



National
Watermelon
Promotion Board



MARKETING GUIDE

WATERMELON STATE OF THE CATEGORY: THE RETAIL TRENDS GUIDING SUSTAINABLE GROWTH

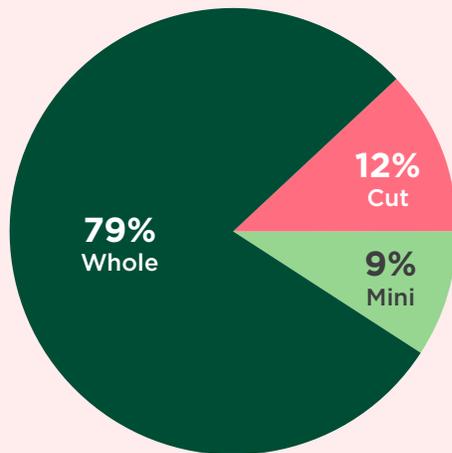
MARCH 2026

Leverage Seasonal Strengths to Optimize Retail Performance of Watermelon

Whole watermelon drove annual retail sales while cut watermelon emerged as a key player during the fall/winter season.

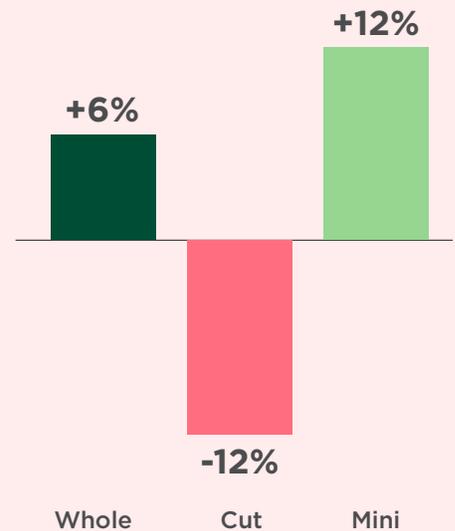
Watermelon Volume (lbs.) Sales Share 2025

Whole watermelon accounted for 79% of total category retail volume (lbs.) in 2025, and gained nearly +2 share points since 2021.



Change vs. 2021	
Whole	+1.5 pts.
Cut	-2.1 pts.
Mini	+0.6 pts.

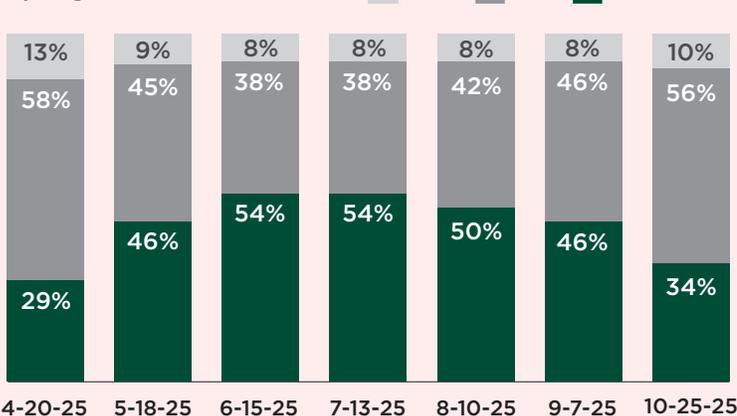
Watermelon (lbs.) Growth Rate vs. 2021



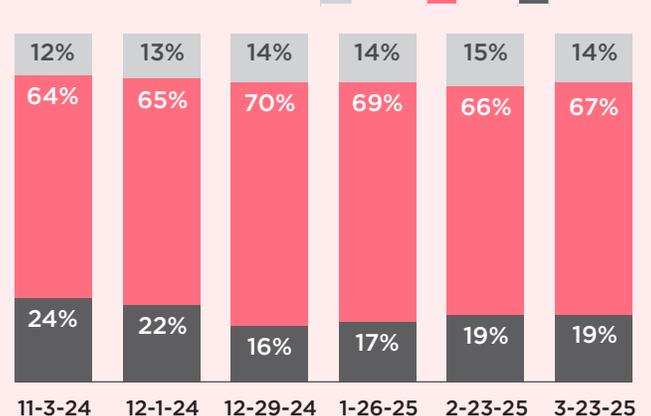
Watermelon Dollar Sales Share

During peak season, whole watermelon was the primary driver of retail sales, while cut watermelon drove fall/winter sales.

Spring/Summer Season



Fall/Winter Season



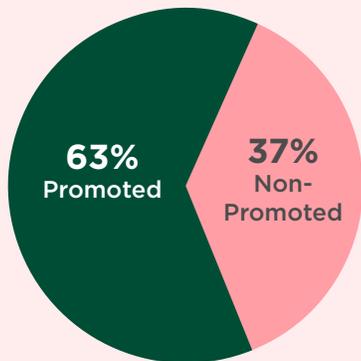
Unlock additional value by aligning promotional strategy, pricing, and merchandising to seasonal roles, ensuring each form receives the right level of support at the right time.

Watermelon Promotions Drive Results

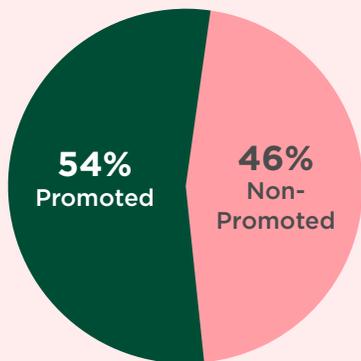
Over 60% of whole watermelon was sold on promotion in 2025. Watermelon delivered stronger promotional performance than other melons on a smaller discount during the spring/summer season.

Promoted Volume (lbs.) Share of Whole Melon — Spring/Summer Season

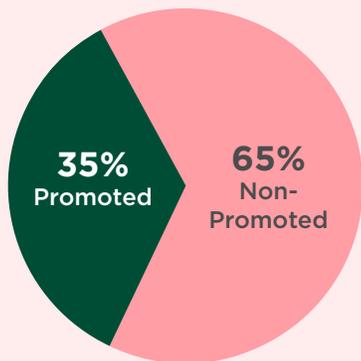
Watermelon



Cantaloupe



Honeydew

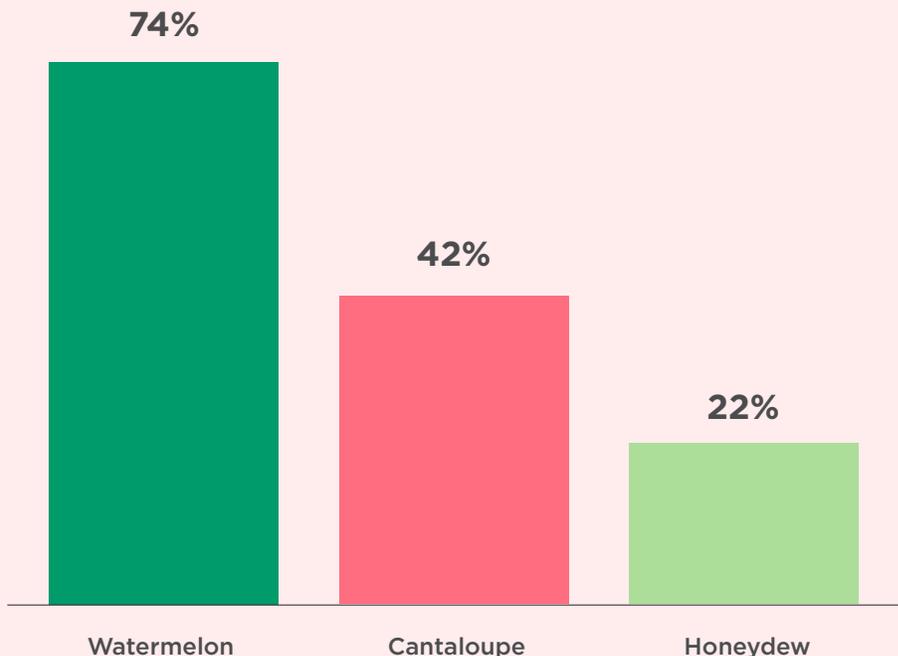


Average Whole Melon Discount — Spring/Summer Season

Watermelon -18%	Cantaloupe -24%	Honeydew -24%
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During the peak season, whole watermelon achieved a +74% volume lift on an -18% discount.

Promoted Volume (lbs.) Sales Lift of Whole Melon — Spring/Summer Season



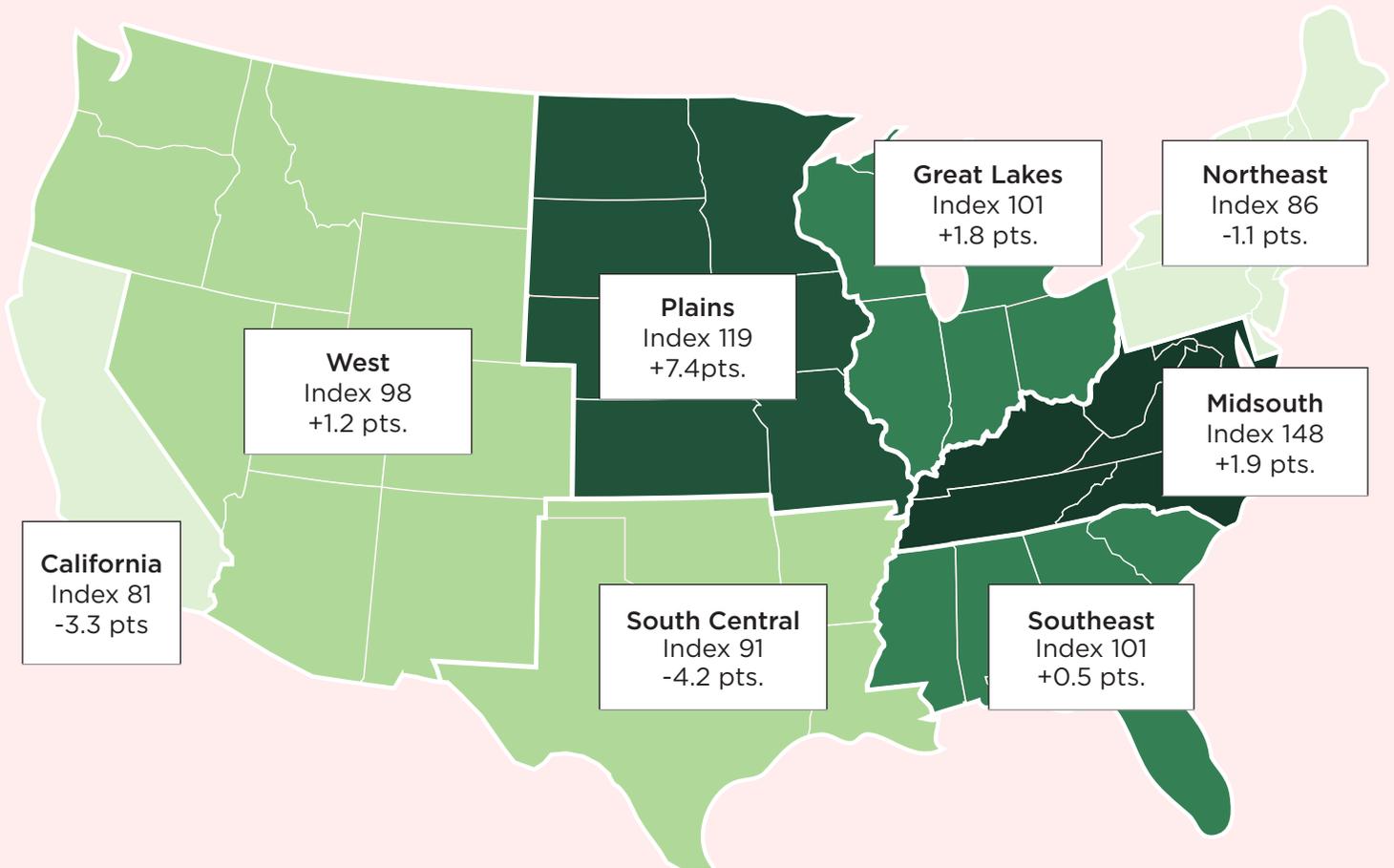
Extend whole watermelon promotional activity beyond traditional holiday windows. Use non-holiday features, displays, and secondary placements to drive incremental category growth.

Turn Regional Insight Into Retail Advantage

Regional retail trends highlight strong category development in the Midsouth and Plains. These trends demonstrate that development differs across the U.S., emphasizing the need for region-specific growth strategies.

Watermelon Category Index by Volume (lbs.) — 2025 vs. 2024

Category Development Index (CDI): CDI measures each region's share of Total U.S. watermelon volume compared to its share of the Total U.S. population.



Leverage insights from the full State of the Category study to align pricing, distribution, and merchandising strategies with each region's unique category dynamics to unlock growth opportunities and drive watermelon retail sales nationwide.

Visit Watermelon.org for additional research on how retail trends have evolved nationally and regionally since 2021 and uncover opportunities to drive growth within the watermelon category.

