

Australian Melon Export – Monthly Update

November 2020



For the 5 months ending 30 November 2020, Australian Melon exports decreased 60 per cent to 3,885 tonnes compared to the same period in 2019, worth A\$8.4 million. Eighty-two per cent (3,201 tonnes) were musk melons and 18 per cent (684 tonnes) were watermelons. The MAT was 16,054 tonnes, down 26 per cent from June.

Musk Melons

Musk melon exports were 3,201 tonnes worth A\$6.55m. The result was 49 per cent below the same 5-month period in 2019 (Table 1). Unit values were 15 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)	3,201	-49%
Value (M AUD)	6.55	-41%
\$ per kg	\$2.05	15%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 78 per cent to 1,428 tonnes and is now the leading destination year to date as Singapore declined 53 per cent to 1,125 tonnes. Malaysia increased 22 per cent to 135 tonnes.

The United Arab Emirates recorded a 75 per cent decrease to 66 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 1,905 tonnes last year to date.

On a month by month basis exports in November were 1,494 tonnes compared to 2,300 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.

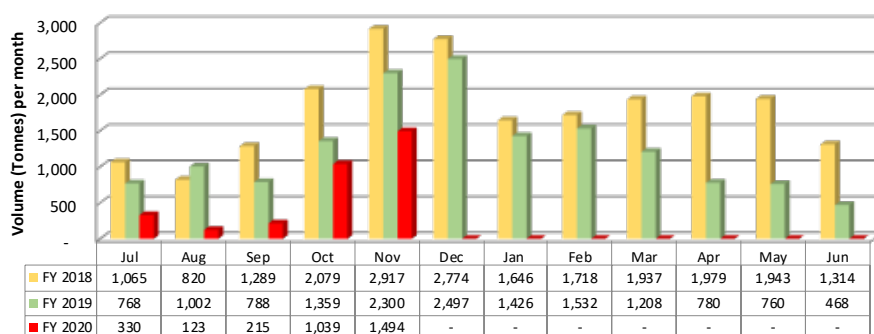
Table 2 : Musk Melon Exports by Market

Market	July to November		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Singapore	1,125	-53%	4,300
Japan	1,428	78%	3,707
United Arab Emirates	66	-75%	1,280
Hong Kong	278	-42%	1,063
Malaysia	135	22%	528
New Zealand	-	-100%	383
Qatar	62	4%	196
Brunei Darussalam	49	103%	112
Kuwait	4	-91%	82
New Caledonia	22	-50%	60
Papua New Guinea	25	-45%	60
Saudi Arabia	1	-93%	24
Fiji	2	-94%	19
French Polynesia	-	-100%	17
Oman	-	-100%	14
all other	5		28
Total YTD Tonnes	3,201	-49%	11,872

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total
share of season **27.0%**

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 38 per cent of export shipments and was 66 per cent lower in the period ending November 2020

Table 3. M/Mel export by transport mode

	July to November		
	Tonnes	share	change
		%	%
Sea	1,997	62%	-25%
Air	1,204	38%	-66%
Total	3,201	100%	-49%

Watermelons

For the same period, exports of watermelons were **684** tonnes worth A\$1.85m. The result was around 80 per cent lower than the same period last year (Table 4). Unit values were 46 per cent higher to \$2.70 / kg and this has meant that the overall value has decreased by 70 per cent for the 5-month period.

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	684	-80%
Value (M AUD)	1.85	-70%
\$ per kg	\$2.70	46%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 1,576 tonnes last year to nil. Trade to United Arab Emirates dropped by 83 per cent to 245 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 70 per cent or 1,182 tonnes lower influenced by lack of demand by food service operators and air freight.

Japan received 121 tonnes, which was new trade and is now the No.3 destination to date.

On a month by month basis exports were 87 per cent lower in November 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 November		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	245	-83%	1,998
Qatar	245	42%	814
New Zealand	-	-100%	738
Japan	121	478%	278
Kuwait	24	-50%	98
Papua New Guinea	28	-17%	69
Seychelles	-	-100%	67
Singapore	2	-76%	39
French Polynesia	-	-100%	19
New Caledonia	14	++	18
Oman	-	-100%	13
Bahrain	2	-25%	10
Nauru	4	-27%	7
Lebanon	-	-100%	5
Saudi Arabia	-	-	4
all other	4	-	7
Total YTD Tonnes	684	-80%	4,182

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

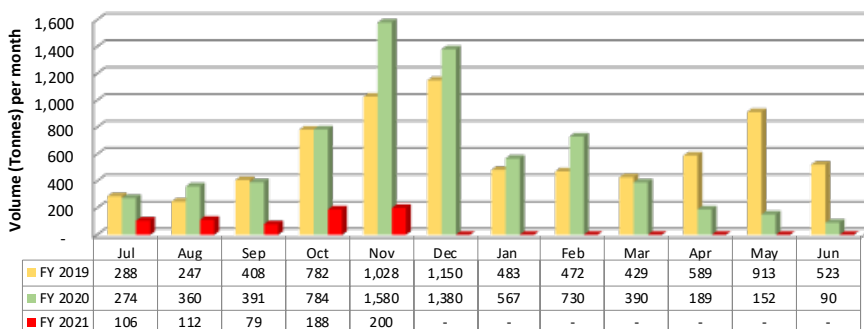
Ranked by MAT

MAT - Moving Annual Total

share of season

16.4% ++ >500% increase

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 85 per cent of export shipments and was 67 per cent lower in the period ending November 2020

Table 6. W/Mel export by transport mode

	July to November		
	Tonnes	share	change
Sea	103	15%	-94%
Air	581	85%	-67%
Total	684	100%	-80%

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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