

# Watermelon Market Report

Compiled by the National Watermelon Promotion Board



## Market

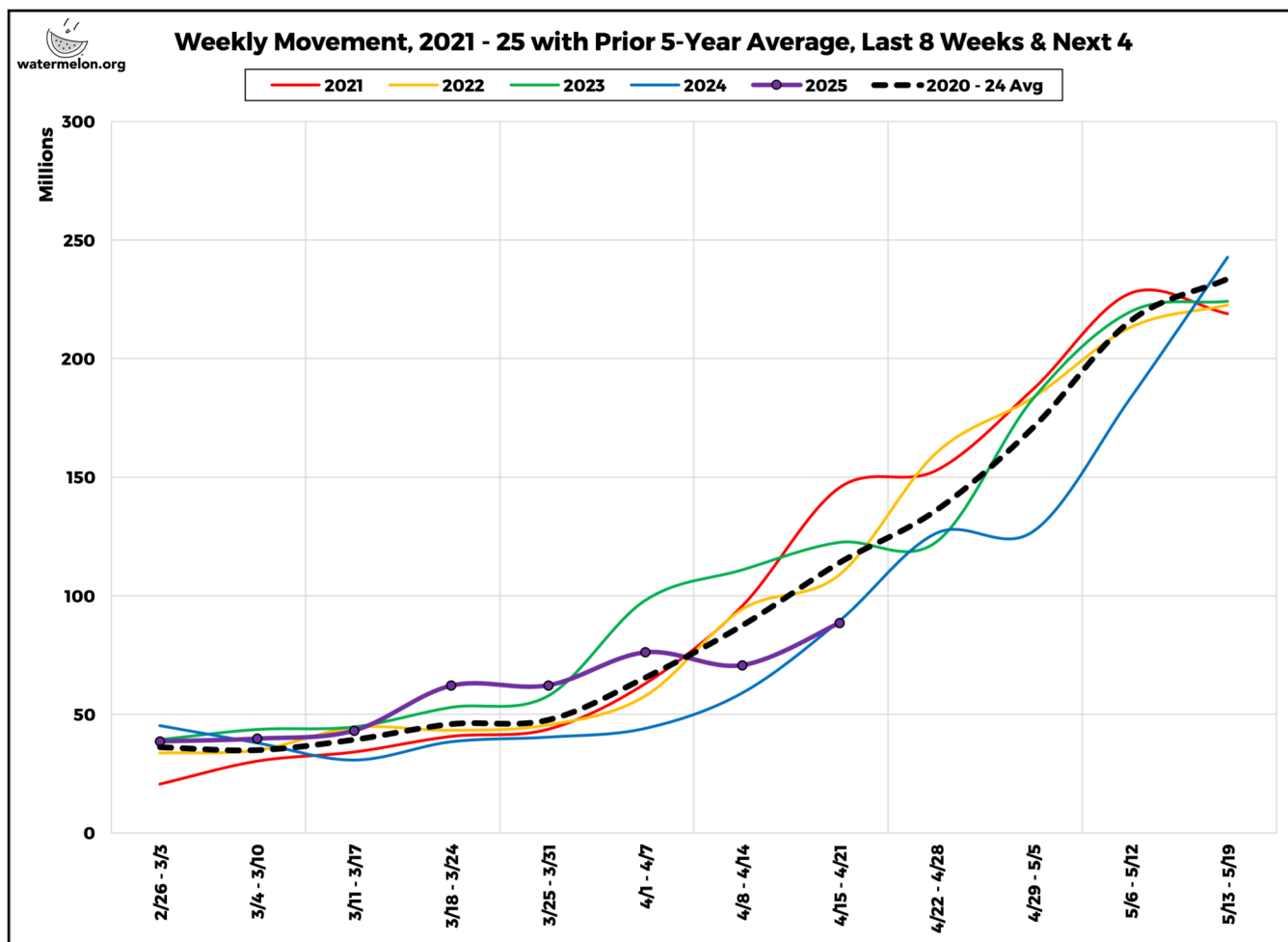
Data current through April 22, 2025

- Preliminary data shows volume past two weeks has been more like last year than 2023
- Weekly seedless FOB continued downward at similar pace, past week a hair above average

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	97,557,827	95,286,296	2.4%	119,513,908	-18.4%
Last 30 Days	328,711,355	252,500,226	30.2%	342,228,272	-3.9%
Year to Date	844,991,970	708,497,042	19.3%	763,336,358	10.7%

## Movement

- Continued adjustment to previous week, consider recent data as subject to change
- Past 30 days down a tick from average, past two weeks have glided into 2024 path



Source: AMS Market News Portal

To download NWPB's detailed Excel files visit:

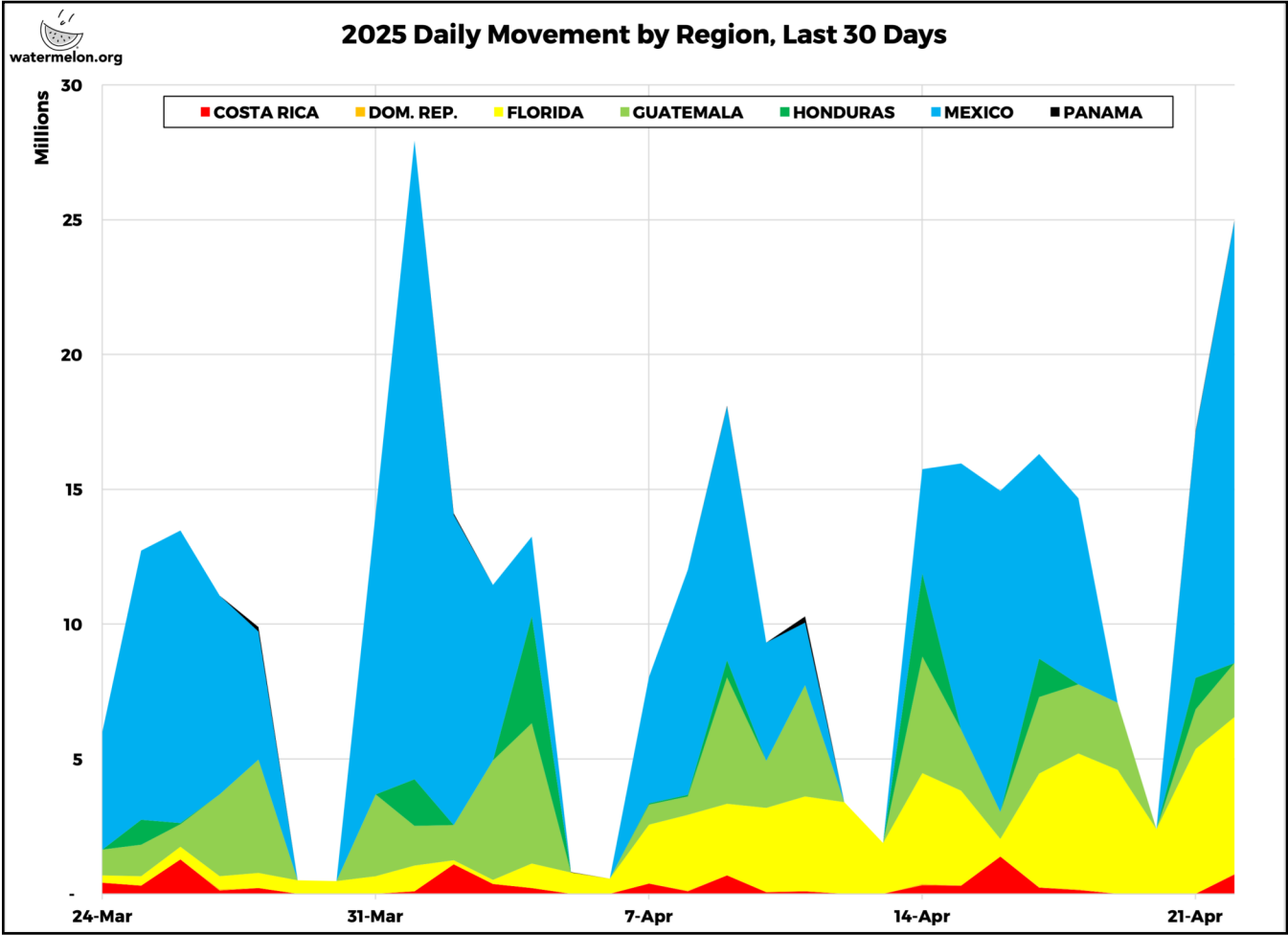
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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

## Source Regions—Last Week vs. Prior

- **Decreasing volume:** Guatemala, Honduras, Panama
- **Stable volume:**
- **Increasing volume:** Costa Rica, Dominican Republic, Florida, Mexico



## Last 7 Days Movement:

- Mexico 7% above 2024, 6% below average
- Florida 24% below 2024, 45% below average
- Guatemala 90% above 2024, well above average
- Honduras well above 2024, 57% below average
- Costa Rica 37% above 2024, well above average
- Dom. Rep. 2% below 2024, well above average
- Panama 54% below 2024, 84% below average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	51,916,427	48,334,210	7%	55,473,771	-6%
FLORIDA	28,080,475	37,109,600	-24%	51,481,360	-45%
GUATEMALA	12,366,096	6,523,561	90%	4,750,603	160%
HONDURAS	2,595,342	1,298,021	100%	6,073,117	-57%
COSTA RICA	2,450,305	1,788,848	37%	1,145,246	114%
DOM. REP.	80,806	82,434	-2%	28,109	187%
PANAMA	68,376	149,622	-54%	430,619	-84%
TEXAS	0	0	NA	131,082	-100%
BRAZIL	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
CALIFORNIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
Total	97,557,827	95,286,296	2.4%	119,513,908	-18.4%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	187,291,223	130,771,728	43%	177,693,427	5%
FLORIDA	62,547,995	60,004,000	4%	100,976,560	-38%
GUATEMALA	56,547,966	42,311,508	34%	33,710,063	68%
HONDURAS	13,078,952	9,953,736	31%	21,292,191	-39%
COSTA RICA	8,445,827	8,316,945	2%	5,847,633	44%
PANAMA	556,996	791,747	-30%	2,418,590	-77%
DOM. REP.	242,396	350,562	-31%	136,191	78%
TEXAS	0	0	NA	153,617	-100%
BRAZIL	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
CALIFORNIA	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
Total	328,711,355	252,500,226	30.2%	342,228,272	-3.9%

## Last 30 Days Movement:

- Mexico 43% above 2024, 5% above average
- Florida 4% above 2024, 38% below average
- Guatemala 34% above 2024, 68% above average
- Honduras 31% above 2024, 39% below average
- Costa Rica 2% above 2024, 44% above average
- Panama 30% below 2024, 77% below average
- Dom. Rep. 31% below 2024, 78% above average

## Year to Date Movement:

- Mexico 25% above 2024, 10% above average
- Guatemala 15% above 2024, 50% above average
- Florida 6% above 2024, 37% above average
- Honduras 9% above 2024, 19% below average
- Costa Rica 6% above 2024, 76% above average
- Brazil well above 2024, 98% above average
- Dom. Rep. 40% below 2024, 39% above average
- Panama 10% above 2024, 69% below average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	480,381,203	383,302,080	25%	435,490,703	10%
GUATEMALA	229,810,719	199,375,535	15%	153,102,263	50%
FLORIDA	63,309,595	60,004,000	6%	101,096,560	-37%
HONDURAS	45,539,103	41,722,358	9%	56,092,867	-19%
COSTA RICA	21,965,771	20,721,813	6%	12,487,735	76%
BRAZIL	1,898,875	627,694	203%	959,367	98%
DOM. REP.	1,119,478	1,860,998	-40%	803,320	39%
PANAMA	967,226	882,528	10%	3,149,918	-69%
TEXAS	0	0	NA	153,617	-100%
CANADA	0	36	-100%	7	-100%
GEORGIA	0	0	NA	0	NA
CALIFORNIA	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
Total	844,991,970	708,497,042	19.3%	763,336,358	10.7%



# Seedless FOB Pricing

- Prior years compacted tightly for most recent week
- Gradual decrease over several weeks stands in stark contrast to 2024, which stayed elevated then fell sharply

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.307	\$0.330	\$0.295
Last 30 Days	\$0.348	\$0.478	\$0.356
Year to Date	\$0.363	\$0.464	\$0.369

