

Fresh fruit and vegetables:**The EU market for mango****Publication date: April 2009****Report summary**

This CBI market survey discusses the EU market for mango. The main findings are listed below.

- Consumption of mango in the EU has among the lowest consumption levels in the world, but the EU market is growing quickly. Between 2003 and 2007, consumption increased 7% in value annually. According to projections from the FAO (2006), net import volume into the EU is expected to grow 2.5% per year until 2014.
- The United Kingdom (UK), Germany and Belgium recorded highest growth rates in apparent consumption, while in Portugal it decreased. The consumer markets in Germany and the Netherlands stagnated in 2008.
- UK and France are the largest markets. These countries have large ethnic minorities that are familiar with mangos. Consumption of exotic fruit is growing in every country.
- As consumers get more acquainted with mangos, preferences are shifting from nicely coloured but fibrous varieties, towards less fibrous varieties.
- The market for ready-to-eat mangos (pre-cut and packaged) is small but growing quickly.
- The EU market relies almost completely on imports. Between 2003 and 2007, imports of mangos increased 47% in value and 32% in volume. There is an extensive and growing inter-EU trade in mangos in the EU, with a few EU countries acting as suppliers.
- Developing countries (DCs) accounted for 84% of the imports of mangos into the EU. The origins are diverse as the supply of mangos is seasonal. Imports from Brazil decreased sharply. Imports from South Africa also decreased, while imports from Peru increased. Some upcoming DC suppliers are Pakistan, India and West African countries.
- Imports from other countries outside the EU grew more quickly than imports from DCs. Israel became an important supplier of mangos, especially to France.
- The Netherlands is the leading importer and distributor of mangos in the EU. The UK and France are also large importers and have large consumption markets.
- Supermarkets are the main outlet for mangos and now provide a year round availability. The trade in mangos is not as concentrated as in other tropical fruits, such as bananas or pineapples. Many importers are involved in trading mangos.
- Mangos are imported into the EU by own-buying groups and by independent importers. As supermarkets often work with preferred suppliers and demand large quantities, their buying groups are usually less interesting for exporters from DCs.

This survey aims to provide exporters of mangos from DCs with product-specific market information about gaining access to the EU market(s). By focusing on the EU market(s) for one product, this document provides additional in-depth information, that is complementary to the more general information and data provided in the CBI market survey 'The fresh fruit and vegetables market in the EU', which can be downloaded from <http://www.cbi.eu/marketinfo>.

Detailed information on mango is given in appendix A. This survey discusses the EU in general and the following markets in particular: the Netherlands, the UK, France, Germany, Belgium and Spain.

1 Market description: consumption and production**Consumption**

Mangos are one of the faster growing exotic fruits in the EU. Consumption of mango in the EU is still among the lowest levels in the world. The average consumption of mango worldwide is 3.42 kg per person per year. The highest consumption level is in Asia, followed by Latin America, Africa, Australia (MINECO, 2007).

The United States of America (USA) and the EU have the lowest consumption levels, but the EU market is expected to grow much more quickly. According to projections from the Food and Agricultural Organisation (FAO, 2006), net imports by the EU will increase to 224 thousand tonnes in 2014, an annual increase of 2.5%. The USA market is expected to increase 1% per year, and worldwide mango imports are expected to increase 1.4% annually until 2014.

In 2007, the total apparent consumption¹ of mangos in the EU was 202 thousand tonnes, with a value of €248 million (Table 1.1). Average consumption per person was 0.40 kg per year. Between 2003 and 2007, consumption increased 31% in value (7% annually) and 27% in volume. The markets in the UK, Germany and Belgium experienced strongest growth in value and volume between 2003 and 2007. The Portuguese market decreased in this period, and the Dutch market decreased in value, but increased in volume.

Table 1.1 Apparent consumption of mango, 2003–2007, value in million euros and volume in thousand tonnes.

	2003		2005		2007	
	Value	Volume	Value	Volume	Value	Volume
Total EU-27	190	159	203	183	248	202
United Kingdom	35	32	49	46	72	56
Germany	30	29	37	32	47	41
France	36	22	44	22	39	22
The Netherlands	41	28	21	31	31	32
Portugal	19	20	19	16	18	14
Spain	8	7	7	9	9	10
Belgium	4	3	2	3	6	4

Source: Eurostat, 2007, 2008

The **UK** is the largest market for mango in the EU, accounting for 29% of the EU consumption value in 2007. The UK was the strongest growing market for mangos, with a growth rate of 109% in value (20% per year) and 75% in volume (15% per year) between 2003 and 2007. Mangos are available in supermarkets all-year round. Tommy Atkins is the most popular, accounting for 80% of the sales in supermarkets, but is increasingly replaced by other varieties. Though the largest growth in consumption occurred a few years ago, the demand for mangos is still rising. The UK's ethnic minority groups, notably Indians and Pakistanis, are a major driver behind the increased demand. As more native British consumers are exposed to exotic fruits, the demand may rise further. Demand for exotic fruit is rising (AGF, 2008).

Germany accounts for 19% of the EU consumption value in 2007. Between 2003 and 2007, consumption increased 58% in value and 40% in volume, an average annual growth of 12% in value. While mangos are still a minor product in Germany, their availability has increased over the years, especially since discounters introduced them in their stores. In 2008, demand decreased and sales of mangos in Germany dropped. This might be caused by high prices for mangos this season, in combination with a large supply of summer fruits (AGF, 2008).

With 16% of the consumption value in the EU in 2007, **France** is the third consumer market. Consumption has not increased much since 2003. Consumption increased 8% in value and 1% in volume. As in the UK, ethnic minorities are an important driver behind the increased consumption of exotic fruit in general and mangos in particular. Popular species are Osteen, which originally comes from Spain, and Kent Tommy Atkins and Haden, which stem from Brazil. Sales of exotic fruits are expected to continue to increase as more consumers become interested in new, non-native, dishes and products.

The Netherlands is the fourth EU market, accounting for 13% of apparent consumption. The Netherlands is a major trader in mangos. Dutch imports of mangos are the largest in the EU, with most of it being exported to other EU countries (Chapter 3).

¹ Calculation based on data from Eurostat (2007, 2008) and the Food and Agriculture Organisation (2008). Apparent consumption includes industrial and consumer demand, and is calculated as production plus imports minus exports.

The domestic market is relatively small. Data from the Dutch Central Bureau for Statistics (CBS, 2007) suggest that consumption was 20 thousand tonnes lower than mentioned in Table 1.1. Nevertheless, mango is a popular tropical fruit in the Netherlands, and the domestic market for tropical fruit is clearly growing (AGF, 2008). Mangos are available all year round in supermarkets, and sales volumes are increasing. In 2008, consumption of mango slowed down for the same reasons as mentioned for Germany.

Portugal and **Spain** have substantial domestic consumption. Portugal has a share of 7% in the total EU consumption. With an average consumption of 1.3 kg per person per year, per capita consumption in Portugal is highest in the EU. However, the mango market in Portugal decreased between 2003 and 2007, with -4% in value and -30% in volume. Spain accounts for 3% of the EU consumption. Consumption value increased only 1% between 2003 and 2007, but the volume increased substantially, with 35%.

Belgium, like the Netherlands, is a major importer and distributor of mangos in the EU, with a relatively small consumer market. However, the domestic market is growing quickly, with an increase of 59% in value and 27% in volume between 2003 and 2007, reaching a 2% share in the EU consumption market. Domestic sales of exotic fruit in supermarkets are growing.

Market segmentation

The size and origin of the ethnic population in a country is an important indicator for consumption levels. As they are used to eating mangos, they were the first to demand mangos. Increased travelling of people to exotic destinations added to a growing interest in foreign cuisine and exotic food. The larger supermarkets quickly picked up on this trend and made mangos available to many people. Though high-income countries are adopting exotics more quickly, the low-income countries are rapidly moving towards western consumption patterns and demanding more exotic fruits.

Exotic fruits are generally preferred especially by the younger generation. Because exotic fruits are relatively expensive, affluent people are the most important buyers. While mango is consumed year-round in the main markets, there is a peak in consumption at the end of the year. Traditionally this is the period when demand for exotic fruits is highest (AGF, 2008).

Trends in consumption

There is a wide variety of mangos available, but mangos sold in western Europe are usually of an average size and weigh in between 200 and 800 grams (Consumentenbond, 2005). Tommy Atkins, mostly sourced from Brazil where it is planted in large areas, is a fairly fibrous mango with a red skin. It is still the major variety, although it is facing increased competition, because consumers increasingly prefer less fibrous varieties. Keitt is less fibrous and greener than other varieties, and is growing in popularity. Kent is also less fibrous, has a yellow-orange skin, and is also an upcoming variety. The Haden variety is a bit rounder than the other three, has a green to yellow-orange skin when ripe, and is also consumed in western EU markets. There are market opportunities for other varieties, especially for those that are sweet and juicy.

Colour, size, appearance and price are important factors for consumers. Taste is increasingly important as well, but can only be assessed after the products have been bought. According to Thimm (2004), there are several barriers for consumers. One relates to the difficulty of assessing ripeness. Mangos which are not red or orange, are believed to be unripe, and are therefore being sold less. Market trends show an evolution of sales of nicely coloured mangos with a moderate taste, like the Tommy Atkins, towards less nicely coloured varieties with a good taste, such as Kent (AGF, 2008).

Another obstacle in the consumption of mangos relates to peeling (Thimm, 2004). Many consumers find this problematic and would be more interested in buying pre-peeled and cut ready-to-eat mangos. Several multiple retailers are now offering pre-packaged ready-to-eat mango slices. The market share of ready-to-eat mangos is increasing rapidly (AGF, 2008).

The organic food market is growing in many EU countries. Germany and the UK have a large market and this growth is expected to continue. Organic fresh fruit is performing well. As mangos are not produced locally, there is interest in these products sourced outside the EU, especially when they are fair-trade certified and produced in a sustainable way. However, the growth of the niche markets for organic and fair trade food is expected to slow down, as a result of the current financial crisis. Consumers will become more careful in spending their money, which may have a negative effect on the sales of luxury food products.

Production

Due to climatic constraints that limit the production in the EU, the EU does not produce mangos in large quantities. Only Spain produces and exports small quantities of Osteen mangos, a variety which originally comes from Florida. Because they are not fibrous, have a good taste and are produced close to the EU market, the European Osteen mango is able to compete well with many varieties that are imported from outside the EU (AGF, 2008).

After bananas, mangos are the most important fruit grown in tropical areas around the world (FAO, 2006). It is a very vulnerable fruit and difficult to transport, which has impeded international trade for a long time. The most common varieties on the export market ('Tommy Atkins', 'Kent', 'Haden' and 'Keitt') are firmer, and therefore more suitable for long-distance transportation. These varieties are extensively planted in South America countries. More greenish varieties, such as Ataulfo and Amelie, are gradually being accepted in the international markets. India and Pakistan produce many new varieties (Evans, 2008).

Production data on mangos are only available on an aggregate level including mangosteens and guavas. However, mangos have a large share in this group, and therefore production data on this aggregate level gives a good indication of the production of mango. World production of mangoes, mangosteens and guavas reached 33 million tonnes in 2007 (Table 1.2) (FAOSTAT, 2008 - <http://faostat.fao.org>).

Table 1.2 Production of mango, guava and mangosteen, 2003 – 2007, in thousand tonnes.

	2003	2005	2007
World production	27,449	29,891	33,445
India	10,780	11,605	13,501
China	3,571	3,737	3,752
Pakistan	1,035	1,674	2,250
Mexico	1,362	1,679	2,050
Thailand	1,700	1,800	1,800
Indonesia	1,526	1,413	1,620
Brazil	925	1,002	1,546
Philippines	1,006	1,003	975
...			
Peru	202	239	245
...			
Côte d'Ivoire	25	30	120
...			
Israel	29	43	31

Source: FAOSTAT, 2008

India accounted for 40% of the world production of mangos in 2007, followed by China (11%), Pakistan (7%), Mexico (6%) and Thailand (5%). India and China are major producers, but they also have a large domestic market. India is the main exporter of mangoes in the world, together with Mexico, accounting for 23% and 20% respectively of the world exports in the period of 2003-2005. With less than 2%, China's exports are small. Other major players on the world export market are Brazil (13%), Pakistan (7%) and Peru (6%) (Evans, 2008).

Global production of mango, mangosteens and guavas is increasing quickly. Between 2003 and 2007, it grew with 22%, an average annual change of 5%. Production in Pakistan, Mexico, Brazil and India grew rapidly in this period, while production in the Philippines decreased.

Although Côte d'Ivoire is a small producer on a global scale, its production increased spectacularly. Together with Brazil, Israel, Peru and Pakistan, they are important suppliers of mango to the EU.

Mangos are not harvested year round, but are limited to a season. The harvest times follows a pattern shown in the box below. Mango traders in the EU import from various origins throughout the year to be able to supply mangos to supermarket and other outlets year-round. The supply of mango is most tight at the end of the summer and early autumn (Table 1.3).

Table 1.3 Seasonal calendar for the production of mangos throughout the world

	Jan	Feb	Ma	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mexico				X	x	x	x	x				
Jamaica					x	x	x	x				
India				X	x	x	x	x				
Pakistan					x	x	x	x				
Malaysia					x	x	x	x				
North Vietnam					x	x	x	x	x			
Egypt								x	x	x		
Indonesia										x	x	
Australia	x									x	x	x
Brazil	x	X									x	x
Peru	x	X	x									x
South Africa	x	X	x									x
Tanzania	x	X	x									x
Philippines	x	X	x	x	x							
South Vietnam		X	x	x	x							
Thailand			x	x	x							
Venezuela			x	x	x	x	x					

Source: International Tropical Fruits Network, TFNet, 2008

Opportunities and threats

- + The EU market for mangos is growing quickly, with an average annual change of 7% in value. Between 2003 and 2007, growth rates of apparent consumption were highest in the UK, Germany and Belgium.
- ± Future growth rates may be a bit slower than in the past. In 2008, consumer markets in Germany and to a lesser extent in the Netherlands, stagnated. Between 2003 and 2007, consumption decreased in value and volume in Portugal.
- All EU countries rely on imports because production of mangos in the EU is very limited. Nevertheless, production of Osteen mango in Spain may provide new competition, as the location is very favourable for export to EU countries.
- + Countries with large ethnic communities that are used to eating mangos are the main and most obvious markets (UK and France). Countries with historic relations with mango producing countries are also interesting markets (Spain and Portugal).
- + Taste preferences are slowly evolving from traditionally well-known export varieties, such as Tommy Atkins, to varieties which are less beautiful in colour, but have a better taste: sweet, juicy and less fibrous.
- + The niche market for ready-to-eat mango, which is pre-peeled, cut and pre-packaged, is growing quickly. The UK is currently the most interesting market for convenience products.

Trends and market developments offer opportunities and threats to exporters. A given trend can simultaneously be a threat to some and an opportunity to others. Therefore, they should always be analysed in relation to specific company circumstances. For further information can be found in Chapter 7 of the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Useful sources

There are many websites providing new, services and market information on fresh fruit and vegetables. Some important websites are:

- FreshInfo (international) – <http://www.freshinfo.com>;

- Freshplaza (international) – <http://www.freshplaza.com>;
- Eurofruit (international) – <http://www.fruitnet.com>;
- CIRAD (France) – <http://passionfruit.cirad.fr>;
- Fruchthandel (Germany) – <http://www.fruchthandel.de>;
- Horticom (Spain) – <http://www.horticom.com> (partly in English, mostly in Spanish).

2 Trade channels for market entry

Trade channels

All the selected countries have a well developed distribution system for fresh fruit and vegetables. Most of Europe is served by importers based around the ports of Rotterdam (the Netherlands), Antwerp (Belgium), Le Havre (France), and Hamburg (Germany), in addition to importers in the UK. The sea ports of countries in the Mediterranean Sea are primarily used for produce of EU or Mediterranean origin, but the share of imports from outside the EU are increasing. Sea transport dominates the world trade in mangos, although airfreight is increasingly used, especially for high-quality, premium-priced mangos (MINECO, 2007).

Mangos are the third most traded tropical fruit worldwide, after bananas and pineapples. The consolidation of buying power which has occurred in banana and pineapple trade, is not so strong for mangos, even though most mangos are sold through large supermarkets. The chain for mangos can be short, consisting of only a producer/exporter, who sells to an importer, which distributes to supermarkets. But the mango chain can also be much larger, consisting of six or seven links: producer, distributor, exporter, importer, distributor, supermarket (Consumentenbond, 2005). Importers usually arrange logistics and transport, quality control and coordination of the value chain (MINECO, 2007).

Mangos are imported into the EU by independent importers or through buying groups for supermarket chains. Some of these importers are specialised in exotics such as mangos. Others import a large variety of fruits, and include mangos as a peripheral activity. Specialised importers are the best business partners for exporters from DCs. Exporters are best advised to look for an importer which supplies supermarkets, wholesalers, greengrocers or the catering industry, and who deals in smaller quantities and is interested in new suppliers.

The most important importers of exotic fruits in the EU are:

- Bud Holland (the Netherlands) – <http://www.bud.nl>;
- FTK (the Netherlands) – <http://www.ftk.nl>;
- ExoFarm (France) – <http://www.exofarm.com>;
- Cobana Fruchtring (Germany) – <http://www.cobana-fruchtring.com>;
- Minor Weir and Willis Ltd (UK) – <http://www.mwww.co.uk>;
- Utopia UK Ltd – <http://www.utopiauk.com>.

For other major importers and distributors of fresh fruits and vegetables, see Chapter 3 in the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Trends in trade

Import volumes of mango have become so large, that traders are beginning to perceive them as bulk products, no longer as exotic specials (Consumentenbond, 2005). This can cause further price decreases. Because of the problems of seasonality, marketing strategies from trade operators are increasingly focussed on improving the regularity in supply (FAO, 2006).

Retail trade

In the Netherlands, supermarkets are the most important trade channel for mangos (53% of the sales in 2002), followed by open-air markets (29%) and special greengrocers (13%) (Consumentenbond, 2005). These figures have not been found for the other countries. It is likely that over the last six years, the supermarkets have gained a larger share in sales of mangos, at the expense of markets and greengrocers.

These figures might be indicative for the sales channels in France, Germany and the UK. In Italy, Spain and Portugal, open-air markets still have a larger share in the sales of fresh fruit than in the Northern European countries.

Although there are opportunities to supply directly to supermarkets, this is a less obvious choice as supermarkets often work with preferred suppliers. Moreover they often deal in large quantities which cannot be supplied by smaller exporters.

Price structure

Trade margins vary strongly depending on the variety and quality of product, the distribution channel, the continual changes in supply and demand and resulting price fluctuations. It is estimated that European importers take a 5-10% trade margin to cover their business costs and risks but this may vary between countries as business cost and risks are not always equal. Wholesalers and retailers also need to take a margin, which varies even more than import margins. Importers and agents can also give up-to-date information on the price levels of individual products. Exporters are recommended to monitor markets and prices closely, in order to quote realistic prices. More information on margins can be found in Chapter 5 of the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Selecting a suitable trading partner

General information on selecting suitable trading partners is available in the CBI market survey "The fresh fruit and vegetables market in the EU" and the CBI publication 'Export planner'. Both documents are available at <http://www.cbi.eu/marketinfo>.

The choice of countries is as important as the choice of importers. It is best to determine first which country is most interesting to export to. The countries with the largest market for mango may import mango directly from origin or may import from other countries which are specialised in the trade of mango (for instance the Netherlands) or from neighbouring countries. The best way of finding a suitable business partner is to look at the supply chain in the country of interest and determine whether mangos are imported directly from source or through other EU countries.

There are many importers of mangos in the selected countries. Contact information on these importers can be found in the CBI country surveys of the fruit and vegetables markets. These documents are available at <http://www.cbi.eu/marketinfo>. The following websites are also useful sources for finding contact details and information on importers:

- Europages – <http://www.europages.com>. The most interesting contacts can be found under the category 'Agriculture & Livestock', subcategory 'Fruits and Vegetables'.
- Greentrade – <http://www.greentrade.net>, marketplace and directory for organic products;
- Holland Fresh Guide – <http://www.hollandfreshguide.com>, go to 'Advanced search';
- Fresh Produce (UK) – <http://www.freshproduce.org.uk>, go to 'Search members' ;
- Rungis (France) – <http://www.rungisinternational.com>.
- DFHV, German Association of Fruit and Vegetables Traders – <http://www.dfhv.de>, click on 'Mitglieder';

3 Trade: imports and exports

Imports

There are no exact trade data available for mangos. The HS nomenclature does not have a specific code for mangos, however there is one that covers mangos, guavas and mangosteens. As international trade in the last two products is very small, the trade statistics are a good general indication of the trade in mangos.

Mangos, together with pineapples, are one of the fastest growing fruits in imports. In 2007, the 27 EU member states together imported 333 thousand tonnes of mangos with a value of €421 million (Table 3.1). This is an overestimation of net imports, because all intra-EU trade consist of mangos that were imported from outside the EU and not from own production.

There is extensive internal EU-trade in mangos: 35% of the import value in 2007 came from re-exports (Table 3.1). When intra-EU imports are excluded, net imports amounted to 209 thousand tonnes of mango, worth €273 million. DCs are major suppliers, accounting for 84% of the total EU imports. Other countries outside the EU supplied 16%.

Between 2003 and 2007, imports increased 47% in value and 32% in volume. Intra-EU trade, based on re-exports, grew most quickly, with 105% in value and 66% in volume (see section on 'Exports'). Imports from other countries outside the EU increased more quickly than the market: +95% in value and +43% in volume. Israel in particular has become an important supplier: its share in imports increased from 4% of the import value in 2003, to 8% in 2007. The USA became a less important supplier.

Direct EU imports from DCs increased 20% in value and 15% in volume between 2003 and 2007. While direct imports decreased 7% in value between 2003 and 2005, they picked up again between 2005 and 2007, with an increase of 29% in value. The share of DCs in EU imports decreased: in 2003, DCs accounted for 67% of the import value. Brazil's share in particular decreased sharply: from 33% in 2003 to 20% in 2007. South Africa also lost share in import value from 5% in 2003 to 2% in 2007. Peru became a more important supplier of mangos (from 6% in 2003 to 8% in 2007), just as Pakistan, India and Thailand. Also, imports from West African countries, such as Côte d'Ivoire, Senegal, Burkina Faso and Mali, increased.

Table 3.1 Imports of mango, mangosteens, guavas and leading suppliers to EU countries, 2003-2007, share in % of import value.

Product	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 Share in %	Share (%)
Total EU-27	286	327	421		
Intra EU ²	72	113	149	The Netherlands (18%), France (8%), Spain (4%), Belgium (2.8%), Germany (1.5%)	35%
Extra EU ex. DCs	23	37	44	Israel (8%), USA (1.7%), Australia (0.1%), Switzerland (0.1%)	10%
DCs	191	178	229	Brazil (20%), Peru (8%), Côte d'Ivoire (7%), Pakistan (4.6%), Senegal (1.7%), Burkina Faso (1.6%), Mali (1.6%), South Africa (1.6%), India (1.1%), Thailand (1.0%)	54%
The Netherlands	100	90	112		
Intra EU	5	8	12	France (7%), Spain (1.5%), Germany (1%), Belgium (0.8%), Portugal (0.3%)	11%
Extra EU ex. DCs	6	8	8	USA (4.7%), Israel (2.2%), Switzerland (0.5%), Australia (0.1%), Norway (0.1%)	7.6%
DCs	89	73	92	Brazil (46%), Peru (18%), Côte d'Ivoire (2.5%), Mali (2.1%), Mexico (1.9%), Costa Rica (1.7%), Ghana (1.7%), Guatemala (1.3%), Ecuador (1.3%), Burkina Faso (1.2%)	82%
United Kingdom	36	51	76		
Intra EU	7	18	26	France (21%), The Netherlands (10%), Spain (1.5%), Belgium (0.7%), Italy (0.6%)	34%
Extra EU ex. DCs	8	3	4	Israel (5%), Guam (0.2%), Australia (0.1%), USA (0.1%)	5.9%
DCs	21	30	46	Pakistan (19%), Brazil (11%), Peru (7%), South Africa (6%), India (5%), Burkina Faso (2.4%), Costa Rica (2.1%), Gambia (1.7%), Senegal (1.4%), Dominican Republic (1.0%)	60%
France	52	68	74		
Intra EU	9	13	25	The Netherlands (16%), Belgium (11%), Spain (5%), Germany (1%), Luxembourg (0.4%)	34%
Extra EU ex. DCs	7	22	26	Israel (35%), Australia (0.1%)	35%
DCs	35	34	23	Côte d'Ivoire (10%), Peru (5%), Mali (4.1%), Brazil (3.8%), Burkina Faso (1.7%), Mexico	31%

² Note that all intra-EU trade comes from re-exports, as mango is not produced in the EU.

Product	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 Share in %	Share (%)
				(1.3%), Senegal (0.8%), Pakistan (0.8%), South Africa (0.6%), Thailand (0.5%)	
Germany	35	44	53		
Intra EU	28	38	46	The Netherlands (68%), France (9%), Spain (5%), Austria (1.4%), Belgium (1.3%)	86%
Extra EU ex. DCs	0	0	0	Australia (0.2%)	0.2%
DCs	7	6	8	Brazil (3.1%), Thailand (3.0%), Pakistan (2.5%), Burkina Faso (1.1%), Peru (0.8%), Dominican R. (0.6%), Mexico (0.5%), Ecuador (0.4%), Sri Lanka (0.3%), India (0.3%)	14%
Belgium	12	13	39		
Intra EU	3	4	6	The Netherlands (9%), France (3.8%), Spain (1.9%), Germany (0.5%)	15%
Extra EU ex. DCs	1	2	3	Israel (4.3%), USA (2.6%), Australia (0.2%)	7.1%
DCs	9	7	30	Côte d'Ivoire (45%), Senegal (13%), Burkina Faso (4.6%), Mali (3.3%), Pakistan (3.3%), Peru (2.6%), Brazil (1.4%), Guinea (1%), Ghana (0.9%), Ecuador (0.9%)	78%
Spain	14	14	17		
Intra EU	3	3	3	France (7%), The Netherlands (6%), Portugal (1.8%), Germany (0.7%), United Kingdom (0.5%)	17%
Extra EU ex. DCs	1	0	1	USA (2.9%), Israel (2.0%), Australia (0.4%)	5.4%
DCs	11	10	13	Brazil (44%), Peru (16%), Venezuela (8%), Dominican Republic (3.3%), Ecuador (2.3%), South Africa (1.6%), Costa Rica (1.5%), Mexico (0.6%), Burkina Faso (0.4%), Senegal (0.2%)	78%

Source: Eurostat, 2007, 2008

The Netherlands is the leading importer with a share of 27% of the total EU import value in 2007 (Table 3.1). While their share in EU imports is decreasing, the Netherlands still has a very strong position as an importer of exotic fruits, such as pineapples and other minor exotic fruits. It is an important re-exporter of mangos: more than 70% of the imports of mango is re-exported. Between 2003 and 2007, imports of mango increased 12% in value and 18% in volume. Both re-exports and domestic demand for mangos are increasing.

DCs are the most important suppliers, accounting for 82% of the import value in 2007 (Table 3.1). Between 2003 and 2007, imports from DCs increased 3% in value and 12% in volume. Brazil is the main supplier (46% of the import value), but its' market share decreased sharply compared to 2003 when it was 62%. South Africa's share decreased from 9% in 2003, to around 1% in 2007. Peru became an important supplier (Table 3.1). Non-DC countries outside the EU accounted for 8% of the imports. Imports from these countries increased 47% in value and 110% in volume compared to 2003. Israel and the USA became more important suppliers. Intra-EU trade also increased quickly. France and Spain became more important suppliers.

In 2003 and 2005, the **UK** was the third largest importer of mangos in the EU, after the Netherlands and France. Because imports increased quickly (+113% in value and +76% in volume between 2003 and 2007), it is now the second largest EU importer. In contrast to the Netherlands, it has a large domestic market and most imported mangos are consumed domestically. Only 4% was re-exported, mainly to Ireland and the Netherlands. The UK imported more than half of its mangos directly from DCs (Table 3.1). Intra-EU imports showed strongest growth, with 257% in value and 110% in volume. The share of imports from France increased from 6% of the import value in 2003 to 21% in 2007. Imports from DCs also increased quickly: +121% in value and +120% in volume. Imports from Brazil decreased, while more mangos were imported from South Africa, Peru and India. Imports from other countries outside the EU decreased 42% in value. The USA no longer is an important supplier.

France is the third importer of mangos in the EU, accounting for 18% of the EU import value in 2007. Between 2003 and 2007, imports increased 44% in value and 20% in volume. Only one third of the imports came from DCs, far below the EU average of 54%. French imports from DCs decreased between 2003 and 2007: -36% in value and -53% in volume. Côte d'Ivoire and Peru were major suppliers in 2003, but they quickly lost share in imports. Israel has become the leading supplier, accounting for 35% of the import value in 2007 (14% in 2003). France also increasingly imports mangos indirectly, from other EU countries, such as the Netherlands and Belgium. Their share in import value increased from 13% in 2003 to 27% in 2007.

Germany has the smallest imports from DCs of the six countries discussed here. Almost all mangos are imported indirectly. EU countries accounted for 86% of the import value in 2007, DCs for 14%. Between 2003 and 2007, imports of mango increased 53% in value and 35% in volume. Imports from other EU countries showed above average growth (+66% in value and +45% in volume), while imports from DCs increased only 3% in value and decreased 23% in volume. Brazil, Pakistan and France became less important as suppliers, while more mangos were imported from the Netherlands and Spain.

In 2007, **Belgium** accounted for 9% of the EU import value of mangos. Of the six countries, Belgian imports showed strongest growth. Between 2003 and 2007, imports increased 226% in value and 120% in volume. Like the Netherlands, Belgium is an important importer and distributor of mangos in the EU. DCs accounted for three quarters of the import value in 2007, and with an increase of 252% in value from 2003, their share is increasing. Contrary to the trend found in the other countries, the market share of other EU countries in Belgian imports decreased from 25% of the import value in 2003 to 15% in 2007. Shares decreased for all EU countries, but most quickly for France. Imports from DCs shifted from South Africa and South America to West African countries. South Africa was the main DC supplier in 2003 (17% of the import value). Ecuador, Brazil and Peru together accounted for 20% of the imports in 2003. In 2007, West African countries are the most important suppliers of mangos to Belgium, together accounting for two thirds of the import value. Côte d'Ivoire became the most important supplier, and imports from Senegal, Burkina Faso and Mali also increased. These mangos are mostly transported by air. There are good flight connections to Brussels.

Spain is now the sixth importer of mangos in the EU, accounting for 4% of the EU import value. Between 2003 and 2007, imports increased 22% in value and 39% in volume. Spain also imports more than three quarters of the mangos directly from DCs. Imports from DCs increased 23% in value and 44% in volume, while other EU countries lost share in imports. South American countries account for three quarters of the supply. Contrary to the common trend, Brazil's share in imports increased from 34% of the import value in 2003 to 44% in 2007. It supplies competitive priced mangos. Imports from Ecuador decreased.

Exports

In 2007, EU countries re-exported 131 thousand tonnes of mangos, with a value of €173 million. Intra-EU trade in mangos is increasing. Between 2003 and 2007, exports increased 80% in value and 40% in volume. Almost 90% of these exports went to other EU countries. Germany, France and the UK were the main destinations. Non-EU destinations for these exports include Russia, Norway and Switzerland. The main exporting countries were the Netherlands (47% of the EU export value in 2007), France (20%) and Belgium (19%), followed by Spain (5%), Germany (4%) and the UK (2%) (Table 3.2). These countries accounted for 97% of the (re-)exports of mango in the EU. Exports increased in value and volume for each country. Exports of Belgium and France grew particularly fast.

Table 3.2 Exports of mango, mangosteens, guavas in the EU, 2003-2007, value in million euros and volume in thousand tonnes.

	2003		2005		2007	
	Value	Volume	Value	Volume	Value	Volume
Total EU-27	96	93	125	109	173	131
The Netherlands	60	64	69	71	81	78
France	15	11	24	13	35	17
Belgium	8	7	11	9	33	19
Spain	6	5	7	5	9	7
Germany	5	5	7	7	7	6
UK	1	1	3	1	3	2

Source: Eurostat, 2007, 2008

Opportunities and threats

- + DCs account for more than 80% of direct imports of mangos by the EU. Although the share of DCs in imports of mango differs between countries, direct imports of mangos are increasing in all the selected countries, except for France and Germany.
- ± Compared to 2003, DCs lost market share to other countries outside the EU, as Israel became a more important supplier of mangos. Direct EU imports from DCs decreased 7% in value between 2003 and 2005, but increased again between 2005 and 2007 (+29%).
- + Direct imports from DCs by Belgium and the UK grew much more quickly than the market. Belgium is quickly developing as an importer and distributor of mangos in the EU.
- ± The Netherlands will remain of particular interest as leading distributor of imported mangos to other EU countries. With diverse origins of supply, they can supply mangos year round. The Netherlands has the highest share in direct imports from DCs, but growth in imports from DCs is slowing down.
- In France, direct imports of mangos from DCs decreased between 2003 and 2007.

Trends and market developments can offer both opportunities and threats to exporters. A given trend can simultaneously be a threat to some and an opportunity to others. These trends should therefore always be carefully analysed in relation to specific company circumstances, in combination with the information provided in other chapters. Further information is available in Chapter 7 of the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Useful sources

- EU Expanding Exports Helpdesk – <http://exporthelp.europa.eu>;
- Eurostat, official statistical office of the EU – <http://epp.eurostat.ec.europa.eu>.

4 Price developments

During the early 1990s, mango imports were small. They were a luxury product for which a high price was paid. Since then, imports of mangos have increased rapidly and generally, prices have gone down. Prices for the majority of mango varieties have decreased around 5% the last decade, mainly because they have become more widely available (Evans, 2008).

Mango prices vary widely depending on variety, size, quality standards and origin. Average import prices include both premium-priced and regular fruits, as well as air-freighted and sea-freighted mangos. Air-freighted mangos are usually premium quality or from countries where sea freight is not possible. Therefore, import prices do not accurately reflect true prices received by exporters, and can only be used as indication. The average import price of mangos from DCs to the EU increased 4%, from €1.18 per kg in 2003 to €1.23 per kg in 2007. This might indicate an increase in imports of premium-priced mangos. The price of Brazilian mangos was the same as in 2003 (an average €1000 per ton). Prices for mangos from Peru, Côte d'Ivoire and other West African countries decreased significantly, while prices for mangos from Pakistan, India and South Africa increased.

While import prices give an indication of the trends in prices, table 4.1 gives an overview of real trade prices from September 2008. They give an indication of the great differences in prices paid for mangos, according to among others variety, origin and destination.

Supply and demand on the world market are the main factors that influence the export prices of fresh fruit. Seasonality of mango supply has strong influence in the EU market. Large quantities are imported in the second and fourth quarter (April to June, and October to December) (FAO, 2006). Prices patterns for mango fluctuate over time, and show pronounced seasonality, due to non-regular supply and peaks in demand during specific periods, like Christmas. Prices of mangos decrease considerably when peak volumes are produced, and recovery of prices is slow.

While import prices give an indication of the trends in prices, table 4.1 gives an overview of real trade prices from April 2009.

Table 4.1 Examples of import prices paid for different varieties of mango in the Netherlands, Belgium, the UK and France, in euros per kg, September 2008

Market	Origin	Low price	High price	Variety
The Netherlands	Brazil	1.25	1.75	Tommy Atkins
	Brazil (air)	3.50	3.50	Palmer
	Israel	1.25	1.63	Kent
	Israel	1.50	1.88	Keitt
	Israel (air)	3.50	3.50	Kent
	Puerto Rico	1.60	1.60	Keitt
	Spain	2.50	2.50	Osteen
Belgium	Brazil	1.21	1.21	Tommy Atkins
	Brazil	1.50	1.50	Kent
	Israel	1.50	1.50	Keitt
United Kingdom	Brazil	1.89	1.89	Tommy Atkins
	Brazil	1.98	1.98	Keitt
France	Brazil (air)	5.00	5.00	Kent
	Israel	1.50	1.50	Kent
	Spain	2.30	2.30	Osteen

Source: Marketing News Services, September 2008.

The CBI market survey 'The fresh fruit and vegetables market in the EU' and the surveys covering individual countries, provide more information on price levels for fresh fruit in the EU. These surveys can be downloaded from <http://www.cbi.eu/marketinfo>. Other sources include:

- ITC's Market News Service (MNS) – <http://www.intracen.org/mns>;
- Today's Market Prices – <http://www.todaymarket.com> (subscription fee);
- Agribusiness Online (various European ports) – <http://www.agribusinessonline.com>;
- FreshPlaza PriceWatch (for Dutch market) – <http://www.freshplaza.com>;
- USDA Market News, wholesale market reports for various EU countries – <http://www.ams.usda.gov/fv/mnacs/intfru.htm>).

5 Market access requirements

Producers in DCs preparing to access the EU, you should be aware of the market access requirements of potential trading partners, the EU and national governments of EU countries. Quality requirements are very diverse, though, in general, are high in most EU markets. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select fresh fruit and vegetables and country of interest in the category search, click on the search button and click on market access requirements.

There are no EU import tariffs or entry prices for mango. More information on tariffs and quotas can be found at <http://exporthelp.europa.eu>.

Packaging

Mangos are graded according to size, weight, colour and maturity. The time for the mangos to ripen should be equal for all mangos packed together. For example, larger mangos take more days to ripen than smaller ones. They should therefore not be mixed in one box. Boxes used for transport of mangos can be either wooden or carton. There should be only one level of mangos in one box (MINECO, 2007). Vibrations and shocks during transport can cause bruises and decay of the fruits, resulting in lower prices. Too much ventilation can also affect the quality of the mangos, causing shrinkage, and loss in weight and colour (TFNet, 2008).

Paper scraps can be used to prevent the mangos from bruising. The materials used inside the package must be new, clean and of a quality which avoids causing external or internal damage to the produce. Wrapping fruits individually (Unipack) and packing them in honey comb structure, assures optimum ripening and reduces the chance of spoilage. Polythene (LDPE) lining maintains humidity in the boxes, which prevents the fruits from shrinking. The use of CFB boxes of 5 kg or 10 kg capacity, have proven to be successful to maintain quality in the export of mangos (TFNet, 2008).

More information on post-harvest treatment, packaging, storage and transportation, as well as information on export market requirements, regulations, food safety standards (phytosanitary controls) and Maximum Residue Levels (MRLs), can be found at the International Tropical Fruit Network (TFNet) – <http://www.itfnet.org>, go to 'Tropical Fruit Information'.

Additional information on packaging can be found at the website of the International Trade Centre (ITC) on export packaging – <http://www.intracen.org/ep/packit.htm>.

Labelling

Mangos in consumer packages should have a label with the produce and their variety, in addition to further requirements, mentioned in the Codex General Standard for the Labelling of Pre-packaged Foods (CODEX STAN 1-1985, Rev. 2-1999 – <http://www.codexalimentarius.net>, 'Official Standards', 'Official Codex Standards', 'List').

Mangos shipped in non-retail containers, should have all information on the same side, clearly marked and visible from the outside, or in the documents accompanying the shipment. Mangos packed in bulk should be accompanied by: name of the exporter, packer and/or dispatcher; name of produce and variety; country of origin of produce; commercial identification (class and size, and optionally number of fruits and net weight); and optionally an 'Official Inspection Mark'. Exporters are strongly recommended to inform themselves on issues of grading, quality and packaging of mangos through the Codex Standard for Mangoes: CODEX STAN 184-1993, at <http://www.codexalimentarius.net>.

6 Doing business

Information on doing business can be found in the CBI export manuals 'Export Planner', 'Your image builder' and 'Exporting to the EU'. Subjects covered include approaching potential business partners, building up a relationship, drawing up an offer, handling the contract, methods of payment and terms of delivery. More information on doing business can also be found in the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Cultural awareness, in addition, is a critical skill in securing a successful business relationship with an importer in the EU. The business environment differs per EU country. Information on cultural differences in the EU can be found in Chapter 3 of the CBI export manual 'Exporting to the EU'. Each of these documents can be downloaded from <http://www.cbi.eu/marketinfo> – go to 'Search publications'.

In general, many EU importers of fresh produce seek a long term relationship with their suppliers. They have high demands on the quality of the produce and the reliability of the supply. Trust, quality focus and reliability are therefore important ingredients for a sustainable business relation.

Sales promotion

Visiting or participating in a trade fair can be an important promotional tool and way of approaching potential trading partners. The most relevant trade fairs for exporters of fresh fruit and vegetables to the EU are:

- Fruit Logistica – <http://www.fruitlogistica.com>. The main European trade fair for fruit and vegetables, with much attention to products from DCs. Held every February in Berlin.
 - Fresh 2009 – <http://www.freshcongress.com>. Yearly European trade fair for the fresh produce sector. The next show will be held in Valencia, from 13-14 May.
 - Innofresh – <http://www.innofresh.nl>, in Rotterdam, 21 to 23rd of September 2009;
- These exhibitions provide excellent opportunities to explore the EU market and to come in contact with potential buyers.

Trade journals, professional websites and newsletters are important sources of up-to-date information on developments in the fresh produce sector. The most relevant sources of information on the market for mango in the EU and in selected markets are:

- FreshFel Europe, forum for the Fresh Produce Industry – <http://www.freshfel.org>;
- Eurofruit Magazine – <http://www.eurofruitmagazine.com>;
- International Tropical Fruit Network – <http://www.itfnet.org>, contains product specific information on post-harvest handling and packaging and export market requirements (Under 'Market and International Trade') for various tropical fruits, including mango.

This survey was compiled for CBI by Mercadero in collaboration with Mr. Piet Schotel.

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>.

Appendix A General product description

The mango tree is native to southern Asia but has been spread over the whole tropical region. There are a great many varieties of mangos, differing in size, colour, fibre content, sugar content etc. Mangos can not be kept long and damage easily. Varieties that are less prone to damage, low in fibre content and with a sweet taste are the most suitable for export.

HS code

08045000	Guavas, mangosteens and mangos
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