

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

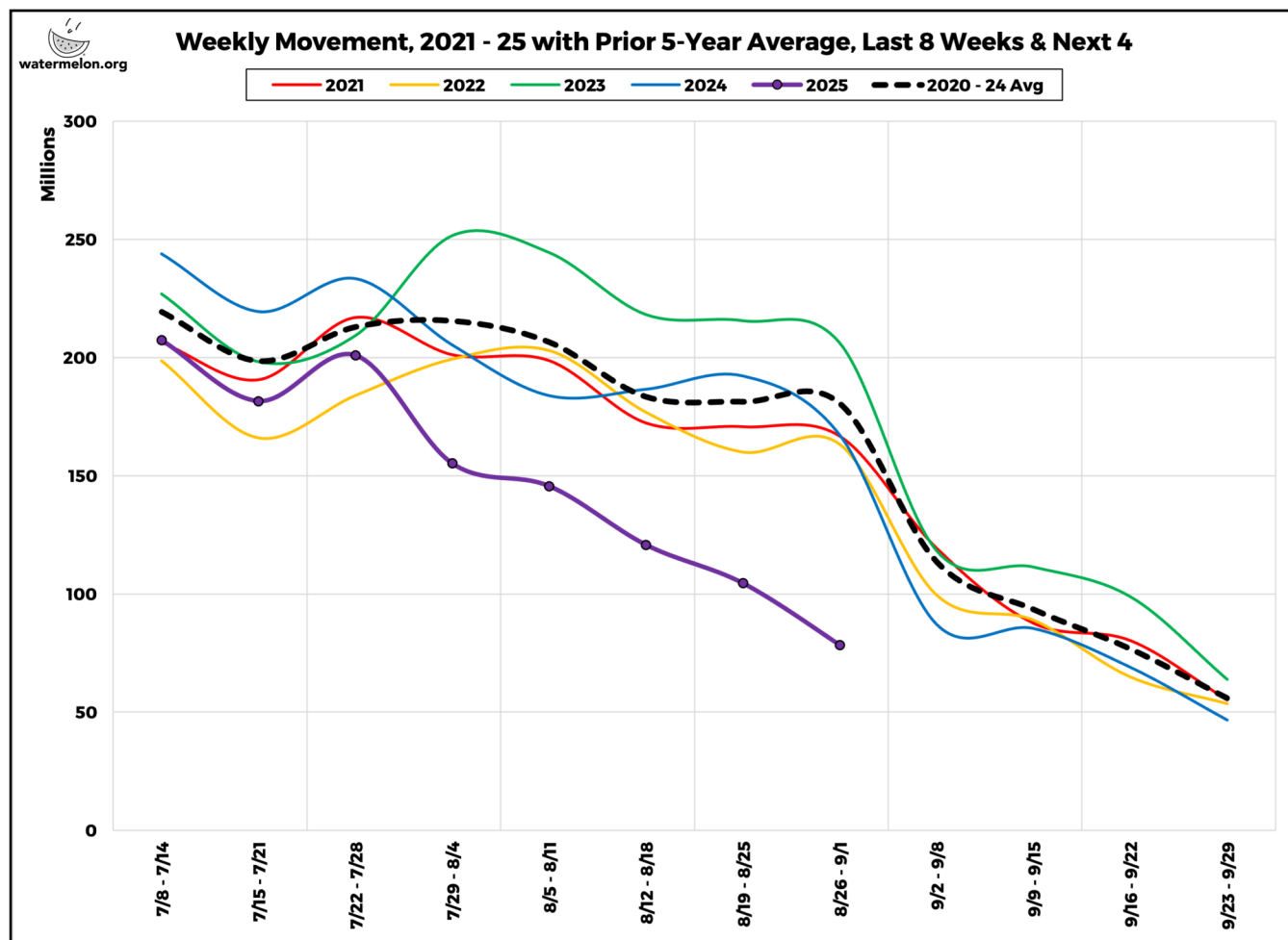
Data current through September 2, 2025

- According to USDA-AMS data, volume continues to fall well short of recent years
- Past week seedless FOB ticked up slightly, though remains below recent years

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	70,850,831	144,783,910	-51.1%	170,966,013	-58.6%
Last 30 Days	482,689,243	758,666,549	-36.4%	803,099,580	-39.9%
Year to Date	4,306,146,311	5,065,292,293	-15.0%	5,004,935,738	-14.0%

Movement

- Past 30 days roughly 40% below prior five-year average according to USDA-AMS
- Year to date is 14% below average or nearly 700 million pounds



Source: AMS Market News Portal

To download NWPB's detailed Excel files visit:

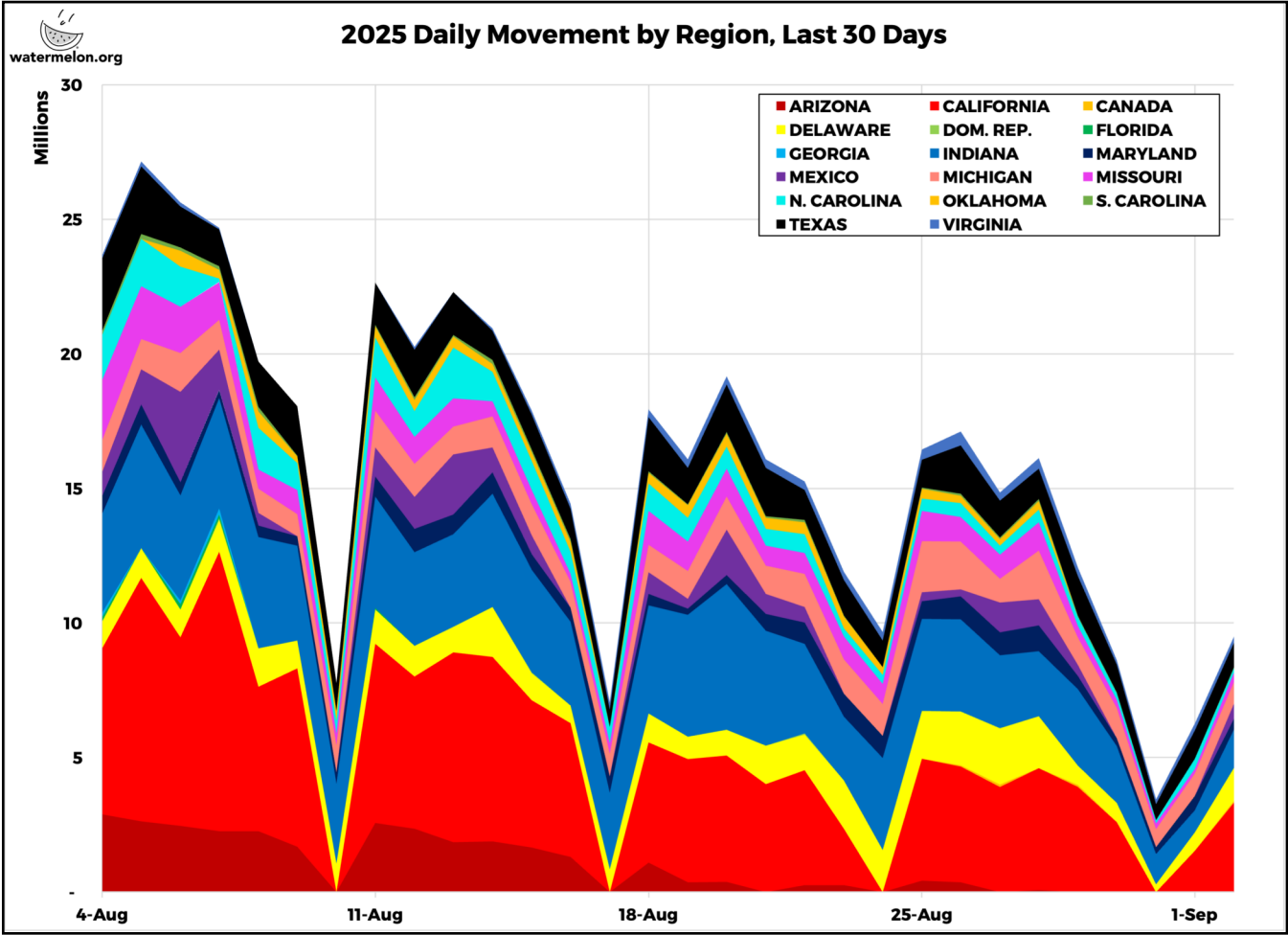
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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Source Regions—Last Week vs. Prior

- **Decreasing volume:** AZ, CA, DE, IN, MD, MX, MI, MO, NC, OK, SC, TX, VA
- **Stable volume:**
- **Increasing volume:** Canada



Last 7 Days Movement:

- California 41% below 2024, 42% below average
- Indiana 70% below 2024, 71% below average
- Delaware 46% below 2024, 56% below average
- Texas even with 2024, 36% below average
- Michigan 64% above 2024, 62% below average
- Maryland 49% below 2024, 65% below average
- Missouri well above 2024, 12% below average
- Mexico 71% below 2024, 67% below average
- N. Carolina 49% below 2024, 85% below average
- Virginia 14% below 2024, 40% below average
- Oklahoma well above 2024, 52% below average
- S. Carolina well above 2024 and average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
CALIFORNIA	19,791,400	33,672,250	-41%	34,297,250	-42%
INDIANA	13,450,075	44,920,000	-70%	46,010,400	-71%
DELAWARE	7,632,000	14,080,000	-46%	17,388,000	-56%
TEXAS	7,560,000	7,560,000	0%	11,821,209	-36%
MICHIGAN	7,123,200	20,000,000	-64%	18,616,000	-62%
MARYLAND	3,785,600	7,440,000	-49%	10,956,000	-65%
MISSOURI	3,449,600	0	NA	3,922,400	-12%
MEXICO	3,045,411	10,513,153	-71%	9,180,660	-67%
NORTH CAROLINA	2,048,100	4,000,000	-49%	14,002,800	-85%
VIRGINIA	1,859,200	2,160,000	-14%	3,112,000	-40%
OKLAHOMA	560,000	0	NA	1,155,600	-52%
SOUTH CAROLINA	224,000	0	NA	8,000	2700%
CANADA	221,094	371,530	-40%	458,140	-52%
ARIZONA	80,000	0	NA	15,660	411%
DOM. REP.	21,151	66,977	-68%	20,989	1%
COSTA RICA	0	0	NA	906	-100%
FLORIDA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
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	70,850,831	144,783,910	-51.1%	170,966,013	-58.6%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
CALIFORNIA	134,010,150	167,328,525	-20%	161,401,777	-17%
INDIANA	99,616,275	240,280,000	-59%	213,650,900	-53%
TEXAS	42,440,000	48,440,000	-12%	49,137,859	-14%
DELAWARE	35,913,600	78,380,000	-54%	77,240,000	-54%
MICHIGAN	34,137,600	56,696,000	-40%	52,052,800	-34%
ARIZONA	29,007,500	9,640,000	201%	2,255,845	1186%
MISSOURI	26,476,800	17,384,000	52%	38,863,200	-32%
NORTH CAROLINA	23,737,775	42,600,000	-44%	94,558,200	-75%
MEXICO	21,477,516	46,742,833	-54%	44,147,678	-51%
MARYLAND	17,550,400	35,260,000	-50%	49,804,000	-65%
OKLAHOMA	8,400,000	0	NA	4,912,400	71%
VIRGINIA	6,264,000	12,000,000	-48%	10,636,000	-41%
SOUTH CAROLINA	2,083,200	1,760,000	18%	1,864,000	12%
FLORIDA	562,400	0	NA	0	NA
GEORGIA	515,200	1,320,000	-61%	1,416,000	-64%
CANADA	293,655	570,679	-49%	1,040,388	-72%
DOM. REP.	203,172	264,512	-23%	111,661	82%
COSTA RICA	0	0	NA	6,871	-100%
ALABAMA	0	0	NA	0	NA
GUATEMALA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
HONDURAS	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
BRAZIL	0	0	NA	0	NA
Total	482,689,243	758,666,549	-36.4%	803,099,580	-39.9%

Last 30 Days Movement:

- California 20% below 2024, 17% below average
- Indiana 59% below 2024, 53% below average
- Texas 12% below 2024, 14% below average
- Delaware 54% below 2024 and average
- Michigan 40% below 2024, 34% below average
- Arizona well above 2024 and average
- Missouri 52% above 2024, 32% below average
- N. Carolina 44% below 2024, 75% below average
- Mexico 54% below 2024, 51% below average
- Maryland 50% below 2024, 65% below average
- Oklahoma well above 2024, 71% above average
- Virginia 48% below 2024, 41% below average
- S. Carolina 18% above 2024, 12% above average

Year to Date Movement:

- Mexico 7% above 2024, 10% above average
- Florida 27% below 2024, 32% below average
- Georgia 28% below 2024 and average
- California 3% below 2024, 5% above average
- Arizona 27% above 2024, 87% above average
- Texas 13% above 2024, 11% below average
- Guatemala 16% above 2024, 50% above average
- Indiana 63% below 2024, 57% below average
- N. Carolina 40% below 2024, 48% below average
- Missouri 29% below 2024, 37% below average
- Delaware 61% below 2024, 55% below average
- S. Carolina 46% below 2024, 49% below average
- Honduras 13% above 2024, 29% below average
- Michigan 43% below 2024, 25% below average
- Costa Rica 35% above 2024, well above average
- Maryland 57% below 2024, 63% below average
- Oklahoma well above 2024, 78% above average
- Virginia 48% below 2024, 42% below average
- Brazil well above 2024, 98% above average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	1,272,234,664	1,186,963,608	7%	1,155,773,829	10%
FLORIDA	661,929,020	903,244,000	-27%	968,809,240	-32%
GEORGIA	471,179,425	658,388,000	-28%	652,763,060	-28%
CALIFORNIA	412,555,550	425,815,675	-3%	392,378,066	5%
ARIZONA	310,866,575	244,943,247	27%	166,503,944	87%
TEXAS	310,490,000	274,358,100	13%	349,102,398	-11%
GUATEMALA	243,750,488	210,184,839	16%	162,962,455	50%
INDIANA	152,749,750	409,925,200	-63%	351,935,640	-57%
NORTH CAROLINA	102,164,775	170,447,000	-40%	195,177,280	-48%
MISSOURI	90,405,670	127,608,800	-29%	143,683,760	-37%
DELAWARE	51,499,600	131,040,000	-61%	114,652,000	-55%
SOUTH CAROLINA	51,411,600	95,340,000	-46%	100,456,000	-49%
HONDURAS	48,567,537	43,078,848	13%	68,043,799	-29%
MICHIGAN	45,317,200	79,336,000	-43%	60,388,800	-25%
COSTA RICA	34,383,068	25,508,268	35%	16,944,147	103%
MARYLAND	26,364,800	61,460,000	-57%	71,676,000	-63%
OKLAHOMA	8,920,000	0	NA	5,004,800	78%
VIRGINIA	6,308,800	12,120,000	-48%	10,836,000	-42%
BRAZIL	1,898,875	627,694	203%	959,367	98%
DOM. REP.	1,615,189	2,812,532	-43%	1,191,395	36%
PANAMA	1,240,070	1,519,767	-18%	3,832,582	-68%
CANADA	293,655	570,715	-49%	1,041,176	-72%
ALABAMA	0	0	NA	8,684,000	-100%
MISSISSIPPI	0	0	NA	2,136,000	-100%
Total	4,306,146,311	5,065,292,293	-15.0%	5,004,935,738	-14.0%

Seedless FOB Pricing

- Most regions have held steady for past few weeks, CA/ AZ on the rise
- Most recent price points within \$0.16-\$0.20 range

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.179	\$0.204	\$0.212
Last 30 Days	\$0.178	\$0.197	\$0.215
Year to Date	\$0.229	\$0.253	\$0.248

