

NEWS RELEASE

National Watermelon Promotion Board FOR IMMEDIATE RELEASE



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Watermelon Tops 3.5 Billion Pounds at Retail as NWPB Reveals Path to Sustained Growth

New State of the Category research and marketing guide provides industry with key opportunities to strengthen seasonal performance and expand regional growth

Winter Springs, FL — March 18, 2026 – The watermelon category surpassed 3.5 billion pounds at retail in 2025, and new research from the National Watermelon Promotion Board (NWPB) delivers a clear roadmap for sustained growth. Today, the NWPB released its 2025 State of the Category Marketing Guide, equipping retailers, marketers, and category managers with fact-based insights to drive year-round watermelon sales. The new research highlights how whole and cut watermelon play distinct, but complementary roles throughout the year.

The findings point to three clear opportunities for the industry to maximize retail sales:

- Capitalize on the strong promotional performance of whole watermelon during spring and summer, even beyond traditional holiday windows. It consistently outperforms other melon varieties, delivering a stronger promotional lift with a smaller average discount.
- Leverage cut watermelon strategically in fall and winter, when it drives retail sales and growth as whole watermelon availability tightens.
- Utilize the regional insights in the guide to adapt pricing, distribution and merchandising strategies by region to unlock growth in both developed and emerging markets.

On an annual basis, whole watermelon remains the primary driver of retail volume, accounting for 79% of total pounds sold and contributing more than 41 million incremental pounds year over year. Meanwhile, cut watermelon drives annual dollar sales, representing 49% of total sales and adding more than \$117 million in incremental growth. While both forms are essential to category health, their impact varies significantly by season and availability.

During the spring and summer seasons, whole watermelon stands as the clear category driver, accounting for 77% of annual retail volume and reaching an 86% share in June and July. On promotion, it outpaced both cantaloupe and honeydew, delivering +75% volume lift and +50% dollar lift on smaller discounts than either variety. The data makes a compelling case for extending whole watermelon promotional support beyond traditional holiday windows, where significant incremental sales opportunities remain untapped.

As the calendar shifts to fall and winter, so does the opportunity. Cut watermelon becomes the category's primary dollar driver when whole-fruit availability declines, accounting for 49% of annual dollar sales and reaching a 70% share in December. With 30% of cut volume sold on promotion during the fall/winter season, it generates efficient lift and sustained dollar momentum at a time when overall category promotion softens, reinforcing its role as a critical driver for maintaining sales outside peak summer months.

Regionally, the data makes one thing clear: opportunity exists across the U.S. The Plains led national performance with a +17% increase in volume versus 2021, demonstrating how well-developed regions can continue to expand. In addition, wide pricing variation further underscores regional opportunities. For example, in the Great Lakes, cut watermelon is priced up to 835% higher than whole fruit, highlighting differences in value

perception and merchandising strategies across markets. Whether a region is developed or still emerging, the guide delivers insights to help retailers refine pricing, optimize distribution, and tailor promotional strategies to accelerate watermelon growth nationwide.



The NWPB's State of the Category Marketing Guide is a new tool for the watermelon industry that equips retailers, marketers, and category managers with fact-based insights to drive watermelon sales year-round.



"Watermelon is a produce category performer, and we see significant opportunity for continued growth," said Mark Arney, Executive Director for the NWPB. "From extending whole watermelon promotions beyond the summer holidays to aligning promotional strategy and merchandising, the guide gives the industry the tools to drive year-round growth. We're excited to get it into their hands."

The NWPB invites all industry professionals, retailers, and stakeholders to leverage insights and actionable recommendations in the State of the Category report and Marketing Guide. For more information on accessing these invaluable resources or about the NWPB's initiatives, please visit <https://www.watermelon.org/audiences/industry/research/retail-research/>.

About the National Watermelon Promotion Board

The National Watermelon Promotion Board (NWPB), based in Winter Springs, Florida, was established in 1989 as an agricultural promotion group to promote watermelon in the United States and in various markets abroad. Funded through a self-mandated industry assessment paid by more than 700 watermelon producers, handlers and importers, NWPB mission is to increase consumer demand for watermelon through promotion, research and education programs.

A serving of nutrient-dense watermelon provides an excellent source of Vitamin C (25% DV), a source of Vitamin B6 (8% DV), and a delicious way to stay hydrated (92% water), with only 80 calories per 2-cup serving. Watermelon consumption per capita in the United States was roughly 15.4 pounds in 2025. Watermelon consumption in the United States approximated 5.3 billion pounds in 2025. Additionally, the United States exported 363 million pounds of watermelon. For additional information, visit www.watermelon.org.

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