

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

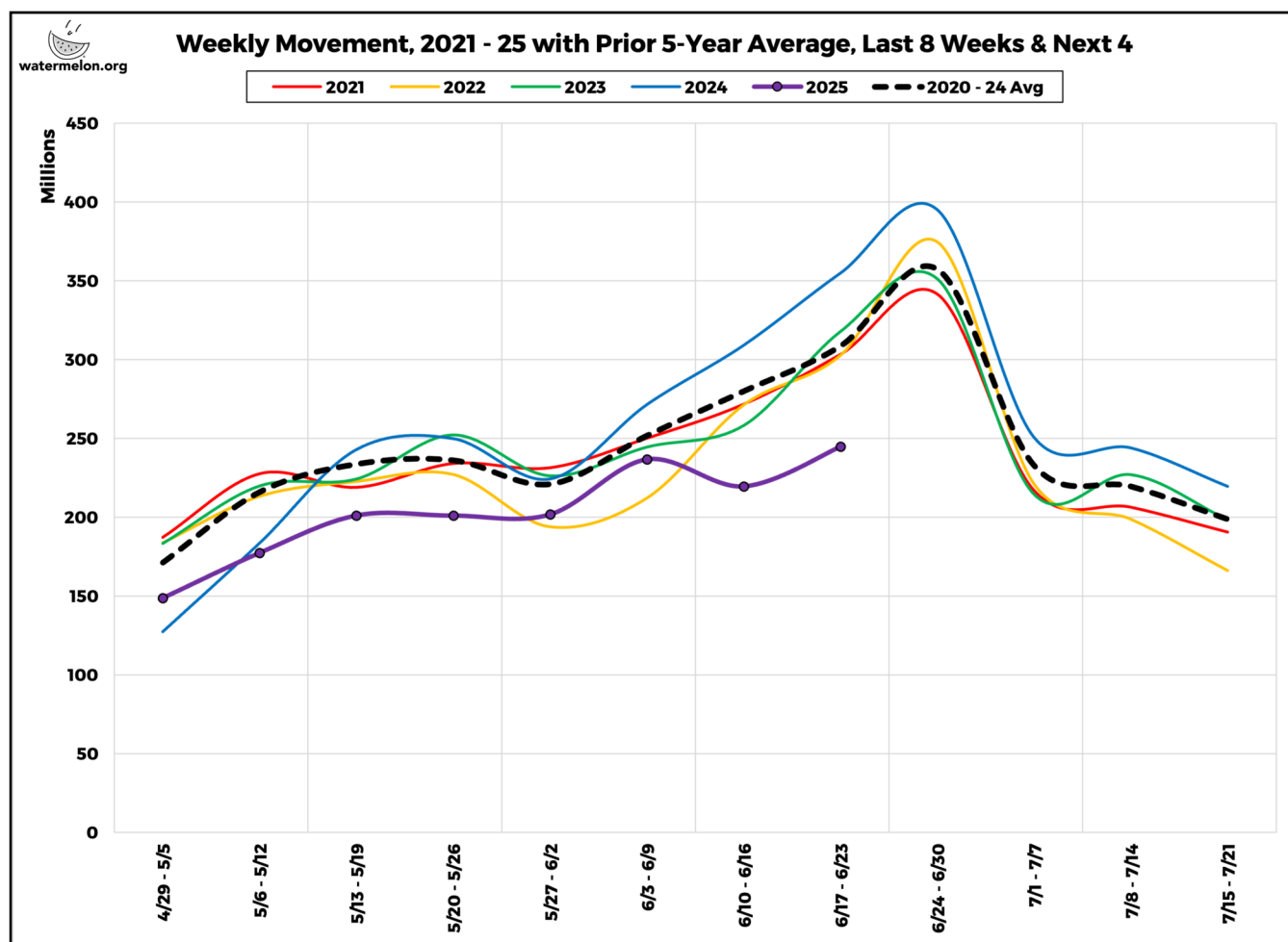
Data current through June 24, 2025

- USDA data indicates volume remains light and well behind average
- Weekly seedless FOB has not moved appreciably last three weeks, remains below average

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	260,206,196	364,174,027	-28.5%	319,165,952	-18.5%
Last 30 Days	962,660,552	1,242,811,075	-22.5%	1,150,433,957	-16.3%
Year to Date	2,611,743,273	2,842,363,509	-8.1%	2,853,948,266	-8.5%

Movement

- USDA data shows the ramp up to the 4th remains sluggish despite many areas reporting
- Last 30 days 187M pounds below average, 280M pounds behind last year



Source: AMS Market News Portal

To download NWPB's detailed Excel files visit:

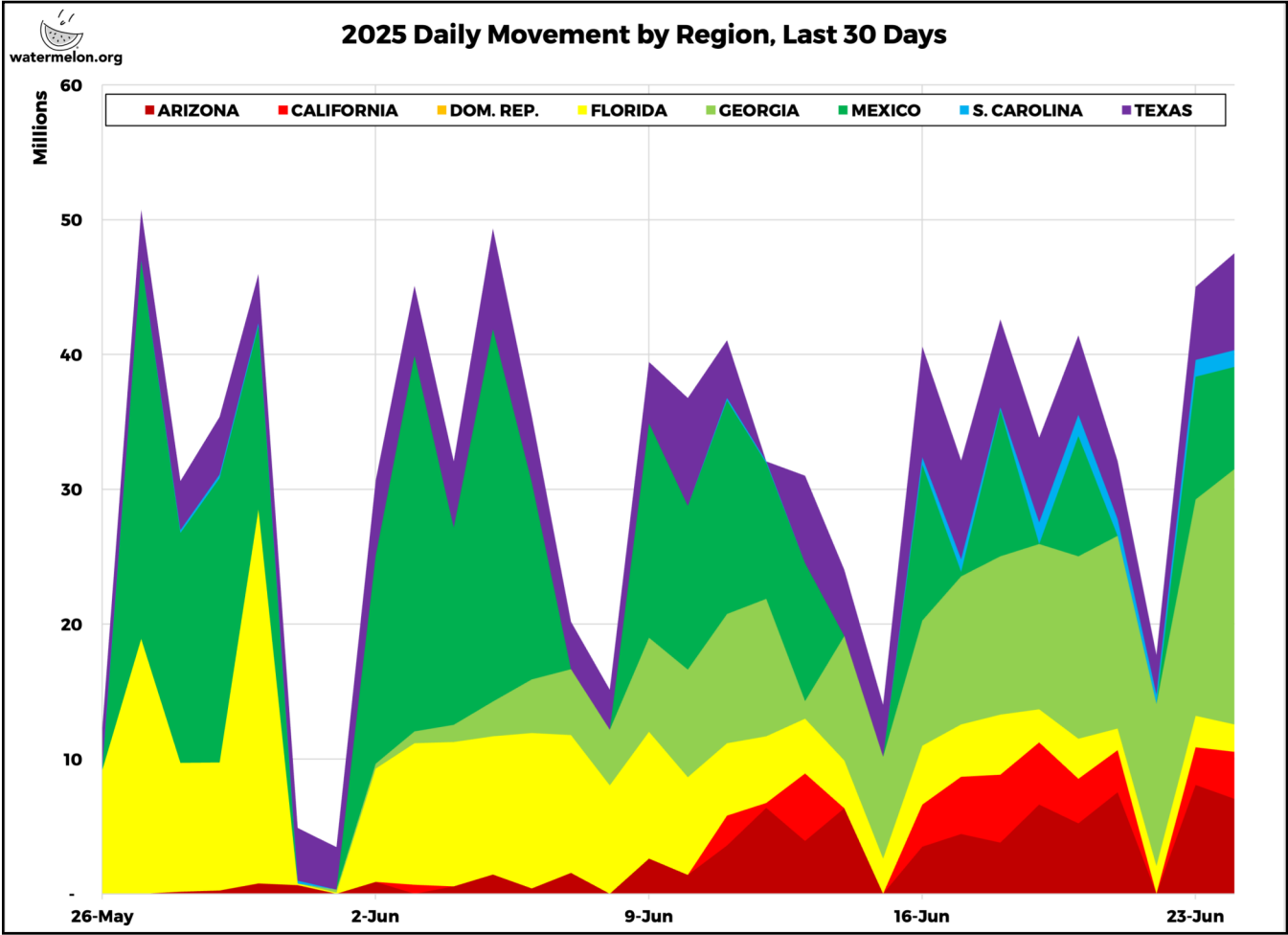
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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Source Regions—Last Week vs. Prior

- **Decreasing volume:** Florida, Mexico
- **Stable volume:** Texas
- **Increasing volume:** Arizona, California, Georgia, South Carolina



Last 7 Days Movement:

- Georgia 46% below 2024, 38% below average
- Texas well above 2024, 22% above average
- Arizona 18% below 2024, 21% below average
- Mexico 47% above 2024, 42% above average
- California 35% below 2024, 6% above average
- Florida 46% below 2024, 45% below average
- S. Carolina 61% below 2024, 47% below average
- Dom. Rep. 58% below 2024, 7% below average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
GEORGIA	98,869,775	184,160,000	-46%	159,320,400	-38%
TEXAS	38,580,000	19,088,150	102%	31,740,073	22%
ARIZONA	38,264,630	46,873,170	-18%	31,741,244	21%
MEXICO	36,459,168	24,825,253	47%	25,624,333	42%
CALIFORNIA	22,317,500	34,587,500	-35%	20,999,686	6%
FLORIDA	17,942,400	33,340,000	-46%	32,721,600	-45%
SOUTH CAROLINA	7,764,400	19,720,000	-61%	14,704,000	-47%
DOM. REP.	8,323	19,954	-58%	8,957	-7%
ALABAMA	0	0	NA	1,800,000	-100%
NORTH CAROLINA	0	1,360,000	-100%	320,000	-100%
MISSISSIPPI	0	0	NA	144,000	-100%
MISSOURI	0	200,000	-100%	40,000	-100%
COSTA RICA	0	0	NA	1,659	-100%
GUATEMALA	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
HONDURAS	0	0	NA	0	NA
BRAZIL	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
MICHIGAN	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
Total	260,206,196	364,174,027	-28.5%	319,165,952	-18.5%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
GEORGIA	187,463,925	304,136,000	-38%	262,993,340	-29%
MEXICO	154,775,395	139,646,628	11%	124,636,468	24%
TEXAS	105,060,000	62,695,600	68%	96,979,474	8%
FLORIDA	103,480,925	192,324,000	-46%	198,794,400	-48%
ARIZONA	73,759,385	105,470,600	-30%	74,974,035	-2%
CALIFORNIA	37,285,600	70,466,900	-47%	41,066,032	-9%
SOUTH CAROLINA	9,601,200	29,360,000	-67%	21,888,000	-56%
DOM. REP.	26,077	19,954	31%	21,957	19%
ALABAMA	0	0	NA	2,640,000	-100%
NORTH CAROLINA	0	1,360,000	-100%	320,000	-100%
MISSISSIPPI	0	0	NA	144,000	-100%
MISSOURI	0	200,000	-100%	40,000	-100%
COSTA RICA	0	0	NA	4,916	-100%
GUATEMALA	0	0	NA	0	NA
HONDURAS	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
BRAZIL	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
Total	671,452,507	905,679,682	-25.9%	824,502,623	-18.6%

Last 30 Days Movement:

- Georgia 38% below 2024, 29% below average
- Mexico 11% above 2024, 24% above average
- Texas 68% above 2024, 8% above average
- Florida 46% below 2024, 48% below average
- Arizona 30% below 2024, 2% below average
- California 47% below 2024, 9% below average
- S. Carolina 67% below 2024, 56% below average
- Dom. Rep. 31% above 2024, 19% above average

Year to Date Movement:

- Mexico 16% above 2024, 13% above average
- Florida 27% below 2024, 32% below average
- Guatemala 16% above 2024, 50% above average
- Georgia 38% below 2024, 28% below average
- Texas 2% above 2024, 15% below average
- Arizona 36% below 2024, 18% below average
- Honduras 13% above 2024, 29% below average
- California 46% below 2024, 23% below average
- Costa Rica 35% above 2024, well above average
- S. Carolina 65% below 2024, 52% below average
- Brazil well above 2024, 98% above average
- Dom. Rep. 39% below 2024, 40% above average
- Panama 18% below 2024, 68% below average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	1,158,595,654	997,584,852	16%	1,025,517,746	13%
FLORIDA	638,406,620	869,684,000	-27%	942,606,040	-32%
GUATEMALA	243,750,488	210,184,839	16%	162,962,443	50%
GEORGIA	190,174,325	305,136,000	-38%	265,355,660	-28%
TEXAS	167,648,000	164,384,250	2%	197,755,527	-15%
ARIZONA	76,986,645	119,491,347	-36%	94,046,463	-18%
HONDURAS	48,567,537	43,078,848	13%	68,043,799	-29%
CALIFORNIA	37,940,000	70,466,900	-46%	49,351,484	-23%
COSTA RICA	34,383,068	25,508,268	35%	16,924,125	103%
SOUTH CAROLINA	10,821,200	30,960,000	-65%	22,496,000	-52%
BRAZIL	1,898,875	627,694	203%	959,367	98%
DOM. REP.	1,330,791	2,176,708	-39%	953,023	40%
PANAMA	1,240,070	1,519,767	-18%	3,832,582	-68%
ALABAMA	0	0	NA	2,640,000	-100%
NORTH CAROLINA	0	1,360,000	-100%	320,000	-100%
MISSISSIPPI	0	0	NA	144,000	-100%
MISSOURI	0	200,000	-100%	40,000	-100%
CANADA	0	36	-100%	7	-100%
INDIANA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
Total	2,611,743,273	2,842,363,509	-8.1%	2,853,948,266	-8.5%

Seedless FOB Pricing

- Little change past three weeks, remains below average
- Most recent days ranging between \$0.15 and \$0.20 per pound for most price points

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.174	\$0.218	\$0.229
Last 30 Days	\$0.177	\$0.220	\$0.231
Year to Date	\$0.258	\$0.291	\$0.268

