

Australian Melon Export – Monthly Update

December 2021



For the 6 months to December of the 2021/22 season, Australian Melon exports recorded 7,791 tonnes which was 30 per cent higher compared the same period last year, worth \$15.7 million. Seventy-nine per cent (6,018 tonnes) were musk melons and 21 per cent (1,573 tonnes) were watermelons.

The Moving Annual Total (MAT) was 14,641 tonnes, falling 4.1 per cent in the month indicating a small loss in momentum with December results being lower than December last year.

Musk Melons

In 6 months to December 2021 musk melon exports were 6,018 tonnes worth A\$11.9m. The result was 22 per cent above the same period in 2020 (Table 1). Unit values were 1 per cent lower, and the overall value increased by 21 per cent for the period compared to 2020.

Table 1 : Musk Melon Key Measures

| EXPORTS | YTD | Chg LY |
|-----------------|--------|--------|
| Volume (tonnes) | 6,018 | 22% |
| Value (M AUD) | 11.90 | 21% |
| \$ per kg | \$1.98 | -1% |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Japan has increased 7 per cent to 2,598 tonnes and retained the leading position. Singapore increased 14 per cent to 1,884 tonnes. The UAE was 79 per cent higher to 142 tonnes though well below pre covid levels.

Trade to New Zealand continued to ramp up with 707 tonnes recorded in 6 months (Table 2). While trade has re started the levels are still well below the levels in the pre suspension periods.

On a month by month basis exports in December were 30 per cent lower to 1,280 tonnes compared to 1,834 tonnes last year and 2,497 tonnes in 2019 prior to the New Zealand suspension. Export trade over the next few months unfortunately is likely to continue to be impacted by the adverse weather conditions and impact on the pandemic on harvest labour.

Table 2 : Musk Melon Exports by Market

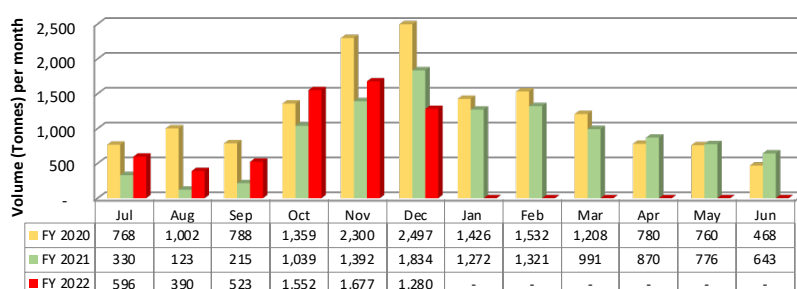
| Market | July to December | | Chg LY | MAT |
|-------------------------|------------------|--------------|------------|---------------|
| | 2020/21 | 2021/22 | | |
| | Tonnes | Tonnes | % | Tonnes |
| Japan | 2,417 | 2,598 | 7% | 4,617 |
| Singapore | 1,660 | 1,884 | 14% | 4,448 |
| New Zealand | - | 707 | - | 868 |
| Hong Kong | 270 | 415 | 54% | 676 |
| United Arab Emirates | 79 | 142 | 79% | 592 |
| New Caledonia | 22 | 89 | 314% | 200 |
| Malaysia | 197 | 58 | -71% | 166 |
| Brunei Darussalam | 56 | 51 | -8% | 111 |
| Qatar | 78 | 39 | -50% | 117 |
| Papua New Guinea | 32 | 24 | -27% | 51 |
| Saudi Arabia | 2 | 4 | 125% | 9 |
| Fiji | 2 | 3 | 63% | 4 |
| Vanuatu | 1 | 2 | 126% | 4 |
| Nauru | 2 | 2 | 11% | 4 |
| Lebanon | 0 | 0 | - | 1 |
| all other | 120 | 5 | - | 23 |
| Total YTD Tonnes | 4,934 | 6,018 | 22% | 11,891 |

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 49 per cent of export shipments in July to October compared to 39 per cent last year.

| | 2020/21 | 2021/22 |
|---------------|-------------|-------------|
| | | % |
| Sea | 61% | 51% |
| Air | 39% | 49% |
| Tonnes | 3099 | 4757 |

Watermelons

For the same period to December, exports of watermelons reached **1,573** tonnes worth A\$3.80m. The result was around 73 per cent higher than last year driven by the reopening of New Zealand (Table 4). Unit values were 6 per cent lower to \$2.41 per kg and this has meant that the overall value has increased by 63 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) | 1,573 | 73% |
| Value (M AUD) | 3.80 | 63% |
| \$ per kg | \$2.41 | -6% |

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

New Zealand access suspension impacted trade in 2020 and has restarted recording 717 tonnes, taking the market back to being the lead destination although still well below pre suspension levels. Trade to United Arab Emirates increased 50 per cent to 484 tonnes though again well below pre covid levels.

Trade to Japan dipped 8 per cent to 167 tonnes, with no measurable trade in December.

Qatar and Kuwait are lower and the combined trade to the Middle East is now 6 per cent lower at 670 tonnes for the 6 months to December.

On a month by month basis exports were 244 tonnes in December, compared to 232 tonnes in the same month last year, well below 1,380 tonnes in December 2019. October to February have been peak export months in past years.

Table 5 : Watermelon Exports by Market

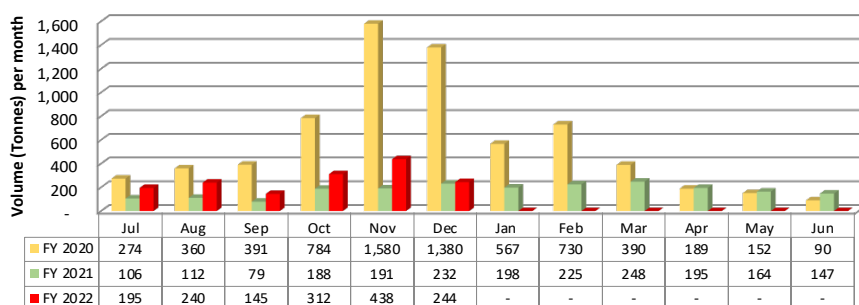
| Market | July to December | | Chg LY | MAT |
|-------------------------|------------------|--------------|------------|--------------|
| | 2020/21 | 2021/22 | | |
| | Tonnes | Tonnes | % | Tonnes |
| New Zealand | - | 717 | | 735 |
| United Arab Emirates | 324 | 484 | 50% | 983 |
| Japan | 181 | 167 | -8% | 241 |
| Qatar | 310 | 114 | -63% | 472 |
| New Caledonia | 14 | 32 | 141% | 105 |
| Kuwait | 34 | 20 | -41% | 98 |
| French Polynesia | - | 14 | | 14 |
| Saudi Arabia | - | 10 | | 12 |
| Papua New Guinea | 35 | 8 | -77% | 23 |
| Nauru | 5 | 5 | 4% | 10 |
| Lebanon | 1 | 1 | -3% | 5 |
| Singapore | 2 | 1 | -60% | 52 |
| Hong Kong | - | 0 | | 0 |
| Oman | - | - | | 0 |
| Malaysia | - | - | | 0 |
| all other | 2 | 0 | -100% | 1 |
| Total YTD Tonnes | 907 | 1,573 | 73% | 2,750 |

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 40 per cent of July – November export shipments compared to 85 per cent for the same period in 2020.

| | 2020/21 | 2021/22 |
|---------------|------------|-------------|
| Sea | 15% | 60% |
| Air | 85% | 40% |
| Tonnes | 675 | 1391 |

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

