

Watermelon Market Report

Compiled by the National Watermelon Promotion Board

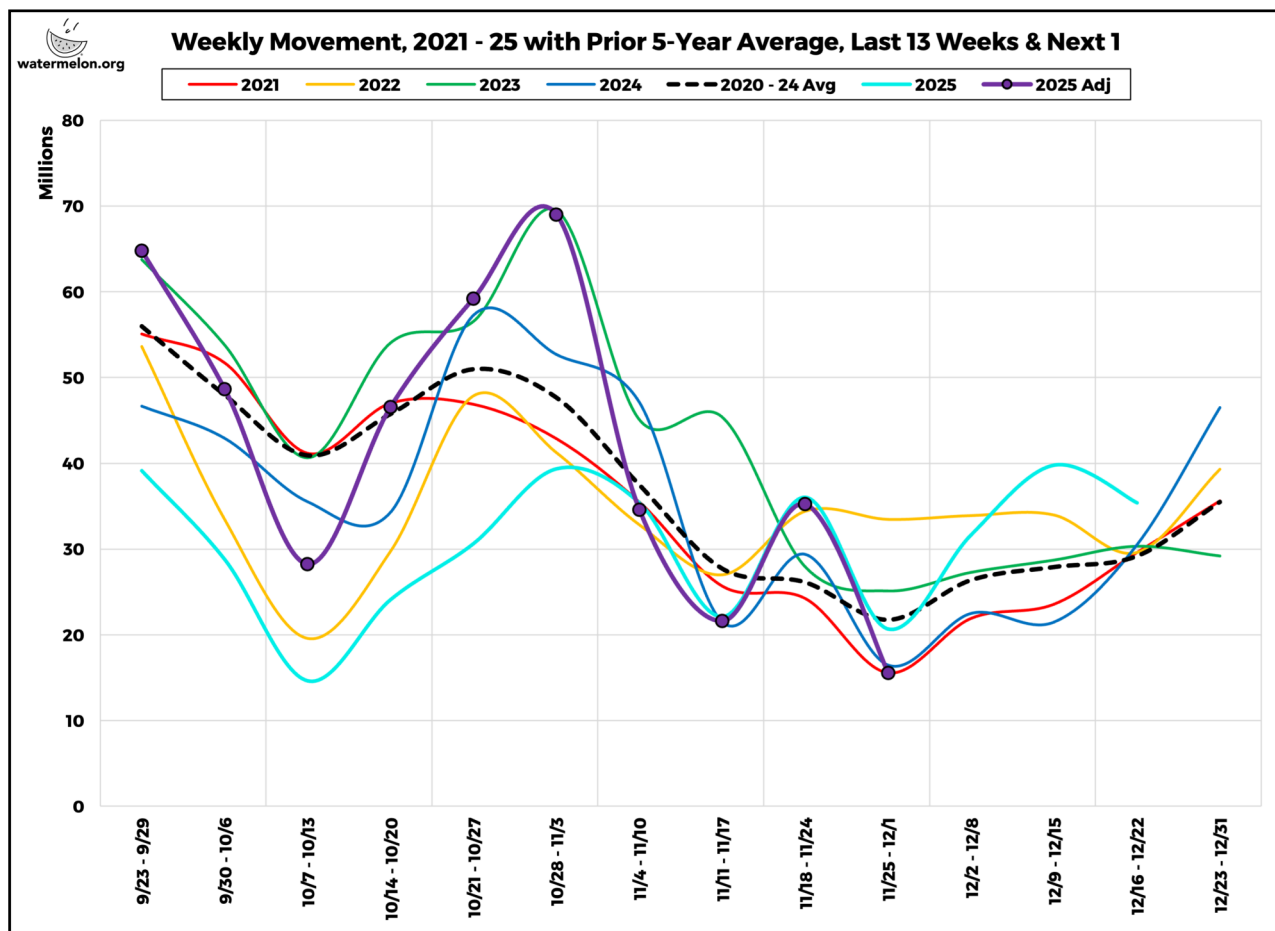


Market

AMS Data through 12/22/25, Adjustments through 11/30/25

- Unadjusted movement indicates third consecutive week finishing above average
- Weekly seedless FOB showed little change for Mexico crossings, Central America higher

AMS & Adjusted Data



Movement

- The week leading into 11/30 was 26% higher than last year, though ~1% below average
- Year to 11/30 0.1% above last year, roughly 20M pounds above average

Adjusted Data

Movement	2025 Adjusted	2024	2025 Adj v 24	2020—24 Avg	2025 Adj v Avg
Last 7 Days	20,731,695	16,453,344	+26.0%	20,880,429	-0.7%
Last 30 Days	114,229,972	116,885,995	-6.3%	130,620,153	-12.5%
Year to Date	5,686,663,821	5,680,572,483	+0.1%	5,668,493,430	+0.3%

Source: [AMS Market News Portal](#), [Adjusted Methodology](#)

To download NWPB's detailed Excel files visit:

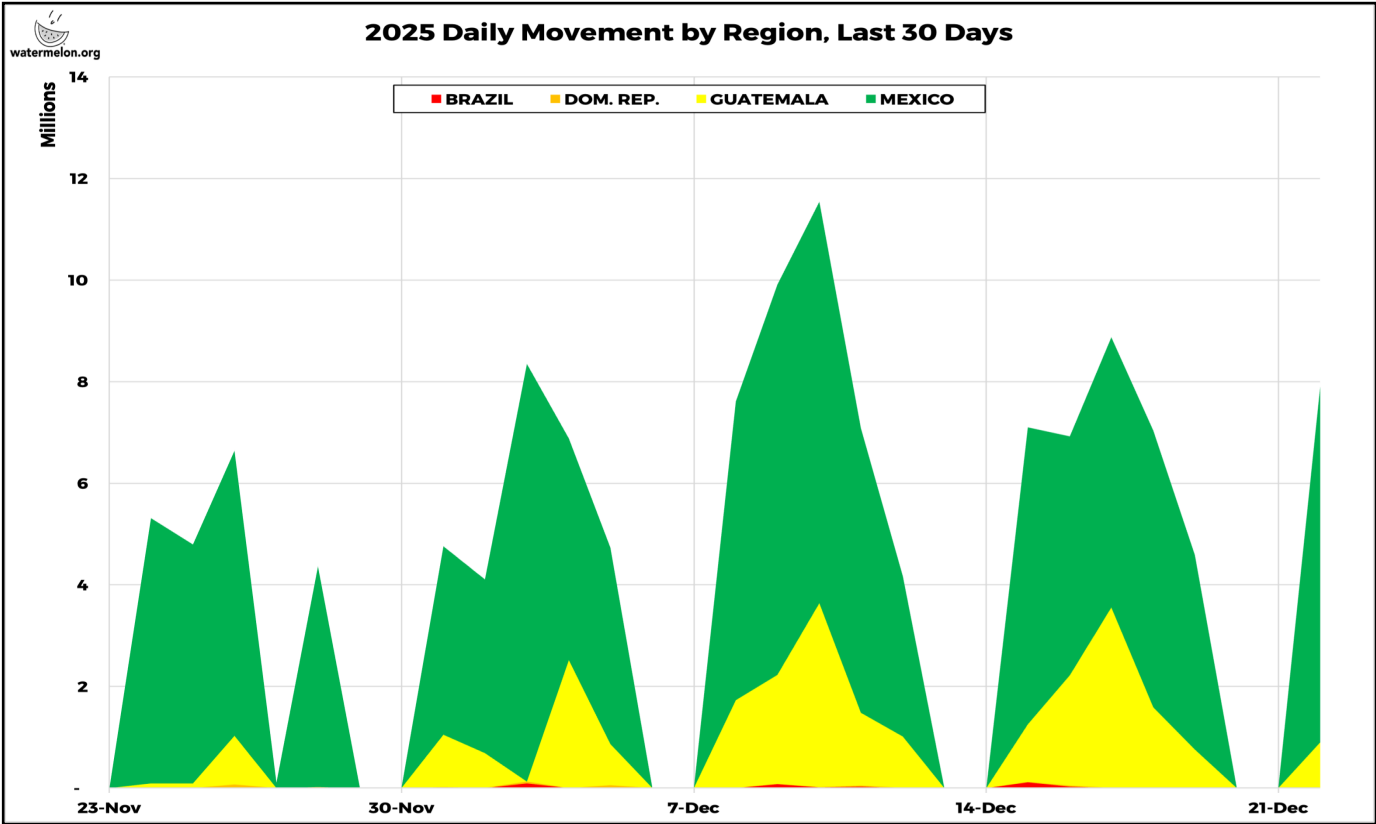
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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

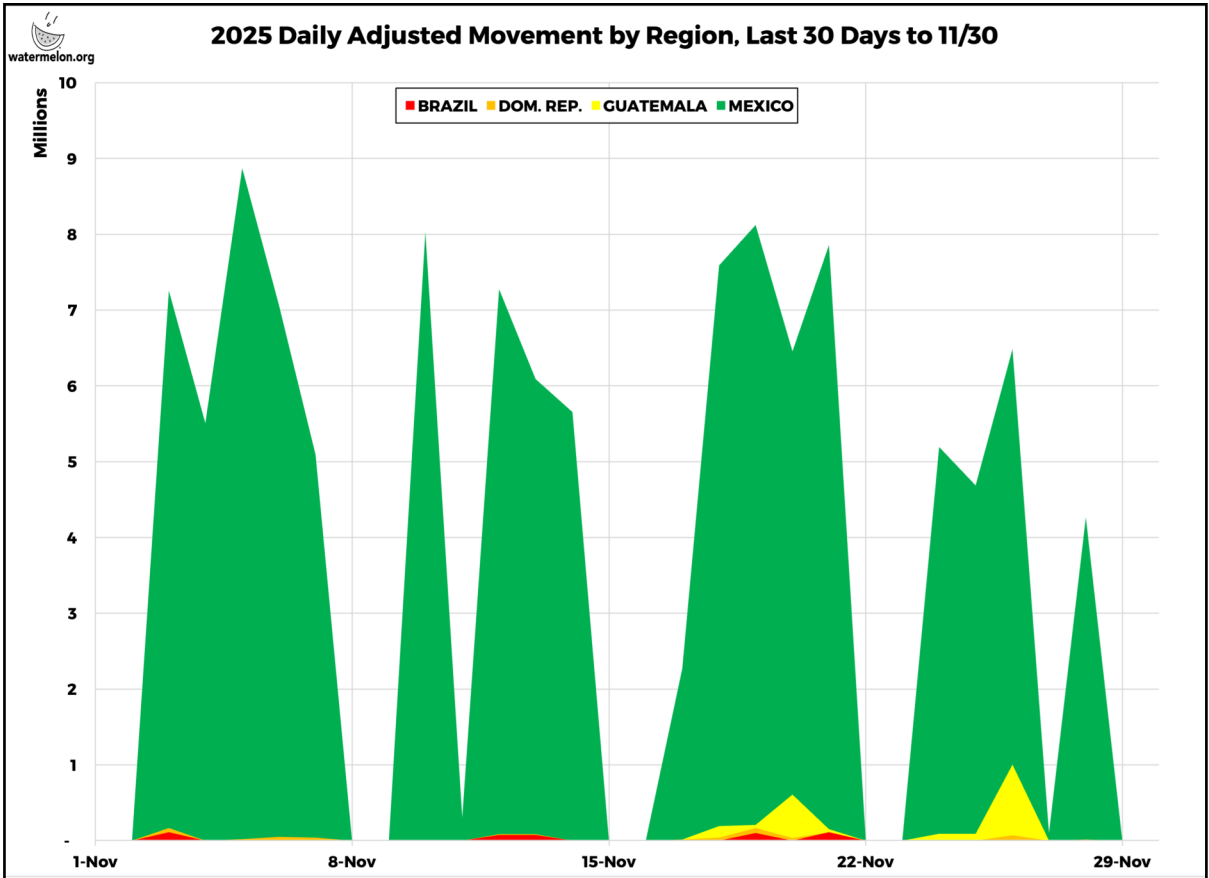
Source Regions—Past Week vs. Prior

- Decreasing volume: Brazil
- Stable volume (+15%): Dominican Republic, Guatemala, Mexico
- Increasing volume:



AMS Data

Adjusted Data



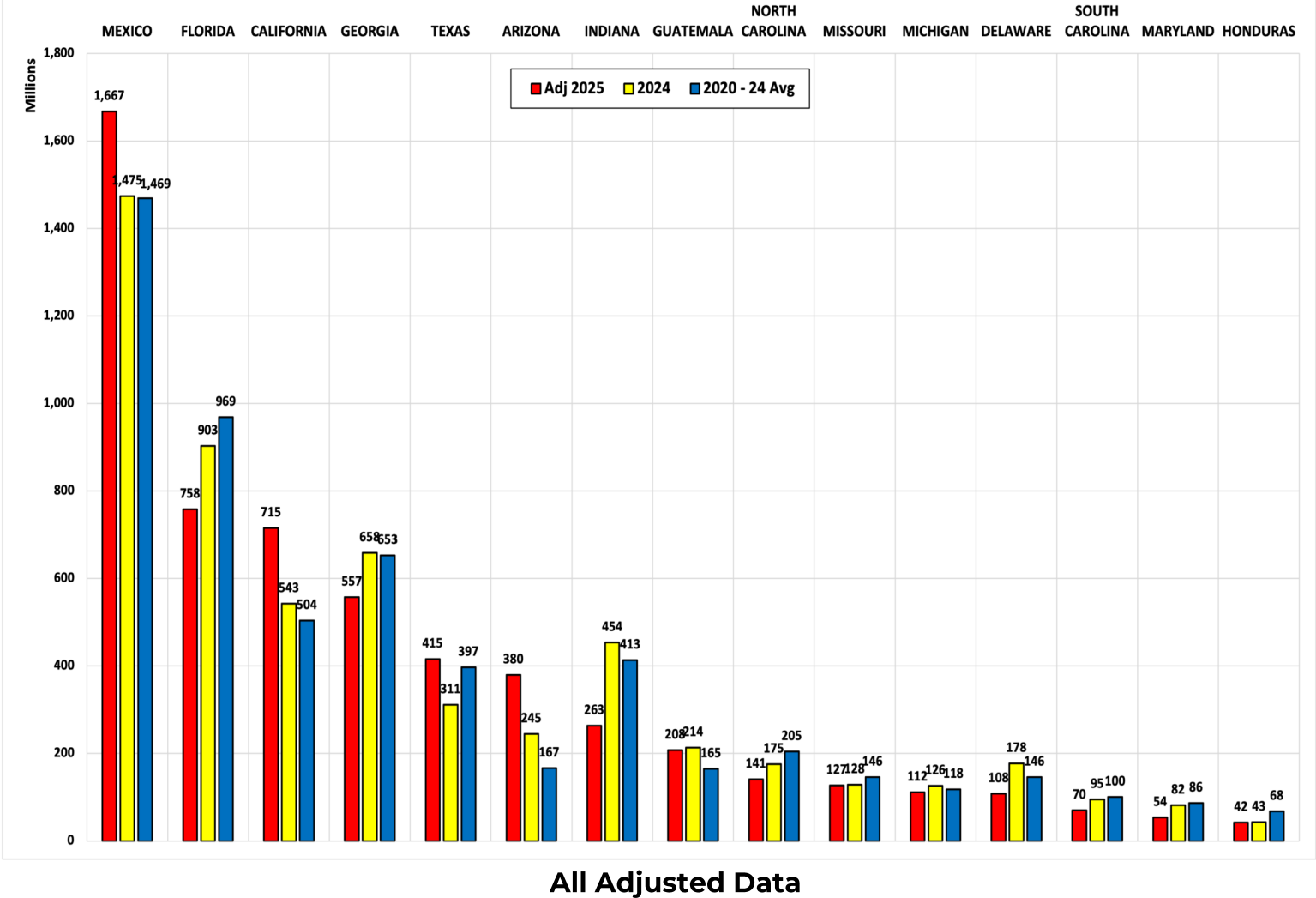


Year to Date Movement:

- Mexico 13% above 2024, 13% above average
- Florida 16% below 2024, 22% below average
- California 32% above 2024, 42% above average
- Georgia 15% below 2024 and average
- Texas 34% above 2024, 5% above average
- Arizona 55% above 2024, well above average
- Indiana 42% below 2024, 36% below average
- Guatemala 3% below 2024, 26% above average
- N. Carolina 20% below 2024, 31% below average
- Missouri 1% below 2024, 13% below average
- Michigan 12% below 2024, 5% below average
- Delaware 39% below 2024, 26% below average
- S. Carolina 27% below 2024, 30% below average
- Maryland 34% below 2024, 38% below average
- Honduras 2% below 2024, 38% below average
- Costa Rica 32% above 2024, 99% above average
- Oklahoma well above 2024, 39% above average
- Virginia 9% below 2024, 12% below average

Region	Year to 11/30				
	Adj 2025	2024	Adj 25 v 24	2020 - 24 Avg	Adj 25 v Avg
MEXICO	1,667,271,368	1,474,540,940	13%	1,469,440,529	13%
FLORIDA	758,199,805	903,244,000	-16%	968,809,240	-22%
CALIFORNIA	715,275,113	542,906,550	32%	503,761,994	42%
GEORGIA	557,095,518	658,388,000	-15%	652,763,060	-15%
TEXAS	415,491,762	311,218,100	34%	397,314,422	5%
ARIZONA	379,668,528	244,943,247	55%	166,503,944	128%
INDIANA	263,326,399	453,965,200	-42%	413,063,240	-36%
GUATEMALA	207,747,074	213,824,315	-3%	165,007,645	26%
NORTH CAROLINA	140,722,491	175,207,000	-20%	204,717,780	-31%
MISSOURI	127,216,608	128,448,800	-1%	146,211,760	-13%
MICHIGAN	111,676,678	126,496,000	-12%	117,864,800	-5%
DELAWARE	107,815,277	177,520,000	-39%	145,650,000	-26%
SOUTH CAROLINA	69,852,122	95,340,000	-27%	100,456,000	-30%
MARYLAND	53,796,239	81,580,000	-34%	86,404,000	-38%
HONDURAS	42,255,216	43,078,848	-2%	68,043,799	-38%
COSTA RICA	33,741,623	25,508,268	32%	16,944,147	99%
OKLAHOMA	14,161,733	0 NA		10,196,000	39%
VIRGINIA	13,252,044	14,600,000	-9%	15,100,000	-12%
DOM. REP.	2,943,743	4,122,908	-29%	2,076,197	42%
BRAZIL	2,462,805	920,360	168%	1,474,121	67%
CANADA	1,450,759	3,200,180	-55%	2,038,170	-29%
PANAMA	1,240,917	1,519,767	-18%	3,832,582	-68%
ALABAMA	0	0 NA		8,684,000	-100%
MISSISSIPPI	0	0 NA		2,136,000	-100%
Total	5,686,663,821	5,680,572,483	0.1%	5,668,493,430	0.3%

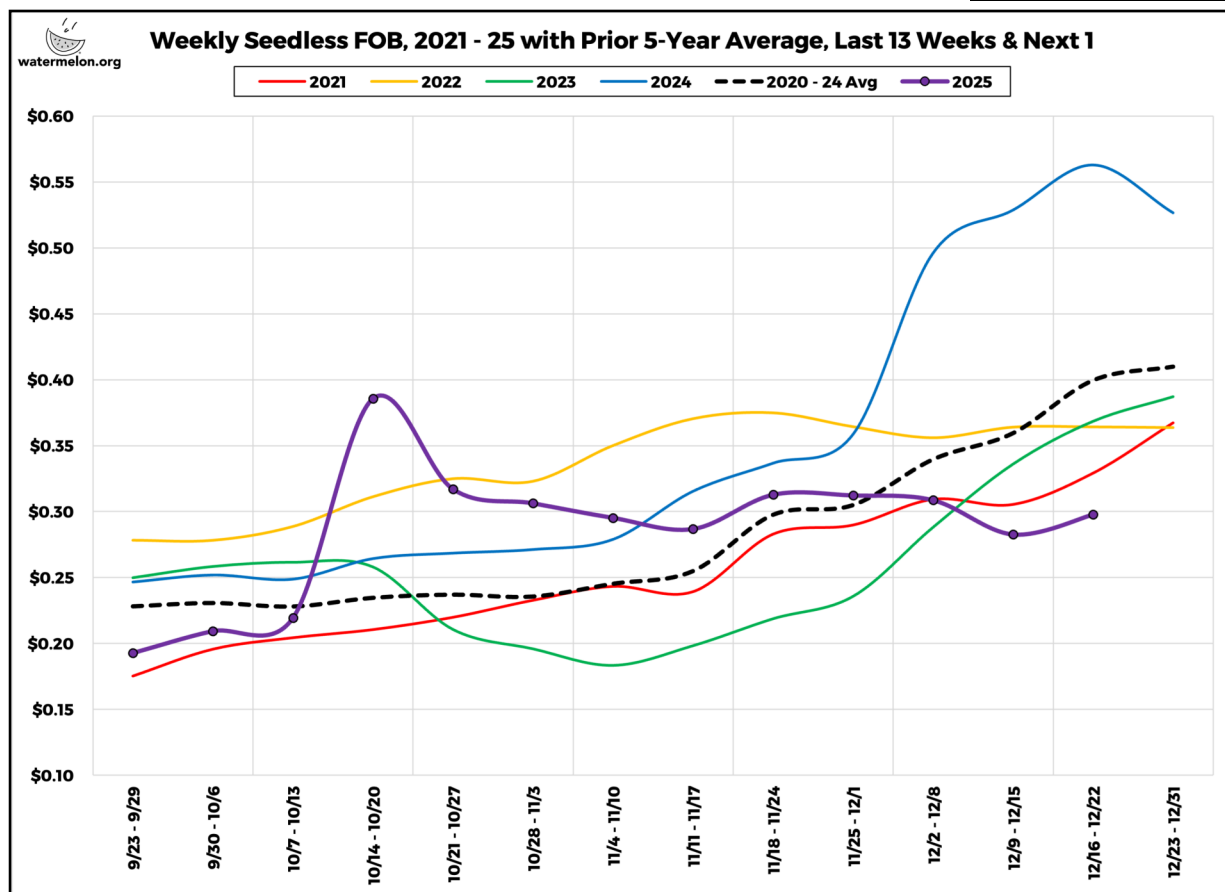
Year to 11/30 Movement by Region Across Three Timeframes, Top-15



Seedless FOB Pricing

- Crossings through Mexico and Nogales in lockstep
- Central America landing in S. Florida starting higher, FOBs tend to run higher for boat transportation

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.298	\$0.563	\$0.399
Last 30 Days	\$0.299	\$0.501	\$0.351
Year to Date	\$0.232	\$0.256	\$0.248



AMS Data

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