

# OVERVIEW GLOBAL MELON MARKET

The European melon and watermelon season is approaching its end. For most growers, this is a welcome thought. The hot weather in most parts of Europe resulted in an earlier production, which led to many production areas hitting the market at the same time. However, the high temperatures didn't help increase the consumption. This resulted in a difficult market. There seems to be room in the market for the first Brazilian melons, because Spanish melons are quickly running out. The season is also coming to an end in North America, where growers have faced similar problems, although it was actually the cool weather in Ontario that had the biggest impact.

## Ukraine sees opportunities on the European market

Late watermelons, such as the Krimson and black watermelons, are still in production. These melons are available until October, so the export season will last for another six weeks. The first frost in October will mark the end of the season.

Unusually hot weather gave a push to the domestic demand, and as a result, 99% of the production was sold in the domestic market. In addition to the higher demand, the heat also caused problems. Half of the production in August was damaged. This caused problems to exporters, because the quality proved unpredictable. The issue has already been resolved and exports have resumed. Major markets include Poland, the United Kingdom, Lithuania, Latvia, Belarus and the newest market: the Netherlands. Next season, there will also be exports to Estonia and Sweden.

## "Unusual season" in Spain

The season is quickly coming to an end due to the constant heat. It has been hot in Spain since June and this has considerably accelerated the harvest. The Galia season will finish particularly quickly. According to many in the sector, this is one of the worst seasons ever, with prices during the entire campaign far below production costs. The heat caused the crops in the different production areas to overlap. This, in combination with a low demand, resulted in a difficult season with retailers pushing prices down. From mid-August, only the region of Castile-La Mancha remained on the market. The supply is limited, while prices are on the rise. "It's an unusual season," states a trader. "When there were melons available, nobody was buying them, and now that the supply drops, the demand

increases." He compares the volume of Piel de Sapo melons available in the market with that of the same week a year earlier. "There is up to 50% less available." The season runs until the end of September. The prices at origin currently stand between 60 and 70 cents.

#### **Italy: Warm summer does not result in high demand**

Although the season started well, with not too large volumes, prices have not been good this season. The high temperatures, which normally give a boost to melon consumption, did not increase the demand. "I think the supply was so plentiful that sales did not compensate for the volumes marketed by growers," affirms a trader. He argues that the product's oversupply is the main reason for the low prices. The drought was not a problem, according to a grower, because he only cultivates melons when water is available.

Another trader added that "like in previous years, the increase in the production of Cantaloupe melons, yellow melons and mini watermelons was good, except for some irregularities in their consumption in May and June and the weather conditions in Northern Italy, which took a toll on the consumption."

The watermelon season is already coming to its end, as reported by Ismea in week 35. The supply was in line with the demand and prices did not undergo major fluctuations. As the supply decreases, the price rises slightly. This applies especially to the Ferrara region.

#### **Bad summer for French melons**

The season was "very difficult and complicated" this year. July and August were especially difficult months due to an oversupply on the market. It was hot early in the year, which resulted in all production areas hitting the market at the same time in July. As a result, French crops clashed against Spanish imports. The demand was good and the consumption stable, but the volume was higher and the price was low compared with last year. Some of the volume was not even marketed because the market was saturated. For the past few weeks, the market situation has improved. The season will finish by the end of September. The demand for the summer fruit drops with the arrival of autumn products.

### **Dutch market weak during summer months**

The Spanish melon season is now coming to a close. Due to the persistent heat from June, the harvest was significantly advanced. Galia melons are now the first to encounter problems in terms of quality and volume for their export. The Cantaloupe will follow soon, and the Spanish supply of yellow melons, watermelons and Piel de Sapo will soon fall, as well.

Importers are looking back on a tough Spanish melon season. In general terms, the market has been weak throughout the entire summer. There was a fairly large production, which, combined with disappointing weather in the destination markets, resulted in a difficult season. At this time, Spain's supply volume is quickly falling, and imports from other producing countries, including the watermelons from Italy and Hungary and the Cantaloupe melons from Italy and France, are increasingly reduced.

There is thus room for Brazilian melons and there will first be a demand for quality Galia, which is the one that retailers are now really waiting for. It is still near impossible to predict how the Brazilian melon season will go, as the melon market remains highly weather-dependent. In recent years, we have seen Brazil put a lot of pressure on the European market with large volumes. "If such great volumes are shipped again, I don't see how that will change," explains a trader. At least, prospects at the start of the season are optimistic. The conditions for the crop's cultivation have been good, even though the drought, among other factors, is not making the production process in Brazil any easier.

### **US: Demand for Cantaloupe rises in autumn**

With the start of the school year, the watermelon market is declining. "The supply of watermelons is fine," states a retailer. Just like the supply, the demand is also limited. There are currently melons from Ontario on the market, but that season will end soon. Prices are under pressure, but a trader predicts that they will improve as the season moves from Indiana to Texas and Florida. That prices then rise is mainly due to the longer shipping times.

The demand for watermelons peaks in July and August. In September, the demand shifts from watermelons to mini watermelons. "The choices change and consumers change their behaviour at this time of the year." For example, the consumption of Cantaloupe melons is low in the summer months, but increases in the autumn. Many growers are happy that the season is over. Due to the cold weather early in the year, there were quality problems, although the sizes and yield have been higher than expected.

### **Australia: Cool weather affects consumption**

Production in Northern Australia is on the rise, with a good supply of watermelons and melons from Kununurra in Western Australia, Northern Territory and Northern Queensland. Due to the high supply and low temperatures in the south of the country, prices do not reflect the quality of the fruit.

The most commonly grown melons in Australia are seedless watermelons and Cantaloupe melons. Green and white-fleshed honey melons are also popular. In recent years, the Piel de Sapo has been gaining ground, as well. Growers play their part in this with the planting of these varieties.

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