

Australian Melon Export – Monthly Update

March 2021



For the 9 months ending 31 March 2021, Australian Melon exports recorded 10,145 tonnes which was 46 per cent lower compared to the same period in 2020, worth A\$20.81 million. Eighty-four per cent (8,565 tonnes) were musk melons and 16 per cent (1,581 tonnes) were watermelons.

The MAT was 12,584 tonnes, falling 42 per cent from June 2020.

Musk Melons

By end March 2021 musk melon exports were 8,565 tonnes worth A\$16.73m. The result was 33 per cent below the same period in 2020 (Table 1). Unit values were 9 per cent higher, and the overall value decreased by 27 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	8,565	-33%
Value (M AUD)	16.73	-27%
\$ per kg	\$1.95	9%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 46 per cent to 3,857 tonnes and is the leading destination year to date as Singapore declined 31 per cent to 3,147 tonnes. Hong Kong and UAE are both over 50 per cent lower.

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 although there was no trade recorded in March.

On a month by month basis exports in March were 1,038 tonnes compared to 1,208 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.

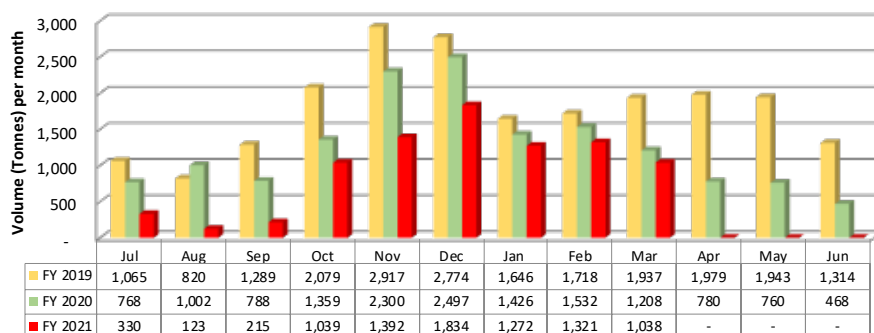
Table 2 : Musk Melon Exports by Market
July to March

Market	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Japan	3,857	46%	4,291
Singapore	3,147	-31%	4,101
Hong Kong	507	-53%	691
United Arab Emirates	406	-71%	501
Malaysia	252	-26%	411
Qatar	136	-13%	171
Brunei Darussalam	93	81%	121
New Caledonia	77	62%	111
Papua New Guinea	49	-26%	61
Kuwait	22	-80%	21
New Zealand	-	-100%	21
Saudi Arabia	5	-87%	1
Canada	4	-10%	4
Fiji	2	-95%	1
Nauru	3	41%	1
all other	15		1
Total YTD Tonnes	8,565	-33%	10,571

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 36 per cent of export shipments and was 57 per cent lower in the period March 2021

Table 3. M/Mel export by transport mode

	July to March		
	Tonnes	share	change
Sea	5,636	66%	-2%
Air	3,051	36%	-57%
Total	8,565	100%	-33%

Watermelons

For the same period, exports of watermelons reached **1,581** tonnes worth A\$4.09m. The result was around 74 per cent lower than the same period last year (Table 4). Unit values were 40 per cent higher to \$2.58 / kg and this has meant that the overall value has decreased by 63 per cent for the 9-month period (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	1,581	-74%
Value (M AUD)	4.09	-63%
\$ per kg	\$2.58	40%

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 79 per cent to 599 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 65 per cent lower at 1,210 tonnes influenced by lack of demand by food service operators and air freight restrictions.

Japan received 254 tonnes, which was new trade since 2019 and is now the No.3 destination to date.

On a month by month basis exports were 251 tonnes in March, down 35 per cent influenced by the New Zealand suspension. The New Zealand suspension was lifted 16 March 2021 and trade should start flowing again from April.

Table 5 : Watermelon Exports by Market

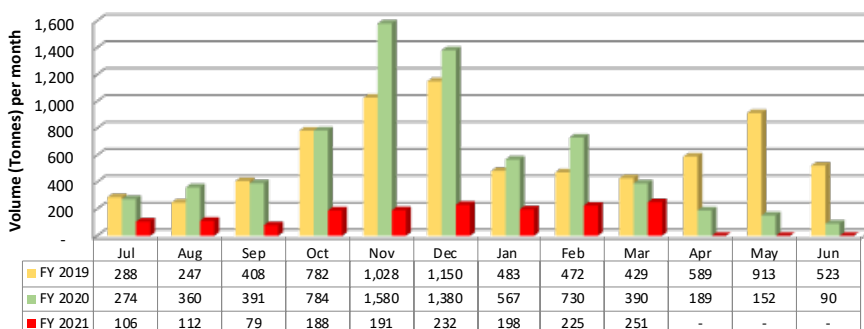
Market	July to March		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	599	-79%	771
Qatar	521	14%	737
Japan	254	84%	255
Kuwait	81	-26%	86
Papua New Guinea	46	-10%	60
New Caledonia	58		60
Singapore	2	-90%	23
Seychelles	-	-100%	-
French Polynesia	-	-100%	-
Bahrain	2	-61%	2
Nauru	7	2%	9
Lebanon	5	-11%	5
Fiji	-		-
Oman	0		0
New Zealand	-		-
all other	4		4
Total YTD Tonnes	1,581	-74%	2,011

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 85 per cent of export shipments and was 62 per cent lower in the period ending March 2021

Table 6. W/Mel export by transport mode

	July to February		
	Tonnes	share	change
Sea	231	15%	-91%
Air	1,350	85%	-62%
Total	1,581	100%	-74%

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