

Australian Melon Export – Monthly Update

December 2020



For the 6 months ending 31 December 2020, Australian Melon exports had decreased 60 per cent to 5,889 tonnes compared to the same period in 2019, worth A\$12.31 million. Eighty-four per cent (4,973 tonnes) were musk melons and 16 per cent (916 tonnes) were watermelons. The MAT was 14,181 tonnes, down 35 per cent from June.

Musk Melons

Musk melon exports were 4,973 tonnes worth A\$9.95m. The result was 43 per cent below the same 6-month period in 2019 (Table 1). Unit values were 10 per cent higher, and the overall value decreased by 37 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	4,973	-43%
Value (M AUD)	9.95	-37%
\$ per kg	\$2.00	10%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 30 per cent to 2,417 tonnes and is the leading destination year to date as Singapore declined 41 per cent to 1,688 tonnes. Malaysia increased 29 per cent to 207 tonnes.

The United Arab Emirates recorded 84 per cent decrease to 79 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 2,249 tonnes last year to date.

On a month by month basis exports in December were 1,874 tonnes compared to 2,497 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.

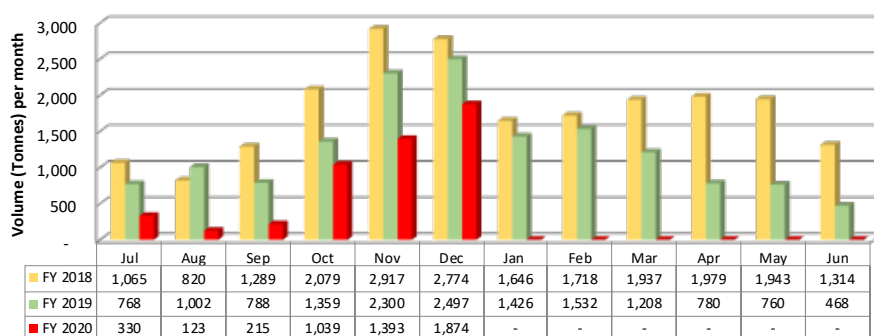
Table 2 : Musk Melon Exports by Market

Market	July to December		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Singapore	1,688	-41%	4,386
Japan	2,417	30%	3,639
United Arab Emirates	79	-84%	1,055
Hong Kong	270	-63%	799
Malaysia	207	29%	550
Qatar	78	2%	194
Brunei Darussalam	56	90%	114
China	111		111
Papua New Guinea	33	-35%	63
New Caledonia	22	-50%	60
Kuwait	5	-94%	46
New Zealand	-	-100%	40
Fiji	2	-95%	17
French Polynesia	-	-100%	16
Saudi Arabia	2	-93%	15
all other	8		42
Total YTD Tonnes	4,973	-43%	11,148

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total
share of season **44.6%**

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 30 per cent of export shipments and was 70 per cent lower in the period ending December 2020

	Tonnes	share	change
		%	%
Sea	3,461	70%	-14%
Air	1,513	30%	-68%
Total	4,973	100%	-43%

Watermelons

For the same period, exports of watermelons reached **916** tonnes worth A\$2.36m. The result was around 81 per cent lower than the same period last year (Table 4). Unit values were 47 per cent higher to \$2.58 / kg and this has meant that the overall value has decreased by 72 per cent for the 6-month period.

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	916	-81%
Value (M AUD)	2.36	-72%
\$ per kg	\$2.58	47%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 2,314 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 lower at 679 tonnes influenced by lack of demand by food service operators and air freight.

Japan received 181 tonnes, which was new trade since 2019 and is now the No.3 destination to date.

On a month by month basis exports were 241 tonnes in December, down 83 per cent 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 December		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Qatar	318	24%	803
United Arab Emirates	324	-83%	1,617
Japan	181	197%	298
Kuwait	34	-53%	83
Papua New Guinea	35	-16%	68
Nauru	5	-22%	8
Lebanon	1	-61%	5
Bahrain	2	-32%	9
Singapore	2	-83%	35
Seychelles	-		55
Saudi Arabia	-	-100%	0
Oman	-	-100%	10
New Zealand	-	-100%	-
New Caledonia	14	1400%	18
Malaysia	-		1
all other	14		24
Total YTD Tonnes	916	-81%	3,033

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

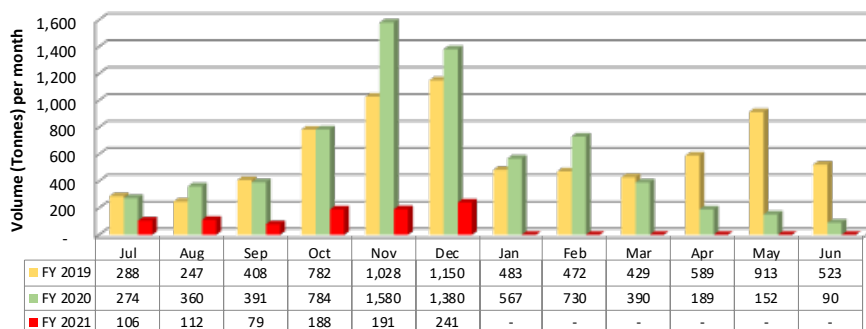
Ranked by MAT

MAT - Moving Annual Total

share of season

30.2%

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 December		
	Tonnes	share	change
Sea	133	15%	-94%
Air	783	85%	-67%
Total	916	100%	-81%

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