

Australian Melon Export – Monthly Update

September 2020

For the 3 months ending 30 September 2020, Australian Melon exports decreased 73 per cent to 969 tonnes worth \$2.37 million, of which 69 per cent (670 tonnes) were musk melons and 31 per cent (300 tonnes) were watermelons.



Musk Melons

Musk melon exports were 670 tonnes worth A\$1.57m. The result was 74 per cent below the same 3-month period in the previous year (Table 1). Unit values were 31 per cent higher, which has meant that the overall value decreased by 66 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	670	-74%
Value (M AUD)	1.57	-66%
\$ per kg	\$2.34	31%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 609 per cent to 113 tonnes and is now the No.2 destination. Malaysia increased 57 per cent to 77 tonnes while Singapore, the leading destination dropped 77 per cent to 277 tonnes.

The United Arab Emirates recorded a 35 per cent decrease to 51 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 900 tonnes last year to date.

On a month by month basis exports in September were 217 tonnes compared to 788 tonnes last year. The lack of air freight capacity and the market access issue for New Zealand impacted on the results in the September quarter.

Table 2 : Musk Melon Exports by Market

Market	July to September		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Singapore	277	-77%	4,601
Japan	113	609%	3,179
United Arab Emirates	51	-35%	1,454
New Zealand	-	-	1,377
Hong Kong	63	-62%	1,162
Malaysia	77	57%	532
Qatar	22	87%	203
Kuwait	0	-	119
Brunei Darussalam	25	86%	99
Papua New Guinea	16	-28%	75
New Caledonia	22	-	69
Saudi Arabia	0	-91%	36
Fiji	1	-93%	32
French Polynesia	-	-100%	18
Oman	-	-	14
all other	4	-	30
Total YTD Tonnes	670	-74%	12,999

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

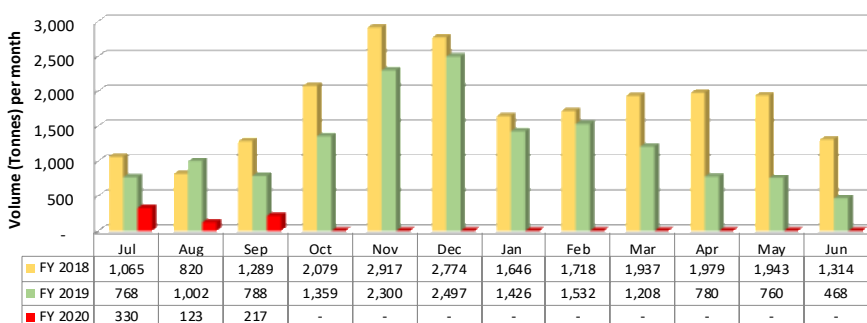
Ranked by annual volume

MAT - Moving Annual Total

share of season

5.2%

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 75 per cent of export shipments and was 70 per cent lower in the quarter ending September 2020

Table 4. Melon export by transport mode

	July to September		
	Tonnes	share	change
Sea	170	25%	-81%
Air	500	75%	-70%
Total	670	100%	-74%

Watermelons

For the same period, exports of watermelons were **300** tonnes worth A\$0.8m. The result was around 71 per cent lower than the same period last year (Table 4). Unit values were 13 per cent higher and this has meant that the overall value has decreased by 67 per cent for the 3-month period.

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	300	-71%
Value (M AUD)	0.80	-67%
\$ per kg	\$2.68	13%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 262 tonnes last year to nil. Trade to United Arab Emirates dropped by 83 per cent to 111 tonnes. These were the largest destinations in previous years.

Qatar and Kuwait lifted strongly and offset some of the losses to the UAE although trade to the Middle East is 500 tonnes lower influenced by lack of demand by food service operators.

Japan received 42 tonnes, which was new trade and is now the No.3 destination to date.

On a month by month basis exports have crashed and were 79 per cent lower in September 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 September		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	111	-83%	2,673
New Zealand	-	-100%	2,052
Qatar	95	109%	791
Japan	42		219
Kuwait	13	184%	130
Seychelles	-		87
Papua New Guinea	22	41%	81
Singapore	0	-99%	37
French Polynesia	-		19
New Caledonia	14	++	18
Oman	-		14
Bahrain	2	-20%	10
Saudi Arabia	-	-100%	8
Nauru	2	-33%	8
Lebanon	-		7
all other	3		7
Total YTD Tonnes	300	-71%	6,161

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

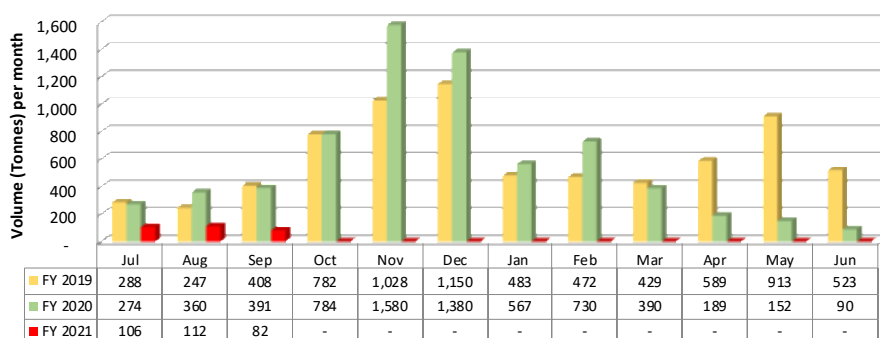
Ranked by annual volume

MAT - Moving Annual Total

share of season

4.9% ++ >500% increase

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 78 per cent of export shipments and was 69 per cent lower in the quarter ending September 2020

Table 6. Melon export by transport mode

	July to September		
	Tonnes	share	change
Sea	67	22%	-76%
Air	233	78%	-69%
Total	300	100%	-71%

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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