

Watermelon Market Report

Compiled by the National Watermelon Promotion Board

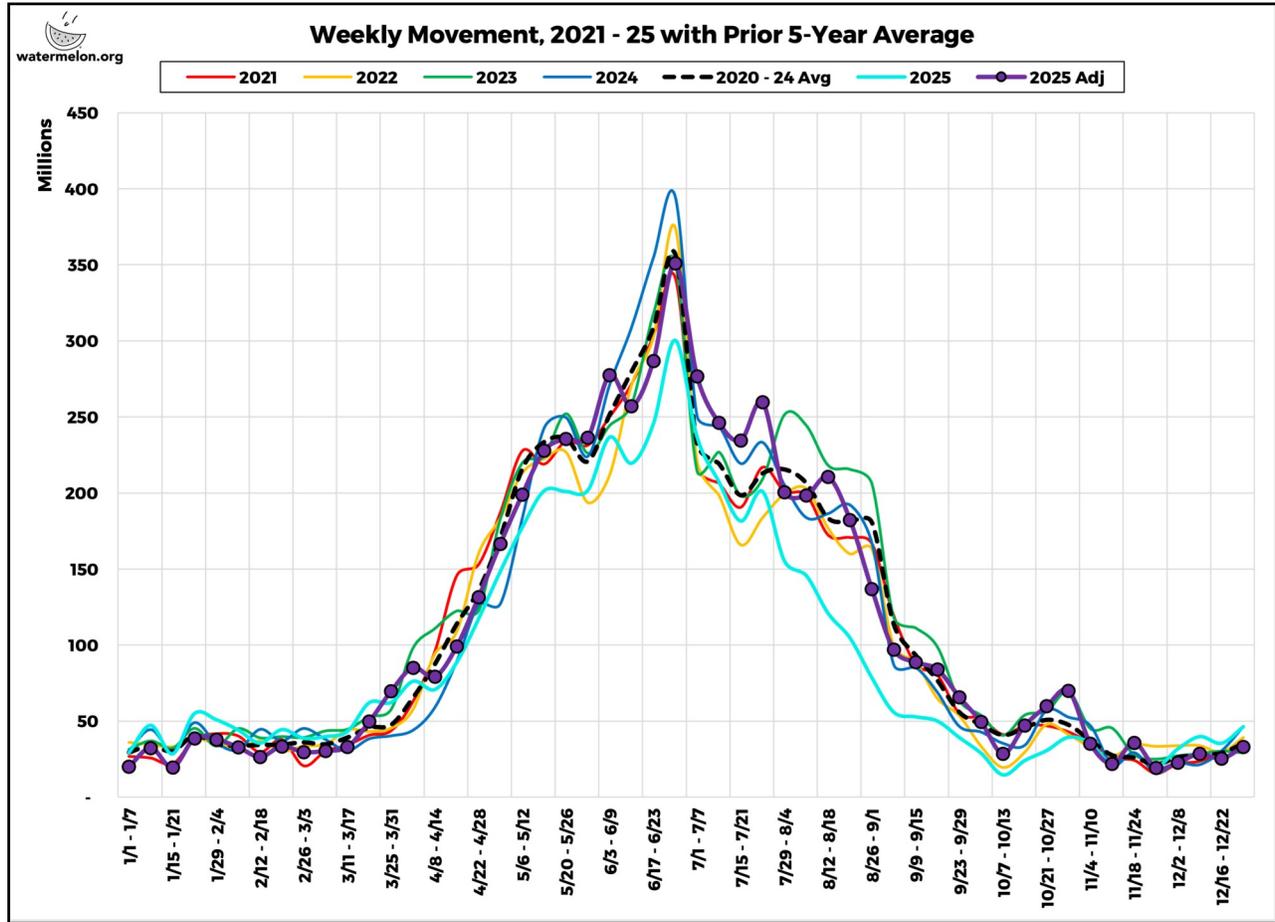


Market

AMS Data through 12/31/25, Adjustments through 12/31/25

- Full year shows adjusted data often in line with average, provided data shows quite the gap
- Weekly seedless FOB lagged average by a noticeable amount for much of Spring & Summer

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	20,036,320	32,374,306	-38.1%	29,177,300	-31.3%
Last 30 Days	109,492,342	120,951,973	-9.5%	118,895,692	-7.9%
Year to Date	5,840,591,265	5,801,524,456	+0.7%	5,790,540,572	+0.9%

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>

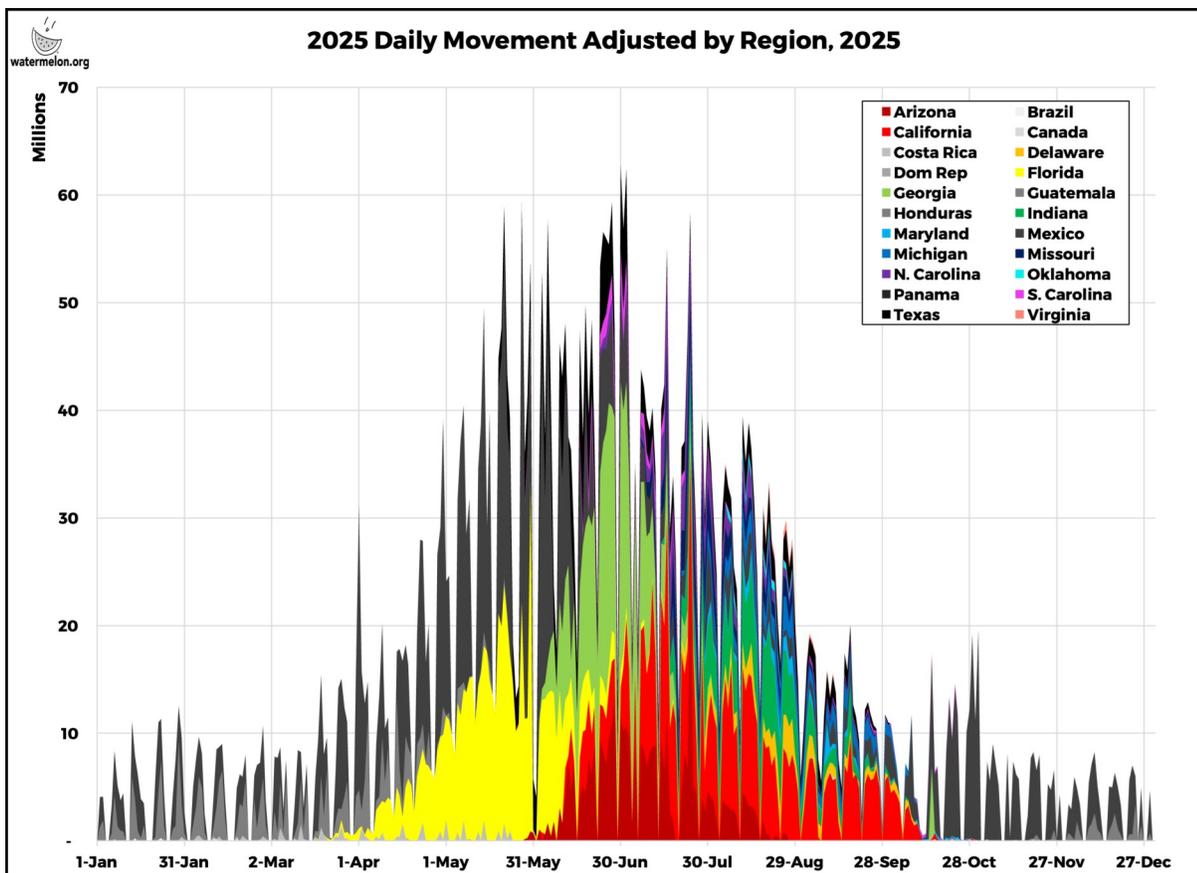
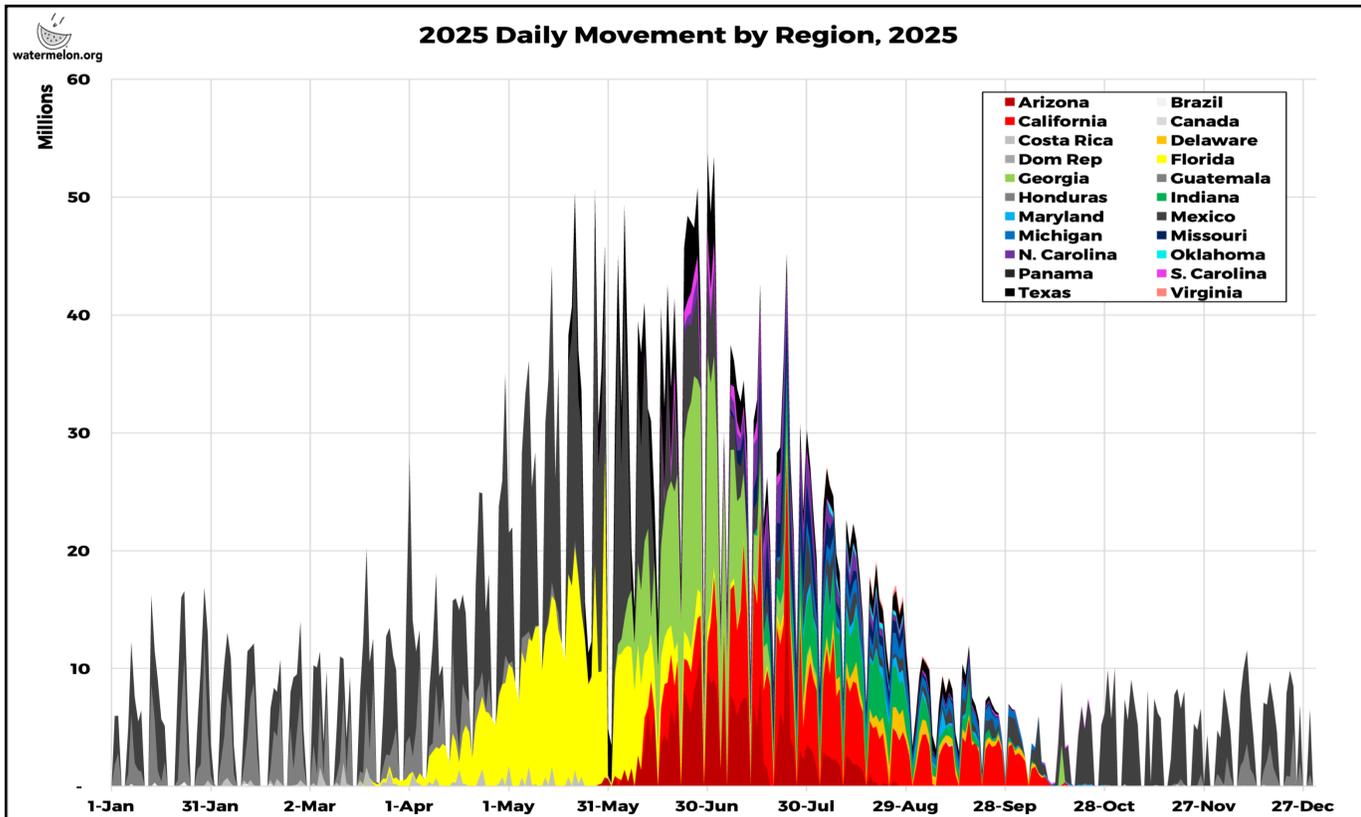
For questions or expanded information reach out to:

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



Source Regions—Past Year vs. Prior

- **Decreasing volume:** Florida, Indiana, Carolinas, Delaware, Maryland, DR, Canada, Panama
- **Stable volume (+-15%):** Mexico, Georgia, Guatemala, Missouri, Michigan, Honduras, Virginia
- **Increasing volume:** California, Texas, Arizona, Costa Rica, Oklahoma, Brazil

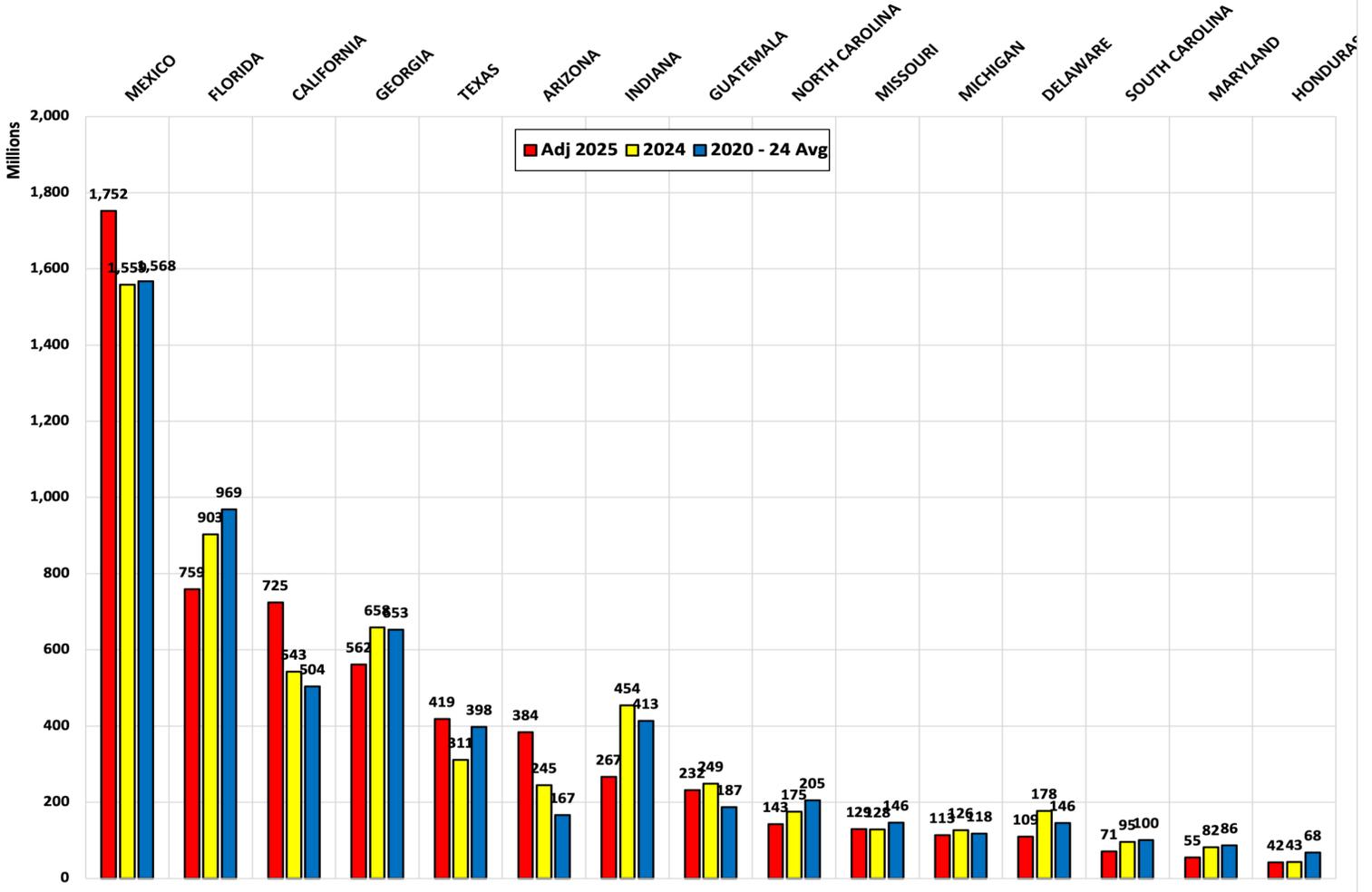


Year to Date Movement:

- Mexico 12% above 2024 and average
- Florida 16% below 2024, 22% below average
- California 33% above 2024, 44% above average
- Georgia 15% below 2024, 14% below average
- Texas 35% above 2024, 5% above average
- Arizona 57% above 2024, well above average
- Indiana 41% below 2024, 35% below average
- Guatemala 7% below 2024, 24% above average
- N. Carolina 19% below 2024, 30% below average
- Missouri even with 2024, 12% below average
- Michigan 10% below 2024, 4% below average
- Delaware 38% below 2024, 25% below average
- S. Carolina 26% below 2024, 30% below average
- Maryland 33% below 2024, 37% below average
- Honduras 2% below 2024, 38% below average
- Costa Rica 32% above 2024, 99% above average
- Oklahoma well above 2024, 41% above average
- Virginia 8% below 2024, 11% below average

Region	Year to 12/31				
	Adj 2025	2024	Adj 25 v 24	2020 - 24 Avg	Adj 25 v Avg
MEXICO	1,751,993,724	1,559,003,742	12%	1,567,725,206	12%
FLORIDA	759,114,234	903,244,000	-16%	968,809,240	-22%
CALIFORNIA	724,504,843	542,906,550	33%	503,761,994	44%
GEORGIA	561,670,491	658,388,000	-15%	652,763,060	-14%
TEXAS	418,767,728	311,218,100	35%	397,602,422	5%
ARIZONA	383,635,128	244,943,247	57%	166,503,944	130%
INDIANA	266,978,663	453,965,200	-41%	413,063,240	-35%
GUATEMALA	231,722,101	248,647,257	-7%	187,356,948	24%
NORTH CAROLINA	142,636,844	175,207,000	-19%	204,717,780	-30%
MISSOURI	129,018,934	128,448,800	0%	146,211,760	-12%
MICHIGAN	113,252,605	126,496,000	-10%	117,864,800	-4%
DELAWARE	109,289,618	177,520,000	-38%	145,650,000	-25%
SOUTH CAROLINA	70,603,254	95,340,000	-26%	100,456,000	-30%
MARYLAND	54,528,558	81,580,000	-33%	86,404,000	-37%
HONDURAS	42,262,261	43,078,848	-2%	68,091,133	-38%
COSTA RICA	33,754,950	25,508,268	32%	16,944,147	99%
OKLAHOMA	14,350,712	0	NA	10,196,000	41%
VIRGINIA	13,419,050	14,600,000	-8%	15,100,000	-11%
DOM. REP.	3,132,517	4,370,638	-28%	2,374,261	32%
BRAZIL	2,790,115	2,338,859	19%	2,253,882	24%
CANADA	1,470,198	3,200,180	-54%	2,038,173	-28%
PANAMA	1,241,424	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	5,830,137,952	5,801,524,456	0.5%	5,790,540,572	0.7%

Year to 12/31 Movement by Region Across Three Timeframes, Top-15

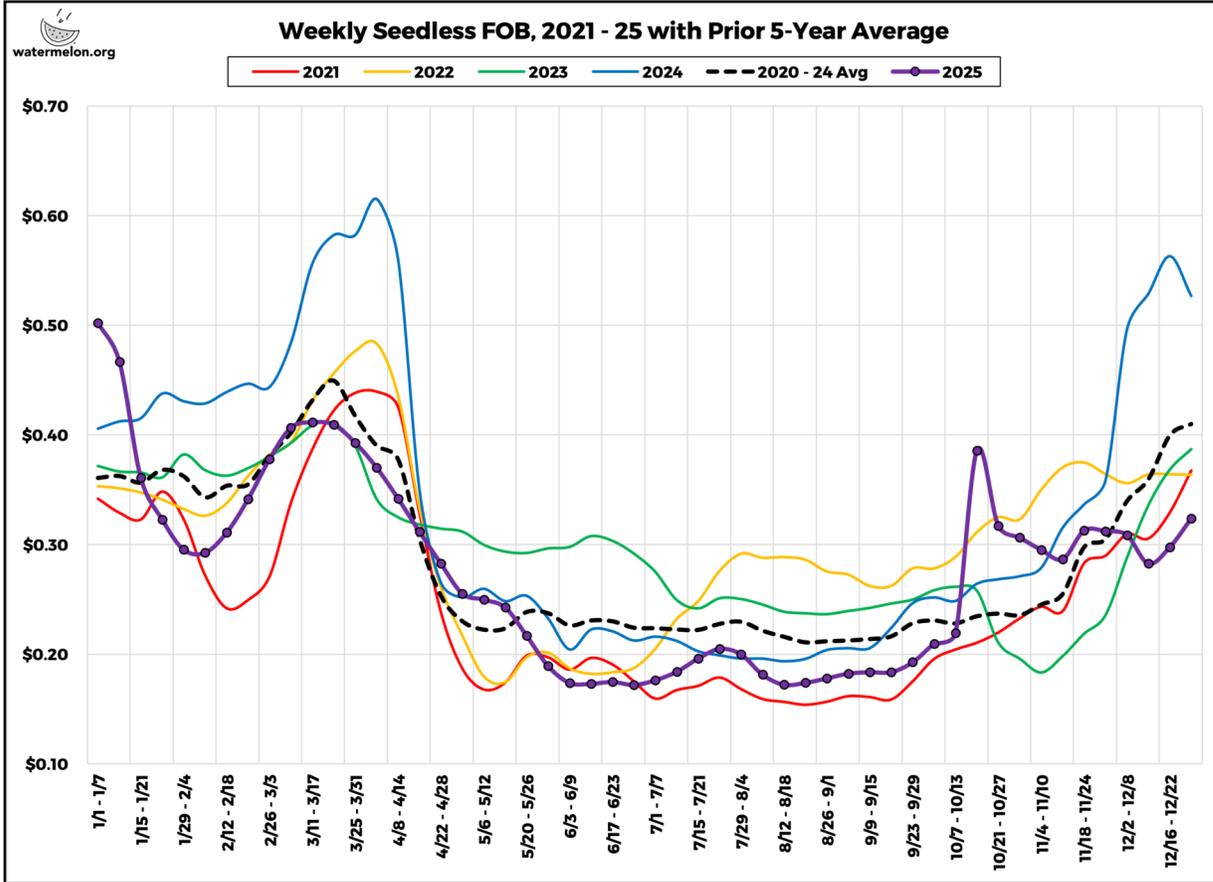


All Adjusted Data

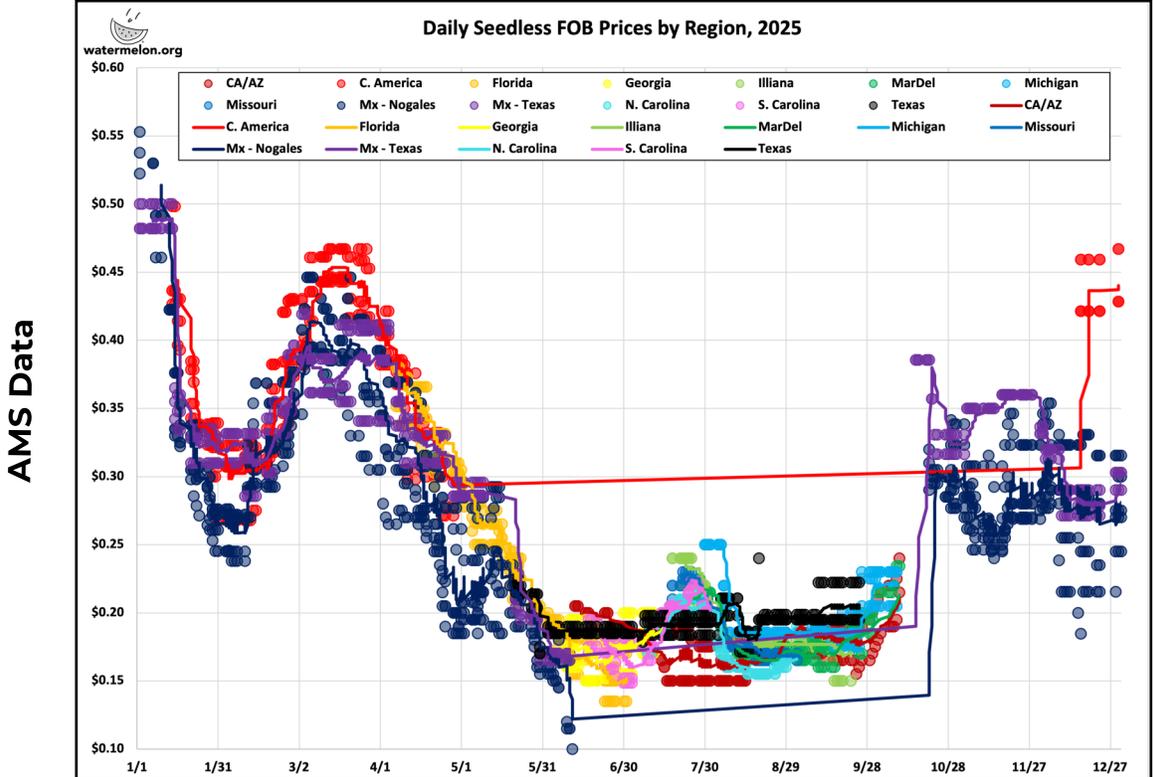
Seedless FOB Pricing

- Year closes on four straight weeks of below average
- Preceding couple months were average or better, much of spring/summer were noticeably below average

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.318	\$0.522	\$0.402
Last 30 Days	\$0.304	\$0.530	\$0.380
Year to Date	\$0.233	\$0.258	\$0.249



AMS Data



AMS Data