December 3, 2025

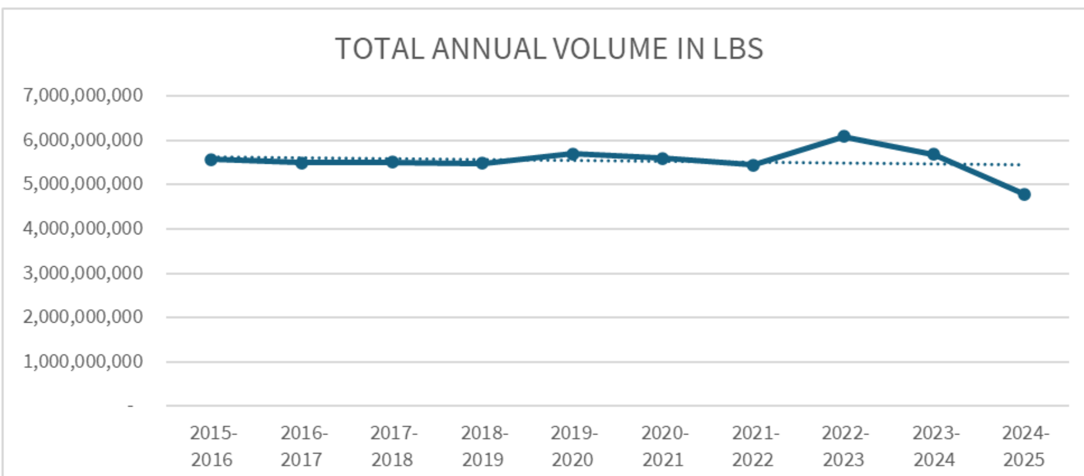
U.S. WATERMELON MARKET ANNUAL REPORT 2025

Watermelons in the United States market have had a complicated scenario in the last three years, as their volume has contracted significantly. Likewise, the market has not grown in the last ten years, which speaks of a product that is losing positioning among consumers who are opting for other options, as the fresh food market is becoming more competitive every day.

This report contemplates the movements of the watermelon market between December 1st, 2024 and November 30th, 2025, thus achieving twelve-month periods comparable to previous years up to 10 years of history.

10-YEAR MARKET TREND

GRAPH OF TOTAL ANNUAL VOLUME BETWEEN 2016 AND 2025 IN LBS



It is evident that between 2016 and 2022 the watermelon market was practically unchanged, as there was no evident increase in volume, which indicates that the consumption of this fruit did not increase during those years. The inertia was broken when strong growth was recorded in 2023, however, this was not enough to reactivate the market.

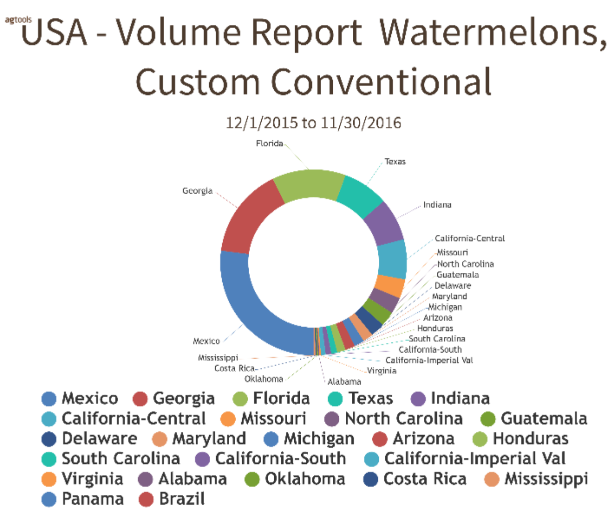
TOTAL ANNUAL VOLUME BETWEEN 2016 AND 2025			
PERIOD	**VOLUME LBS**	**GROWTH LBS**	**GROWTH %**
2015-2016	5,568,952,289		
2016-2017	5,497,021,422	(71,930,867)	-1.3%
2017-2018	5,512,448,391	15,426,969	0.3%
2018-2019	5,486,308,794	(26,139,597)	-0.5%
2019-2020	5,695,008,541	208,699,747	3.8%
2020-2021	5,601,403,937	(93,604,604)	-1.6%
2021-2022	5,451,427,842	(149,976,095)	-2.7%
2022-2023	6,088,038,543	636,610,701	11.7%
2023-2024	5,692,229,718	(395,808,825)	-6.5%
2024-2025	4,789,067,686	(903,162,032)	-15.9%
AVERAGE ANNUAL GROWTH			**-1.40%**

Between 2016 and 2022 the volume fluctuated between 5.48 and 5.69 billion lbs. with a maximum variation of 3.8%, so it could be said that the market was in some stability. In 2023, the total reached 6.088 billion lbs., breaking the trend and reaching 11.7%, which seemed to indicate an awakening in demand, however, for the 2024 season again a sharp contraction of more than 6.5% was recorded. Already for the 2025 season the volume has fallen drastically. Almost 16% less than the previous season, reaching 4.789 billion lbs. The lowest volume of the decade. This indicates a market in recession.

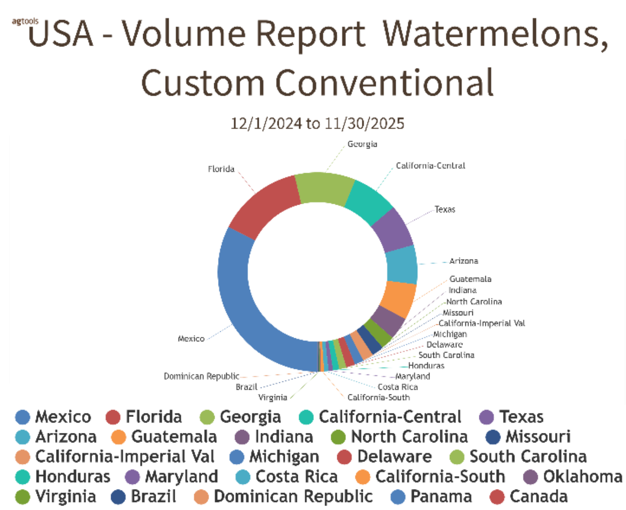
As a result of these movements, the total market registered an average annual decrease of 1.4%, which indicates that this fruit has not been able to position itself in the priorities of consumers.

PURCHASING OF SUPPLIER REGIONS BETWEEN 2016 AND 2025

2016



2025

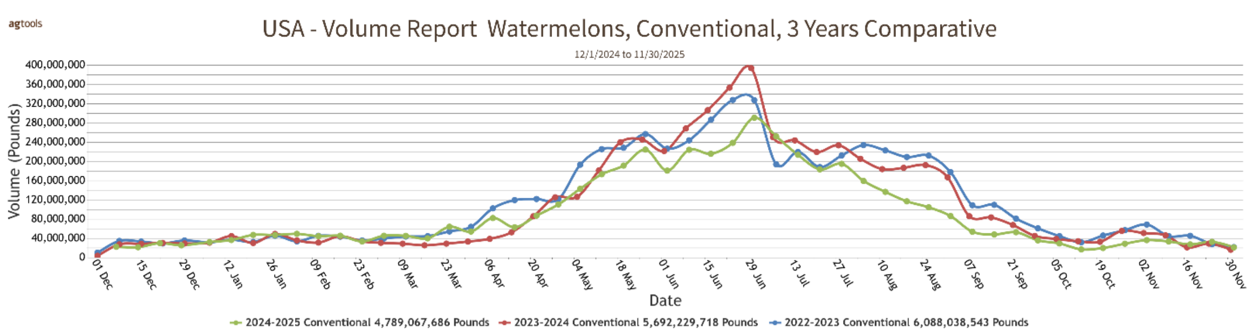


In 2016, the fruit was supplied from 24 different regions throughout the year, with a very fragmented market with important regions, but dominated by Mexico, Georgia and Florida, with these three regions covering more than 55% of the annual needs of the market. By 2025, 24 regions continue to supply the market, but the distribution of the market has changed. Mexico has grown significantly, Georgia has fallen to third place and Florida has advanced to second place with practically the same volume contributed. In the rest of the regions there have also been changes, but with less impact on the total market.

GROWTH COMPARATIVE OF WATERMELONS OF MAIN REGIONS IN 10 YEARS							
REGION	**PERIOD 2015-2016**	**MARKET SHARE %**	**PERIOD 2024-2025**	**MARKET SHARE %**	**VARIATION IN LBS IN 10 YEARS**	**GROWTH IN 10 YEARS**	**VARIATION OF MARKET SHARE**
Mexico	1,506,121,753	27.0%	1,554,176,565	32.5%	48,054,812	3.2%	5.4%
Florida	711,199,510	12.8%	661,930,220	13.8%	(49,269,290)	-6.9%	1.1%
Georgia	877,957,340	15.8%	474,561,825	9.9%	(403,395,515)	-45.9%	-5.9%
Central California	388,119,660	7.0%	360,966,900	7.5%	(27,152,760)	-7.0%	0.6%
Texas	442,378,550	7.9%	329,850,000	6.9%	(112,528,550)	-25.4%	-1.1%
Arizona	93,876,150	1.7%	305,746,200	6.4%	211,870,050	225.7%	4.7%
Guatemala	143,349,409	2.6%	280,375,670	5.9%	137,026,261	95.6%	3.3%
Rest of the regions	1,405,949,917	25.2%	821,460,306	17.2%	(584,489,611)	-41.6%	-8.1%
TOTAL (Lbs)	**5,568,952,289**	**100.0%**	**4,789,067,686**	**100.0%**	**(779,884,603)**	**-14.0%**	

Between 2016 and 2025 the total volume fell by 779 million lbs., which represents 14.0% less than in 2016. The region that has lost the most volume in these years is Georgia, which fell more than 403 million lbs. Arizona is the region that has had the greatest increase, as its contribution grew by 211 million lbs. Small regions that contribute more than 25% fell 584 million lbs., 41.6% less volume.

3-YEAR COMPARISON OF WATERMELON ANNUAL VOLUME



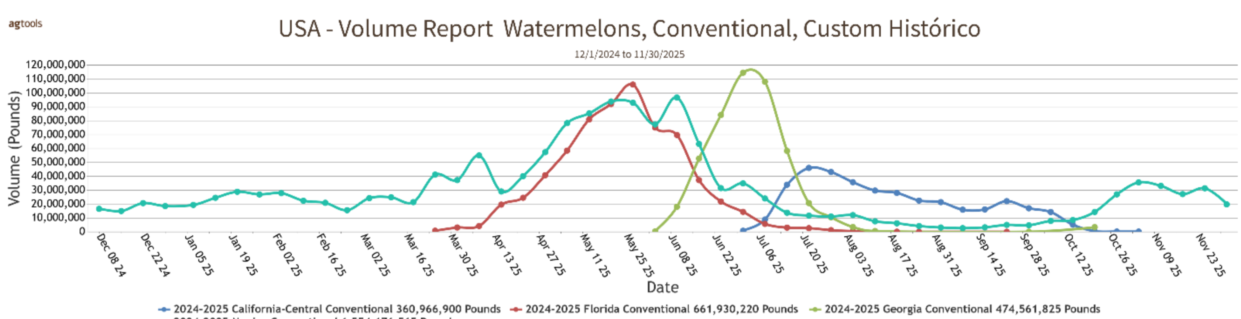
In the graph you can see that this fruit is available all year round, although the strong season runs from March to October, reaching its highest level in June. In the last three years, we can observe that there has been a pronounced negative trend, as the total annual volume fell from 6.088 billion lbs. in 2023 to 5.692 billion lbs. in 2024 and to 4.789 billion lbs. in 2025. It should be remembered that the volume of 2023 was the highest level reached in the entire decade, but the fall since that point has been very rapid and to levels below the level it had 10 years ago.

MARKET DISTRIBUTION BY SUPPLIER REGIONS

GROWTH COMPARATIVE BY REGION BETWEEN DECEMBER 1ST 2024 AND NOVEMBER 30TH 2025						
REGION	**2024-2025**	**MARKET SHARE %**	**VAR LBS**	**VAR %**	**2023-2024**	**MARKET SHARE %**
Mexico	1,554,176,565	32.5%	26,531,410	1.7%	1,527,645,155	26.8%
Florida	661,930,220	13.8%	(241,313,780)	-26.7%	903,244,000	15.9%
Georgia	474,561,825	9.9%	(183,826,175)	-27.9%	658,388,000	11.6%
Central California	360,966,900	7.5%	(118,407,050)	-24.7%	479,373,950	8.4%
Texas	329,850,000	6.9%	18,631,900	6.0%	311,218,100	5.5%
Arizona	305,746,200	6.4%	64,253,528	26.6%	241,492,672	4.2%
Guatemala	280,375,670	5.9%	70,892,188	33.8%	209,483,482	3.7%
Indiana	174,458,775	3.6%	(279,506,425)	-61.6%	453,965,200	8.0%
North Carolina	105,935,200	2.2%	(69,271,800)	-39.5%	175,207,000	3.1%
Missouri	93,711,670	2.0%	(34,737,130)	-27.0%	128,448,800	2.3%
California Imperial Valley	84,450,000	1.8%	35,559,900	72.7%	48,890,100	0.9%
Michigan	70,412,975	1.5%	(56,083,025)	-44.3%	126,496,000	2.2%
Delaware	69,066,930	1.4%	(108,453,070)	-61.1%	177,520,000	3.1%
South Carolina	55,891,600	1.2%	(39,448,400)	-41.4%	95,340,000	1.7%
Honduras	48,567,537	1.0%	25,406,071	109.7%	23,161,466	0.4%
Rest of the regions	118,965,619	2.5%	(13,390,174)	-10.1%	132,355,793	2.3%
TOTAL (Lbs)	**4,789,067,686**	**100.0%**	**(903,162,032)**	**-15.9%**	**5,692,229,718**	**100.0%**

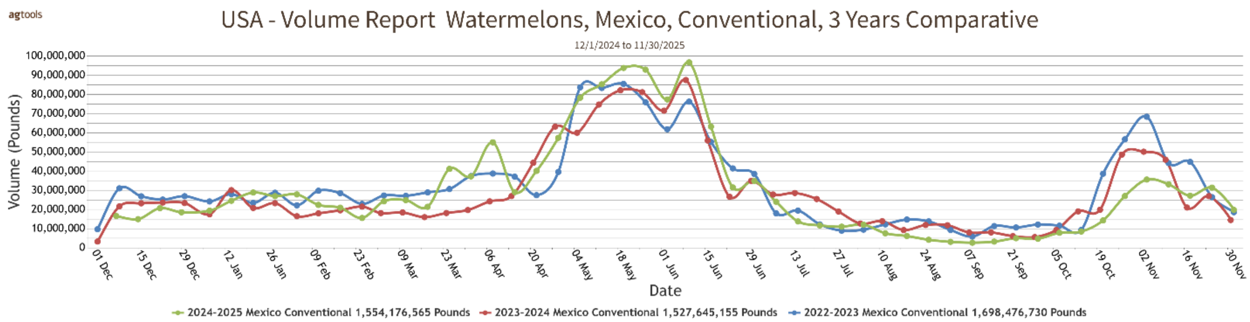
As mentioned above, the volume of the year 2025 reached 4.789 billion lbs., which represented a decline of more than 903 million lbs. compared to the previous year, a contraction of 15.9%, where the regions that most affected this result were Florida, Georgia, central California and especially Indiana. Mexico, being the most important region, had a positive result, as did Texas, Arizona and Guatemala. It can also be seen that there are several regions with small shares, since the supply is very fragmented.

ANNUAL VOLUME OF THE FOUR MAIN SUPPLIER REGIONS



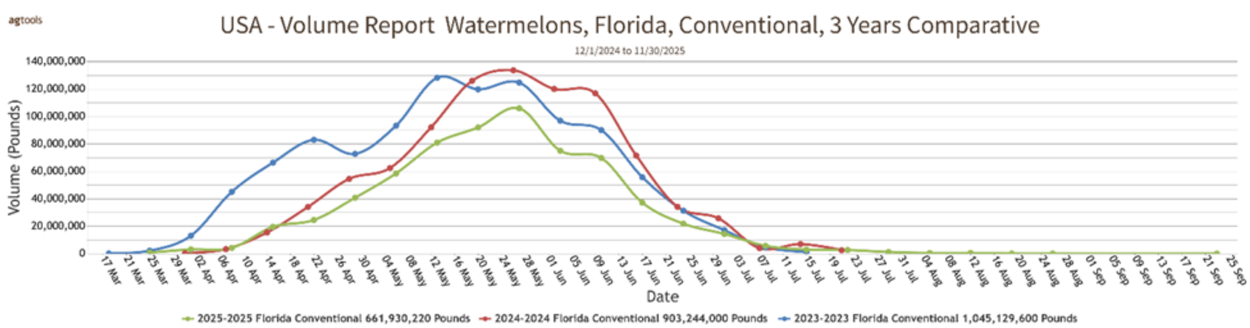
In the graph you can see that Mexico is the only region that has a presence in the market all year round, its highest level is presented in the month of May. Florida supplies the market in the months of March through August. Georgia has a large volume in a very short season, as it is only present between June and August. Central California has a smaller peak, but with more weeks of presence in the market. Its volume runs from July to October. With this you can see that the season of strong volume occurs in the summer months.

3-YEAR VOLUME COMPARISION OF MEXICO'S WATERMELON IN THE UNITED STATES



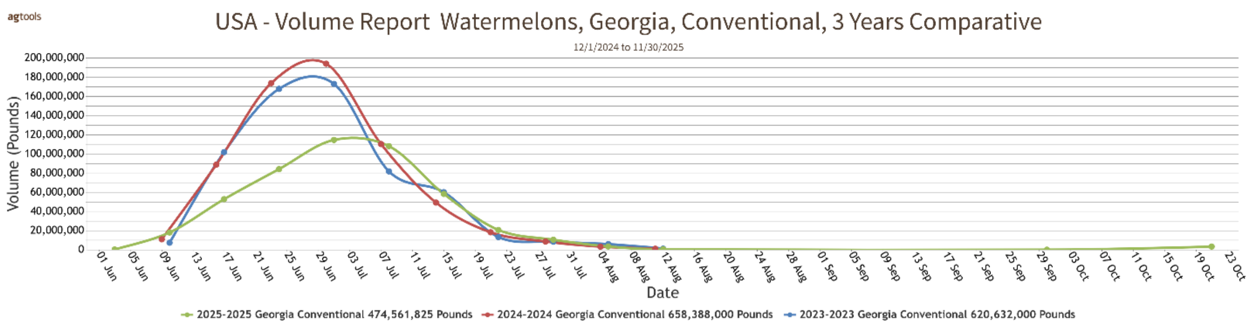
It can be seen that Mexico has two production peaks throughout the year, the first and strongest, between the months of April and June and the second between October and November, although the latter has a much smaller volume. It can be said that this region has shown some stability in the last three years, since in 2023 the volume reached 1.698 million lbs., and although by 2024 this fell to 1.527 million lbs., by the 2025 season, it had a recovery of 1.7%, reaching 1.554 million lbs., which contrasts with the result of the total market.

3-YEAR VOLUME COMPARISION OF FLORIDA WATERMELON IN THE UNITED STATES



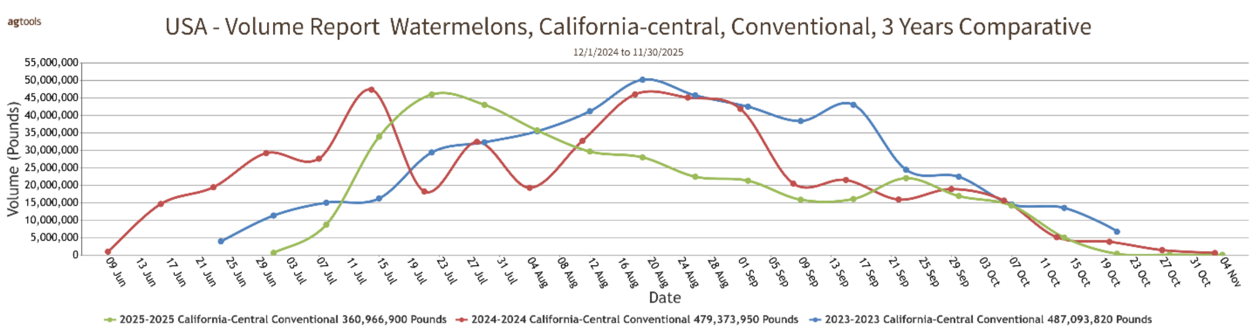
Florida has a very short season that runs from April to June. The behavior of this region is aligned with the total market, as in the last three years it has shown significant decreases and has fallen from a volume of 1.045 million lbs. in 2023 to 661 million lbs. in 2025, a loss of more than 36% in just two years.

3-YEAR VOLUME COMPARISION OF GEORGIA WATERMELON IN THE UNITED STATES



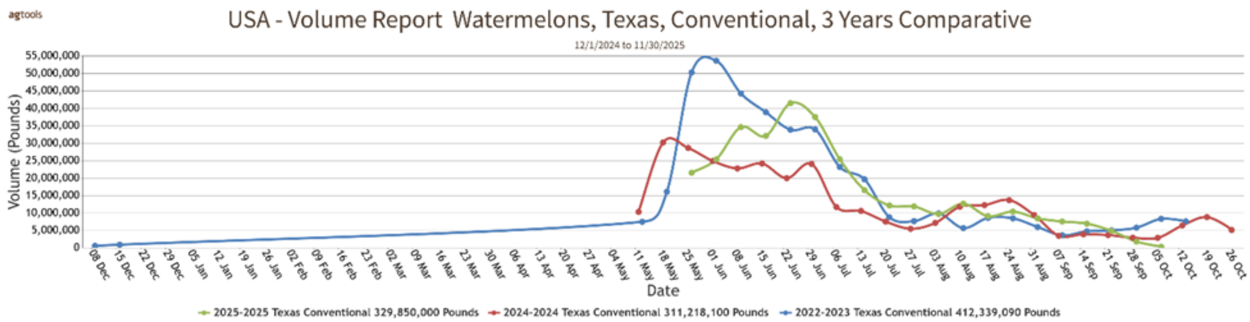
The region of Georgia went from being the second supplier in 2016 to the third position in 2025. In those years it reduced its volume by more than 45%. In the last three years, Georgia is one of the regions that has had mixed results, as in 2023 it reached 620 million lbs. For the year 2024 it had a slight growth, reaching 658 million lbs. However, for this year it could not keep up and the result was 474 million lbs., a drop of 27.9%

3-YEAR VOLUME COMPARISION OF CENTRAL CALIFORNIA WATERMELON IN THE UNITED STATES



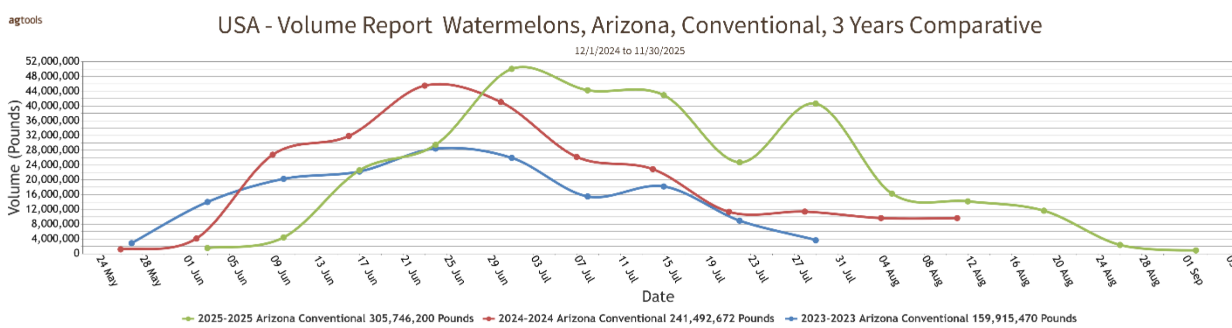
Central California, like the market as a whole, has had a negative trend in the last three years and this has worsened in the year 2025. Its season runs from June to October, presenting its greatest potential in the month of August, however, in 2025 it behaved very differently, as its highest volume occurred in the month of July and from then on it had a negative trend week by week, which caused the result of a decrease of 24%

3-YEAR VOLUME COMPARISION OF TEXAS WATERMELON IN THE UNITED STATES



Texas is a region that has a very particular season. It begins in May and ends in October, but its maximum volume is reached a few weeks after starting and then it goes down and remains low for most of the season. In 2025 it achieved an interesting growth of 6% because despite not being so large, it contrasts sharply with the results of other larger regions. This could indicate a change in the trend of production in this region, which will be seen in the coming years.

3-YEAR VOLUME COMPARISION OF ARIZONA WATERMELON IN THE UNITED STATES

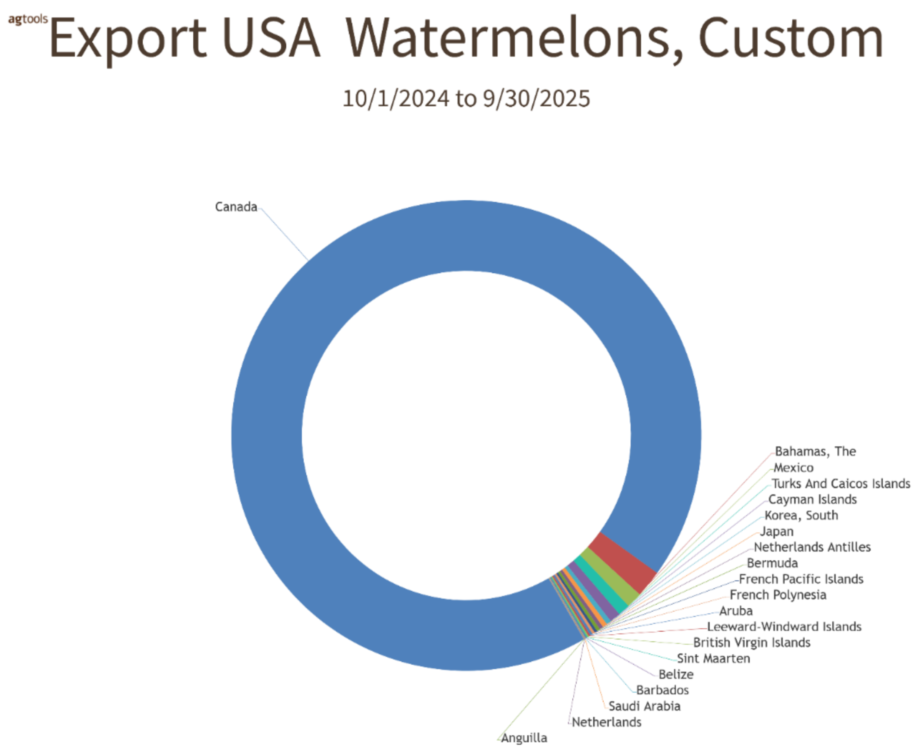


Arizona is the 6th most important region. Its market share is 6.4% despite having a relatively short season from May to August, however, in 2025 production started late, but it achieved the highest volume week of the three years in July and from there it continued with strong volume, managing to extend production until September, resulting in an annual growth of more than 26%, the best of the most important regions. It will be important to review the behavior of this region in the coming years.

WATERMELON EXPORTS FROM THE UNITED STATES

The United States is not only a consumer of watermelons. It also has exports of this fruit and between October 2024 and September 2025 it had shipments to 25 different destinations. Even though it is not a fruit that has a growing market, the variety of destinations indicates that it may have potential to grow.

DISTRIBUTION OF DESTINATIONS OF WATERMELON EXPORTS FROM UNITED STATES BETWEEN OCTOBER 2024 AND SEPTEMBER 2025



Considering exports as value and not in quantity, Canada is the main destination for watermelons from the United States, receiving 93.3% of the total, Bahamas 1.88%, Mexico 1.0% and the remaining almost 4% is distributed in the rest of the regions. It is worth mentioning that these exports include both fresh and processed fruit in any of its presentations.

10 MAIN DESTINATIONS OF WATERMELON EXPORTS		
REGION	**VALUE (USD)**	**LBS**
Canada	$ 76,195,700	345,396,849
Bahamas	$ 1,532,370	4,452,569
Mexico	$ 886,303	3,001,345
Turks and Caicos Islands	$ 679,769	1,318,007
Cayman Islands	$ 611,138	1,281,430
South Korea	$ 273,136	788,323
Japan	$ 267,164	945,821
Netherlands Antilles	$ 212,089	395,974
Bermudas	$ 188,163	244,915
French Pacific Islands	$ 147,715	262,175

This graph shows the important impact of exports to Canada, as it revives more than 76 million dollars a year.

As observed in this report, the watermelon market in the last decade went through three stages, seven years of relative stability, then a year of explosive growth, which could not be maintained and in the last two years a strong negative trend to reach the lowest level of traded volume in the decade by 2025. It will be important to review production projections for 2026 as this trend indicates that farmers are abandoning this crop to dedicate themselves to other possibly more profitable products.

Another important issue to review is the changes that have taken place in demographics, since this fruit is of large volume and now the family nuclei are smaller, so it would be important to review options to meet the demand with smaller portions.

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