

The European market potential for watermelons

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Watermelons are mostly found in Europe during the warmer months, from spring to autumn. People enjoy eating them as a refreshing snack or using them in fruit salads, smoothies and desserts. They are also popular at picnics and barbecues due to their high water content, keeping you hydrated on hot days. There is also an off-season demand for watermelon (in winter or at the very beginning of spring). Although this is limited, it also offers an opportunity in certain European markets. The European watermelon market is steadily growing and is expected to continue growing in the upcoming years, especially with the rise in temperatures during spring and autumn. Spain, Italy and Greece are Europe's main watermelon producers.

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1. Product description

Watermelons (scientific name: *Citrullus lanatus*) are part of the Cucurbitaceae family. They are big, usually round or oval, with a thick green rind that has light or dark stripes. However, there is a wide range of varieties – each with its own features in terms of size, shape, colour, flavour and texture. The flesh can be red, yellow, orange or even white, depending on the variety. Watermelons are categorised under HS code 08 07 11 00 in the Harmonised System.

The varieties most commonly available on the European markets are:

1. **Sugar Baby:** These watermelons are smaller in size compared to other varieties, making them ideal for individual servings. They have a round shape and a dark green rind with thin, dark stripes. Inside, the flesh is deep red, sweet and very juicy. Sugar Baby watermelons are often chosen for their compact size and intense sweetness.
2. **Jubilee:** These watermelons are large and oval-shaped, with a thick, green rind and light green stripes. Inside, the flesh is deep red, sweet and very juicy. This variety is known for its excellent flavour and is often chosen for its large size, making it suitable for sharing at gatherings.
3. **Crimson Sweet:** This variety is known for its large size and deep red, juicy flesh. It typically has a thick rind with light green stripes. Crimson Sweet watermelons are prized for their high sugar content and sweet flavour, making them popular for fresh consumption and fruit salads.

Figure 1: Sugar Baby (1), Jubilee (2), Crimson Sweet (3), Cream of Saskatchewan (4), Yellow Crimson (5) and Orangeglo (6)



Sources: Amazon (1,3 and 5); Burrell Seeds via Wikimedia Commons (2); Kokopelli semences via Wikimedia Commons (4), Star Bros via Wikimedia Commons (6)

Other species can also be found on markets:

1. Cream of Saskatchewan: This variety is known for its creamy white flesh and sweet flavour. It has a thin rind and crisp texture, making it refreshing to eat. Cream of Saskatchewan watermelons typically have a round to oval shape and are well-suited for cooler climates.
2. Yellow Crimson: Similar in appearance to the Crimson Sweet, the Yellow Crimson variety stands out due to its yellow flesh instead of the traditional red. It has a sweet, tropical flavour with a hint of citrus. Yellow Crimson watermelons often have a milder taste than the red-fleshed ones.
3. Orangeglo: These watermelons are known for their bright orange flesh, which sets them apart from other varieties. They have a sweet, tropical flavour with hints of honey and citrus. Orangeglo watermelons often have a milder taste than red-fleshed varieties, making them a popular choice for those who prefer a less intense flavour.
4. There are also some seedless varieties, such as Crimson Sweet seedless and Jubilee seedless.

2. What makes Europe an interesting market for watermelons?

The European watermelon market is mainly a seasonal one. The demand for watermelons is at its peak during spring and summer when temperatures are highest.

A strong demand that relies on imports

Despite Europe's strong production of watermelons (almost 3 million tonnes in 2023), the European market still relies heavily on imports to meet its needs. Over the past five years, volumes of watermelon imports have risen steadily, from 428,000 tonnes in 2019 to 496,000 tonnes in 2023. This is an increase of almost 16%. The watermelon market continues to develop thanks to the wide range of varieties marketed.

Watermelons are widely offered on major markets in Europe, but they can also be found in niche markets,

organic markets and speciality product markets. As watermelon comes in various types and can be used in different ways, it appeals to both broad and specialised market sectors, allowing producers and retailers to target a diverse variety of consumers.

Source: Eurostat 2023

A steady rise in the cost (CIF) of watermelon imports

Over the past five years, the cost of watermelons imported from third countries has continuously increased.

As a supplier of watermelons to the European market, you must bear in mind that it is a very competitive and selective market. If you target a speciality market, your products will need to be of optimum quality to allow you to gain market shares. European buyers' interest in organic products continues to rise and this is a way for you to establish yourself on this very selective market. Varieties with flesh colours other than red, as well as seedless ones, can also be a way for you to stand out from what is already available in mainstream markets.

Watermelons are mainly imported into Europe by sea or by road, which are both very cost-effective means of transportation. The average cost of a tonne of watermelon imported from non-European countries has steadily risen since 2019. In 2019, the average cost (Cost, Insurance and Freight – CIF) of a tonne of watermelon was €546/tonne. In 2023, this cost was €714/tonne, which represents an increase of a little more than 30% (see Figure 3).

Source: Eurostat 2023

Complementary imports mainly come from Africa

Watermelon production is seasonal in Europe. In general, the first European fruits from open-air production go on sale in May/June. Imports of watermelons from other regions start at the beginning of April, or even at the end of March. Thanks to production in greenhouses, some European countries are starting their watermelon campaigns earlier and earlier (mid-April for Spain and late April for Italy).

The main imports of watermelons outside the European Union come from Africa (mainly Morocco), followed by Latin America (mainly Costa Rica) and finally the Middle East (mainly Turkey).

In 2023, the European market imported 50% of its additional volumes of watermelons from Africa, 20% from Latin America and 15% from the Middle East.

Source: Eurostat 2023

Sea freight is the most cost-effective transport for watermelons

Watermelons are bulky and heavy, therefore sea transport is the most cost-effective method for delivering them to the European market. Some watermelons from places like Morocco are transported by road due to the relatively short distance. Watermelons have a reasonably short shelf life of 2 to 3 weeks after harvest, and even less (3 to 4 days) for freshly cut ones in supermarkets. Sea transport allows large volumes to be shipped, reducing their unit cost.

Sea transport is also a relatively sustainable way to export large volumes of watermelons, as it produces lower carbon emissions than air transport.

Tips:

Be sure to harvest your watermelons at the right time, when they are fully ripe but not overripe. Watermelons harvested overripe are more prone to spoilage and have a shorter shelf life.

Handle your watermelons gently to limit external as well as internal bruising and ensure that the fruits are of optimal quality. Although they have a thick rind, watermelons are very sensitive to shocks and bad handling practices.

Avoid storing watermelons with fruits that produce ethylene, to prevent accelerated ripening and spoilage. Watermelons are climacteric fruits (fruits that continue to ripen after being separated from the plant) that are very sensitive to ethylene exposure.

Target the early season (spring) to market your watermelons. When possible, avoid exporting them during summer, when Europe's production is at its highest.

3. Which European countries offer the most opportunities for watermelons?

Although European watermelon production is seasonal, it is nonetheless significant (nearly 3 million tonnes produced in 2023). Supermarkets are therefore still the main channel for marketing such large volumes.

However, European production is not enough to cover the natural market demand, which is why Europe depends to a large extent on imports to supplement its supply. The main European countries that import watermelons from outside the European Union are France, the Netherlands, Spain, the United Kingdom and Bulgaria. However, we must also mention the German market, which remains the leading destination market for intra-European imports, even if it only imports very limited volumes from non-European countries.

Due to the effects of global warming, it is expected that the demand for watermelons will continue to increase in the coming years. In the short term (1-3 years), there will be a growing demand for organic products. European consumers are interested in consuming healthy crops that are grown with minimal use of chemicals, and they are willing to pay more for such products. In addition, European buyers are likely to continue to be attracted to Fairtrade-certified crops, as they highlight small-scale productions.

In the long term (beyond 3 years), the European market is likely to place more emphasis on environmental and sustainability issues in agriculture. For instance, the way watermelons are grown and managed in terms of water resources will become crucial in marketing watermelons from non-European countries.

Source: Eurostat/Fruitrop 2023

France is the leading market in terms of direct watermelon imports

In 2023, France was the leading importer of watermelons from non-European countries. Its direct imports of watermelons were slightly above 146,000 tonnes, accounting for 29% of the volumes imported directly by European countries.

Over the last five years, France has been the most dynamic market in terms of direct watermelon imports. During this period, its imports increased by more than 111%, from 69,000 tonnes imported in 2019 to more

than 146,000 tonnes in 2023.

Source: Eurostat/Fruitrop 2023

In 2023, French imports of watermelons came mainly from Morocco (88%) and Mauritania (18%).

In France, supermarkets play a key role in the marketing of watermelons. During the high season, they organise numerous promotions of the fruit. When local production is more available, French consumers tend to choose locally produced watermelons. Mainly to support local farmers, but also because they are increasingly sensitive to environmental issues, preferring short marketing channels. Moroccan watermelons are mainly available at the beginning of the season, from April to June, before the arrival of French production (from mid-June).

With summers getting hotter and hotter, the demand for watermelons, a very refreshing fruit, will likely continue to grow. French consumers tend to prefer seedless varieties, which are easier to eat. These varieties are often more expensive. Importers expect French imports of watermelons to continue to increase slightly over the next three years.

There is a growing demand for organic fruits on the French market. Supplying organic watermelons could help you achieve premium prices and supply the organic market, which is a niche market.

Tips:

If possible, start your watermelon marketing before the French season begins or when watermelons produced in France are less available.

Do not hesitate to supply 'speciality varieties' (flesh colour different from red, or seedless varieties). Discuss your specific offer with different wholesalers and importers in France.

The Dutch market has a regular and diversified supply

The Netherlands is the second-largest importer of watermelons. In 2023, the Dutch market accounted for 23% of Europe's direct imports of watermelons. Unlike the French market, whose imports have sharply risen over the past five years, Dutch imports have always been consistent, fluctuating between 114,000 tonnes and 120,000 tonnes depending on the season and supply.

The Netherlands plays a key role in the marketing of fruits in Europe in general. Due to its unique infrastructures, it acts as a hub country that imports and re-exports products to other destinations. If you export to the Netherlands, your Dutch importer will most likely request that you comply with the basic common traceability procedures. For example, you could be asked to complete your GLOBALG.A.P. certificate before supplying to this market. This will allow your importer to easily re-export your goods to other European buyers.

Source: Eurostat/Fruitrop 2023

In 2023, the Netherlands mainly imported watermelons from four origins: Brazil (48%), Costa Rica (26%), Morocco (12%) and Panama (7%). Together, Latin American origins accounted for 81% of the volumes of watermelons imported directly into the Netherlands.

As a hub country, the Netherlands will continue to play a leading role in supplying other European markets as

exports grow.

Tip:

Make sure to have a GLOBALG.A.P. certification. Being certified will give you better chances of supplying this important 'hub' market.

Spain is an active market despite having its own large watermelon production

Spain is the third-largest watermelon import market in Europe. In 2023, Spain imported just over 112,000 tonnes of watermelon, representing over 22% of direct watermelon imports.

The Spanish market is characterised by a large production and a strong local demand. Spain is one of Europe's leading watermelon producers. It is an export-oriented market, yet it still imports quite a lot. Over the last five years, imports of watermelons from outside Europe have risen by 51%, from 74,000 tonnes in 2019 to more than 112,000 tonnes in 2023.

Source: Eurostat/Fruitrop 2023

In 2023, Spanish imports of watermelons mainly came from Morocco (69%), Senegal (17%) and Mauritania (10%). The short distance between Morocco and Spain also allows for transport by road. These volumes are mostly re-exported to other European countries.

In Spain, supermarkets play a key role in the marketing of watermelons. During the high season (May to September), they organise numerous promotions of the fruit.

Because Spanish production is mainly export-oriented, producers adhere to very strict quality standards. Spanish watermelon production is known for its high level of competitiveness. Spanish watermelons are often offered at very competitive prices, which allows them to be present in many European markets.

United Kingdom, a growing market for direct imports

The United Kingdom is the fourth-largest watermelon import market in Europe. In 2023, the United Kingdom imported around 75,000 tonnes of watermelon, representing about 15% of European direct watermelon imports.

The British market shows a growing demand for watermelons. Unlike the top three markets, its production is rather limited compared to the local demand, making it a more import-dependent market. Over the last five years, imports of watermelons from outside Europe have risen by 21%, from 62,000 tonnes in 2019 to more than 75,000 tonnes in 2023.

Source: Eurostat/Fruitrop 2023

In 2023, the United Kingdom's direct imports of watermelons mainly came from Brazil (53%), Morocco (20%), Costa Rica (15%) and Panama (6%). Because of its geographic position, the United Kingdom heavily relies on

sea freight for its supplies, even if some imports are also done by road.

Supermarkets play a major role in the marketing of fruits in the United Kingdom. They are also sold in grocery stores and on street markets. British buyers are very strict about quality standards. You must comply with these standards if you want to export to the United Kingdom. Therefore, GLOBALG.A.P. certification is the minimum requirement to supply this market. If you try to supply to supermarkets or to large retailers that supply to supermarkets in the United Kingdom, you will also be asked to show social, ethical or even environmental certifications.

Tip:

Consider applying for ethical, social or environmental certifications to open doors to new markets for your watermelon production. The British market is very selective and competitive.

Bulgaria, growing direct imports of watermelons.

In 2023, Bulgaria was the fifth-largest direct importer of watermelons, amounting to 3% of the direct watermelon imports into Europe. Over the last five years, Bulgaria's watermelon market has shown progressive growth. It increased by more than 78%, from 9,000 tonnes imported directly in 2019 to over 17,000 tonnes in 2023.

Source: Eurostat/Fruitrop 2023

In 2023, direct imports of watermelons into Bulgaria came mainly from Turkey (93%) and Iran (2%). Thanks to the land border it shares with Turkey, watermelon imports from the Middle East are almost exclusively by land. Due to the dominant regional supply, other nearby producing countries have the best chances to compete with Turkey.

Although Bulgaria has a dynamic watermelon production (mainly from June to August), it also relies on imports to meet its needs. Bulgaria also plays a role in the European watermelon trade, as part of its over-land imports are re-exported to other European destinations.

The European watermelon market is heavily dependent on intra-state trade

The European market relies heavily on intra-European trade to satisfy its demand for watermelons. In 2023, European countries produced almost 3 million tonnes of watermelons and imported almost 500,000 tonnes from various origins. Volumes imported directly by certain countries can be re-exported in the same way as locally produced watermelons. In 2023, more than 1.3 million tonnes of watermelon were traded between European countries.

Source: Eurostat/Fruitrop 2023

In 2023, Spain accounted for 42% of intra-state trade, by exporting over 565,000 tonnes of watermelons to other European countries. Italy followed with 18% and Greece with 9%.

4. Which trends offer opportunities or pose threats in the European watermelon market?

The European watermelon market is growing. The demand suggests that imports will continue to grow. As a supplier to this market, you need to look for certain opportunities that may offer a niche for you, but you also need to be aware of the possible difficulties that are involved in an expanding market.

An increasing demand for fresh-cut watermelons

In Europe, demand is increasingly focused on the practicality of certain products. Watermelons, because of their size, are not necessarily practical for many consumers. The niche market for ready-to-eat freshly cut pieces of watermelon and prepared fruit salads is becoming an increasingly important part of watermelon sales. Freshly cut watermelon pieces in boxes or trays are an interesting way for supermarkets to promote different varieties, as they can also be mixed with other fruits in salads. Fresh cuts are sold by various supermarkets in Europe (Carrefour, Cora, Delhaize, [Tesco](#), [Albert Heijn](#)). This has proved effective in boosting sales, as consumers do not necessarily want to buy a whole watermelon or have to cut it up and store it in their fridge.

As demand for organic products increases, the fresh cut segment is expected to grow considerably over the next three to five years.

As a third-country supplier, offering organic-certified watermelons can help you access this niche market to boost your exports.

Figure 12: Fresh cut watermelon in a French supermarket (Cora)



Source: Photo by Thierry Paqui

Sustainability of watermelon supplies

European consumers are increasingly concerned about sustainability and environmental impact. In Europe, watermelon producers and suppliers who use sustainable farming practices and minimise packaging can attract environmentally conscious consumers and gain a competitive edge in the market. This is all the more true given the scale of watermelon production in Europe and the fierce competition between suppliers.

There are increasing concerns about water resources, deforestation and supply chain transparency in watermelon production. These concerns affect European production but also that of third countries, such as Morocco, Senegal or Costa Rica. Because watermelons are a popular fruit in health food media, especially during the summer, negative attention can circulate widely in the public sphere. Although it has had little impact on general consumption so far, it can influence sourcing preferences. Marketers of watermelons will have to prove to consumers that their products are produced sustainably – this is a tendency that has become strong.

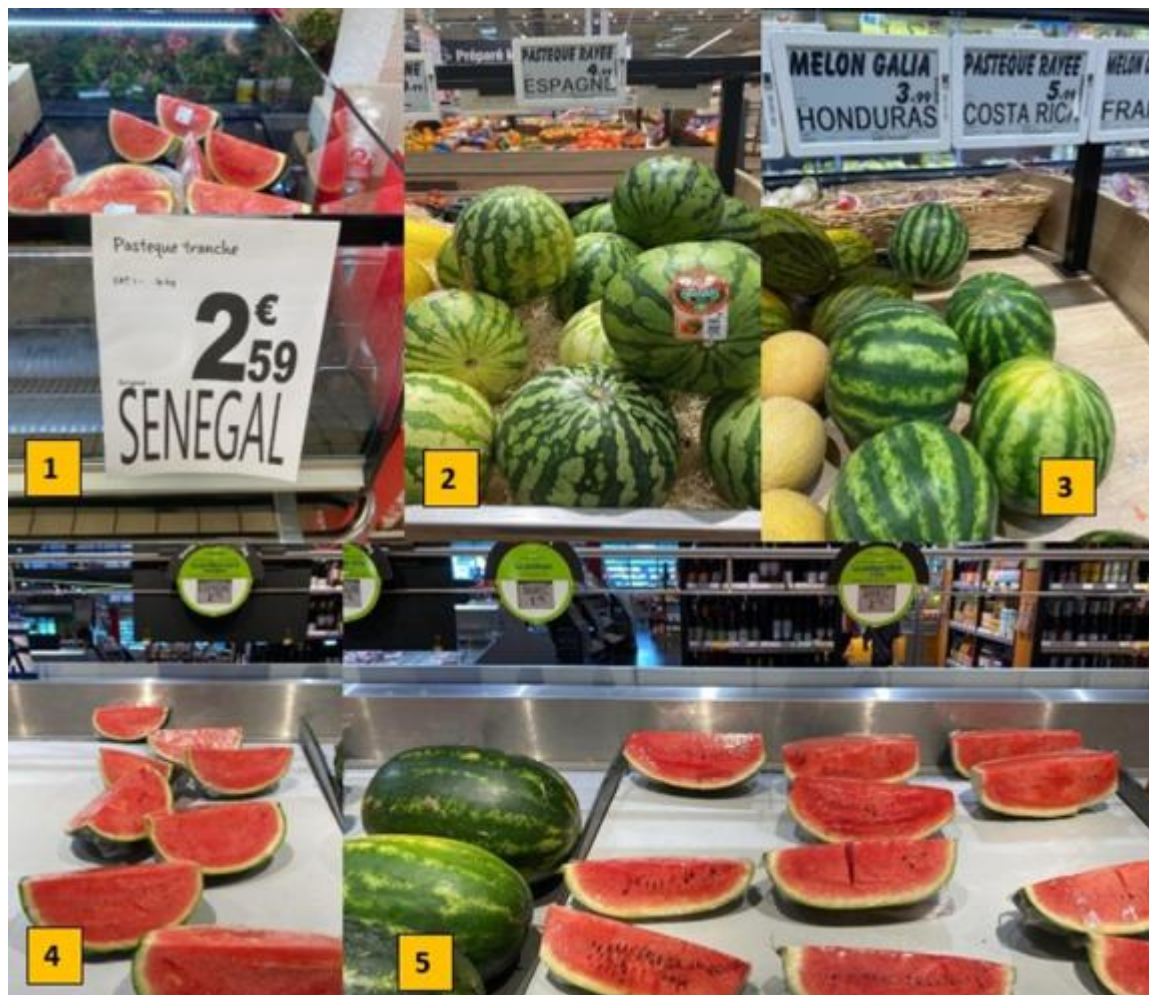
Watermelon production has a rather low carbon footprint and exporters generally do not use plastic packaging. Watermelon exporters in Morocco have taken steps to improve their sustainability. For instance, a Moroccan watermelon-producing company called [Rika](#) has committed to working with farmers who use sustainable farming practices that boost eco-friendly agriculture.

As a supplier, having certifications such as [GLOBALG.A.P](#), [Organic](#) and [Fairtrade](#) is a way to stand out from your competitors and attract new buyers. All of these certifications include traceability aspects.

As an exporter, you must be able to prove your good practices and convince importers and retailers in Europe.

A large number of retailers and importers are committing to social standards, such as Sedex Members Ethical Trade Audit ([SMETA](#)), or initiatives such as the Sustainability Initiative Fruit and Vegetables ([SIFAV](#)).

Figure 13: Watermelons sold in French supermarkets: Carrefour watermelon quarters from Senegal (1), Grand Frais whole watermelons from Spain (2), whole watermelons from Costa Rica (3), watermelon quarters from Spain (4), whole watermelons and watermelon quarters from Morocco (5)



Source: Photos by Thierry Paqui

Tips:

Work actively on sustainable cultivation and show your actions to potential buyers. A GLOBALG.A.P. certification should be your minimum effort to access opportunities in the main retail channels.

Read more about [which trends offer opportunities on the European fresh fruit and vegetable market](#) on the CBI market intelligence platform.

Thierry Paqui and [ICI Business](#) carried out this study on behalf of CBI.

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