



National
Watermelon
Promotion Board

Calendar Year 2025

Watermelon State of the Category

BASELINE STUDY





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EXECUTIVE SUMMARY

On an annual basis, whole watermelon was the primary driver of retail volume (77% share adding +41M lbs.), while cut watermelon contributed a disproportionate share of dollar sales (49% share adding +\$117M). However, this dynamic is highly seasonal and closely tied to availability and execution.

Whole watermelon was not broadly available year-round, but when total watermelon distribution expanded during the Spring/Summer season, whole became the dominant engine of both volume and dollar sales, with volume (lbs.) share peaking at 86% during June and July. During the Spring/Summer season, whole watermelon delivered larger volume (+75%) and dollar (+50%) lift on smaller discounts compared to other melon varieties and received heavier promotional support. As a result, whole watermelon was not only the top sales driver for retailers during peak season, but it also outperformed other melons when promoted, reinforcing its role as the category's core growth driver. This performance demonstrates that promoting whole watermelon delivers strong benefits for retailers, even outside traditional holiday windows.

In contrast, cut watermelon played a more critical role in the fall and winter months. While overall watermelon promotion declined compared to the Spring/Summer season, promotional focus shifted toward cut watermelon. With 30% of cut volume (lbs.) promoted, cut delivered stronger promotional performance than whole watermelon on meaningfully smaller discounts. This positions cut watermelon as a powerful seasonal sales driver when whole fruit availability is lower, provided it receives adequate visibility and support.

Regionally, the watermelon category showed the highest level of development in the Midsouth and Plains, while California, Northeast, and South Central regions trail behind. Long-term growth trends were positive across all regions except California and the West. Pricing dynamics also varied significantly by region. Cut watermelon prices ranged from +835% higher than whole watermelon in the Great Lakes to +528% higher in the Northeast, highlighting wide differences in value perception and execution. Similarly, pricing between seeded and seedless watermelon fluctuated sharply, ranging from a +102% seeded price premium in the Plains to a -58% seeded lower price in the Southeast.

From a distribution perspective, whole watermelon maintained over 90% distribution across all regions over the last 52 weeks. Cut watermelon distribution was more variable, ranging from 93% in the Plains to 83% in the Northeast. Seedless watermelon has broad national availability, with distribution above 91% in all regions, while seeded watermelon distribution lagged, ranging from 84% in South Central and West to just 58% in the Southeast, limiting its growth potential.

Overall, the data reinforces a clear seasonal strategy: prioritize and amplify whole watermelon during spring and summer as the category's primary growth engine, while leveraging cut watermelon strategically during fall and winter when it can deliver strong performance on smaller discounts. Aligning promotion, pricing, and distribution to these seasonal roles is critical to unlocking incremental category growth.



KEY ACTIONS AND OPPORTUNITIES

Drive Results with Watermelon Promotions

Whole watermelon delivers strong performance even outside traditional holiday windows.

During the spring/summer season, whole watermelon generated strong volume (+75%) and dollar (+50%) lift while requiring a smaller average discount than other melon varieties.

- Whole cantaloupe delivered a +42% volume lift on a -24% discount
- Whole honeydew delivered a +22% volume lift on a -24% discount

Whole watermelon was also promoted more heavily during the season, with 62.9% of volume sold on promotion, compared to 52.1% for cantaloupe and 36.1% for honeydew.

This creates an opportunity to extend whole watermelon promotional activity beyond traditional holiday windows, using non-holiday features, displays, and secondary placements to drive incremental category growth.

Optimize Seasonal Strengths of Whole and Cut Watermelon to Maximize Retail Sales

Whole watermelon serves as the primary sales engine during spring/summer, while cut watermelon plays a larger role during the fall/winter season.

When whole watermelon is widely available during spring/summer, it drives the majority of category volume and dollar sales while also delivering strong promotional performance. In contrast, during the fall and winter season, cut watermelon becomes the primary driver of retail dollars and promotional activity when whole watermelon is not as widely available.

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

Regional Opportunities: Adapt Strategy for Developed and Emerging Regions

Watermelon category development varies by region, with stronger development in the Midsouth and Plains and lower development in California, the Northeast, and South Central.

While most regions have seen long-term growth, California and the West have lagged. The Plains region led the country with a +17% increase in volume compared to 2021, while California declined by -9%.

The Northeast also shows lower overall category development, but delivers the highest sales velocity for cut watermelon. However, cut distribution is lowest in the Northeast, highlighting a clear opportunity to expand availability and drive additional sales.

Pricing and distribution also vary widely by region, highlighting opportunities to better align category dynamics and address emerging markets to drive consistent performance nationwide.

Visit Watermelon.org for more retail and consumer research that can identify opportunities and help pave the way for the next surge in category growth.



KEY INSIGHTS

P. 10 Watermelon retail volume (lbs.) sales drove melon category growth since 2021, climbing +4% and outperforming all other melon varieties combined.

P. 11 Watermelon held a 63% share of category volume during the 52-week period, while year-over-year growth was flat (-0.8%).

P. 14 Over the most recent 52 weeks, 79% of watermelon volume (lbs.) sales were from whole watermelon. Growing +6% since 2021, whole watermelon gained +2 points of watermelon volume (lbs.) share over the 4-year period.

P. 16 Cut watermelon had the lowest distribution (89% ACV) of all forms of watermelon yet gained nearly +3-points during the last 52-week period.

P. 17 Seeded watermelon has gained +2 points of volume (lbs.) share since 2021, with a 4-year growth rate of nearly +42%.

P. 18 Seeded watermelon retail sales generated +34M incremental pounds during the 52 weeks, recording a growth rate of +16%.

P. 24 Watermelon retail volume (lbs.) sales during the Spring/Summer season have generated an increase of +5% since 2021, while the Fall/Winter season grew by +2%.

P. 25 The spring/summer and fall/winter seasons both declined in volume (lbs.) vs. prior year, while the Spring/Summer posted dollar gains of +\$73M. The Fall/Winter season saw a dollar decline of -\$18M.

P. 29, 31 Nearly 63% of whole watermelon volume was sold on promotion during the Spring/Summer season, compared to 17% during the Fall/Winter season.

P. 37 The Plains region saw an +7-point increase in watermelon category development during the last 52 weeks.

P. 38 Since 2021, the Plains region has recorded a +17% surge in watermelon volume (lbs.) growth, while the Southeast region led in dollars (+39%).

P. 49 The South Carolina market ranked highest in watermelon volume (lbs.) sales growth at +19% in volume (lbs.) and +48% in dollars since 2021.



TERMS AND DEFINITIONS

Geographies

- **Total U.S.**
- **8 Regions:** California, West, Plains, South Central, Great Lakes, Northeast, Midsouth, Southeast
- **Top 10 Watermelon Markets by lbs. sold:** New York, Los Angeles, Baltimore/D.C., Dallas/Ft. Worth, Chicago, South Carolina, Phoenix/Tucson, Philadelphia, Houston, and Atlanta

Timeframes

- **2025 (CY):** 52 weeks ending 12-28-2025
- **2024 (PY):** 52 weeks ending 12-29-2024
- **2021:** 52 weeks ending 1-2-2022
- **Seasons**
Fall/Winter: 24 weeks ending 03-23-2025
Spring/Summer: 28 weeks ending 10-05-2025

Products

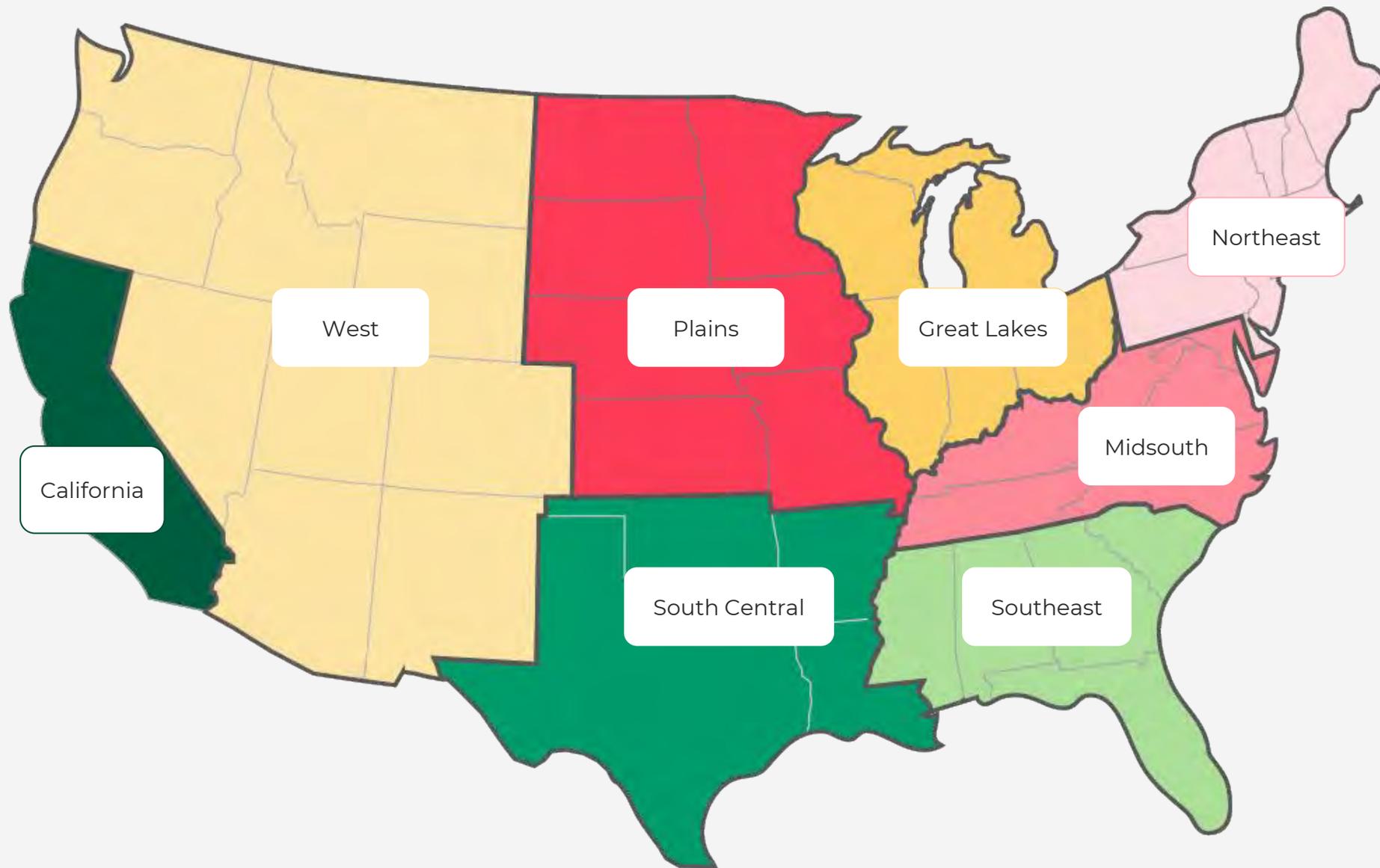
- **Total Melons:** Watermelon, Cantaloupe, Honeydew, Mixed, and All Other Melons
- **Watermelon Types:** Whole, Cut, Mini, Seedless, and Seeded
- **All Other Melons:** Hybrid, Muskmelon, Oriental, Pepino, Specialty, and AO melons as classified by Circana

Measures — all metrics are rounded

- **Retail Dollar, Units, or Volume (lbs.) Sales**
1,000M = 1 billion.
- **Dollar, Unit, or Volume (lbs.) Share**
Proportion of total sales.
- **Average Selling Price (ASP)**
Retail dollar sales/retail units.
- **Incremental Dollars, Units, or Volume (lbs.)**
Current retail sales minus prior period retail sales.
- **Promoted Dollars or Volume (lbs.)**
Portion of goods sold at a price reduction and/or on feature.
- **Non-Promoted Dollars or Volume (lbs.)**
Portion of goods sold without a price reduction and/or off feature.
- **Promoted ASP/lb.**
Retail dollar sales sold with promotion/retail volume (lbs.) sold with promotion.
- **Non-promoted ASP/lb.**
Retail dollar sales sold without promotion/retail volume (lbs.) sold without promotion.
- **Average Promoted Discount**
Percentage difference between promoted ASP and non-promoted ASP.
- **% Promoted Dollar or Volume (lbs.) Lift**
Percentage increase between base dollars/volume (lbs.) and incremental dollars/volume (lbs.). Base sales are expected sales in absence of promotion.
- **All Commodity Volume (ACV)**
Dollar sales of everything scanned in store(s). See slide 8 for further explanation.
- **ACV Weighted Distribution**
Percent of stores selling the category (weighted by ACV). See slide 8.
- **\$/MM ACV**
Watermelon sales rate in stores where stocked (sales velocity). Shows dollars spent on the category for every \$1M dollars spent in store overall. See slide 8.
- **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.



TERMS AND DEFINITIONS: REGION MAP





TERMS AND DEFINITIONS

ALL COMMODITY VOLUME (ACV) WEIGHTED DISTRIBUTION AND SALES VELOCITY

Example: Total U.S. Watermelon % ACV Distribution			
	Store 1	Store 2	Store 3
Was watermelon scanned in this store?	No	Yes	Yes
Store ACV	\$50M	\$100M	\$150M

= **\$250M**

Example: Watermelon Sales Velocity	
Total Watermelon Dollar Sales	\$10,000
Total Watermelon Volume (lbs.) Sales	5,000
Total ACV (\$)	\$250M

Total U.S. ACV

\$50M + \$100M + \$150M = \$300 Million

Unweighted Distribution:

% of stores selling watermelon
2 ÷ 3 = 67%

ACV Weighted Distribution:

% of ACV
\$250M ÷ \$300M = 83%

Watermelon was sold in 67% of stores (2 out of 3) and was sold in stores that account for 83% of Total U.S. ACV.

Total Dollar Sales Velocity

\$10,000 ÷ **\$250** = \$40/\$MM ACV

Total lbs. Sales Velocity

5,000 ÷ **250** = 20 lbs./\$MM ACV

Watermelon dollar sales were \$10,000 in stores where watermelon was sold (83% of ACV). Those stores reported an ACV of \$250M. This means watermelon sold at a rate of \$40 per \$1M in Total ACV.

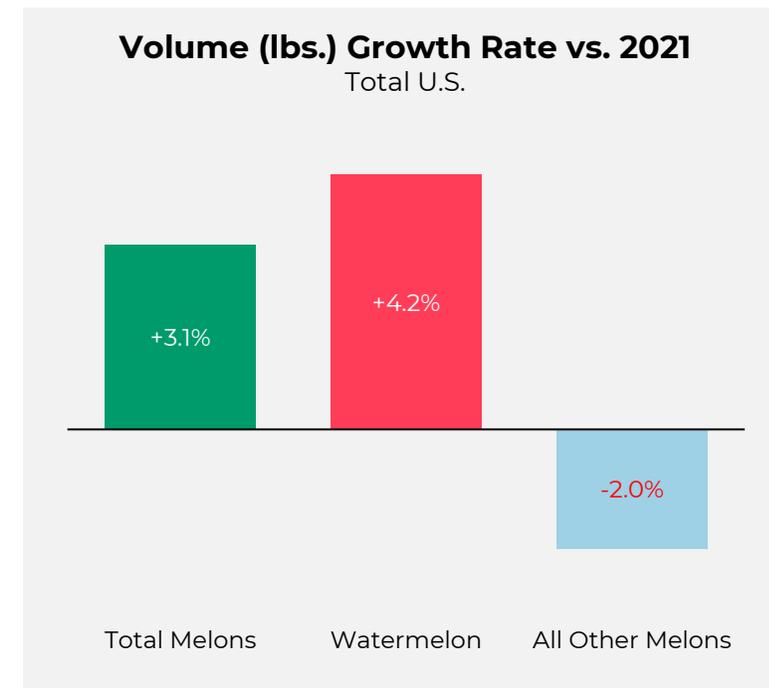
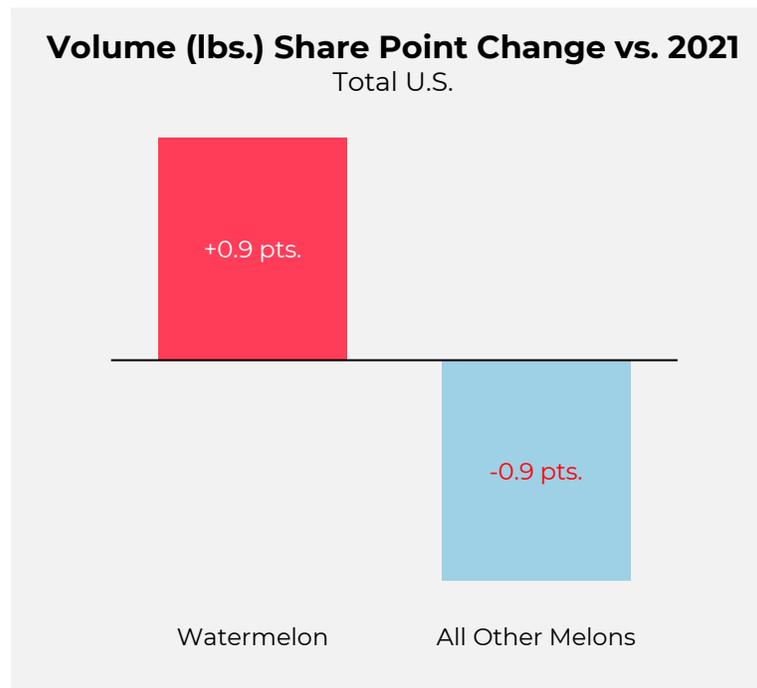
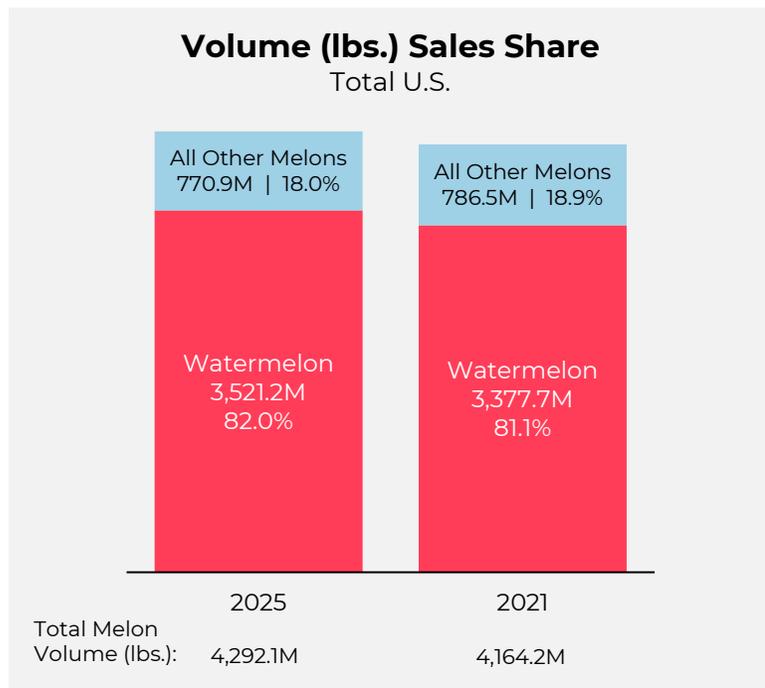


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MELON CATEGORY OVERVIEW



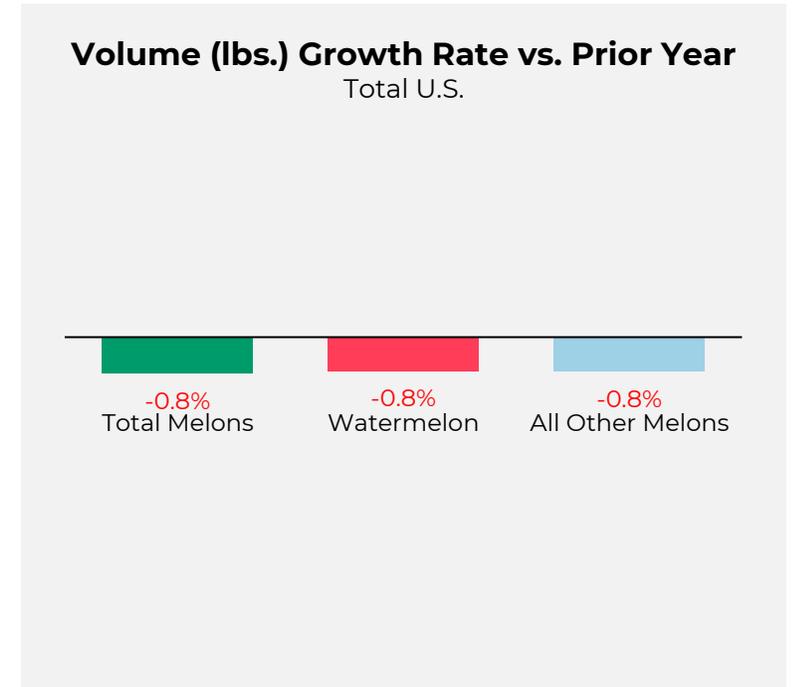
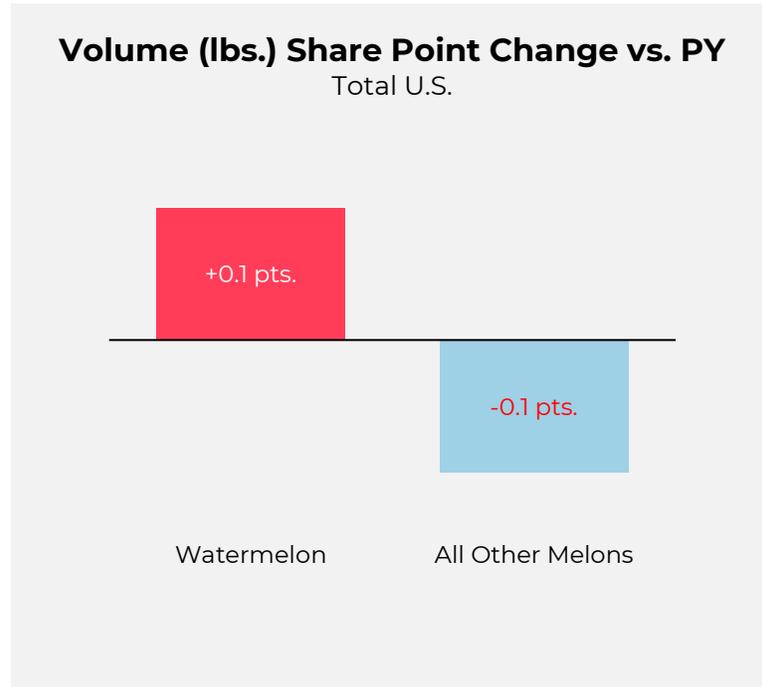
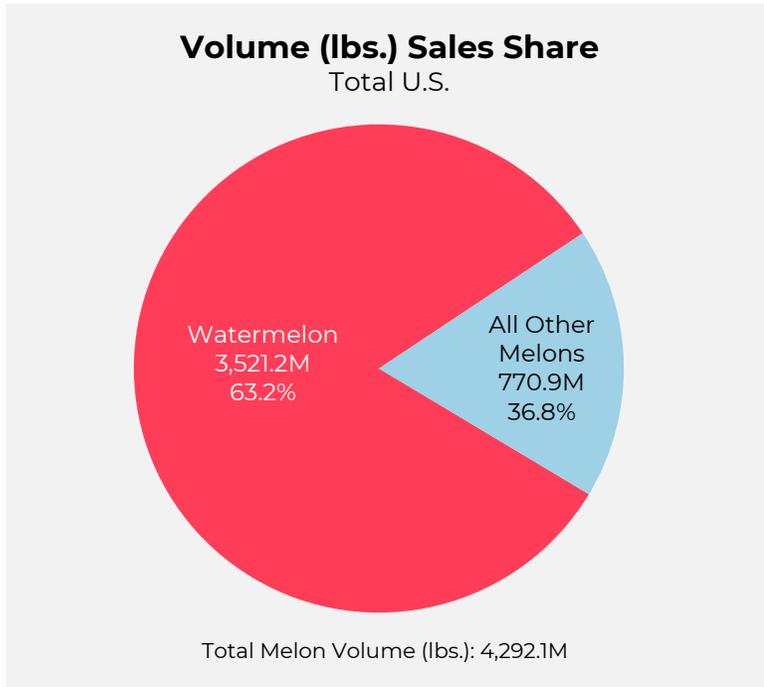
Over the last four years, watermelon retail sales have fueled long-term growth in the melon category



Dollar Sales Trends – Total U.S.			
	Total Melons	Watermelon	All Other Melons
Dollar Sales	\$3,860.1M	\$2,738.2M	\$1,121.9M
Dollar Share	100.0%	70.9%	29.1%
Share Change vs. 2021	n/a	+1.3 pts.	-1.3 pts.
Growth Rate vs. 2021	+22.5%	+24.8%	+17.3%



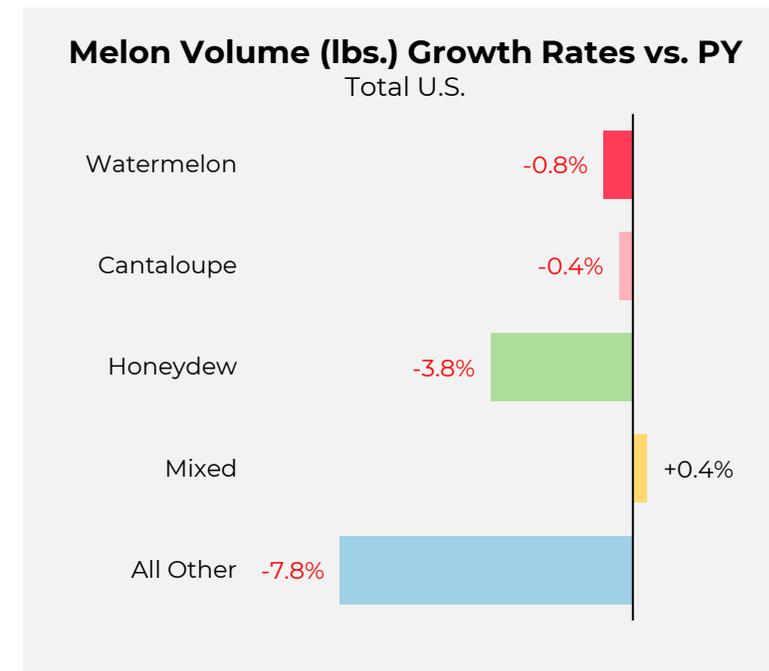
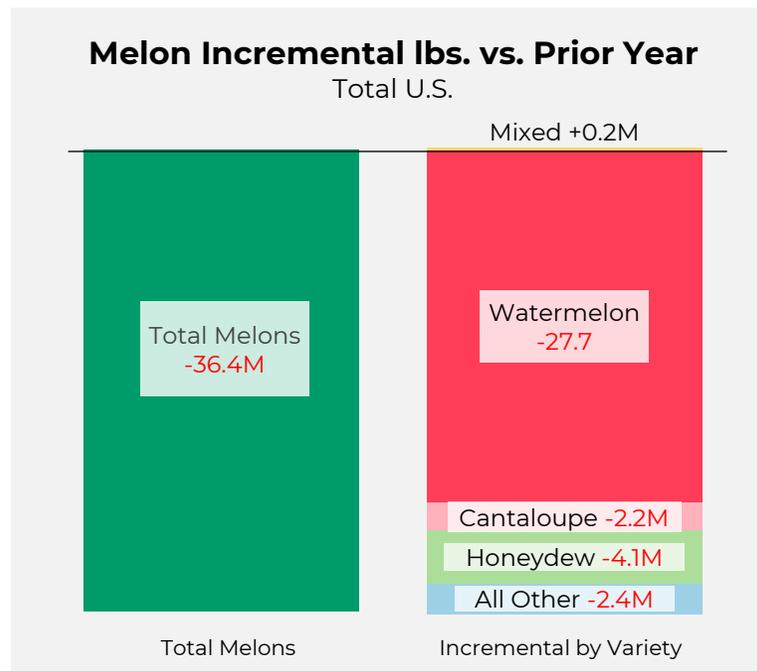
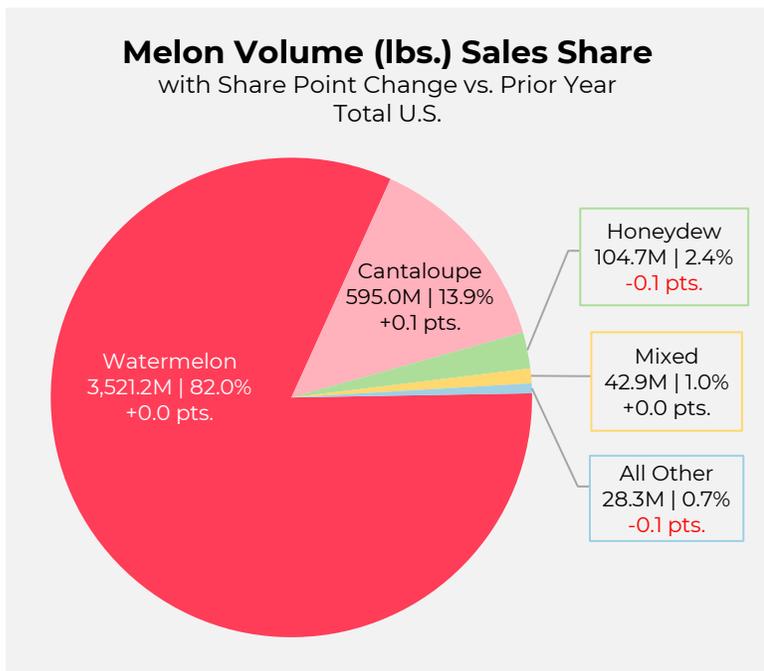
Watermelon retail volume (lbs.) was relatively flat vs. prior year, while dollars increased +3%



Dollar Sales Trends – Total U.S.			
	Total Melons	Watermelon	All Other Melons
Dollar Sales	\$3,860.1M	\$2,738.2M	\$1,121.9M
Dollar Share	100.0%	70.9%	29.1%
Share Change vs. PY	n/a	+0.1 pts.	-0.1 pts.
Growth Rate vs. PY	+3.1%	+3.4%	+2.6%



While volume was flat, watermelon dollar sales increased +\$89M, accounting for 75% of positive incremental dollars for the total melon category



Melon Dollar Sales Trends – Total U.S.					
	Watermelon	Cantaloupe	Honeydew	Mixed	All Other
Dollar Sales	\$2,738.2M	\$721.8M	\$170.6M	\$187.2M	\$42.4M
Dollar Share	70.9%	18.7%	4.4%	4.9%	1.1%
Share Change vs. PY	+0.1 pts.	+0.1 pts.	-0.2 pts.	+0.0 pts.	-0.0 pts.
Incremental Dollars	+\$88.9M	+\$24.2M	-\$0.9M	+\$6.0M	-\$0.4M
Growth Rate vs. PY	+3.4%	+3.5%	-0.5%	+3.3%	-1.0%

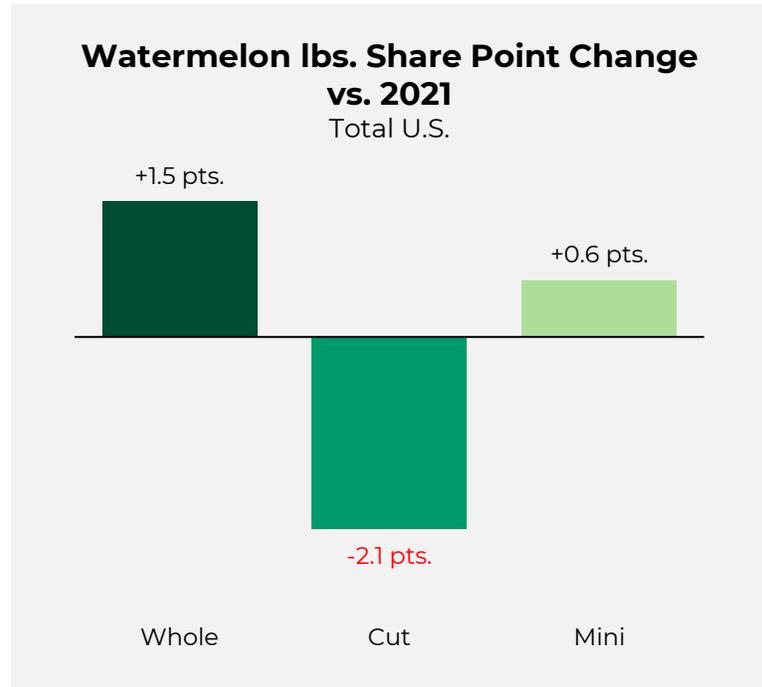
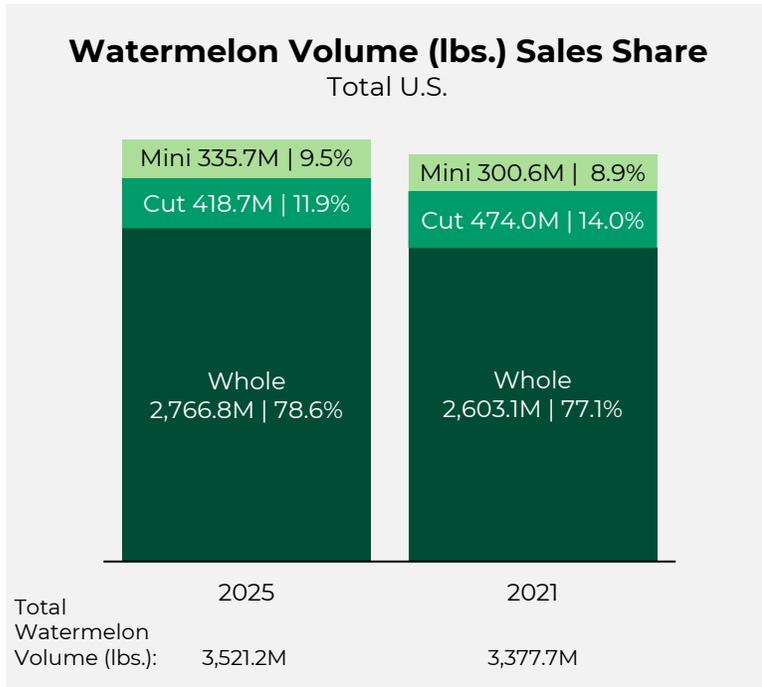


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WATERMELON ATTRIBUTES OVERVIEW



Whole watermelon drove volume growth over the past four years. However, cut watermelon drove dollar growth with an increase of +41%, generating +\$386M in incremental sales



Watermelon Dollar Sales Trends – Total U.S.			
	Whole	Cut	Mini
Dollar Sales	\$1,137.7M	\$1,335.5M	\$265.0M
Dollar Share	41.5%	48.8%	9.7%

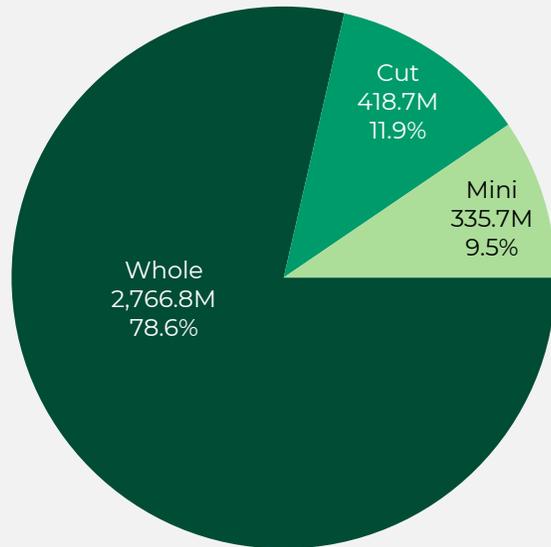
Watermelon Dollars vs. 2021 – Total U.S.			
	Whole	Cut	Mini
Incremental Dollars	+\$100.5M	+\$386.4M	+\$57.0M
Dollar Share Pt. Change	-5.7 pts.	+5.5 pts.	+0.2 pts.
Dollar Growth Rate	+9.7%	+40.7%	+27.4%



During the last 52 weeks, cut watermelon volume (lbs.) declined -16%, while dollars increased +10%

Watermelon Volume (lbs.) Sales Share

Total U.S.



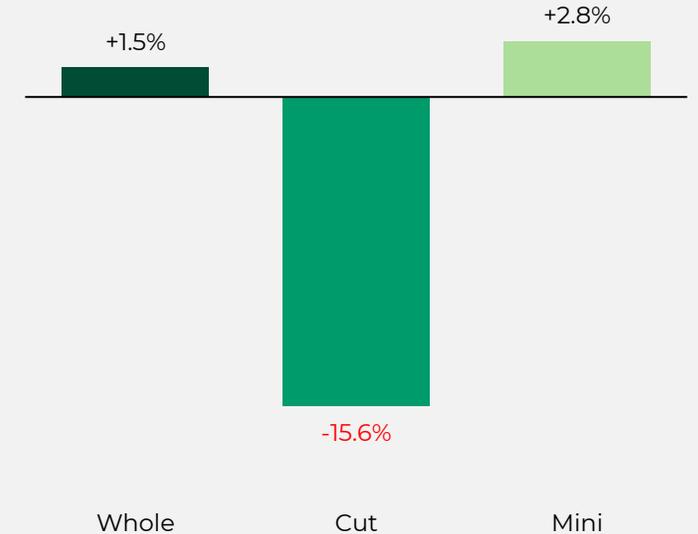
Watermelon Incremental lbs. vs. Prior Year

Total U.S.



Watermelon lbs. Growth Rate vs. Prior Year

Total U.S.

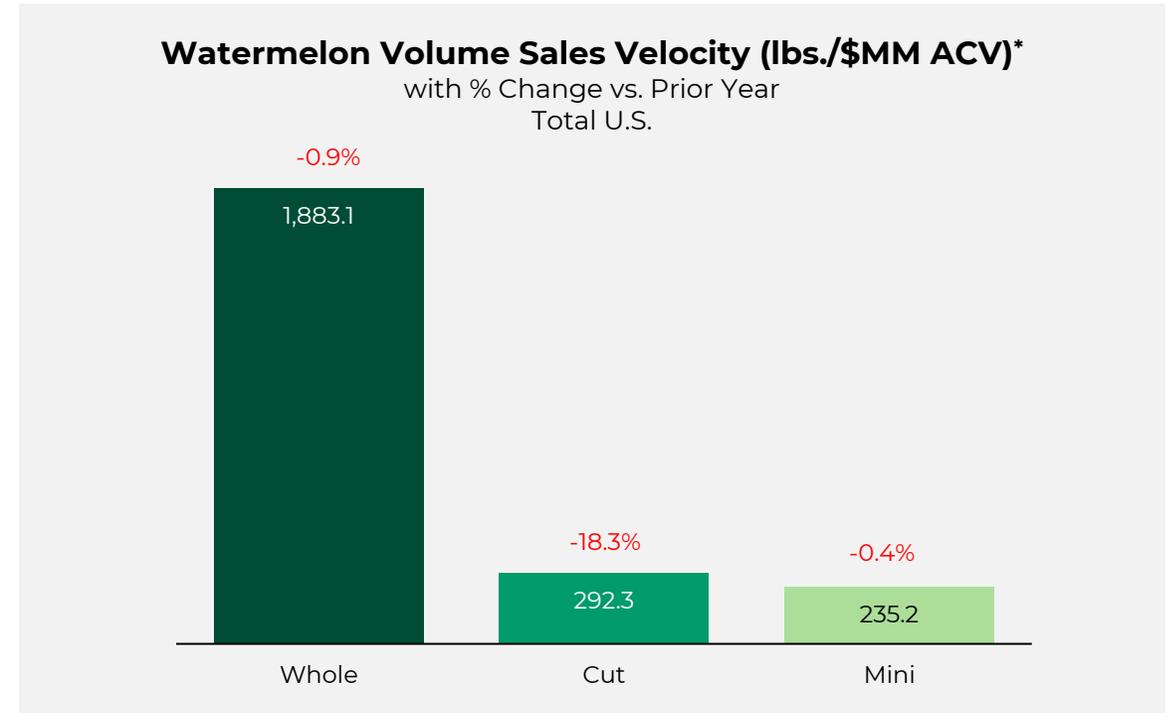
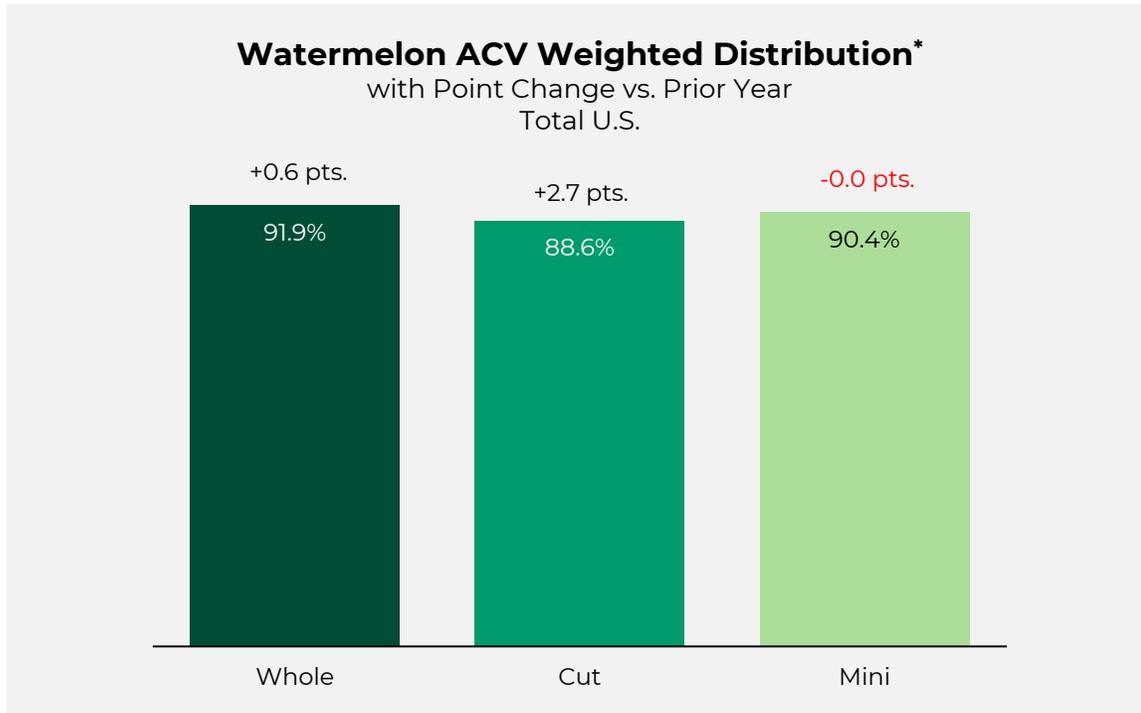


Watermelon Dollar Sales and Share – Total U.S.			
	Whole	Cut	Mini
Dollar Sales	\$1,137.7M	\$1,335.5M	\$265.0M
Dollar Share	41.5%	48.8%	9.7%

Watermelon Dollars vs. Prior Year – Total U.S.			
	Whole	Cut	Mini
Incremental Dollars	-\$25.9M	+\$117.0M	-\$2.2M
Dollar Share Pt. Change	-2.4 pts.	+2.8 pts.	-0.4 pts.
Dollar Growth Rate	-2.2%	+9.6%	-0.8%



Whole watermelon is in higher distribution and has higher volume velocity than cut or mini watermelon

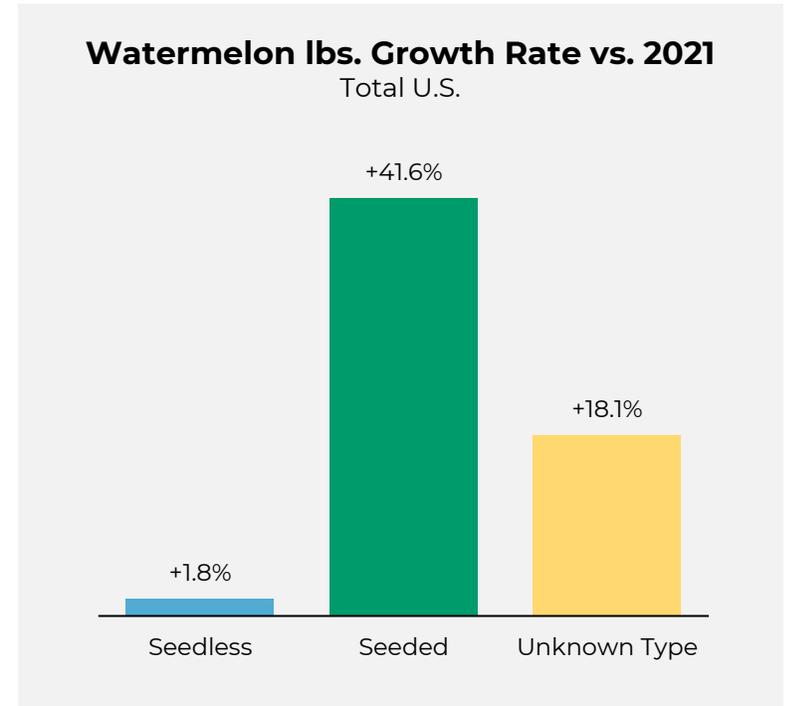
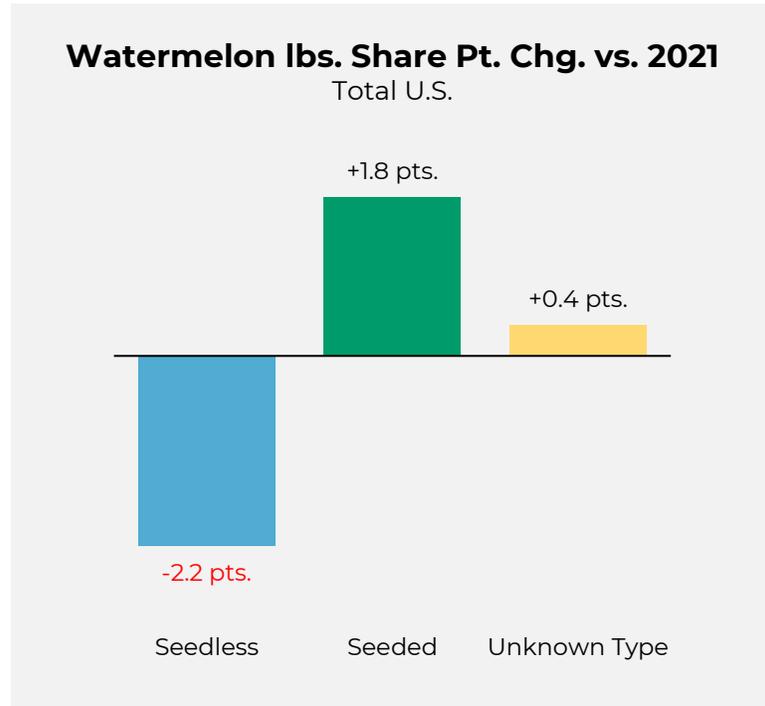
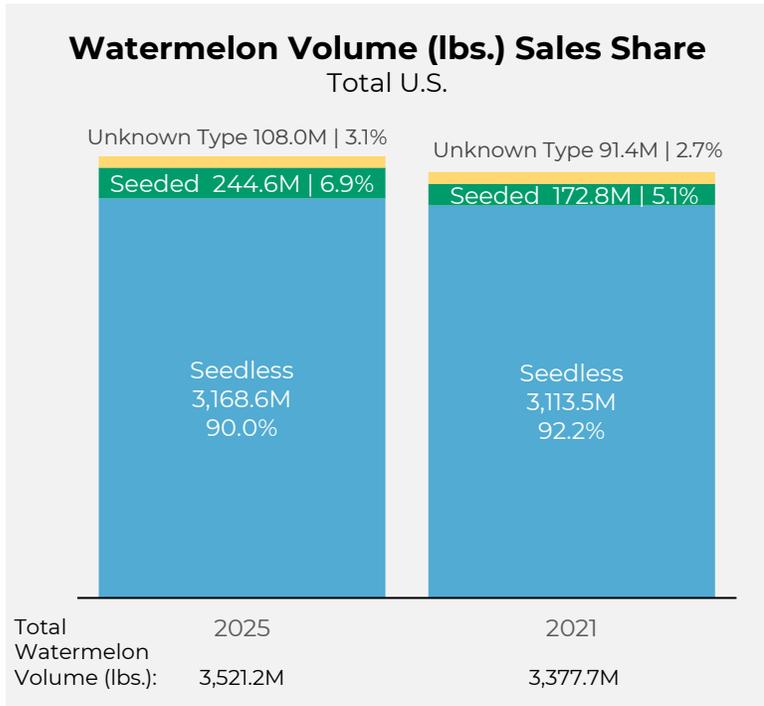


Watermelon Sales Velocity (\$MM ACV)* with % Change vs. Prior Year			
	Whole	Cut	Mini
Dollars	\$801.7 -4.3%	\$937.3 +5.5%	\$185.8 -3.8%

* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$MM ACV)
Source: Circana, 2025 vs. prior year



Over the past four years, seedless watermelon drove total volume, while seeded saw rapid growth

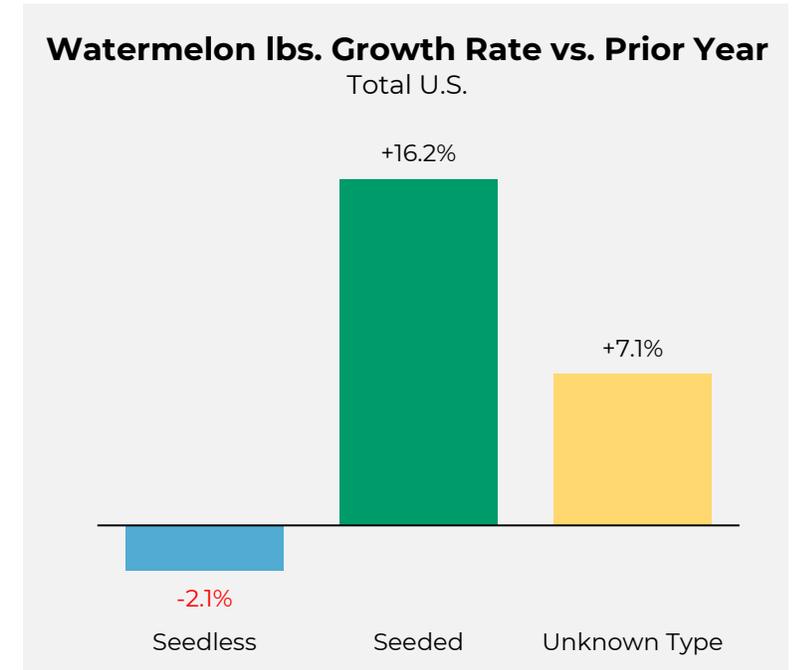
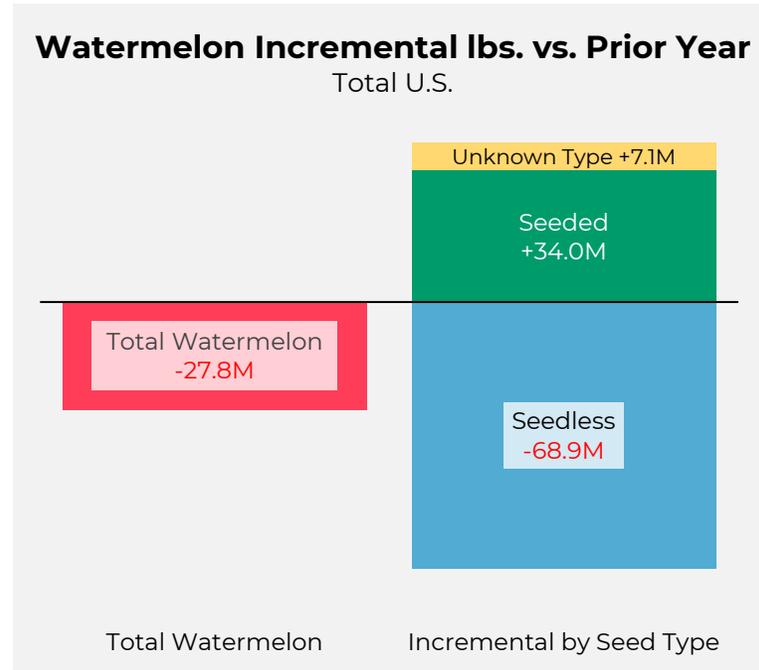
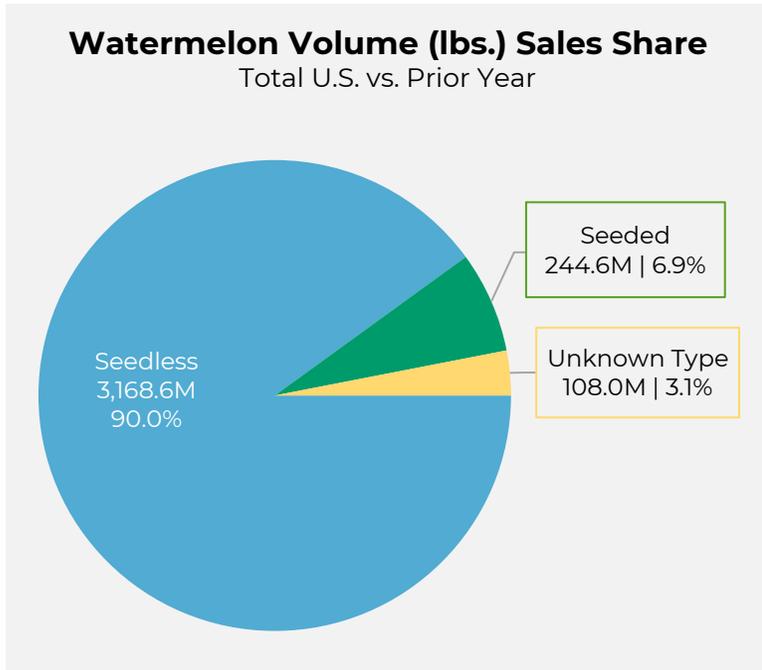


Watermelon Dollar Sales Trends – Total U.S.			
	Seedless	Seeded	Unknown Type
Dollar Sales	\$2,155.9M	\$138.4M	\$443.9
Dollar Share	78.7%	5.1%	16.2%

Watermelon Dollars vs. 2021 – Total U.S.			
	Seedless	Seeded	Unknown Type
Incremental Dollars	+\$396.0M	+\$36.0M	+\$112.0M
Dollar Share Pt. Change	-1.5 pts.	+0.4 pts.	+1.1 pts.
Dollar Growth Rate	+22.5%	+35.1%	+33.7%



Over the last 52 weeks, seeded watermelon continued to outpace seedless sales growth

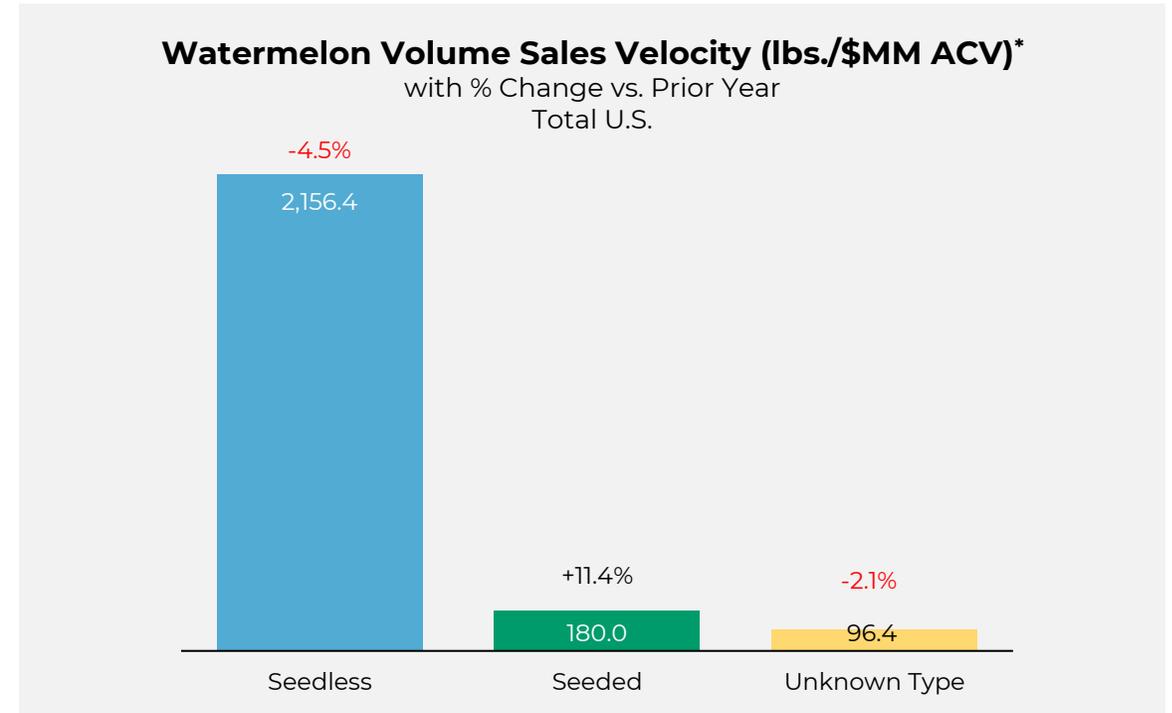
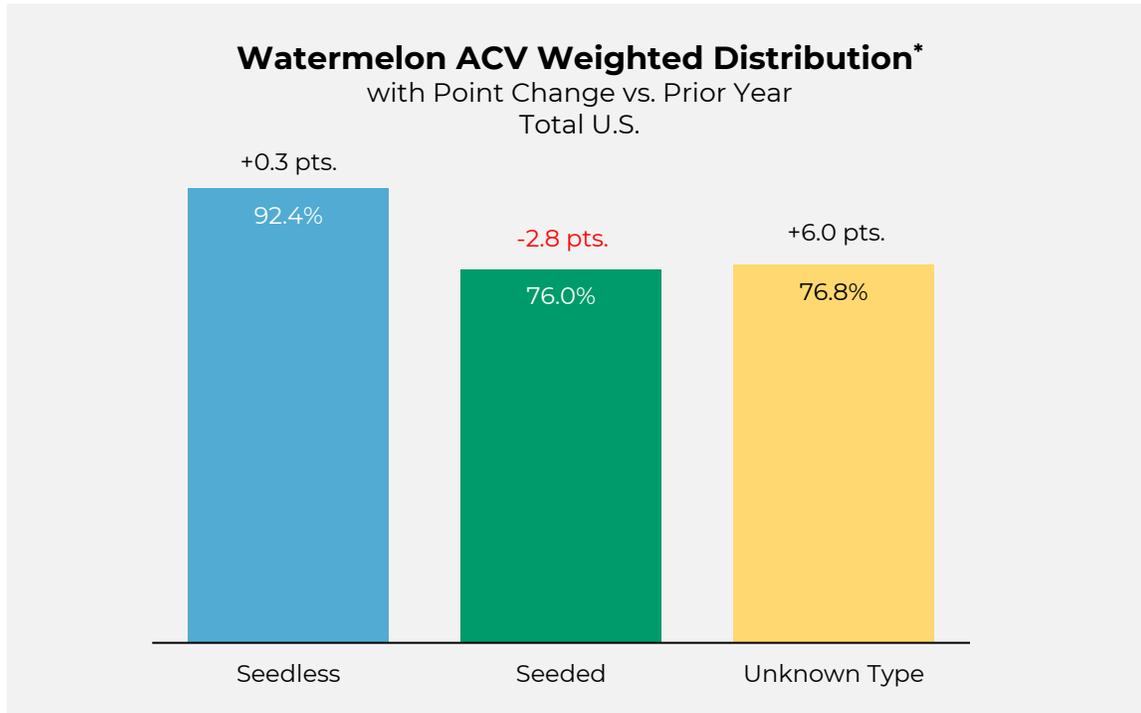


Watermelon Dollar Sales Trends vs. Prior Year – Total U.S.			
	Seedless	Seeded	Unknown Type
Dollar Sales	\$2,155.9M	\$138.4M	\$443.9
Dollar Share	78.7%	5.1%	16.2%

Watermelon Dollars vs. Prior Year – Total U.S.			
	Seedless	Seeded	Unknown Type
Incremental Dollars	+\$56.6M	+\$12.0M	+\$20.2M
Dollar Share Pt. Change	-0.5 pts.	+0.3 pts.	+0.2 pts.
Dollar Growth Rate	+2.7%	+9.5%	+4.8%



Seedless watermelon is in higher distribution and shows higher sales velocity than seeded



Watermelon Sales Velocity (\$MM ACV)* vs. PY – Total U.S.			
	Seedless	Seeded	Unknown Type
Dollars	\$1,466.2 -0.5%	\$103.2 +5.3%	\$402.5 -4.3%

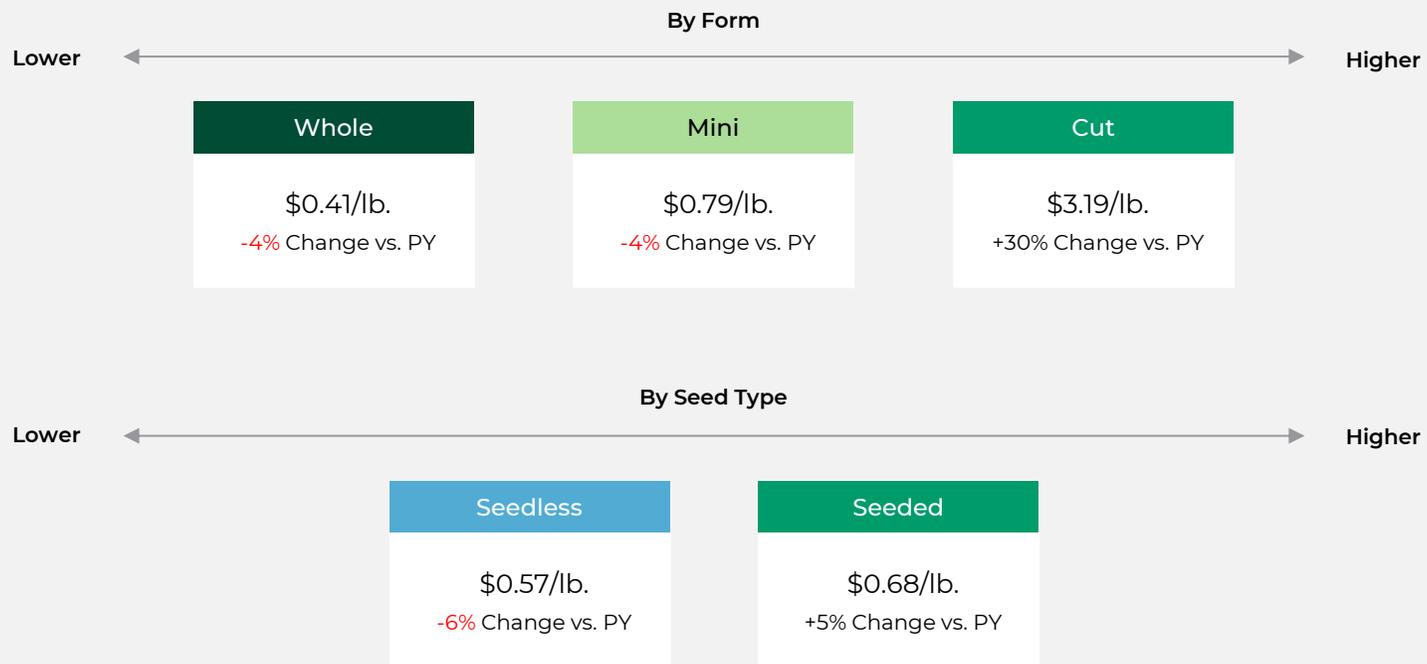
* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$MM ACV)
Source: Circana, 2025 vs. prior year



Cut watermelon shows a higher price premium compared to cut Cantaloupe and Honeydew

Watermelon Average Selling Price Per Pound (ASP/lb.)

with % Change vs. Prior Year





Cut watermelon shows a higher price premium compared to cut Cantaloupe and Honeydew

Melon Average Selling Price Per Pound (ASP/lb.) by Form with Price Gap

Lower ASP ← → Higher ASP

Watermelon	Cantaloupe	Honeydew
Whole \$0.41/lb.	Whole \$0.76/lb.	Whole \$1.27/lb.
Cut \$3.19/lb.	Cut \$3.92/lb.	Cut \$4.04/lb.
Whole vs. Cut Price Gap -87%	Whole vs. Cut Price Gap -80%	Whole vs. Cut Price Gap -69%

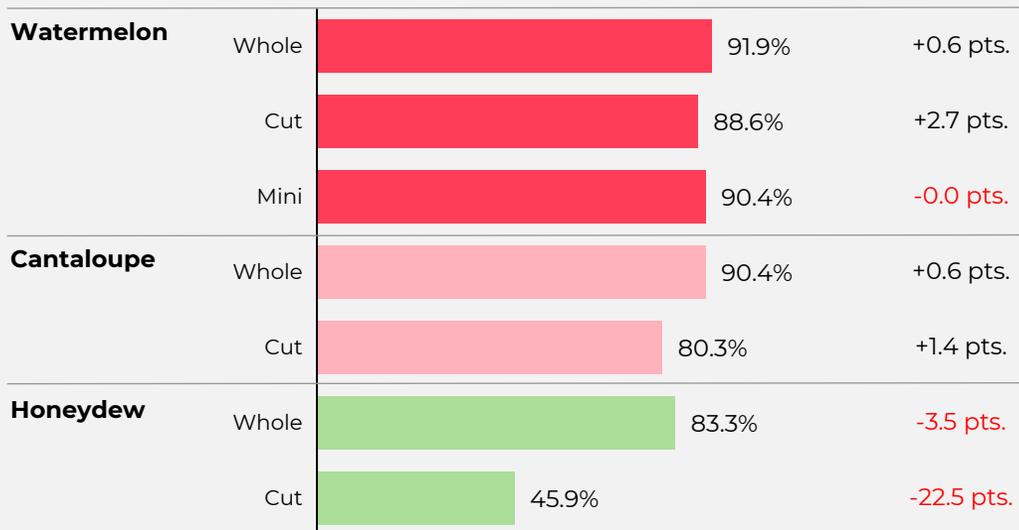


Whole watermelon outpaced other melon varieties in distribution and sales velocity over the last 52 weeks

Melon ACV Weighted Distribution* by Form

with Point Change vs. Prior Year — Total U.S.

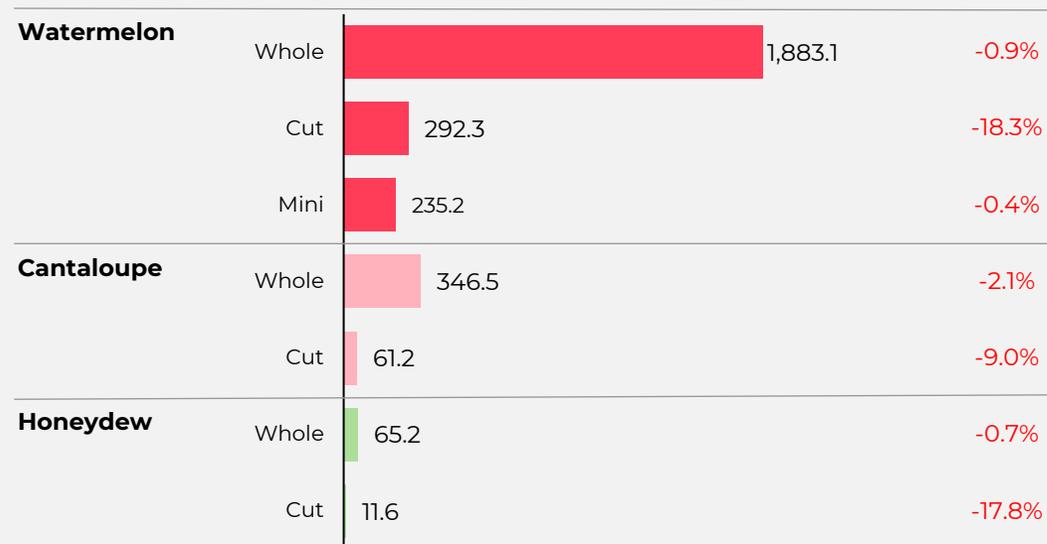
Pt. Change vs. PY



Melon Volume Sales Velocity (lbs./\$MM ACV)* by Form

with % Change vs. Prior Year — Total U.S.

Pt. Change vs. PY



Melon Dollar Sales Velocity (\$MM ACV)* vs. Prior Year			
	Watermelon	Cantaloupe	Honeydew
Whole	\$801.7	\$264.8	\$82.6
Cut	\$937.3	\$243.2	\$48.1
Mini	\$185.8	n/a	n/a

Melon Sales Velocity (\$MM ACV)* % Change vs. Prior Year			
	Watermelon	Cantaloupe	Honeydew
Whole	-4.3%	-2.7%	-0.3%
Cut	+5.5%	+4.3%	-0.1%
Mini	-3.8%	n/a	n/a

* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$MM ACV)

Source: Circana, 2025 vs. prior year

A background image showing several slices of watermelon on a rustic wooden surface. The watermelon has a bright red interior and a green rind. The lighting is soft, highlighting the texture of the fruit and the wood.

3

WATERMELON SEASONAL OVERVIEW



The spring/summer season drove category growth during the last four years, however, the fall/winter season also posted gains

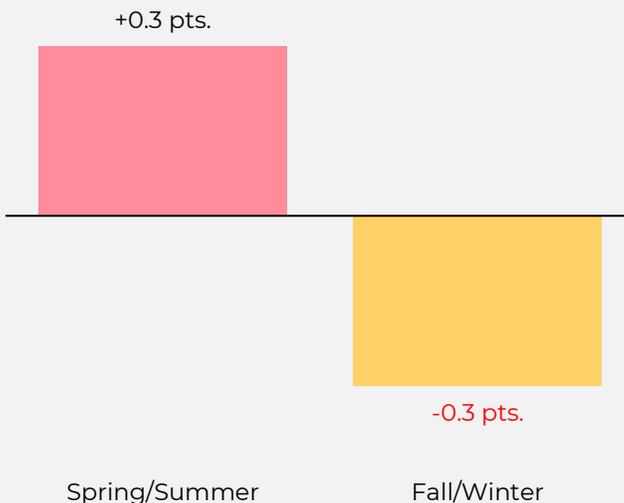
Watermelon Volume (lbs.) Sales Share

Total U.S. vs. 2021



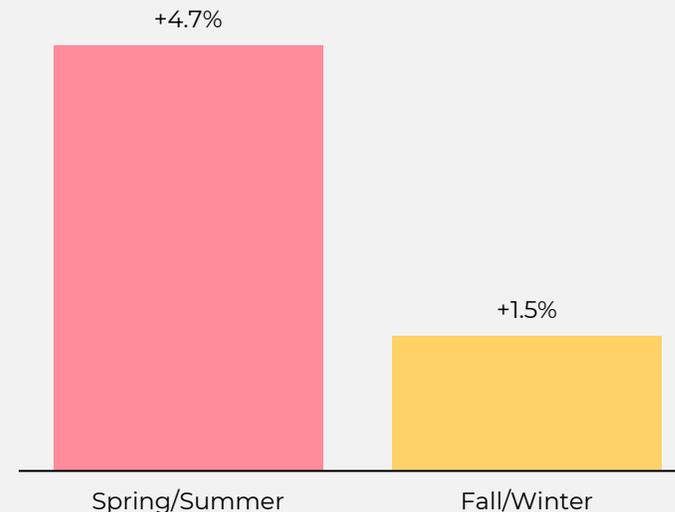
Watermelon lbs. Share Pt. Chg. vs. 2021

Total U.S.



Watermelon lbs. Growth Rate vs. 2021

Total U.S.



Watermelon Dollar Sales Trends – Total U.S.

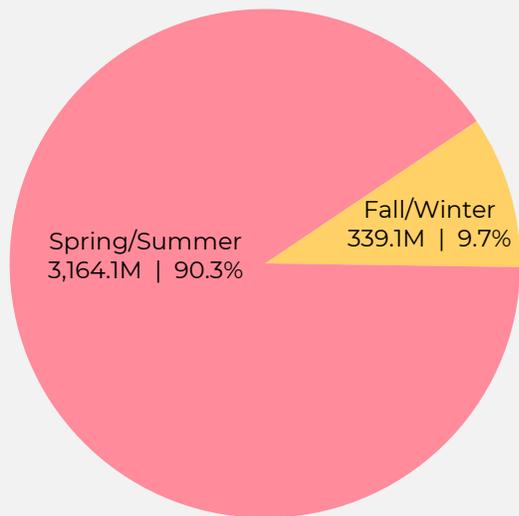
	Spring/Summer	Fall/Winter
Dollar Sales	\$2,165.3M	\$553.4M
Dollar Share	79.6%	20.4%
Share Change vs. 2021	-2.0 pts.	+2.0 pts.
Growth Rate vs. 2021	+23.9%	+40.5%



Volume was relatively flat year-over-year during spring/summer, while fall/winter saw a decline in volume

Watermelon Volume (lbs.) Sales Share

Total U.S. by Season

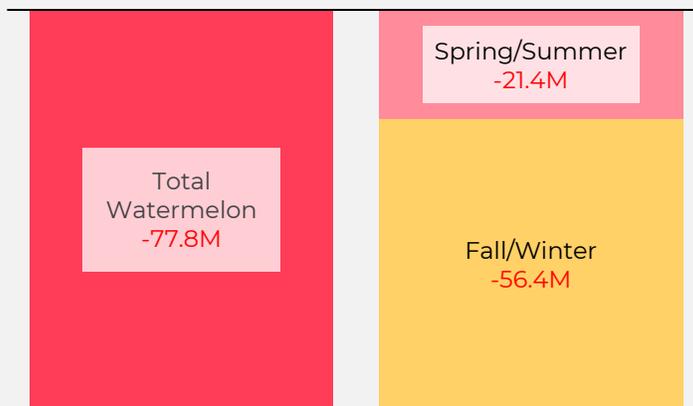


Watermelon Incremental lbs. vs. Prior Year

Total U.S. by Season

Total Watermelon

Incremental by Season

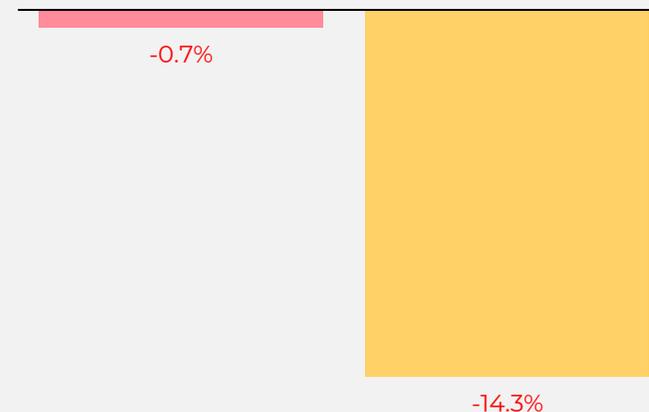


Watermelon lbs. Growth Rate vs. Prior Year

Total U.S. by Season

Spring/Summer

Fall/Winter

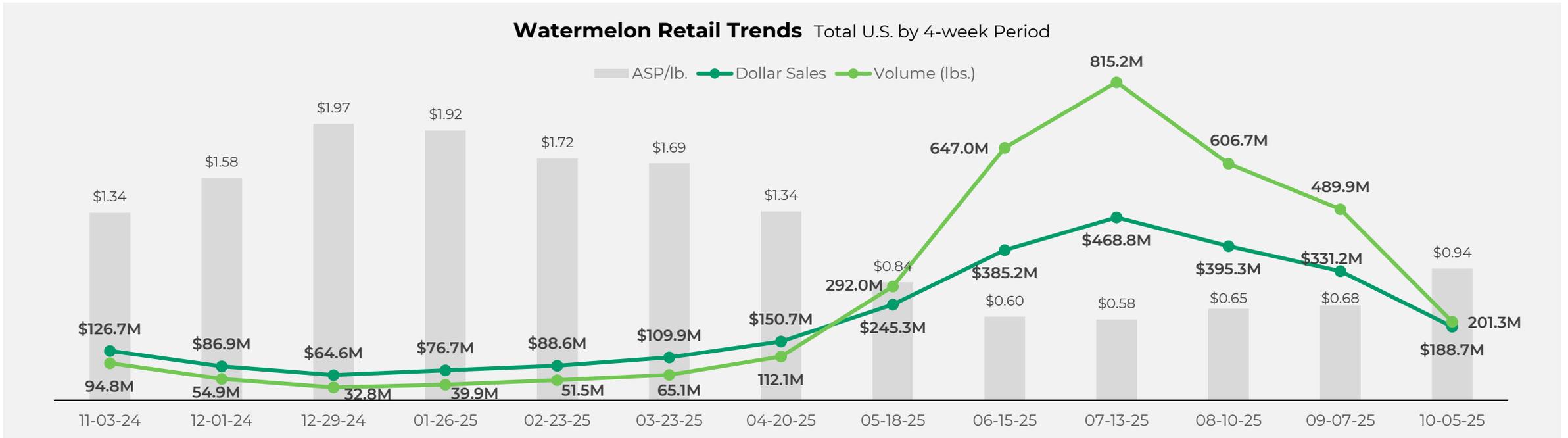


Watermelon Dollar Sales Trends – Total U.S.

Watermelon Season	Spring/Summer	Fall/Winter
Dollar Sales	\$2,165.3M	\$553.4M
Dollar Share	79.6%	20.4%
Incremental Dollars	+\$72.9M	-\$18.0M
Dollar Growth Rate	+3.5%	-3.1%



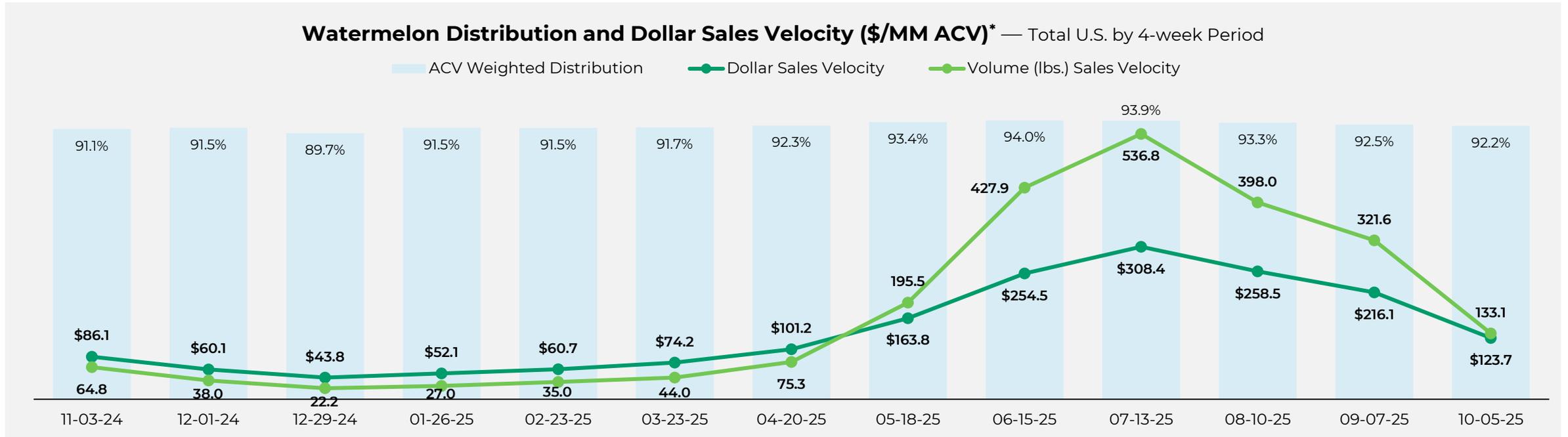
Watermelon retail volume surged in May 2025, and peaked in June/July



Watermelon Retail Trends Percent Change vs. Prior Year — Total U.S. by 4-week Period													
4 Weeks Ending	11-3-24	12-1-24	12-29-24	1-26-25	2-23-25	3-23-25	4-20-25	5-8-25	6-15-25	7-13-25	8-10-25	9-7-25	10-5-25
Dollars	+2.0%	-6.5%	-14.3%	-6.6%	-4.2%	+5.5%	+20.2%	+1.6%	-3.3%	+1.3%	+6.2%	+6.1%	+4.8%
Volume (lbs.)	-4.6%	-17.8%	-32.1%	-24.3%	-15.0%	-3.8%	+28.0%	-2.0%	-4.0%	-2.3%	+0.6%	-1.8%	+6.0%
ASP/lb.	+6.8%	+13.7%	+26.1%	+23.3%	+12.7%	+9.7%	-6.1%	+3.7%	+0.7%	+3.7%	+5.6%	+8.0%	-1.2%



Watermelon distribution peaked in June, while sales velocity hit its highest point in July



Watermelon ACV Trends Change vs. Prior Year — Total U.S. by 4-week Period

4 Weeks Ending	11-3-24	12-1-24	12-29-24	1-26-25	2-23-25	3-23-25	4-20-25	5-18-25	6-15-25	7-13-25	8-10-25	9-7-25	10-5-25
ACV Weighted Distribution	+0.9 pts.	+0.8 pts.	-0.4 pts.	+1.2 pts.	+1.2 pts.	+1.3 pts.	+4.1 pts.	+1.9 pts.	+1.9 pts.	+1.7 pts.	+1.6 pts.	+1.2 pts.	+0.8 pts.
Dollar Sales Velocity	-1.1%	-8.7%	-16.6%	-9.7%	-6.8%	+2.5%	+16.5%	-0.8%	-5.9%	-1.7%	+3.0%	+2.7%	+1.4%
Volume (lbs.) Sales Velocity	-7.4%	-19.0%	-33.1%	-25.9%	-17.4%	-6.1%	+24.4%	-3.7%	-6.1%	-4.7%	-1.9%	-4.1%	+3.5%

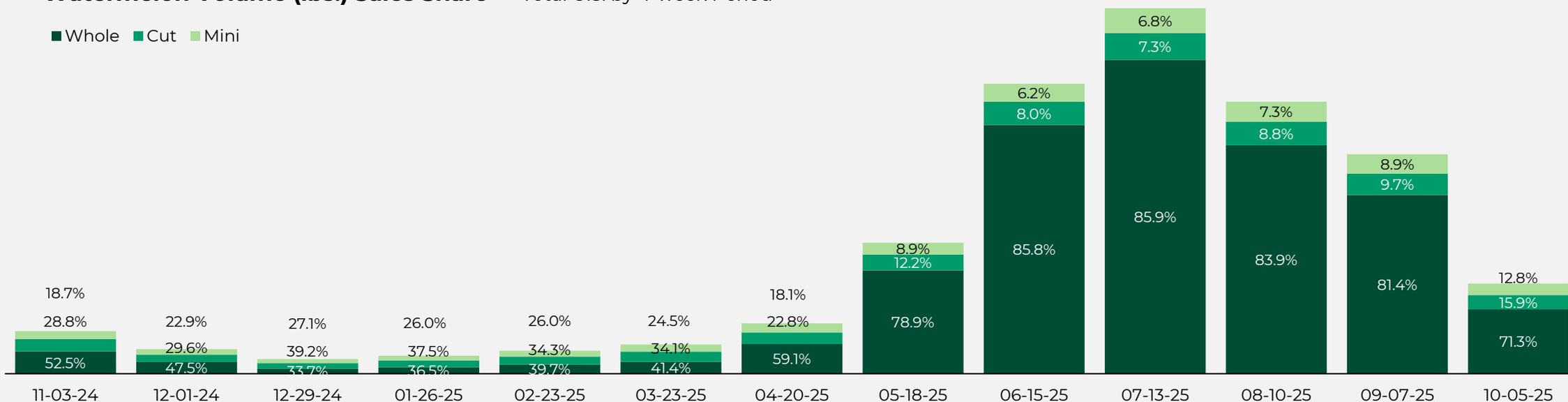
* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$/MM ACV)
Source: Circana, Spring/Summer Season, 28 weeks ending 10-5-2025 and Fall/Winter Season, 24 weeks ending 3-3-2025 vs. prior year



Whole watermelon drove retail volume and dollar sales from May through September

Watermelon Volume (lbs.) Sales Share — Total U.S. by 4-week Period

■ Whole ■ Cut ■ Mini



Watermelon Dollar Sales Share — Total U.S. by 4-week Period

4 Weeks Ending	11-3-24	12-1-24	12-29-24	1-26-25	2-23-25	3-23-25	4-20-25	5-18-25	6-15-25	7-13-25	8-10-25	9-7-25	10-5-25
Whole	24.4%	22.0%	15.9%	16.9%	18.6%	18.9%	29.0%	45.6%	53.6%	53.8%	49.5%	46.0%	33.5%
Cut	63.6%	65.4%	70.3%	69.0%	66.4%	66.7%	57.6%	45.0%	38.3%	38.1%	42.4%	45.7%	56.3%
Mini	12.0%	12.6%	13.8%	14.0%	14.9%	14.4%	13.3%	9.4%	8.0%	8.1%	8.1%	8.3%	10.2%

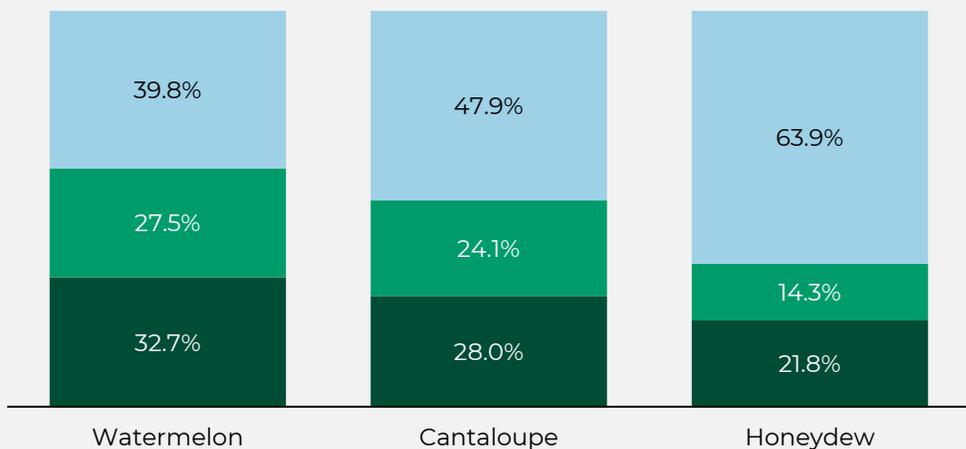


During the spring/summer season, watermelon was promoted more heavily than other melon varieties

Melon Promoted Volume (lbs.) Share

Total U.S. During Spring/Summer Season

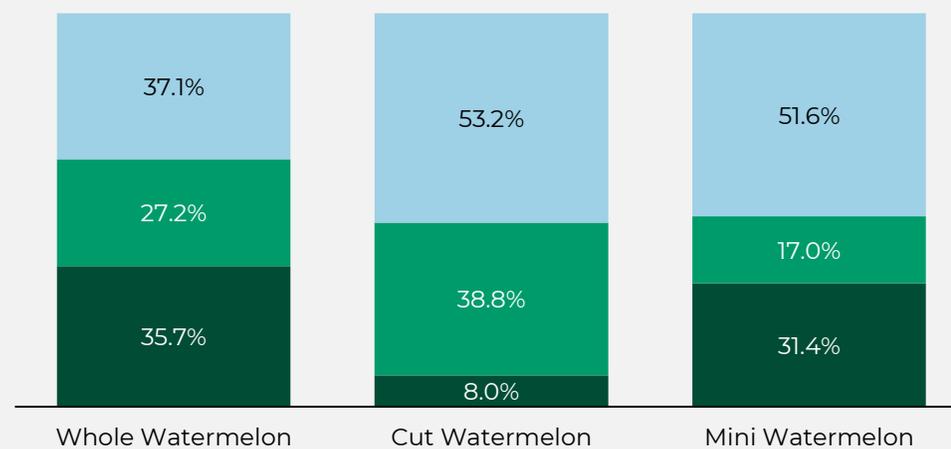
■ With Price Reduction ■ On Feature/ Display/Other ■ Non-Promoted



Watermelon Promoted Volume (lbs.) Share

Total U.S. During Spring/Summer Season

■ With Price Reduction ■ On Feature/Display/Other ■ Non-Promoted



Melon Promoted Dollar Share
Total U.S. During Spring/Summer Season

	Watermelon	Cantaloupe	Honeydew
With Price Reduction	21.0%	19.2%	17.0%
On Feature/ Display/Other	29.9%	22.7%	15.3%
Non-Promoted	49.1%	58.1%	67.7%

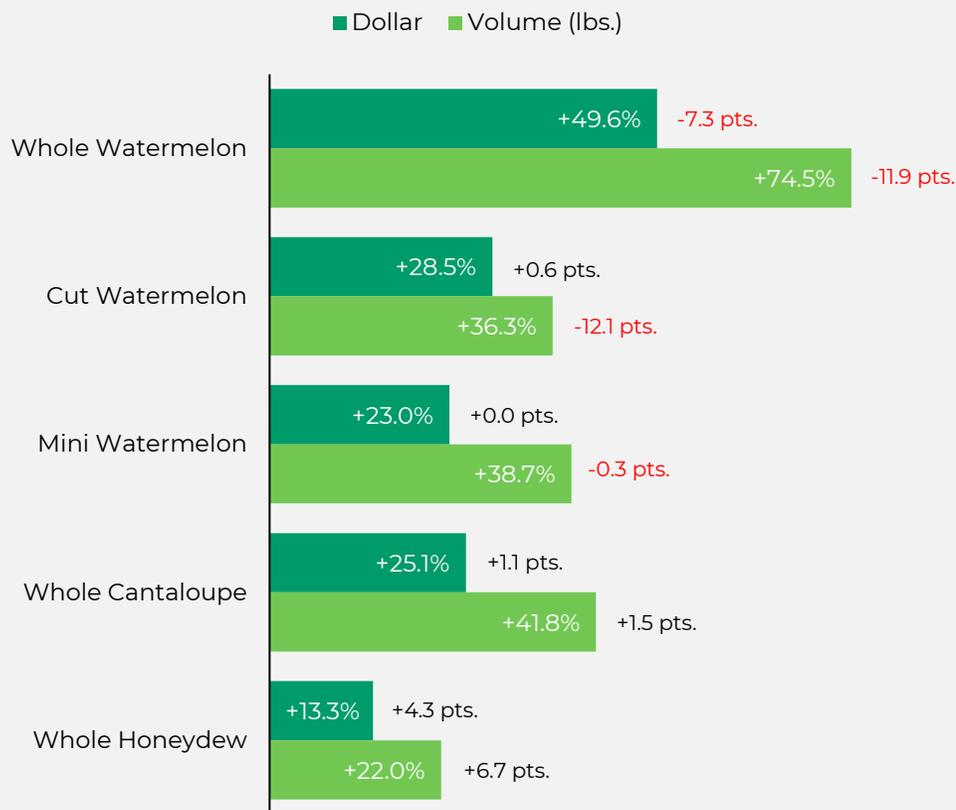
Watermelon Promoted Dollar Share
Total U.S. During Spring/Summer Season

	Whole	Cut	Mini
With Price Reduction	33.0%	6.8%	27.1%
On Feature/ Display/Other	25.0%	38.3%	14.5%
Non-Promoted	42.0%	54.9%	58.4%

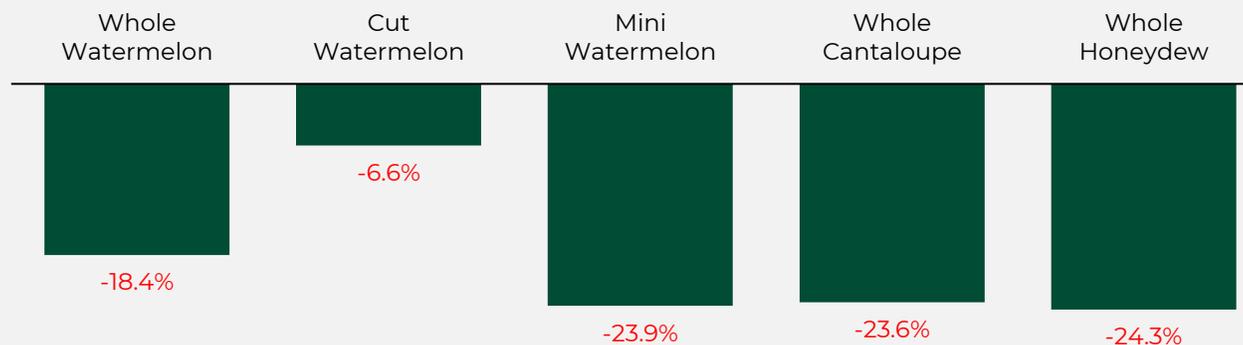


During the spring/summer season, whole watermelon saw a larger volume and dollar lift on a smaller discount than other melon varieties

Melon Promoted Sales Lift
With Point Change vs. Prior Year
Total U.S. During Spring/Summer Season



Melon Average Promoted Discount by Melon Variety
Total U.S. During Spring/Summer Season



Melon Average Promoted Discount with Point Change vs. Prior Year
Total U.S. During Spring/Summer Season

Melon Variety	Average Promoted Discount (%)	Point Change (pts.)
Whole Watermelon	-23.1%	+4.7 pts.
Cut Watermelon	-30.8%	+24.2 pts.
Mini Watermelon	-23.9%	+0.0 pts.
Whole Cantaloupe	-23.9%	+0.4 pts.
Whole Honeydew	-19.8%	-4.5 pts.

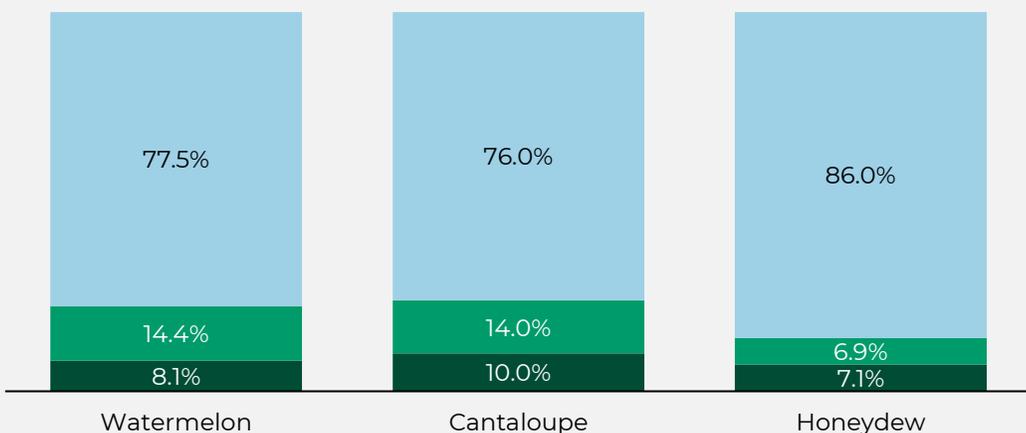


Watermelon receives less promotional support during fall/winter, with activity shifting toward cut watermelon

Melon Promoted Volume (lbs.) Share

Total U.S. During Fall/Winter Season

■ With Price Reduction ■ On Feature/ Display/Other ■ Non-Promoted



Watermelon Promoted Volume (lbs.) Share

Total U.S. During Fall/Winter Season

■ With Price Reduction ■ On Feature/Display/Other ■ Non-Promoted



Melon Promoted Dollar Share
Total U.S. During Fall/Winter Season

	Watermelon	Cantaloupe	Honeydew
With Price Reduction	6.7%	9.3%	6.7%
On Feature/Display/Other	18.4%	13.6%	6.7%
Non-Promoted	74.9%	77.1%	86.6%

Watermelon Promoted Dollar Share
Total U.S. During Fall/Winter Season

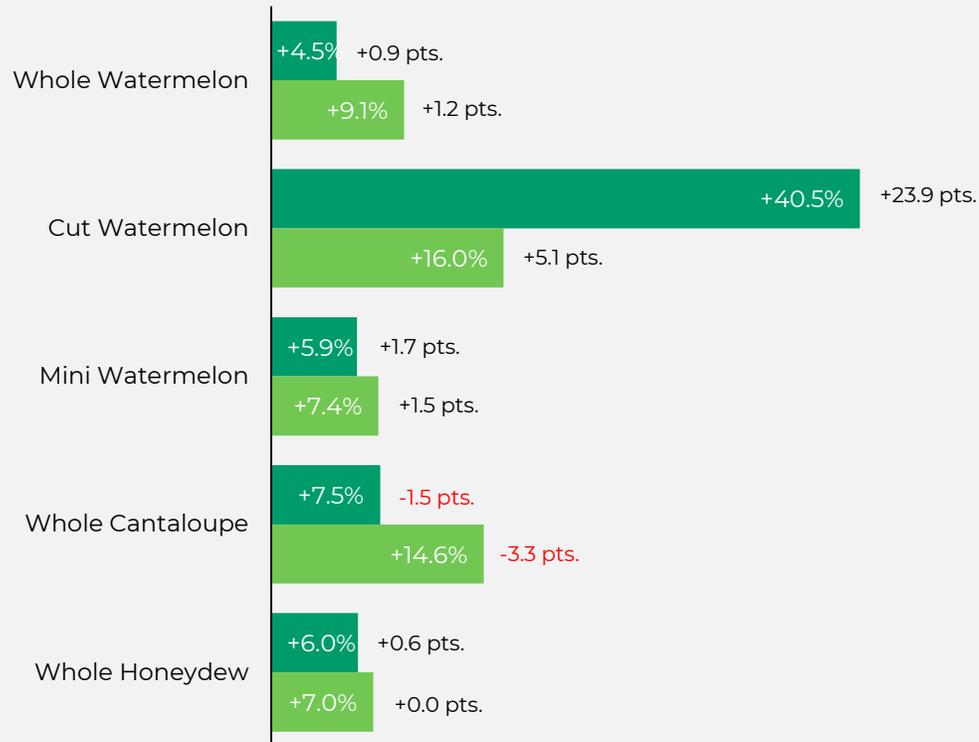
	Whole	Cut	Mini
With Price Reduction	6.4%	6.2%	9.6%
On Feature/ Display/Other	10.1%	23.6%	5.3%
Non-Promoted	83.5%	70.2%	85.1%



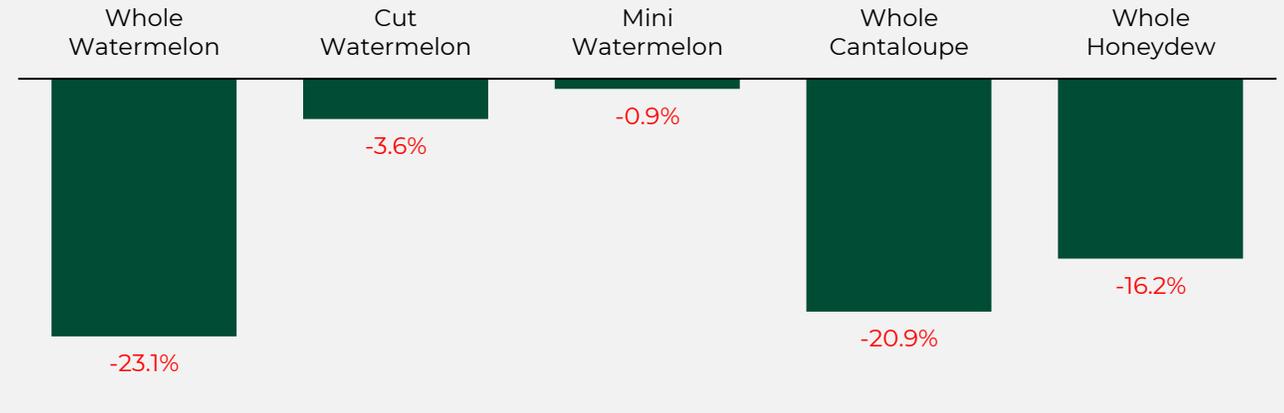
During the fall/winter season, cut watermelon saw a larger dollar lift than whole watermelon on a much smaller discount

Melon Promoted Sales Lift
With Point Change vs. Prior Year
Total U.S. During Fall/Winter Season

■ Dollar ■ Volume (lbs.)



Melon Average Promoted Discount
Total U.S. During Fall/Winter Season



Melon Average Promoted Discount with Point Change vs. Prior Year
Total U.S. During Fall/Winter Season

Melon Type	Discount (%)	Point Change (pts.)
Whole Watermelon	-31.6%	+8.5 pts.
Cut Watermelon	-28.8%	+25.1 pts.
Mini Watermelon	-7.4%	+6.5 pts.
Whole Cantaloupe	-18.9%	-2.0 pts.
Whole Honeydew	-17.1%	+0.9 pts.

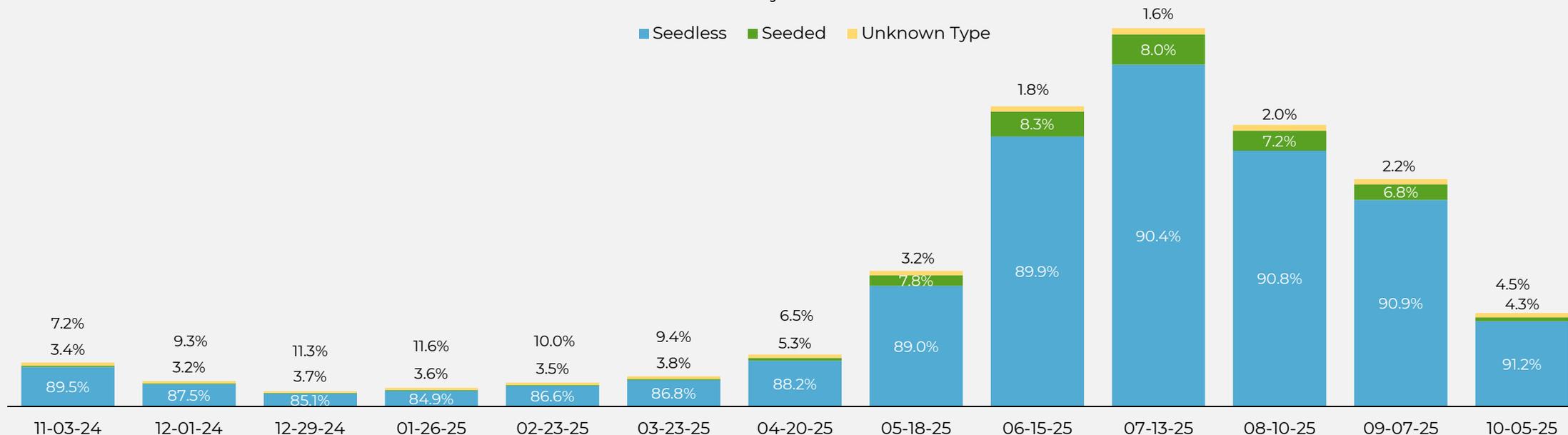


Seedless watermelon drove volume all year, but seeded watermelon became more prominent during the spring/summer season

Watermelon Volume (lbs.) Sales Share

Total U.S. by 4-week Period

Seedless Seeded Unknown Type

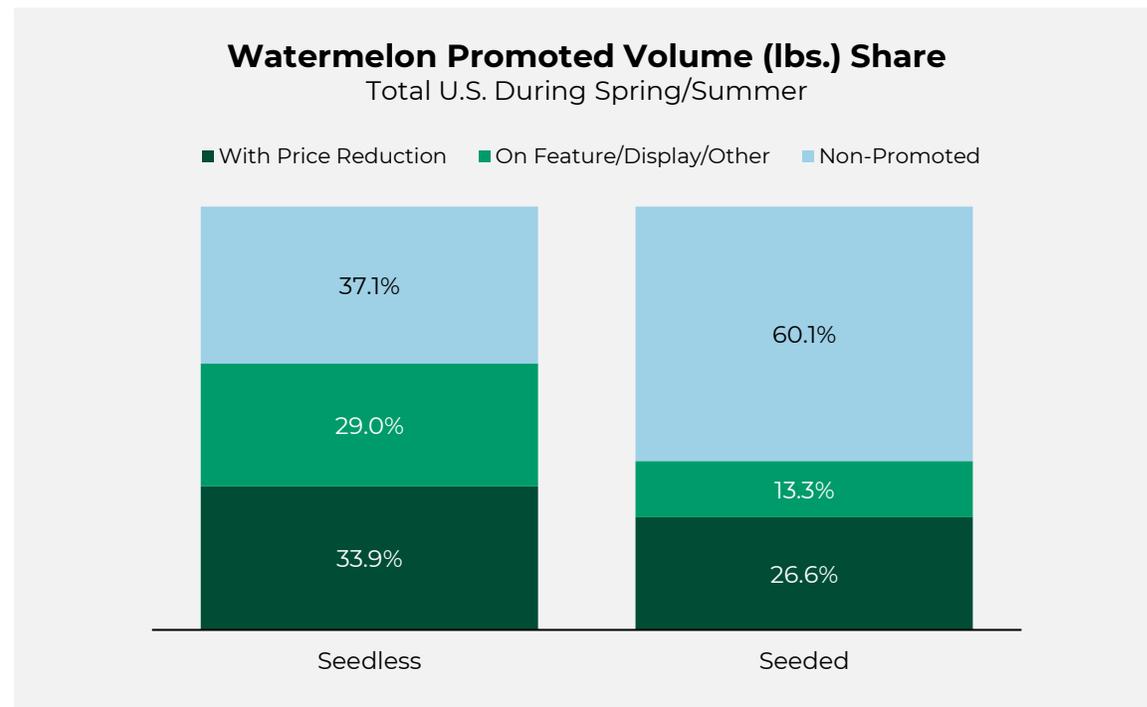
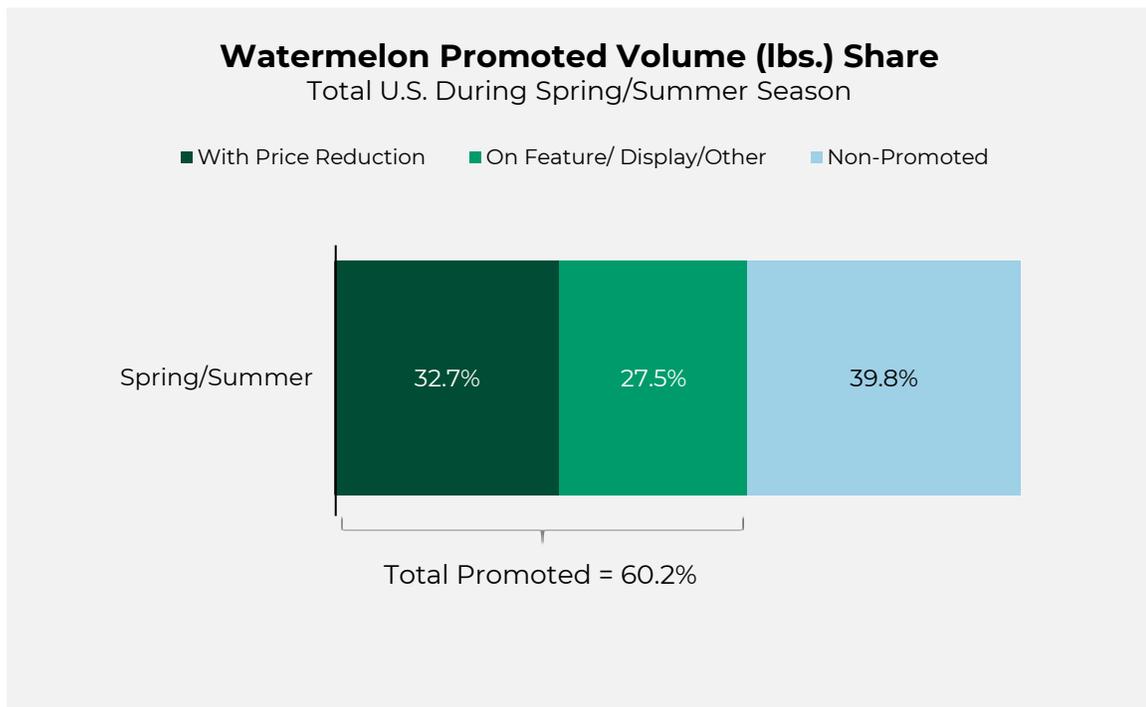


Watermelon Dollar Sales Share — Total U.S. by 4-week Period

4 Weeks Ending	11-3-24	12-1-24	12-29-24	1-26-25	2-23-25	3-23-25	4-20-25	5-18-25	6-15-25	7-13-25	8-10-25	9-7-25	10-5-25
Seedless	74.8%	73.3%	73.1%	71.7%	72.9%	73.4%	76.4%	79.5%	81.2%	81.6%	81.6%	80.7%	76.6%
Seeded	2.6%	2.4%	2.4%	2.6%	2.5%	2.9%	3.5%	5.6%	6.9%	6.8%	5.7%	5.4%	3.4%
Unknown Type	22.6%	24.3%	24.5%	25.7%	24.6%	23.7%	20.1%	14.9%	11.9%	11.6%	12.7%	13.9%	20.0%



During spring/summer, seedless watermelon was more heavily promoted than seeded. Additionally, seedless promotions were typically limited to price discounts without additional support



Watermelon Promoted Dollar Share Total U.S. During Spring/Summer Season			
	With Price Reduction	On Feature/ Display/Other	Non-Promoted
Seedless	23.6%	34.1%	42.3%
Seeded	21.8%	14.1%	64.1%

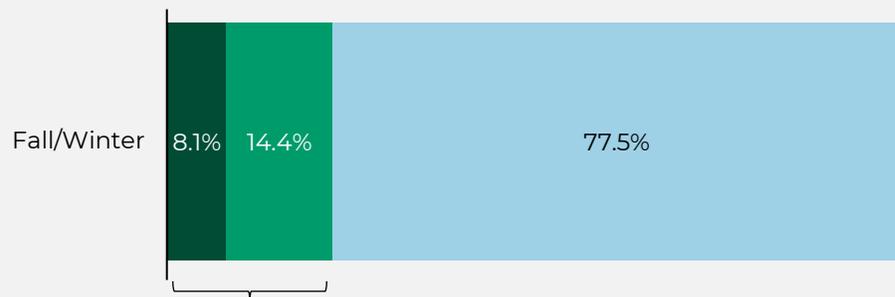


Compared to spring/summer, promotional activity was lower for seedless and seeded watermelon

Watermelon Promoted Volume (lbs.) Share

Total U.S. During Fall/Winter Season

■ With Price Reduction ■ On Feature/ Display/Other ■ Non-Promoted

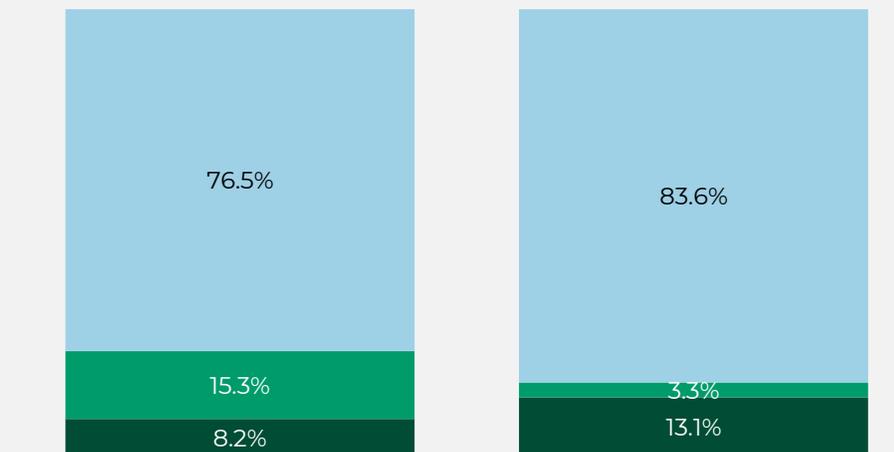


Total Promoted = 22.5%

Watermelon Promoted Volume (lbs.) Share

Total U.S. During Fall/Winter Season

■ With Price Reduction ■ On Feature/Display/Other ■ Non-Promoted



Seedless

Seeded

Watermelon Promoted Dollar Share Total U.S. During Fall/Winter Season

	With Price Reduction	On Feature/Display/Other	Non-Promoted
Seedless	7.3%	21.3%	71.4%
Seeded	11.7%	5.8%	82.5%



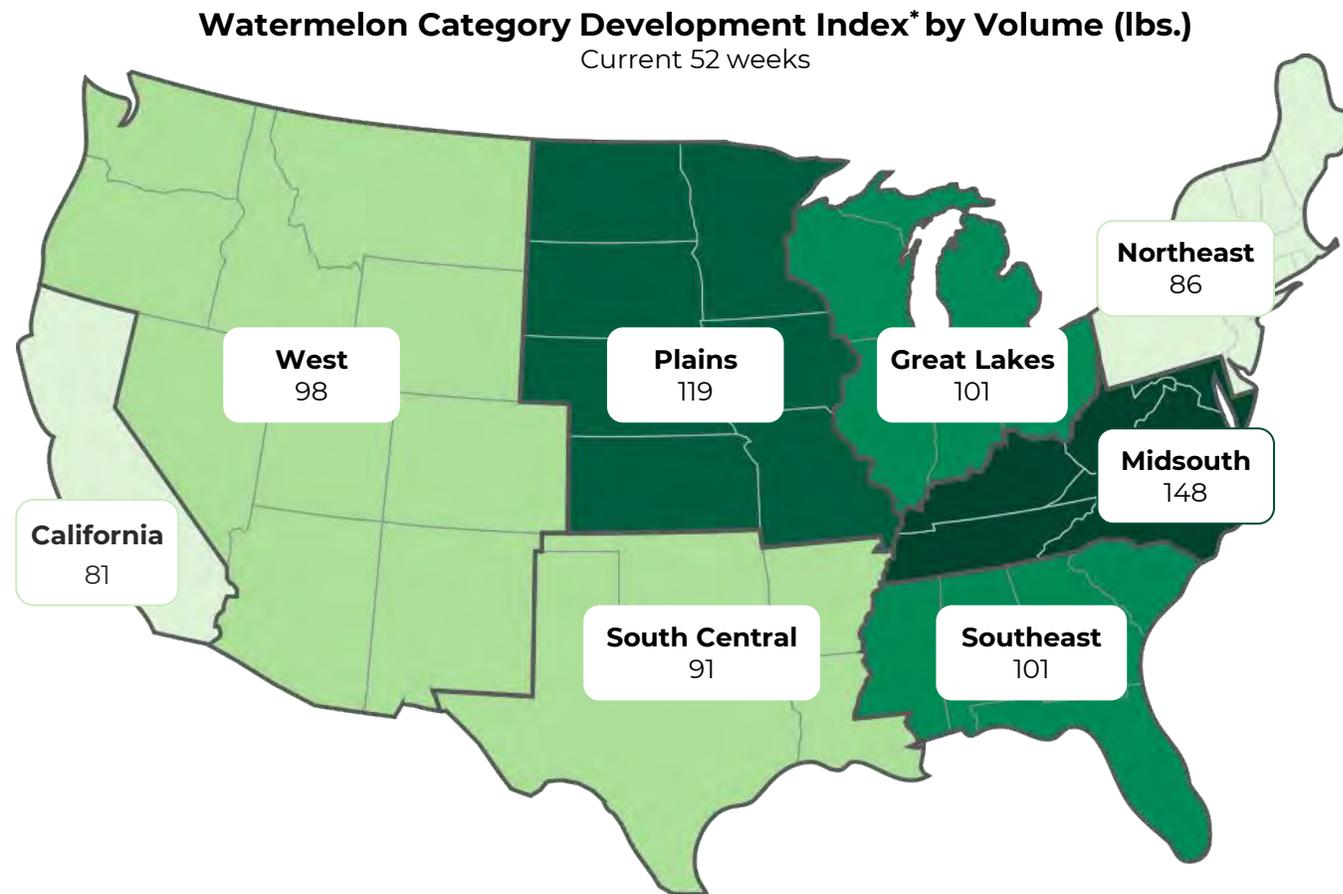
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WATERMELON REGIONAL OVERVIEW



The Plains region saw the largest increase in watermelon category development over the 52-week period

Watermelon Category Development Index by Volume (lbs.)		
Region	Current 52-weeks	Point Change vs. PY
California	81	-3.3 pts
West	98	+1.2 pts.
Plains	119	+7.4 pts.
South Central	91	-4.2 pts.
Great Lakes	101	+1.8 pts.
Northeast	86	-1.1 pts.
Midsouth	148	+1.9 pts.
Southeast	101	+0.5 pts.

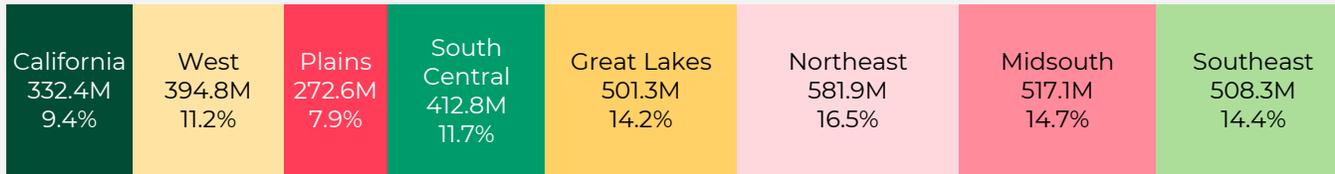


110+ = high index; under 90 = low index
* See slide 6 for more information on Category Development Index
Source: Circana, 2025 vs. prior year

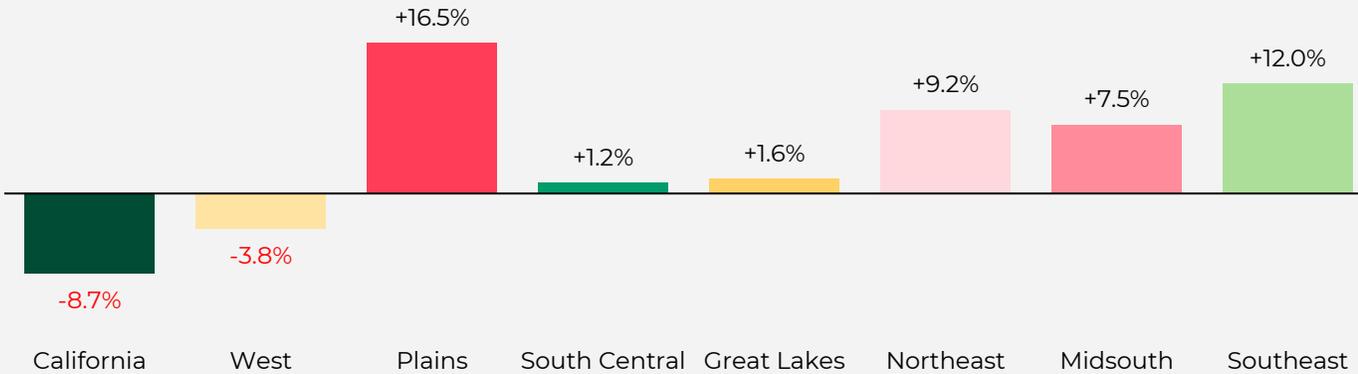


The Plains led the regions in volume (lbs.) growth rate (+17%), while the Southeast led in dollar growth (+43%)

Watermelon Regional Volume (lbs.) Sales Share



Watermelon Regional Volume (lbs.) Growth Rate vs. 2021



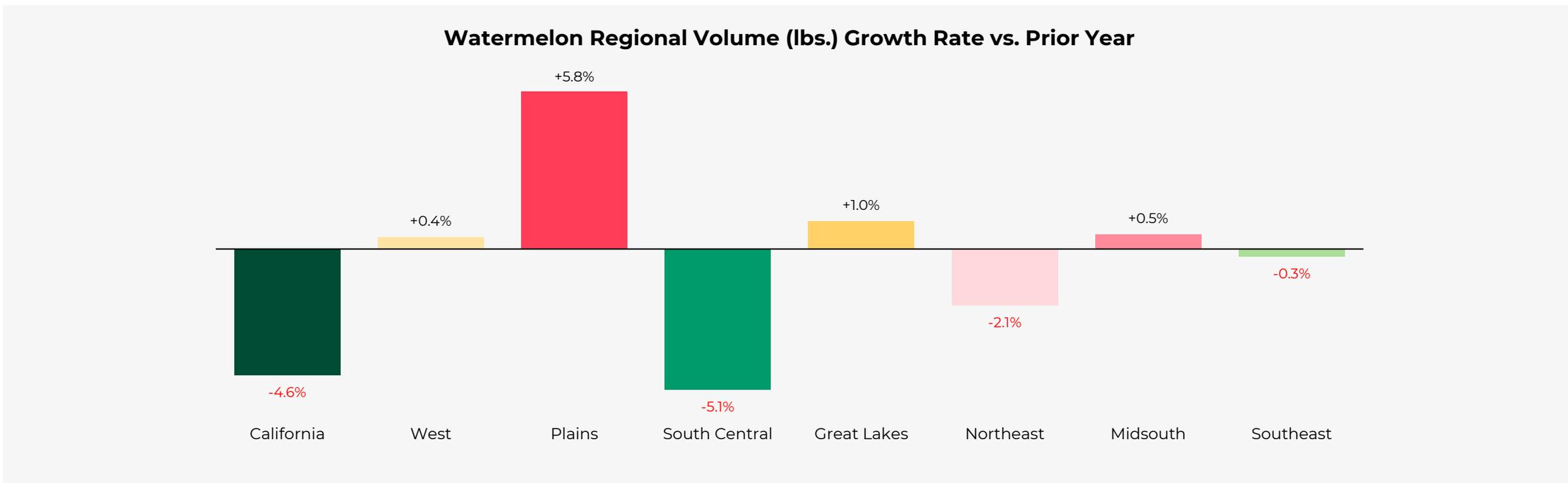
Watermelon Regional Retail Sales vs. 2021		
Region	Dollar Sales and Share	Dollar Growth Rate vs. 2021
California	\$289.4M 10.6%	+24.6%
West	\$296.8M 10.8%	+15.9%
Plains	\$166.6M 6.0%	+29.1%
South Central	\$326.2M 11.9%	+28.4%
Great Lakes	\$335.8M 12.3%	+21.0%
Northeast	\$426.4M 15.6%	+8.4%
Midsouth	\$369.3M 13.5%	+35.6%
Southeast	\$527.7M 19.3%	+38.9%

2025 Watermelon CDI by Region

California	81	West	98	Plains	119	South Central	91	Great Lakes	101	Northeast	86	Midsouth	148	Southeast	101
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The Plains region posted the largest sales gains during the 52 weeks



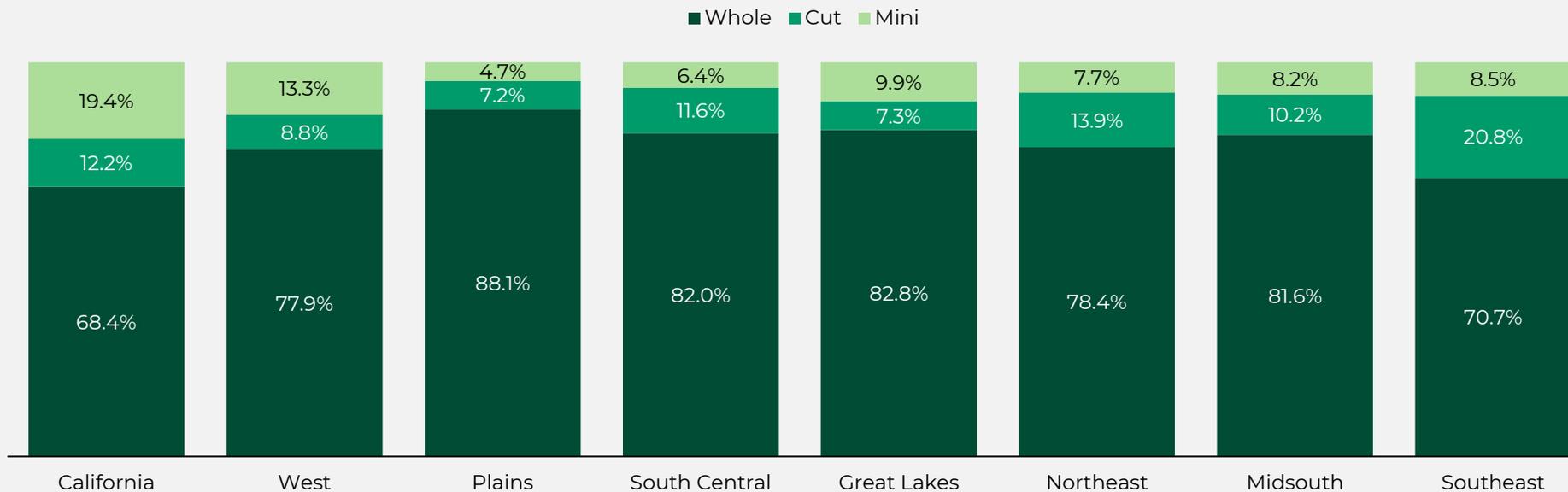
Watermelon Regional Dollar Growth Rate vs. Prior Year

Region	Growth Rate (%)
California	-0.5%
West	+5.2%
Plains	+11.5%
South Central	+1.6%
Great Lakes	+1.9%
Northeast	-0.2%
Midsouth	+4.6%
Southeast	+6.4%



California held the largest proportion of mini watermelon volume (lbs.) sales, while the Southeast region had the largest proportion of cut watermelon during the 52-week period

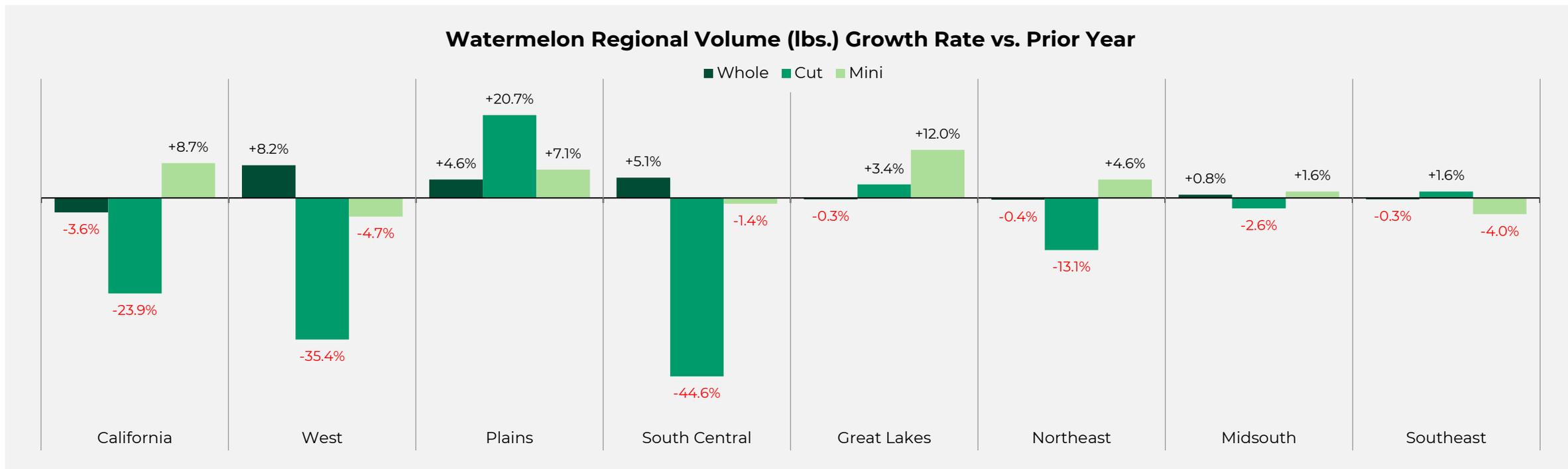
Watermelon Regional Volume (lbs.) Sales Share



Watermelon Regional Dollar Sales Share								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Whole	38.1%	43.8%	55.5%	42.2%	49.9%	43.4%	44.8%	28.4%
Cut	42.7%	42.2%	38.1%	51.3%	40.6%	47.6%	47.0%	64.9%
Mini	19.2%	14.0%	6.4%	6.5%	9.5%	9.0%	8.2%	6.7%



The Plains region posted the largest sales gains for cut watermelon during the 52 weeks



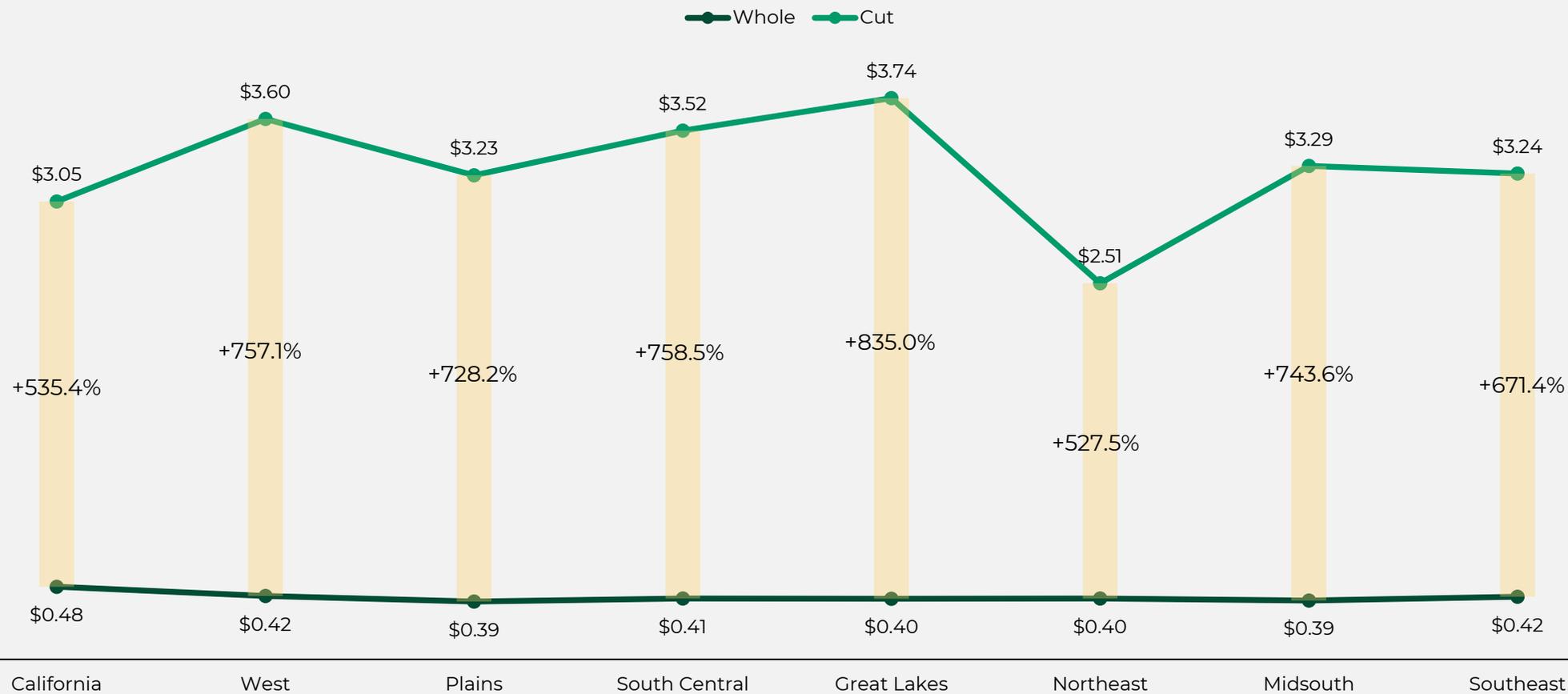
Watermelon Regional Dollar Growth Rate vs. Prior Year

	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Whole	-5.1%	+2.8%	+0.9%	-1.0%	-6.3%	-2.4%	+0.4%	-5.1%
Cut	+4.2%	+10.4%	+34.0%	+4.0%	+12.3%	+2.3%	+10.0%	+14.1%
Mini	-1.0%	-1.7%	+3.1%	+0.3%	+8.1%	-2.2%	-1.0%	-6.8%



The Great Lakes region had the largest pricing gap between whole and cut watermelon over the 52 weeks

Watermelon Regional ASP/lb. — Pricing Gap Cut vs. Whole



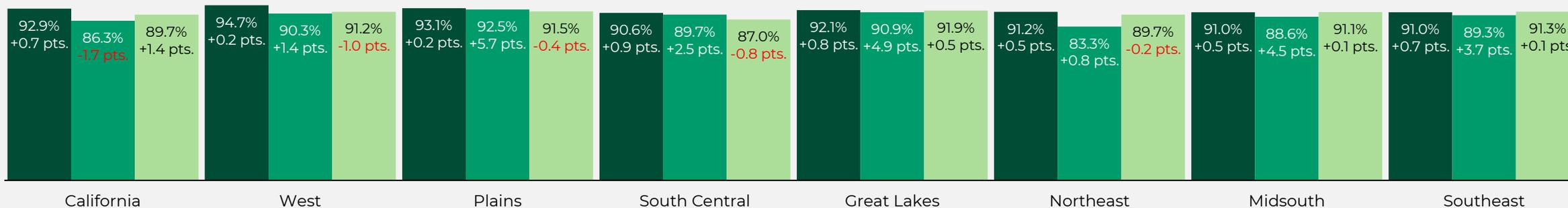


Over the last 52 weeks, distribution for whole watermelon was above 90% across all regions. However, cut watermelon showed a range of 93% in Plains to 83% in the Northeast

Watermelon Regional ACV Weighted Distribution*

with Point Change vs. Prior Year

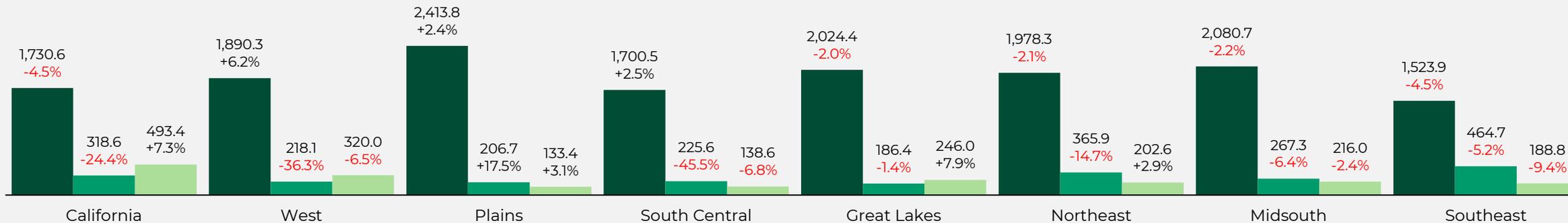
■ Whole ■ Cut ■ Mini



Watermelon Regional Volume (lbs.) Sales Velocity (\$MM ACV)*

with % Change vs. Prior Year

■ Whole ■ Cut ■ Mini



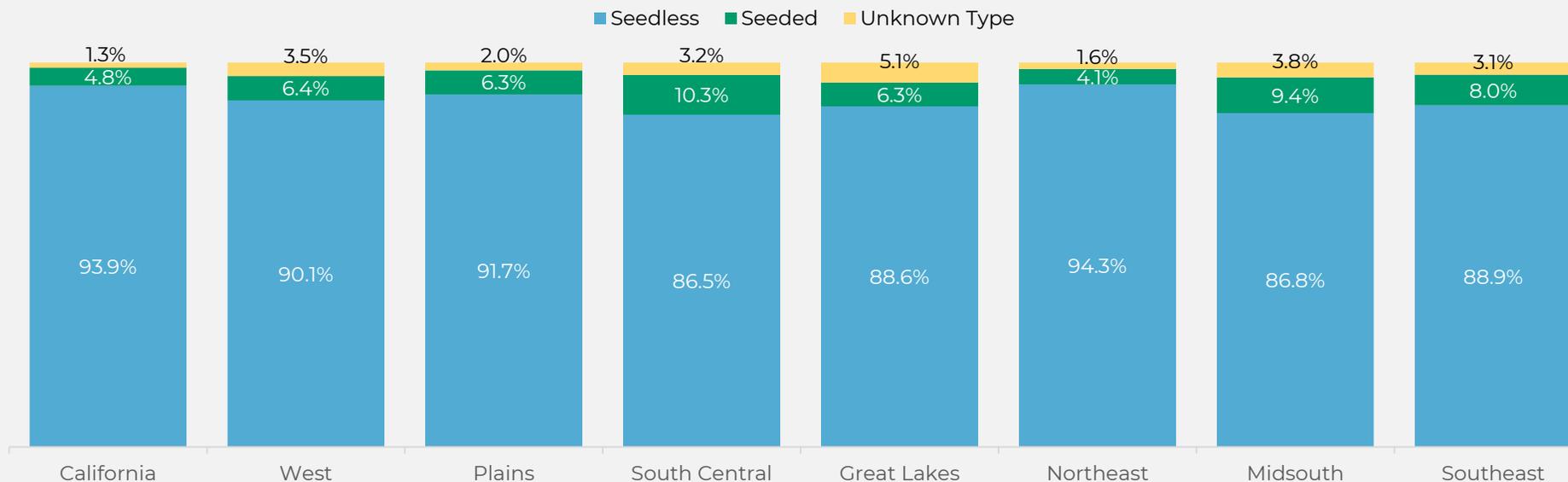
* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$MM ACV)

Source: Circana, 2025 vs. prior year



California and the Northeast had the lowest proportion of seeded watermelon and largest proportion of seedless at 94%

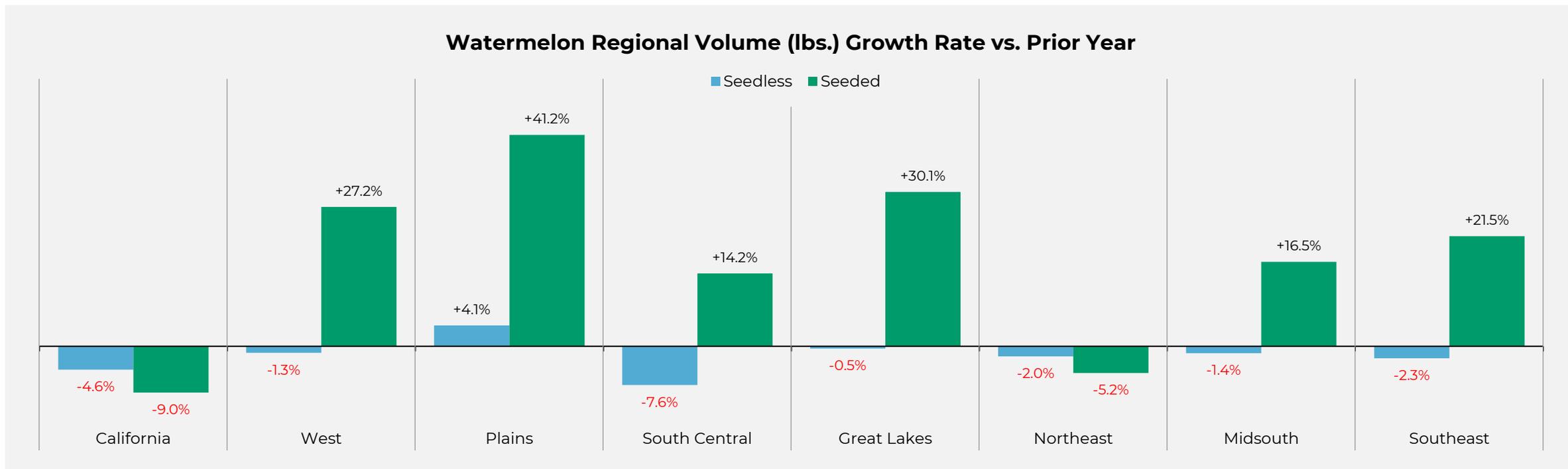
Watermelon Regional Volume (lbs.) Sales Share



Watermelon Regional Dollar Growth Rate vs. Prior Year								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Seedless	91.4%	76.8%	75.1%	76.4%	63.1%	85.6%	72.3%	84.4%
Seeded	2.8%	3.9%	10.3%	7.7%	4.9%	4.8%	6.2%	3.2%
Unknown Type	5.8%	19.3%	14.6%	15.9%	32.0%	9.6%	21.5%	12.4%



Seeded watermelon volume increased across most regions. However, the Plains saw an increase in volume sales for seedless watermelon

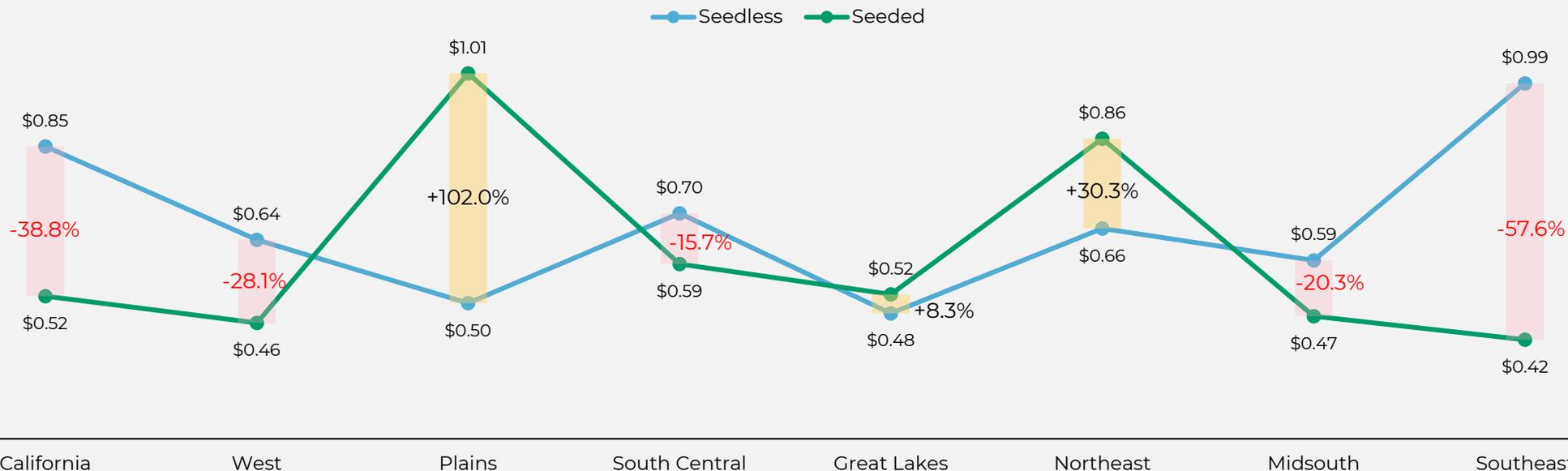


Watermelon Regional Dollar Growth Rate vs. Prior Year								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Seedless	-0.3%	+4.7%	+14.4%	-0.0%	+1.1%	+0.4%	+2.5%	+5.0%
Seeded	-9.7%	+12.3%	+13.5%	+9.4%	+20.7%	-2.3%	+13.0%	+17.4%



Pricing dynamics between seedless and seeded watermelon vary significantly across the U.S., ranging from a +102% price premium for seeded watermelon in the Plains to a negative premium in the Southeast (seeded ASP was -58% lower than seedless in the Southeast).

Watermelon ASP/lb. – Pricing Gap Seeded vs. Seedless



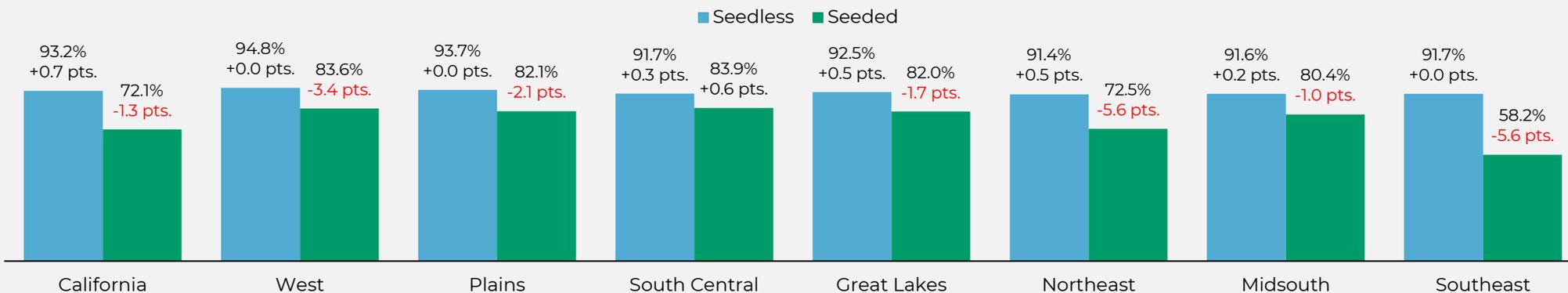
Watermelon Regional ASP/lb. Change vs. Prior Year								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Seedless	+4.5%	+6.1%	+10.0%	+8.2%	+1.5%	+2.5%	+3.9%	+7.5%
Seeded	-0.8%	-11.7%	-19.7%	-4.2%	-7.2%	+3.1%	-3.0%	-3.3%



Seedless watermelon distribution was high across all regions (above 91%), while seeded distribution ranged from 84% in South Central to 58% in Southeast

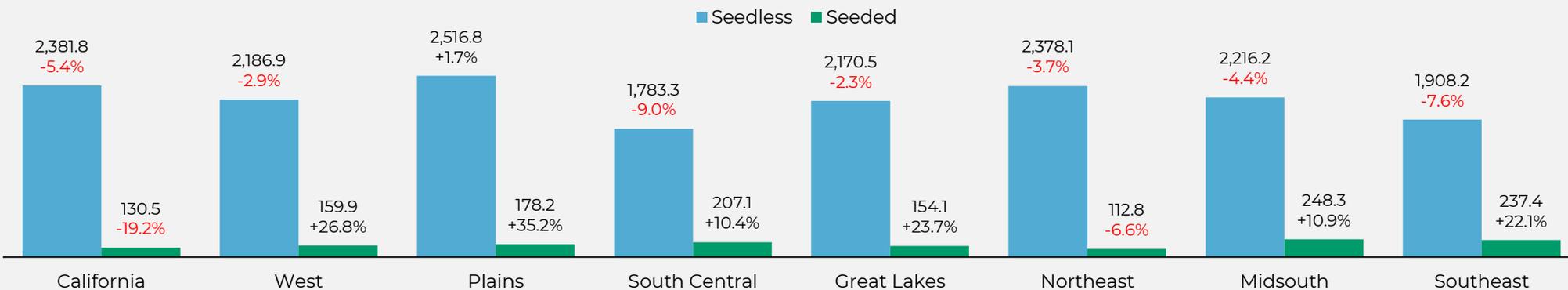
Watermelon Regional ACV Weighted Distribution* by Seed Type

with Point Change vs. Prior Year



Watermelon Regional Volume (lbs.) Sales Velocity (\$MM ACV)* by Seed Type

with % Change vs. Prior Year



* See Slide 8 for more information on ACV weighted distribution and sales velocity (\$MM ACV)

Source: Circana, 2025 vs. prior year

A close-up photograph of several triangular slices of watermelon with bright red flesh and green rinds, arranged on a light-colored wooden cutting board. The background shows the dark green, striped rind of a whole watermelon.

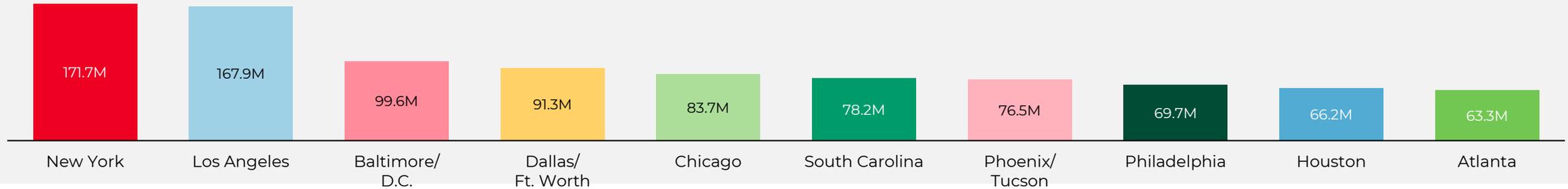
5

WATERMELON TOP 10 MARKET OVERVIEW

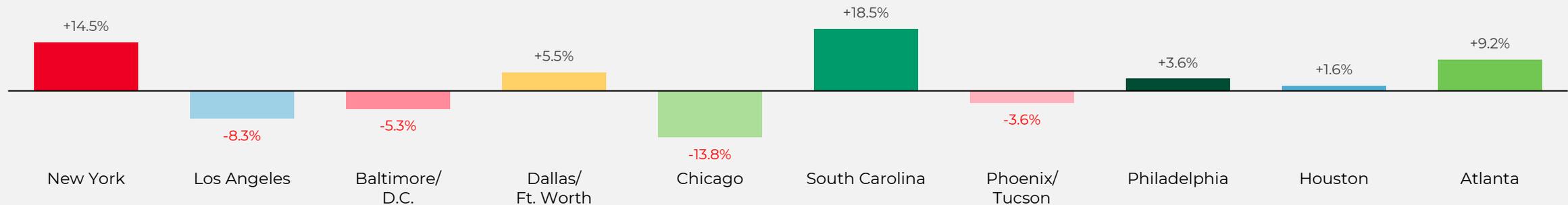


Over the past four years, the South Carolina market saw the highest volume (lbs.) and dollar sales growth rates

Top 10 Market Watermelon Volume (lbs.) Sales



Top 10 Market Watermelon Volume (lbs.) Sales % Change vs. 2021

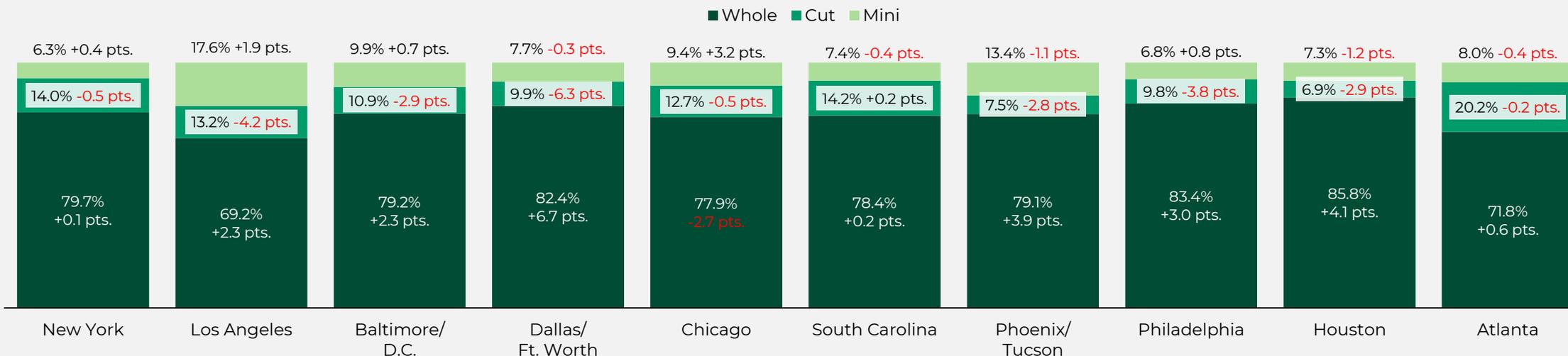


Top 10 Markets	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Dollar Sales	\$119.0M	\$150.1M	\$77.5M	\$71.6M	\$69.1M	\$63.6M	\$50.5M	\$51.7M	\$43.0M	\$67.7M
% Change vs. 2021	+9.6%	+25.5%	+7.4%	+36.8%	+9.3%	+47.4%	+34.9%	+4.7%	+29.5%	+37.5%



Atlanta had the highest proportion of cut watermelon volume (lbs.) among the top markets

Top 10 Market Share of Watermelon Volume (lbs.) Sales with Point Change vs. Prior Year



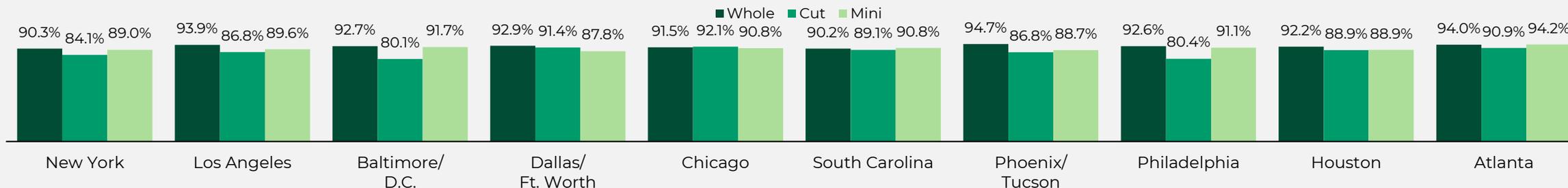
Top 10 Market Share of Watermelon Dollars with Point Change vs. PY

	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Whole	45.7% -0.6 pts.	38.2% -1.1 pts.	40.9% +0.1 pts.	45.5% -0.9 pts.	38.4% -5.9 pts.	37.4% -3.2 pts.	46.5% +0.2 pts.	46.1% -0.0 pts.	52.6% -0.2 pts.	29.4% -2.6 pts.
Cut	45.5% +0.7 pts.	44.8% +1.2 pts.	49.3% +0.1 pts.	46.5% +1.5 pts.	54.6% +4.6 pts.	55.6% +3.9 pts.	39.5% +0.3 pts.	45.8% -0.2 pts.	38.8% +0.7 pts.	64.9% +3.2 pts.
Mini	8.7% -0.1 pts.	17.0% -0.1 pts.	9.8% -0.1 pts.	8.1% -0.5 pts.	7.0% +1.2 pts.	7.0% -0.7 pts.	14.0% -0.5 pts.	8.0% +0.2 pts.	7.7% -0.5 pts.	5.7% -0.6 pts.

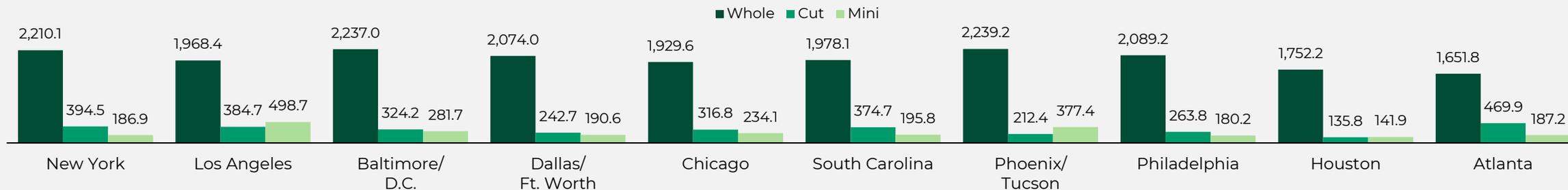


Cut watermelon velocity was higher in Miami, Tampa and Orlando, while Los Angeles saw higher velocity for Mini watermelon

Top 10 Market Watermelon ACV Weighted Distribution*



Top 10 Market Watermelon Volume (lbs.) Sales Velocity (\$MM ACV)*



Top 10 Market Dollar Sales Velocity*

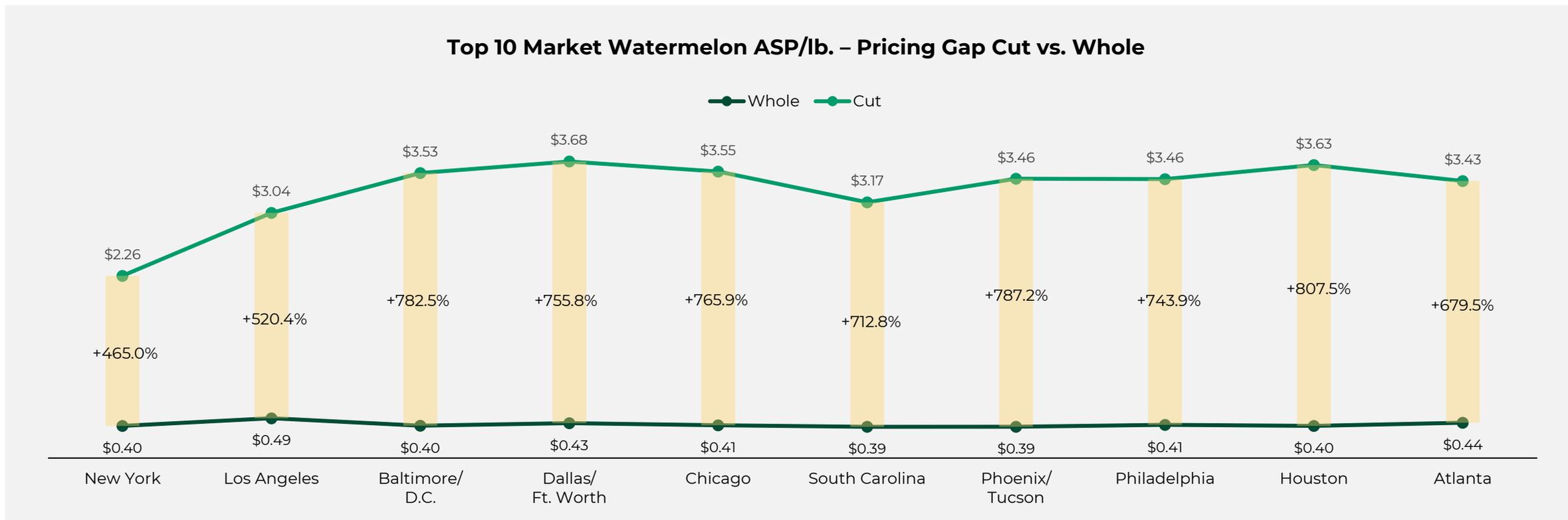
	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Whole	\$899.1	\$968.2	\$898.8	\$898.3	\$783.5	\$767.4	\$870.6	\$858.9	\$703.8	\$724.0
Cut	\$903.8	\$1,167.5	\$1,152.8	\$887.3	\$1,134.0	\$1,181.1	\$734.0	\$910.6	\$485.4	\$1,609.6
Mini	\$176.5	\$429.6	\$218.1	\$156.5	\$144.4	\$152.2	\$261.9	\$158.0	\$110.1	\$142.8

* See Slide 8 for more information on ACV weighted distribution and volume sales velocity (lbs./\$MM ACV)

Source: Circana, 2025



The price premium of cut watermelon was lowest in New York and highest in Houston



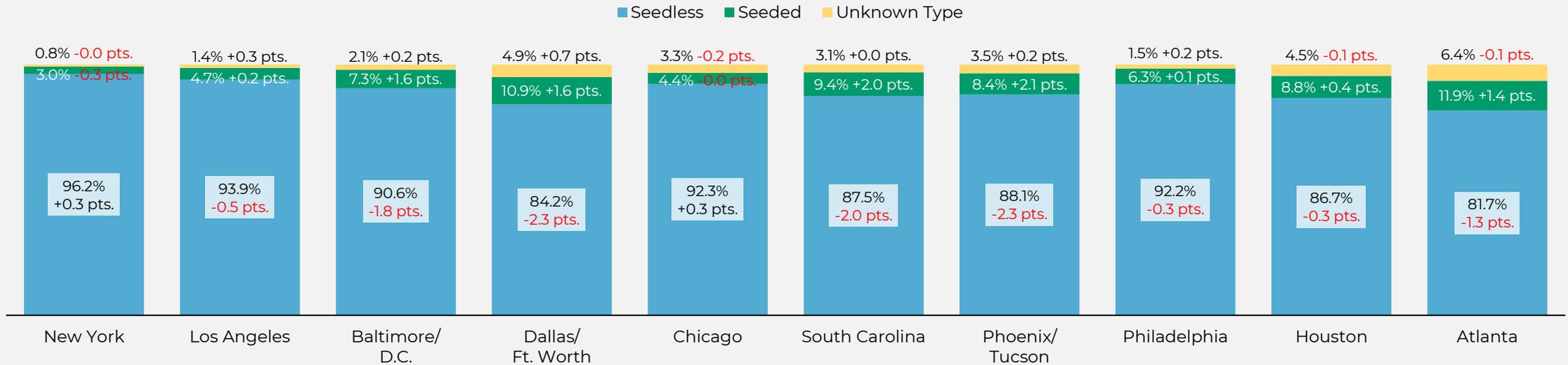
Top 10 Market Watermelon ASP/lb. % Chg. vs. PY

	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Whole	+1.4%	-1.7%	-0.6%	-4.7%	-4.6%	-4.9%	+2.0%	-0.1%	-7.2%	-6.1%
Cut	+8.3%	+41.9%	+30.1%	+79.1%	+20.3%	+9.8%	+48.1%	+43.4%	+41.5%	+9.6%



Seeded watermelon posted volume (lbs.) share gains in 8 of the top 10 markets over the last 52 weeks

Top 10 Market Share of Watermelon Volume (lbs.) with Point Change vs. Prior Year



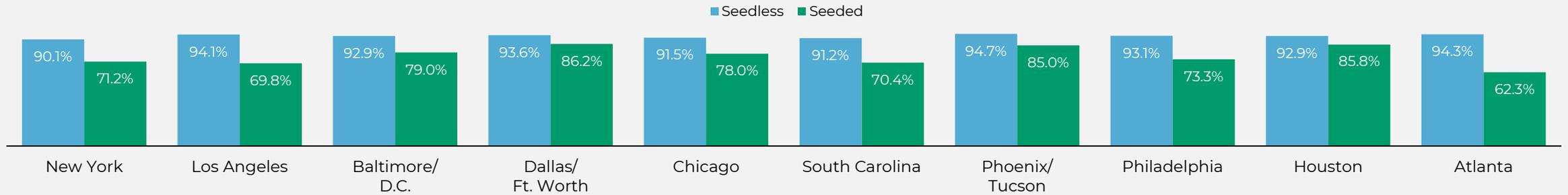
Top 10 Market Share of Watermelon Dollars with Point Change vs. PY

	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Seedless	91.0% +0.7 pts.	91.7% +0.2 pts.	81.3% -1.5 pts.	68.9% -1.6 pts.	82.4% +1.1 pts.	79.7% -0.2 pts.	73.2% +0.2 pts.	84.8% -0.3 pts.	68.3% +0.9 pts.	70.5% +0.6 pts.
Seeded	3.7% -0.0 pts.	2.9% +0.0 pts.	7.3% +0.8 pts.	7.0% +0.5 pts.	2.8% -0.2 pts.	4.8% +0.8 pts.	5.3% +0.8 pts.	5.5% +0.1 pts.	5.3% +0.2 pts.	4.6% +0.3 pts.
Unknown Type	5.3% -0.7 pts.	5.4% -0.3 pts.	11.4% +0.7 pts.	24.1% +1.1 pts.	14.8% -0.9 pts.	15.5% -0.7 pts.	21.5% -0.9 pts.	9.7% +0.2 pts.	26.4% -1.1 pts.	24.9% -0.8 pts.

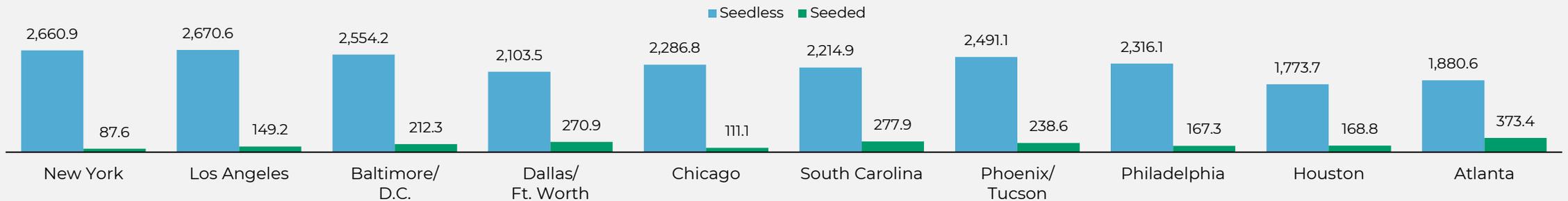


Seedless watermelon velocity outperformed seeded across the top 10 markets and was highest in Los Angeles

Top 10 Market Watermelon ACV Weighted Distribution*



Top 10 Market Watermelon Volume (lbs.) Sales Velocity (\$MM ACV)*



Top 10 Market Dollar Sales Velocity*	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Seedless	\$1,734.4	\$2,317.7	\$1,769.7	\$1,321.8	\$1,680.5	\$1,629.9	\$1,361.1	\$1,578.7	\$900.9	\$1,703.5
Seeded	\$74.7	\$85.6	\$162.7	\$135.6	\$58.5	\$115.6	\$99.6	\$109.5	\$66.7	\$156.2

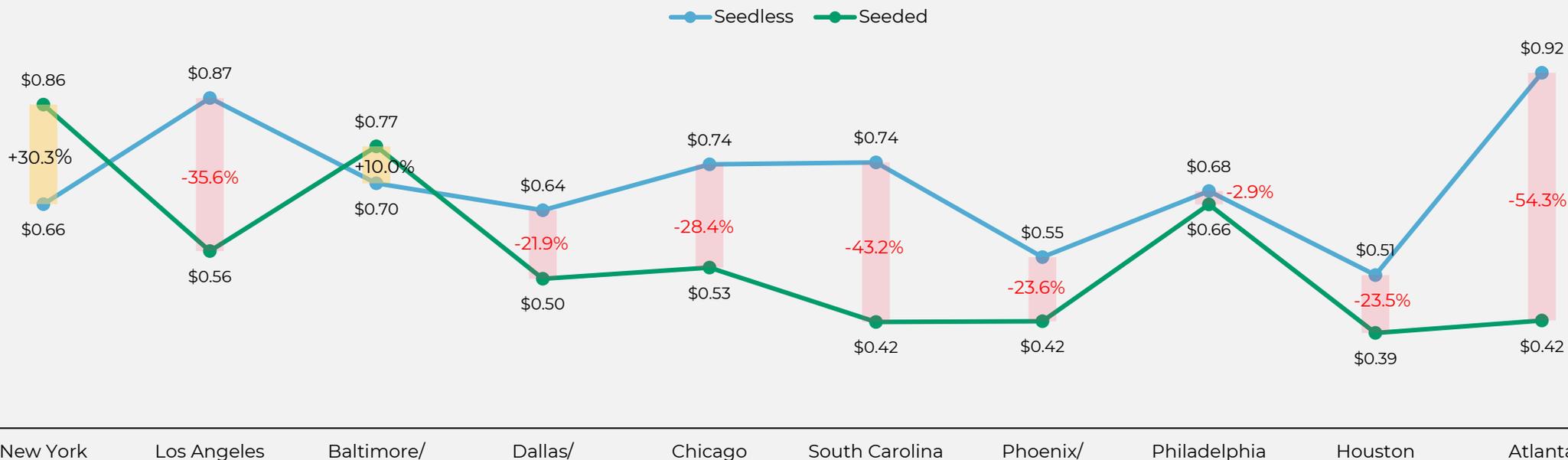
* See Slide 8 for more information on ACV weighted distribution and volume sales velocity (lbs./\$MM ACV)

Source: Circana, 2025



The price gap for seeded vs. seedless watermelon varied widely among the top 10 markets, reaching +11% higher in Baltimore/D.C. and -55% lower in Atlanta

Top 10 Market Watermelon ASP/lb. – Pricing Gap Seeded vs. Seedless



Top 10 Market Watermelon ASP/lb. % Chg. vs. PY	New York	Los Angeles	Baltimore/D.C.	Dallas/Ft. Worth	Chicago	South Carolina	Phoenix/Tucson	Philadelphia	Houston	Atlanta
Seedless	+3.3%	+5.4%	+2.3%	+6.2%	+7.4%	+5.6%	+9.8%	+3.7%	-0.5%	+5.7%
Seeded	+11.1%	+1.5%	-10.4%	-3.1%	+0.2%	-0.7%	-6.0%	+2.6%	-3.0%	-3.5%

A person with long brown hair, wearing a light blue and white striped button-down shirt, is seen from the side, looking down at a white shopping list held in their hands. They are standing in a grocery store's produce section. In the foreground, there are wooden crates filled with red apples on the left and green apples on the right. In the background, there are shelves stocked with various fresh vegetables like leafy greens and yellow squash. A black plastic shopping basket is visible at the bottom of the frame, partially filled with green apples. The overall scene is brightly lit and colorful.

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APPENDIX UNIT SALES TRENDS



Melon Category Unit Sales Trends – Total U.S.						
	Total Melons	Watermelon	Cantaloupe	Honeydew	Mixed	All Other Melons
Unit Sales	829.5M	524.0M	218.3M	38.7M	36.2M	12.4M
Unit Share	100.0%	63.2%	26.3%	4.7%	4.4%	1.5%
Unit Sales Velocity (\$MM/ACV)	-	354.0	148.4	27.4	-	-
Share Change vs. PY	n/a	+0.0 pts.	+0.2 pts.	-0.3 pts.	+0.1 pts.	-0.1 pts.
Incremental Units vs. PY	+12.2M	+7.8M	+4.9M	-1.6M	+1.5M	-0.4M
Growth Rate vs. PY	+1.5%	+1.5%	+2.3%	-3.9%	+4.2%	-2.8%
Unit Sales Velocity vs. PY	-	-1.8%	-0.8%	-3.3%	-	-
Share Change vs. 2021	n/a	+1.1 pts.	-	-	-	-1.1 pts.
Incremental Units vs. 2021	+61.9M	+47.6M	-	-	-	+14.3M
Growth Rate vs. 2021	+8.1%	+10.0%	-	-	-	+4.9%

Watermelon Unit Sales Trends – Total U.S.								
	Whole	Cut	Mini	Seedless	Seeded	Unknown Type	Spring/Summer	Fall/Winter
Unit Sales	197.1M	263.9M	63.0M	421.6M	20.8M	81.6M	415.1M	105.1M
Unit Share	37.6%	50.4%	12.0%	80.5%	3.7%	14.9%	79.8%	20.2%
Unit Sales Velocity (\$MM/ACV)	138.0	185.3	44.1	286.5	15.5	73.5	-	-
Share Change vs. PY	-1.5 pts.	+1.5 pts.	+0.0 pts.	-1.0 pts.	+0.3 pts.	+0.7 pts.	+0.8 pts.	-0.8 pts.
Incremental Units vs. PY	-4.8M	+11.4M	+1.1M	+1.0M	+1.9M	+4.9M	+4.7M	-4.3M
Growth Rate vs. PY	-2.4%	+4.5%	+1.8%	+0.2%	+10.2%	+6.4%	+1.1%	-4.0%
Unit Sales Velocity vs. PY	-4.3%	+5.5%	-3.8%	-2.9%	+5.8%	-3.1%	-	-
Share Change vs. 2021	-5.2 pts.	+5.5 pts.	-0.3 pts.	-1.4 pts.	+0.0 pts.	+1.4 pts.	-1.8 pts.	+1.8 pts.
Incremental Units vs. 2021	-6.8M	+50.2M	+4.2M	+31.5M	+2.0M	+14.1M	+34.4M	+19.2M
Growth Rate vs. 2021	-3.3%	+23.5%	+7.1%	+8.1%	+10.4%	+20.8%	+9.0%	+22.4%



Watermelon Regional Retail Sales 2025 vs. 2021								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Unit Sales	50.4M	55.5M	30.2M	63.3M	66.7M	75.5M	68.3M	108.1M
Unit Share	9.7%	10.7%	5.8%	12.2%	12.9%	14.6%	13.2%	20.9%
Growth Rate vs. 2021	-0.5%	+1.0%	+13.0%	+17.6%	+9.1%	+4.2%	+14.1%	+24.3%

Watermelon Regional Unit Sales Share 2025								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Whole	29.7%	38.9%	54.1%	37.9%	45.6%	42.0%	43.6%	24.1%
Cut	44.5%	41.8%	37.9%	53.6%	42.2%	47.0%	46.2%	69.2%
Mini	25.8%	19.3%	8.0%	8.5%	12.2%	11.0%	10.2%	6.7%
Seedless	91.4%	78.2%	77.4%	78.3%	66.5%	86.6%	75.0%	86.5%
Seeded	2.1%	2.8%	8.5%	6.7%	3.7%	3.8%	4.8%	2.3%
Unknown Type	6.5%	18.8%	14.1%	15.0%	29.8%	9.6%	20.2%	11.2%

Watermelon Regional Unit Growth Rate 2025 vs. Prior Year								
	California	West	Plains	South Central	Great Lakes	Northeast	Midsouth	Southeast
Whole	-5.8%	+3.1%	+0.9%	-2.1%	-5.7%	-2.0%	-0.8%	-5.0%
Cut	+7.1%	+8.5%	+25.8%	-1.3%	+9.8%	+0.1%	+3.6%	+3.3%
Mini	+8.7%	-3.3%	+5.0%	-3.0%	+12.5%	+0.9%	-0.9%	-5.8%
Seedless	+3.6%	+2.8%	+11.2%	-4.5%	+2.1%	-0.4%	-1.8%	-1.6%
Seeded	-7.3%	+24.6%	+9.0%	+11.8%	+19.6%	-6.1%	+12.5%	+20.4%

Top 10 Markets 2025 vs. 2021		
	Unit Sales	% Change vs. 2021
New York	20.7M	+6.4%
Los Angeles	24.9M	-3.5%
Baltimore/D.C.	12.8M	-1.3%
Dallas/Ft. Worth	13.6M	+21.5%
Chicago	15.0M	+5.6%
South Carolina	12.6M	+23.2%
Phoenix/Tucson	13.7M	+20.4%
Philadelphia	16.0M	+18.1%
Houston	10.6M	+28.8%
Atlanta	11.3M	+26.9%



Thank You!

