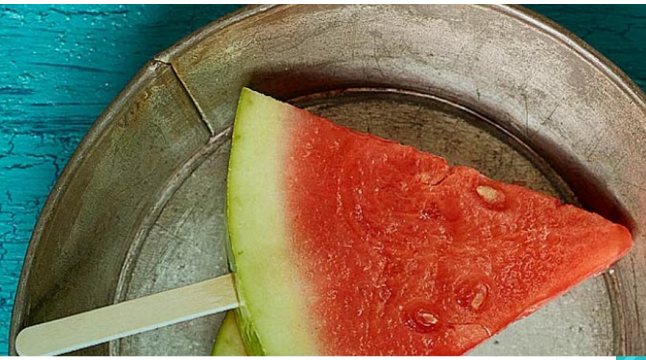




# Retail Scan Data

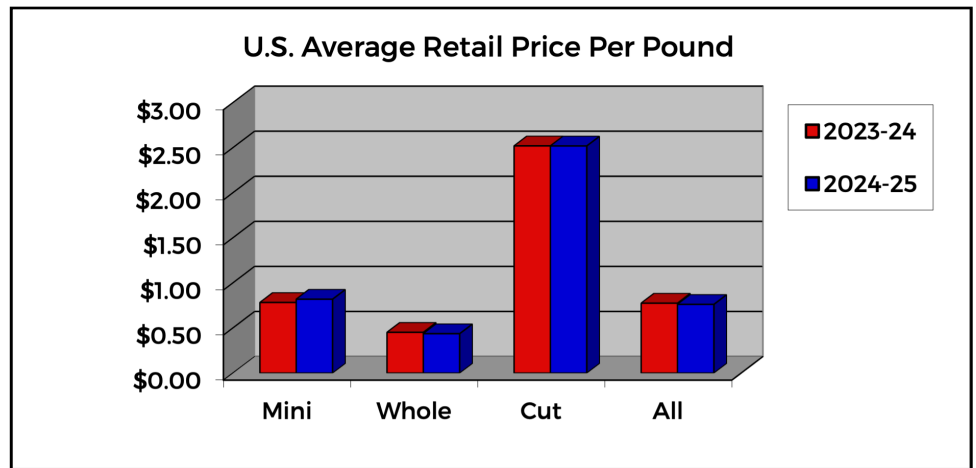
Compiled by the National Watermelon Promotion Board



Data current through  
March 23, 2025

Retail Sales in Pounds				
Category	2023-24	2024-25	% Change	2024-25 Sales Share
Mini	333,032,123	318,056,949	-4.5%	9.1%
Whole	2,619,270,467	2,689,464,559	2.7%	77.0%
Cut	484,189,487	487,223,750	0.6%	13.9%
Total	3,436,492,077	3,494,745,258	1.7%	100.0%

Retail Price per Pound		
Category	2023-24	2024-25
Mini	\$0.78	\$0.82
Whole	\$0.45	\$0.44
Cut	\$2.52	\$2.52
All	\$0.78	\$0.76



Regional Price Per Pound			
Region	Whole \$/Lb	Cut \$/Lb	Mini \$/Lb
California 2023-24	\$0.48	\$2.32	\$0.82
California 2024-25	\$0.49	\$2.33	\$0.95
Great Lakes 2023-24	\$0.46	\$3.32	\$0.66
Great Lakes 2024-25	\$0.45	\$3.50	\$0.66
Midsouth 2023-24	\$0.41	\$2.84	\$0.75
Midsouth 2024-25	\$0.41	\$2.93	\$0.74
Northeast 2023-24	\$0.46	\$2.11	\$0.93
Northeast 2024-25	\$0.41	\$2.18	\$0.93
Plains 2023-24	\$0.44	\$2.91	\$0.88
Plains 2024-25	\$0.41	\$2.74	\$0.85
Southcentral 2023-24	\$0.45	\$2.14	\$0.78
Southcentral 2024-25	\$0.44	\$2.00	\$0.79
Southeast 2023-24	\$0.45	\$2.94	\$0.79
Southeast 2024-25	\$0.45	\$2.87	\$0.84
West 2023-24	\$0.47	\$2.24	\$0.73
West 2024-25	\$0.45	\$2.30	\$0.77

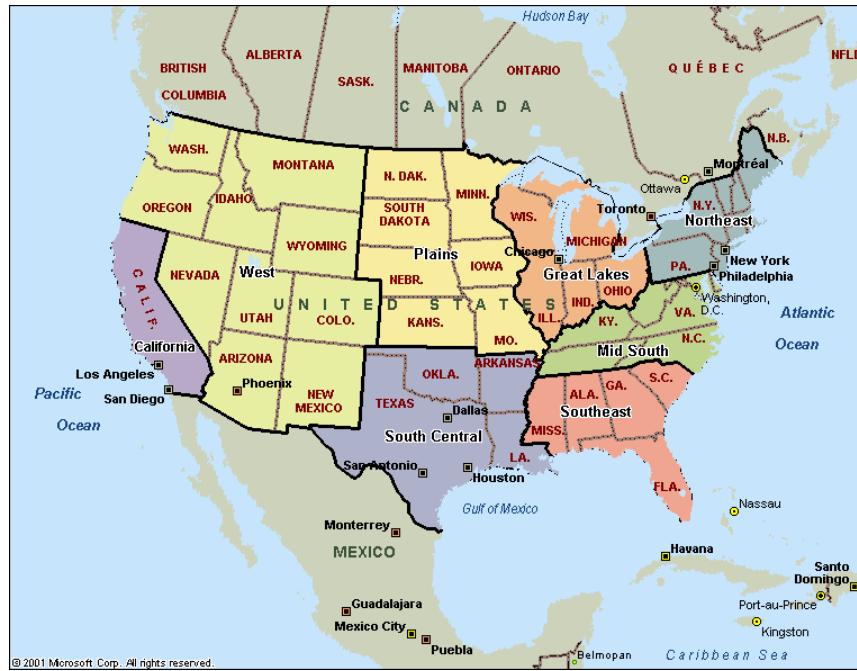
The information shown throughout is derived from retail scan data supplied by Circana. It represents the universe of traditional grocery stores with sales of \$2M or more per year excluding some supercenters covering roughly 85% of the retail universe. This data reflects the 52-week period ending March 23, 2025 versus the prior 52 weeks.

For questions or expanded information reach out to:

Jason Hanselman • Phone: (407) 925-5285 • Email: [jasonh116@gmail.com](mailto:jasonh116@gmail.com)

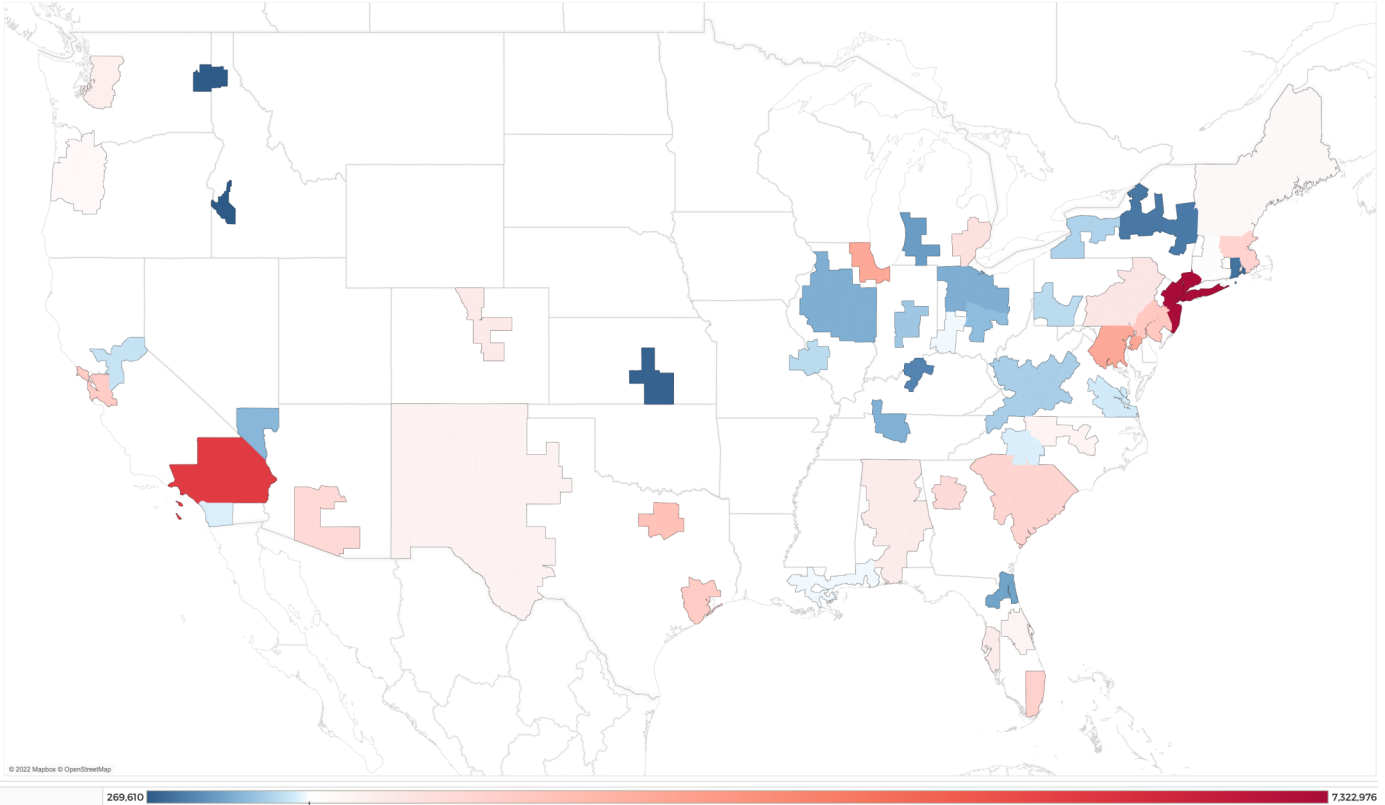


## Scanner Data Regions



Region	Whole Pounds	Cut Pounds	Mini Pounds	Total
California 2023-24	221,208,642	50,158,541	62,627,120	333,994,304
California 2024-25	235,816,201	50,899,230	59,357,234	346,072,665
Percent Growth	6.6%	1.5%	-5.2%	3.6%
2024-25 % of Total	68.1%	14.7%	17.2%	100.0%
Great Lakes 2023-24	399,899,313	35,807,424	45,826,074	481,532,811
Great Lakes 2024-25	412,735,115	34,463,894	43,384,868	490,583,877
Percent Growth	3.2%	-3.8%	-5.3%	1.9%
2024-25 % of Total	84.1%	7.0%	8.8%	100.0%
Midsouth 2023-24	404,268,659	52,378,223	39,842,558	496,489,440
Midsouth 2024-25	414,231,018	52,012,452	39,189,799	505,433,269
Percent Growth	2.5%	-0.7%	-1.6%	1.8%
2024-25 % of Total	82.0%	10.3%	7.8%	100.0%
Northeast 2023-24	407,170,623	96,586,020	42,463,637	546,220,281
Northeast 2024-25	452,615,477	91,433,282	39,779,937	583,828,696
Percent Growth	11.2%	-5.3%	-6.3%	6.9%
2024-25 % of Total	77.5%	15.7%	6.8%	100.0%
Plains 2023-24	208,551,493	18,131,080	12,388,000	239,070,573
Plains 2024-25	210,955,605	18,330,638	11,747,908	241,034,151
Percent Growth	1.2%	1.1%	-5.2%	0.8%
2024-25 % of Total	87.5%	7.6%	4.9%	100.0%
Southcentral 2023-24	342,628,952	77,628,182	27,177,524	447,434,658
Southcentral 2024-25	322,832,082	84,435,655	26,680,029	433,947,766
Percent Growth	-5.8%	8.8%	-1.8%	-3.0%
2024-25 % of Total	74.4%	19.5%	6.1%	100.0%
Southeast 2023-24	356,134,797	100,579,307	45,590,802	502,304,907
Southeast 2024-25	355,820,513	106,065,347	42,889,297	504,775,157
Percent Growth	-0.1%	5.5%	-5.9%	0.5%
2024-25 % of Total	70.5%	21.0%	8.5%	100.0%
West 2023-24	279,407,987	52,920,710	57,116,407	389,445,104
West 2024-25	284,458,549	49,583,253	55,027,876	389,069,678
Percent Growth	1.8%	-6.3%	-3.7%	-0.1%
2024-25 % of Total	73.1%	12.7%	14.1%	100.0%

Number of Households per Market



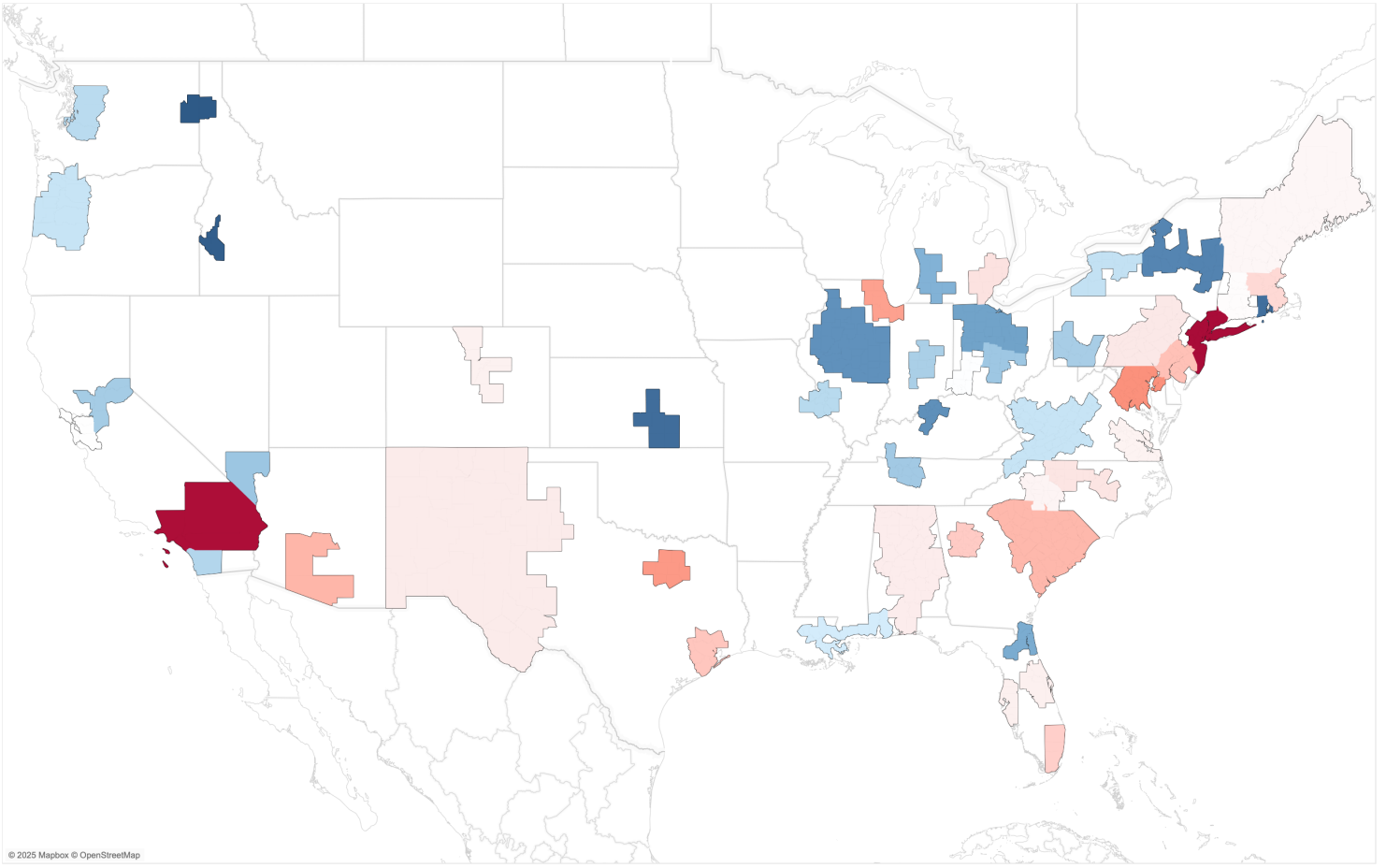
Market	Population	Households	Market	Population	Households
NEW YORK	19,959,514	7,322,976	HARTFORD/SPRINGFIELD	3,246,920	1,266,721
LOS ANGELES	17,923,688	5,828,361	NEW ORLEANS/MOBILE	3,138,652	1,210,254
CHICAGO	9,024,641	3,326,661	SACRAMENTO	3,105,662	1,097,351
BALTIMORE/WASHINGTON	8,747,475	3,302,814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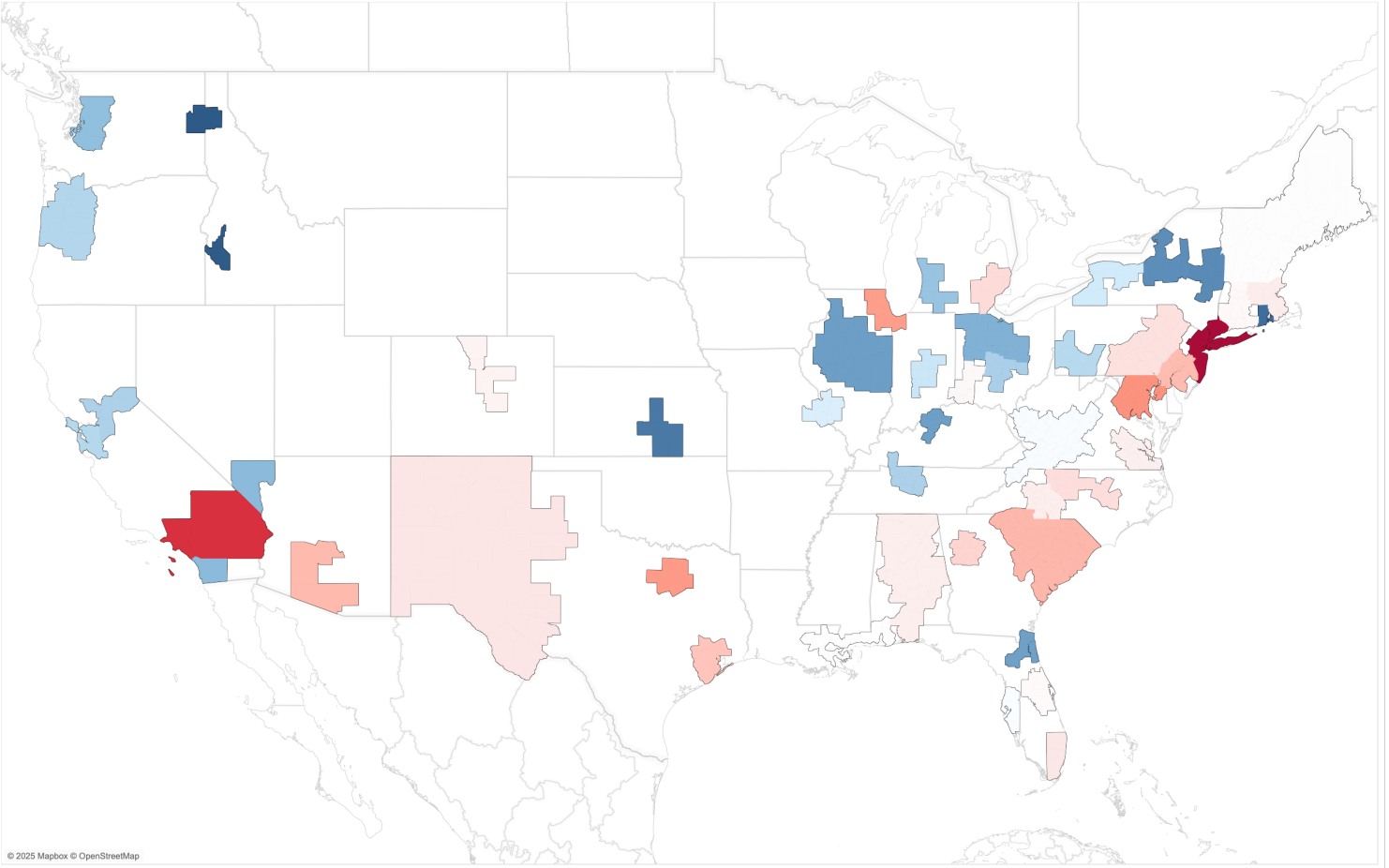


Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PROVIDENCE	9,150,502	10,517,969	14.9%	HARRISBURG/SCRANTON	47,000,717	47,986,015	2.1%
BOISE	6,440,540	7,203,602	11.8%	PEORIA/SPRINGFIELD	16,865,530	17,107,998	1.4%
LOUISVILLE	15,109,149	16,768,788	11.0%	INDIANAPOLIS	28,320,977	28,559,984	0.8%
NEW YORK	160,766,342	176,598,344	9.8%	PHOENIX/TUCSON	76,077,709	76,586,167	0.7%
ST. LOUIS	27,931,974	30,401,137	8.8%	LAS VEGAS	26,571,027	26,741,016	0.6%
DETROIT	47,186,827	51,347,011	8.8%	TAMPA	43,867,852	43,908,633	0.1%
BOSTON	52,312,068	56,658,743	8.3%	ORLANDO	44,178,146	43,964,848	-0.5%
HARTFORD/SPRINGFIELD	35,398,023	37,943,208	7.2%	SOUTH CAROLINA	76,027,397	75,536,005	-0.6%
NEW ENGLAND	38,415,583	40,807,550	6.2%	CHARLOTTE	42,082,218	41,788,343	-0.7%
LOS ANGELES	164,341,238	173,944,093	5.8%	CHICAGO	89,031,773	88,265,529	-0.9%
PITTSBURGH	26,718,488	28,233,968	5.7%	RICHMOND/NORFOLK	42,986,235	42,590,211	-0.9%
COLUMBUS	25,620,753	26,937,445	5.1%	SACRAMENTO	28,168,626	27,903,629	-0.9%
DENVER	41,429,259	43,548,806	5.1%	SAN FRANCISCO	37,151,465	36,680,522	-1.3%
PHILADELPHIA	67,128,869	70,520,277	5.1%	ATLANTA	65,312,795	64,358,216	-1.5%
BUFFALO/ROCHESTER	30,246,195	31,745,676	5.0%	RALEIGH/GREENSBORO	50,872,933	49,804,290	-2.1%
ROANOKE	30,962,017	32,282,946	4.3%	JACKSONVILLE	22,220,768	21,739,610	-2.2%
TOLEDO	19,444,187	20,177,668	3.8%	BALTIMORE/WASHINGTON	100,425,892	97,715,326	-2.7%
SYRACUSE	14,218,894	14,723,031	3.5%	SPOKANE	6,575,523	6,372,629	-3.1%
ALBANY	13,906,710	14,382,036	3.4%	NEW ORLEANS/MOBILE	34,973,546	33,881,085	-3.1%
MIAMI/FT. LAUDERDALE	60,398,704	62,441,283	3.4%	WICHITA	10,615,282	10,194,545	-4.0%
CINCINNATI/DAYTON	35,269,737	36,403,320	3.2%	PORTLAND	33,654,162	32,282,129	-4.1%
GRAND RAPIDS	22,264,564	22,906,447	2.9%	WEST TEX/NEW MEXICO	48,574,358	46,552,091	-4.2%
BIRMINGHAM/MONTGOMERY	44,559,622	45,783,767	2.7%	DALLAS/FT. WORTH	98,188,797	92,854,973	-5.4%
NASHVILLE	26,859,315	27,469,542	2.3%	HOUSTON	72,745,585	67,444,045	-7.3%
SAN DIEGO	29,092,393	29,707,548	2.1%	SEATTLE	33,703,132	30,561,442	-9.3%



# Scanner Data Markets — Whole

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

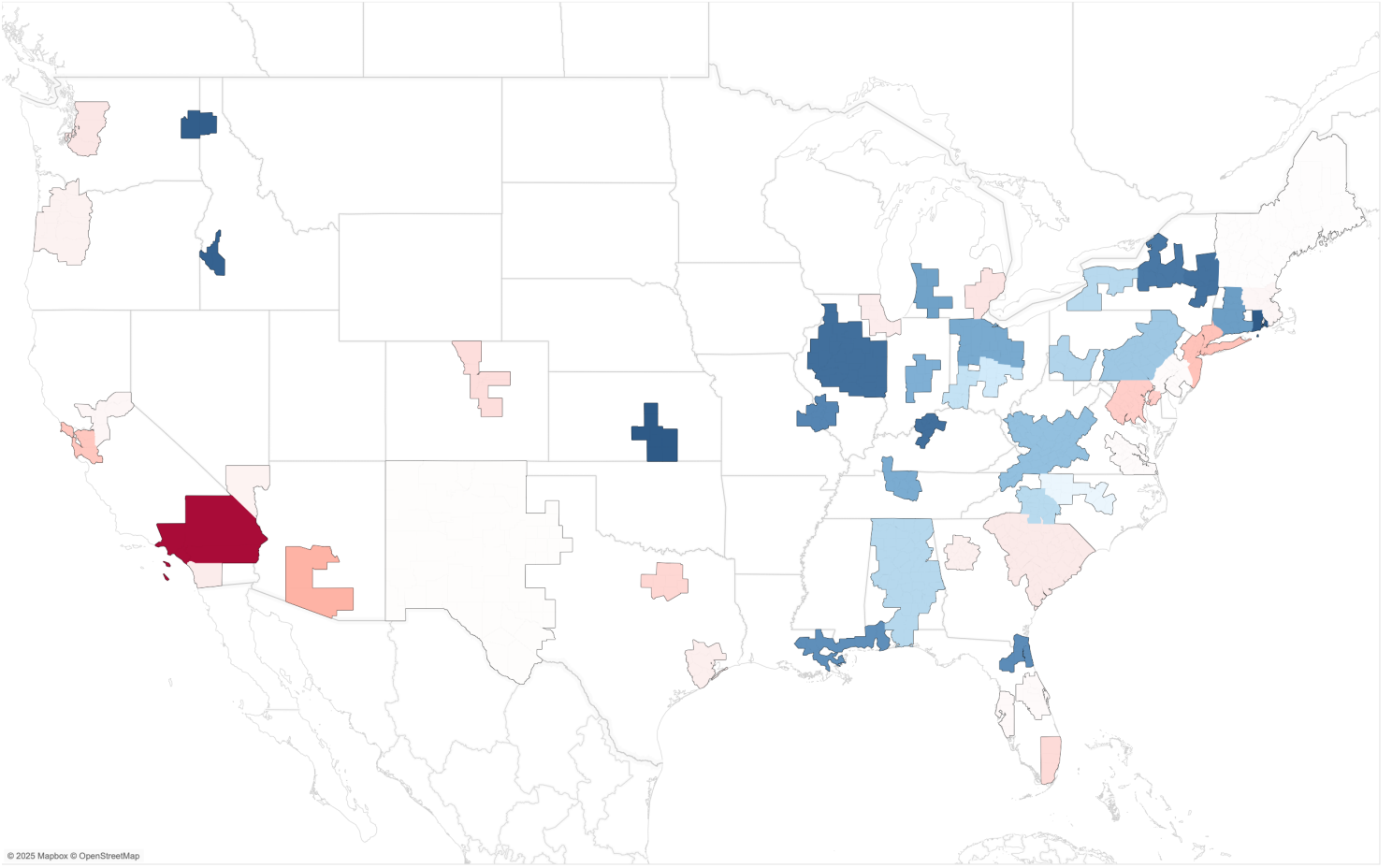


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Largest % Increase	Prior #	Current #	% Change	Rest of Markets	Prior #	Current #	% Change
PROVIDENCE	5,841,010	7,452,812	27.6%	DENVER	31,146,768	32,046,310	2.9%
BOSTON	28,556,151	34,779,572	21.8%	BIRMINGHAM/MONTGOMER	33,405,288	34,261,547	2.6%
NEW YORK	119,326,223	139,960,333	17.3%	NASHVILLE	21,211,609	21,644,519	2.0%
NEW ENGLAND	24,060,559	27,887,599	15.9%	CHICAGO	69,217,401	70,626,934	2.0%
ST. LOUIS	22,318,270	25,705,071	15.2%	SAN FRANCISCO	22,062,296	22,502,493	2.0%
HARTFORD/SPRINGFIELD	26,434,388	29,863,128	13.0%	INDIANAPOLIS	24,100,019	24,540,959	1.8%
LOUISVILLE	12,902,560	14,566,031	12.9%	HARRISBURG/SCRANTON	39,612,054	39,809,228	0.5%
DETROIT	38,369,099	42,499,513	10.8%	CHARLOTTE	34,262,328	34,332,495	0.2%
BOISE	4,044,396	4,475,095	10.6%	ORLANDO	29,418,486	29,293,719	-0.4%
LOS ANGELES	107,304,068	117,487,836	9.5%	SACRAMENTO	21,795,278	21,624,301	-0.8%
PHOENIX/TUCSON	53,083,183	58,056,201	9.4%	BALTIMORE/WASHINGTON	76,464,253	75,640,848	-1.1%
PHILADELPHIA	53,121,493	57,060,495	7.4%	RICHMOND/NORFOLK	34,109,379	33,675,822	-1.3%
SAN DIEGO	17,024,679	18,125,916	6.5%	SOUTH CAROLINA	59,863,345	59,041,758	-1.4%
CINCINNATI/DAYTON	28,423,607	30,188,313	6.2%	SPOKANE	4,526,431	4,452,868	-1.6%
COLUMBUS	20,223,722	21,431,198	6.0%	RALEIGH/GREENSBORO	41,887,530	41,160,255	-1.7%
ALBANY	10,988,259	11,617,785	5.7%	JACKSONVILLE	14,981,211	14,706,167	-1.8%
GRAND RAPIDS	18,685,166	19,684,675	5.3%	TAMPA	27,749,794	27,183,287	-2.0%
BUFFALO/ROCHESTER	24,082,691	25,333,206	5.2%	NEW ORLEANS/MOBILE	28,464,135	27,720,153	-2.6%
MIAMI/FT. LAUDERDALE	35,298,371	37,125,763	5.2%	WEST TEX/NEW MEXICO	38,618,402	37,374,535	-3.2%
SYRACUSE	11,544,147	12,133,587	5.1%	ATLANTA	47,143,620	45,415,271	-3.7%
PITTSBURGH	21,707,977	22,758,050	4.8%	PORTLAND	23,486,566	22,342,374	-4.9%
LAS VEGAS	17,387,821	18,222,796	4.8%	WICHITA	9,513,022	9,035,997	-5.0%
PEORIA/SPRINGFIELD	13,841,783	14,469,285	4.5%	DALLAS/FT. WORTH	77,471,423	71,750,523	-7.4%
ROANOKE	26,059,569	27,085,962	3.9%	HOUSTON	58,312,419	52,801,083	-9.5%
TOLEDO	16,414,621	16,929,932	3.1%	SEATTLE	21,156,117	18,824,917	-11.0%

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



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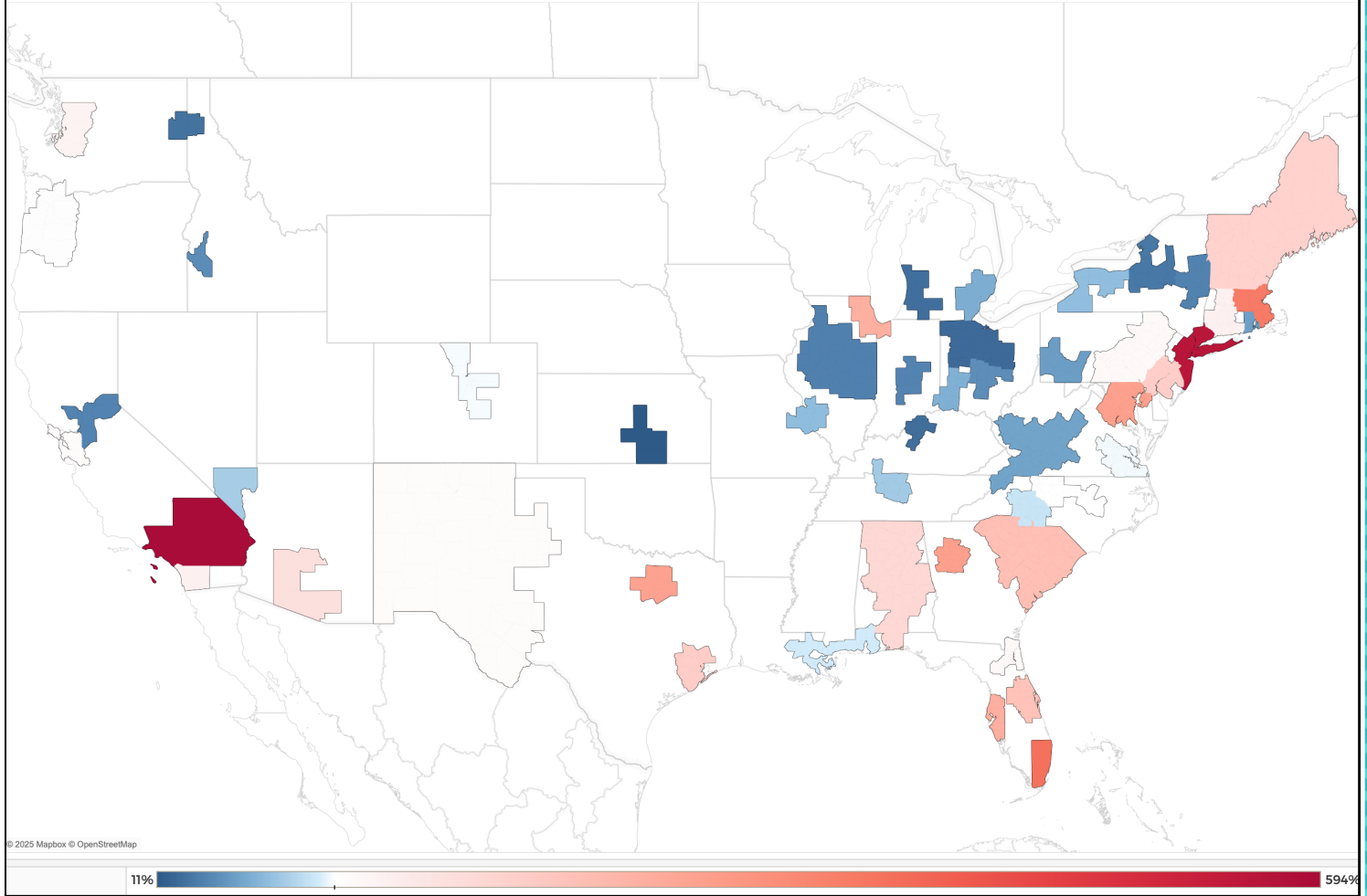
16%

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Largest % Increase				Rest of Markets			
Market	Prior #	Current #	% Change	Market	Prior #	Current #	% Change
HARRISBURG/SCRANTON	2,175,333	2,827,546	30.0%	RALEIGH/GREENSBORO	3,960,676	3,719,917	-6.1%
DENVER	5,616,467	6,741,670	20.0%	SYRACUSE	1,323,614	1,231,110	-7.0%
PITTSBURGH	2,698,193	3,098,113	14.8%	TAMPA	4,666,913	4,327,979	-7.3%
WICHITA	537,138	611,121	13.8%	BALTIMORE/WASHINGTON	9,018,408	8,338,177	-7.5%
ROANOKE	2,437,102	2,662,931	9.3%	GRAND RAPIDS	2,274,989	2,083,952	-8.4%
PHILADELPHIA	3,803,572	4,147,949	9.1%	MIAMI/FT. LAUDERDALE	7,705,341	7,056,409	-8.4%
TOLEDO	2,075,329	2,238,660	7.9%	BOISE	860,001	780,355	-9.3%
SEATTLE	5,470,615	5,863,809	7.2%	WEST TEX/NEW MEXICO	4,483,315	4,029,032	-10.1%
SPOKANE	641,660	686,487	7.0%	LOUISVILLE	1,198,114	1,071,534	-10.6%
BUFFALO/ROCHESTER	2,988,506	3,188,125	6.7%	BOSTON	5,106,076	4,553,929	-10.8%
RICHMOND/NORFOLK	3,922,042	4,178,181	6.5%	SAN FRANCISCO	10,301,179	9,047,775	-12.2%
HOUSTON	4,932,052	5,242,752	6.3%	CHICAGO	6,172,859	5,347,186	-13.4%
PORTLAND	4,716,804	4,974,408	5.5%	ORLANDO	4,907,073	4,238,840	-13.6%
SOUTH CAROLINA	5,459,629	5,639,500	3.3%	ALBANY	1,303,417	1,111,598	-14.7%
COLUMBUS	3,447,090	3,540,245	2.7%	INDIANAPOLIS	2,751,256	2,336,878	-15.1%
ATLANTA	4,999,592	5,122,110	2.5%	CINCINNATI/DAYTON	3,991,311	3,361,437	-15.8%
SACRAMENTO	4,682,573	4,597,369	-1.8%	NEW YORK	11,260,160	9,436,290	-16.2%
NASHVILLE	2,330,529	2,272,585	-2.5%	JACKSONVILLE	2,047,394	1,658,364	-19.0%
SAN DIEGO	5,630,628	5,484,724	-2.6%	NEW ORLEANS/MOBILE	2,133,328	1,724,836	-19.1%
DETROIT	6,228,447	6,056,442	-2.8%	PROVIDENCE	773,851	624,720	-19.3%
CHARLOTTE	3,303,295	3,193,244	-3.3%	HARTFORD/SPRINGFIELD	2,487,327	2,006,307	-19.3%
BIRMINGHAM/MONTGOMERY	3,285,492	3,165,094	-3.7%	PEORIA/SPRINGFIELD	1,317,617	1,048,393	-20.4%
LAS VEGAS	5,096,818	4,876,589	-4.3%	PHOENIX/TUCSON	14,251,924	10,987,153	-22.9%
DALLAS/FT. WORTH	7,874,098	7,497,117	-4.8%	NEW ENGLAND	5,225,725	3,993,999	-23.6%
LOS ANGELES	29,292,259	27,690,053	-5.5%	ST. LOUIS	2,541,813	1,507,486	-40.7%



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



Largest % Increase				Rest of Markets			
	Prior #	Current #	% Change		Prior #	Current #	% Change
BOISE	1,536,143	1,948,153	26.8%	SYRACUSE	1,351,133	1,358,334	0.5%
INDIANAPOLIS	1,469,702	1,682,147	14.5%	CINCINNATI/DAYTON	2,854,819	2,853,571	0.0%
LOUISVILLE	1,008,475	1,131,223	12.2%	SACRAMENTO	1,690,776	1,681,959	-0.5%
TAMPA	11,451,146	12,397,367	8.3%	HOUSTON	9,501,114	9,400,210	-1.1%
DETROIT	2,589,282	2,791,056	7.8%	RALEIGH/GREENSBORO	5,024,727	4,924,118	-2.0%
SAN FRANCISCO	4,787,990	5,130,254	7.1%	NEW ENGLAND	9,129,298	8,925,952	-2.2%
NASHVILLE	3,317,177	3,552,438	7.1%	WICHITA	565,122	547,427	-3.1%
BIRMINGHAM/MONTGOMERY	7,868,843	8,357,126	6.2%	PROVIDENCE	2,535,642	2,440,436	-3.8%
DALLAS/FT. WORTH	12,843,277	13,607,333	5.9%	RICHMOND/NORFOLK	4,954,814	4,736,208	-4.4%
ORLANDO	9,852,587	10,432,289	5.9%	SAN DIEGO	6,437,086	6,096,909	-5.3%
TOLEDO	954,238	1,009,077	5.7%	CHARLOTTE	4,516,595	4,262,604	-5.6%
MIAMI/FT. LAUDERDALE	17,394,992	18,259,112	5.0%	WEST TEX/NEW MEXICO	5,472,642	5,148,524	-5.9%
ATLANTA	13,169,583	13,820,835	4.9%	HARTFORD/SPRINGFIELD	6,476,309	6,073,773	-6.2%
ST. LOUIS	3,071,891	3,188,580	3.8%	PEORIA/SPRINGFIELD	1,706,130	1,590,320	-6.8%
LOS ANGELES	27,744,911	28,766,203	3.7%	BOSTON	18,649,841	17,325,242	-7.1%
JACKSONVILLE	5,192,163	5,375,078	3.5%	BALTIMORE/WASHINGTON	14,943,231	13,736,301	-8.1%
PITTSBURGH	2,312,319	2,377,805	2.8%	PHILADELPHIA	10,203,805	9,311,833	-8.7%
ROANOKE	2,465,347	2,534,053	2.8%	PORTLAND	5,450,792	4,965,347	-8.9%
HARRISBURG/SCRANTON	5,213,330	5,349,241	2.6%	NEW YORK	30,179,960	27,201,721	-9.9%
ALBANY	1,615,034	1,652,653	2.3%	CHICAGO	13,641,513	12,291,410	-9.9%
DENVER	4,666,024	4,760,826	2.0%	LAS VEGAS	4,086,389	3,641,631	-10.9%
BUFFALO/ROCHESTER	3,174,998	3,224,344	1.6%	SPOKANE	1,407,432	1,233,275	-12.4%
SOUTH CAROLINA	10,704,422	10,854,748	1.4%	GRAND RAPIDS	1,304,409	1,137,820	-12.8%
NEW ORLEANS/MOBILE	4,376,083	4,436,096	1.4%	PHOENIX/TUCSON	8,742,603	7,542,813	-13.7%
COLUMBUS	1,949,942	1,966,003	0.8%	SEATTLE	7,076,400	5,872,716	-17.0%