

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

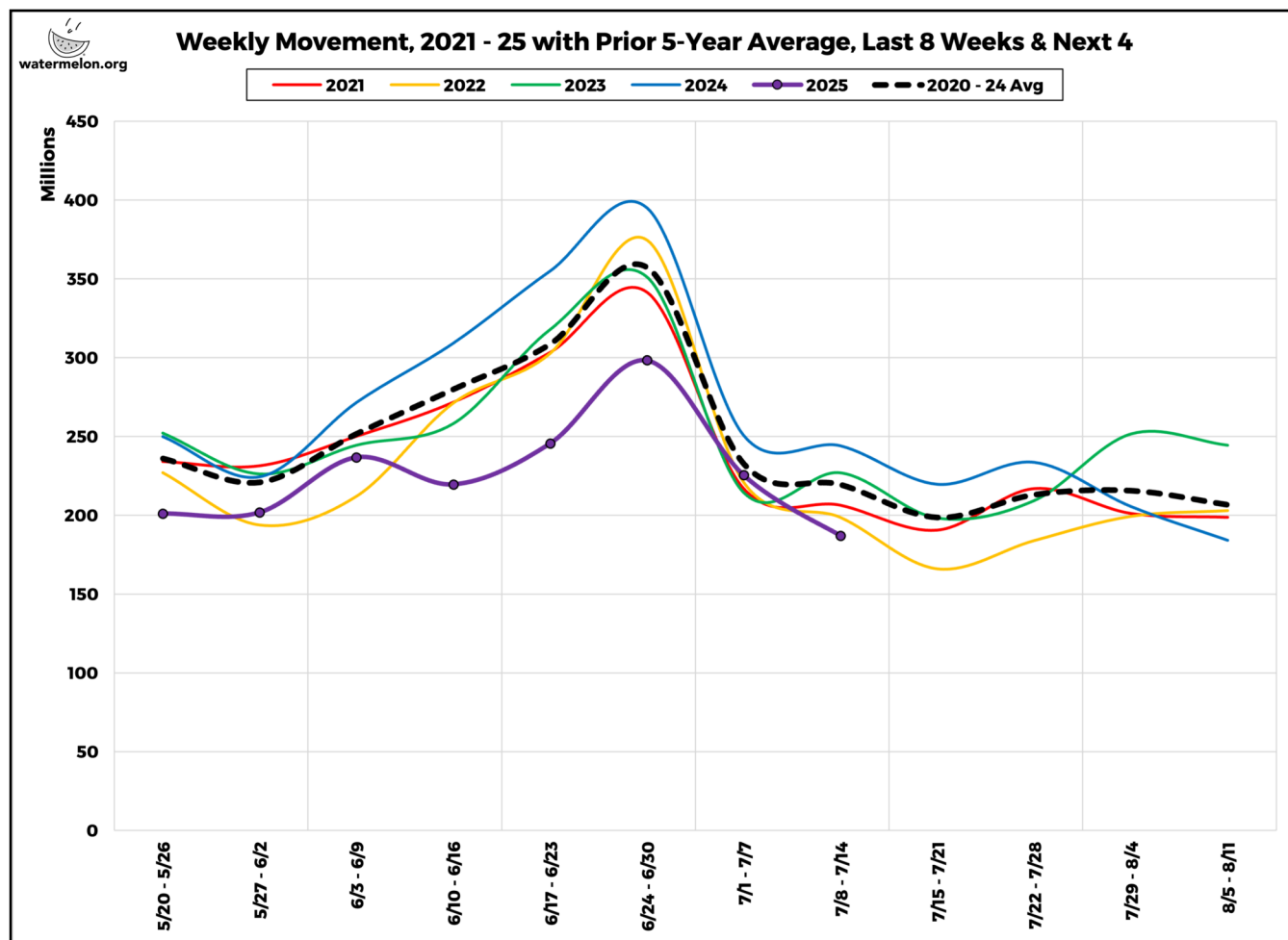
Data current through July 15, 2025

- USDA data indicates volume was again lower than recent years this past week
- Weekly seedless FOB ticked up more noticeably, though remains below average

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	182,945,833	238,192,558	-23.2%	217,754,792	-16.0%
Last 30 Days	1,025,696,881	1,303,069,271	-21.3%	1,192,677,461	-14.0%
Year to Date	3,304,515,552	3,701,880,199	-10.7%	3,638,067,556	-9.2%

Movement

- Last 30 days have shown lowest volume since 2012
- Most recent week not far off from 2021 & '22, bigger jump to past couple of years



Source: AMS Market News Portal

To download NWPB's detailed Excel files visit:

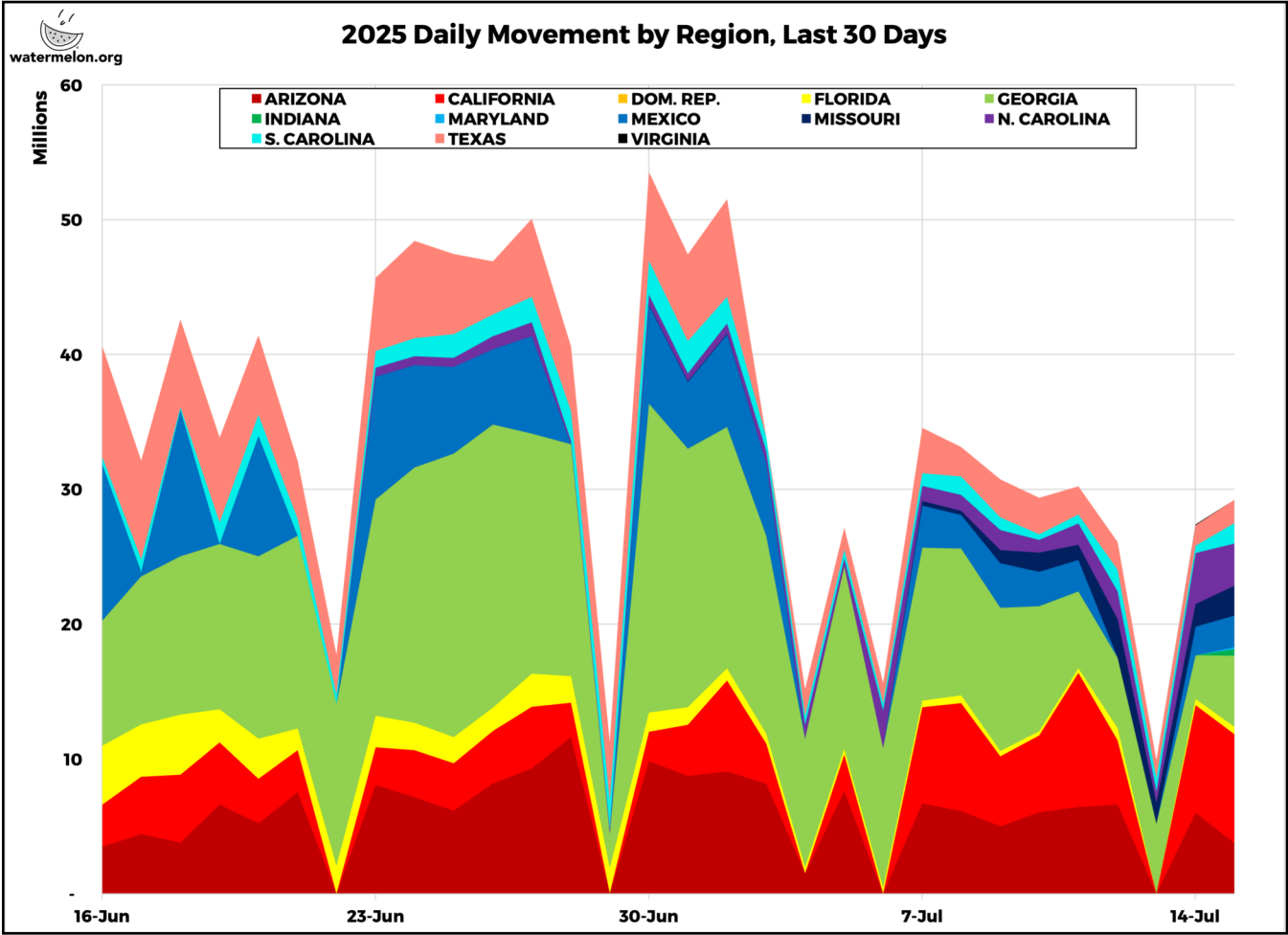
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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

Source Regions—Last Week vs. Prior

- **Decreasing volume:** Florida, Georgia, Mexico, Texas
- **Stable volume:** Arizona, South Carolina
- **Increasing volume:** California, Indiana, Maryland, Missouri, North Carolina, Virginia



Last 7 Days Movement:

- Georgia 9% above 2024, 29% below average
- California 13% below 2024, 15% above average
- Arizona 73% above 2024, well above average
- Texas 31% above 2024, 22% below average
- N. Carolina 48% below 2024, 3% below average
- Mexico 57% below 2024, 26% below average
- Missouri 53% below 2024, 46% below average
- S. Carolina 26% below 2024, 62% below average
- Florida 55% below 2024, 8% above average
- Indiana 98% below 2024, 96% below average
- Maryland 52% below 2024, 20% below average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
GEORGIA	44,568,725	40,820,000	9%	62,443,200	-29%
CALIFORNIA	41,675,000	47,696,700	-13%	36,082,987	15%
ARIZONA	33,863,705	19,604,425	73%	12,095,634	180%
TEXAS	14,240,000	10,865,300	31%	18,321,552	-22%
NORTH CAROLINA	13,833,075	26,725,000	-48%	14,223,000	-3%
MEXICO	12,634,257	29,479,140	-57%	16,999,258	-26%
MISSOURI	11,778,775	25,214,400	-53%	21,854,880	-46%
SOUTH CAROLINA	6,742,400	9,140,000	-26%	17,744,000	-62%
FLORIDA	2,934,400	6,480,000	-55%	2,720,000	8%
INDIANA	483,400	19,376,000	-98%	13,280,000	-96%
MARYLAND	134,400	280,000	-52%	168,000	-20%
VIRGINIA	44,800	0	NA	0	NA
DOM. REP.	12,896	71,593	-82%	34,790	-63%
ALABAMA	0	0	NA	960,000	-100%
MICHIGAN	0	1,800,000	-100%	360,000	-100%
MISSISSIPPI	0	0	NA	336,000	-100%
DELAWARE	0	640,000	-100%	128,000	-100%
COSTA RICA	0	0	NA	3,491	-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
Total	182,945,833	238,192,558	-23.2%	217,754,792	-16.0%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
GEORGIA	233,415,950	295,600,000	-21%	320,676,200	-27%
ARIZONA	120,735,340	78,524,545	54%	53,328,476	126%
CALIFORNIA	86,270,000	117,291,325	-26%	89,282,119	-3%
TEXAS	64,050,000	41,353,375	55%	64,322,976	0%
MEXICO	55,534,221	83,188,651	-33%	51,707,957	7%
SOUTH CAROLINA	26,635,200	47,180,000	-44%	56,880,000	-53%
NORTH CAROLINA	26,126,275	43,927,000	-41%	20,543,400	27%
FLORIDA	17,718,400	26,880,000	-34%	22,072,000	-20%
MISSOURI	12,562,775	35,614,400	-65%	29,690,080	-58%
INDIANA	483,400	23,176,000	-98%	16,344,000	-97%
MARYLAND	134,400	280,000	-52%	168,000	-20%
VIRGINIA	44,800	0	NA	0	NA
DOM. REP.	34,617	172,122	-80%	65,455	-47%
ALABAMA	0	0	NA	5,384,000	-100%
MISSISSIPPI	0	0	NA	1,896,000	-100%
MICHIGAN	0	1,840,000	-100%	368,000	-100%
DELAWARE	0	640,000	-100%	128,000	-100%
COSTA RICA	0	0	NA	7,818	-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
OKLAHOMA	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
Total	643,745,378	795,667,418	-19.1%	732,864,480	-12.2%

Last 30 Days Movement:

- Georgia 21% below 2024, 27% below average
- Arizona 54% above 2024, well above average
- California 26% below 2024, 3% below average
- Texas 55% above 2024, even with average
- Mexico 33% below 2024, 7% above average
- S. Carolina 44% below 2024, 53% below average
- N. Carolina 41% below 2024, 27% above average
- Florida 34% below 2024, 20% below average
- Missouri 65% below 2024, 58% below average

Year to Date Movement:

- Mexico 12% above 2024, 13% above average
- Florida 27% below 2024, 32% below average
- Georgia 30% below 2024, 28% below average
- Guatemala 16% above 2024, 50% above average
- Texas 14% above 2024, 11% below average
- Arizona even with 2024, 34% above average
- California 34% below 2024, 10% below average
- Honduras 13% above 2024, 29% below average
- S. Carolina 52% below 2024 and average
- Costa Rica 35% above 2024, well above average
- N. Carolina 38% below 2024, 34% above average
- Missouri 65% below 2024, 58% below average
- Brazil well above 2024, 98% above average
- Dom. Rep. 41% below 2024, 35% above average
- Panama 18% below 2024, 68% below average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	1,220,559,602	1,088,277,695	12%	1,079,896,082	13%
FLORIDA	658,073,820	901,164,000	-27%	968,041,240	-32%
GEORGIA	444,613,025	631,188,000	-30%	614,503,060	-28%
GUATEMALA	243,750,488	210,184,839	16%	162,962,443	50%
TEXAS	237,650,000	209,133,750	14%	266,505,103	-11%
ARIZONA	203,980,300	204,762,497	0%	152,032,600	34%
CALIFORNIA	127,740,000	194,228,575	-34%	142,343,373	-10%
HONDURAS	48,567,537	43,078,848	13%	68,043,799	-29%
SOUTH CAROLINA	39,315,600	82,340,000	-52%	82,752,000	-52%
COSTA RICA	34,383,068	25,508,268	35%	16,931,942	103%
NORTH CAROLINA	28,142,275	45,727,000	-38%	20,983,400	34%
MISSOURI	12,562,775	35,854,400	-65%	29,738,080	-58%
BRAZIL	1,898,875	627,694	203%	959,367	98%
DOM. REP.	1,375,517	2,348,830	-41%	1,018,478	35%
PANAMA	1,240,070	1,519,767	-18%	3,832,582	-68%
INDIANA	483,400	23,176,000	-98%	16,344,000	-97%
MARYLAND	134,400	280,000	-52%	168,000	-20%
VIRGINIA	44,800	0	NA	0	NA
ALABAMA	0	0	NA	8,396,000	-100%
MISSISSIPPI	0	0	NA	2,120,000	-100%
MICHIGAN	0	1,840,000	-100%	368,000	-100%
DELAWARE	0	640,000	-100%	128,000	-100%
CANADA	0	36	-100%	7	-100%
OKLAHOMA	0	0	NA	0	NA
Total	3,304,515,552	3,701,880,199	-10.7%	3,638,067,556	-9.2%

Seedless FOB Pricing

- Most reporting regions pushing higher, though AZ/CA is diverging downward
- Non-AZ/CA price points ranging between \$0.18 & \$0.20

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.186	\$0.209	\$0.221
Last 30 Days	\$0.177	\$0.216	\$0.225
Year to Date	\$0.241	\$0.273	\$0.258

