

Watermelon Market Report

Compiled by the National Watermelon Promotion Board



Market

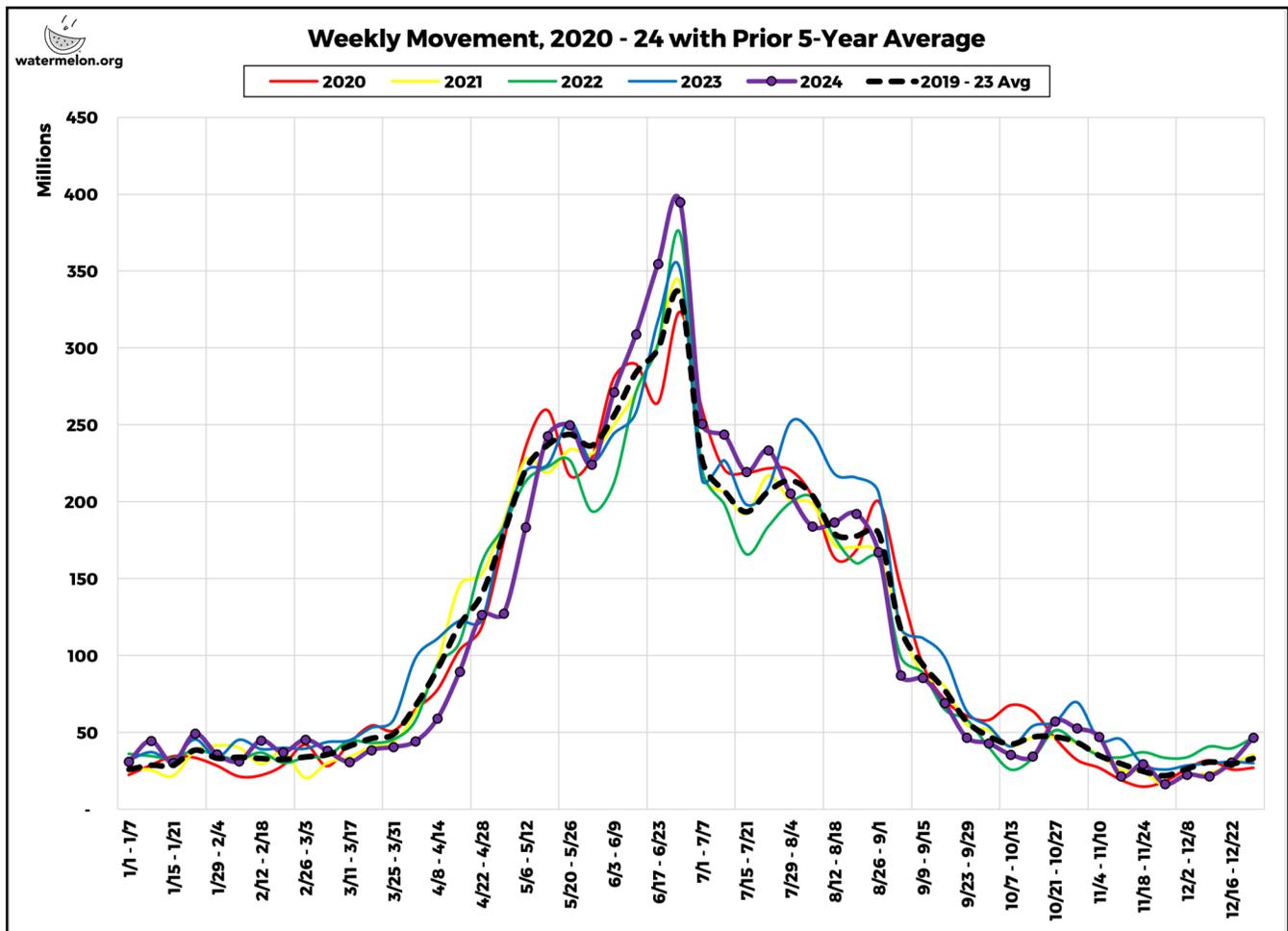
Data current through December 31, 2024

- Full year volume in 2024 was 6.3% below 2023, 0.7% above average
- Full year seedless FOB was 8.6% below 2023, 10.6% above average

Movement	2024	2023	2024 v 23	2019—23 Avg	2024 v Avg
Last 7 Days	32,374,306	29,850,000	8.5%	27,560,000	17.5%
Last 30 Days	120,951,973	118,700,000	1.9%	119,186,000	1.5%
Year to Date	5,801,524,456	6,189,130,000	-6.3%	5,760,728,000	0.7%

Movement

- Shorter volume in April & May, Memorial Day got to normal, strong volume for 4th of July
- Post peak volume was above, but from August on we mostly saw below average levels



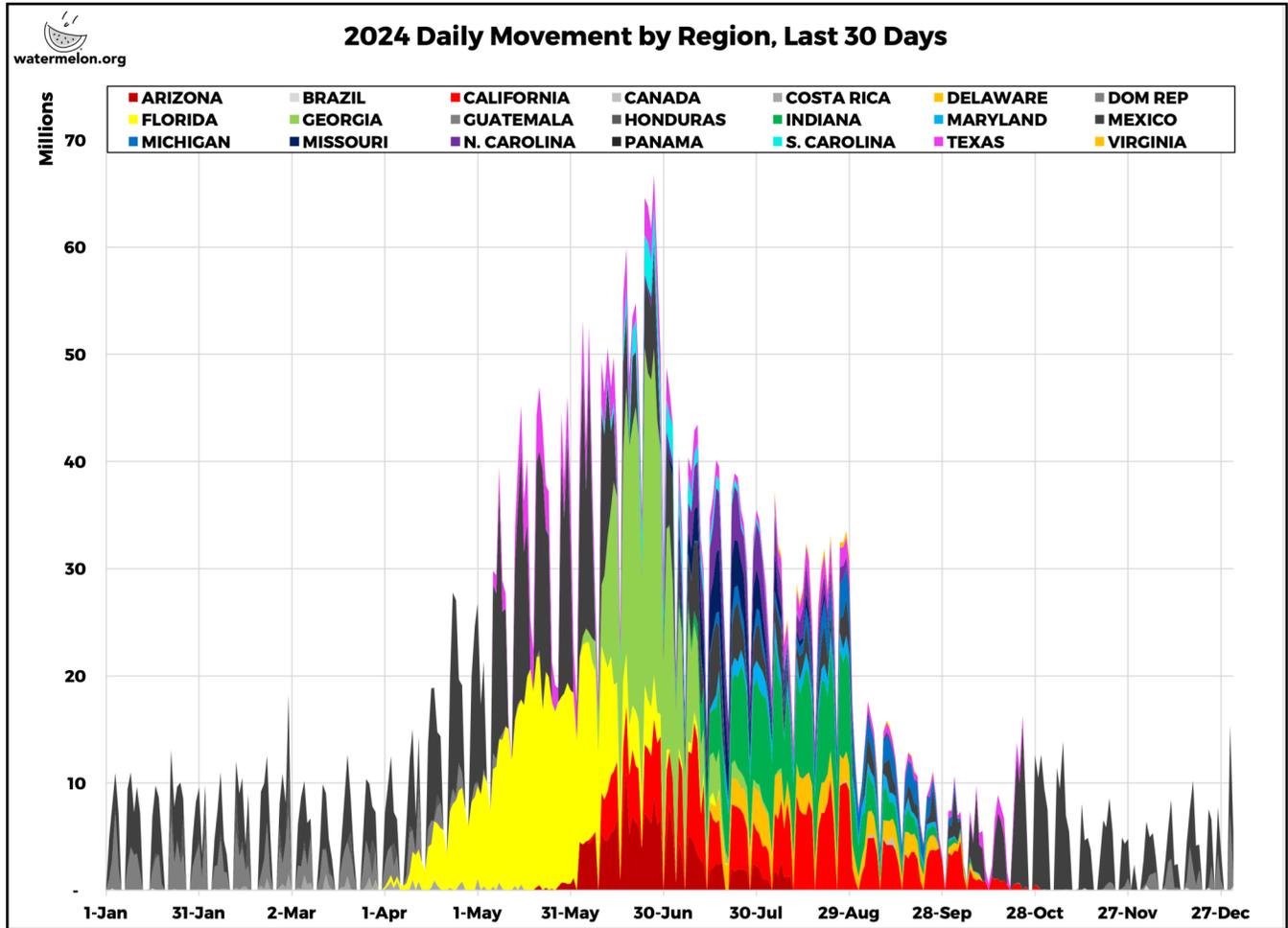
Source: AMS Market News Portal
 To download NWPB's detailed Excel files visit:
<https://www.watermelon.org/audiences/industry/research/supply-chain-research>

For questions or expanded information reach out to:

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Source Regions—2024 vs. Average

- **Decreasing volume:** Florida, Honduras, Missouri, N. Carolina, Panama, Texas, Virginia
- **Stable volume:** Georgia, Maryland, Mexico, S. Carolina
- **Increasing volume:** Arizona, Brazil, California, Canada, Costa Rica, Delaware, Dom. Rep., Guatemala, Indiana, Michigan





Last 7 Days Movement:

- Mexico 15% below 2023, 10% below average
- Guatemala 89% above 2023, well above average
- Brazil well above 2023 and average
- Dom. Rep. 47% above 2023, 22% above average

Region	Last 7 Days				
	2024	2023	2024 v 23	2019 - 23 Avg	2024 v Avg
MEXICO	19,893,023	23,300,000	-15%	22,078,000	-10%
GUATEMALA	12,066,167	6,380,000	89%	5,128,000	135%
BRAZIL	341,682	120,000	185%	102,000	235%
DOM. REP.	73,434	50,000	47%	60,000	22%
HONDURAS	0	0	NA	192,000	-100%
TEXAS	0	0	NA	0	NA
CALIFORNIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
COSTA RICA	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
FLORIDA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
Total	32,374,306	29,850,000	8.5%	27,560,000	17.5%

Region	Last 30 Days				
	2024	2023	2024 v 23	2019 - 23 Avg	2024 v Avg
MEXICO	84,462,802	91,830,000	-8%	99,660,000	-15%
GUATEMALA	34,822,942	26,030,000	34%	18,138,000	92%
BRAZIL	1,418,499	590,000	140%	494,000	187%
DOM. REP.	247,730	250,000	-1%	222,000	12%
HONDURAS	0	0	NA	384,000	-100%
TEXAS	0	0	NA	288,000	-100%
CALIFORNIA	0	0	NA	0	NA
OKLAHOMA	0	0	NA	0	NA
MICHIGAN	0	0	NA	0	NA
NORTH CAROLINA	0	0	NA	0	NA
DELAWARE	0	0	NA	0	NA
INDIANA	0	0	NA	0	NA
VIRGINIA	0	0	NA	0	NA
MARYLAND	0	0	NA	0	NA
CANADA	0	0	NA	0	NA
MISSOURI	0	0	NA	0	NA
SOUTH CAROLINA	0	0	NA	0	NA
PANAMA	0	0	NA	0	NA
MISSISSIPPI	0	0	NA	0	NA
GEORGIA	0	0	NA	0	NA
FLORIDA	0	0	NA	0	NA
COSTA RICA	0	0	NA	0	NA
ARIZONA	0	0	NA	0	NA
ALABAMA	0	0	NA	0	NA
Total	120,951,973	118,700,000	1.9%	119,186,000	1.5%

Last 30 Days Movement:

- Mexico 8% below 2023, 15% below average
- Guatemala 34% above 2023, 92% above average
- Brazil well above 2023 and average
- Dom. Rep. 1% below 2023, 12% above average

Year to Date Movement:

- Mexico 7% below 2023, 1% below average
- Florida 14% below 2023, 7% below average
- Georgia 6% above 2023, 1% above average
- California 15% below 2023, 12% above average
- Indiana 6% above 2023, 16% above average
- Texas 24% below 2023, 32% below average
- Guatemala 25% above 2023, 60% above average
- Arizona 53% above 2023, 76% above average
- Delaware 20% above 2023, 31% above average
- N. Carolina 37% below 2023, 15% below average
- Missouri 27% below 2023, 12% below average
- Michigan 6% above 2023, 13% above average
- S. Carolina 12% above 2023, 3% below average
- Maryland 11% below 2023, 1% below average
- Honduras 37% below 2023, 42% below average
- Costa Rica 45% above 2023, 61% above average
- Virginia 5% above 2023, 7% below average
- Dom. Rep. 16% above 2023, well above average

Region	To Date				
	2024	2023	2024 v 23	2019 - 23 Avg	2024 v Avg
MEXICO	1,559,003,742	1,675,510,000	-7%	1,582,186,000	-1%
FLORIDA	903,244,000	1,045,140,000	-14%	975,010,000	-7%
GEORGIA	658,388,000	620,600,000	6%	654,112,000	1%
CALIFORNIA	542,906,550	634,980,000	-15%	485,386,000	12%
INDIANA	453,965,200	426,400,000	6%	392,500,000	16%
TEXAS	311,218,100	410,870,000	-24%	457,928,000	-32%
GUATEMALA	248,647,257	199,600,000	25%	155,476,000	60%
ARIZONA	244,943,247	159,950,000	53%	139,526,000	76%
DELAWARE	177,520,000	147,420,000	20%	135,006,000	31%
NORTH CAROLINA	175,207,000	277,490,000	-37%	207,300,000	-15%
MISSOURI	128,448,800	175,990,000	-27%	145,384,000	-12%
MICHIGAN	126,496,000	119,720,000	6%	111,578,000	13%
SOUTH CAROLINA	95,340,000	85,340,000	12%	98,134,000	-3%
MARYLAND	81,580,000	91,640,000	-11%	82,368,000	-1%
HONDURAS	43,078,848	68,780,000	-37%	74,012,000	-42%
COSTA RICA	25,508,268	17,620,000	45%	15,892,000	61%
VIRGINIA	14,600,000	13,840,000	5%	15,740,000	-7%
DOM. REP.	4,370,638	3,760,000	16%	1,494,000	193%
CANADA	3,200,180	1,180,000	171%	1,378,000	132%
BRAZIL	2,338,859	2,900,000	-19%	1,800,000	30%
PANAMA	1,519,767	6,680,000	-77%	3,612,000	-58%
OKLAHOMA	0	3,720,000	-100%	12,214,000	-100%
ALABAMA	0	0	NA	8,756,000	-100%
MISSISSIPPI	0	0	NA	3,968,000	-100%
Total	5,801,524,456	6,189,130,000	-6.3%	5,760,760,000	0.7%

Seedless FOB Pricing

- Strong through May, gap slimmed in June, went below average second half of July through mid-September, strong finish

Seedless FOB	2024	2023	2019—23
Last 7 Days	\$0.524	\$0.387	\$0.358
Last 30 Days	\$0.532	\$0.343	\$0.331
Year to Date	\$0.259	\$0.284	\$0.234

