

Australian Melon Export – Monthly Update

October 2020



For the 4 months ending 31 October 2020, Australian Melon exports decreased 61 per cent to 2,260 tonnes compared to the same period in 2019, worth A\$5.5 million. Seventy-eight per cent (1,760 tonnes) were musk melons and 22 per cent (501 tonnes) were watermelons. The MAT was 18,308 tonnes, down 16 per cent from June 2020.

Musk Melons

Musk melon exports were 1,760 tonnes worth A\$4.09m. The result was 55 per cent below the same 4-month period in 2019 (Table 1). Unit values were 32 per cent higher, and the overall value decreased by 41 per cent for the period.

Table 1 : Musk Melon Key Measures

| EXPORTS | YTD | Chg LY |
|-----------------|--------|--------|
| Volume (tonnes) | 1,760 | -55% |
| Value (M AUD) | 4.09 | -41% |
| \$ per kg | \$2.32 | 32% |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 727 per cent to 620 tonnes and is on track to become the leading destination as Singapore declined further. Malaysia increased 75 per cent to 126 tonnes while Singapore, the leading destination dropped 61 per cent to 679 tonnes.

The United Arab Emirates recorded a 66 per cent decrease to 58 tonnes and was impacted by the restricted air freight and lack of demand for melons in food service.

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 nil to date (Table 2) compared to 1,437 tonnes last year to date.

Table 2 : Musk Melon Exports by Market

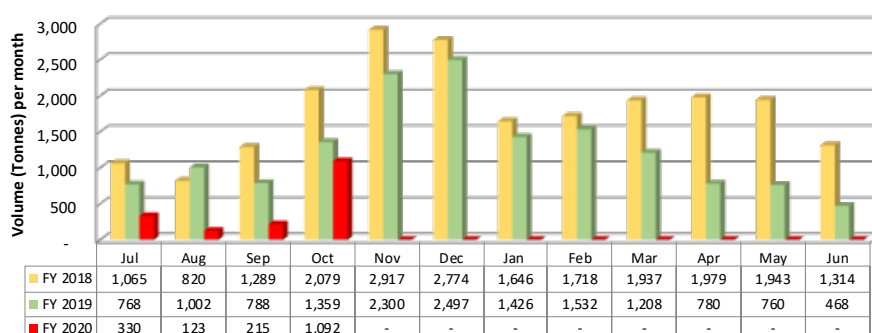
| Market | July to October | | |
|-------------------------|-----------------|-------------|---------------|
| | 2020/21 | Chg LY | MAT |
| | Tonnes | % | Tonnes |
| Singapore | 679 | -61% | 4,478 |
| Japan | 620 | 727% | 3,627 |
| United Arab Emirates | 58 | -66% | 1,367 |
| Hong Kong | 152 | -40% | 1,164 |
| New Zealand | - | -100% | 852 |
| Malaysia | 126 | 75% | 558 |
| Qatar | 43 | 91% | 213 |
| Kuwait | 0 | 82% | 119 |
| Brunei Darussalam | 34 | 95% | 104 |
| Papua New Guinea | 21 | -33% | 70 |
| New Caledonia | 22 | -50% | 60 |
| Saudi Arabia | 0 | | 30 |
| Fiji | 1 | -93% | 28 |
| French Polynesia | - | -100% | 18 |
| Oman | - | -100% | 14 |
| all other | 4 | | 29 |
| Total YTD Tonnes | 1,760 | -55% | 12,731 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total
share of season **13.8%**

On a month by month basis exports in October were 1,092 tonnes compared to 1,359 tonnes last year. The lack of air freight capacity and the market access issue for New Zealand impacted on the results in the year to date.

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 43 per cent of export shipments and was 43 per cent lower in the period ending September 2020

Table 3. Melon export by transport mode

| | July to October | | |
|--------------|-----------------|-------------|-------------|
| | Tonnes | share | change |
| Sea | 996 | 57% | -32% |
| Air | 764 | 43% | -69% |
| Total | 1,760 | 100% | -55% |

Watermelons

For the same period, exports of watermelons were **501** tonnes worth A\$1.37m. The result was around 71 per cent lower than the same period last year (Table 4). Unit values were 26 per cent higher and this has meant that the overall value has decreased by 65 per cent for the 4-month period.

Table 4 : Watermelon Key Measures

| EXPORTS | YTD | Chg LY |
|-----------------|--------|--------|
| Volume (tonnes) | 501 | -72% |
| Value (M AUD) | 1.37 | -65% |
| \$ per kg | \$2.73 | 26% |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 610 tonnes last year to nil. Trade to United Arab Emirates dropped by 81 per cent to 187 tonnes. These were the largest destinations in previous years.

Conversely Qatar lifted strongly and offset some of the losses to the UAE although combined trade to the Middle East is 66 per cent or 750 tonnes lower influenced by lack of demand by food service operators and air freight.

Japan received 74 tonnes, which was new trade and is now the No.3 destination to date.

On a month by month basis exports were 74 per cent lower in October influenced by the New Zealand

suspension, lack of food service demand due to COVID19 and lack of air freight capacity.

Table 5 : Watermelon Exports by Market

| Market | July to October | | |
|-------------------------|-----------------|-------------|--------------|
| | 2020/21 | Chg LY | MAT |
| | Tonnes | % | Tonnes |
| United Arab Emirates | 187 | -81% | 2,405 |
| New Zealand | - | -100% | 1,704 |
| Qatar | 177 | 87% | 824 |
| Japan | 74 | ++ | 252 |
| Kuwait | 17 | -32% | 114 |
| Papua New Guinea | 25 | 11% | 77 |
| Seychelles | - | -100% | 75 |
| Singapore | 2 | -78% | 39 |
| French Polynesia | - | | 19 |
| New Caledonia | 14 | ++ | 18 |
| Oman | - | | 13 |
| Bahrain | 2 | -20% | 10 |
| Saudi Arabia | - | -100% | 8 |
| Nauru | 3 | -20% | 8 |
| Lebanon | - | | 7 |
| all other | 4 | | 7 |
| Total YTD Tonnes | 501 | -72% | 5,578 |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

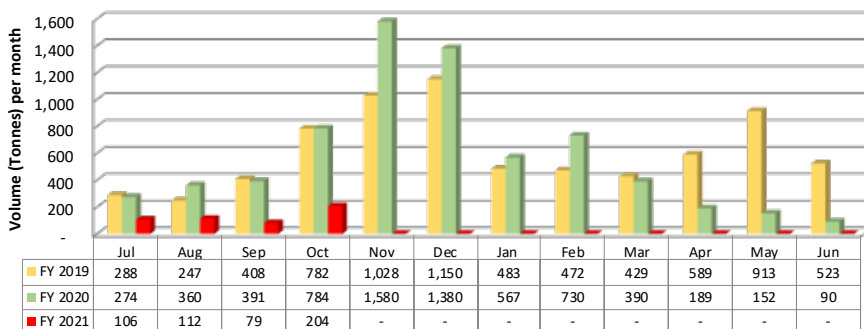
Ranked by annual volume

MAT - Moving Annual Total

share of season

9.0% ++ >500% increase

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 81 per cent of export shipments and was 65 per cent lower in the period ending September 2020

Table 6. Melon export by transport mode

| | July to October | | |
|--------------|-----------------|-------------|-------------|
| | Tonnes | share | change |
| Sea | 95 | 19% | -85% |
| Air | 406 | 81% | -65% |
| Total | 501 | 100% | -72% |

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