

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

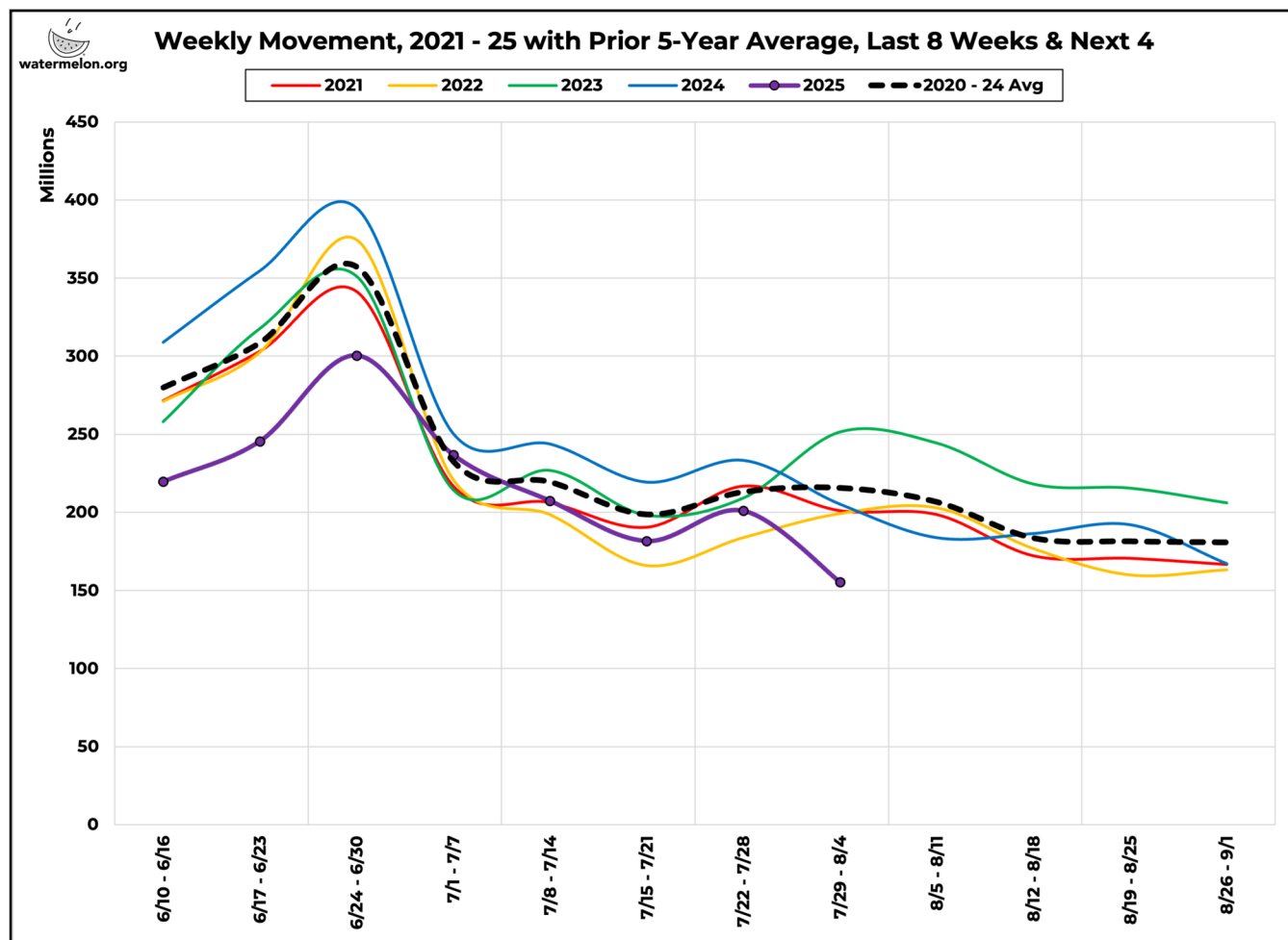
Data current through August 5, 2025

- Preliminary USDA data indicates past week volume heavily departed from average
- Weekly seedless FOB turned down slightly from last week's high water mark

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	158,994,699	209,768,169	-24.2%	216,006,661	-26.4%
Last 30 Days	809,635,224	956,037,698	-15.3%	909,844,019	-11.0%
Year to Date	3,874,291,368	4,362,528,611	-11.2%	4,266,625,670	-9.2%

Movement

- Monthlong run of relatively normal movement fell heavily in past week
- 15 different areas reported production in the past seven days



Source: AMS Market News Portal

To download NWPB's detailed Excel files visit:

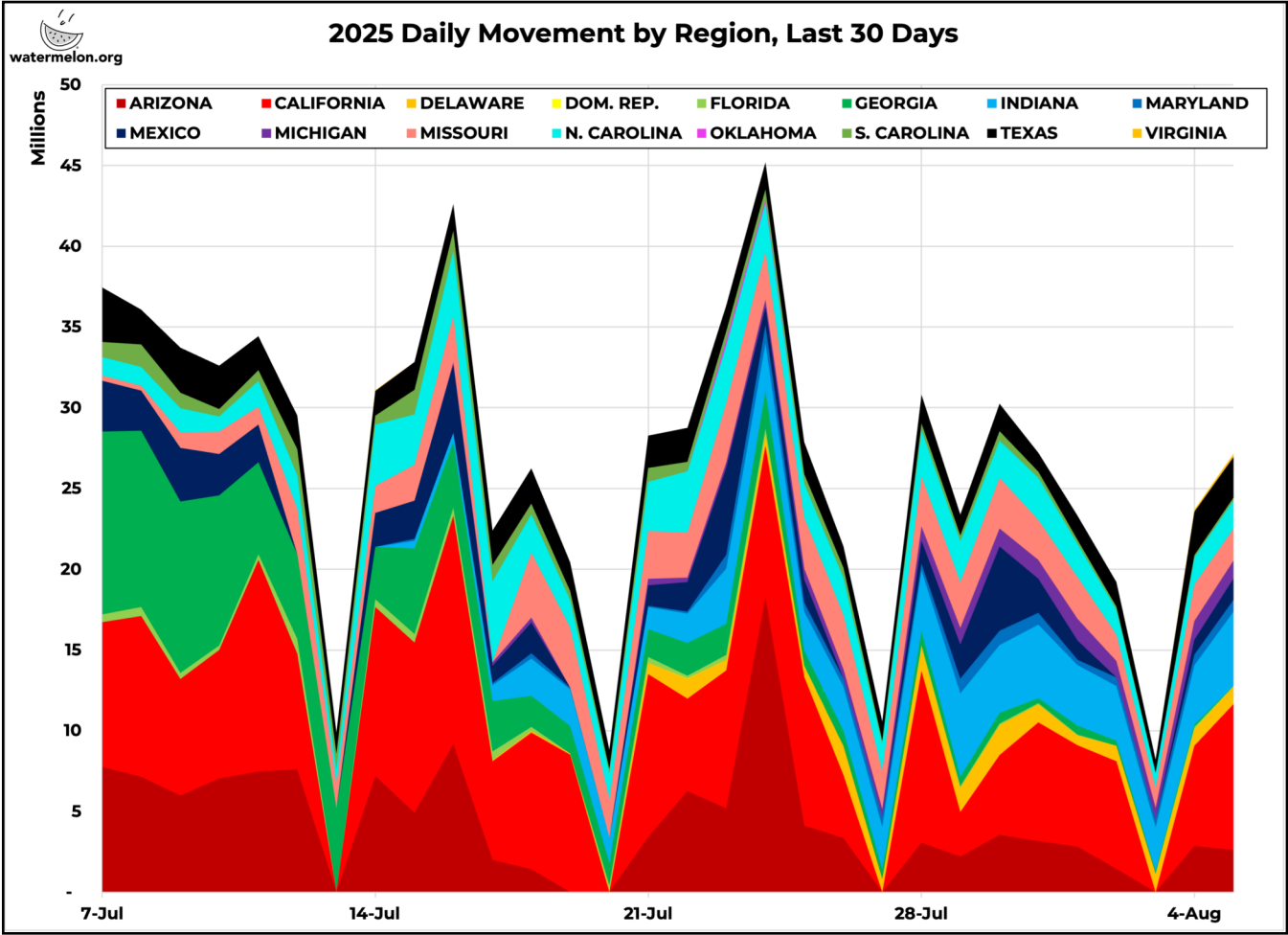
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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Source Regions—Last Week vs. Prior

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



Last 7 Days Movement:

- California 95% above 2024, 20% above average
- Indiana 61% below 2024, 51% below average
- Arizona 82% above 2024 well above average
- Missouri 4% below 2024, 33% below average
- N. Carolina 50% below 2024, 61% below average
- Texas 56% above 2024, 2% even with average
- Mexico 14% below 2024, 5% below average
- Delaware 68% below 2024, 63% below average
- Michigan 7% above 2024, 31% above average
- Maryland 63% below 2024, 66% below average
- Georgia 24% below 2024, 37% below average
- S. Carolina 27% below 2024, 13% below average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
CALIFORNIA	40,460,200	20,758,450	95%	33,627,020	20%
INDIANA	26,899,475	68,800,000	-61%	54,979,200	-51%
ARIZONA	16,490,000	9,054,500	82%	2,100,365	685%
MISSOURI	15,344,000	16,064,000	-4%	22,894,000	-33%
NORTH CAROLINA	12,867,000	25,700,000	-50%	33,254,400	-61%
TEXAS	11,840,000	7,600,000	56%	11,825,600	0%
MEXICO	10,701,394	12,408,664	-14%	11,282,845	-5%
DELAWARE	7,784,000	24,640,000	-68%	21,296,000	-63%
MICHIGAN	7,638,400	7,136,000	7%	5,835,200	31%
MARYLAND	4,379,200	11,840,000	-63%	12,992,000	-66%
GEORGIA	2,128,000	2,800,000	-24%	3,364,000	-37%
SOUTH CAROLINA	1,724,800	2,360,000	-27%	1,992,000	-13%
FLORIDA	403,200	0	NA	0	NA
VIRGINIA	313,600	560,000	-44%	344,000	-9%
DOM. REP.	21,430	46,555	-54%	15,941	34%
OKLAHOMA	0	0	NA	201,600	-100%
COSTA RICA	0	0	NA	1,708	-100%
CANADA	0	0	NA	781	-100%
ALABAMA	0	0	NA	0	NA
GUATEMALA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
HONDURAS	0	0	NA	0	NA
BRAZIL	0	0	NA	0	NA
Total	158,994,699	209,768,169	-24.2%	216,006,661	-26.4%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
CALIFORNIA	213,334,400	125,169,700	70%	144,564,554	48%
ARIZONA	130,097,135	57,120,925	128%	28,479,146	357%
GEORGIA	92,996,775	89,356,000	4%	125,587,200	-26%
NORTH CAROLINA	68,594,675	118,707,000	-42%	105,583,480	-35%
MISSOURI	67,983,270	108,088,800	-37%	106,602,160	-36%
INDIANA	61,411,350	188,525,200	-67%	153,359,940	-60%
TEXAS	55,360,000	32,713,800	69%	60,557,038	-9%
MEXICO	50,667,593	87,693,067	-42%	57,512,507	-12%
SOUTH CAROLINA	19,422,400	25,460,000	-24%	40,000,000	-51%
DELAWARE	17,680,400	59,040,000	-70%	43,284,000	-59%
MICHIGAN	13,486,800	24,136,000	-44%	10,499,200	28%
MARYLAND	10,214,400	29,240,000	-65%	25,652,000	-60%
FLORIDA	7,436,800	9,920,000	-25%	4,944,000	50%
OKLAHOMA	520,000	0	NA	201,600	158%
VIRGINIA	358,400	560,000	-36%	360,000	0%
DOM. REP.	70,826	307,206	-77%	109,766	-35%
ALABAMA	0	0	NA	1,952,000	-100%
MISSISSIPPI	0	0	NA	584,000	-100%
COSTA RICA	0	0	NA	10,634	-100%
CANADA	0	0	NA	783	-100%
GUATEMALA	0	0	NA	12	-100%
HONDURAS	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
BRAZIL	0	0	NA	0	NA
Total	809,635,224	956,037,698	-15.3%	909,844,019	-11.0%

Last 30 Days Movement:

- California 70% above 2024, 48% above average
- Arizona well above 2024 and average
- Georgia 4% above 2024, 26% below average
- N. Carolina 42% below 2024, 35% below average
- Missouri 37% below 2024, 36% below average
- Indiana 67% below 2024, 60% below average
- Texas 69% above 2024, 9% below average
- Mexico 42% below 2024, 12% below average
- S. Carolina 24% below 2024, 51% below average
- Delaware 70% below 2024, 59% below average
- Michigan 44% below 2024, 28% above average
- Maryland 65% below 2024, 60% below average
- Florida 25% below 2024, 50% above average

Year to Date Movement:

- Mexico 10% above 2024, 12% above average
- Florida 27% below 2024, 32% below average
- Georgia 28% below 2024 and average
- California 11% above 2024, 22% above average
- Arizona 21% above 2024, 75% above average
- Texas 20% above 2024, 10% below average
- Guatemala 16% above 2024, 50% above average
- N. Carolina 39% below 2024, 26% below average
- Missouri 41% below 2024, 39% below average
- Indiana 68% below 2024, 60% below average
- S. Carolina 47% below 2024, 50% below average
- Honduras 13% above 2024, 29% below average
- Costa Rica 35% above 2024, well above average
- Delaware 70% below 2024, 59% below average
- Michigan 44% below 2024, 28% above average
- Maryland 65% below 2024, 60% below average
- Brazil well above 2024, 98% above average
- Dom. Rep. 44% below 2024, 32% above average
- Panama 18% below 2024, 68% below average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	1,252,962,868	1,142,227,967	10%	1,115,623,228	12%
FLORIDA	661,523,420	903,244,000	-27%	968,809,240	-32%
GEORGIA	470,821,025	657,588,000	-28%	651,907,060	-28%
CALIFORNIA	293,774,400	263,822,825	11%	241,493,846	22%
ARIZONA	287,364,075	237,183,247	21%	164,669,339	75%
TEXAS	273,250,000	228,558,100	20%	303,563,739	-10%
GUATEMALA	243,750,488	210,184,839	16%	162,962,455	50%
NORTH CAROLINA	81,846,275	133,507,000	-39%	110,391,480	-26%
MISSOURI	68,140,070	114,888,800	-41%	111,224,560	-39%
INDIANA	61,411,350	190,925,200	-68%	155,103,940	-60%
SOUTH CAROLINA	49,664,400	94,140,000	-47%	99,200,000	-50%
HONDURAS	48,567,537	43,078,848	13%	68,043,799	-29%
COSTA RICA	34,383,068	25,508,268	35%	16,937,276	103%
DELAWARE	17,680,400	59,040,000	-70%	43,284,000	-59%
MICHIGAN	13,486,800	24,136,000	-44%	10,499,200	28%
MARYLAND	10,214,400	29,240,000	-65%	25,652,000	-60%
BRAZIL	1,898,875	627,694	203%	959,367	98%
DOM. REP.	1,433,447	2,548,020	-44%	1,086,169	32%
PANAMA	1,240,070	1,519,767	-18%	3,832,582	-68%
OKLAHOMA	520,000	0	NA	201,600	158%
VIRGINIA	358,400	560,000	-36%	360,000	0%
ALABAMA	0	0	NA	8,684,000	-100%
MISSISSIPPI	0	0	NA	2,136,000	-100%
CANADA	0	36	-100%	790	-100%
Total	3,874,291,368	4,362,528,611	-11.2%	4,266,625,670	-9.2%

Seedless FOB Pricing

- Slow and steady price increase over past month leveled off this week, last 3 weeks similar pricing to last year
- Most regions moved downward except Texas

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.199	\$0.195	\$0.228
Last 30 Days	\$0.195	\$0.203	\$0.225
Year to Date	\$0.235	\$0.262	\$0.253

