



Retail Scan Data

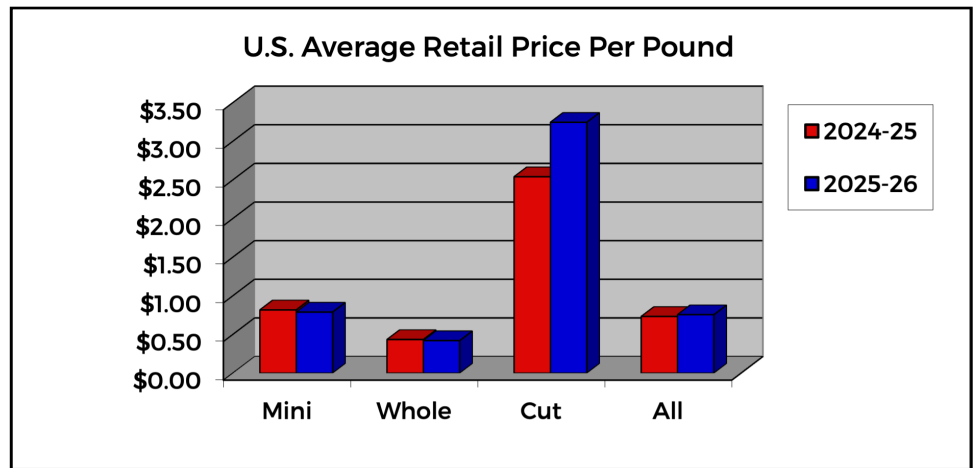
Compiled by the National Watermelon Promotion Board



Data current through
March 22, 2026

Retail Sales in Pounds				
Category	2024-25	2025-26	% Change	2025-26 Sales Share
Mini	368,813,973	384,906,385	4.4%	9.7%
Whole	3,067,041,085	3,168,894,454	3.3%	79.7%
Cut	488,599,862	421,844,922	-13.7%	10.6%
Total	3,924,454,919	3,975,645,762	1.3%	100.0%

Retail Price per Pound		
Category	2024-25	2025-26
Mini	\$0.82	\$0.79
Whole	\$0.43	\$0.42
Cut	\$2.54	\$3.25
All	\$0.73	\$0.76



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2024-25	\$0.49	\$2.28	\$0.89
California 2025-26	\$0.47	\$3.15	\$0.84
Great Lakes 2024-25	\$0.43	\$3.51	\$0.68
Great Lakes 2025-26	\$0.41	\$3.77	\$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	\$2.19	\$0.91
Northeast 2025-26	\$0.42	\$2.53	\$0.86
Plains 2024-25	\$0.40	\$2.96	\$0.86
Plains 2025-26	\$0.39	\$3.29	\$0.85
Southcentral 2024-25	\$0.43	\$2.03	\$0.79
Southcentral 2025-26	\$0.41	\$3.61	\$0.79
Southeast 2024-25	\$0.44	\$2.87	\$0.85
Southeast 2025-26	\$0.42	\$3.32	\$0.82
West 2024-25	\$0.46	\$2.31	\$0.78
West 2025-26	\$0.43	\$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 March 22, 2026 versus the prior 52 weeks.

For questions or expanded information reach out to:

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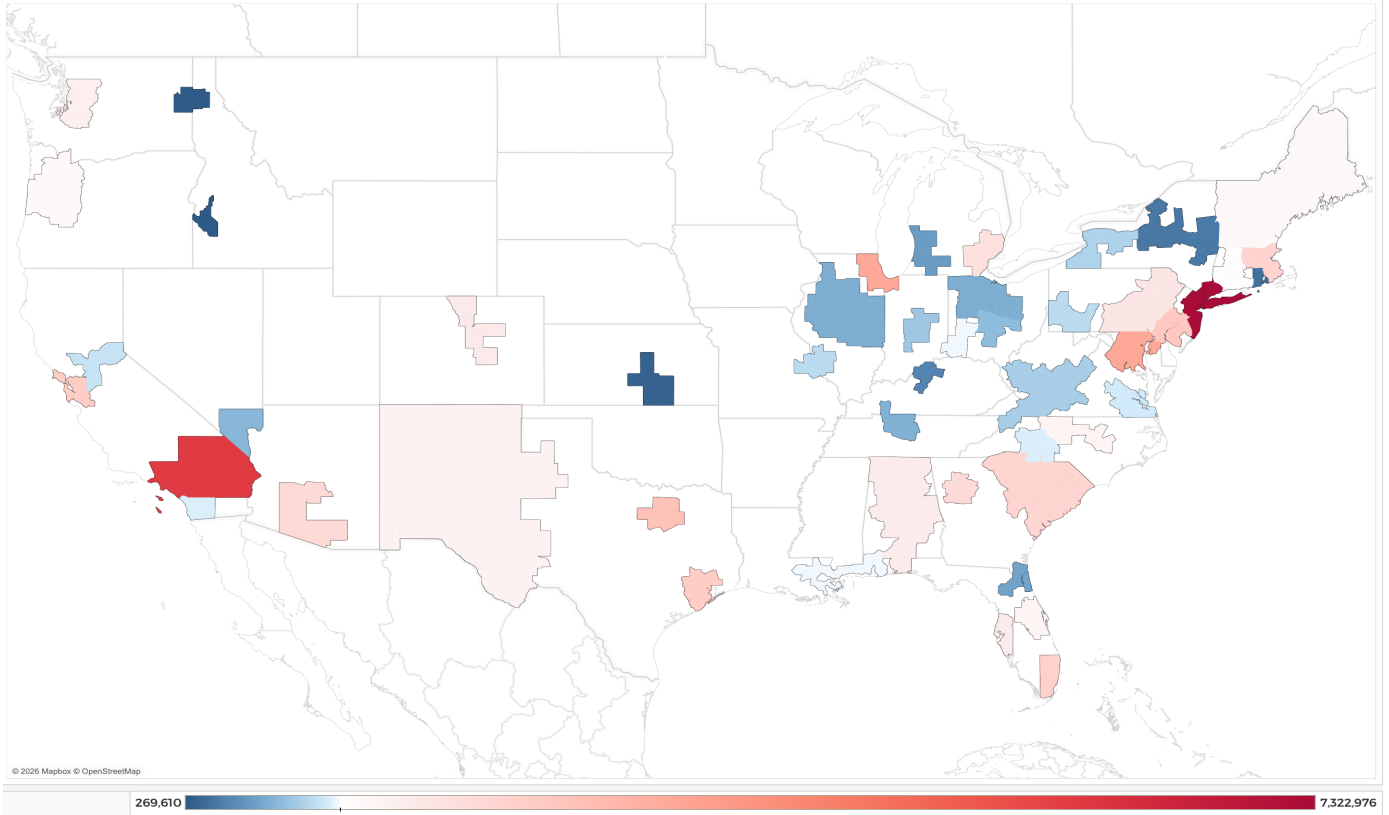
Scanner Data Regions



Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2024-25	341,343,544	54,382,172	81,157,967	476,883,683
California 2025-26	363,751,501	41,477,951	88,086,833	493,316,284
Percent Growth	6.6%	-23.7%	8.5%	3.4%
2025-26 % of Total	73.7%	8.4%	17.9%	100.0%
Great Lakes 2024-25	448,641,433	35,484,476	47,644,559	531,770,469
Great Lakes 2025-26	451,338,830	36,845,270	52,336,664	540,520,765
Percent Growth	0.6%	3.8%	9.8%	1.6%
2025-26 % of Total	83.5%	6.8%	9.7%	100.0%
Midsouth 2024-25	446,383,410	53,957,459	43,270,376	543,611,246
Midsouth 2025-26	450,013,390	53,149,323	45,620,469	548,783,182
Percent Growth	0.8%	-1.5%	5.4%	1.0%
2025-26 % of Total	82.0%	9.7%	8.3%	100.0%
Northeast 2024-25	512,095,977	91,352,455	46,419,538	649,867,970
Northeast 2025-26	508,696,204	80,739,069	50,594,237	640,029,511
Percent Growth	-0.7%	-11.6%	9.0%	-1.5%
2025-26 % of Total	79.5%	12.6%	7.9%	100.0%
Plains 2024-25	246,189,693	16,594,377	14,210,305	276,994,375
Plains 2025-26	259,189,541	20,221,281	14,065,784	293,476,606
Percent Growth	5.3%	21.9%	-1.0%	6.0%
2025-26 % of Total	88.3%	6.9%	4.8%	100.0%
Southcentral 2024-25	338,027,323	81,273,857	28,729,539	448,030,719
Southcentral 2025-26	359,220,429	47,418,299	29,083,186	435,721,914
Percent Growth	6.3%	-41.7%	1.2%	-2.7%
2025-26 % of Total	82.4%	10.9%	6.7%	100.0%
Southeast 2024-25	385,140,928	106,213,593	45,381,197	536,735,719
Southeast 2025-26	390,881,960	105,827,720	44,064,999	540,774,680
Percent Growth	1.5%	-0.4%	-2.9%	0.8%
2025-26 % of Total	72.3%	19.6%	8.1%	100.0%
West 2024-25	349,218,775	49,341,473	62,000,491	460,560,739
West 2025-26	385,802,598	36,166,008	61,054,213	483,022,820
Percent Growth	10.5%	-26.7%	-1.5%	4.9%
2025-26 % of Total	79.9%	7.5%	12.6%	100.0%



Number of Households per Market

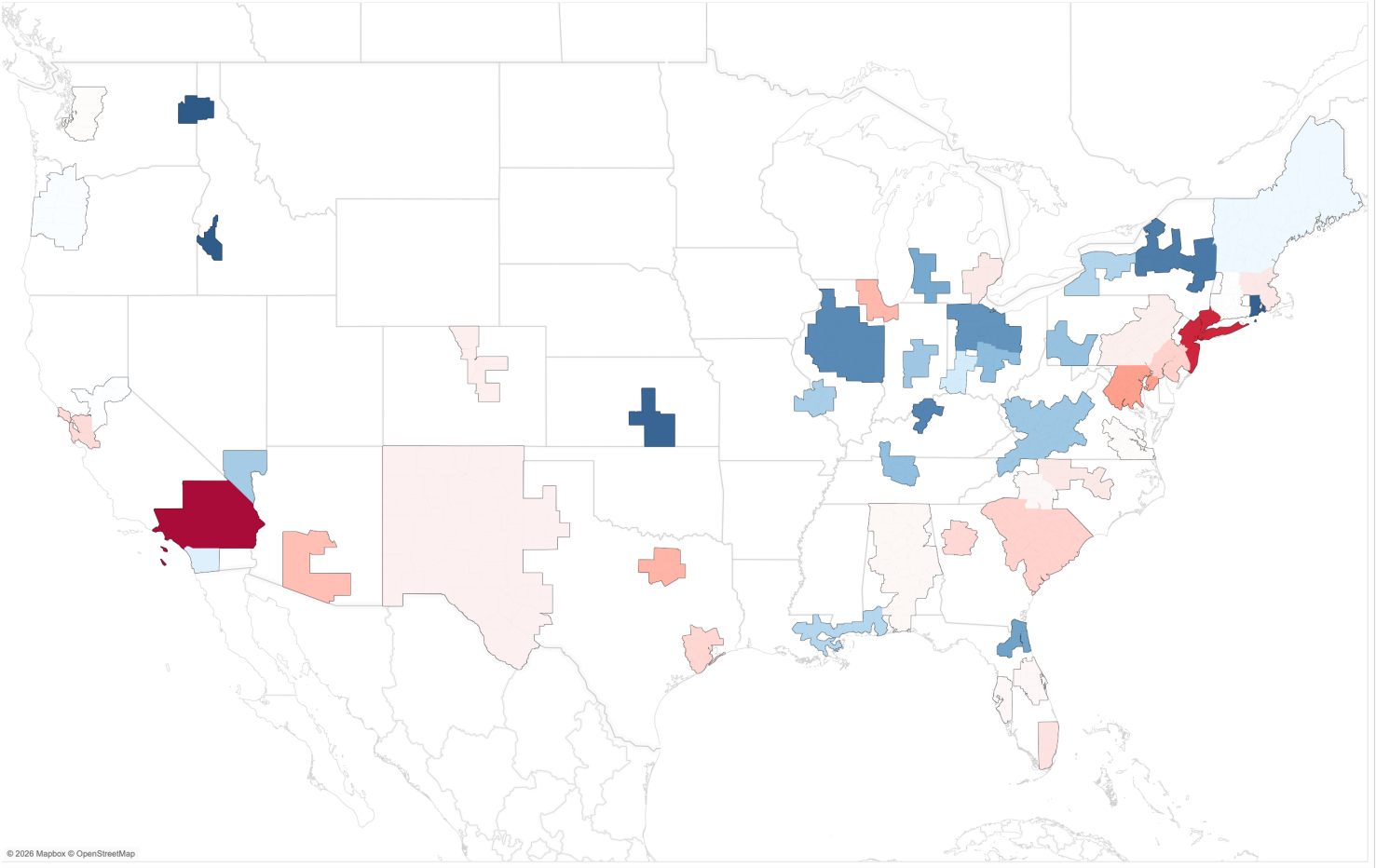


Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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

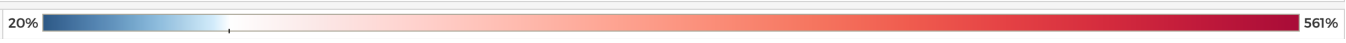


Scanner Data Markets — Total

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



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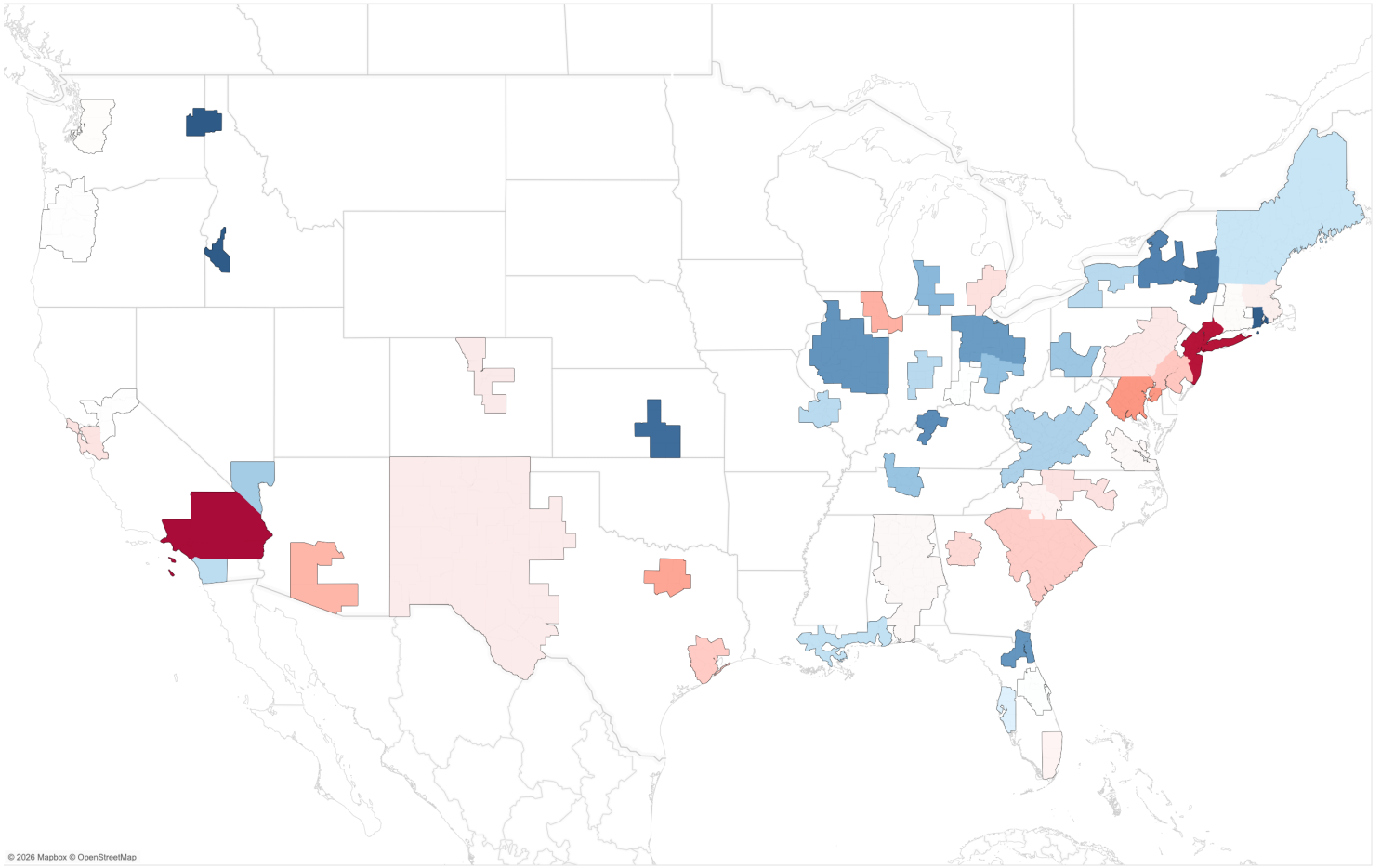


Largest % Increase				Rest of Markets			
	Prior #	Current #	% Change		Prior #	Current #	% Change
BUFFALO/ROCHESTER	32,371,298	34,394,023	6.2%	CINCINNATI/DAYTON	38,444,505	39,219,346	2.0%
PORTLAND	39,397,963	41,839,518	6.2%	ST. LOUIS	32,656,678	33,165,022	1.6%
WEST TEX/NEW MEXICO	49,277,613	52,304,189	6.1%	SEATTLE	44,278,641	44,964,848	1.5%
GRAND RAPIDS	23,751,148	25,160,627	5.9%	TAMPA	46,749,670	47,296,027	1.2%
HOUSTON	67,820,677	71,755,741	5.8%	COLUMBUS	28,791,637	29,079,118	1.0%
LAS VEGAS	30,780,667	32,524,219	5.7%	RICHMOND/NORFOLK	44,377,814	44,769,260	0.9%
SPOKANE	7,962,198	8,372,458	5.2%	ROANOKE	31,287,865	31,405,950	0.4%
RALEIGH/GREENSBORO	54,554,479	57,284,917	5.0%	SAN DIEGO	39,831,986	39,932,906	0.3%
DENVER	50,902,770	53,383,631	4.9%	PITTSBURGH	30,249,686	30,284,988	0.1%
SACRAMENTO	40,127,623	42,025,750	4.7%	LOUISVILLE	17,497,649	17,474,877	-0.1%
WICHITA	10,434,413	10,920,284	4.7%	SAN FRANCISCO	68,523,329	68,378,209	-0.2%
SYRACUSE	15,257,294	15,964,076	4.6%	NEW ORLEANS/MOBILE	35,029,359	34,945,610	-0.2%
CHARLOTTE	44,973,937	46,957,021	4.4%	BIRMINGHAM/MONTGOMERY	48,019,160	47,862,591	-0.3%
HARRISBURG/SCRANTON	50,482,749	52,656,993	4.3%	DALLAS/FT. WORTH	100,362,784	99,829,632	-0.5%
PHOENIX/TUCSON	87,637,733	91,211,379	4.1%	ATLANTA	71,071,670	70,076,061	-1.4%
LOS ANGELES	228,424,968	237,215,523	3.8%	HARTFORD/SPRINGFIELD	43,181,629	42,552,223	-1.5%
INDIANAPOLIS	30,573,366	31,603,290	3.4%	PHILADELPHIA	78,079,825	75,941,091	-2.7%
SOUTH CAROLINA	73,300,777	75,619,912	3.2%	NEW ENGLAND	42,298,641	41,107,838	-2.8%
DETROIT	55,952,676	57,701,864	3.1%	BOISE	9,000,851	8,671,459	-3.7%
ORLANDO	46,233,599	47,497,184	2.7%	NEW YORK	215,612,177	207,454,990	-3.8%
PEORIA/SPRINGFIELD	18,318,241	18,803,724	2.7%	BALTIMORE/WASHINGTON	119,634,772	115,070,296	-3.8%
TOLEDO	20,507,158	21,029,775	2.5%	PROVIDENCE	10,450,379	9,987,817	-4.4%
JACKSONVILLE	23,206,137	23,791,021	2.5%	CHICAGO	100,660,083	96,201,259	-4.4%
ALBANY	14,637,961	14,987,373	2.4%	MIAMI/FT. LAUDERDALE	66,275,830	63,195,877	-4.6%
NASHVILLE	28,994,019	29,672,719	2.3%	BOSTON	61,594,832	58,282,302	-5.4%



Scanner Data Markets — Whole

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



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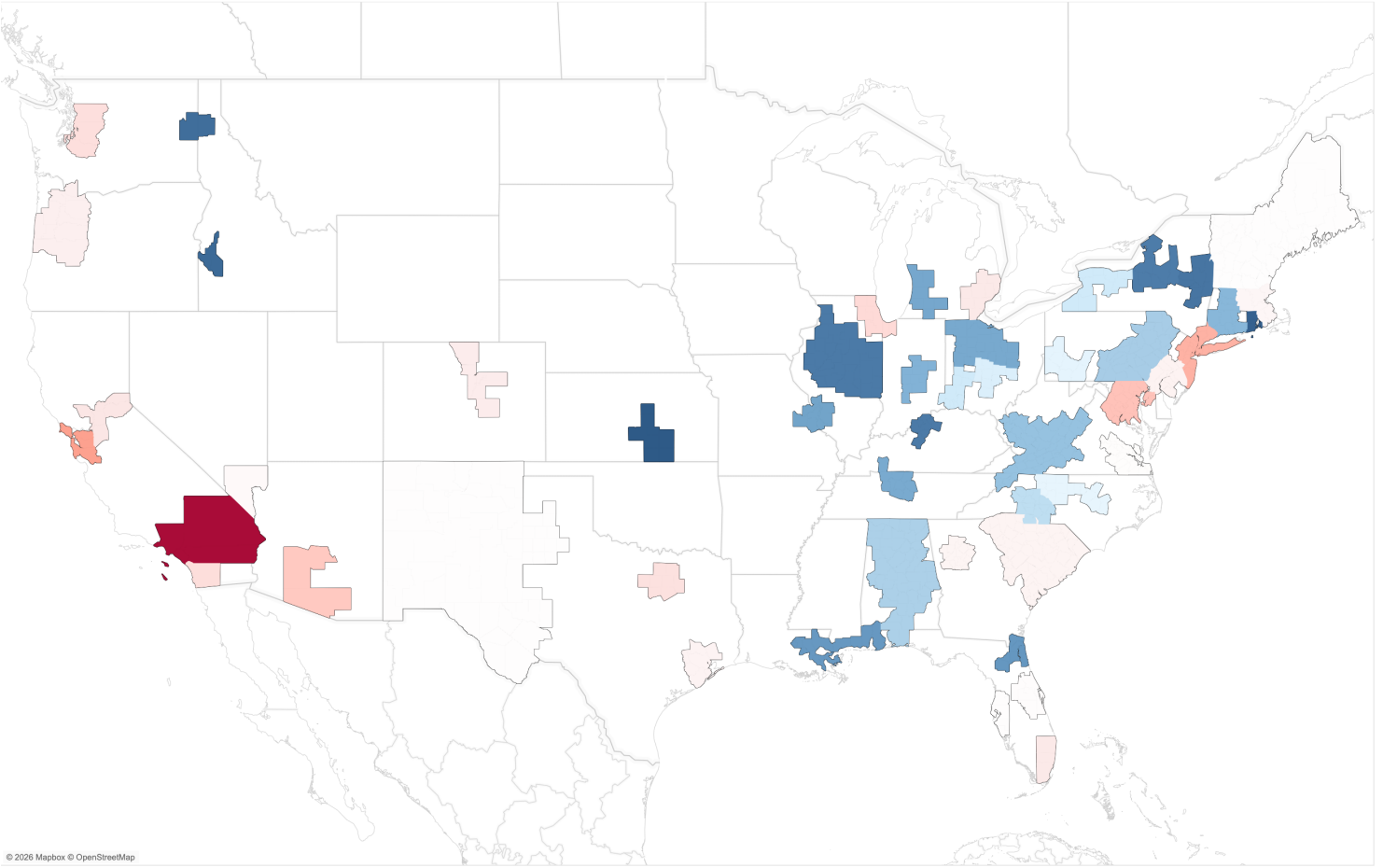


Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
SPOKANE	5,632,805	6,543,577	16.2%	JACKSONVILLE	15,987,855	16,480,930	3.1%
PORTLAND	28,621,952	32,470,384	13.4%	NASHVILLE	22,981,866	23,556,402	2.5%
LAS VEGAS	22,105,590	24,979,886	13.0%	BOSTON	39,200,177	39,976,433	2.0%
DENVER	38,859,439	42,972,906	10.6%	TOLEDO	17,163,987	17,458,002	1.7%
SEATTLE	30,316,632	33,402,684	10.2%	PEORIA/SPRINGFIELD	15,939,552	16,114,061	1.1%
HOUSTON	55,912,638	61,596,170	10.2%	CINCINNATI/DAYTON	31,942,701	32,291,576	1.1%
LOS ANGELES	161,671,656	176,972,366	9.5%	ALBANY	11,783,402	11,911,925	1.1%
WEST TEX/NEW MEXICO	39,615,634	42,798,114	8.0%	NEW ORLEANS/MOBILE	27,952,300	28,217,095	0.9%
PHOENIX/TUCSON	68,725,201	73,853,963	7.5%	RICHMOND/NORFOLK	35,004,764	35,172,451	0.5%
DALLAS/FT. WORTH	77,304,736	82,820,935	7.1%	ATLANTA	52,071,280	52,150,170	0.2%
SAN DIEGO	25,700,276	27,496,848	7.0%	PROVIDENCE	7,253,347	7,249,943	0.0%
GRAND RAPIDS	20,402,255	21,707,194	6.4%	COLUMBUS	23,035,787	23,021,727	-0.1%
RALEIGH/GREENSBORO	44,998,743	47,788,617	6.2%	PHILADELPHIA	63,917,640	63,555,714	-0.6%
BOISE	6,209,886	6,569,534	5.8%	BIRMINGHAM/MONTGOMERY	36,107,626	35,894,057	-0.6%
WICHITA	9,254,167	9,765,576	5.5%	NEW ENGLAND	29,093,421	28,865,657	-0.8%
HARRISBURG/SCRANTON	42,061,885	44,222,284	5.1%	HARTFORD/SPRINGFIELD	34,517,352	34,198,603	-0.9%
BUFFALO/ROCHESTER	25,921,970	27,142,939	4.7%	ROANOKE	26,231,823	25,838,715	-1.5%
CHARLOTTE	36,570,697	38,125,214	4.3%	LOUISVILLE	15,146,595	14,874,367	-1.8%
SYRACUSE	12,600,672	13,102,948	4.0%	ST. LOUIS	27,861,956	27,270,909	-2.1%
SOUTH CAROLINA	57,704,389	59,937,273	3.9%	PITTSBURGH	24,552,465	24,020,802	-2.2%
ORLANDO	31,099,466	32,271,620	3.8%	SAN FRANCISCO	47,674,351	46,325,761	-2.8%
SACRAMENTO	31,685,648	32,842,180	3.7%	BALTIMORE/WASHINGTON	95,097,414	91,993,024	-3.3%
DETROIT	46,426,506	48,070,829	3.5%	NEW YORK	176,618,723	169,164,192	-4.2%
TAMPA	29,727,323	30,703,338	3.3%	MIAMI/FT. LAUDERDALE	39,702,522	37,980,633	-4.3%
INDIANAPOLIS	26,255,992	27,090,439	3.2%	CHICAGO	82,434,614	76,936,805	-6.7%

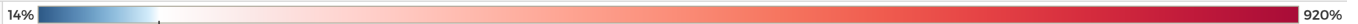


Scanner Data Markets — Mini

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

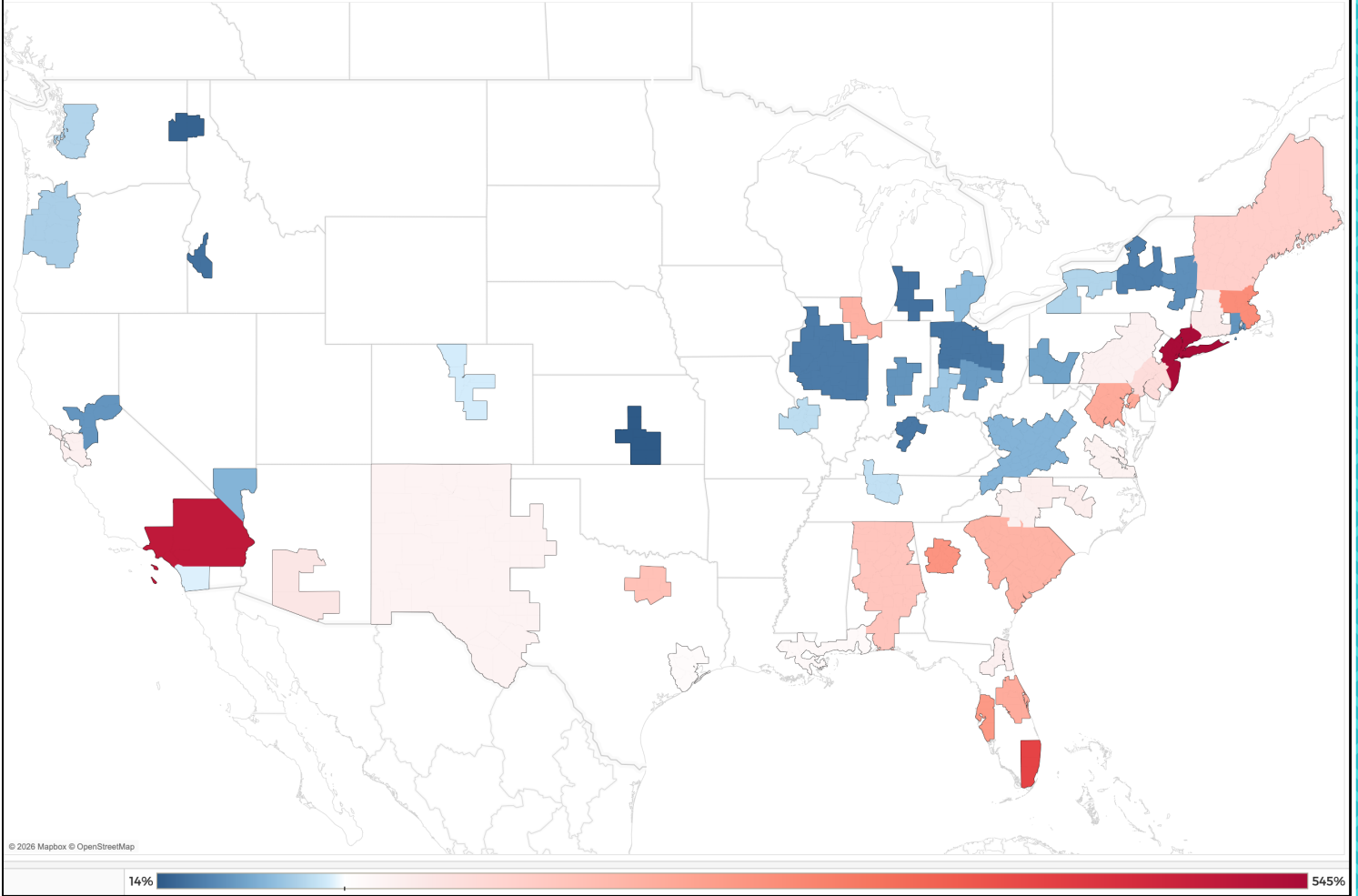


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Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
CHICAGO	6,571,162	8,873,630	35.0%	BOISE	904,552	932,045	3.0%
ST. LOUIS	1,692,565	2,213,492	30.8%	CHARLOTTE	3,403,127	3,497,455	2.8%
PITTSBURGH	3,296,818	3,951,674	19.9%	COLUMBUS	3,779,232	3,878,553	2.6%
BUFFALO/ROCHESTER	3,232,192	3,775,956	16.8%	NEW ENGLAND	4,213,087	4,317,572	2.5%
PROVIDENCE	628,068	728,528	16.0%	HARTFORD/SPRINGFIELD	2,577,429	2,640,063	2.4%
PHILADELPHIA	4,840,874	5,569,572	15.1%	PORTLAND	5,947,077	6,011,220	1.1%
BALTIMORE/WASHINGTON	10,759,536	12,210,121	13.5%	TOLEDO	2,315,935	2,338,867	1.0%
SPOKANE	920,303	1,021,675	11.0%	DETROIT	6,727,878	6,755,827	0.4%
PEORIA/SPRINGFIELD	1,165,596	1,292,935	10.9%	SEATTLE	8,098,089	8,073,879	-0.3%
SAN DIEGO	7,525,881	8,326,559	10.6%	RALEIGH/GREENSBORO	4,030,285	3,963,714	-1.7%
ROANOKE	2,611,990	2,874,365	10.0%	RICHMOND/NORFOLK	4,460,924	4,385,530	-1.7%
JACKSONVILLE	1,773,164	1,945,566	9.7%	BIRMINGHAM/MONTGOMERY	3,269,748	3,212,060	-1.8%
NEW YORK	13,359,255	14,454,359	8.2%	ORLANDO	4,540,612	4,460,295	-1.8%
SACRAMENTO	6,634,018	7,160,070	7.9%	SOUTH CAROLINA	5,584,189	5,478,421	-1.9%
LOS ANGELES	35,490,487	38,105,357	7.4%	NASHVILLE	2,426,872	2,361,055	-2.7%
SAN FRANCISCO	15,634,516	16,663,884	6.6%	PHOENIX/TUCSON	11,613,046	11,281,626	-2.9%
LOUISVILLE	1,215,272	1,293,899	6.5%	INDIANAPOLIS	2,605,569	2,520,016	-3.3%
ALBANY	1,117,705	1,189,442	6.4%	ATLANTA	5,588,195	5,349,308	-4.3%
NEW ORLEANS/MOBILE	1,864,087	1,980,270	6.2%	LAS VEGAS	5,075,093	4,838,537	-4.7%
SYRACUSE	1,271,313	1,345,751	5.9%	DALLAS/FT. WORTH	8,356,709	7,920,510	-5.2%
HARRISBURG/SCRANTON	2,975,982	3,137,800	5.4%	TAMPA	4,602,210	4,342,522	-5.6%
BOSTON	4,929,485	5,162,116	4.7%	HOUSTON	5,873,217	5,528,789	-5.9%
GRAND RAPIDS	2,197,878	2,290,180	4.2%	MIAMI/FT. LAUDERDALE	7,608,813	6,794,822	-10.7%
WEST TEX/NEW MEXICO	4,162,205	4,332,144	4.1%	WICHITA	636,319	563,093	-11.5%
CINCINNATI/DAYTON	3,635,564	3,777,768	3.9%	DENVER	7,231,396	6,371,409	-11.9%

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



Largest % Increase				Rest of Markets			
	Prior #	Current #	% Change	Prior #	Current #	% Change	
TOLEDO	1,027,237	1,232,906	20.0%	HARRISBURG/SCRANTON	5,444,883	5,296,909	-2.7%
ST. LOUIS	3,102,157	3,680,621	18.6%	MIAMI/FT. LAUDERDALE	18,964,495	18,420,422	-2.9%
INDIANAPOLIS	1,711,805	1,992,835	16.4%	PITTSBURGH	2,400,403	2,312,511	-3.7%
PEORIA/SPRINGFIELD	1,213,093	1,396,729	15.1%	WEST TEX/NEW MEXICO	5,499,774	5,173,930	-5.9%
LOUISVILLE	1,135,782	1,306,610	15.0%	HARTFORD/SPRINGFIELD	6,086,848	5,713,557	-6.1%
SACRAMENTO	1,807,957	2,023,501	11.9%	ATLANTA	13,412,195	12,576,583	-6.2%
COLUMBUS	1,976,619	2,178,837	10.2%	NEW YORK	25,634,199	23,836,438	-7.0%
ROANOKE	2,444,051	2,692,869	10.2%	NEW ORLEANS/MOBILE	5,212,972	4,748,246	-8.9%
CINCINNATI/DAYTON	2,866,239	3,150,002	9.9%	CHICAGO	11,654,307	10,390,824	-10.8%
SYRACUSE	1,385,309	1,515,376	9.4%	NEW ENGLAND	8,992,133	7,924,608	-11.9%
WICHITA	543,926	591,615	8.8%	DENVER	4,811,935	4,039,316	-16.1%
ALBANY	1,736,854	1,886,006	8.6%	PHOENIX/TUCSON	7,299,487	6,075,790	-16.8%
BUFFALO/ROCHESTER	3,217,136	3,475,128	8.0%	BALTIMORE/WASHINGTON	13,777,822	10,867,151	-21.1%
CHARLOTTE	5,000,114	5,334,352	6.7%	PROVIDENCE	2,568,963	2,009,347	-21.8%
RICHMOND/NORFOLK	4,912,125	5,211,279	6.1%	HOUSTON	6,034,822	4,630,782	-23.3%
NASHVILLE	3,585,281	3,755,263	4.7%	BOSTON	17,465,169	13,143,752	-24.7%
SAN FRANCISCO	5,214,461	5,388,564	3.3%	LAS VEGAS	3,599,984	2,705,796	-24.8%
DETROIT	2,798,292	2,875,208	2.7%	PHILADELPHIA	9,321,311	6,815,805	-26.9%
SOUTH CAROLINA	10,012,198	10,204,219	1.9%	LOS ANGELES	31,262,825	22,137,800	-29.2%
ORLANDO	10,593,521	10,765,268	1.6%	PORTLAND	4,828,934	3,357,913	-30.5%
BIRMINGHAM/MONTGOMERY	8,641,786	8,756,474	1.3%	SAN DIEGO	6,605,829	4,109,499	-37.8%
GRAND RAPIDS	1,151,015	1,163,253	1.1%	BOISE	1,886,413	1,169,880	-38.0%
RALEIGH/GREENSBORO	5,525,450	5,532,586	0.1%	DALLAS/FT. WORTH	14,701,339	9,088,187	-38.2%
TAMPA	12,420,136	12,250,167	-1.4%	SEATTLE	5,863,919	3,488,285	-40.5%
JACKSONVILLE	5,445,119	5,364,525	-1.5%	SPOKANE	1,409,089	807,205	-42.7%