

Australian Melon Export – Monthly Update

July 2021



For July 2021, first month of 2021/22, Australian Melon exports recorded 860 tonnes which was 97 per cent higher compared to July 2020, worth A\$1.56 million. Seventy-two per cent (621 tonnes) were musk melons and 28 per cent (239 tonnes) were watermelons.

The Moving Annual Total (MAT) was 13,314 tonnes, rising 2.1 per cent in the month indicating a positive momentum.

Musk Melons

For July 2021 musk melon exports were 621 tonnes worth A\$1.05m. The result was 88 per cent above the same month in 2020 (Table 1). Unit values were 18 per cent lower, and the overall value increased by 54 per cent for the month compared to July 2020.

Table 1 : Musk Melon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	621	88%
Value (M AUD)	1.05	54%
\$ per kg	\$1.68	-18%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 39 per cent to 116 tonnes and is the leading destination over the 12 months.

Singapore increased 205 per cent to 297 tonnes. The UAE was 86 per cent lower at just 6 tonnes.

The market access issue due to cucumber green mottle mosaic virus (CGMMV) impacted trade where exports to New Zealand through 2020 (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 July were 621

tonnes compared to 330 tonnes last year and 768 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.

Table 2 : Musk Melon Exports by Market
July to July

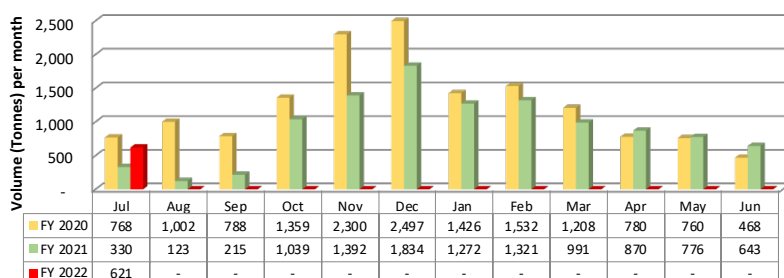
Market	2020/21	2021/22	Chg LY	MAT
	Tonnes	Tonnes		
Japan	83	116	39%	4,469
Singapore	97	297	205%	4,424
Hong Kong	26	37	39%	652
United Arab Emirates	45	6	-86%	490
New Zealand	-	112	++	273
Malaysia	45	11	-76%	272
Qatar	8	8	-4%	155
New Caledonia	11	19	78%	140
Brunei Darussalam	9	8	-6%	115
Papua New Guinea	3	5		61
Kuwait	-	-		22
Saudi Arabia	-	-		7
Nauru	0	1		4
Canada	-	-		4
Fiji	0	0		3
all other	2	1		6
Total YTD Tonnes	330	621	88%	11,097

Source: IHS Global Trade Atlas; Fresh Intelligence analysis; ++ >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 50 per cent of export shipments and in July 2021 compared to 66 per cent in July last year.

	2020/21	2021/22
Sea	34%	50%
Air	66%	50%
Tonnes	330	621

Watermelons

For the same period, exports of watermelons were **239** tonnes worth A\$0.51m. The result was around 126 per cent higher than July 2020 (Table 4). Unit values were 24 per cent lower to \$2.14 per kg and this has meant that the overall value has increased by 73 per cent for the month compared to the same month last year (Table 4).

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	239	126%
Value (M AUD)	0.51	73%
\$ per kg	\$2.14	-24%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension impacted trade in 2020 and has restarted. Trade to United Arab Emirates lifted by 54 per cent to 63 tonnes. These were the largest destinations in previous years.

Qatar is lower and offset some of the gains by the UAE though. The combined trade to the Middle East is 7 per cent higher at 96 tonnes for July indicating some return to pre 2020 levels.

There was no trade recorded to Japan in July. Japan was the No.3 destination for the 12 months to June.

On a month by month basis exports were 239 tonnes in July, compared to 106 tonnes in July 2020 though well below 274 tonnes in July 2019. The New Zealand suspension was lifted 16 March 2021 and should help to see a return toward the 2019 levels.

Table 5 : Watermelon Exports by Market
July to July

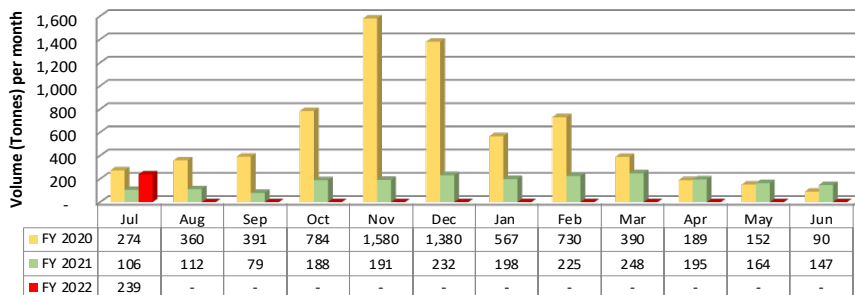
Market	2020/21	2021/22	Chg LY	MAT
	Tonnes	Tonnes	%	Tonnes
United Arab Emirates	41	63	54%	844
Qatar	43	28	-34%	653
Japan	-	-		255
New Zealand	-	125		143
Kuwait	4	4	5%	112
New Caledonia	8	15	93%	93
Singapore	-	-		53
Papua New Guinea	7	2	-78%	44
Nauru	1	1	92%	10
Lebanon	-	-		5
Saudi Arabia	-	-		1
Kiribati	0	-	-100%	1
Oman	-	-		0
Hong Kong	-	0		0
Malaysia	-	-		0
all other	2	0		0
Total YTD Tonnes	106	239	126%	2,217

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 41 per cent of export shipments compared to 85 per cent in July 2020. New Zealand trade was all by sea affecting the split

	2020/21	2021/22
	%	%
Sea	15%	59%
Air	85%	41%
Tonnes	106	239

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