

Australian Melon Export – Monthly Update

June 2020

For the 12 months ending 30 June 2020, Australian Melon exports reached a record 21,771 tonnes worth \$39.3 million, of which 68 per cent (14,887 tonnes) were musk melons and 32 per cent (6,885 tonnes) were watermelons. Melons were Australia's 4th largest fresh fruit export by volume.



Musk Melons

Musk melon exports were **14,887** tonnes worth A\$26.19m. The result was 5 per cent higher than the previous Financial Year (Table 1). Unit values were 3 per cent higher, which has meant that the overall value increased by 8 per cent for the 2019/20 season.

EXPORTS	YTD	Chg LY
Volume (tonnes)	14,887	5%
Value (M AUD)	26.19	8%
\$ per kg	\$1.76	3%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 222 per cent to 3,082 tonnes and is now the No.2 destination. Singapore has recorded 5,546 tonnes, which was 2 per cent lower. Malaysia was up 106 per cent to 504 tonnes.

The United Arab Emirates recorded a 35 per cent decrease to 1,481 tonnes and was impacted by the restricted air freight.

The market access issue due to cucumber green mottle mosaic virus (CGMMV) for New Zealand is now impacting trade where exports to New Zealand were 22 per cent lower (Table 2).

On a month by month basis exports were higher in most months until February. The lack of air freight capacity due to COVID19 and the market access issue for New Zealand impacted on the results in the June quarter.

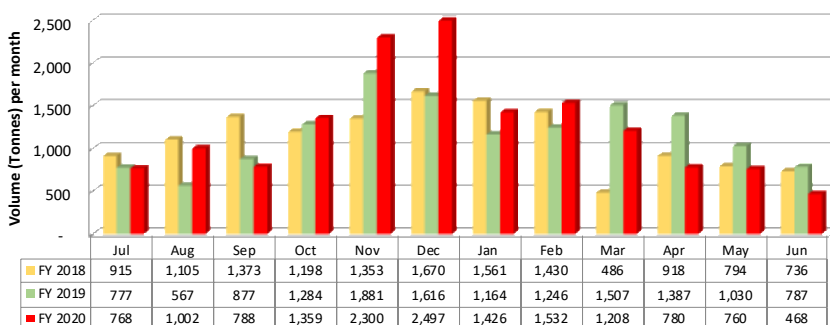
Market	July to June		
	2019/20	Chg LY	MAT
	Tonnes	%	Tonnes
Singapore	5,546	-2%	5,546
Japan	3,082	222%	3,082
New Zealand	2,289	-22%	2,289
United Arab Emirates	1,481	-35%	1,481
Hong Kong	1,266	1%	1,266
Malaysia	504	106%	504
Qatar	193	3%	193
Kuwait	119	-9%	119
Brunei Darussalam	87	105%	87
New Caledonia	82	-20%	82
Papua New Guinea	81	-21%	81
Fiji	46	49%	46
Saudi Arabia	40	-43%	40
French Polynesia	19	-50%	19
Oman	17		17
all other	111		36
Total YTD Tonnes	14,887	5%	14,887

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total

share of season **100.0%**

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 51 per cent of export shipments and was 18 per cent lower in 2019/20 impacting results.

	July to June		
	Tonnes	share	change
Air	7,609	51%	-18%
Sea	7,278	49%	51%
Total	14,887	100%	5%

Watermelons

For the same period, exports of watermelons were **6,885** tonnes worth A\$13.11m. The result was around 6 per cent lower than last FY (Table 4). Unit values were 9 per cent higher and this has meant that the overall value has increased by 3 per cent for the 2019/20 season.

Table 4 : Watermelons Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	6,885	-6%
Value (M AUD)	13.11	3%
\$ per kg	\$1.90	9%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Although New Zealand lifted 5 per cent to 2,314 tonnes the trade collapsed from April with the market access ban on watermelons from Queensland.

Japan has lifted from 5 to 178 tonnes and is now the No.4 destination. Leading market, United Arab Emirates has recorded 3,226 tonnes to date, though down 23 per cent mainly due to reduced air freight capacity. In other movers, Qatar was up 59 per cent to 742 tonnes and Seychelles was 101 per cent higher to 87 tonnes.

The ban in place for Queensland melons to New Zealand is impacting the trade going forward since New Zealand is the second largest destination for Australian watermelons.

Table 5 : Watermelon Exports by Market

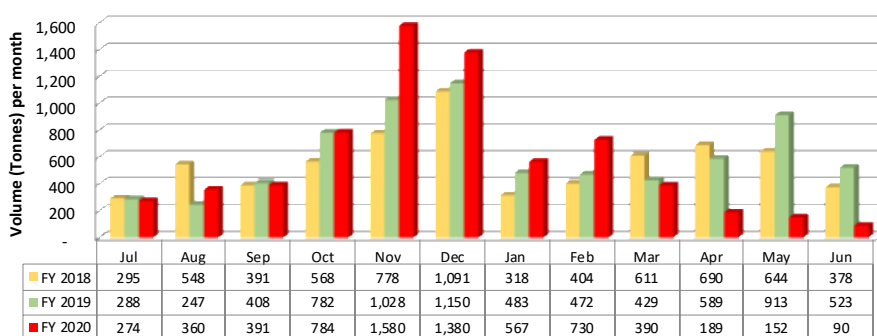
Market	July to June		
	2019/20	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	3,226	-23%	3,226
New Zealand	2,314	5%	2,314
Qatar	742	59%	742
Japan	178	++	178
Kuwait	122	-35%	122
Seychelles	87	101%	87
Papua New Guinea	75	-5%	75
Singapore	46	436%	46
Saudi Arabia	20	++	20
French Polynesia	19	-48%	19
Oman	14	101%	14
Bahrain	10	139%	10
Nauru	9	44%	9
Lebanon	7	-76%	7
Malaysia	5		5
all other	32		12
Total YTD Tonnes	6,885	-6%	6,885

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total
share of season 100.0% ++ >500% increase

On a month by month basis exports were higher in most months until February. The lack of air freight capacity due to COVID19 and the market access issue for New Zealand impacted on the results in the June quarter.

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 61 per cent of export shipments and was 16 per cent lower in 2019/20 impacting results.

Table 6: Watermelon export by mode

	July to June		
	Tonnes	share	change
Air	4,216	61%	-16%
Sea	2,669	39%	17%
Total	6,885	100%	-6%

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This project has been funded by Hort Innovation using the melon research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au