

Australian Melon Export – Monthly Update

June 2021



For the year ending 30 June 2021, Australian Melon exports recorded 13,046 tonnes which was 40 per cent lower compared to 2019/20, worth A\$26.8 million. Eighty-four per cent (10,933 tonnes) were musk melons and 16 per cent (2,103 tonnes) were watermelons.

The MAT was 13,046 tonnes, rising 2.6 per cent in the month indicating a positive momentum.

Musk Melons

By year end June 2021 musk melon exports were 10,933 tonnes worth A\$21.31m. The result was 27 per cent below the same period in 2020 (Table 1). Unit values were 11 per cent higher, and the overall value decreased by 19 per cent for the period.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	10,933	-27%
Value (M AUD)	21.31	-19%
\$ per kg	\$1.95	11%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 45 per cent to 4,470 tonnes and is the leading destination this year since Singapore declined 23 per cent to 4,277 tonnes. Hong Kong and UAE are both 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 196 tonnes exported by end June.

On a month by month basis exports in June were 770 tonnes compared to 468 tonnes last year being a strong improvement, though well below 2019 year. The lack of air freight capacity and the market access issue for New Zealand have impacted on the results in the year.

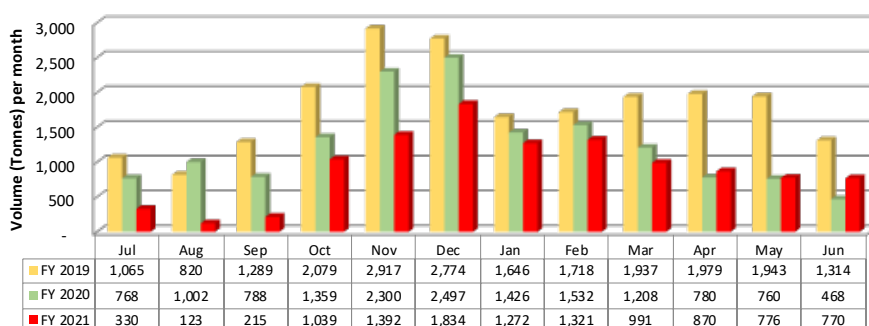
Table 2 : Musk Melon Exports by Market

Market	July to June		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
Japan	4,470	45%	4,470
Singapore	4,277	-23%	4,277
Hong Kong	644	-49%	644
United Arab Emirates	529	-64%	529
Malaysia	307	-39%	307
New Zealand	196	-91%	196
Qatar	156	-19%	156
New Caledonia	132	61%	132
Brunei Darussalam	117	34%	117
Papua New Guinea	59	-27%	59
Kuwait	22	-81%	22
Saudi Arabia	7	-83%	7
Canada	4	-10%	4
Nauru	4	58%	4
Fiji	3	-93%	3
all other	17		7
Total YTD Tonnes	10,933	-27%	10,933

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by annual volume MAT - Moving Annual Total
share of season 100.0%

Figure 1 Musk Melon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 38 per cent of export shipments and was 45 per cent lower in the 2020/21 year ending June.

Table 3. M/Mel export by transport mode

	July to June		
	Tonnes	share	change
Sea	6,858	63%	-6%
Air	4,197	38%	-45%
Total	10,933	100%	-27%

Watermelons

For the same period, exports of watermelons reached **2,103** tonnes worth A\$5.46m. The result was around 69 per cent lower than the 2019/20 year (Table 4). Unit values were 38 per cent higher to \$2.60 per kg and this has meant that the overall value has decreased by 58 per cent for the year (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	2,103	-69%
Value (M AUD)	5.46	-58%
\$ per kg	\$2.60	36%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension caused trade to fall from 2,314 tonnes last year to 27 tonnes. Trade to United Arab Emirates dropped by 74 per cent to 831 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 10 per cent below last year. The combined trade to the Middle East is 61 per cent lower at 1,621 tonnes influenced by lack of demand by food service operators and air freight restrictions.

Japan received 255 tonnes, although no trade since March. Japan was the No.3 destination for the year.

On a month by month basis exports were 166 tonnes in June, up 84 per cent on 2020 though well below previous years. The New Zealand suspension was lifted 16 March 2021 and the first 27 tonnes since the market reopened were recorded in June.

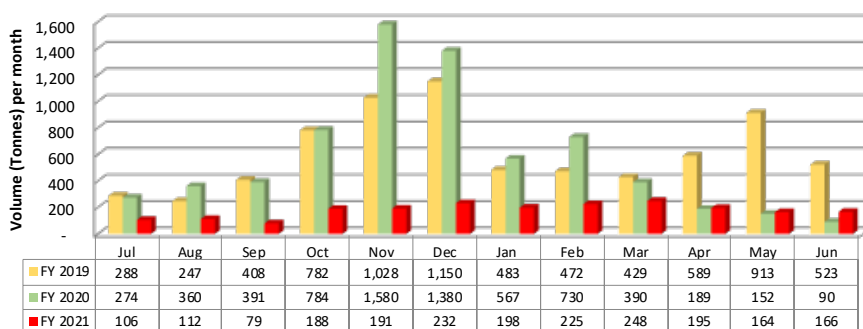
Table 5 : Watermelon Exports by Market

Market	July to June		
	2020/21	Chg LY	MAT
	Tonnes	%	Tonnes
United Arab Emirates	831	-74%	831
Qatar	669	-10%	669
Japan	255	43%	255
Kuwait	112	-8%	112
New Caledonia	86	1656%	86
Singapore	53	16%	53
Papua New Guinea	50	-33%	50
New Zealand	27	-99%	27
Nauru	10	11%	10
Lebanon	5	-20%	5
Bahrain	2	-81%	2
Saudi Arabia	1	-93%	1
Kiribati	1	-50%	1
Oman	0	-97%	0
Hong Kong	0	-57%	0
all other	2		0
Total YTD Tonnes	2,103	-69%	2,103

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Ranked by MAT MAT - Moving Annual Total
share of season **100.0%**

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Air freight accounted for 84 per cent of export shipments and was 58 per cent lower in the year ending June 2021

Table 6. W/Mel export by transport mode

	July to June		
	Tonnes	share	change
Sea	340	16%	-87%
Air	1,763	84%	-58%
Total	2,103	100%	-69%

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