



# Retail Scan Data

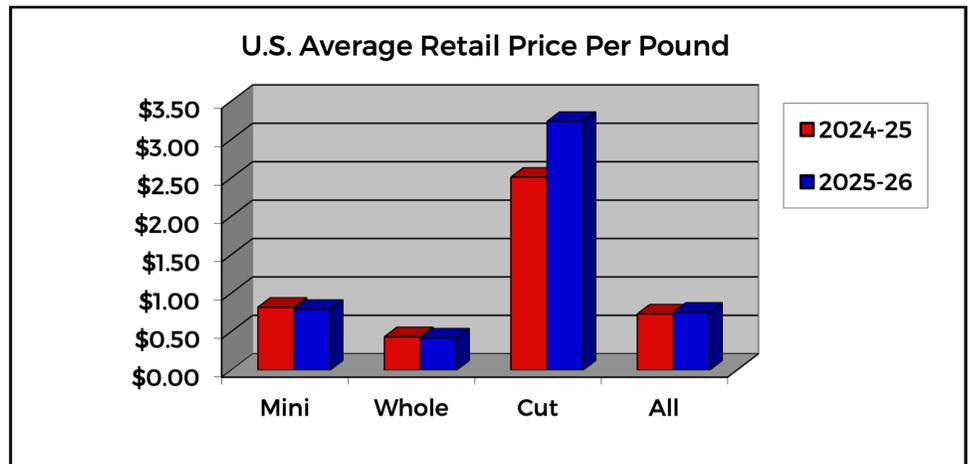
Compiled by the National Watermelon Promotion Board



Data current through  
February 22, 2026

Retail Sales in Pounds				
Category	2024-25	2025-26	% Change	2025-26 Sales Share
Mini	370,693,516	382,798,513	3.3%	9.7%
Whole	3,056,770,710	3,155,494,613	3.2%	79.7%
Cut	491,355,586	420,966,313	-14.3%	10.6%
Total	3,918,819,812	3,959,259,439	1.0%	100.0%

Retail Price per Pound		
Category	2024-25	2025-26
Mini	\$0.82	\$0.79
Whole	\$0.43	\$0.42
Cut	\$2.51	\$3.24
All	\$0.73	\$0.75



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2024-25	\$0.49	\$2.25	\$0.89
California 2025-26	\$0.47	\$3.14	\$0.83
Great Lakes 2024-25	\$0.43	\$3.50	\$0.68
Great Lakes 2025-26	\$0.41	\$3.80	\$0.66
Midsouth 2024-25	\$0.40	\$2.96	\$0.74
Midsouth 2025-26	\$0.40	\$3.32	\$0.72
Northeast 2024-25	\$0.42	\$2.18	\$0.92
Northeast 2025-26	\$0.42	\$2.53	\$0.86
Plains 2024-25	\$0.41	\$2.94	\$0.87
Plains 2025-26	\$0.39	\$3.28	\$0.85
Southcentral 2024-25	\$0.43	\$1.96	\$0.79
Southcentral 2025-26	\$0.41	\$3.59	\$0.80
Southeast 2024-25	\$0.44	\$2.88	\$0.85
Southeast 2025-26	\$0.42	\$3.29	\$0.82
West 2024-25	\$0.46	\$2.24	\$0.78
West 2025-26	\$0.43	\$3.60	\$0.80

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 February 22, 2026 versus the prior 52 weeks.

For questions or expanded information reach out to:

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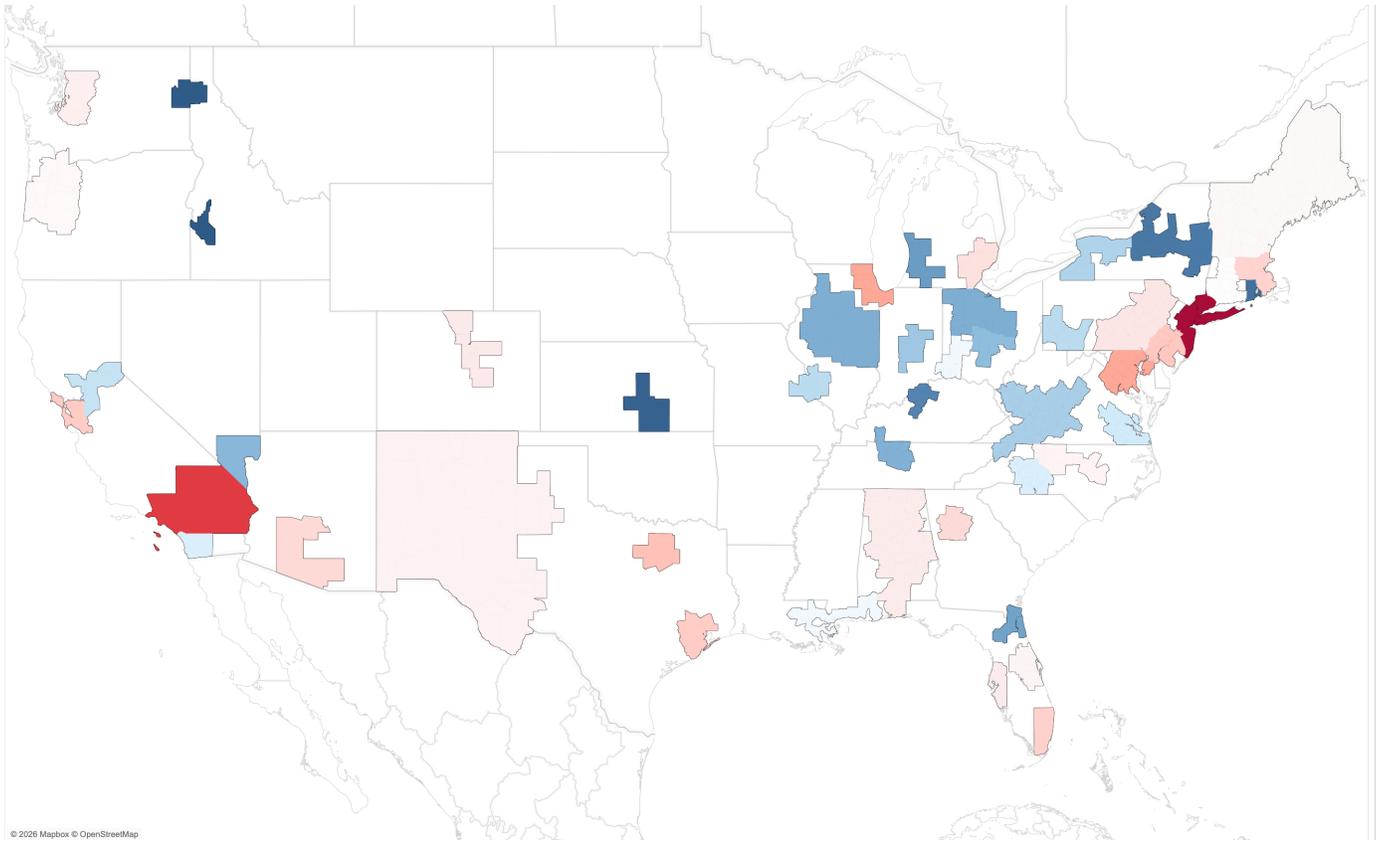
## Scanner Data Regions



Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2024-25	339,229,715	55,200,626	81,138,095	475,568,437
California 2025-26	360,486,867	40,972,244	87,102,095	488,561,199
Percent Growth	6.3%	-25.8%	7.4%	2.7%
2025-26 % of Total	73.8%	8.4%	17.8%	100.0%
Great Lakes 2024-25	447,483,875	35,141,041	47,884,485	530,509,401
Great Lakes 2025-26	449,301,390	36,828,776	52,229,465	538,359,631
Percent Growth	0.4%	4.8%	9.1%	1.5%
2025-26 % of Total	83.5%	6.8%	9.7%	100.0%
Midsouth 2024-25	445,383,089	53,614,242	43,751,469	542,748,800
Midsouth 2025-26	448,380,461	52,972,620	45,607,808	546,960,888
Percent Growth	0.7%	-1.2%	4.2%	0.8%
2025-26 % of Total	82.0%	9.7%	8.3%	100.0%
Northeast 2024-25	510,469,742	91,848,216	47,027,036	649,344,994
Northeast 2025-26	507,039,040	81,260,083	50,680,791	638,979,814
Percent Growth	-0.7%	-11.5%	7.8%	-1.6%
2025-26 % of Total	79.4%	12.7%	7.9%	100.0%
Plains 2024-25	245,552,581	16,424,232	14,092,824	276,069,637
Plains 2025-26	258,771,086	20,166,553	14,092,261	293,029,901
Percent Growth	5.4%	22.8%	0.0%	6.1%
2025-26 % of Total	88.3%	6.9%	4.8%	100.0%
Southcentral 2024-25	337,735,380	83,093,845	28,841,559	449,670,783
Southcentral 2025-26	387,537,441	47,570,575	28,802,102	435,227,449
Percent Growth	6.3%	-42.8%	-0.1%	-3.2%
2025-26 % of Total	82.5%	10.9%	6.6%	100.0%
Southeast 2024-25	383,219,948	105,070,429	45,926,929	534,217,305
Southeast 2025-26	387,537,441	105,233,208	44,130,831	536,901,480
Percent Growth	1.1%	0.2%	-3.9%	0.5%
2025-26 % of Total	72.2%	19.6%	8.2%	100.0%
West 2024-25	347,696,380	50,962,956	62,031,120	460,690,456
West 2025-26	385,123,556	35,962,254	60,153,168	481,238,978
Percent Growth	10.8%	-29.4%	-3.0%	4.5%
2025-26 % of Total	80.0%	7.5%	12.5%	100.0%



## Scanner Data Markets — Households



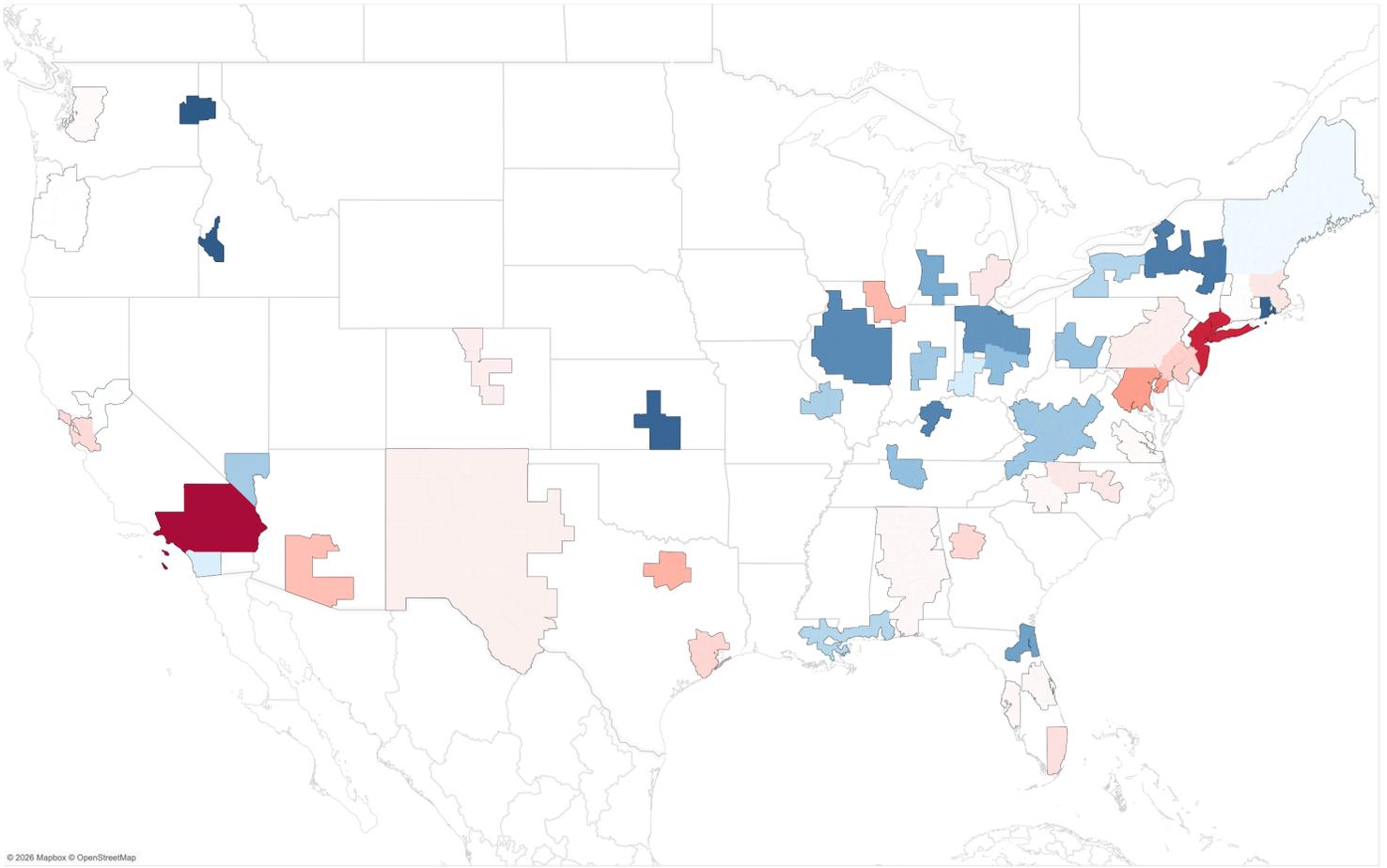
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Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	NEW ORLEANS/MOBILE	3,138,652	1,210,254
LOS ANGELES	17,923,688	5,828,361	SAN DIEGO	3,313,042	1,167,276
CHICAGO	9,024,641	3,326,661	CHARLOTTE	3,022,109	1,166,045
BALTIMORE/WASHINGTON	8,747,475	3,302,814	RICHMOND/NORFOLK	3,005,465	1,146,783
DALLAS/FT. WORTH	7,387,718	2,673,203	SACRAMENTO	3,105,662	1,097,351
PHILADELPHIA	6,677,352	2,523,950	ST. LOUIS	2,635,048	1,052,009
HOUSTON	6,974,818	2,431,415	PITTSBURGH	2,483,334	1,050,493
SAN FRANCISCO	6,614,206	2,424,893	BUFFALO/ROCHESTER	2,465,162	1,003,811
MIAMI/FT. LAUDERDALE	6,115,693	2,311,762	ROANOKE	2,374,132	975,483
BOSTON	5,816,699	2,252,721	INDIANAPOLIS	2,394,786	933,721
PHOENIX/TUCSON	5,551,224	2,078,257	COLUMBUS	2,186,812	865,297
ATLANTA	5,581,621	2,061,905	LAS VEGAS	2,267,612	833,639
DETROIT	4,860,654	1,906,690	NASHVILLE	2,065,127	795,655
HARRISBURG/SCRANTON	4,574,232	1,779,694	PEORIA/SPRINGFIELD	1,952,702	782,525
DENVER	4,313,555	1,698,222	TOLEDO	1,992,358	777,879
TAMPA	4,020,265	1,677,147	JACKSONVILLE	1,829,816	716,122
BIRMINGHAM/MONTGOMERY	4,204,001	1,655,159	GRAND RAPIDS	1,775,105	673,617
SEATTLE	3,959,531	1,580,072	LOUISVILLE	1,318,292	527,730
WEST TEX/NEW MEXICO	4,134,572	1,509,632	ALBANY	1,142,493	465,633
RALEIGH/GREENSBORO	3,763,913	1,481,572	SYRACUSE	1,152,592	453,783
ORLANDO	3,758,407	1,460,241	PROVIDENCE	1,060,757	416,922
NEW ENGLAND	3,402,121	1,386,532	WICHITA	831,372	322,437
PORTLAND	3,512,264	1,376,992	SPOKANE	694,837	275,315
HARTFORD/SPRINGFIELD	3,246,920	1,266,721	BOISE	743,617	269,610
CINCINNATI/DAYTON	3,057,108	1,211,497			

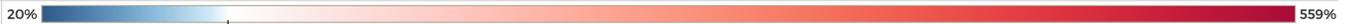


# Scanner Data Markets — Total

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



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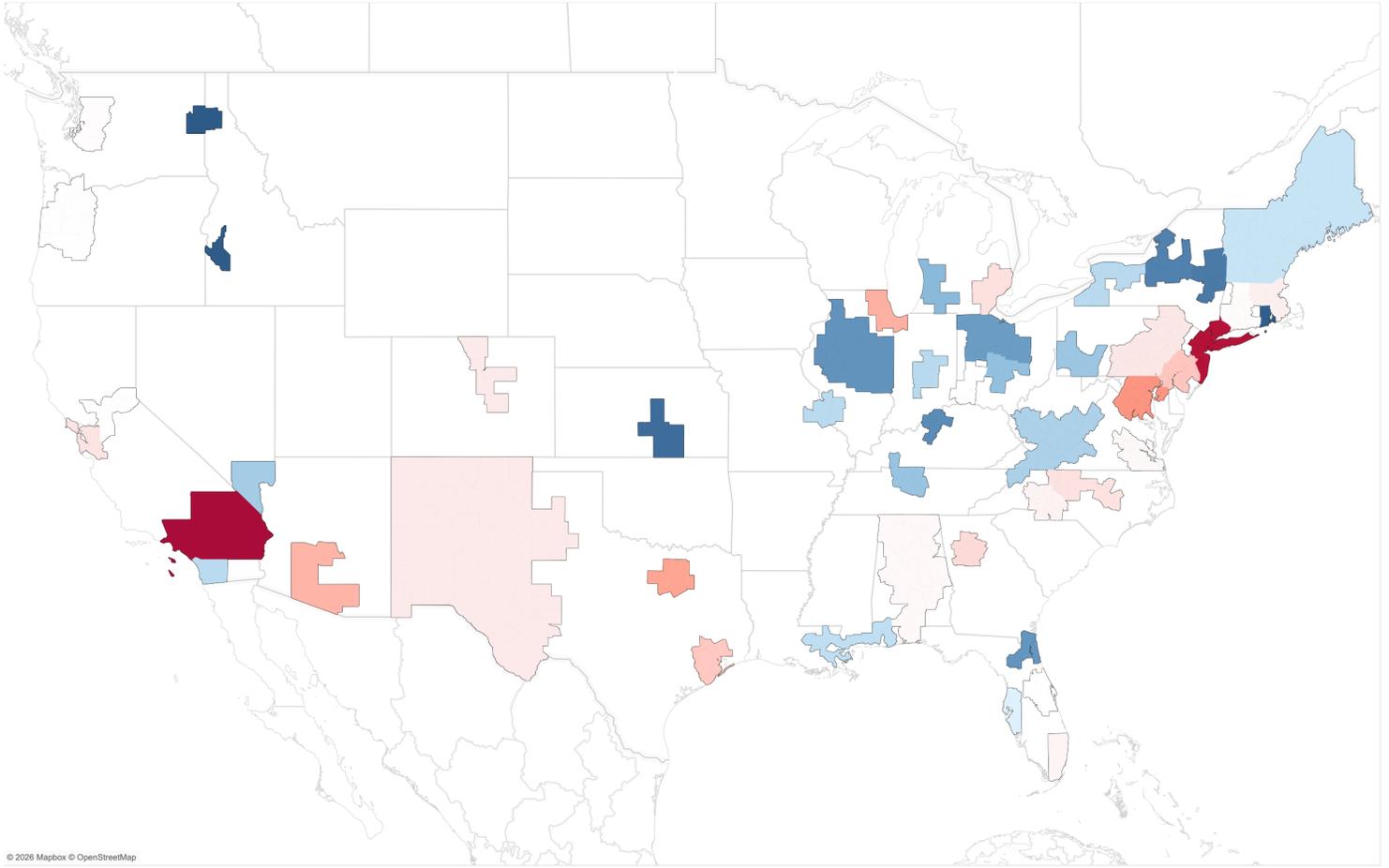


Largest % Increase				Rest of Markets			
	Prior #	Current #	% Change		Prior #	Current #	% Change
PORTLAND	39,400,361	41,923,301	6.4%	ST. LOUIS	32,535,026	33,060,999	1.6%
BUFFALO/ROCHESTER	32,299,797	34,336,178	6.3%	SEATTLE	44,563,633	44,971,999	0.9%
WEST TEX/NEW MEXICO	49,237,712	52,183,540	6.0%	COLUMBUS	28,703,398	28,928,444	0.8%
GRAND RAPIDS	23,768,173	25,126,369	5.7%	RICHMOND/NORFOLK	44,300,709	44,628,483	0.7%
HOUSTON	68,070,859	71,810,332	5.5%	ROANOKE	31,234,072	31,291,848	0.2%
LAS VEGAS	30,748,385	32,245,931	4.9%	TAMPA	46,813,178	46,753,905	-0.1%
DENVER	50,788,256	53,257,275	4.9%	SAN FRANCISCO	68,089,532	67,998,376	-0.1%
HARRISBURG/SCRANTON	50,355,390	52,760,892	4.8%	PITTSBURGH	30,178,786	30,121,770	-0.2%
SACRAMENTO	39,916,988	41,812,319	4.7%	BIRMINGHAM/MONTGOMERY	47,463,055	47,181,347	-0.6%
RALEIGH/GREENSBORO	54,424,427	57,000,733	4.7%	LOUISVILLE	17,435,812	17,314,652	-0.7%
CHARLOTTE	44,841,340	46,772,202	4.3%	NEW ORLEANS/MOBILE	34,873,882	34,494,468	-1.1%
WICHITA	10,428,690	10,877,413	4.3%	SAN DIEGO	39,853,690	39,390,167	-1.2%
SYRACUSE	15,233,822	15,870,833	4.2%	ATLANTA	70,480,965	69,560,269	-1.3%
SPOKANE	8,034,906	8,366,479	4.1%	DALLAS/FT. WORTH	100,867,410	99,459,903	-1.4%
INDIANAPOLIS	30,519,819	31,536,690	3.3%	HARTFORD/SPRINGFIELD	43,134,719	42,422,392	-1.7%
PHOENIX/TUCSON	87,379,050	90,273,107	3.3%	PHILADELPHIA	78,099,608	75,965,367	-2.7%
DETROIT	55,889,673	57,634,956	3.1%	NEW ENGLAND	42,351,382	40,872,279	-3.5%
LOS ANGELES	228,106,033	234,509,850	2.8%	MIAMI/FT. LAUDERDALE	65,881,281	63,434,772	-3.7%
TOLEDO	20,482,371	20,994,416	2.5%	NEW YORK	215,295,365	207,196,211	-3.8%
NASHVILLE	28,902,058	29,597,276	2.4%	BALTIMORE/WASHINGTON	119,750,709	114,979,641	-4.0%
ORLANDO	46,191,205	47,274,423	2.3%	BOISE	9,030,913	8,662,938	-4.1%
ALBANY	14,600,975	14,921,445	2.2%	PROVIDENCE	10,481,334	9,983,780	-4.7%
CINCINNATI/DAYTON	38,340,638	39,163,057	2.1%	CHICAGO	100,274,376	95,502,117	-4.8%
PEORIA/SPRINGFIELD	18,305,227	18,691,174	2.1%	BOSTON	61,741,680	58,235,988	-5.7%
JACKSONVILLE	23,190,991	23,571,226	1.6%				



# Scanner Data Markets — Whole

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



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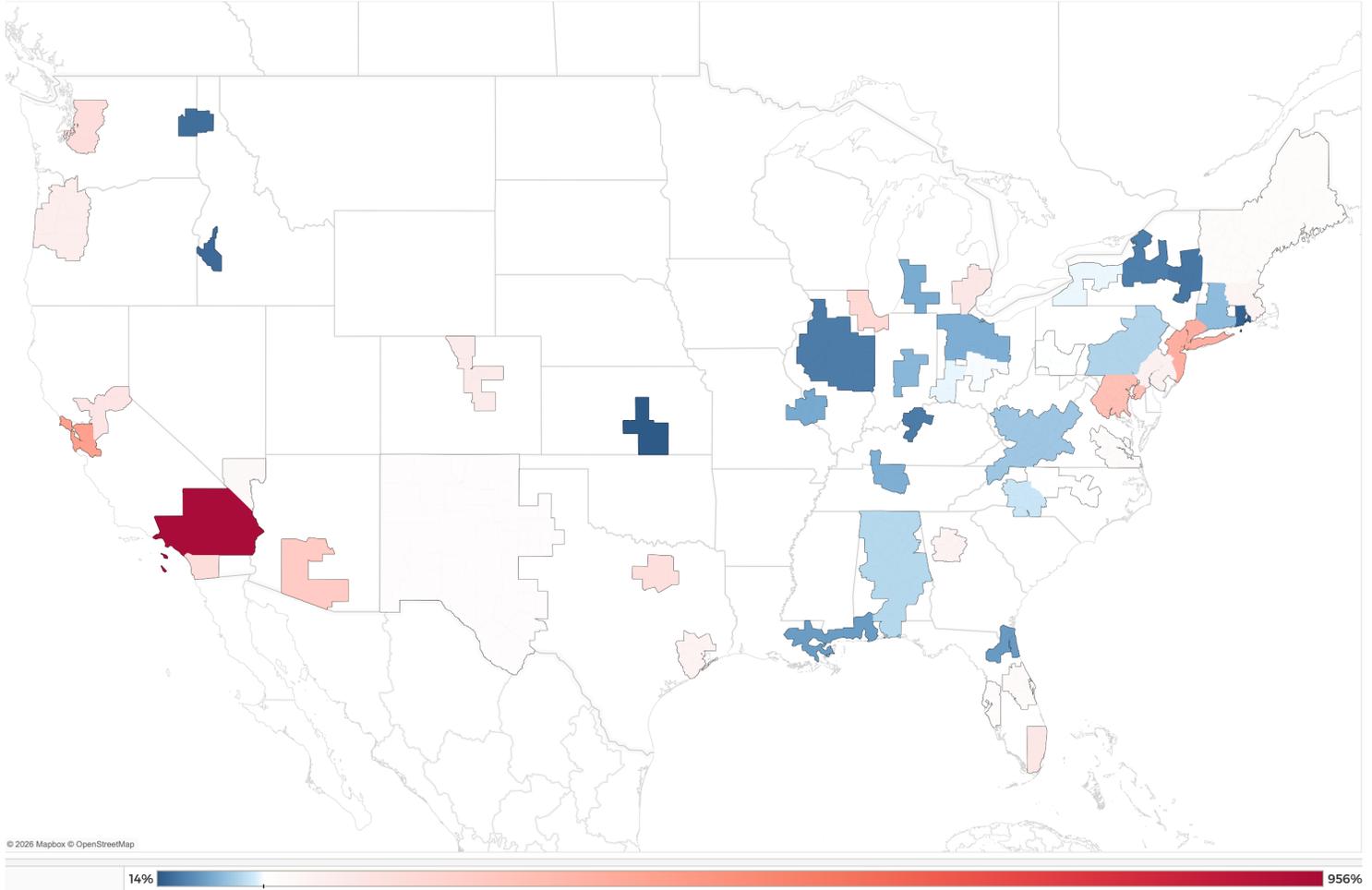


Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
SPOKANE	5,630,251	6,533,023	16.0%	NASHVILLE	22,928,333	23,512,469	2.5%
PORTLAND	28,418,801	32,533,460	14.5%	BOSTON	39,110,425	39,810,741	1.8%
LAS VEGAS	21,975,633	24,862,046	13.1%	TOLEDO	17,138,559	17,432,767	1.7%
DENVER	38,616,348	42,878,015	11.0%	CINCINNATI/DAYTON	31,859,860	32,228,777	1.2%
SEATTLE	30,235,721	33,399,838	10.5%	ALBANY	11,751,331	11,855,418	0.9%
HOUSTON	56,054,346	61,770,435	10.2%	NEW ORLEANS/MOBILE	27,721,082	27,854,663	0.5%
LOS ANGELES	160,835,277	174,933,376	8.8%	PEORIA/SPRINGFIELD	15,927,121	16,002,463	0.5%
WEST TEX/NEW MEXICO	39,530,032	42,762,353	8.2%	RICHMOND/NORFOLK	34,988,169	35,035,203	0.1%
PHOENIX/TUCSON	68,288,623	73,567,792	7.7%	ATLANTA	51,674,544	51,614,598	-0.1%
DALLAS/FT. WORTH	77,391,794	82,524,441	6.6%	PHILADELPHIA	63,721,719	63,519,875	-0.3%
GRAND RAPIDS	20,377,784	21,689,733	6.4%	COLUMBUS	22,954,327	22,869,666	-0.4%
SAN DIEGO	25,527,416	27,170,148	6.4%	PROVIDENCE	7,250,880	7,221,038	-0.4%
BOISE	6,184,390	6,563,534	6.1%	HARTFORD/SPRINGFIELD	34,386,435	34,046,070	-1.0%
RALEIGH/GREENSBORO	44,919,634	47,548,525	5.9%	BIRMINGHAM/MONTGOMERY	35,691,733	35,258,934	-1.2%
HARRISBURG/SCRANTON	41,939,276	44,278,495	5.6%	NEW ENGLAND	29,023,547	28,648,169	-1.3%
WICHITA	9,245,875	9,730,218	5.2%	ROANOKE	26,186,350	25,750,568	-1.7%
BUFFALO/ROCHESTER	25,858,144	27,039,654	4.6%	SAN FRANCISCO	47,244,119	46,188,509	-2.2%
CHARLOTTE	36,508,621	37,983,996	4.0%	ST. LOUIS	27,817,990	27,153,035	-2.4%
SACRAMENTO	31,495,660	32,716,844	3.9%	PITTSBURGH	24,430,730	23,841,799	-2.4%
ORLANDO	31,010,790	32,204,218	3.8%	LOUISVILLE	15,104,102	14,718,816	-2.6%
DETROIT	46,350,686	47,990,149	3.5%	BALTIMORE/WASHINGTON	94,766,089	91,816,755	-3.1%
SYRACUSE	12,571,071	12,986,825	3.3%	NEW YORK	175,950,950	168,658,815	-4.1%
INDIANAPOLIS	26,209,227	27,043,197	3.2%	MIAMI/FT. LAUDERDALE	39,507,898	37,623,229	-4.8%
JACKSONVILLE	15,924,172	16,420,563	3.1%	CHICAGO	82,145,827	76,214,622	-7.2%
TAMPA	29,695,159	30,538,497	2.8%				



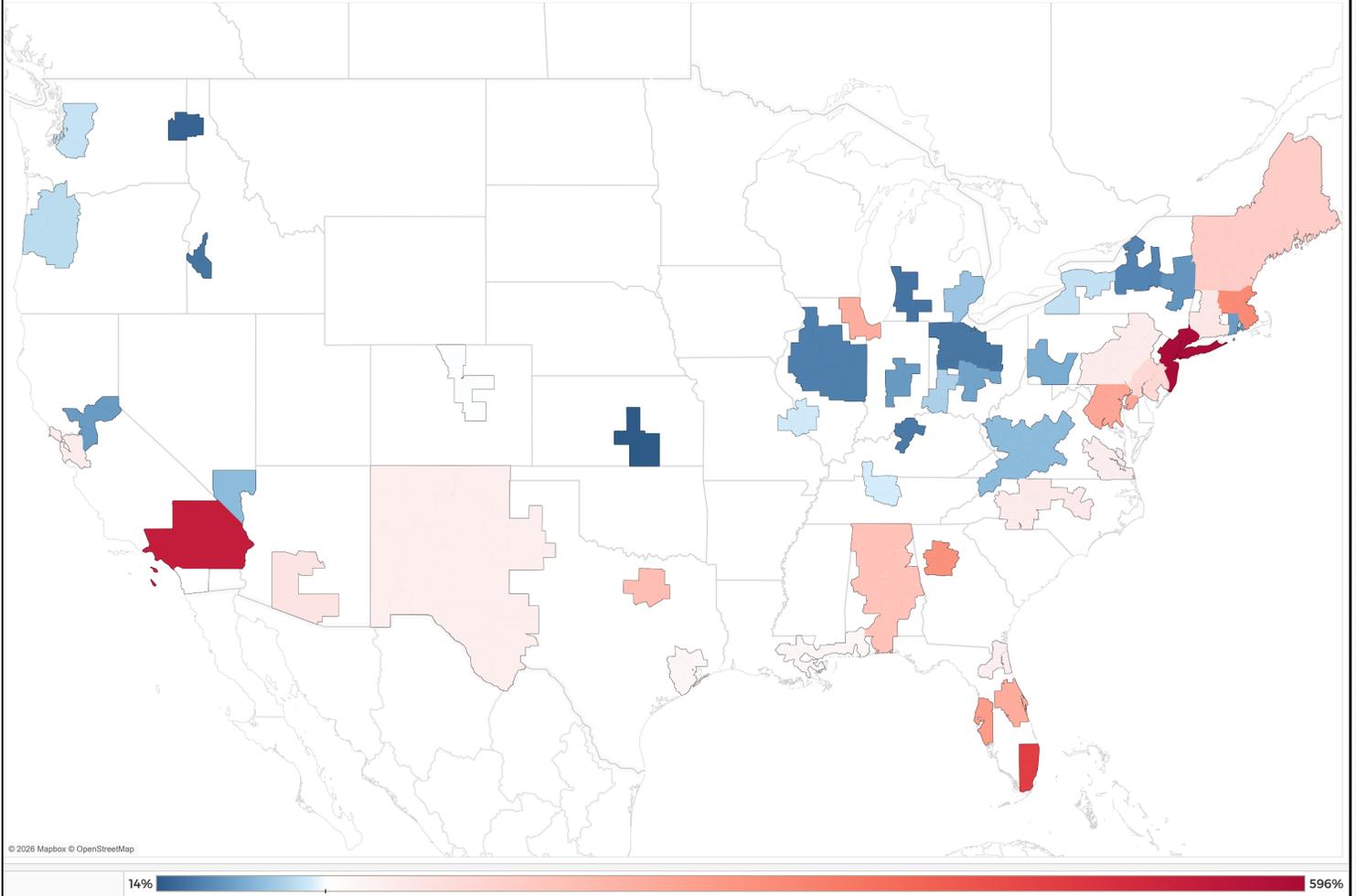
# Scanner Data Markets — Mini

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



Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	6,631,033	8,808,680	32.8%	NEW ENGLAND	4,209,860	4,304,609	2.3%
ST. LOUIS	1,682,815	2,225,830	32.3%	CHARLOTTE	3,437,792	3,486,739	1.4%
PITTSBURGH	3,369,452	3,926,778	16.5%	WEST TEX/NEW MEXICO	4,185,021	4,240,733	1.3%
BUFFALO/ROCHESTER	3,264,238	3,801,420	16.5%	GRAND RAPIDS	2,240,269	2,269,727	1.3%
PROVIDENCE	640,142	736,325	15.0%	PORTLAND	5,967,489	6,018,459	0.9%
PHILADELPHIA	4,875,795	5,582,289	14.5%	TOLEDO	2,325,035	2,340,585	0.7%
BALTIMORE/WASHINGTON	10,998,494	12,229,352	11.2%	DETROIT	6,761,351	6,769,912	0.1%
PEORIA/SPRINGFIELD	1,177,127	1,296,164	10.1%	HARTFORD/SPRINGFIELD	2,663,409	2,627,857	-1.3%
SPOKANE	928,002	1,019,187	9.8%	SEATTLE	8,166,981	8,051,157	-1.4%
ROANOKE	2,626,876	2,874,723	9.4%	RICHMOND/NORFOLK	4,481,308	4,383,579	-2.2%
LOUISVILLE	1,198,851	1,303,908	8.8%	ORLANDO	4,621,382	4,494,194	-2.8%
SAN DIEGO	7,536,203	8,185,381	8.6%	BIRMINGHAM/MONTGOMERY	3,304,880	3,213,910	-2.8%
JACKSONVILLE	1,799,051	1,944,241	8.1%	RALEIGH/GREENSBORO	4,068,497	3,939,285	-3.2%
SACRAMENTO	6,616,986	7,096,183	7.2%	NASHVILLE	2,446,032	2,356,599	-3.7%
NEW YORK	13,616,189	14,495,659	6.5%	INDIANAPOLIS	2,612,194	2,511,572	-3.9%
LOS ANGELES	35,510,828	37,661,834	6.1%	ATLANTA	5,641,845	5,299,386	-6.1%
SYRACUSE	1,288,489	1,362,821	5.8%	LAS VEGAS	5,046,000	4,729,551	-6.3%
ALBANY	1,123,482	1,186,967	5.7%	TAMPA	4,654,726	4,357,785	-6.4%
SAN FRANCISCO	15,630,600	16,479,164	5.4%	DALLAS/FT. WORTH	8,424,951	7,833,092	-7.0%
HARRISBURG/SCRANTON	2,994,689	3,147,811	5.1%	PHOENIX/TUCSON	11,575,204	10,755,648	-7.1%
BOSTON	4,940,317	5,191,902	5.1%	HOUSTON	5,868,413	5,410,525	-7.8%
NEW ORLEANS/MOBILE	1,888,773	1,984,607	5.1%	WICHITA	637,498	564,150	-11.5%
CINCINNATI/DAYTON	3,622,288	3,795,841	4.8%	MIAMI/FT. LAUDERDALE	7,731,092	6,841,127	-11.5%
COLUMBUS	3,772,874	3,888,321	3.1%	DENVER	7,255,351	6,369,193	-12.2%
BOISE	905,131	930,058	2.8%				

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



Largest % Increase				Rest of Markets			
	Prior #	Current #	% Change	Prior #	Current #	% Change	
ST. LOUIS	3,034,222	3,682,134	21.4%	ATLANTA	13,164,576	12,646,285	-3.9%
TOLEDO	1,018,777	1,221,063	19.9%	JACKSONVILLE	5,467,768	5,206,421	-4.8%
INDIANAPOLIS	1,698,397	1,981,921	16.7%	TAMPA	12,463,293	11,857,623	-4.9%
PEORIA/SPRINGFIELD	1,200,979	1,392,547	16.0%	HARTFORD/SPRINGFIELD	6,084,874	5,748,465	-5.5%
LOUISVILLE	1,132,859	1,291,929	14.0%	WEST TEX/NEW MEXICO	5,522,659	5,180,454	-6.2%
SACRAMENTO	1,804,343	1,999,292	10.8%	NEW YORK	25,728,226	24,041,738	-6.6%
SYRACUSE	1,374,261	1,521,188	10.7%	CHICAGO	11,497,516	10,478,816	-8.9%
ROANOKE	2,420,846	2,666,556	10.1%	NEW ORLEANS/MOBILE	5,264,028	4,655,198	-11.6%
BUFFALO/ROCHESTER	3,177,415	3,495,104	10.0%	NEW ENGLAND	9,117,975	7,919,502	-13.1%
COLUMBUS	1,976,196	2,170,457	9.8%	DENVER	4,916,556	4,010,067	-18.4%
CINCINNATI/DAYTON	2,858,490	3,138,439	9.8%	PHOENIX/TUCSON	7,515,223	5,949,667	-20.8%
ALBANY	1,726,162	1,879,060	8.9%	PROVIDENCE	2,590,313	2,026,417	-21.8%
CHARLOTTE	4,894,927	5,301,468	8.3%	BALTIMORE/WASHINGTON	13,986,126	10,933,534	-21.8%
RICHMOND/NORFOLK	4,831,233	5,209,701	7.8%	HOUSTON	6,148,100	4,629,372	-24.7%
WICHITA	545,317	583,045	6.9%	BOSTON	17,690,938	13,233,345	-25.2%
NASHVILLE	3,527,694	3,728,208	5.7%	PHILADELPHIA	9,502,094	6,863,203	-27.8%
DETROIT	2,777,636	2,874,895	3.5%	LAS VEGAS	3,726,751	2,654,334	-28.8%
BIRMINGHAM/MONTGOMERY	8,466,443	8,708,503	2.9%	LOS ANGELES	31,759,929	21,914,640	-31.0%
SAN FRANCISCO	5,214,813	5,330,703	2.2%	PORTLAND	5,014,071	3,371,382	-32.8%
MIAMI/FT. LAUDERDALE	18,642,292	18,970,416	1.8%	DALLAS/FT. WORTH	15,050,665	9,102,371	-39.5%
GRAND RAPIDS	1,150,120	1,166,909	1.5%	BOISE	1,941,392	1,169,347	-39.8%
RALEIGH/GREENSBORO	5,436,296	5,512,923	1.4%	SAN DIEGO	6,790,070	4,034,637	-40.6%
ORLANDO	10,559,033	10,576,010	0.2%	SEATTLE	6,160,931	3,521,005	-42.8%
PITTSBURGH	2,378,604	2,353,192	-1.1%	SPOKANE	1,476,653	814,269	-44.9%
HARRISBURG/SCRANTON	5,421,424	5,334,586	-1.6%				