

OVERVIEW GLOBAL MELON AND WATERMELON MARKET

The supply of melons in the northern hemisphere currently comes from the southern hemisphere. In this market, Latin America has the most dominant position but the supply is erratic. Spanish growers have observed a drop in the Brazilian volume, Belgium has recently been flooded with melons and Dutch importers fear that the delayed supply from Costa Rica will hit the market all at once. US and Chinese traders are not as concerned. The markets are stable. Australia is committed to extending the season and also targets the international market. In South Africa there is a threat of oversupply after many growers switched to watermelon cultivation as a result of the successful previous season.

Sicilian growers relieved

In the Licata region of Sicily, which is known for its Red Falcon Cantaloupe melons, the preventive measures enforced to stop viruses have been shown to be effective. Non-woven covers and insect netting have proven to be successful measures to combat the spread of the whitefly. After concerns in December and January, the situation has now improved. The fruit is the size of an orange and the harvest is scheduled for April.

On the wholesale market there are melons from Brazil and Morocco available. Prices vary depending on the packaging, country of origin and variety. Brazilian musk-melon costs 1.90 Euro per kilo, while Moroccan musk-melon, size 5/6, stands at 2.90 Euro per kilo. The Charentais, from different countries and in 4 piece packs, cost 4 Euro per kilo. Brazilian yellow melons, in packs of six, have a price of 95 cents per kilo.

Spain: Rising prices, dip in supply

Brazilian Piel de Sapo melons dominate the Spanish market. This is the most consumed melon in Spain and Brazil is one of the few countries in Latin America where the variety can be grown. In the summer, watermelons are also popular, but this supply is mostly local. Early in the

season, in March and April, there is room for imports from Senegal, where Spanish companies are investing.

The weather was favourable during the Brazilian season, but now torrential rains are causing the production to fall and prices are rising quickly, following the stability recorded in January. In the past 15 days, the supply has dropped by 40% and demand has increased.

Spanish breeders are currently working overtime because growers have started planting. Over the last two years, many growers switched to watermelons, as these generated a higher profit. How things will turn out this year in that sense is still uncertain.

France imports from Africa

The first melons from Senegal and Morocco have hit the French market. The supply consists mainly of Charentais melons at a price of 2.80 Euro.

Netherlands: Costa Rican supply delayed. Will everything arrive at the same time?

The melon market is currently facing delays in the Costa Rican supply due to bad weather. As a result, particularly as regards watermelons and Cantaloupe melons, the supply is very limited. Honduras has sufficient supply of Galia, but is unable to fill the gap with Cantaloupe melons. Brazil is still shipping yellow melons, resulting in some overlap with the Costa Rican. The price of yellow melons, which stands at 9 Euro, is still reasonable, but due to the large volumes, sales are not really at a high level. There are sufficient Galia melons from Honduras, although their quality is already a bit disappointing. Their price (currently 5-6 Euro) also remains low. Within a few weeks, importers fear some panic in the market, as all the delayed fruit may arrive to the European market at the same time.

Belgium flooded with melons

Brazil shipped an excessive volume of melons to the Belgian market, so prices fell. An importer estimates that the European market can handle about 100 containers per week, but for a few weeks, up to 180 containers were arriving. "Of course, consumption can sometimes increase

or decrease, but the impact of this is minimal." Price-wise, the campaign has been disappointing. During most of the season, watermelon prices have stood at 60 cents; currently, the price has gone up to 1.30 Euro. This was a necessary price increase, as traders have been losing money during much of the campaign. The prices for the Cantaloupe, yellow and green melons have also been disappointing. Only those of the Charentais reached pretty good levels. Besides Brazil, Honduras and Guatemala are also on the market.

Norwegians want watermelons, but only in summer

Due to the cold weather, there is hardly any demand for melons. Watermelons are the undisputed favourite amongst Norwegian consumers, according to a trader. An importer explains that the demand for other melons and for smaller varieties is limited to the high season (summer). Spanish watermelons are usually the most demanded when in season, between May and September. At present, the import season from Ecuador is developing without major issues.

Chinese prices peak after storms

In the winter months, the melon supply comes from Hainan, a tropical island in the south of the country. Prices have increased in recent weeks and are soon expected to reach their peak. The cause of rising prices is the damage caused by typhoons in the second half of the year. The storms damaged the crops; however, growers have invested in new plantings, so the price is expected to decline again in the coming months as production gets going again. During the winter months, there are also watermelon imports from the country's southern neighbours. The majority of these shipments are made by road. In the summer months, melons are grown in all major agricultural provinces of the country, namely Shandong, Shaanxi, Henan and Shanxi. Both watermelons and several Musk melon varieties enjoy great popularity.

Australia: Season extension and exports

There are two distinct situations in this vast country. In Queensland, to the east, it is extremely hot; in the west, however, it is wet. A trader and grower from Hamel, in the west, says that the market is recovering after the wet start of the season. Although it is still early in the campaign and despite the wet start, prospects point to a good season. A grower explains that they are studying whether it could be possible to grow melons further north, as this would allow for the season to be extended. If cultivation in the Carnarvon region gets going, the trader could offer a year-round melon program. The season in Hamel lasts from January to May, and Carnarvon could cover the market during the other months.

On the domestic market, the supply is on the rise, so growers are increasingly interested in exports. This season, Japan has opened the market for Australian melons.

Stable market in the US

At present, there is supply from Central America, mostly from Guatemala, Honduras and to a lesser extent, Costa Rica. The supply of these melons usually goes on from November to late April. From May to November there is domestic product. Domestic cultivation takes place mostly in California and Arizona.

The winter melon campaign is stable. Volumes are smaller than in the summer months, when the market is traditionally good. As regards imports, it is cheaper on the east coast to bring the fruit from Honduras than from Mexico. Consequently, Mexican exporters look more at the West Coast to find buyers for their melons.

South Africa: Threat of oversupply after a good year

There are no accurate figures about the melon market, since they are not tracked. According to estimations, some 2 million melons are traded annually through Tshwane Fresh Produce Market, but this does not include direct deliveries to supermarkets and traders through other markets. A considerable amount of watermelons, about 40% of all sales, are sold by street vendors in the aforementioned trade market.

The season starts in mid-September in the north of the country, near the border with Botswana and Zimbabwe. Watermelons from Free State, Western Cape and Eastern Cape are available between mid-December and February. The season comes to an end around April.

The prices were exceptionally high last year because of the drought. The quality of the watermelons was good because of the dry conditions, as diseases had no chance to spread. The season was unnaturally long and the demand was high. This attractive market attracted many growers to the watermelon market, so a large volume is expected this year. Since Christmas, however, some rains have been recorded, which can result in greater pressure from diseases and a lower demand. This year, prospects point to an oversupply and to lower prices than last year.

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