

Australian Melon Export – Monthly Update

April 2021



For the 10 months ending 30 April 2021, Australian Melon exports recorded 11,236 tonnes which was 45 per cent lower compared to the same period in 2020, worth A\$23.07 million. Eighty-four per cent (9,456 tonnes) were musk melons and 16 per cent (1,780 tonnes) were watermelons.

The MAT was 12,706 tonnes, rising 1 per cent in the month indicating a slight positive momentum.

Musk Melons

By end April 2021 musk melon exports were 9,456 tonnes worth A\$18.47m. The result was 31 per cent below the same period in 2020 (Table 1). Unit values were 10 per cent higher, and the overall value decreased by 24 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	9,456	-31%
Value (M AUD)	18.47	-24%
\$ per kg	\$1.95	10%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 48 per cent to 4,116 tonnes and is the leading destination year to date since Singapore declined 28 per cent to 3,594 tonnes. Hong Kong and UAE are both over 50 per cent lower.

The market access issue due to cucumber green mottle mosaic virus (CGMMV) impacted trade where exports to New Zealand were nil through 2020 (Table 2). Though the suspension was lifted from 16 March 2021 there has been only 12 tonnes of trade recorded since re opening.

On a month by month basis exports in April were 938 tonnes compared to 780 tonnes last year being a small improvement. The lack of air freight capacity and the market access issue for New Zealand have impacted on the results in the year to date.

Table 2 : Musk Melon Exports by Market

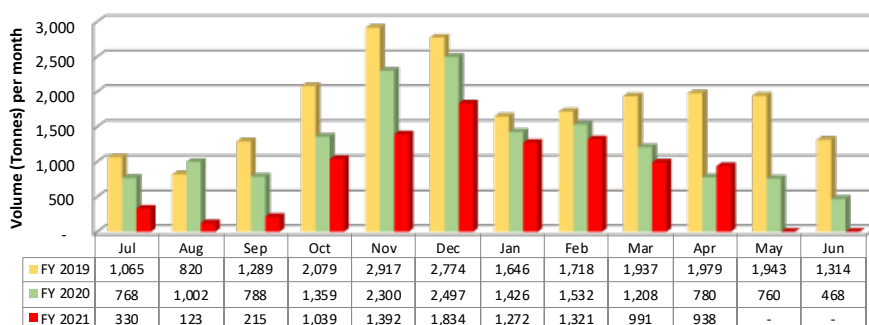
Market	July to April		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Japan	4,116	48%	4,407
Singapore	3,594	-28%	4,182
Hong Kong	531	-54%	638
United Arab Emirates	498	-66%	535
Malaysia	273	-30%	388
Qatar	144	-15%	168
Brunei Darussalam	103	74%	131
New Caledonia	87	43%	108
Papua New Guinea	53	-26%	62
Kuwait	22	-80%	29
New Zealand	12	-99%	12
Saudi Arabia	6	-86%	6
Canada	4	-10%	4
Fiji	3	-93%	4
Nauru	3	42%	3
all other	16		6
Total YTD Tonnes	9,456	-31%	10,684

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 53 per cent lower in the period March 2021

Table 3. M/Mel export by transport mode

	July to April		
	Tonnes	share	change
Sea	6,138	65%	-3%
Air	3,440	36%	-53%
Total	9,456	100%	-31%

Watermelons

For the same period, exports of watermelons reached **1,780** tonnes worth A\$4.59m. The result was around 73 per cent lower than the same period last year (Table 4). Unit values were 38 per cent higher to \$2.58 per kg and this has meant that the overall value has decreased by 63 per cent for the 10-month period (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	1,780	-73%
Value (M AUD)	4.59	-63%
\$ per kg	\$2.58	38%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 2,289 tonnes last year to nil. Trade to United Arab Emirates dropped by 78 per cent to 693 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 and is now at the same level as last year. The combined trade to the Middle East is 65 per cent lower at 1,368 tonnes influenced by lack of demand by food service operators and air freight restrictions.

Japan received 255 tonnes, though only 0.2 tonnes in April though remains the No.3 destination to date.

On a month by month basis exports were 203 tonnes in April, up 7 per cent on 2020 though well below previous years. The New Zealand suspension was lifted 16 March 2021 though no trade has been recorded to date.

Table 5 : Watermelon Exports by Market

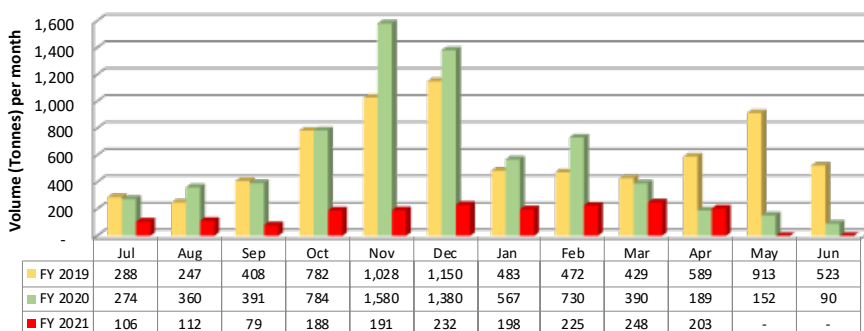
Market	July to March		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	693	-78%	758
Qatar	579	0%	741
Japan	255	43%	255
Kuwait	87	-26%	91
New Caledonia	61	1144%	61
Papua New Guinea	46	-30%	55
Singapore	40	-11%	40
Nauru	8	-3%	9
Lebanon	5	-20%	5
Bahrain	2	-81%	2
Saudi Arabia	1	-93%	1
Kiribati	1	-26%	2
Oman	0	-97%	0
Malaysia	0	-94%	0
New Zealand	-	-100%	-
all other	1		0
Total YTD Tonnes	1,780	-73%	2,022

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 March		
	Tonnes	share	change
Sea	271	15%	-90%
Air	1,510	85%	-62%
Total	1,780	100%	-73%

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