	-0.6%
DENVER	43,820,713	45,901,219	4.7%	PITTSBURGH	28,706,857	28,540,602	-0.6%
RALEIGH/GREENSBORO	51,301,009	53,598,173	4.5%	PHOENIX/TUCSON	77,305,255	76,541,491	-1.0%
SYRACUSE	14,783,944	15,443,498	4.5%	BIRMINGHAM/MONTGOMERY	46,271,432	45,695,246	-1.2%
CHARLOTTE	43,191,818	45,115,910	4.5%	ATLANTA	64,800,155	63,333,547	-2.3%
HOUSTON	63,992,054	66,249,343	3.5%	NEW ORLEANS/MOBILE	33,689,017	32,891,920	-2.4%
WICHITA	10,078,414	10,418,799	3.4%	HARTFORD/SPRINGFIELD	38,247,739	37,273,841	-2.5%
DETROIT	50,015,178	51,641,114	3.3%	PHILADELPHIA	72,054,911	69,719,249	-3.2%
INDIANAPOLIS	28,301,569	29,220,193	3.2%	DALLAS/FT. WORTH	95,394,419	91,260,845	-4.3%
CINCINNATI/DAYTON	36,356,264	37,284,678	2.6%	NEW YORK	179,611,147	171,743,761	-4.4%
ORLANDO	43,547,997	44,657,396	2.5%	LOS ANGELES	175,689,205	167,917,732	-4.4%
SOUTH CAROLINA	76,408,290	78,234,517	2.4%	BALTIMORE/WASHINGTON	104,263,905	99,601,270	-4.5%
TOLEDO	19,750,048	20,211,939	2.3%	NEW ENGLAND	41,269,076	39,168,230	-5.1%
ALBANY	14,649,646	14,931,539	1.9%	SPOKANE	6,659,524	6,320,401	-5.1%
JACKSONVILLE	21,825,583	22,199,451	1.7%	PROVIDENCE	10,547,946	9,965,930	-5.5%
PEORIA/SPRINGFIELD	17,792,660	18,039,129	1.4%	CHICAGO	89,272,615	83,737,194	-6.2%
COLUMBUS	26,851,144	27,199,069	1.3%	BOSTON	57,668,851	53,603,244	-7.0%
ST. LOUIS	30,847,120	31,099,942	0.8%	MIAMI/FT. LAUDERDALE	60,443,319	56,172,146	-7.1%
NASHVILLE	27,575,847	27,773,302	0.7%	SAN DIEGO	29,813,490	27,299,067	-8.4%
PORTLAND	32,430,667	32,515,423	0.3%	SAN FRANCISCO	37,789,687	34,237,049	-9.4%
RICHMOND/NORFOLK	42,600,237	42,703,434	0.2%	BOISE	7,245,322	6,512,814	-10.1%
LAS VEGAS	26,963,971	27,020,962	0.2%	SEATTLE	32,005,597	28,568,021	-10.7%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
DENVER	31,986,733	36,264,858	13.4%	ALBANY	11,770,611	11,881,820	0.9%
LAS VEGAS	18,072,415	19,872,916	10.0%	SEATTLE	19,516,728	19,636,730	0.6%
PORTLAND	22,241,853	24,354,108	9.5%	NASHVILLE	21,645,681	21,763,561	0.5%
SPOKANE	4,406,046	4,798,012	8.9%	PHILADELPHIA	57,923,722	58,140,631	0.4%
WEST TEX/NEW MEXICO	37,779,170	41,097,695	8.8%	RICHMOND/NORFOLK	33,397,643	33,444,565	0.1%
HOUSTON	52,259,278	56,812,793	8.7%	COLUMBUS	21,299,807	21,307,371	0.0%
GRAND RAPIDS	19,285,008	20,488,171	6.2%	PROVIDENCE	7,234,625	7,205,089	-0.4%
HARRISBURG/SCRANTON	40,374,299	42,733,452	5.8%	PEORIA/SPRINGFIELD	15,472,222	15,397,401	-0.5%
RALEIGH/GREENSBORO	41,932,994	44,224,993	5.5%	NEW ORLEANS/MOBILE	26,556,124	26,264,568	-1.1%
BUFFALO/ROCHESTER	25,302,288	26,455,929	4.6%	LOS ANGELES	117,574,318	116,250,940	-1.1%
WICHITA	8,913,568	9,307,186	4.4%	HARTFORD/SPRINGFIELD	29,944,020	29,519,240	-1.4%
CHARLOTTE	34,916,128	36,394,182	4.2%	ATLANTA	46,153,426	45,493,920	-1.4%
PHOENIX/TUCSON	58,129,740	60,538,238	4.1%	SAN DIEGO	17,610,349	17,351,696	-1.5%
DALLAS/FT. WORTH	72,169,698	75,137,847	4.1%	BALTIMORE/WASHINGTON	80,248,114	78,924,300	-1.6%
SYRACUSE	12,152,456	12,603,992	3.7%	NEW ENGLAND	27,724,551	27,263,928	-1.7%
DETROIT	41,214,587	42,513,114	3.2%	ROANOKE	25,972,483	25,437,083	-2.1%
BOISE	4,444,398	4,576,996	3.0%	PITTSBURGH	23,035,641	22,547,172	-2.1%
ORLANDO	28,711,539	29,530,943	2.9%	LOUISVILLE	14,381,857	14,042,898	-2.4%
SOUTH CAROLINA	59,726,908	61,334,630	2.7%	BIRMINGHAM/MONTGOMERY	34,507,839	33,681,257	-2.4%
INDIANAPOLIS	24,264,444	24,862,431	2.5%	SACRAMENTO	20,928,760	20,278,669	-3.1%
BOSTON	34,889,341	35,710,328	2.4%	ST. LOUIS	26,356,919	25,329,359	-3.9%
TOLEDO	16,475,926	16,726,554	1.5%	NEW YORK	142,967,424	136,857,403	-4.3%
CINCINNATI/DAYTON	30,082,054	30,535,984	1.5%	MIAMI/FT. LAUDERDALE	34,411,751	31,258,259	-9.2%
JACKSONVILLE	14,727,675	14,940,139	1.4%	CHICAGO	71,991,308	65,242,520	-9.4%
TAMPA	27,229,370	27,531,622	1.1%	SAN FRANCISCO	23,537,340	18,846,264	-19.9%

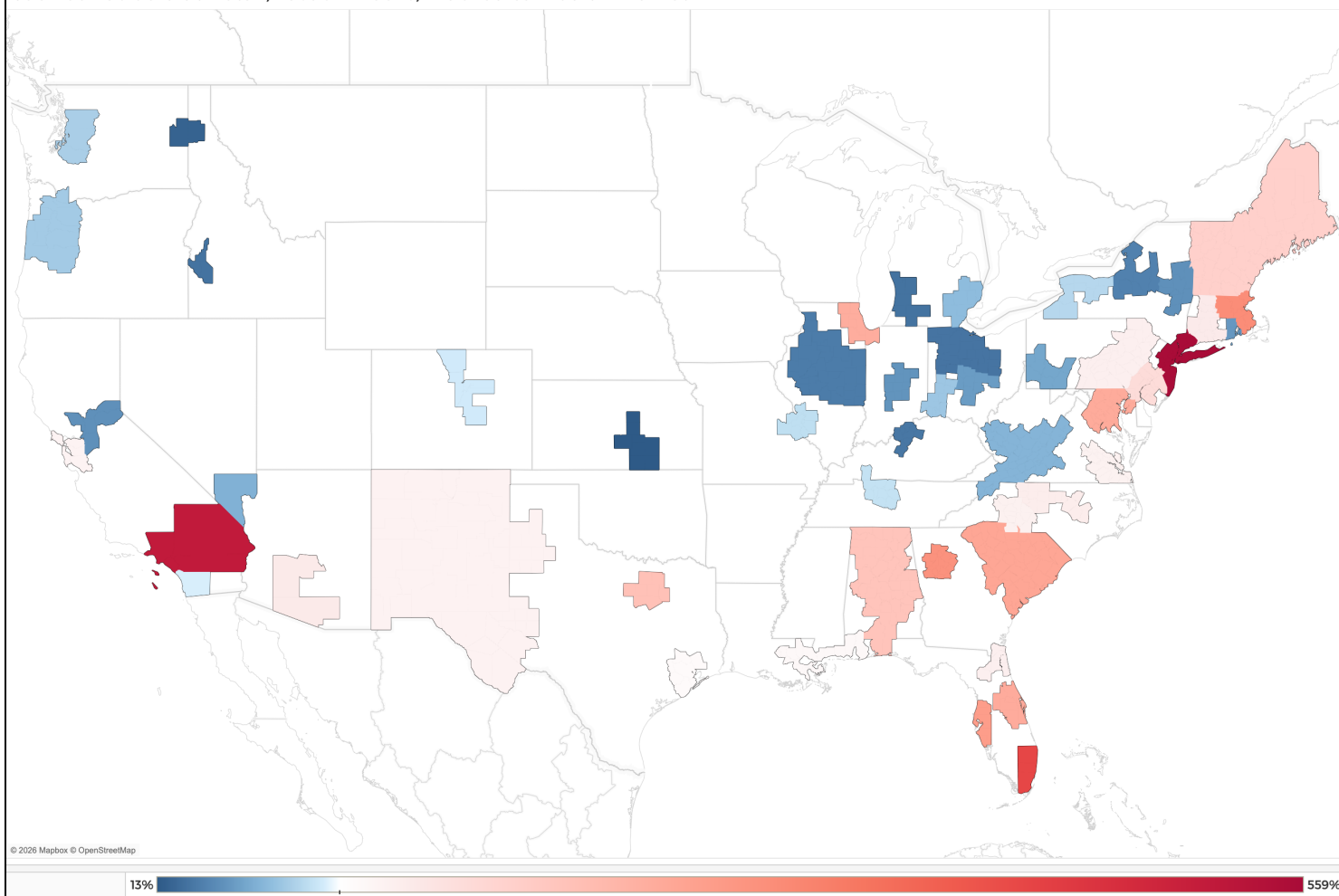
Mini Pounds Sold at Retail, Last 52 Weeks, Indexed to Median Market



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Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	5,549,955	7,873,020	41.9%	BALTIMORE/WASHINGTON	9,608,503	9,849,932	2.5%
ST. LOUIS	1,508,176	2,125,998	41.0%	CHARLOTTE	3,355,235	3,438,688	2.5%
BUFFALO/ROCHESTER	3,220,305	3,800,632	18.0%	NEW YORK	10,644,724	10,902,735	2.4%
LOUISVILLE	1,077,734	1,225,908	13.7%	TOLEDO	2,263,009	2,285,172	1.0%
PEORIA/SPRINGFIELD	1,125,714	1,269,361	12.8%	PORTLAND	4,940,027	4,966,353	0.5%
PROVIDENCE	661,868	741,955	12.1%	WEST TEX/NEW MEXICO	4,067,735	4,063,389	-0.1%
SAN DIEGO	5,404,685	5,957,067	10.2%	BOISE	781,801	776,010	-0.7%
PITTSBURGH	3,298,493	3,634,441	10.2%	NEW ENGLAND	4,153,577	4,085,076	-1.6%
SPOKANE	672,740	741,234	10.2%	RALEIGH/GREENSBORO	3,930,471	3,831,592	-2.5%
SAN FRANCISCO	9,347,163	10,288,603	10.1%	SEATTLE	5,811,637	5,634,213	-3.1%
PHILADELPHIA	4,297,805	4,723,206	9.9%	SOUTH CAROLINA	5,942,803	5,752,553	-3.2%
ROANOKE	2,622,296	2,856,330	8.9%	NASHVILLE	2,379,700	2,298,247	-3.4%
CINCINNATI/DAYTON	3,363,404	3,661,150	8.9%	ORLANDO	4,537,642	4,370,873	-3.7%
JACKSONVILLE	1,749,890	1,880,876	7.5%	BIRMINGHAM/MONTGOMERY	3,318,648	3,188,807	-3.9%
LOS ANGELES	27,616,782	29,567,010	7.1%	RICHMOND/NORFOLK	4,326,354	4,063,991	-6.1%
SACRAMENTO	4,634,516	4,913,378	6.0%	TAMPA	4,514,570	4,228,637	-6.3%
COLUMBUS	3,563,227	3,767,342	5.7%	ATLANTA	5,419,082	5,039,463	-7.0%
SYRACUSE	1,264,909	1,334,283	5.5%	LAS VEGAS	4,899,538	4,549,223	-7.1%
DETROIT	6,064,784	6,286,434	3.7%	PHOENIX/TUCSON	11,166,270	10,245,169	-8.2%
HARRISBURG/SCRANTON	2,863,813	2,968,020	3.6%	DALLAS/FT. WORTH	7,706,376	7,063,065	-8.3%
ALBANY	1,154,279	1,190,830	3.2%	HARTFORD/SPRINGFIELD	2,226,510	2,024,726	-9.1%
NEW ORLEANS/MOBILE	1,809,303	1,862,739	3.0%	MIAMI/FT. LAUDERDALE	7,322,396	6,585,373	-10.1%
BOSTON	4,586,353	4,705,972	2.6%	HOUSTON	5,432,897	4,845,787	-10.8%
INDIANAPOLIS	2,351,272	2,412,234	2.6%	WICHITA	617,726	539,873	-12.6%
GRAND RAPIDS	2,120,307	2,174,357	2.5%	DENVER	6,694,218	5,714,938	-14.6%

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	2,982,025	3,644,585	22.2%	PITTSBURGH	2,372,722	2,358,988	-0.6%
TOLEDO	1,011,112	1,200,213	18.7%	MIAMI/FT. LAUDERDALE	18,709,172	18,328,513	-2.0%
INDIANAPOLIS	1,685,853	1,945,528	15.4%	TAMPA	12,171,482	11,916,024	-2.1%
PEORIA/SPRINGFIELD	1,194,724	1,372,368	14.9%	ATLANTA	13,227,648	12,800,163	-3.2%
SACRAMENTO	1,640,558	1,857,906	13.2%	HARTFORD/SPRINGFIELD	6,077,209	5,729,875	-5.7%
BUFFALO/ROCHESTER	3,158,573	3,487,524	10.4%	WEST TEX/NEW MEXICO	5,588,742	5,165,864	-7.6%
SYRACUSE	1,366,578	1,505,223	10.1%	NEW YORK	25,998,998	23,983,624	-7.8%
ROANOKE	2,414,414	2,659,217	10.1%	CHICAGO	11,731,352	10,621,653	-9.5%
LOUISVILLE	1,143,307	1,252,795	9.6%	NEW ORLEANS/MOBILE	5,323,591	4,764,613	-10.5%
ALBANY	1,724,756	1,858,890	7.8%	NEW ENGLAND	9,390,948	7,819,226	-16.7%
CHARLOTTE	4,920,455	5,283,040	7.4%	DENVER	5,139,763	3,921,424	-23.7%
COLUMBUS	1,988,110	2,124,357	6.9%	PROVIDENCE	2,651,452	2,018,887	-23.9%
RICHMOND/NORFOLK	4,876,240	5,194,878	6.5%	BALTIMORE/WASHINGTON	14,407,288	10,827,039	-24.9%
CINCINNATI/DAYTON	2,910,805	3,087,544	6.1%	HOUSTON	6,299,879	4,590,763	-27.1%
NASHVILLE	3,550,466	3,711,493	4.5%	BOSTON	18,193,157	13,186,945	-27.5%
BIRMINGHAM/MONTGOMERY	8,444,945	8,825,181	4.5%	LOS ANGELES	30,498,106	22,099,783	-27.5%
WICHITA	547,120	571,740	4.5%	PHOENIX/TUCSON	8,009,245	5,758,083	-28.1%
ORLANDO	10,298,815	10,755,580	4.4%	PHILADELPHIA	9,833,384	6,855,412	-30.3%
SAN FRANCISCO	4,905,185	5,102,182	4.0%	LAS VEGAS	3,992,019	2,598,823	-34.9%
DETROIT	2,735,807	2,841,566	3.9%	PORTLAND	5,248,788	3,194,961	-39.1%
SOUTH CAROLINA	10,738,579	11,147,335	3.8%	SAN DIEGO	6,798,457	3,990,303	-41.3%
RALEIGH/GREENSBORO	5,437,544	5,541,588	1.9%	DALLAS/FT. WORTH	15,518,344	9,059,932	-41.6%
GRAND RAPIDS	1,145,716	1,166,218	1.8%	BOISE	2,019,123	1,159,808	-42.6%
JACKSONVILLE	5,348,018	5,378,436	0.6%	SPOKANE	1,580,739	781,155	-50.6%
HARRISBURG/SCRANTON	5,390,937	5,367,034	-0.4%	SEATTLE	6,677,232	3,297,079	-50.6%