

Retail Scan Data

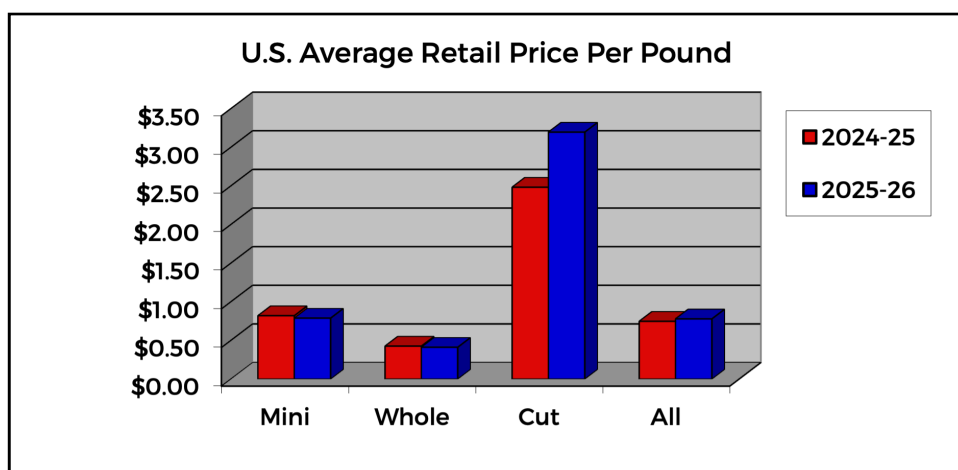
Compiled by the National Watermelon Promotion Board



Data current through
January 25, 2026

Retail Sales in Pounds				
Category	2024-25	2025-26	% Change	2025-26 Sales Share
Mini	324,809,083	336,741,038	3.7%	9.5%
Whole	2,720,850,707	2,770,755,293	1.8%	78.5%
Cut	490,557,603	420,621,401	-14.3%	11.9%
Total	3,536,217,393	3,528,117,732	-0.2%	100.0%

Retail Price per Pound		
Category	2024-25	2025-26
Mini	\$0.82	\$0.79
Whole	\$0.43	\$0.41
Cut	\$2.48	\$3.20
All	\$0.75	\$0.78



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2024-25	\$0.49	\$2.26	\$0.95
California 2025-26	\$0.48	\$3.08	\$0.86
Great Lakes 2024-25	\$0.43	\$3.47	\$0.66
Great Lakes 2025-26	\$0.40	\$3.74	\$0.64
Midsouth 2024-25	\$0.39	\$2.93	\$0.74
Midsouth 2025-26	\$0.39	\$3.28	\$0.72
Northeast 2024-25	\$0.41	\$2.15	\$0.93
Northeast 2025-26	\$0.40	\$2.50	\$0.87
Plains 2024-25	\$0.40	\$2.91	\$0.87
Plains 2025-26	\$0.39	\$3.24	\$0.83
Southcentral 2024-25	\$0.43	\$1.91	\$0.79
Southcentral 2025-26	\$0.41	\$3.53	\$0.80
Southeast 2024-25	\$0.44	\$2.89	\$0.84
Southeast 2025-26	\$0.42	\$3.24	\$0.81
West 2024-25	\$0.45	\$2.16	\$0.77
West 2025-26	\$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 January 25, 2026 versus the prior 52 weeks.

For questions or expanded information reach out to:

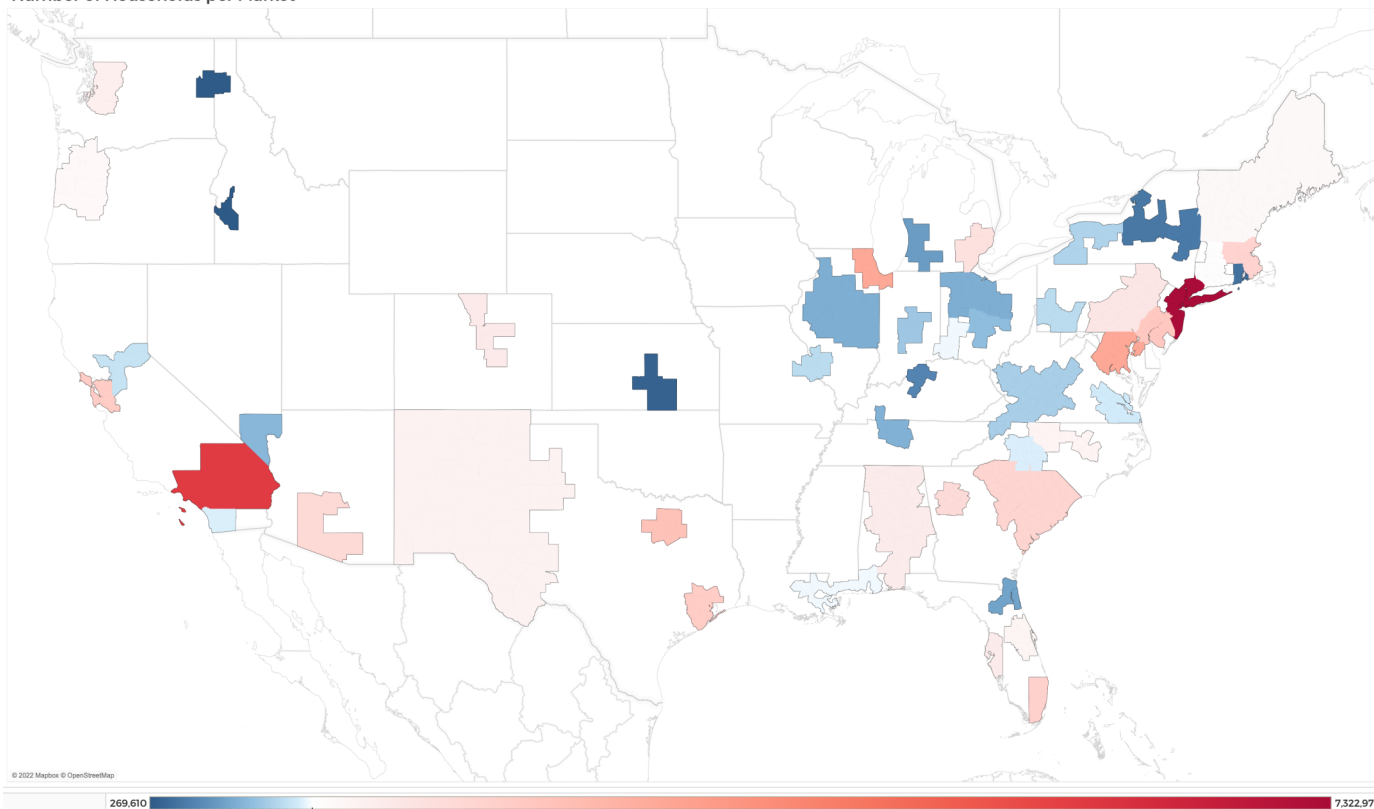
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Scanner Data Regions



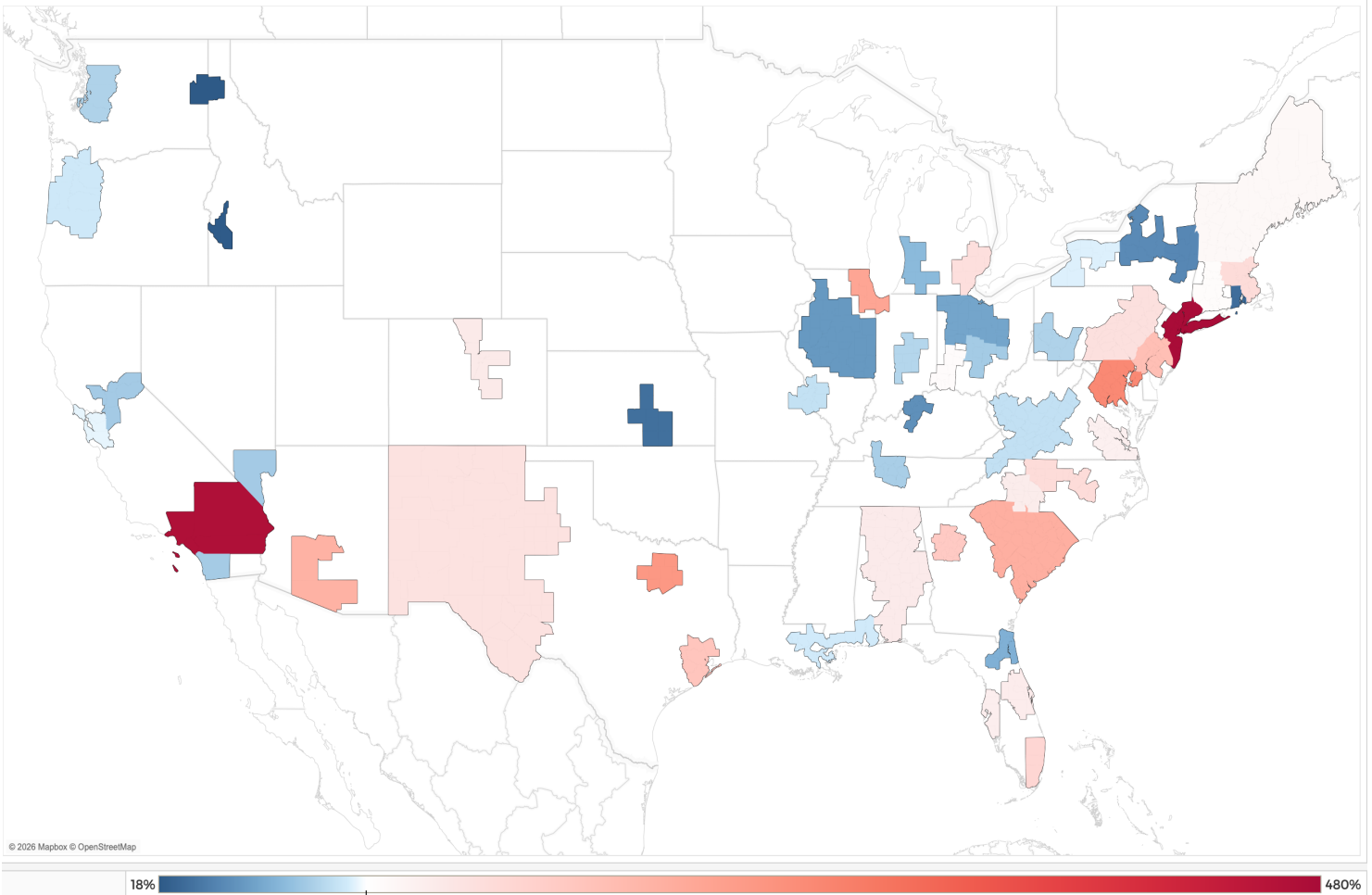
Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2024-25	235,515,907	52,507,079	59,284,360	347,307,347
California 2025-26	228,045,955	40,374,727	64,768,801	333,189,484
Percent Growth	-3.2%	-23.1%	9.3%	-4.1%
2025-26 % of Total	68.4%	12.1%	19.4%	100.0%
Great Lakes 2024-25	416,119,546	34,981,024	43,993,133	495,093,703
Great Lakes 2025-26	415,060,346	36,886,479	49,884,644	501,831,468
Percent Growth	-0.3%	5.4%	13.4%	1.4%
2025-26 % of Total	82.7%	7.4%	9.9%	100.0%
Midsouth 2024-25	418,083,562	53,859,023	41,279,404	513,221,989
Midsouth 2025-26	422,576,242	53,170,835	42,183,703	517,930,780
Percent Growth	1.1%	-1.3%	2.2%	0.9%
2025-26 % of Total	81.6%	10.3%	8.1%	100.0%
Northeast 2024-25	457,875,690	92,279,586	42,015,626	592,170,902
Northeast 2025-26	456,668,255	81,082,757	44,659,118	582,410,130
Percent Growth	-0.3%	-12.1%	6.3%	-1.6%
2025-26 % of Total	78.4%	13.9%	7.7%	100.0%
Plains 2024-25	229,192,949	16,356,401	11,978,969	257,528,319
Plains 2025-26	240,582,224	19,906,688	12,875,916	273,364,829
Percent Growth	5.0%	21.7%	7.5%	6.1%
2025-26 % of Total	88.0%	7.3%	4.7%	100.0%
Southcentral 2024-25	321,785,918	84,380,118	26,707,020	432,873,056
Southcentral 2025-26	338,947,650	47,770,430	26,797,588	413,515,669
Percent Growth	5.3%	-43.4%	0.3%	-4.5%
2025-26 % of Total	82.0%	11.6%	6.5%	100.0%
Southeast 2024-25	359,483,726	103,792,987	44,501,990	507,778,703
Southeast 2025-26	360,565,441	106,406,660	43,000,517	509,972,618
Percent Growth	0.3%	2.5%	-3.4%	0.4%
2025-26 % of Total	70.7%	20.9%	8.4%	100.0%
West 2024-25	282,793,410	52,401,385	55,048,581	390,243,375
West 2025-26	308,309,180	35,022,825	52,570,750	395,902,755
Percent Growth	9.0%	-33.2%	-4.5%	1.5%
2025-26 % of Total	77.9%	8.8%	13.3%	100.0%

Number of Households per Market



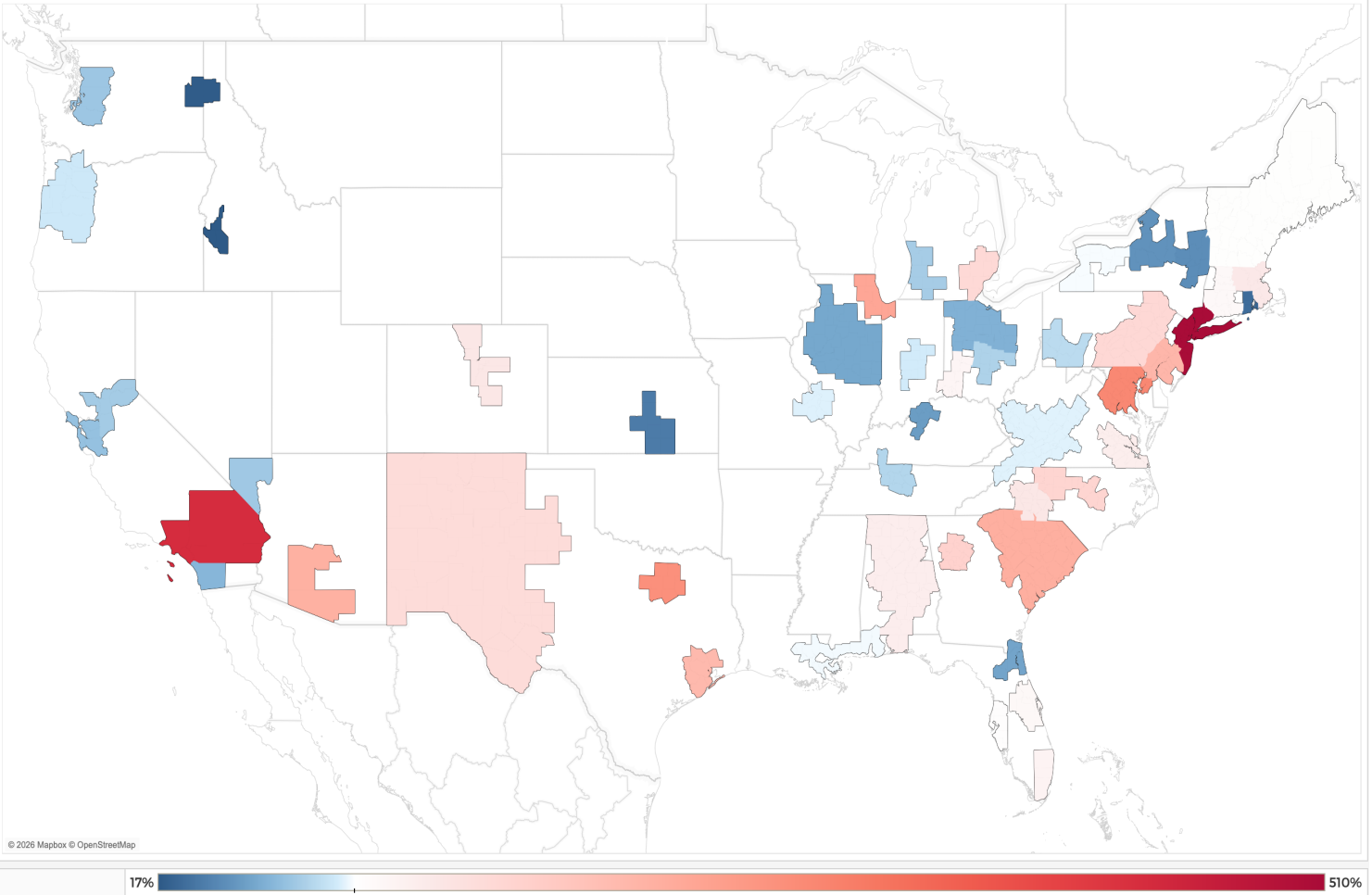
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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



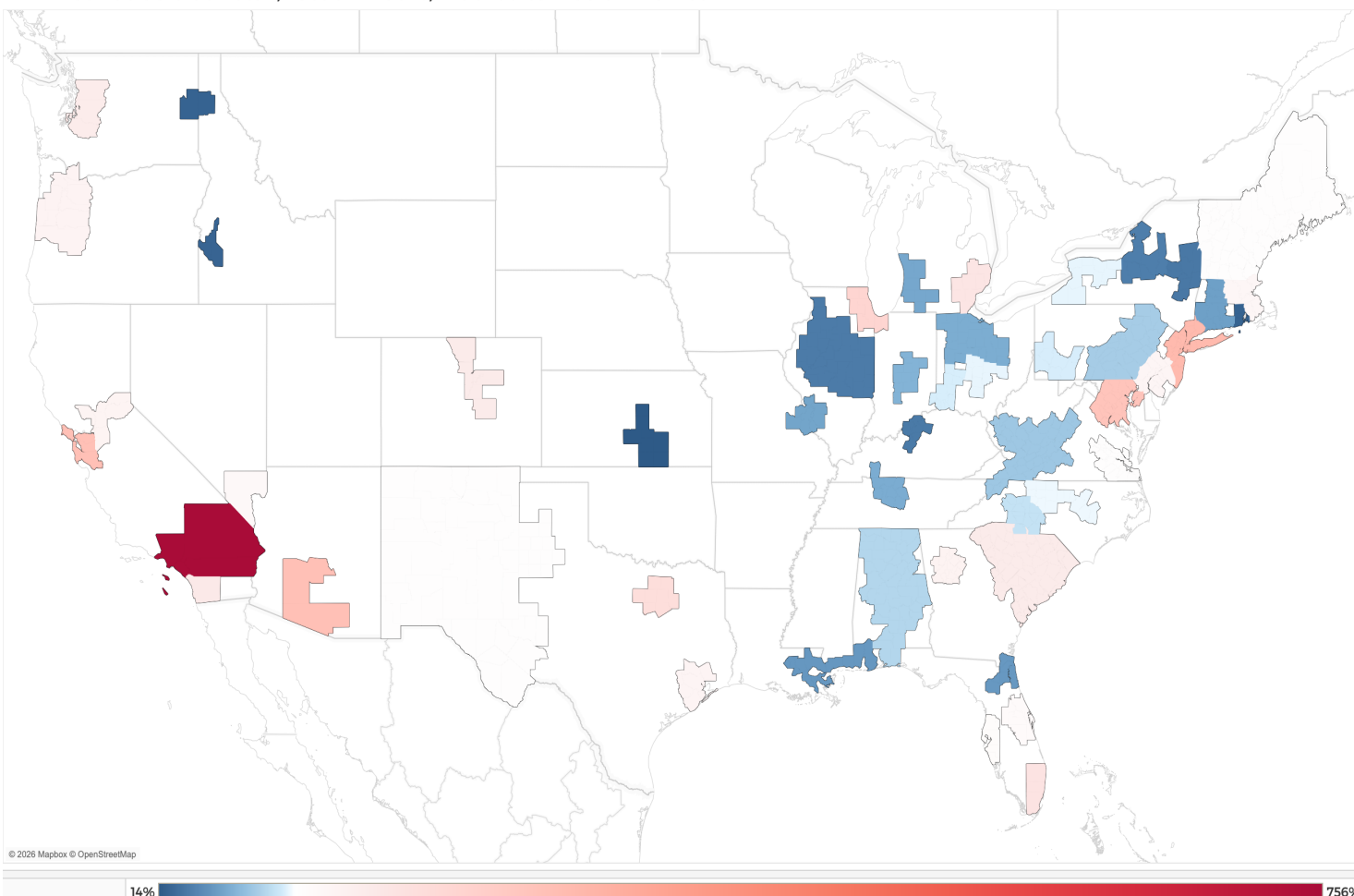
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
WEST TEX/NEW MEXICO	47,296,430	50,423,085	6.6%	PHOENIX/TUCSON	76,750,788	76,866,257	0.2%
BUFFALO/ROCHESTER	31,683,723	33,738,166	6.5%	ROANOKE	30,968,054	31,004,148	0.1%
GRAND RAPIDS	22,512,685	23,851,138	5.9%	TAMPA	43,758,305	43,746,138	0.0%
DENVER	43,647,116	46,104,676	5.6%	SACRAMENTO	27,163,513	27,143,556	-0.1%
HARRISBURG/SCRANTON	48,510,909	51,152,939	5.4%	LOUISVILLE	16,574,882	16,529,493	-0.3%
RALEIGH/GREENSBORO	51,216,373	53,692,776	4.8%	PITTSBURGH	28,667,884	28,572,478	-0.3%
CHARLOTTE	43,120,361	45,190,580	4.8%	BIRMINGHAM/MONTGOMERY	46,179,052	45,804,875	-0.8%
SYRACUSE	14,772,278	15,437,627	4.5%	ATLANTA	64,605,095	63,527,364	-1.7%
HOUSTON	63,805,417	66,430,460	4.1%	NEW ORLEANS/MOBILE	33,562,162	32,911,821	-1.9%
WICHITA	10,061,528	10,438,970	3.8%	HARTFORD/SPRINGFIELD	38,122,023	37,279,684	-2.2%
DETROIT	49,891,849	51,716,599	3.7%	PHILADELPHIA	71,738,337	69,906,992	-2.6%
ORLANDO	43,369,067	44,790,598	3.3%	DALLAS/FT. WORTH	94,916,710	91,491,581	-3.6%
INDIANAPOLIS	28,300,092	29,195,410	3.2%	LOS ANGELES	174,979,314	168,175,034	-3.9%
SOUTH CAROLINA	76,203,483	78,356,262	2.8%	BALTIMORE/WASHINGTON	103,780,799	99,727,119	-3.9%
CINCINNATI/DAYTON	36,318,990	37,311,133	2.7%	NEW YORK	179,082,887	171,914,394	-4.0%
TOLEDO	19,728,486	20,227,013	2.5%	SPOKANE	6,603,671	6,324,558	-4.2%
JACKSONVILLE	21,711,073	22,226,286	2.4%	NEW ENGLAND	41,021,781	39,237,858	-4.3%
ALBANY	14,631,702	14,934,752	2.1%	PROVIDENCE	10,475,697	9,967,384	-4.9%
PEORIA/SPRINGFIELD	17,778,249	18,057,869	1.6%	MIAMI/FT. LAUDERDALE	59,893,015	56,671,760	-5.4%
COLUMBUS	26,823,482	27,232,532	1.5%	CHICAGO	88,819,653	83,812,179	-5.6%
LAS VEGAS	26,781,923	27,137,627	1.3%	BOSTON	57,256,363	53,526,214	-6.5%
NASHVILLE	27,497,157	27,844,624	1.3%	SAN DIEGO	29,598,992	27,349,810	-7.6%
PORTLAND	32,167,265	32,531,416	1.1%	SEATTLE	31,365,192	28,570,956	-8.9%
ST. LOUIS	30,852,932	31,173,033	1.0%	SAN FRANCISCO	37,747,291	34,359,445	-9.0%
RICHMOND/NORFOLK	42,511,412	42,780,123	0.6%	BOISE	7,212,125	6,517,662	-9.6%

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



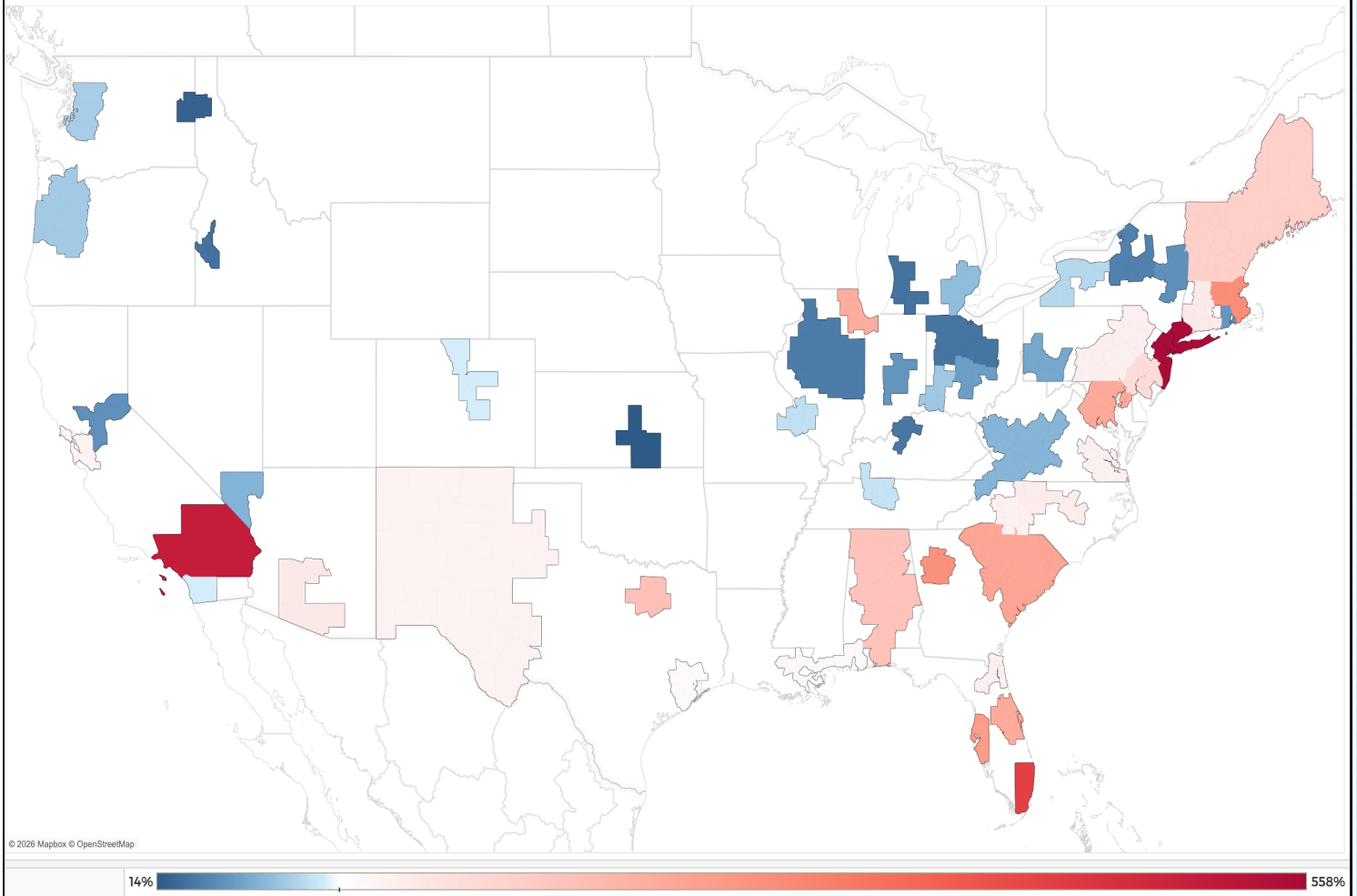
Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
DENVER	31,895,001	36,389,030	14.1%	CINCINNATI/DAYTON	30,061,047	30,513,264	1.5%
LAS VEGAS	18,039,238	19,944,521	10.6%	NASHVILLE	21,592,719	21,824,754	1.1%
PORTLAND	22,107,942	24,348,465	10.1%	ALBANY	11,759,596	11,877,000	1.0%
WEST TEX/NEW MEXICO	37,669,176	41,165,240	9.3%	PHILADELPHIA	57,839,593	58,257,656	0.7%
HOUSTON	52,160,226	56,933,281	9.2%	RICHMOND/NORFOLK	33,353,137	33,494,831	0.4%
SPOKANE	4,400,704	4,802,563	9.1%	COLUMBUS	21,284,232	21,304,159	0.1%
GRAND RAPIDS	19,279,112	20,499,515	6.3%	PROVIDENCE	7,220,186	7,201,699	-0.3%
HARRISBURG/SCRANTON	40,267,199	42,812,938	6.3%	PEORIA/SPRINGFIELD	15,461,130	15,394,681	-0.4%
RALEIGH/GREENSBORO	41,875,688	44,326,650	5.9%	LOS ANGELES	117,325,018	116,562,716	-0.6%
PHOENIX/TUCSON	57,823,327	60,764,201	5.1%	ATLANTA	46,061,068	45,695,681	-0.8%
BUFFALO/ROCHESTER	25,273,212	26,469,580	4.7%	NEW ORLEANS/MOBILE	26,519,526	26,281,926	-0.9%
WICHITA	8,901,631	9,317,198	4.7%	SAN DIEGO	17,561,991	17,374,985	-1.1%
CHARLOTTE	34,879,284	36,454,154	4.5%	BALTIMORE/WASHINGTON	80,122,321	78,993,919	-1.4%
DALLAS/FT. WORTH	72,050,041	75,257,205	4.5%	HARTFORD/SPRINGFIELD	29,937,490	29,507,035	-1.4%
SYRACUSE	12,138,940	12,604,438	3.8%	NEW ENGLAND	27,699,286	27,258,163	-1.6%
ORLANDO	28,610,900	29,642,572	3.6%	ROANOKE	25,936,884	25,462,871	-1.8%
DETROIT	41,161,279	42,539,848	3.3%	BIRMINGHAM/MONTGOMER	34,460,558	33,790,799	-1.9%
BOISE	4,439,800	4,584,844	3.3%	PITTSBURGH	23,016,611	22,550,091	-2.0%
SOUTH CAROLINA	59,594,915	61,443,644	3.1%	LOUISVILLE	14,357,269	14,017,600	-2.4%
SEATTLE	19,102,044	19,637,781	2.8%	SACRAMENTO	20,892,711	20,332,355	-2.7%
BOSTON	34,857,045	35,687,594	2.4%	ST. LOUIS	26,343,265	25,370,410	-3.7%
INDIANAPOLIS	24,262,147	24,801,007	2.2%	NEW YORK	142,869,904	136,988,208	-4.1%
JACKSONVILLE	14,662,480	14,971,342	2.1%	MIAMI/FT. LAUDERDALE	34,099,688	31,389,668	-7.9%
TAMPA	27,132,077	27,622,044	1.8%	CHICAGO	71,869,556	65,173,583	-9.3%
TOLEDO	16,461,742	16,711,287	1.5%	SAN FRANCISCO	23,521,849	18,914,177	-19.6%

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	5,494,164	8,024,881	46.1%	ALBANY	1,146,075	1,186,840	3.6%
ST. LOUIS	1,504,216	2,130,293	41.6%	INDIANAPOLIS	2,355,542	2,417,676	2.6%
BUFFALO/ROCHESTER	3,247,879	3,766,789	16.0%	CHARLOTTE	3,336,458	3,419,282	2.5%
PROVIDENCE	640,503	740,294	15.6%	TOLEDO	2,255,415	2,294,258	1.7%
LOUISVILLE	1,077,140	1,227,287	13.9%	PORTLAND	4,952,357	4,995,212	0.9%
PEORIA/SPRINGFIELD	1,118,300	1,268,872	13.5%	NEW ENGLAND	4,080,490	4,111,558	0.8%
PHILADELPHIA	4,268,288	4,789,954	12.2%	WEST TEX/NEW MEXICO	4,071,150	4,057,577	-0.3%
PITTSBURGH	3,274,184	3,655,509	11.6%	BOISE	781,415	778,030	-0.4%
SAN DIEGO	5,402,774	5,998,530	11.0%	RALEIGH/GREENSBORO	3,900,158	3,815,925	-2.2%
SAN FRANCISCO	9,321,574	10,308,557	10.6%	SOUTH CAROLINA	5,893,261	5,745,823	-2.5%
SPOKANE	673,738	744,045	10.4%	ORLANDO	4,478,996	4,347,865	-2.9%
ROANOKE	2,613,178	2,855,018	9.3%	SEATTLE	5,846,029	5,654,453	-3.3%
JACKSONVILLE	1,723,898	1,882,455	9.2%	BIRMINGHAM/MONTGOMERY	3,289,052	3,171,124	-3.6%
CINCINNATI/DAYTON	3,380,069	3,661,719	8.3%	NASHVILLE	2,366,166	2,280,406	-3.6%
LOS ANGELES	27,653,848	29,769,934	7.7%	HARTFORD/SPRINGFIELD	2,131,474	2,040,804	-4.3%
SACRAMENTO	4,628,575	4,930,243	6.5%	TAMPA	4,478,851	4,213,622	-5.9%
COLUMBUS	3,560,272	3,773,713	6.0%	RICHMOND/NORFOLK	4,311,661	4,056,092	-5.9%
DETROIT	5,989,727	6,314,220	5.4%	ATLANTA	5,379,523	5,048,552	-6.2%
NEW YORK	10,454,235	10,971,053	4.9%	DALLAS/FT. WORTH	7,607,854	7,138,384	-6.2%
HARRISBURG/SCRANTON	2,845,750	2,972,843	4.5%	LAS VEGAS	4,888,754	4,558,391	-6.8%
NEW ORLEANS/MOBILE	1,787,571	1,866,821	4.4%	PHOENIX/TUCSON	11,175,101	10,254,310	-8.2%
BOSTON	4,502,415	4,699,542	4.4%	MIAMI/FT. LAUDERDALE	7,227,414	6,537,911	-9.5%
GRAND RAPIDS	2,091,273	2,181,808	4.3%	HOUSTON	5,422,809	4,889,850	-9.8%
SYRACUSE	1,265,238	1,319,559	4.3%	WICHITA	614,679	542,241	-11.8%
BALTIMORE/WASHINGTON	9,513,820	9,864,807	3.7%	DENVER	6,729,105	5,743,819	-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	3,005,450	3,672,330	22.2%	PITTSBURGH	2,377,089	2,366,878	-0.4%
TOLEDO	1,011,328	1,221,468	20.8%	HARRISBURG/SCRANTON	5,397,960	5,367,158	-0.6%
INDIANAPOLIS	1,682,403	1,976,727	17.5%	TAMPA	12,147,377	11,910,472	-2.0%
PEORIA/SPRINGFIELD	1,198,819	1,394,316	16.3%	ATLANTA	13,164,504	12,783,130	-2.9%
SACRAMENTO	1,642,228	1,880,958	14.5%	HARTFORD/SPRINGFIELD	6,053,059	5,731,845	-5.3%
LOUISVILLE	1,140,473	1,284,606	12.6%	WEST TEX/NEW MEXICO	5,556,105	5,200,268	-6.4%
ROANOKE	2,417,992	2,686,259	11.1%	NEW YORK	25,758,748	23,955,133	-7.0%
BUFFALO/ROCHESTER	3,162,632	3,501,797	10.7%	CHICAGO	11,455,932	10,613,715	-7.4%
SYRACUSE	1,368,100	1,513,629	10.6%	NEW ORLEANS/MOBILE	5,255,065	4,763,074	-9.4%
CINCINNATI/DAYTON	2,877,874	3,136,150	9.0%	NEW ENGLAND	9,242,006	7,868,138	-14.9%
COLUMBUS	1,978,978	2,154,659	8.9%	DENVER	5,023,010	3,971,827	-20.9%
CHARLOTTE	4,904,619	5,317,144	8.4%	PROVIDENCE	2,615,008	2,025,391	-22.5%
ALBANY	1,726,032	1,870,912	8.4%	BALTIMORE/WASHINGTON	14,144,658	10,868,393	-23.2%
RICHMOND/NORFOLK	4,846,614	5,229,200	7.9%	PHOENIX/TUCSON	7,752,361	5,847,746	-24.6%
WICHITA	545,219	579,531	6.3%	HOUSTON	6,222,382	4,607,329	-26.0%
NASHVILLE	3,538,272	3,739,464	5.7%	BOSTON	17,896,902	13,139,078	-26.6%
ORLANDO	10,279,171	10,800,161	5.1%	LOS ANGELES	30,000,448	21,842,384	-27.2%
BIRMINGHAM/MONTGOMERY	8,429,441	8,842,952	4.9%	PHILADELPHIA	9,630,456	6,859,382	-28.8%
SAN FRANCISCO	4,903,868	5,136,711	4.7%	LAS VEGAS	3,853,932	2,634,715	-31.6%
DETROIT	2,740,844	2,862,531	4.4%	PORTLAND	5,106,966	3,187,740	-37.6%
SOUTH CAROLINA	10,715,306	11,166,795	4.2%	SAN DIEGO	6,634,227	3,976,296	-40.1%
GRAND RAPIDS	1,142,300	1,169,815	2.4%	DALLAS/FT. WORTH	15,258,815	9,095,992	-40.4%
RALEIGH/GREENSBORO	5,440,526	5,550,200	2.0%	BOISE	1,990,909	1,154,788	-42.0%
MIAMI/FT. LAUDERDALE	18,565,914	18,744,181	1.0%	SEATTLE	6,417,120	3,278,722	-48.9%
JACKSONVILLE	5,324,694	5,372,490	0.9%	SPOKANE	1,529,229	777,950	-49.1%