Final Report

Market Intelligence Reports Melons Protocol Non-Protocol Markets

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Delivery partner:

Fresh Intelligence Consulting

Project code:

VM18005

Project:

Market Intelligence Reports Melons Protocol Non-Protocol Markets (VM18005)

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Public summary

During a period of significant disruption to the melon export trade the Market Intelligence Reports Melons Protocol and Non-Protocol Markets project has provided Hort Innovation and the Australian melon levy payers and exporters with robust market intelligence for melon trade in the main melon protocol and non-protocol markets that has helped the industry stakeholders to be informed to make strategic decisions for trade development to benefit all melon levy payers and exporters.

Melons are the 4th largest export category for Australian fruit and exports had been increasing to peak at 24,000 tonnes in 2019. The industry had gained access to Japan and continued to grow exports to New Zealand, Middle East and southeast Asian markets. Yet exporting was often off the radar for most growers with limited information circulated. Arguably the food safety scare in 2018 refocused the industry's interest toward exports.

The project involved 4 levels of market analysis released to Melons Australia and circulated via the industry website and melon e-news links.

1. **Monthly export updates** – released monthly for 19 months (Jun 2020 – Dec 2021) based on ABS trade data outlined monthly performance of melons export by product (watermelons and musk melons) by market showing monthly and year to date trends against previous years for volume and overall prices.
2. **Quarterly Export Reports** – released quarterly (June 2020 – June 2021, then December 2021) showing export performance on an annual basis with greater depth of analysis of volume, price and value trends over the course of 10 years to date, and insights to global trade trends showing Australia's position and performance relative to competitors.
3. **In depth market reports** – 4 reports were prepared involving interviews and analysis of the melon markets within targeted countries of interest – Japan, United Arab Emirates, Singapore and New Zealand. The reports considered the country demographics, market structures, melon import and distribution trends and insights from retail and food service interviewees regarding the acceptance of Australian melons in their markets.
4. **Global production and trade analysis** – a report that summarized the global markets for melons and international trade flows including focus on 6 markets of interest to Australian exporters, including the 4 markets covered by the in-depth analysis.

Highlights from the project included monitoring the growth of Australian melons in Japan that has informed the industry that Japan has not only become the largest export destination for melons, but Australia has also become the leading import supplier of melons to the market with the feedback helping growers and exporters to focus on meeting the Japanese market requirements. With the suspension of trade to New Zealand, at the time Australia's largest destination, the project helped Melons Australia clearly articulate the importance of the trade and the urgency to resolve the market access issues around the Cucumber Green Mottle Mosaic Virus (CGMMV) to enable trade to restart.

The COVID19 pandemic has impacted melon exports more than other fruit industries due the high level of air freight use and the high usage of Australian melons in the food service and cruise line sectors that decimated the trade in Singapore and Dubai. The industry has been well informed as to the impact and to help prepare for post pandemic trade recovery.

All industries that have an export focus appreciate the importance of timely export trade analysis and this project has helped the melon industry stakeholders to catch up to others with the ongoing use of analysis to inform further export strategies and tactical decisions.

Keywords

Export, melons, trade, analysis, statistics, Japan, New Zealand, Singapore.

Introduction

Access to trade performance information and the broader macroeconomic trading environment is essential to ensure that the melon industry remains informed on the issues and considerations that may affect current and future trade and market performance. Timely, analytical data insights enables industry to remain informed and improves capacity to make informed business and marketing strategic plans and decisions.

Market Intelligence reports will assist in the continued development of protocol and non-protocol export markets, Japan, New Zealand, Hong Kong, Singapore, Malaysia and UAE for Australian melons and create new opportunities for trading internationally with a greater capacity to make informed business decisions.

The Melon industry is already a significant exporter which has largely been driven by commercial businesses, however, to continue to grow the market for Australian melons there needed to be a coordinated and strategic approach. The collection of data and engagement with industry and all stakeholders enables Melons Australia to be well informed to guide further export development in the melon industry in protocol and non-protocol markets.

Globally only 3% of melons are traded internationally and Australian melons currently are the fifth largest exporter of fruits out of Australia with approximately 24,577 tonnes (2019) of combined melons exported and have been growing year on year. While exports had fallen to 14,000 tonnes in 2020 the project provided analysis for clarity around the downturn and the insights for rebuilding trade to pre 2020 levels.

Methodology

The project involved 5 levels of market analysis including weekly and quarterly / annual export analysis target market import market analysis and global trade analysis in a timely manner.

1. **Monthly 1 pager export update briefs**
   Initially 13, then extended to 19 x monthly two pager export update reports were produced within a day of data being released by the Australian Bureau of Statistics (ABS) covering trade volume and value to all markets for the latest month and season to date compared to the previous year, from June 2020 to December 2021.

   The two-pager format was a succinct dashboard and brief commentary to keep stakeholders informed with the most relevant data on seasonal export performance, with easy reading highlights for pertinent key messages.

   Information was downloaded by Fresh Intelligence from the IHS Global Trade Atlas database into an excel spreadsheet and used to create the critical tables and graphs in a consistent format. Fresh Intelligence added appropriate commentary to draw out the key messages from the data.

   An example of this report is shown in appendix 1

2. **Quarterly Export market Update analysis and market share positions**
   Initially 5, then extended to 6 x quarterly reports in greater depth that covered the trade and competitive positions in each strategic market, break down between watermelons and muskmelons, including trade from competitors and a market share and competitive index measure by quarter and annual 10-year history.

   Quarterly reports were produced to cover June 2020 (Fin year), September 2020, December 2020 (calendar year), March 2021, June 2021 (Fin year) and the December (calendar year)

   These reports covered greater analytic detail presented in easy-to-read tables, graphs and relevant commentary covering:

   - volume/value of import/export of products/price points to all countries (Singapore, Japan, Hong Kong, Malaysia and the Maldives as well as other key Middle East and Asian markets)
   - market share by trade source for Hong Kong, Singapore, Malaysia, key Middle East markets and the Maldives
   - year-on-year and long-term (10 years) trend analysis for muskmelons and watermelons by key markets.
   - Any other appropriate measurable derived from stakeholder engagement.

   The information was sourced from the ITC Trademap database and IHS Global Trade Atlas, FAOSTAT, World Bank, WTO and other sources.

3. **In depth market profiles - insight reports**
Initially 6, then reduced to 4 (with advice from Melons Australia) x market insights reports prepared by the in-market consultants in co-operation with the project leader, to review Japan, UAE, Singapore and New Zealand. Topics included:

- Geopolitical influences and market drivers including local production, climate and socio-economic influences
- The range of melons available in the retail market with pricing and packaging insights
- The supply chain networks, (retail and food service) and the needs of these channels
- Profiling major players (importers, retailers etc.)
- Import requirements and nuances that exporters will need to understand when trading.
- Trade analysis – derived from reports prepared in section 2.

The project leader collaborated with Austrade Japan and Market Intelligence Asia Pty Ltd to complete these reports who conducted interviews with in-markets retailers, importers and food service operators. Austrade and Market Intelligence Asia Ltd were subcontracted to this project.

The markets initially listed were planned and intended to be tied to the melon export plan though the project team responded to consultation after the initial meeting where it was deemed that Maldives and Korea were not necessary for in depth reports and to focus on markets that generated highest trade volume.

The benefits of in-market intelligence from Austrade and Market Intelligence Asia (in their markets of expertise) were:

- In-market direct knowledge of melon retail markets
- Existing relationships with both organisations and Fresh Intelligence and Melons Australia
- Photo images of melons in target markets
- Informed commentary from experienced in-market staff

4. **Global Trade Analysis**
With agreement from Melons Australia the Global Trade Analysis report was produced in place of 2 x additional in-depth market reports after the 4 most valuable markets had been covered. The trade report covered more demographic and market analysis for 6 markets and international trade flows and trends for melons, which mostly originate from Central America, to inform stakeholders of Australia's position in the global trade environment.

5. **Industry Engagement**
Engagement with industry stakeholders ensured that the reports were on target to address their needs to market the investment decisions that will benefit the wider industry.

- Initially Dianne Fullelove, former Melons Australia IDP was retained to enable effective engagement with levy payers, exporters and to manage distribution of monthly reports via the Melon E news to the industry levy payer and broader stakeholder network.
- Johnathon Davey managed the communications of the reports after he was appointed CEO and became familiar with the project.
- Monthly reports were disseminated via email to stakeholders and loaded to the export section of the Melons Australia website.
- In-depth reports and selected quarterly reports were (or will be) published in Melons News
- All reports were published on the Melons Australia website
- All reports have been available for Hort Innovation
- The reports were available to be used to inform state and commonwealth decision makers
- Report outcomes could be used to inform further decisions about market access requirements or change in export market requirements, including for New Zealand.
- Initially Dianne, and then Johnathon were conduits between levy payers and Fresh Intelligence to ensure that reports were suitable for levy payer use

Results and discussion

Australian melon exports have experienced a roller coaster ride in the last 2 years after reaching 24,000 tonnes in 2019 then falling to 12,890 tonnes worth $26.4 million in the 12 months to June 2021. Trade is now beginning to recover and the 12 months to December 2021 reached 14,641 tonnes. The suspension of Queensland trade by New Zealand in 2020 due to detection of the Cucumber Green Mottle Mosaic Virus (CGMMV) and followed by the impact of the COVID19 pandemic on tourist trade in Singapore and the UAE were two massive unforeseen disruptions.

Table 1 extracted from the December 2021 quarterly report shows the trade to 20 markets over the decade. Access to Japan was gained in 2015 and the trade has lifted to become the largest export destination in 2020/21 and continues to lead into the 2021/22 year seen in Table 2. The suspension of trade to New Zealand wiped off over 5,000 tonnes in one year and trade to the UAE plummeted 71 per cent as airline and cruise ship customers literally went into a hibernation state during the peak of COVID19.

Significantly the Food Safety scare over 2018 held far smaller impact on melon exports than media hype generated. For example, media around Indonesia banning Australian rockmelons made headline news in some areas even though there had been no measurable trade to Indonesia in the past decade. Industry stakeholders are better informed with good trade information and were able to navigate through the latest impacts.

Table 1. 10-year export trade summary

Australian Exports of Melons - July to June 2011 to 2021 Plus July - Dec 2020 and 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend	Jul - Dec 20	Jul - Dec 21	Change to 2020
	Value A$ Million	13.2	14.8	17.4	24.1	31.0	31.9	31.6	36.9	39.3	26.4	-32.7%	8%	12.2	15.7	28.9%
	Avg A$per kg	$ 1.37	$ 1.49	$ 1.48	$ 1.48	$ 1.61	$ 1.65	$ 1.56	$ 1.72	$ 1.80	$ 2.05	14%	5%	$ 2.09	$ 2.07	-1%
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			Tonnes	Tonnes	
1	Japan	-	-	-	-	-	165	498	963	3,259	4,690	44%		2,598	2,765	6%
2	Singapore	2,685	2,333	2,978	4,140	4,863	5,493	5,023	5,674	5,592	4,277	-24%	5%	1,662	1,885	13%
3	New Zealand	3,568	3,870	4,424	5,125	5,396	5,518	6,002	5,144	4,603	178	-96%	-28%	-	1,424	
4	United Arab Emirates	1,967	2,647	2,612	4,855	6,294	5,432	6,244	6,490	4,707	1,351	-71%	-4%	403	626	55%
5	Hong Kong	630	324	877	1,010	1,273	1,174	857	1,256	1,267	642	-49%	0%	270	415	54%
6	Qatar	63	94	51	129	264	362	463	652	935	823	-12%	33%	388	153	-61%
7	New Caledonia	108	63	69	64	90	194	158	139	87	218	151%	8%	35	122	247%
8	Malaysia	110	132	177	240	222	161	258	251	509	306	-40%	12%	197	58	-71%
9	Kuwait	66	22	38	129	266	213	207	319	241	134	-44%	8%	38	20	-48%
10	Brunei Darussalam	39	39	44	57	70	89	65	43	87	116	33%	13%	56	51	
11	Papua New Guinea	186	227	240	206	209	228	207	181	155	109	-30%	-6%	67	32	-53%
12	Saudi Arabia	39	63	44	113	92	62	25	72	59	8	-86%	-16%	2	15	677%
13	French Polynesia	-	5	0	22	49	22	46	75	38	-	-100%		-	14	
14	Nauru	2	28	71	27	3	2	5	8	11	13	19%	23%	6	7	6%
15	Lebanon	1	1	1	1	1	14	22	53	10	7	-33%	24%			
16	Fiji	11	8	16	19	30	37	47	31	48	3	-93%	-12%	2	3	63%
17	Vanuatu	9	7	8	6	5	4	3	0	2	2	35%	-14%	1	2	126%
18	Oman	-	-	-	-	-	-	40	7	32	1	-97%				
19	Kiribati	2	1	1	1	-	2	1	1	2	1	-40%				
20	Christmas Island	3	8	8	1	-	-	-	-	-	0					
21	Solomon Islands	-	9	6	6	3	2	1	0	1	0					
	all other	131	85	88	87	113	152	83	75	126	7	-94%	-27%	116	2	-99%
	TOTAL Melons (Tonnes)	**9,619**	**9,967**	**11,753**	**16,239**	**19,243**	**19,327**	**20,256**	**21,436**	**21,772**	**12,890**	**-41%**	**3%**	**5,841**	**7,591**	**30%**

Source : IHS Global Trade Atlas; Fresh Intelligence Analysis

While longer-term trend information demonstrates the rise and falls of various markets over the decade the annual reports and monthly reports provide more tactical information that inform the industry stakeholders about most recent performance and provide evidence-based data for decision making for promotion, pricing and market access negotiations among other topics.

Table 2. Melon Exports by Volume, Value and Unit Value 6 months to December 2021 vs 2020

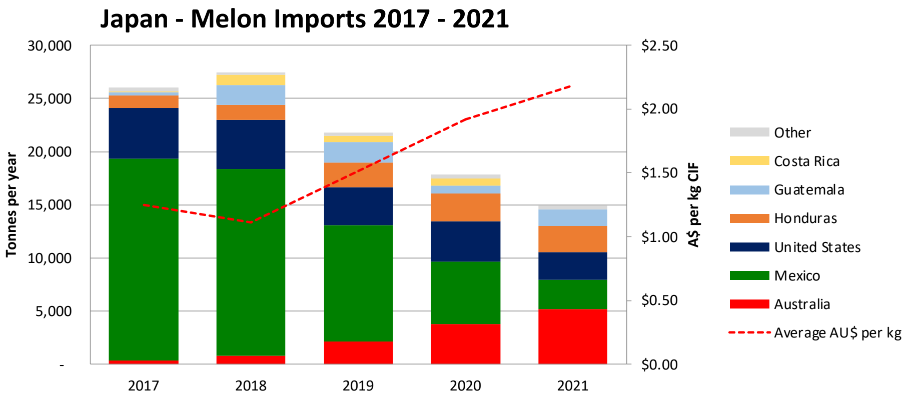
MELONS
Exports by Market

	Volume Tonnes (season to date)			MAT		Value $ Million AUD (season to date)			MAT		Average price per KG		MAT
Market	July to Dec-20	July to Dec-21	Change to LY	Jan-21 Dec-21	Share %	July to Dec-20	July to Dec-21	Change to LY	Jan-21 Dec-21	Share %	July to Dec-20	July to Dec-21	Jan-21 Dec-21
Japan	2,598	2,765	6%	4,858	46%	5.41	5.49	1%	10.08	35%	2.08	1.98	2.08
Singapore	1,662	1,885	13%	4,500	31%	2.78	2.91	5%	6.67	19%	1.67	1.55	1.48
New Zealand	0	1,424		1,602	24%	-	2.58		2.90	16%		1.81	1.81
United Arab Emirates	403	626	55%	1,574	10%	0.98	2.42	146%	4.68	15%	2.44	3.87	2.98
Hong Kong	270	415	54%	676	7%	0.54	0.83	55%	1.36	5%	1.99	2.00	2.01
Qatar	388	153	-61%	589	3%	1.35	0.66	-51%	2.29	4%	3.47	4.28	3.88
New Caledonia	35	122	247%	305	2%	0.07	0.31	339%	0.66	2%	1.99	2.51	2.16
Malaysia	197	58	-71%	166	1%	0.43	0.18	-58%	0.39	1%	2.19	3.14	2.37
Brunei Darussalam	56	51	-8%	111	1%	0.12	0.12	3%	0.26	1%	2.17	2.44	2.34
Papua New Guinea	67	32	-53%	74	1%	0.14	0.07	-51%	0.16	0%	2.10	2.19	2.15
Kuwait	38	20	-48%	116	0%	0.11	0.05	-59%	0.31	0%	2.95	2.32	2.71
Saudi Arabia	2	15	677%	21	0%	0.01	0.03	522%	0.06	0%	2.98	2.38	2.80
Nauru	6	7	6%	14	0%	0.01	0.02	26%	0.04	0%	2.22	2.64	2.84
French Polynesia	0	14		14	0%	-	0.02		0.02	0%		1.09	1.09
Fiji	2	3	63%	4	0%	0.01	0.01	-3%	0.02	0%	7.44		4.54
all other	117	4	-97%	17	0%	0.22	0.01	-96%	0.07	0%	1.89	2.19	3.88
TOTAL Melons	**5,841**	**7,591**	**30.0%**	**14,641**	**100%**	**12.18**	**15.70**	**28.9%**	**29.96**	**100%**	2.09	2.07	2.05

source : ABS via IHS Global Trade Atlas; Fresh Intelligence analysis MAT - Moving Annual Total

In depth market reports highlighted the performance of Australian melons in international markets of interest. Japan was the first market reviewed and the Japan customs data provided the evidence-based data to confirm the impact that Australian melons were having in the market and assisted decisions to invest in activities for the market. However, the data also shows that despite growth in market share, Australia is gaining a stronger share of a declining market and this situation will require a different approach to that in other markets.

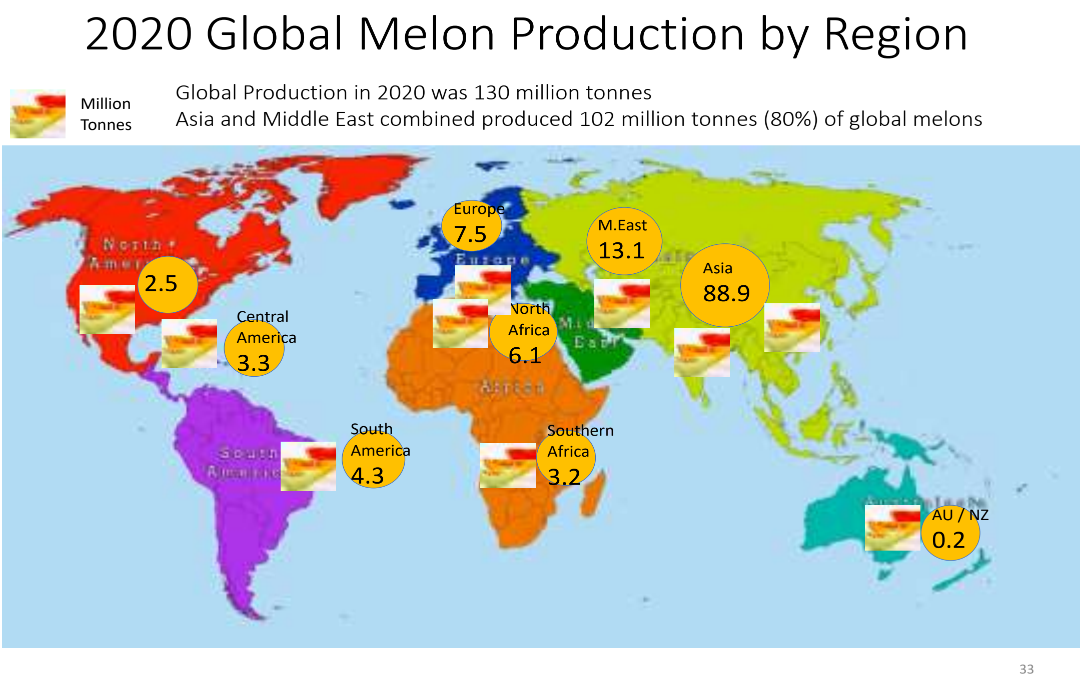
Figure 1. Melon imports by Japan showing supplier shares and the increase for Australia



Source: ITC Trademap; Fresh Intelligence analysis

The global markets and trade report quantified the global melon production areas and the fabric of major exporters and importers and trade routes. Indeed, Australia is a small player producing less than 200,000 tonnes in global market of 130 million tonnes most of which is produced in Asia and the Middle East. Iran and India are dominant competitors to Australia in the UAE. Singapore is dominated by melons supplied from Malaysia. New Zealand on the contrary has no other melons supplier except Australia and much less Tonga, and without Australian melons in the market there were essentially no melons. Aspirations to export to Europe or North America or even China are thwarted with a deeper understanding of global production and trade flows.

Figure 2. World Melon production by region



Source: FAOSTAT; Fresh Intelligence analysis

Outputs

Table 3. Output summary

Output	Description	Detail
19 x Monthly Reports	A monthly export update including monthly and year to date export status compared to last year	Produced monthly from raw data extracted from IHS Global Trade Atlas and circulated to export stakeholders and uploaded to the Melons Australia website. Refer Appendix 1 https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2022/02/December-monthly-uipdate.pdf
6 x Quarterly Reports	A quarterly report with greater detail by market with volume, value and unit value by market and state, with 10-year annual history	Produced quarterly from raw data extracted from IHS Global Trade Atlas and circulated to stakeholders via a link in Melon e news and uploaded to the Melons Australia website https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2022/02/VM18005-Dec-2021-Quarter-exports.pdf Refer Appendix 2
4 x In-depth Market Reports	4 in-depth markets (Japan, UAE, Singapore and New Zealand) involved interviews with in market importers and retailers to obtain qualitative insights aligned with trade analysis	Interviews with retailers and importers arranged by Austrade (Japan) and Market Intelligence Asia (UAE, Singapore and New Zealand) to obtain qualitative information around the performance of Australian melons in these markets, highlighting issues and recommendations for the Australian melon stakeholders to address for developing trade. Packaging, varieties, promotions, protocols, pricing and competitor performances were topics addressed. Refer Appendix 3 https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2021/11/VM18005-UAE-Melons-.pdf
1 x Global Trade analysis	A report reviewing global trade trends and updating latest import statistics and market shares in 6 markets of interest	This report was added to the final milestone after dropping two in depth reports and replacing with additional monthly and a quarterly / annual and some funds allowed producing a global trade report. The global trade analysis included updated market share and volume trends in target markets along with overview of global melon trade flows and trends from key competitors and the large global imports for context. A similar report was prepared by Fresh Intelligence for the 2020 melon conference.
M&E and Risk Register	Completed with MS102 outlines the verification and risk	Main risks were associated with timing of database updates, and all monthly and quarterly reports were completed in the timeframes The in-depth market reports were not delivered according to original time frames and were impacted by COVID19 lockdowns and market disruptions where it was prudent to wait until 1). A season of trade had resumed in New Zealand, and 2). Time had allowed some post covid disrupted trade to resume. Japan was the first to be completed.
Communications Plan	Completed with MS102	Communications with stakeholders was directed through Melons Australia, initially via Dianne Fullelove and then direct with the CEO when Johnathon was appointed. Reports on the Melons Australia website and supported by links in Melon e-news were the primary tool. Early in the project was introduced via media articles in several industry journals. Appendix 4
Milestone status updates	Updates listing the reports issued and highlights	MS 102 was delivered 31 March 2021 and covered all reports prepared on time to that date. The delays in the in-depth reports were flagged.

Final Report	Summary of the project activities	This Final Milestone was moved back from 31 August 2021 to 28 February 2022 due to delays in completing the in-depth reports and the interest from industry to maintain the monthly and quarterly reports for a further 6 months.

Photos/images/other audio-visual material

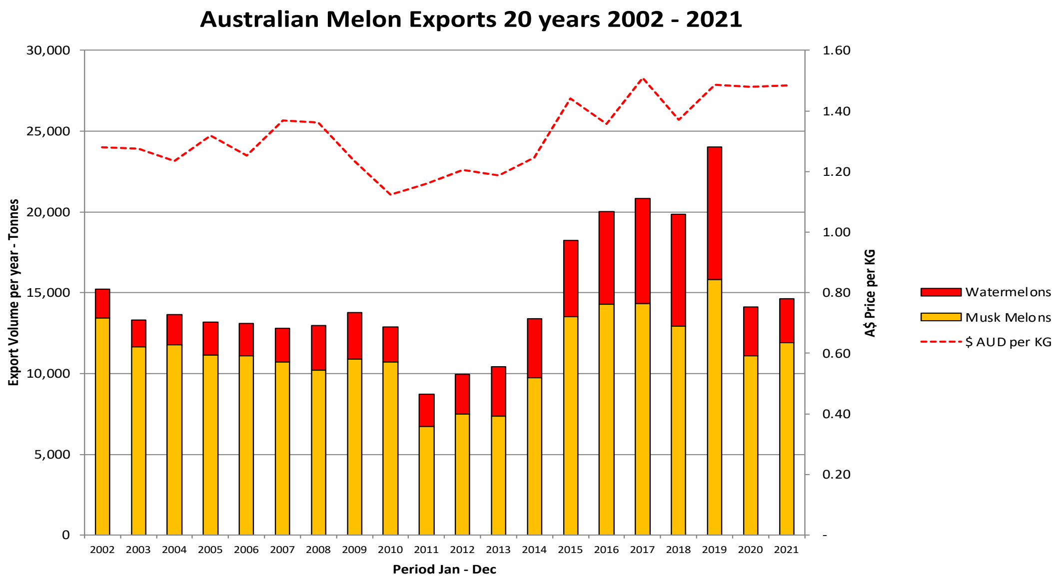
No photos or images to show

Outcomes

The project addressed Item 3 of the Melon Strategic Investment Plan 2017 – 2021 to develop and maintain export market opportunities, and specifically to support export market demand through timely and accurate data, information and market research.

At the time the project was initiated melon exports reached 24,000 tonnes (Figure 1) and seemed to be expanding. Price levels were also near the highest recorded and seemed realising the potential was continued growth following a trajectory of growth since 2011.

Figure 3.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Two separate and unforeseen disruptions severely impacted the growth trajectory in 2020

1. New Zealand suspended Queensland melons following the discovery of Cucumber Green Mottle Mosaic Virus (CGMMV) - New Zealand was the largest export destination at the time
2. COVID19 pandemic had a greater impact on melon exports than many other industries since the major customers in the other key markets – Singapore and United Arab Emirates - were cruise companies and airlines that were decimated by the pandemic.

Exports dived however the benefit of the project outputs – monthly and quarterly reports and in-depth analysis – meant that the industry stakeholders were well informed on the impacts on the industry and could use the data in negotiations with DAWE to urgently address the New Zealand issue. Precise knowledge of the situation in Singapore and UAE meant that the industry was able to respond more quickly as the market demand started to return, albeit still with a long way to go. The analysis meant that stakeholders were well informed to negotiate assistance with air freight (IFAM) mechanisms.

An almost surprise positive was the growth of melon trade to Japan that continues to increase as other trade collapsed. Industry could track the monthly growth to the point when Japan became the leading export destination, and the early in-depth analysis of the Japanese market has led to further projects that have addressed export market growth in the Japan market. The industry was also informed Australia's position reaching leading supplier status.

Table 4. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Assist industry stakeholders to make informed strategic decisions leading to realising the export potential of the Australian melon industry in the targeted export markets	This project addresses Item 3 of the Melon Strategic Investment Plan 2017 – 2021 to develop and maintain export market opportunities, and specifically to support export market demand through timely and accurate data, information and market research	The project equipped the melon industry stakeholders with essential data and insights to address the many challenges faced by the CGMMV impact on New Zealand trade and pandemic impact market demand and air freight capacity	Positive feedback from Melon Industry CEO, manifested in the request to continue more reports beyond the initial project life.
Inform melon growers and relevant industry people of export data and reports for key melon markets	As above	As above	As above

Monitoring and evaluation

Table 5. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
This project is in effect a form of monitoring and evaluation (M&E) program for the export development of Australian melon exports. Ultimately export growth will be a key measure.	All monthly reports delivered on time All quarterly reports delivered on time All reports loaded to the Melons Australia website as agreed In depth reports were delivered later than planned due to various reasons a. PRG initially did not want the analysis for countries listed in the export plan where trade was not occurring. b. Serious impact of the pandemic had on arranging in market interviews c. Decision to delay UAE and Singapore until some new season trade was evident d. Decision to delay New Zealand until conclusion of first season after suspension was lifted	The monthly and quarterly reports followed a similar format widely used in other industries with familiarity among exporters and industry leaders. Quarterly reports are not necessary and going forward a half yearly report (Dec and Jun) would be sufficient. Some industries work with one annual report though these are more suitable to short season industries whereas melons are exported all year round.
Ultimately export growth will be a key measure.	The growth of exports to Japan was a highlight and assisted by regular monitoring of trade via this project The overall decrease in trade from the impacts of CGMMV and the COVID19 were beyond the control of this project and the industry. However, the industry stakeholders are well placed armed with strong trade analysis monitor the recovery of post pandemic trade.	Continuous monitoring of export trade (volume, value and unit value) and of competitors and trends in the global environment will keep the industry stakeholders well informed and demonstrate that the industry is abreast of developments in eth export environment.

Recommendations

Market Intelligence and Insights has helped industry stakeholders be informed about the role that exports play in the melons industry and to have realistic expectations for future development and aspirations.

Melons Australia should continue to provide export analysis in a timely manner to stakeholders, either provided internally or outsourced.

Melons Australia should continue to engage with markets of interest through market visits and connections at major trade events such as Asiafruit Logistica to raise the profile and awareness of the Australian melon industry.

Refereed scientific publications

No scientific publications used

References

No references quoted

Intellectual property

No project IP or commercialisation to report

Acknowledgements

Dianne Fullelove – Fresh Growth Pty Ltd

Johnathon Davey – CEO Melons Australia

Kiyoko Ozawa, Cindy Lineburg - Austrade Japan

Alexandra Walker and John Hey - Market Intelligence Asia

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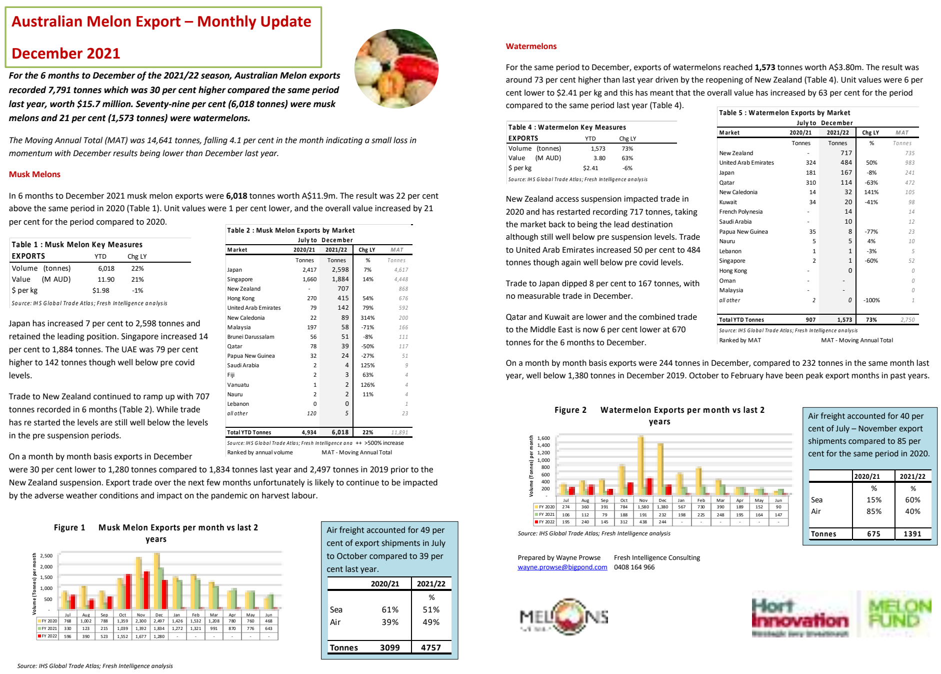
Appendices

Appendix 1

December 2021 monthly report - final of 19 monthly reports
https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2022/02/December-monthly-uipdate.pdf



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.

Table 2 : Musk Melon Exports by Market

Market	July to December 2020/21	2021/22	Chg LY	MAT
	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

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.

Figure 1 Musk Melon Exports per month vs last 2 years

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2020	768	1,002	788	1,359	2,300	2,497	1,426	1,532	1,208	780	760	468
FY 2021	330	123	215	1,039	1,392	1,834	1,272	1,321	991	870	776	643
FY 2022	596	390	523	1,552	1,677	1,280	-	-	-	-	-	-

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.

Table 5 : Watermelon Exports by Market

Market	July to December 2020/21	2021/22	Chg LY	MAT
	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

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.

Figure 2 Watermelon Exports per month vs last 2 years

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2020	274	360	391	784	1,580	1,380	567	730	390	189	152	90
FY 2021	106	112	79	188	191	232	198	225	248	195	164	147
FY 2022	195	240	145	312	438	244	-	-	-	-	-	-

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
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Appendix 2

Cover of December quarterly report
https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2022/02/VM18005-Dec-2021-Quarter-exports.pdf

MELONS AUSTRALIA

Hort Innovation
Strategic levy investment

MELON FUND

Australian Melon Export Report

July 2021 to December 2021

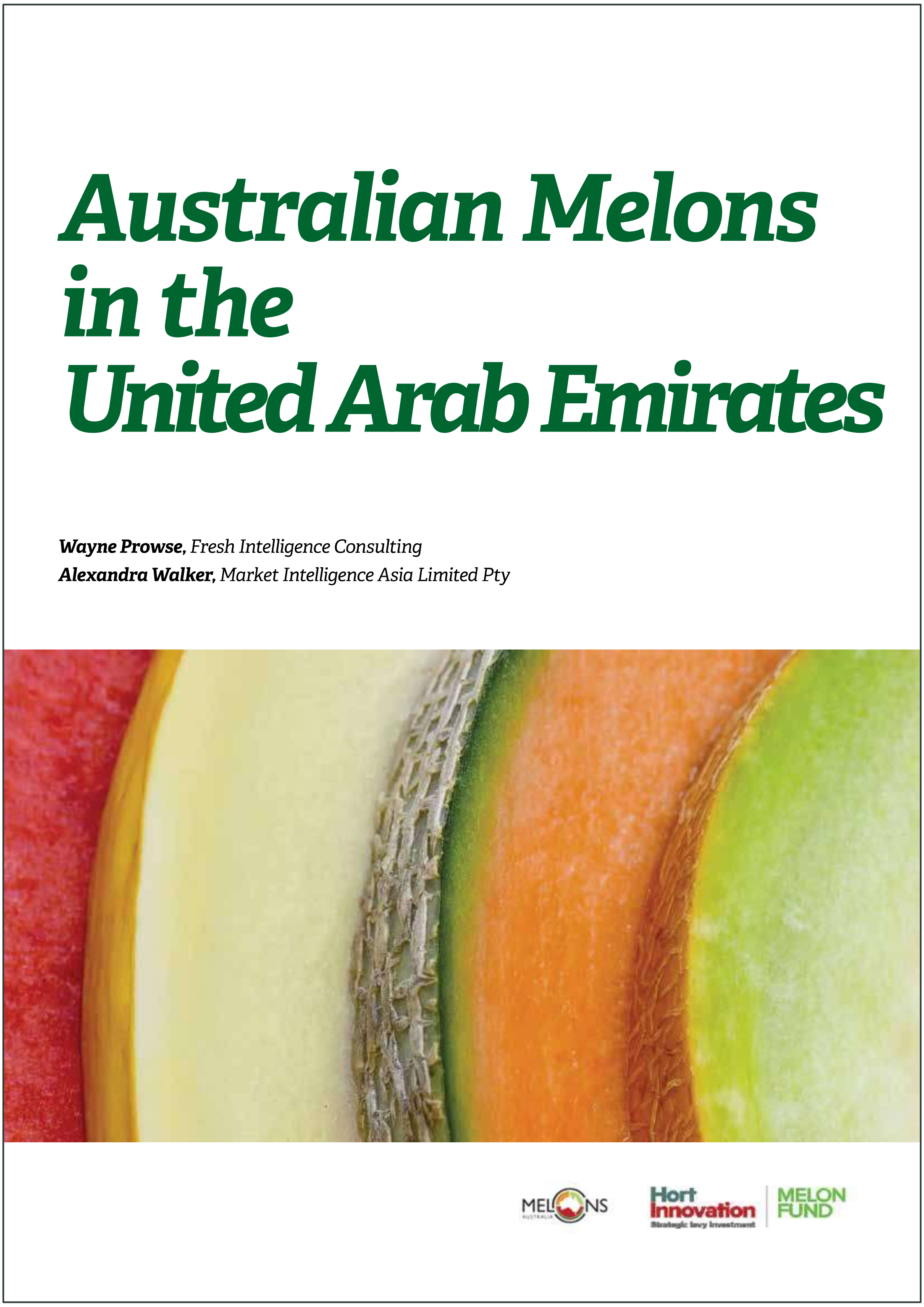
Prepared by
Wayne Prowse
Fresh Intelligence Consulting

For
Hort Innovation
Melon Fund
11 February 2021

Appendix 3

Cover of UAE in depth report – November 2021

https://secureservercdn.net/198.71.233.33/exm.9c1.myftpupload.com/wp-content/uploads/2021/11/VM18005-UAE-Melons-.pdf



Australian Melons in the United Arab Emirates

Wayne Prowse, *Fresh Intelligence Consulting*
Alexandra Walker, *Market Intelligence Asia Limited Pty*

Appendix 4

Example Melon News articles

Australian Travellers are "Biosecurity Champions"

As part of a broader biosecurity project, Melons Australia has developed a three-part video series to highlight the role that travelling holiday makers can play in maintaining strong on-farm biosecurity.

Launched in September 2020, the animated and easy-to-understand videos were funded by Department of Agriculture Water and Environment (DAWE) under the Biosecurity Champions project. The videos have been initially targeted for growing regions in the Northern Territory, Western Australia and Queensland where harvesting is conducted from August through to December.

The videos can be viewed on **Melons Australia website**: **melonsaustralia.org.au/consumer-travelling-in-melon-regions/**, or **Melons Australia's YouTube channel**— search "Melons Australia".

The campaign is ongoing with posts aligning with production seasons throughout the country. To date the videos have reached more than 10,000 people via Facebook.

Find out more: Contact Melons Australia Biosecurity Officer **Joanna Embry**
E: biosecurity@melonsaustralia.org.au

New Melon Export Reports

By Dianne Fullelove, Fresh Growth

Making export decisions has just become a whole lot easier for Australian melon growers with the commencement of a new melon-levy funded Hort Innovation project to provide monthly and quarterly insights into export pricing and quantities. Melon growers can now have the most up-to-date analysis of trends in key export markets to provide the insights they need to understand and consolidate their export markets, while expanding into further markets.

VM 18005 Market Intelligence Reports Melons (Protocol & Non-Protocol Markets) will provide market intelligence for melon trade in the industry's main protocol and non-protocol markets. The project will provide 13 monthly export updates and five quarterly reports in greater depth to track Australian melon export trade and competitive positions in strategic markets.

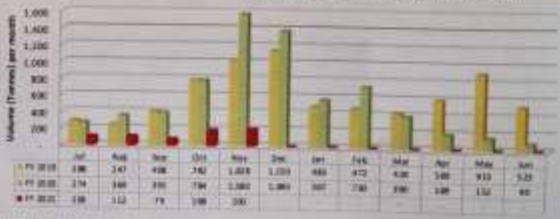
In addition to the data reports, an innovative set of targeted market insights reports, with input by in-market specialists, will be available to growers and exporters. These specialised reports aim to increase industry understanding of factors that influence trade opportunities as the industry regains traction after the challenges of 2020.

The project is led by Wayne Prowse from Fresh Intelligence Consulting. Wayne is well known in the horticulture trade environment and has been involved in delivering strategic trade analysis and direction for the fresh produce industry for many years. Wayne is passionate about making sense of evidence-based data to assist melon growers in making effective export decisions.

Reports are available on the melon website at **www.melonsaustralia.org.au/melon-export-resources/**. The project is expected to continue until August 2021.

Example figures from November 2020—Monthly Update

Figure 2 Watermelon Exports per month vs last 2 years



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Table 4 : Watermelon Key Measures

EXPORTS	YTD	Chg LY
Volume (tonnes)	684	-80%
Value (M AUD)	1.85	-70%
$ per kg	$2.70	46%

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Find out more:
Contact Wayne Prowse, Fresh Intelligence Consulting | Email: wayne.prowse@bigpond.com

Hort Innovation | MELON FUND

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