

Australian Melon Export – Monthly Update

February 2021



For the 8 months ending 28 February 2021, Australian Melon exports recorded 8,897 tonnes and down 35 per cent compared to the same period in 2020, worth A\$17.9 million. Eighty-five per cent (7,563 tonnes) were musk melons and 15 per cent (1,334 tonnes) were watermelons. The MAT was 11,346 tonnes, falling 48 per cent from June 2020.

Musk Melons

By end February 2021 musk melon exports were 7,563 tonnes worth A\$14.49m. The result was 35 per cent below the same period in 2020 (Table 1). Unit values were 6 per cent higher, and the overall value decreased by 31 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	7,563	-35%
Value (M AUD)	14.49	-31%
\$ per kg	\$1.92	6%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 47 per cent to 3,582 tonnes and is the leading destination year to date as Singapore declined 33 per cent to 2,677 tonnes. Malaysia eased 7 per cent to 237 tonnes.

The United Arab Emirates recorded 77 per cent decrease to 267 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 impacted trade where exports to New Zealand were nil to date (Table 2) though the suspension was lifted from 16 March 2021.

On a month by month basis exports in February were 1,358 tonnes compared to 1,532 tonnes last year as trade returns to some consistency with 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

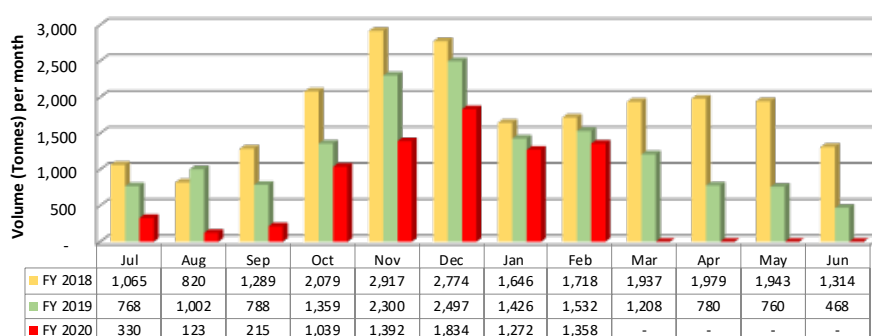
Market	July to February		MAT
	2020/21	Chg LY	
	Tonnes	%	Tonnes
Japan	3,582	47%	3,674
Singapore	2,677	-33%	3,681
Hong Kong	350	-67%	539
United Arab Emirates	267	-77%	470
Malaysia	237	-7%	452
Qatar	116	-11%	152
China	111		111
Brunei Darussalam	87	100%	115
New Caledonia	64	46%	69
Papua New Guinea	39	-33%	59
Kuwait	17	-84%	22
Saudi Arabia	5	-87%	7
Canada	4		8
Nauru	2	41%	3
New Zealand	-	-100%	32
all other	12		28
Total YTD Tonnes	7,563	-35%	9,421

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume

MAT - Moving Annual Total

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 32 per cent of export shipments and was 62 per cent lower in the period ending January 2021

Table 3. M/Mel export by transport mode

	July to February		
	Tonnes	share	change
		%	%
Sea	5,235	69%	2%
Air	2,450	32%	-62%
Total	7,563	100%	-35%

Watermelons

For the same period, exports of watermelons reached **1,334** tonnes worth A\$3.43m. The result was around 78 per cent lower than the same period last year (Table 4). Unit values were 39 per cent higher to \$2.57 / kg and this has meant that the overall value has decreased by 69 per cent for the 8-month period (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	1,334	-78%
Value (M AUD)	3.43	-69%
\$ per kg	\$2.57	39%

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 492 tonnes. These were the largest destinations in previous years.

Qatar had lifted strongly and offset some of the losses by the UAE though had eased by February. The combined trade to the Middle East is 71 per cent lower at 1009 tonnes influenced by lack of demand by food service operators and air freight restrictions.

Japan received 231 tonnes, which was new trade since 2019 and is now the No.3 destination to date.

On a month by month basis exports were 230 tonnes in

February, down 69 per cent influenced by the New Zealand suspension. The New Zealand suspension was lifted 16 March 2021 and trade should start flowing again from late March.

Table 5 : Watermelon Exports by Market

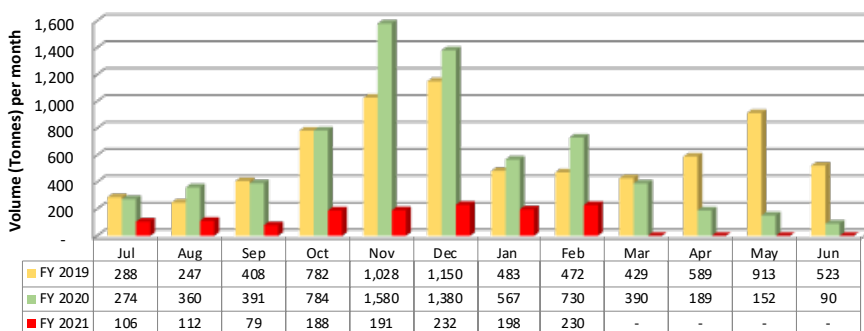
Market	July to February	
	2020/21	Chg LY MAT
	Tonnes	% Tonnes
United Arab Emirates	492	-83% 811
Qatar	448	-2% 653
Japan	231	67% 228
Kuwait	63	-43% 65
New Caledonia	43	4699% 28
Papua New Guinea	41	-21% 61
Nauru	6	-10% 7
Lebanon	3	-50% 4
Singapore	2	-91% 22
Bahrain	2	7
Saudi Arabia	1	-93% 1
Kiribati	1	-44% 1
Malaysia	0	-93% 1
New Zealand	-	-
Seychelles	-	17
all other	0	17
Total YTD Tonnes	1,334	-78% 1,925

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by MAT

MAT - Moving Annual Total

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 86 per cent of export shipments and was 68 per cent lower in the period ending January 2021

Table 6. W/Mel export by transport mode

	July to February	
	Tonnes	share change
Sea	199	15% -92%
Air	1,136	85% -68%
Total	1,334	100% -78%

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