

Australian Melon Export – Monthly Update

May 2021



For the 11 months ending 31 May 2021, Australian Melon exports recorded 12,146 tonnes which was 43 per cent lower compared to the same period in 2020, worth A\$25.05 million. Eighty-four per cent (10,187 tonnes) were musk melons and 16 per cent (1,959 tonnes) were watermelons.

The MAT was 12,704 tonnes, rising less than 1 per cent in the month.

Musk Melons

By end May 2021 musk melon exports were 10,187 tonnes worth A\$19.88m. The result was 29 per cent below the same period in 2020 (Table 1). Unit values were 11 per cent higher, and the overall value decreased by 21 per cent for the period.

Table 1 : Musk Melon Key Measures

| EXPORTS | YTD | Chg LY |
|-----------------|--------|--------|
| Volume (tonnes) | 10,187 | -29% |
| Value (M AUD) | 19.88 | -21% |
| \$ per kg | \$1.95 | 11% |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 46 per cent to 4,252 tonnes and is the leading destination this year since Singapore declined 27 per cent to 3,940 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). Since the suspension was lifted from 16 March 2021 there has been 96 tonnes exported by end May.

On a month by month basis exports in May were 799 tonnes compared to 760 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

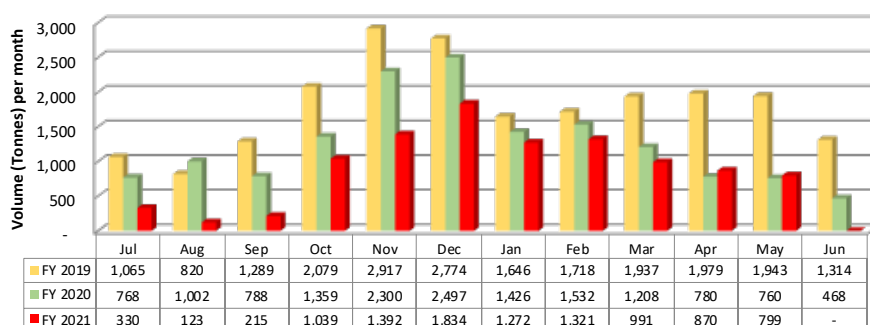
| Market | July to May | | |
|-------------------------|---------------|-------------|---------------|
| | 2020/21 | Chg LY | MAT |
| | Tonnes | % | Tonnes |
| Japan | 4,252 | 46% | 4,415 |
| Singapore | 3,940 | -27% | 4,109 |
| Hong Kong | 608 | -50% | 654 |
| United Arab Emirates | 515 | -65% | 544 |
| Malaysia | 295 | -38% | 322 |
| Qatar | 149 | -20% | 156 |
| New Caledonia | 119 | 67% | 130 |
| Brunei Darussalam | 110 | 39% | 118 |
| New Zealand | 96 | -96% | 96 |
| Papua New Guinea | 58 | -24% | 62 |
| Kuwait | 22 | -81% | 25 |
| Saudi Arabia | 6 | -85% | 6 |
| Canada | 4 | -10% | 4 |
| Nauru | 3 | 59% | 4 |
| Fiji | 3 | -93% | 4 |
| all other | 17 | | 7 |
| Total YTD Tonnes | 10,187 | -29% | 10,655 |

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 37 per cent of export shipments and was 49 per cent lower in the period May 2021

Table 3. M/Mel export by transport mode

| | July to May | | |
|--------------|---------------|-------------|-------------|
| | Tonnes | share | change |
| Sea | 6,511 | 64% | -7% |
| Air | 3,798 | 37% | -49% |
| Total | 10,187 | 100% | -29% |

Watermelons

For the same period, exports of watermelons reached **1,959** tonnes worth A\$5.17m. The result was around 71 per cent lower than the same period last year (Table 4). Unit values were 40 per cent higher to \$2.64 per kg and this has meant that the overall value has decreased by 60 per cent for the period (Table 4).

Table 4 : Watermelon Key Measures

| EXPORTS | YTD | Chg LY |
|-----------------|--------|--------|
| Volume (tonnes) | 1,959 | -71% |
| Value (M AUD) | 5.17 | -60% |
| \$ per kg | \$2.64 | 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 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 6 per cent below last year. The combined trade to the Middle East is 62 per cent lower at 1,526 tonnes influenced by lack of demand by food service operators and air freight restrictions.

Japan received 255 tonnes, although no trade since March. Japan remains the No.3 destination to date.

On a month by month basis exports were 186 tonnes in May, up 23 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

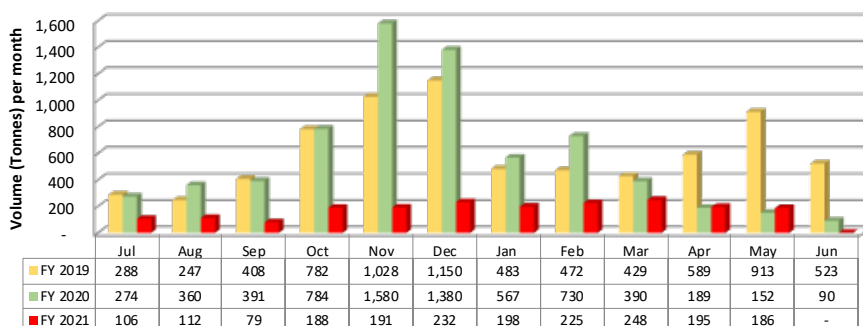
| Market | July to May | | |
|-------------------------|--------------|-------------|--------------|
| | 2020/21 | Chg LY | MAT |
| | Tonnes | % | Tonnes |
| United Arab Emirates | 766 | -76% | 800 |
| Qatar | 647 | -6% | 698 |
| Japan | 255 | 43% | 255 |
| Kuwait | 104 | -15% | 104 |
| New Caledonia | 79 | 1521% | 79 |
| Papua New Guinea | 48 | -31% | 52 |
| Singapore | 40 | -11% | 40 |
| Nauru | 9 | 7% | 10 |
| Lebanon | 5 | -20% | 5 |
| Bahrain | 2 | -81% | 2 |
| Saudi Arabia | 1 | -93% | 1 |
| Kiribati | 1 | -42% | 1 |
| Oman | 0 | -97% | 0 |
| Malaysia | 0 | -94% | 0 |
| New Zealand | - | -100% | - |
| all other | 1 | | 0 |
| Total YTD Tonnes | 1,959 | -71% | 2,049 |

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 60 per cent lower in the period ending May 2021

Table 6. W/Mel export by transport mode

| | July to May | | |
|--------------|--------------|-------------|-------------|
| | Tonnes | share | change |
| Sea | 292 | 15% | -89% |
| Air | 1,667 | 85% | -60% |
| Total | 1,959 | 100% | -71% |

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