Mango
European market trend

Fine growth

by **Pierre Gerbaud**, consultant
pierregerbaud@hotmail.com

The European mango market is maintaining its positive trend. In spite of campaigns often being more concentrated for several origins, Europe's total import volumes rose again. Without reaching the leap recorded between 2017 and 2018 (plus 49 000 tonnes), the gain between 2018 and 2019 was close to 15 000 tonnes. This rise came through the established main supplier countries to the EU, but also through the development of lower-profile origins, whose contribution to trade swelled the overall quantities entering the market.

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A NATURAL WEALTH OF TASTE

BY CAPEXO

The taste of trust

MANGO

As well as providing its tender, juicy, sweet or sour flavour, the mango is bringing the world together. It has strengthened our ties with our trusted growers, as we continue to work actively alongside them despite the international health crisis that has hit us all. Together, we have managed to maintain our level of requirements, to deliver you the quantities and quality you expect, while maintaining our relationships, know-how and mutual commitments. Together, we have been able to continue working with the passion that drives us all, to bring you the most delicate tastes, now more than ever.

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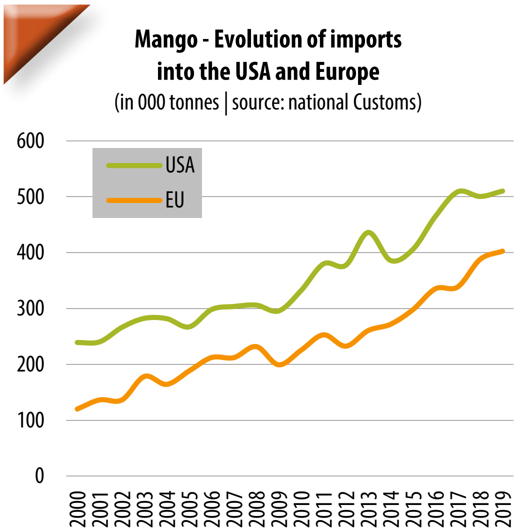
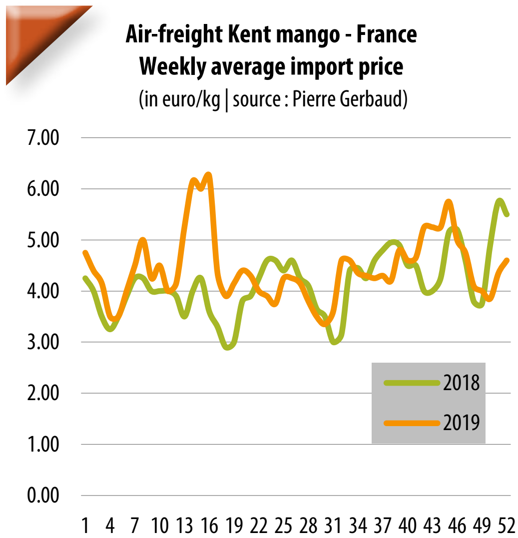
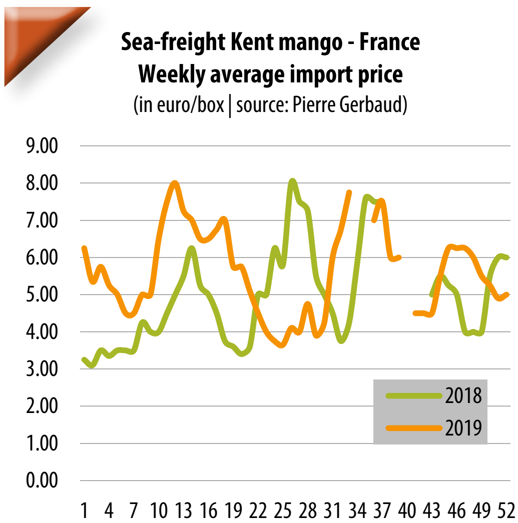






A sector still on the rise

2019 was the year that broke the 400 000-tonnes mark for mangos imported by the EU from third countries. This figure was even more convincingly broken if we include this year's Spanish volumes of around 20 000 to 22 000 tonnes. The world's biggest consumption centres for imported mangos remain North America (500 000 tonnes), Asia (450 000 tonnes) and the EU (400 000 tonnes). The gap between North America and the EU is tending to narrow, due to a stagnation in North American imports, while European imports are continuing to grow.

The mango is expanding its reach, no longer just a must-have in the exotics section, but a more regularly consumed fruit. It is definitely taking market share from imported temperate fruits during the European counter-season. The mango is now present year-round in substantial quantities, whether in the counter-season or during the summer, when it is in more direct competition with fruit produced in Europe, indicating a degree of commoditisation. The driving force for this development should be sought in particular in large and regular supplies being provided by some supplier countries, which represent the mainstays of the sector. With the extension of the Brazilian and Peruvian campaigns and the development of their volumes, the needs of European demand are practically covered. If we add to these two origins West Africa and the Mediterranean, the loop is closed. The various other origins provide additional contributions in lower supply periods from the top four or five countries for this product.

In the downstream segment, efforts by importers and distributors to secure a high-quality supply are another factor behind progress in consumption. They are aided in this by the potential of the main exporter countries and by the implementation of organisations promoting a supply of products more in line with consumer demand. Regularity of flows, qualitative homogeneity of the products and fine-tuning of the triggering operations have generated and sustained the boom in consumption.

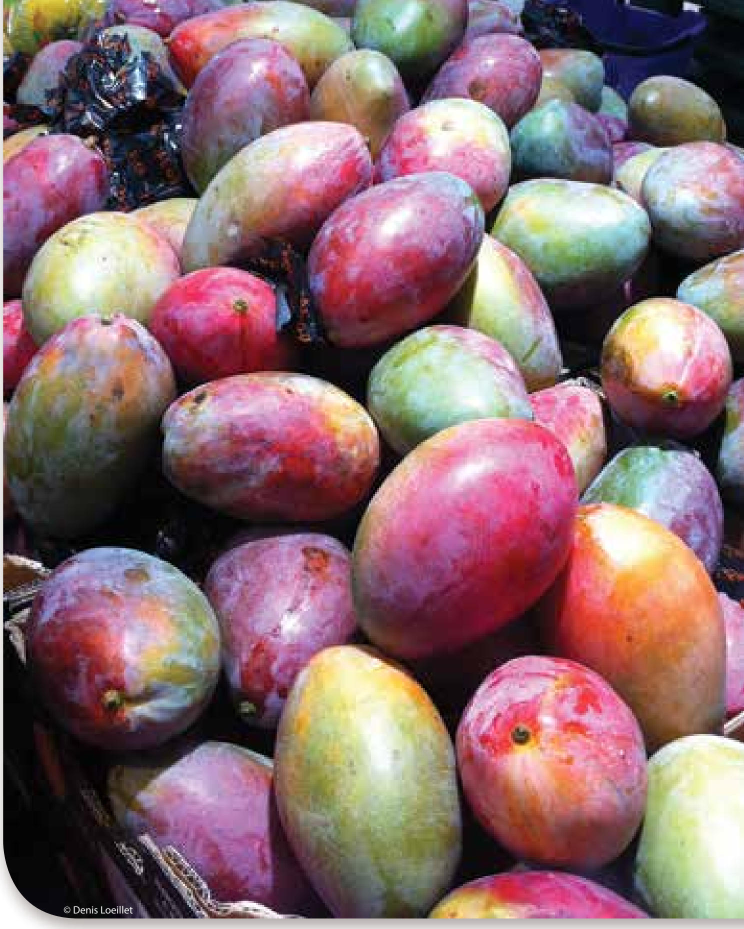
Qualitative inequality

Yet the mango's rise on the European market is not without difficulty. The Latin American and Mediterranean origins seem to have the upper hand in this competitive race. The structure of their large-sized and generally well-organised orchards, as well as the crop management systems, undeniably aid better control of fruit quality. Furthermore, these origins have a certain advantage in terms of competitiveness via the logistical synergy arising from the volumes shipped, of mangos as well as a wide range of fresh products. The origins where the cultivation area remains fragmented and disorganised must face greater constraints, which are detrimental to the qualitative homogeneity of fruit earmarked for export. These contrasting situations are of course reflected on the market in terms of sale price and brand image. And this is the key to success for the exporter countries: achieving regularity and qualitative homogeneity of the fruit shipped. At this stage, fruit quality cannot be reduced simply to outward appearance, but also its keeping properties, to be able to reach consumers under optimum taste conditions. It is based on this quality control that an industry seems to be able to develop effectively. The West African origins suffer more from a lack of qualitative regularity in their shipments, as many European operators point out. This aspect comes on top of the concentration of the campaign calendar of these origins, often leading to market over-supplies which are always detrimental to the chances of maintaining profitable rates.

West African mango – Interceptions upon entry to EU

Origins	2019		2018	
	Presence of pests	Other reasons	Presence of pests	Other reasons
Burkina Faso	12	2	8	2
Brazil	4	11	4	4
Côte d'Ivoire	17	6	23	3
Guinea	1	3	3	0
Mali	16	14	13	7
Mexico	1	4	0	5
Peru	12	23	9	7
Senegal	9	5	10	9

Source: European plant protection services



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Parasite pressure still a cause for concern

On top of the above-mentioned inequalities, we should also mention the ability of the supplier countries to adapt to the EU's increasingly tough new sanitary and phytosanitary regulations. The 2020 campaign will show how operators implement these provisions. Will the pest management measures in the exporter countries be able to guarantee that current flows will be maintained? Interceptions due to the presence of pests (mainly the fruit fly) in 2019 remained high. The main West African countries had a total of 55 interceptions, as opposed to 57 in 2018. So management of the problem remains highly partial, although certain origins are managing to stem this parasite pressure. All things otherwise being equal, we should compare volumes shipped for each origin to better contextualise the scale of seizures for each of the industries concerned.

Yet in parallel with these interceptions, we can also be astounded at the substantial number of interceptions for other reasons. Phytosanitary certificates or documents accompanying exported merchandise are frequently missing, which slows down product deliveries. These administrative obstacles appear inconceivable, in the case of professionals well used to export procedures. They could easily be removed with a minimum of effort by operators.

Flow management, qualitative regularity and adapting to new regulations represent the triple target for the mango market to aim for, in order to maintain the rise it has recorded over the past decade ■