

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

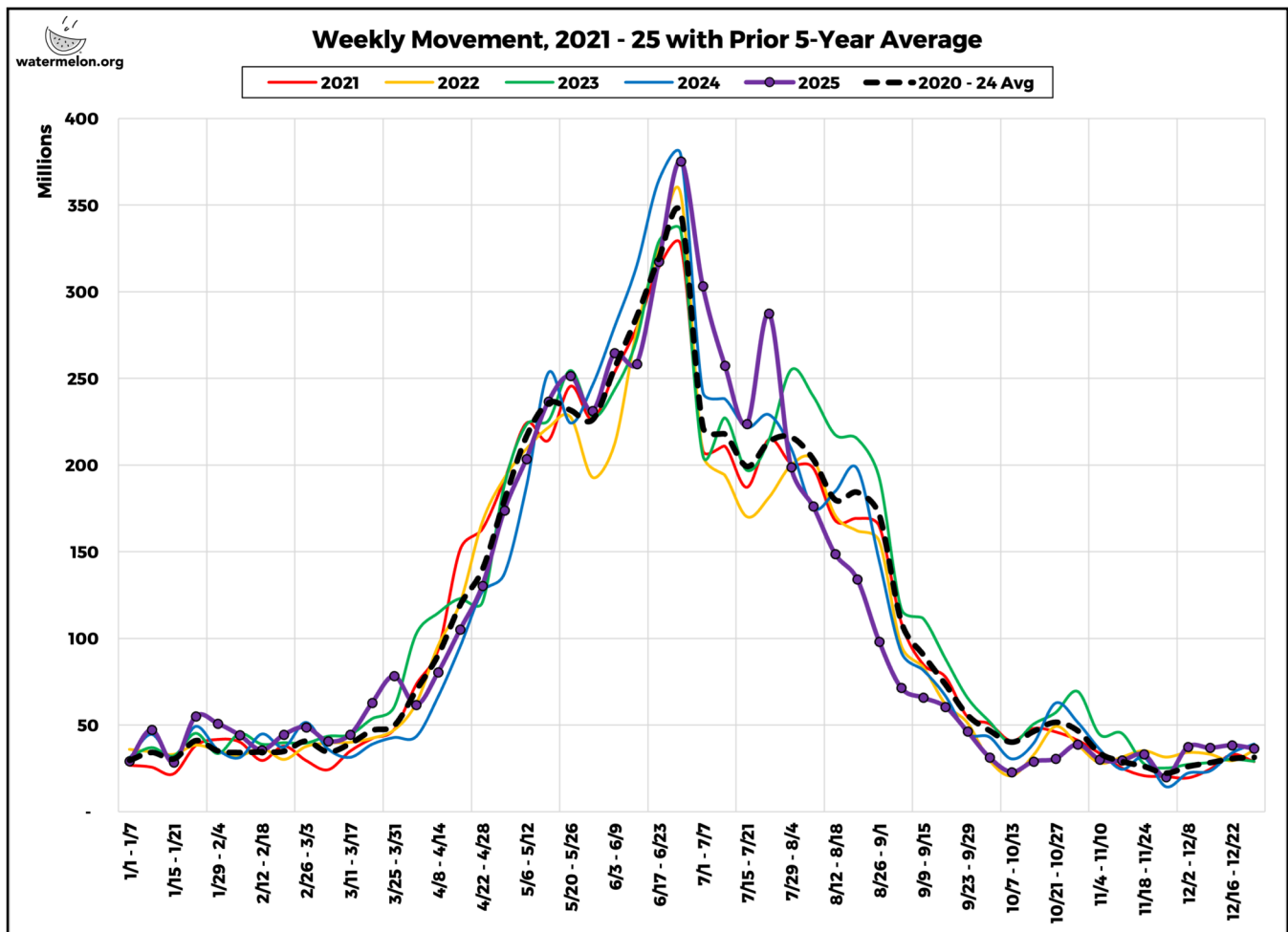
Data current through December 31, 2025

- Full year volume was similar to both prior year and average from 2020—24
- Annual average seedless FOB was 12.1% below prior year and 8.6% below 2020-24 average

Movement	2025	2024	2025 v 24	2020—24 Avg	2025 v Avg
Last 7 Days	28,027,046	32,374,306	-13.4%	29,177,300	-3.9%
Last 30 Days	153,180,708	120,951,973	+26.6%	118,895,692	+28.8%
Year to Date	5,785,926,971	5,801,524,456	-0.3%	5,790,540,572	-0.1%

Movement

- First half of 2025 was mostly average or above with tighter supply in April
- Second half started with heavier than usual volume then fell below average rest of summer



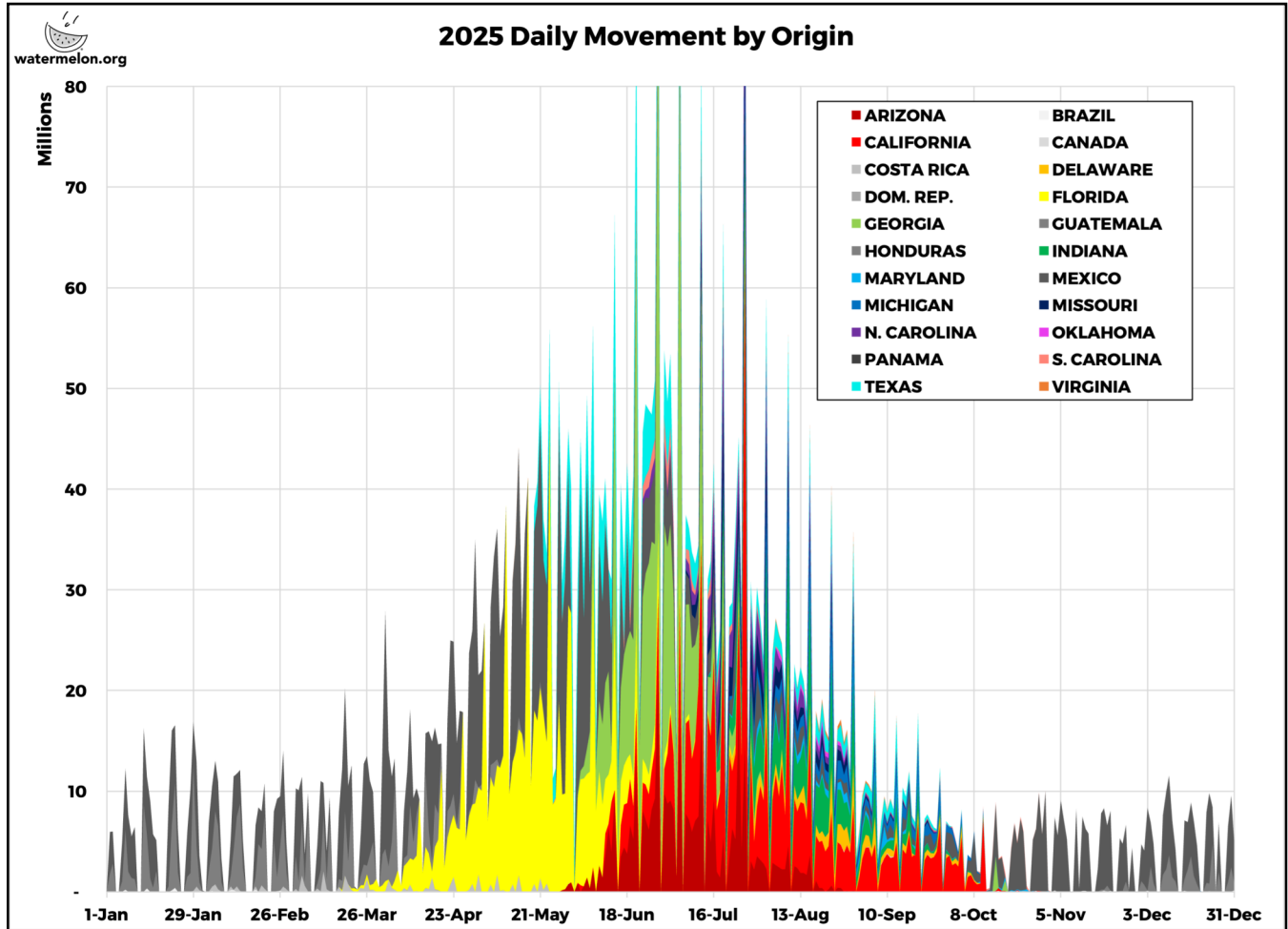
Source: AMS Market News Portal
 To download NWPB's detailed Excel files visit:
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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Source Regions—2025 vs. 2024

- **Decreased volume:** Indiana, N. Carolina, Michigan, Delaware, S. Carolina, Maryland, Virginia
- **Stable (+-15%):** Mexico, Florida, Georgia, Guatemala, Missouri, Honduras
- **Increased volume:** California, Texas, Arizona, Costa Rica, Oklahoma, Brazil





Last 7 Days Movement:

- Mexico 9% above 2024, 3% below average
- Guatemala 49% below 2024, 6% below average
- Brazil 54% below 2024, 8% below average
- Dom. Rep. 50% below 2024, 51% below average

Region	Last 7 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	21,663,526	19,893,023	9%	22,382,034	-3%
GUATEMALA	6,171,042	12,066,167	-49%	6,538,860	-6%
BRAZIL	155,760	341,682	-54%	170,132	-8%
DOM. REP.	36,718	73,434	-50%	74,423	-51%
HONDURAS	0	0	NA	11,852	-100%
CALIFORNIA	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
TEXAS	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
COSTA RICA	0	0	NA	0	NA
FLORIDA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
Total	28,027,046	32,374,306	-13.4%	29,177,300	-3.9%

Region	Last 30 Days				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	116,607,197	84,462,802	38%	95,507,357	22%
GUATEMALA	35,672,983	34,822,942	2%	21,998,978	62%
BRAZIL	572,220	1,418,499	-60%	779,761	-27%
DOM. REP.	239,604	247,730	-3%	274,258	-13%
MICHIGAN	88,689	0	NA	0	NA
TEXAS	0	0	NA	288,000	-100%
HONDURAS	0	0	NA	47,334	-100%
CANADA	0	0	NA	4	-100%
CALIFORNIA	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
FLORIDA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
COSTA RICA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
Total	153,180,693	120,951,973	26.6%	118,895,692	28.8%

Last 30 Days Movement:

- Mexico 38% above 2024, 22% above average
- Guatemala 2% above 2024, 62% above average
- Brazil 60% below 2024, 27% below average
- Dom. Rep. 3% below 2024, 13% below average

Year to Date Movement:

- Mexico 4% above 2024, 3% above average
- Florida 3% below 2024, 10% below average
- California 20% above 2024, 29% above average
- Georgia 4% below 2024, 3% below average
- Texas 41% above 2024, 10% above average
- Arizona 53% above 2024, well above average
- Guatemala 14% above 2024, 51% above average
- Indiana 49% below 2024, 44% below average
- N. Carolina 21% below 2024, 32% below average
- Missouri 3% below 2024, 15% below average
- Michigan 26% below 2024, 21% below average
- Delaware 49% below 2024, 38% below average
- S. Carolina 21% below 2024, 25% below average
- Honduras 13% above 2024, 29% below average
- Maryland 44% below 2024, 47% below average
- Costa Rica 35% above 2024, well above average
- Oklahoma well above 2024, 71% above average
- Virginia 28% below 2024, 31% below average
- Brazil 40% above 2024, 46% above average

Region	To Date				
	2025	2024	2025 v 24	2020 - 24 Avg	2025 v Avg
MEXICO	1,616,929,926	1,559,003,742	4%	1,567,725,206	3%
FLORIDA	873,025,804	903,244,000	-3%	968,809,240	-10%
CALIFORNIA	651,287,315	542,906,550	20%	503,761,994	29%
GEORGIA	634,088,865	658,388,000	-4%	652,763,060	-3%
TEXAS	437,508,816	311,218,100	41%	397,602,422	10%
ARIZONA	374,713,103	244,943,247	53%	166,503,944	125%
GUATEMALA	282,401,944	248,647,257	14%	187,356,948	51%
INDIANA	229,638,495	453,965,200	-49%	413,063,240	-44%
NORTH CAROLINA	138,478,944	175,207,000	-21%	204,717,780	-32%
MISSOURI	124,068,790	128,448,800	-3%	146,211,760	-15%
MICHIGAN	93,017,647	126,496,000	-26%	117,864,800	-21%
DELAWARE	90,670,258	177,520,000	-49%	145,650,000	-38%
SOUTH CAROLINA	75,483,792	95,340,000	-21%	100,456,000	-25%
HONDURAS	48,567,537	43,078,848	13%	68,091,133	-29%
MARYLAND	45,474,582	81,580,000	-44%	86,404,000	-47%
COSTA RICA	34,383,068	25,508,268	35%	16,944,147	103%
OKLAHOMA	17,481,024	0	NA	10,196,000	71%
VIRGINIA	10,488,768	14,600,000	-28%	15,100,000	-31%
BRAZIL	3,284,951	2,338,859	40%	2,253,882	46%
DOM. REP.	2,835,579	4,370,638	-35%	2,374,261	19%
PANAMA	1,240,070	1,519,767	-18%	3,832,582	-68%
CANADA	857,693	3,200,180	-73%	2,038,173	-58%
ALABAMA	0	0	NA	8,684,000	-100%
MISSISSIPPI	0	0	NA	2,136,000	-100%
Total	5,785,926,971	5,801,524,456	-0.3%	5,790,540,572	-0.1%



Seedless FOB Pricing

- Annual average down 3.1 cents from 2024, down 2.2 cents compared to average from 2020—24
- Only around a quarter of weeks were above average

Seedless FOB	2025	2024	2020-24
Last 7 Days	\$0.306	\$0.522	\$0.402
Last 30 Days	\$0.304	\$0.530	\$0.380
Year to Date	\$0.227	\$0.258	\$0.249

