

Australian Melon Export – Monthly Update

August 2021



For the first 2 months of the 2021/22 season, Australian Melon exports recorded 1,476 tonnes which was 120 per cent higher compared the same period last year, worth A\$2.88 million. Sixty-seven per cent (995 tonnes) were musk melons and 33 per cent (480 tonnes) were watermelons.

The Moving Annual Total (MAT) was 13,696 tonnes, rising 2.9 per cent in the month indicating a positive momentum.

Musk Melons

in 2 months to August 2021 musk melon exports were 995 tonnes worth A\$1.88m. The result was 120 per cent above the same period in 2020 (Table 1). Unit values were 19 per cent lower, and the overall value increased by 78 per cent for the period compared to 2020.

EXPORTS	YTD	Chg LY
Volume (tonnes)	995	120%
Value (M AUD)	1.88	78%
\$ per kg	\$1.89	-19%

Source: IHS Global Trade Atlas; Fresh Intelligence ana

Japan has increased 114 per cent to 179 tonnes and is the leading destination over the 12 months. Singapore increased 191 per cent to 458 tonnes. The UAE was 46 per cent lower at just 26 tonnes.

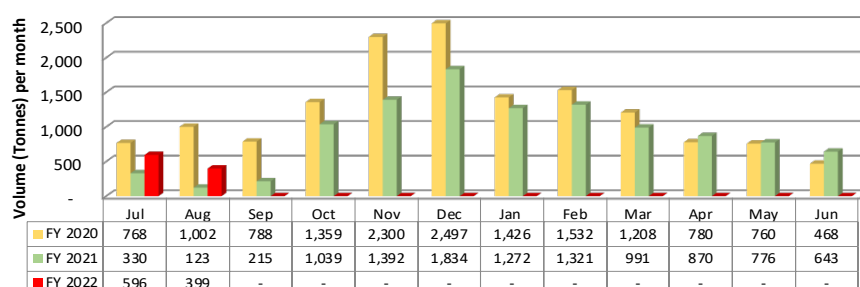
Trade to New Zealand is ramping up with 159 tonnes recorded in 2 months (Table 2). While trade has re started the levels are still less the half the levels in the pre suspension periods.

On a month by month basis exports in August were 399 tonnes compared to 123 tonnes last year and 1002 tonnes in 2019 prior to the New Zealand suspension. The lack of air freight capacity remains a key issue affecting trade to Middle East markets.

Market	July to August		Chg LY	MAT
	2020/21	2021/22		
	Tonnes	Tonnes	%	Tonnes
Japan	83	179	114%	4,531
Singapore	158	458	191%	4,525
Hong Kong	38	74	91%	566
United Arab Emirates	48	26	-46%	507
New Zealand	-	159	++	319
Malaysia	65	20	-69%	261
Qatar	16	17	10%	157
New Caledonia	19	40	110%	153
Brunei Darussalam	14	13	-2%	115
China	-	-		111
Papua New Guinea	9	7		57
Kuwait	0	-		22
Saudi Arabia	-	0		7
Nauru	1	1		4
Canada	-	-		4
all other	3	3		9
Total YTD Tonnes	453	995	120%	11,349

Source: IHS Global Trade Atlas; Fresh Intelligence ana ++ >500% increase
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 42 per cent of export shipments in July / August compared to 72 per cent last year.

	2020/21	2021/22
Sea	28%	58%
Air	72%	42%
Tonnes	453	995

Watermelons

For the same period to August, exports of watermelons were **480** tonnes worth A\$1.00m. The result was around 121 per cent higher than last year (Table 4). Unit values were 20 per cent lower to \$2.08 per kg and this has meant that the overall value has increased by 78 per cent for the period compared to the same period last year (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	480	121%
Value (M AUD)	1.00	78%
\$ per kg	\$2.08	-20%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis:

New Zealand access suspension impacted trade in 2020 and has restarted recording 246 tonnes. Trade to United Arab Emirates dipped by 12 per cent to 83 tonnes. These were the largest destinations in previous years.

Trade to Japan lifted 141 per cent to 45 tonnes, all in August.

Qatar is lower by 19 per cent to 55 tonnes. The combined trade to the Middle East is now 13 per cent lower at 172 tonnes for July and August.

On a month by month basis exports were 285 tonnes in August, compared to 112 tonnes in August 2020 though well below 360 tonnes in July 2019. The New Zealand suspension was lifted 16 March 2021 and is helping to see a return toward the 2019 levels.

Table 5 : Watermelon Exports by Market

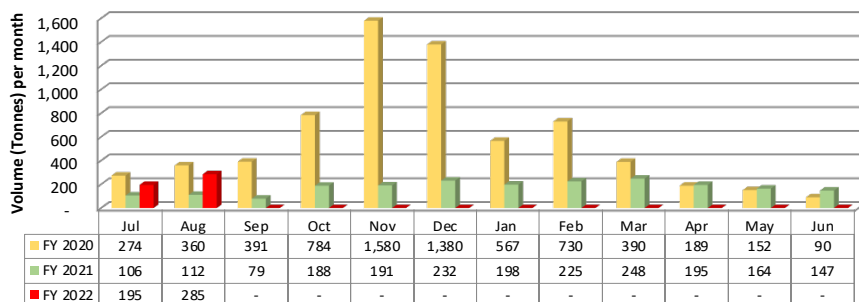
Market	July to August		Chg LY	MAT
	2020/21	2021/22		
	Tonnes	Tonnes	%	Tonnes
United Arab Emirates	94	83	-12%	811
Qatar	68	55	-19%	655
Japan	19	45	141%	281
New Zealand	-	246		264
Kuwait	8	8	0%	112
New Caledonia	10	34	236%	110
Singapore	0	-		53
Papua New Guinea	15	2	-87%	37
Nauru	1	2	43%	10
Lebanon	-	-		5
Saudi Arabia	-	3		4
French Polynesia	-	2		2
Kiribati	0	-		1
Oman	-	-		0
Hong Kong	-	0		0
all other	2	0		1
Total YTD Tonnes	217	480	121%	2,347

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 33 per cent of July – August export shipments compared to 74 per cent for the same period in 2020.

	2020/21	2021/22
Sea	26%	67%
Air	74%	33%
Tonnes	217	480

Prepared by Wayne Prowse Fresh Intelligence Consulting
wayne.prowse@bigpond.com 0408 164 966



This project has been funded by Hort Innovation using the melon research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au