

Mango

2019 review by origin

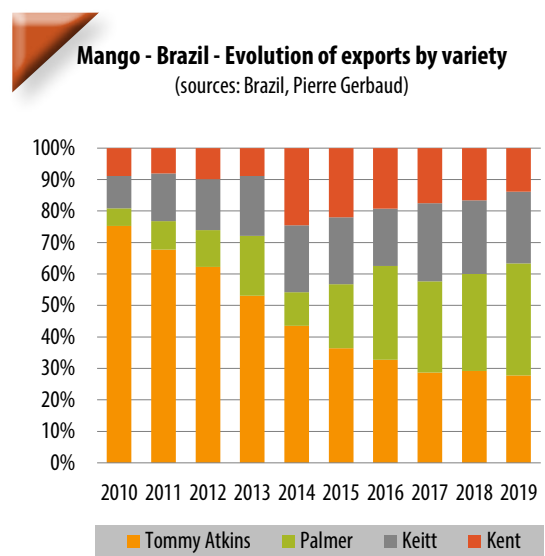
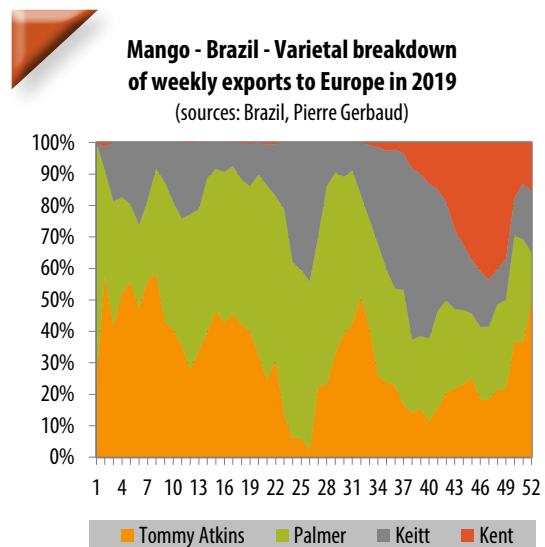
by **Pierre Gerbaud**, consultant
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Brazil

Still on top

Brazil remains the number one supplier to the European mango market, thanks to its ability to produce and export fruit year-round. Furthermore, its exports have seen constant and high-tempo growth over the past two years: an 18 000 tonnes increase in 2018 from 2017, and a 20 000 tonnes increase in 2019 from 2018, i.e. nearly 155 500 tonnes. On its own, Brazil accounts for 38 % of the European Union's supply.

Brazilian shipments do not follow a regular tempo year-round, in view of the country's diverse production zones, the varieties developed and finally a commercial strategy tailored to demand from the main consumption centres, i.e. Europe and North America. For the North American market, Brazil exports mainly between August and December, with Tommy Atkins largely predominant. Along with Peru it offsets Mexico's supply trough period; this country's campaign extends from February to October. On the US market, Mexico plays a similar role to Brazil in Europe.





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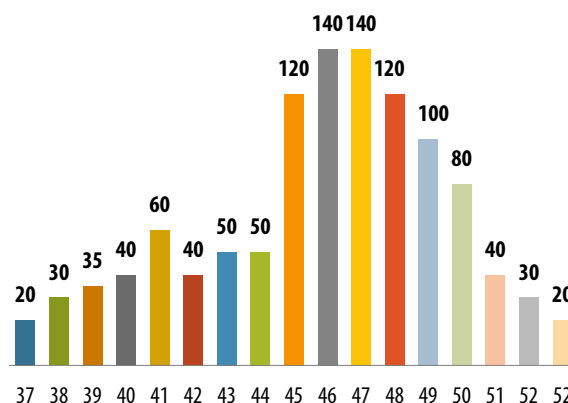


Brazil's export calendar to Europe has its heaviest periods in spring (March to June), and at the end of the year from October to December. It is the latter period which is densest in terms of volumes, accounting for around 68 % of the annual total shipments. While Brazilian exports to North America are practically mono-variety, they are much more diverse to Europe and evolving, with Tommy Atkins gradually on the wane, due to its lower popularity on the European markets. While a decade ago this variety represented between 60 and 75 % of exports, depending on the year, it now accounts for just 28 to 30 %. It is present year-round, though with a considerable drop-off in June and July. It is the Palmer variety which has made the biggest progress, gradually offsetting the decline of Tommy Atkins. From a mark of 5 to 10 % a decade ago, in recent campaigns it has represented 30 to 35 % of exports. It is available year-round, with a more marked period in the first half. Keitt has also seen a big increase, with its volumes doubling over the past decade. Finally, Kent has the lowest representation, with 15 to 20 % of volumes depending on the year. Although smaller in terms of volume, Kent accounts for 40 % of Brazil's end-of-year shipments. It is the only variety in the Brazilian quartet linked to a specific trading period. Those containers shipped at other times of year represent only insignificant quantities compared to other mangos.

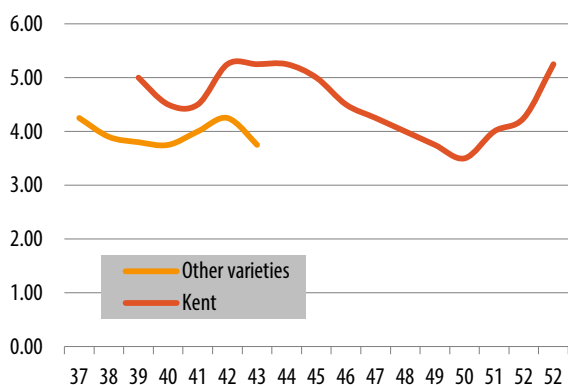


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Brazilian air-freight mango - Weekly incoming shipments on the French market in 2019 (in tonnes | source: Pierre Gerbaud)



Brazilian air-freight mango - Weekly average import price on the French market in 2019 (in euros/kg | source: Pierre Gerbaud)



A late and measured air-freight campaign

Brazil's 2019 air-freight campaign started one or two weeks later than in 2018. The first batches, received in mid-September in moderate quantities, comprised Keitt and sold steadily at between 4.00 and 4.50 euros/kg until late October. They rapidly gave way to Kent from early October. Their prices remained stable and fairly high, at times in excess of 5.00 euros/kg, and then dipped given the increasing supply, but also because of Spanish Kent and mangos from Peru, whose campaign was getting started. From late October to mid-December, the price dropped to settle at slightly below 4.00 euros/kg. During the end-of-year festivities, Brazil faded as Peru progressed. The two origins were at this time fairly complementary, with Brazil offering a majority of large sizes, while Peru exported only small sizes. Rates rallied back to around 4.50 euros/kg, in spite of the less pronounced coloration of the fruit compared to Peru. The Brazilian campaign wound down rapidly in mid-January 2020, with prices following a downward trend again for the last sales (4.00 euros/kg, or less).



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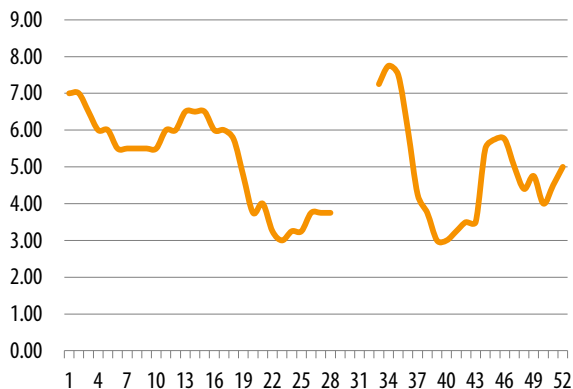
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A more fluctuating sea-freight campaign

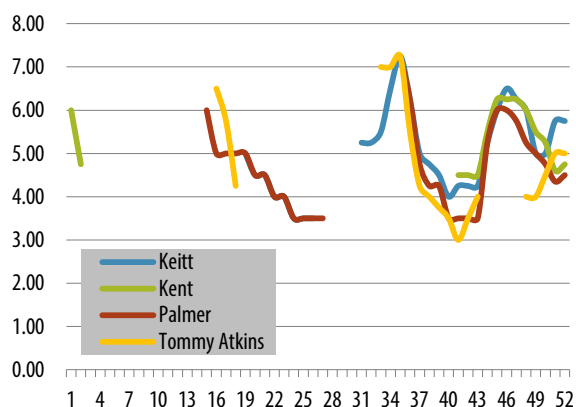
Apart from the above-mentioned near-hiatus in the supply in July/August, Tommy Atkins were present year-round, with prices fluctuating according to their exposure to the competition. Thanks to Peru's slow and late start at the beginning of the year, their prices settled at between 5.00 and 6.50 euros/box until April. They then dropped to 3.50 euros/box due to the overall swelling of the market caused by incoming shipments of other Brazilian varieties (Palmer), and shortly afterwards by massive volumes from West Africa. For the past several years, Brazil has stepped up its exports in April, which corresponds to the turning point between the end of the Peruvian campaign and the start of the West African campaign. The market occupation strategy at this time of year still entails some risks. If the Peruvian campaign ends quickly and the West African campaign is late in starting, the Brazilian presence makes up for the lack of merchandise and obtains good market conditions. Conversely, an extended Peruvian season and an early start by the West African origins cause a market overload, resulting in rates collapsing. The modification of Brazil's varietal range also becomes significant at this pivotal period, with a bigger share of Palmer, better suited to demand than Tommy Atkins.



Sea-freight Brazilian Tommy Atkins mango
Weekly average import price in 2019 in the Netherlands
(in euros/box | source: Pierre Gerbaud)

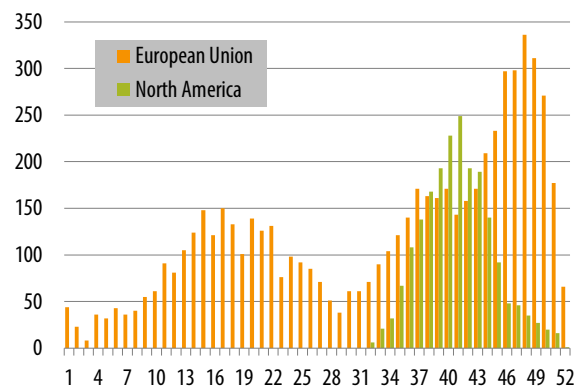


Sea-freight Brazilian mango - France - Weekly average import price in 2019 for various varieties
(in euro/box | source: Pierre Gerbaud)



Sea-freight Brazilian mango - Weekly incoming shipments in 2019 in the European Union and in North America

(in number of 40-ft containers | source: Pierre Gerbaud)



From May to August, Brazilian shipments became more discreet, and prices fluctuated according to the variations of the other origins better represented in quantitative terms. In late August, large-scale shipments restarted, with a high proportion of Keitt and Palmer. In the second half of August, Brazilian fruit obtained high prices (6.00-7.00 euros/box). They fell back in September, and reached their lowest level in mid-October (3.00 euros/box) because of the increase in shipments and the height of the competing Spanish campaign. In the second half of October, Brazilian mango rates rallied quickly with the start of the Kent campaign. They climbed up to 6.00 euros/box in mid-November, a period when Brazil largely became the sole market supplier. In December, rates ebbed again before stabilising at around 4.50-5.50 euros/box with substantial quantities. The Kent campaign wound down quickly at the start of the year with prices falling rapidly (2.00-4.00 euros/box), in the face of growing competition from Peruvian produce. However, the transition from the Brazilian to the Peruvian campaign was fairly fluid this year, due to Peru's gradual start and the simultaneous dip in incoming shipments from Brazil. The clash of massive quantities from the two origins, often feared, did not come to pass this year.

The Brazilian titan is trying and ultimately managing to adapt its commercial strategy, by gauging its exports and diversifying the export varieties ■

Peru

Boom running out of steam

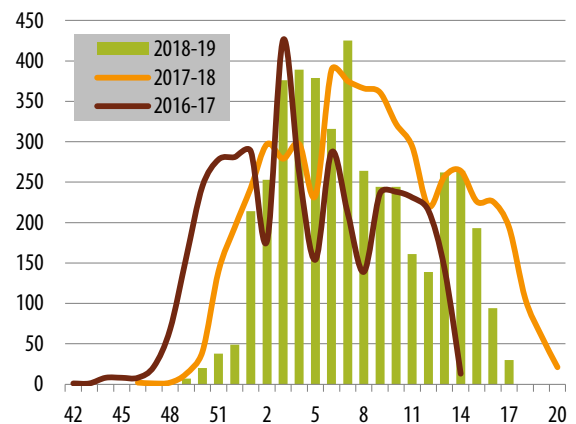
Peruvian mango exports apparently stood still in 2019. The downturn observed last campaign (5 000 tonnes), although moderate, is astounding, especially since this country has for years seen an exponential growth curve. This is probably only a hiatus in its exports boom, given the large-scale planting undertaken in recent years, with the new orchards gradually entering production. This fall can also be explained by less favourable meteorological conditions during the flowering and fruit-bearing phases.

A more condensed sea-freight campaign

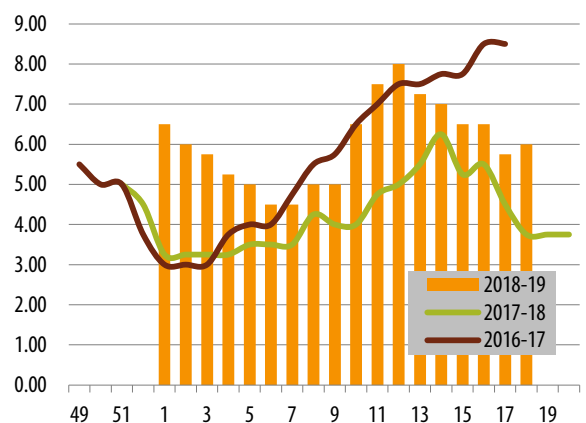
The Peruvian campaign started later than the previous year, and above all more slowly. In late 2017, incoming Peruvian shipments had already reached 150 containers per week in the second half of December, contributing to the European markets' supply for the end-of-year festivities. In late 2018, they were no more than 50 containers par week, leaving control of the market to Brazil. While this late start favoured a fairly harmonious campaign transition between Brazil and Peru, it caused an unusual under-supply at the beginning of the year. In January 2019, incoming Peruvian shipments came more into line with previous campaigns, increasingly greatly from the second half of the month. From mid-January to mid-February, the quantities received caused a considerable drop in prices, from 6.50 euros/box at the start of the campaign to 4.50 euros/box one month later. As February ended and March began, Peruvian shipments were more irregular, but smaller overall than the previous year. Prices climbed more steeply than they had fallen. They reached 7.00 to 8.00 euros/box in mid-March, while volumes dropped to fewer than 150 containers per week. Shipments increased again in the following weeks to satisfy the Easter holiday demand, and prices declined until the end of the campaign (mid-April), when they more or less regained the high level from when they first entered the market. The dip in rates from mid-March, when volumes were moderate, corresponded to a considerable increase in Brazilian shipments. The combined incoming shipments exceeded the absorption capacities of the markets, and caused prices to take a downturn, across all varieties and origins. In spite of the downturn in Peruvian volumes on the European markets in 2019, the rates registered were distinctly higher than in the previous campaign. This comparison perhaps underlines the advantage of a smaller supply to obtain higher prices.



Peruvian sea-freight mango - Weekly incoming shipments in Europe (in number of containers | source: Pierre Gerbaud)



Peruvian sea-freight mango - Weekly average import price on the French market (in euros/box | source: Pierre Gerbaud)



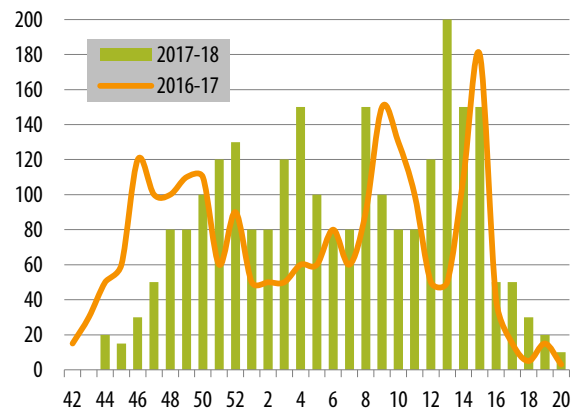
A more up-and-down air-freight campaign

When Peru made its first air-freight mango shipments to Europe in November, the Brazilian campaign was reaching full swing with Kent. The heavily supplied market rapidly took a downturn, with rates going from nearly 6.00 euros/kg to 4.00 euros/kg. The end-of-year festivities reinvigorated sales, and prices returned to around 6.00 euros/kg in the second half of December. In January, prices slipped again to 3.50 euros/kg, under pressure from volumes outstripping demand, even quieter at this time of year. The receipt of batches of advanced maturity also contributed to prices dropping. In February, rates recovered to around 5.00 euros/kg. They dipped again until mid-March (4.00 euros/kg), and then took off because of shipments gradually subsiding and stronger demand before the Easter holidays (6.00 euros/kg or more). The last batches, of more fragile quality, sold on a downward footing of around 5.50 euros/kg.

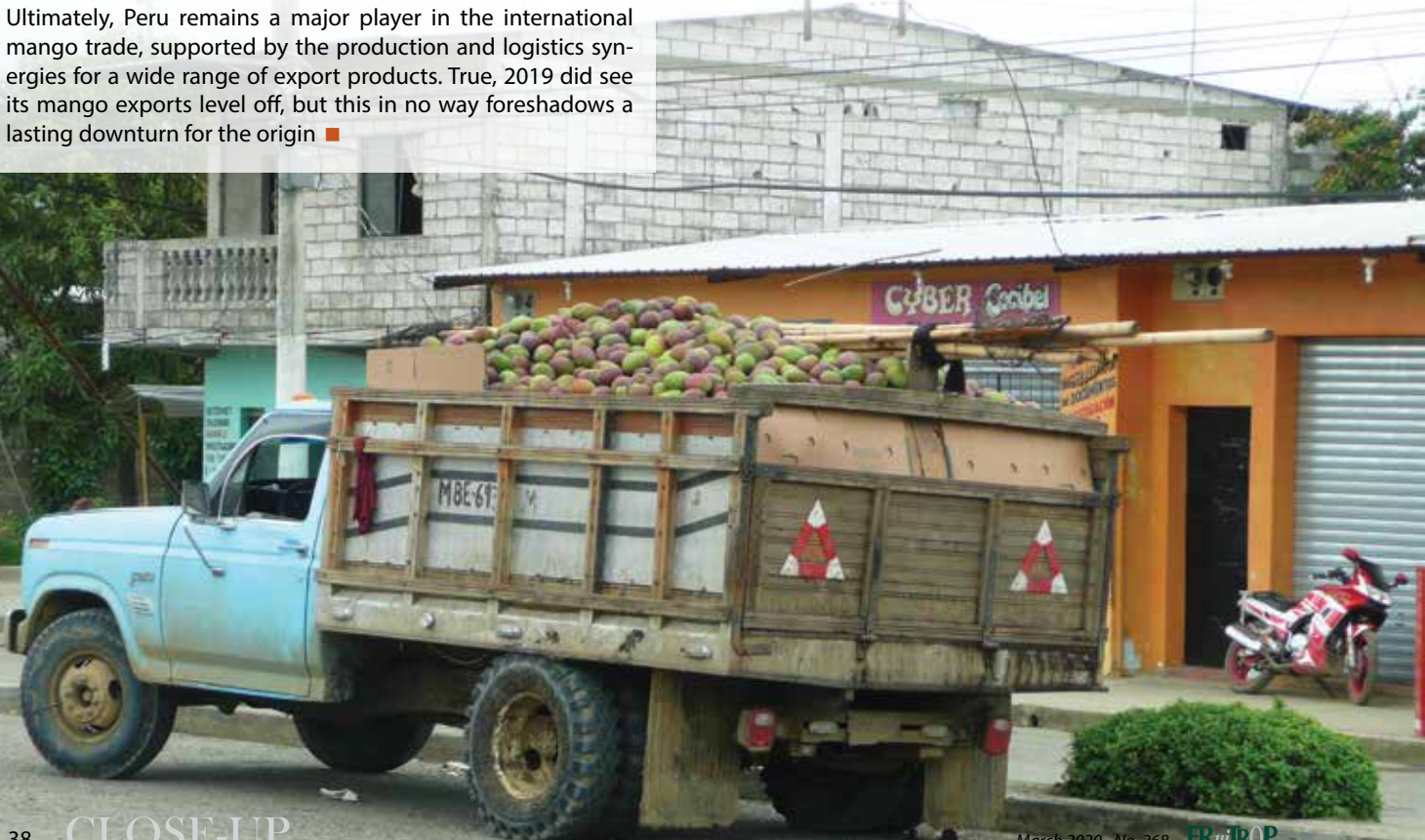
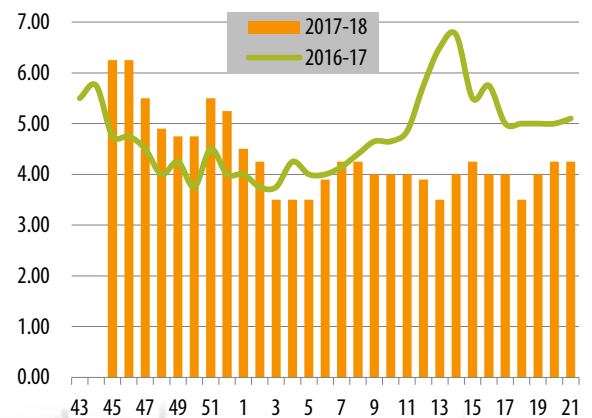
While air-freight mango prices fluctuated over the course of the campaign, this was not caused by competition with other origins. Peru is by a long way the main supplier to the European market from January to April. The competition only comes at the margins of the Peruvian campaign, i.e. in December with Brazil, or in April with the first West African shipments. So these price variations are caused by the irregularity of the flows, and by competition between shippers. Large quantities are received, especially by European operators, which as they lack sufficient local outlets, redirect them to the French, Belgian, and Dutch markets, etc. Often available at below market rates, this produce destabilises all market transactions. This low bidding system harms the fluidity of the merchandise and the economic returns of the industry players. In the long term it tarnishes the origin's brand image, although it is popular among European supermarkets and consumers.

Ultimately, Peru remains a major player in the international mango trade, supported by the production and logistics synergies for a wide range of export products. True, 2019 did see its mango exports level off, but this in no way foreshadows a lasting downturn for the origin ■

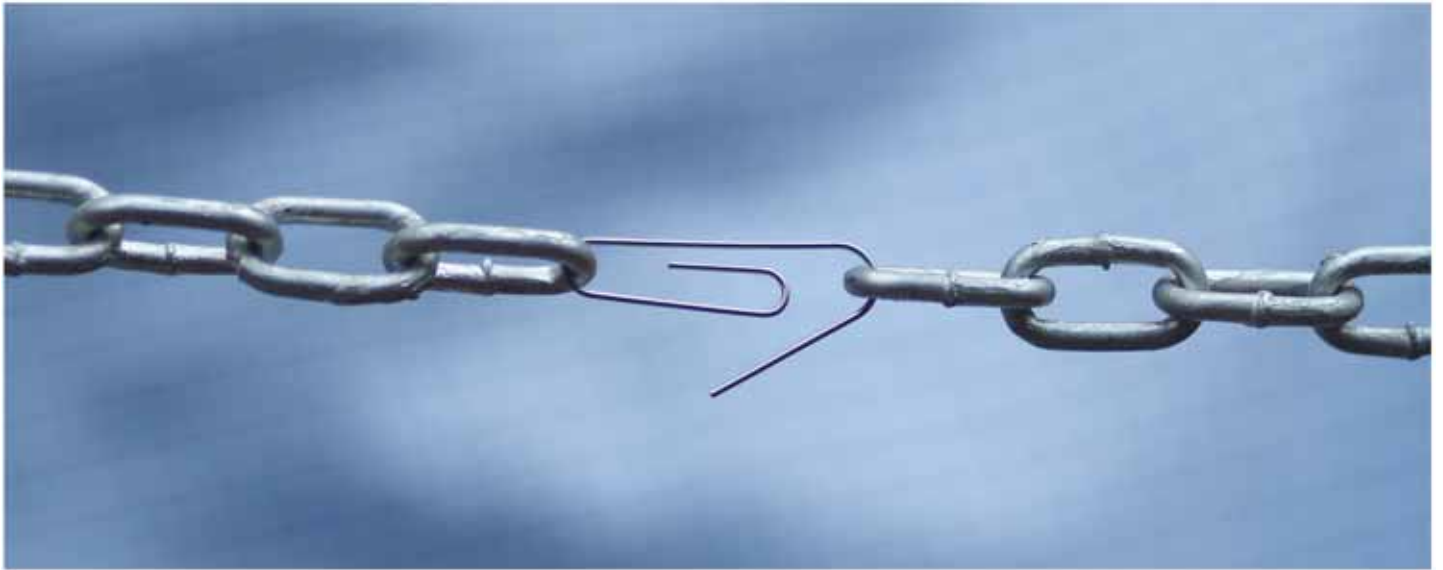
Peruvian air-freight mango - Weekly incoming shipments in France (in number of 40-ft containers | source: Pierre Gerbaud)



Peruvian air-freight Kent mango - Weekly average import price on the French market (in euros/kg | source: Pierre Gerbaud)



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reefer trends

Spain

An alternate bearing year

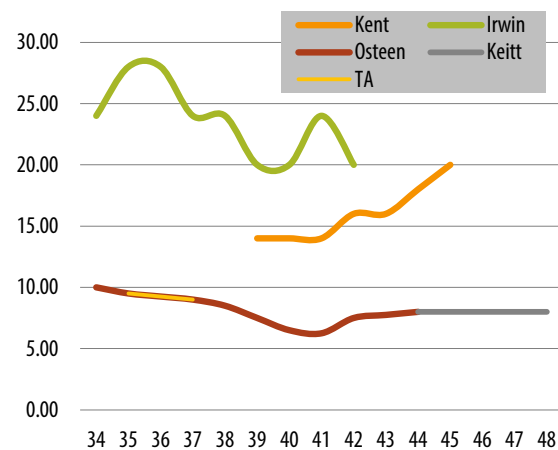
In 2018, Spain set an export record with around 32 000 tonnes. The 2019 campaign proved to be less abundant, with an estimated 20 000 to 22 000 tonnes. Less favourable weather conditions, as well as the alternate bearing downswing, doubtless caused a fall in production, and thereby in exports. The fact remains that this origin is heavily involved in the European mango supply between September and November. The Spanish campaign began in the second half of August with moderate volumes of Tommy Atkins, Osteen and Irwin. Tommy Atkins shipments were only temporary (3 weeks), in order to boost volumes of Osteen, the main variety produced and traded by Spain, which was relatively scarce at the time. In this period, the overall supply to the European market was very moderate, and sale prices high. Hence these initial shipments sold well. The same went for Irwin, which enjoyed a quality more like air-freight than sea-freight. In the face of weak competition, these batches, small in terms of volume but steady, also obtained high prices. The market conditions altered in the second part of September under the effect of the big increase in Spanish shipments, which combined with Brazilian shipments, also in their expansion phase, saturated the European markets.



© Guy Brehmer

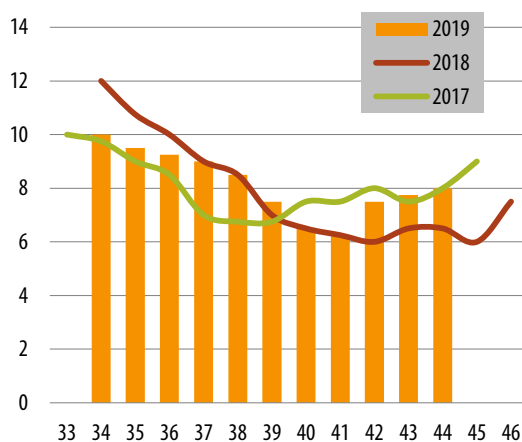
Spanish mango - Weekly average import price on the French market in 2019

(in euro/box | source: Pierre Gerbaud)



Spanish Osteen mango - Weekly average import price on the French market

(in euro/box | source: Pierre Gerbaud)



In October, the market swelled further, leading to stiff competition between Brazilian and Spanish mangos, both air-freight and sea-freight. Irwin rates dropped distinctly because of the bigger overall quantities, but also the supply being ill-suited in terms of sizing and more fragile quality. It was also this period that brought the start of Spanish Kent shipments, which clashed with shipments from Brazil in full swing. The prices for both origins tended to align, in a downward context. Spanish Kent prices strengthened in the second half of October, as volumes rapidly declined and shipments dwindled. Simultaneously, Osteen rates dipped because of massive shipments until mid-October. In the second half of the month, quantities decreased, enabling rates to partially strengthen until the end of the campaign. In November, the campaign continued with Keitt, which obtained stable prices along the same lines as the last batches of Osteen. Some marginal batches were still entering the market in early December, illustrating the extended presence of Spanish mangos on the European market.

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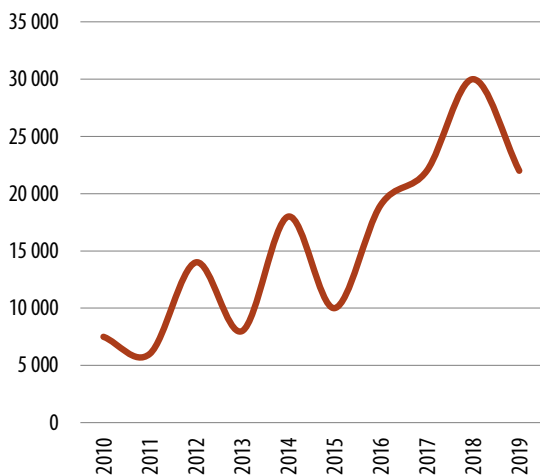
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2019 appears to have been an average campaign for Spain, with smaller volumes but also probably lower economic results. The 20 to 30 % reduction in exportable quantities of Osteen announced at the beginning of the campaign heralded a smoother-running and more profitable campaign than the previous one, which was heavier laden. This was apparently not the case, with the campaign progressing rather late, and encountering stiffer competition from Brazilian produce. The fact remains that Spain consolidated its place on the European markets, albeit doubtless with lower revenue due to the export trend. If we look at the evolution of Spanish shipments over the past decade, it is clearly apparent that the quantitative increase has come in fits and starts. Although the last three campaigns exhibit linear progress, 2019 too shows this rise in successive phases. The new plantations are gradually entering production, ensuring a reservoir of merchandise. However, during certain campaigns, there have been overlaps of unfavourable natural conditions and the alternating bearing effect on the orchards. And we should not forget that Andalusia, the cradle of Spanish mango production, is on the boundaries of the mango's favoured zone. The country has not reached its potential, insofar as the most recent plantations have not yet entered full production; Spain will probably soon regain a level of 30 000 tonnes, or even more ■



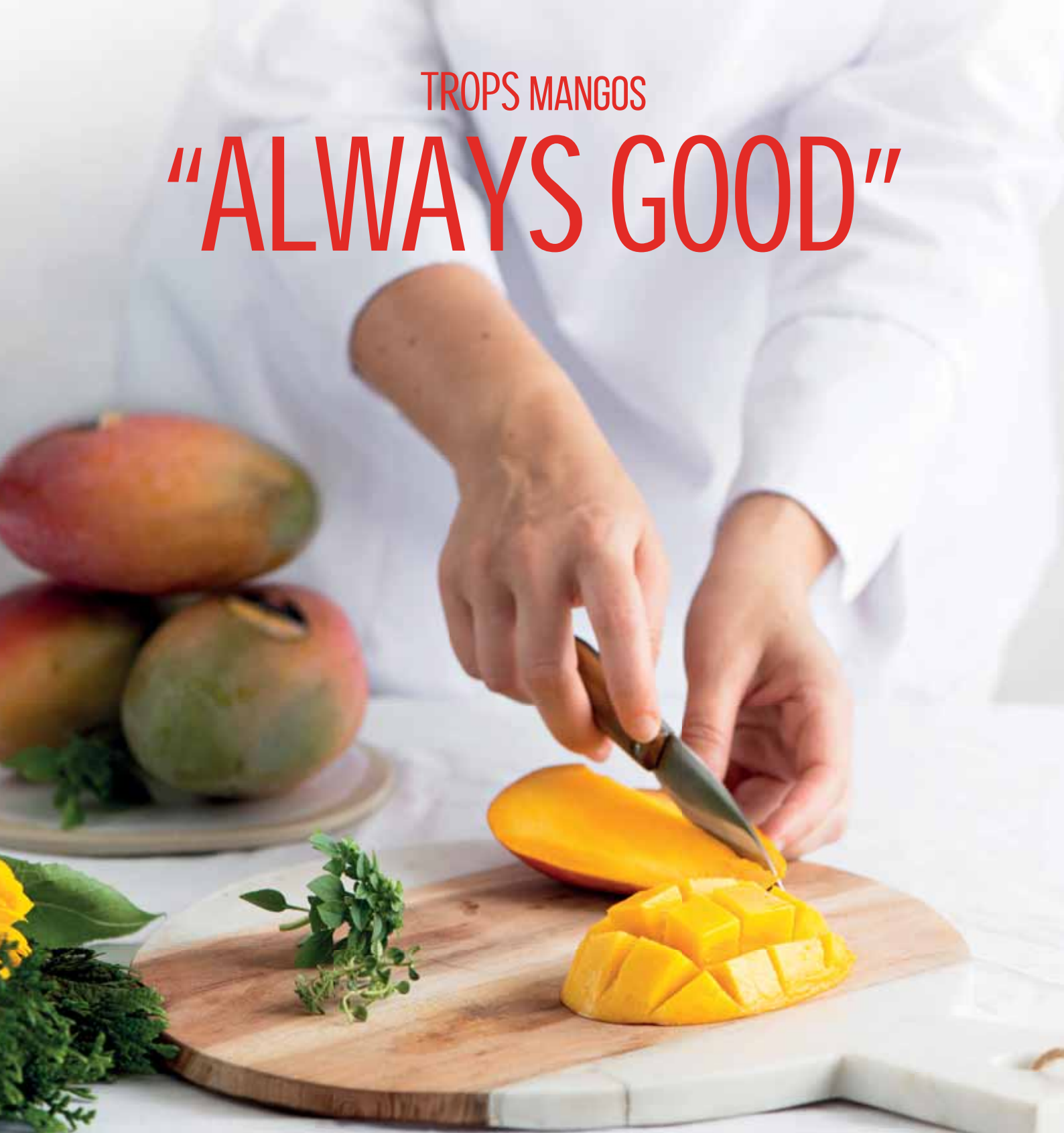
Mango - Spain - Evolution of exports
(estimates in tonnes | source: Pierre Gerbaud)



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West Africa

Block under heavy attack

The West African mango area managed a total of nearly 49 000 tonnes of shipments to Europe in 2019, as opposed to 41 000 tonnes in 2018, which shows its importance in the European supply calendar. Yet this rise has been impeded by a set of factors which are undermining the long-term future of these supplier countries. In summary, we can mention:

- the lack of qualitative homogeneity of the produce, especially due to the heterogeneity of the orchards;
- ageing of the orchards and their exposure to parasite developments (bacteriosis, mealybug, fruit fly, fungal attacks, etc.);
- the still partial organisation of the industries, particularly in the field of sanitary management of pests;
- the increasingly late start to the export campaigns, opening the door to competition from Peru and Brazil for sea-freight mangos, and from Mexico for air-freight mangos;
- the concentration of flows to Europe over a brief period, particularly from Côte d'Ivoire, detrimental to marketing fluidity.

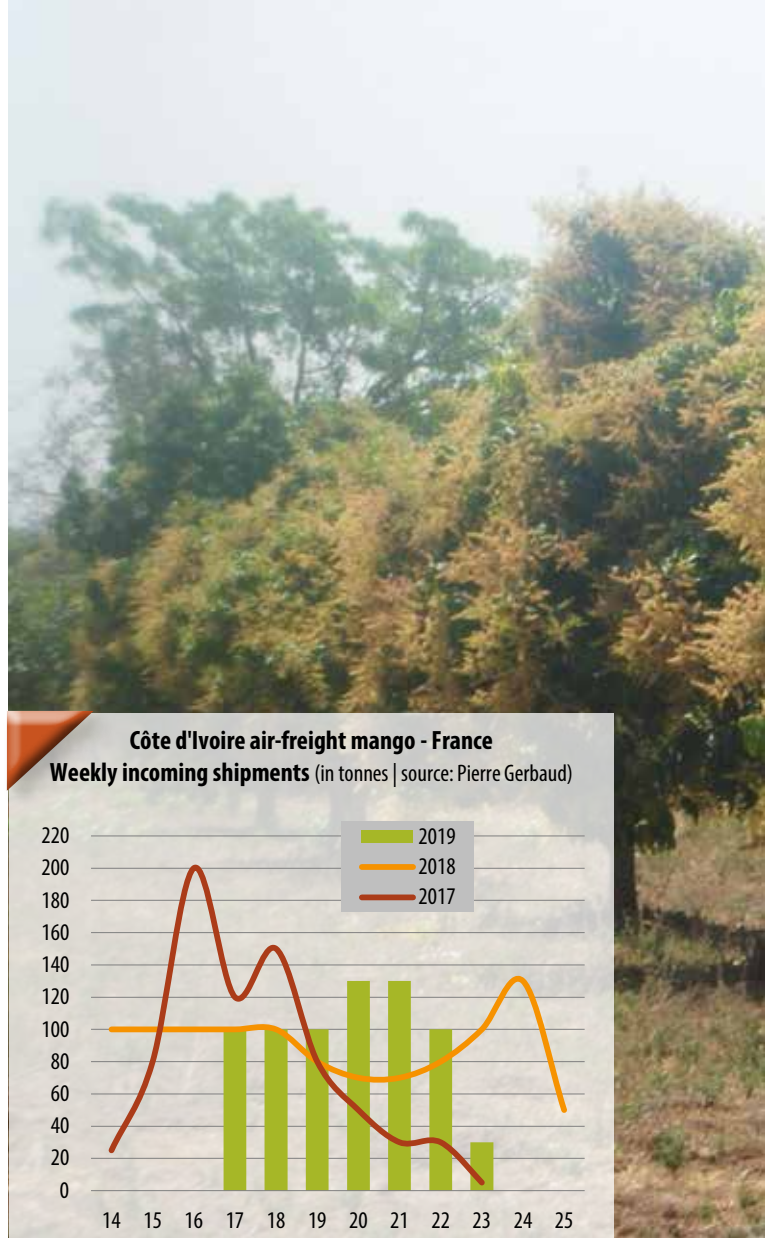
Côte d'Ivoire

Origin holding up

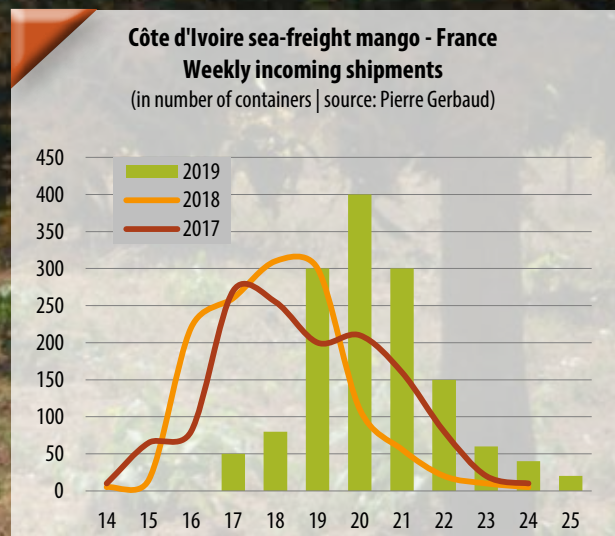
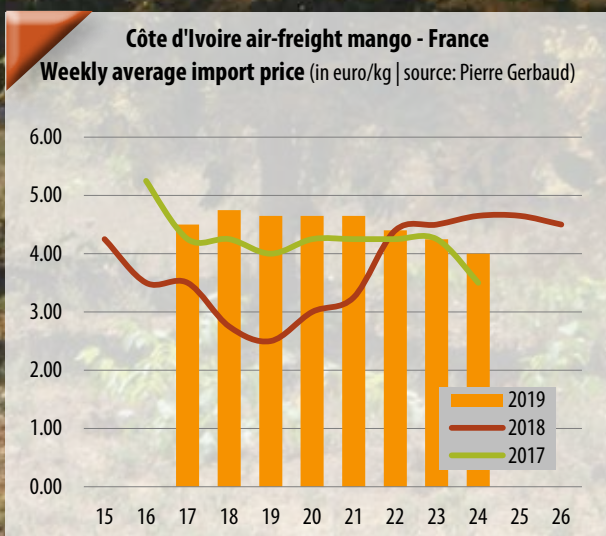
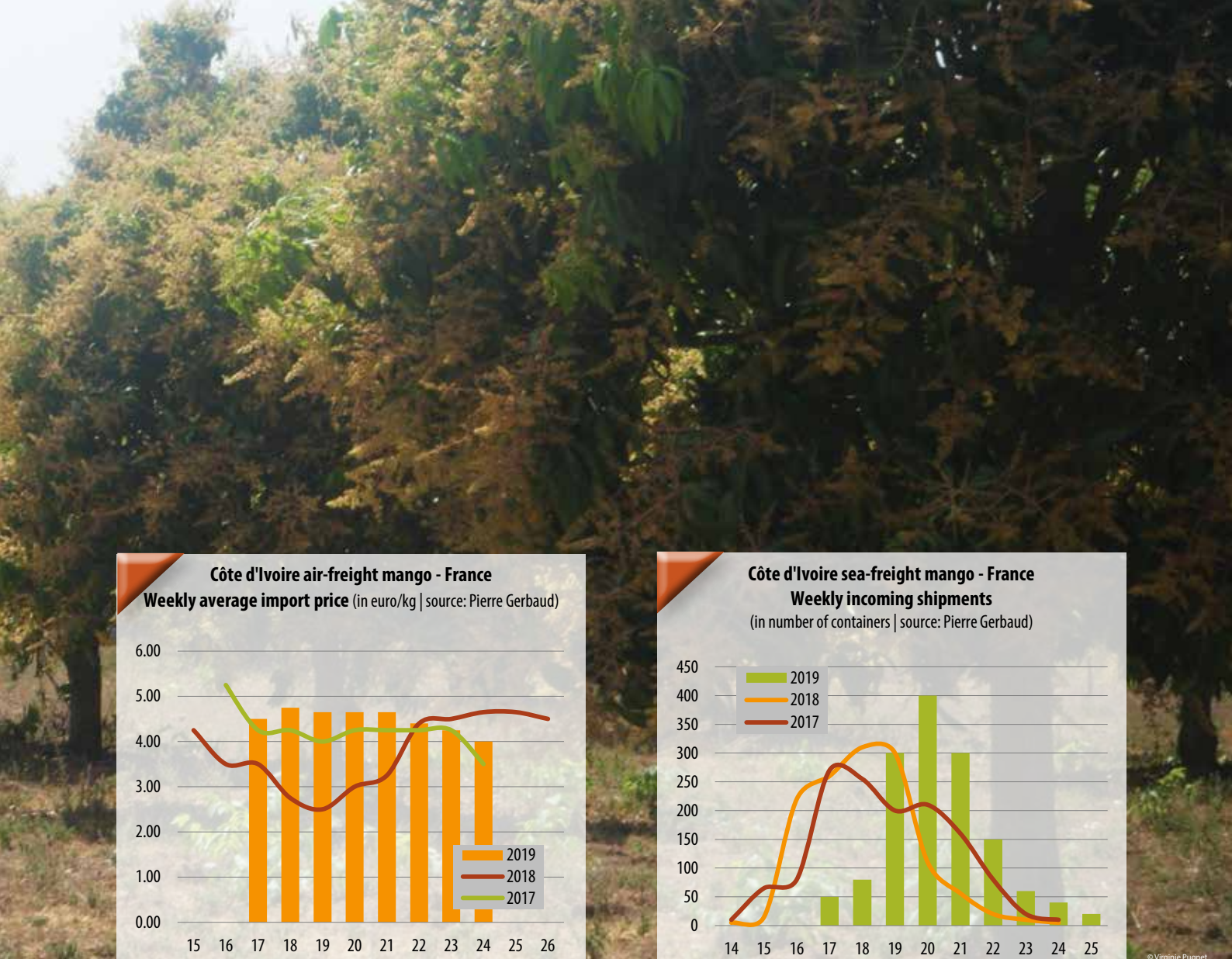
The number three supplier to the European Union (behind Brazil and Peru), and the flagship West African exporter country, Côte d'Ivoire is managing to withstand the assaults from competing origins. Export volumes in 2019 were similar to 2018, with 31 500 tonnes as opposed to 31 250 tonnes. This result of around 30 000 tonnes has remained stable for several years, showing the vigour of Ivorian exports, insofar as variations from one campaign to another have been minimal. The country's large production enables it to wipe out major fluctuations due to the natural alternate bearing phenomenon of mango orchards, and seasonal meteorological vagaries.

A more condensed air-freight campaign

The air-freight campaign got off to a later start this year, at the same time as the sea-freight campaign. The first batches were received in the last week of April, thereby



missing placement on the supermarket sector for the Easter holidays, a period generally enjoying good market conditions. With Peru gradually withdrawing early from the European market, Ivorian mangos sold for stable prices of around 4.50 euros/kg until mid-May. Shipments stopped in the second half of the month, and sales only involved fruit already received. The campaign had a tougher ending, with more marked competition from Mexico, which was on its upward phase. Prices dropped, ending up below the 4.00 euros/kg threshold. Some purchasers abandoned Ivorian mangos this year, going directly from the Peruvian supply to the Mexican supply. This phenomenon was doubtless caused by the Peruvian campaign's tendency to extend to the end of April, and the early start by Mexico in the face of the late start by Côte d'Ivoire. There was only a two-week absence of air-freight mangos between these two origins. Purchasers generally favour longer campaigns. Hence by listing Mexican produce following on from Peruvian fruit, they covered a period of practically eight months with just one change-over. Taking on Ivorian produce would have required a short-term change of supply (8 weeks). Volumes of air-freight mangos entering the market were estimated at around 500 to 600 tonnes, i.e. a tiny proportion out of the total quantities shipped by the country.



Sea-freight campaign: the May wave

The first batches appeared on the European market in late April, three weeks later than the previous year. Those containers of Amélie that were present, shipped in advance to satisfy Easter demand, sold at around 4.50 euros/box with insignificant quantities. Late starts to the campaign seem increasingly frequent for this origin, which increases risks of head-on competition with the Latin American countries. It is only in early May that the Ivorian supply swelled, with increasingly large quantities. They made up 75 % of the 31 500 tonnes exported by this country over this very short period. The first sea-freight mangos on the market in early May sold at high prices (7.00 euros/box, and then 6.00 euros/box), given Peru's early withdrawal. The Ivorian shipment peak came in mid-May. Thereafter, rates collapsed while the quantities available still represented two-thirds of the origin's total exports. From 6.00 euros in mid-May, the price per box lost on average 1.00 euro per week. It stabilised in late May/early June at around 3.00 euros, with some sales made at lower prices. And on 26 May, the Ivorian authorities announced the closure of the export campaign because of the number of interceptions

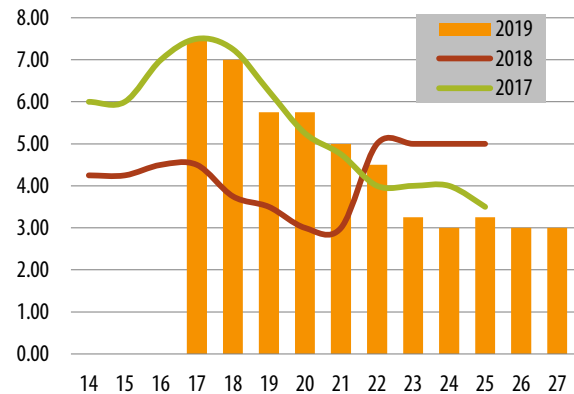
(5) since the start of the campaign due to fruit flies. This decision put a stop to exports, albeit without reducing the overall shipment volumes. Many exporters had halted their campaigns, and the merchandise was already drifting toward the European markets. However, some quantities were shipped after the closing date, especially some later Keitt, with special dispensation from the Ivorian authorities. The massive flow received in May did not sell off quickly. The start of the seasonal fruits and the variable quality of the mangos on the market wiped out sales, and contributed to stocks forming. This set off a cycle of storage – qualitative deterioration – falling prices. If the first third of the campaign can be regarded as satisfactory, the following two thirds proved to be harder. The last sales were made in late June at around 2.50 euros/box.

What should have been a satisfactory campaign for Côte d'Ivoire became a treacherous path. Peru's gradual withdrawal provided a glimpse of a decent campaign. Yet Brazil's considerable presence at this pivotal period partially offset the Peruvian withdrawal. Due to their late start, Ivorian exports only enjoyed good market conditions for a limited time frame. The massive shipments in May concentrated nearly all volumes into just three weeks. It was thereafter a case of trying to make the accumulated stocks pay. Commercially, this configuration was not the

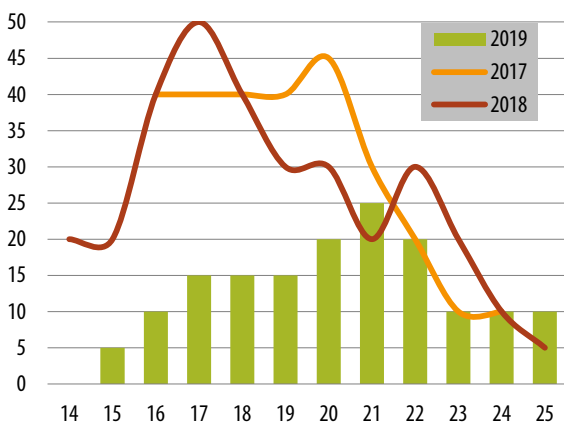
most favourable. On top of this, the fruit lacked homogeneity, undermining the brand image of the produce and putting off European supermarket sector purchasers from the Ivorian supply.

The late start to the campaign, the stronger competition from the Latin American origins and the heterogeneous quality of the Ivorian batches were the main reasons for its mediocre results for 2019. On top of these, there was also phytosanitary regulatory pressure, forcing the operators and public authorities to increase investment in managing pests affecting fruit production. Despite the measures taken, Ivorian exports suffered ten interceptions because of the fruit fly, which were behind the closure of the campaign by the national authorities. In spite of all these hindrances, Côte d'Ivoire consolidated its quantitative hold on the European market, though it did not manage proportional economic results ■

Côte d'Ivoire sea-freight Kent mango - France
Weekly average import price
 (in euro/box | source: Pierre Gerbaud)



Malian air-freight mango - Weekly incoming shipments on the French market (in tonnes | source: Pierre Gerbaud)



Mali

A mainstay for West Africa

In 2019, Mali again increased its involvement in the international mango trade, despite the country's latent geopolitical crisis. Malian exports to Europe rose considerably from 2018, going from approximately 7 000 tonnes to 9 700 tonnes in 2019. While this represents only a tiny proportion of estimated production, the mango industry plays an important role in the country's economy. Moreover, inter-continental exports make up only part of this sector. The majority of Malian exports were made within the sub-region, with approximately 30 000 tonnes shipped to neighbouring countries, especially Burkina Faso, Senegal, Mauritania, Gabon and Ghana. Several of these countries have limited production for the intense demand, or production calendars outside of Mali's production period. These neighbouring markets offer an additional opportunity for Mali to make its large production pay outside of its domestic market. For the past several years, another outlet has opened up. This is Morocco, whose demand has constantly increased, taking in 3 300 tonnes of Malian mangos in 2019, mainly by road-freight. Another outlet is the processing sector, with an estimated dried mango production this year of 75 tonnes, primarily distributed on the national market or within the sub-region, as well as 8 600 tonnes of purée, concentrate, etc., mainly sold on the local market and 20 % on the export sector.

Exports from Mali to Europe, in decreasing quantitative order, were shipped to France (49 % of total fresh mango exports), followed by the Netherlands (29 %) and the United Kingdom (15 %). Belgium, Germany, Spain, Poland and Switzerland received marginal quantities of around 1 to 2 % of total exports.



A limited air-freight campaign

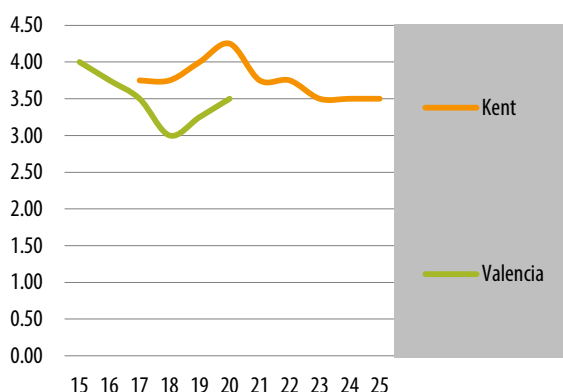
Air-freight exports represent only a small proportion of the total, at a reported 150 tonnes or so. This seems a low figure, since a few years back Mali was shipping around a thousand tonnes by air-freight. The 2019 campaign started in the first third of April with the Valencia variety. At this period, Peruvian shipments dipped, which meant that this variety was well valued, as an alternative to the Peruvian supply at high prices (6.00 euros/kg). Yet the qualitative irregularity of Malian fruit in terms of coloration and maturity stage rapidly caused a price drop. After levels of 4.00 euros/kg for the first batches on the market, sales were made two weeks later at around 3.00 euros/kg. This fall could also be explained by the receipt of Malian Kent from week 17. Valencia sales therefore became more difficult, although prices strengthened in week 20 for the last batches received. Kent prices remained more stable at between 3.50 and 4.00 euros/kg in May, before falling slightly to 3.50 euros/kg until the end of the campaign in June as Mexican volumes progressed.



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Malian air-freight mango - Weekly average import price on the French market in 2019

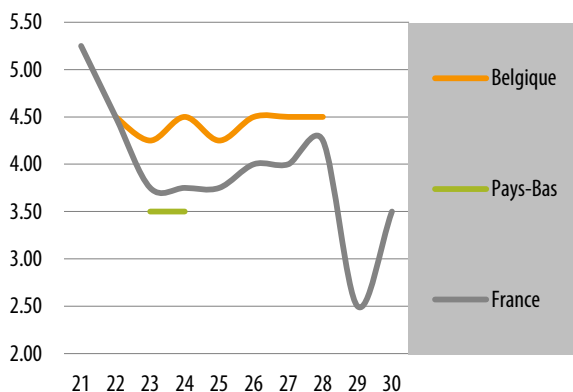
(in euro/kg | source: Pierre Gerbaud)



15 16 17 18 19 20 21 22 23 24 25

Malian sea-freight mango Weekly average import price in Europe in 2019

(in euro/kg | source: Pierre Gerbaud)



21 22 23 24 25 26 27 28 29 30

A flat sea-freight campaign

Mali focused its exports more on sea container transport. The campaign started in late April/early May, with some containers of Amélie. The gradual withdrawal of Peru and the better demand over Easter opened a narrow trading window, thus justifying these Amélie shipments. In reality, they did not obtain the anticipated economic results, since some containers, due to the vagaries of logistics, were delivered after Easter, and sold at low prices, especially since the fruit quality was dissatisfactory. The proportion of Amélie remained very low, since it was evaluated at 2 % of volumes shipped. Kent represented the vast majority of Malian shipments (more than 90 %). Their trading period extended from mid-May to July. During the first three weeks of the campaign, they sold from 4.00 euros/box to just over 5.00 euros/box. Prices then dipped in June due to the combined West African supply and weakening demand more focused on seasonal fruits, abundant and often available at attractive prices. Rates fell in the second half of July for Keitt (5 %), of more fragile quality and subject to competition from Senegal at the start of the campaign.

Sea-freight mangos from Mali also felt the weight of incoming shipments from Côte d'Ivoire, particularly in May. In June, market conditions were slightly altered, insofar as Ivorian shipments were suspended and sales only related to stored merchandise of more haphazard quality. Malian mangos traded more easily due to their more recent arrival.

Mali maintained its place as a European market supplier in a difficult context, due to its landlocked location (longer transport times and higher prices) and to competition from neighbouring origins with simultaneous export campaigns. In spite of efforts on fruit sanitary quality, Mali set an unwanted record for the number of interceptions (16) from West African origins for the presence of the fruit fly. We can also note 13 interceptions for reasons of missing or incomplete documents, another recurrent problem for the origin, yet easier to correct ■

Sources: Eurostat, SKB Mali, Pierre Gerbaud



Burkina Faso Another rise

Back in 2018, Burkina Faso was building up its exports to the European markets, with more than 5 800 tonnes. The 2019 campaign confirmed this rise, with an additional one thousand tonnes, nearly reaching 6 900 tonnes. Sea-freight shipments represented 80 % of the total involved in international trade, with road-freight and air-freight accounting for 11 % and 9 % respectively, i.e. approximately 600 tonnes each. Intercontinental shipments were sent to France, the Netherlands, Belgium, Italy, Germany, Switzerland and Sweden. Nearly 1 400 tonnes were shipped to countries within the sub-region (Ghana, Niger and Côte d'Ivoire). The domestic market remains the main target destination, with more than 70 000 tonnes sold both on local markets and sent for processing. Traditionally involved in this sector, Burkina Faso has consolidated its place as the number one dried mango supplier, which are mainly marketed with the organic label. This sector is on the rise, and dried mango volumes reached more than 3 000 tonnes this year, the bulk of which was exported to the European Union, the USA, and to a lesser degree ECOWAS countries. Its activities are rounded off by purée production, with 3 700 tonnes, sold mainly at national and regional level.

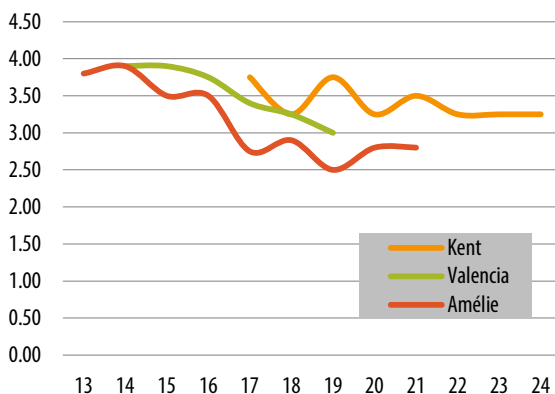
The air-freight campaign started in the last week of March with Amélie, which were quickly followed the week after by the first Valencia batches. Amélie rates gradually dropped to stabilise at between 2.50 and 3.00 euros/kg

from the last week of April. They represented only marginal quantities aimed at retailers well-versed in this particular variety. Trading continued until the second half of May. The Valencia campaign was more condensed, concentrated in April. Their price eroded bit by bit because of very moderate demand due to competition from Kent supplied by all the West African origins. Valencia tends to find a trading window when the supply is small and when there is a more or less marked absence of Kent. This year there was not really any break in the Kent supply. In addition, Burkinese mangos exhibited mediocre quality, especially a lack of shelf life, detrimental in tough trading periods. Kent shipments began in late April, and extended until mid-June. From a level of 3.50-4.00 euros/kg at the beginning of the campaign, their prices quickly settled to between 3.00 and 3.50 euros/kg until the end of the period. As with Valencia, Kent suffered competition from the other origins, and their fragile quality prevented them from being better valued under the market conditions at the time.

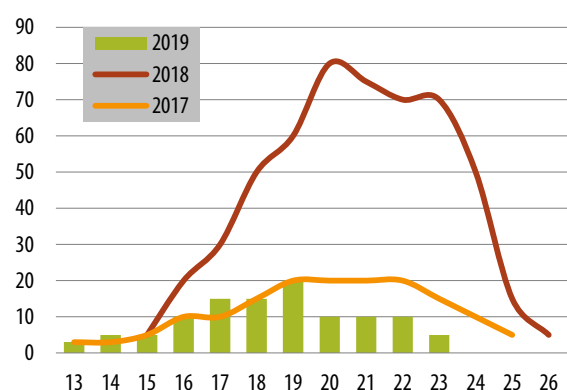
The sea-freight mango campaign ran parallel to Mali's, between mid-May and mid-July. This fruit's market performance was concealed amidst the big flow from the other West African origins. They were largely marketed in Northern Europe, and were less visible on the French market. West Africa's number three mango origin, Burkina Faso confirmed its position in spite of trading difficulties, fluctuating according to the general context of the European market. Although prolific, the country's production comes from ageing orchards, often modest in size and scattered across several regions. These factors make qualitative homogeneity of the fruit more complex. On top of this, the parasite pressure is hard to control given the make-up of the orchards and the resources available to combat this problem. Over the course of the 2019 campaign, Burkinese produce sustained ten interceptions on the European borders because of the presence of fruit fly. The measures taken by professionals and the public authorities, although increasingly extensive, still seem insufficient for the scope and complexity of the phenomenon ■

Sources: Eurostat, A.P.E.M.A.B, Pierre Gerbaud

Burkina Faso air-freight mango - Weekly average import price on the French market in 2019
(in euro/kg | source: Pierre Gerbaud)



Burkina Faso air-freight mango Weekly incoming shipments on the French market
(in tonnes | source: Pierre Gerbaud)





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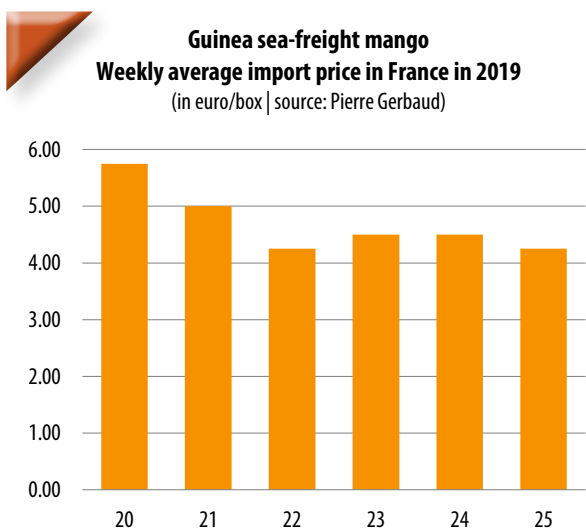
Guinea

A top-up West African origin

True, Guinea exports distinctly smaller mango volumes than its neighbours operating during the same period. The evolution of exports over the past decade has been fairly chaotic, with big variations between campaigns. After bigger exports between 2012 and 2015, volumes saw a three-fold reduction in 2016 and 2017. For the past two years, Guinean exports seem to have been returning to growth, at a more measured tempo. While the country has a big potential, like its neighbouring origins, the production and export constraints are heavily curbing its development on the international market. In 2019, the European markets received nearly 700 tonnes over a period concentrated from late April to late May. Shipments primarily comprised Keitt, providing varietal diversity outside of Kent, omnipresent at this time

from the other West African origins. Practically absent from Guinean shipments in 2018, Kent made a hesitant appearance in 2019, but does not yet seem to have passed the marginal level of 10%. This proportion should increase in the future.

The sale prices registered were often aligned with those for competing West African origins, better represented in terms of volume. Guinean mangos were sent mainly to the United Kingdom, Belgium and to a lesser degree France. They sustained one interception because of the presence of fruit fly in June, when the bulk of exports had already been made. This origin, making barely a ripple among the West African suppliers, is bit by bit regaining a positive trend, with high-quality produce ■



© Eric Imbert

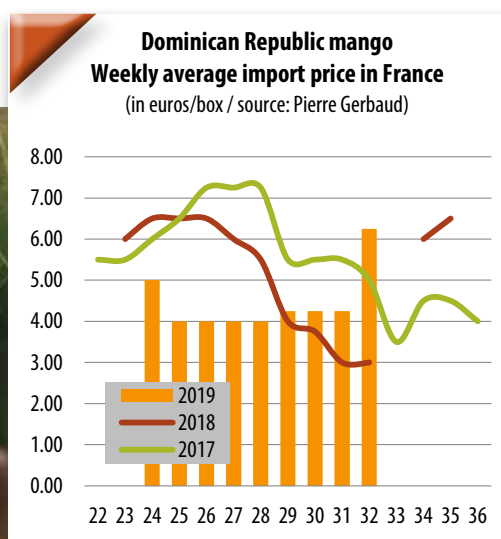
Dominican Republic

A more concentrated and difficult campaign

In 2019, the Dominican Republic took a new step in its development on the European markets. In recent years, its mango exports have been between 11 500 and 14 700 tonnes. For this campaign, they leapt to more than 17 000 tonnes, setting a record for this supplier country. Yet this expansion did not come without commercial difficulties. The first batches went on sale in mid-June, three weeks later than the previous year. At this point, the market was heavily laden with produce from the end of the West African campaign, of variable quality and selling at low prices. Dominican fruit struggled to find its place, especially since it soon exhibited symptoms of fungal diseases and poor shelf life. Prices went from 5.00 euros/box to 4.00 euros/box on average after one week's trading. Aided by increasing volumes, this price level would prevail throughout July on all the recipient markets, with some sales made at lower prices. In the second half of July, the smaller quantities available helped rates strengthen, though sales remained

tight. Consumption of tropical fruits was declining due to marked competition from seasonal fruits, abundant and available at attractive prices. In early August, market conditions stabilised with the liquidation of residual batches from West Africa. As the Dominican campaign was winding down, prices took an upturn, up to 6.00 euros/box for good quality fruit. The campaign came to an end two or three weeks earlier than in 2018.

The considerable rise in quantities shipped, the recurrence of qualitative problems from the start of the season and the general situation of the European market, unfavourable in June and July, considerably held back the economic results of the Dominican mango. They differed from the previous two years, when sales in the first part of the campaign were satisfactory. This origin's increasing exports this year came at the expense of quality of the produce, and its brand image on the European markets ■



© Carolina Dawson

Senegal

An origin staying on course

In 2019, Senegal exported slightly fewer mangos than the previous year. Yet this downturn in no way compromised its place on the list of the main suppliers to the European market. This origin achieved fourth place, exporting nearly 17 000 tonnes. Adding nearly 3 000 tonnes shipped to countries within the sub-region, exports totalled approximately 20 000 tonnes, which seems to have been the country's potential for the past few years. The mango represents a speculative venture for Senegal, which has a much wider range of export fruits and vegetables, setting a mark of approximately 108 000 tonnes in 2019 (source: DPV Senegal). Sweetcorn, watermelon, green beans, tomato, etc., are also contributing to the vitality of the country's horticultural sector.

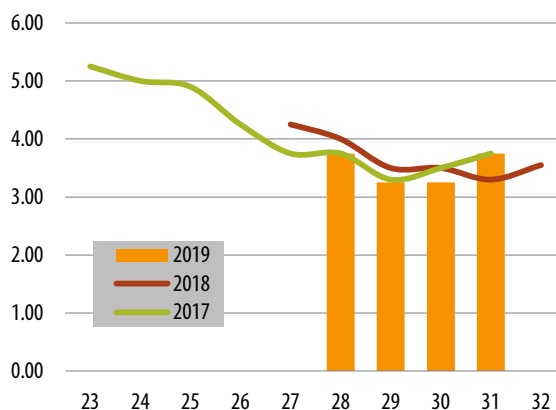
As in previous years, sea-freight exports predominated, representing nearly 95 % of volumes shipped. Road-freight accounted for approximately 4 %, and air-freight for approximately 2 % of the total on the market. Road-freight mainly involves shipments to neighbouring countries, but does not exclude longer-distance shipments. As for air-freight, it involves only a tiny proportion of exports, often reserved for the European market, as for fruit transported in sea containers.

The production regions of the export mangos contribute very uneven quantities to the export flows. Hence the vast majority of fruit (78 %) comes from the Niayes region, which accommodates the majority of the mango orchards. The number two production region is situated in the south of the country, in Casamance, which contributes 11 % of exportable mango production. It is this region which generally provides the first exports, due to its earlier calendar. The centre and north of the country make up the rest of the shipments, though with smaller quantities.



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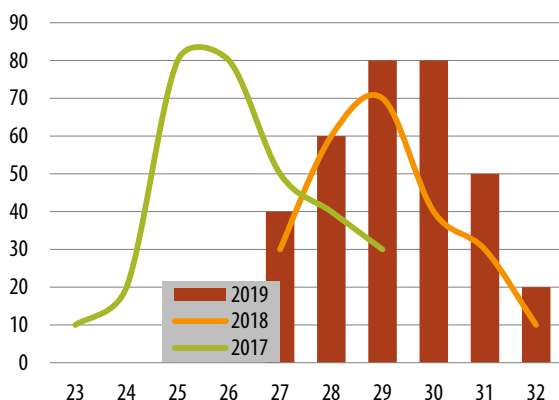
Senegal air-freight mango
Weekly average import price in France
(in euro/kg | source: Pierre Gerbaud)



A condensed air-freight campaign

For the last two campaigns, Senegal has started its air-freight shipments in late June/early July, whereas previously they started in early June. This later start does not seem to be due to delayed production, insofar as sea-freight shipments started in early June. It is more to do with the result of a commercial strategy consisting in avoiding competition with produce from other West African countries at the end of the campaign, for which sale prices are not always advantageous for exporters. The concentration trend of the air-freight campaign was also confirmed, with shipments coming to a faster end. Just a few years ago, trading of air-freight mangos from Senegal extended into the second half of August. Now it wound down at the start of the month, reducing the campaign period to just one month. This is doubtless not unrelated to the competition from Mexican mangos, at the height of their campaign. Many purchasers favour this origin for its longer trading time during the summer period. Fear of fruit fly infestations, as well as the development of fungal diseases at the end of the period, are also among the reasons for this concentration of the campaign. The price curve plotted corroborates the reduction in the amplitude of the Senegalese campaign, with lower prices than in the 2018 campaign, which was also longer-lived.

Senegal air-freight mango
Weekly incoming shipments in France
(in tonnes | source: Pierre Gerbaud)



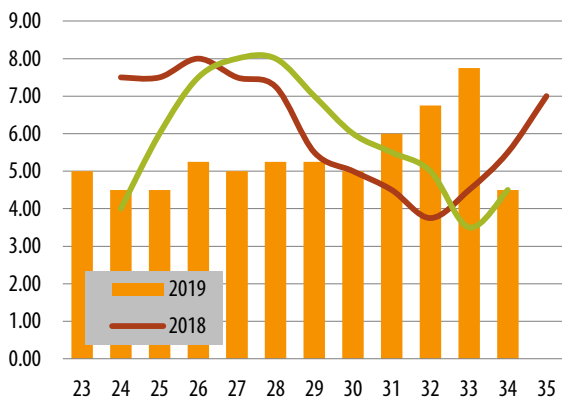
A difficult sea-freight campaign

The Senegalese sea-freight campaign started in early June, in a difficult context and following a practically reverse trend to the previous campaign. Arriving in early June, Senegalese mangos were faced with the problem of the end of the other West African campaigns, and more particularly Côte d'Ivoire. The massive shipments from Côte d'Ivoire in May led to the formation of large stocks, which sold slowly throughout June. Average prices settled at around 3.00 euros/box, with sales from 2.00 euros/box. Senegalese mangos, although fresher, found unfavourable market conditions for the start of their season. Nonetheless, they managed to earn around 4.50-5.00 euros/box, though with difficulty. Prices did not strengthen until mid-July, given the disappearance of Ivorian and Malian mangos. They saw a spectacular trend, reaching levels above 7.00 euros/box, with the depletion of Ivorian stocks leaving the market in a phase of marked under-supply. Senegal remained the sole Kent supplier, with volumes corresponding to early-summer demand. The campaign wound down in late August on a less favourable note. Rates returned to their early campaign level (4.50 euros/box) because of qualitative deterioration of the produce. The 2018 campaign had been completely

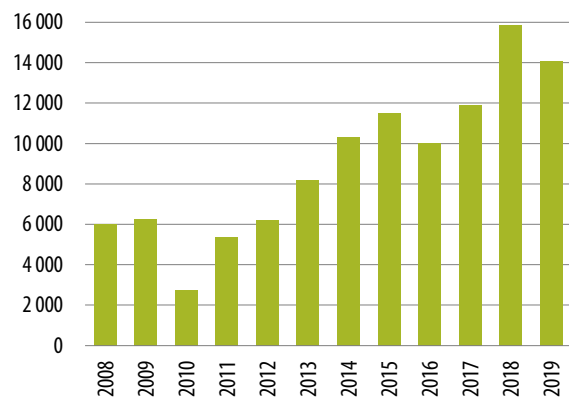
different, with high prices at the start of the period, collapsing in the second half of July, and climbing strongly in the second part of August.

In spite of the constraints encountered in the course of this campaign, Senegal provided a steady supply to the European market, reinforcing its status as a major supplier. The export calendar remains dependent on the delicate context of the summer period, with beforehand the end of the other West African campaigns, the development of European fruit production and the summer holidays, less favourable for tropical fruit consumption. Afterwards, the rise in volumes shipped by Israel can also represent an obstacle to Senegalese fruit, especially in August when mango quality becomes more fragile (fungal development). The strong point of Senegal remains its good control of the phytosanitary quality of the sea-freight fruit, which is improving year on year, with a smaller number of interceptions due to fruit fly (7 in 2019 as opposed to 10 in 2018). The commitment of Senegal's mango industry players to European regulatory provisions, which took effect in late 2019, is providing a glimpse of new opportunities for the origin ■

Senegal sea-freight mango
Weekly average import price in France
(in euro/box | source: Pierre Gerbaud)



Mango from Senegal
Evolution of European imports
(in tonnes | source: Eurostat)



Mexico

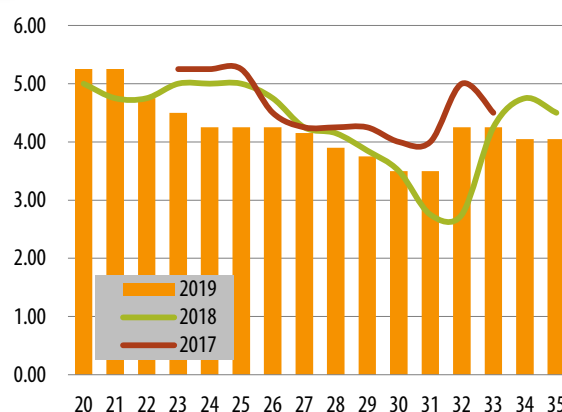
European market conquest ongoing

Back in 2018, Mexico supplied growing quantities of mango to the European markets, shipping nearly 4 800 tonnes. This trend continued in 2019, to a figure in excess of 5 200 tonnes. Mexico's export calendar is however not the best suited to European demand. It is concentrated between May and August, a naturally less favourable trading period for the mango due to competition from temperate summer fruits. Furthermore, the Mexican campaign starts while the West African campaigns are still active, with produce often sold at lower prices, given the still high supply level with often more fragile quality. Mexican exports began in this context. Very quickly, the Mexican mangos demonstrated heterogeneous quality in terms of coloration and stage of maturity. After a few weeks on the market, the start of the mango harvests in the Sinaloa region meant shipments of fruit with a more pronounced coloration, more popular among the recipient markets. Yet the increasing quantities and ongoing variations in the stage of maturity undermined the sales fluidity, and favoured stocks formation, despite the disappearance of the West African supply (except for Senegal). This fruit sold slowly from a footing of 3.00 euros/kg, with some batches of advanced maturity actually sold on commission on the wholesale markets. In late July, Senegal made a rapid withdrawal, leaving room for Mexican produce, which was also at the end of its campaign. Sale prices rallied slightly despite the appearance of fungal diseases.

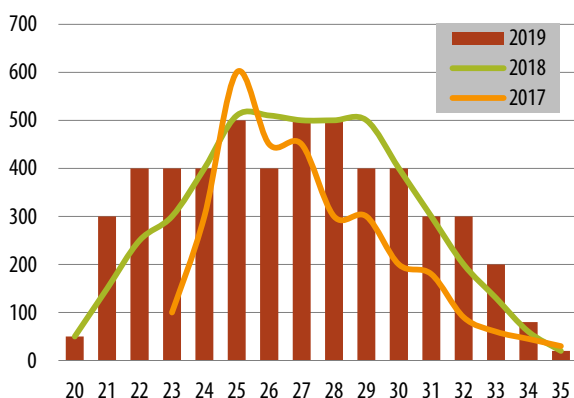


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Mexican mango - Weekly average import price on the French market (in euro/kg | source: Pierre Gerbaud)



Mexican mango Weekly incoming shipments in Europe (in tonnes | source: Pierre Gerbaud)

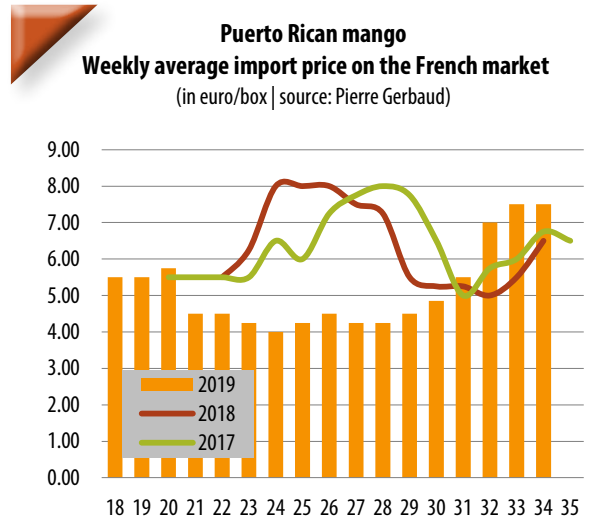


In spite of the qualitative problems encountered during the campaign, Mexican mangos sold without any major crises. The comparison with the West African end-of-campaign supply was rather favourable for this origin, which has maintained a good brand image among purchasers. Some even short-circuited the Ivorian supply, going directly from Peruvian to Mexican mangos, at the risk of briefly suspending their procurement. In this respect Mexico potentially poses direct competition to West African produce on the European markets. The homogeneity of the Mexican orchards in terms of size and management means that they can provide greater qualitative regularity of the fruit, a crucial factor for trade. We should also remember that a good few years ago now Mexican exporters were able to open up the particularly demanding Japanese market ■

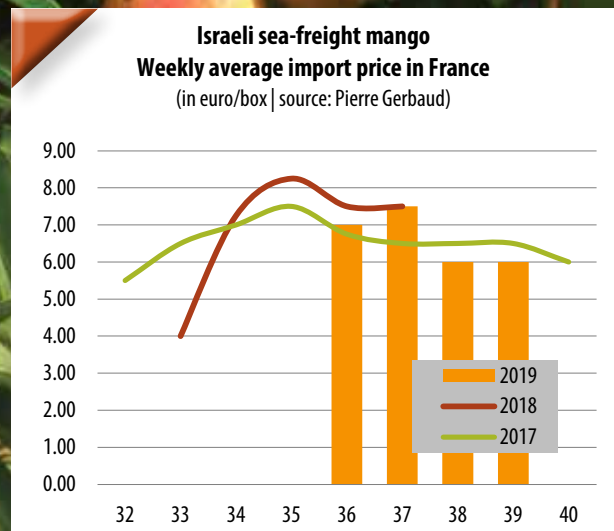
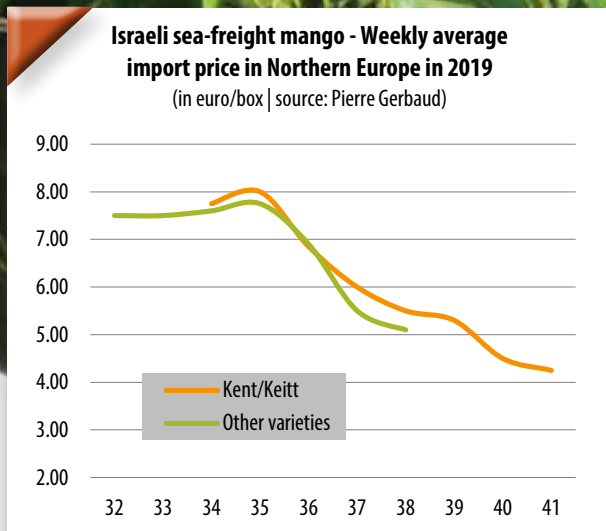
Puerto Rico

A difficult start with a smoother ending

For the second consecutive year, quantities shipped by Puerto Rico to the European market were down. After the 2016 and 2017 campaigns registering total exports of 11 000 and 12 000 tonnes, the Puerto Rican supply shrank by around 9 000 tonnes in 2018, and 8 300 tonnes in 2019. Starting off with Keitt two weeks earlier than the previous year (late April/early May), in May the Puerto Rican campaign soon clashed with massive shipments from the West African competition, leading to a marked price downturn. From levels of 5.00 to 6.00 euros/box at the beginning of the campaign, prices rapidly dropped to stabilise at around 4.00-4.50 euros/box until early July. This mediocre first half of the season was followed by a better period. Throughout July and up until mid-August when shipments ended, rates gradually recovered, to reach a higher level at the end of the season than at the beginning of the campaign. The late start to the Israeli campaign doubtless benefitted Puerto Rican merchandise, whose quality, standard but constant, matched demand from the European supermarket sector. The temptation of earlier shipments from certain origins during the Peru/West Africa transition, which remains one of the sensitive points of the European market's overall supply, is still not proving advantageous. The persistence of large West African volumes in May often drags the market



into a downward phase; especially because of the market complexity, on top of the competition from seasonal fruits. The profitable trading window is short and changeable between years. An early end to the Peruvian campaign does not necessarily herald good market conditions ■



Israel

A stabilisation campaign

After the downturn registered in 2018 (13 300 tonnes), which brought back Israeli exports to their 2015 levels, 2019 saw the return of an average result of 15 200 tonnes more in line with the origin's development. As a reminder, it set new records in 2016 (17 850 tonnes) and 2017 (16 580 tonnes). Israel and Spain make up the European market's Mediterranean supplier group. These origins, active in succession but with a period of overlap, occupy a large part of the European supply calendar from July to November. Over the years, this period has held a substantial position on the mango market, though it did not seem to be the most favourable because of the competition from seasonal fruits. It is also at this time of year that the varietal range is richest, with a wide selection specific to these origins. Another common point between these two origins relates to their proximity to the recipient markets, enabling them to develop intermediate quality between sea-freight mango and air-freight mango. There is a certain supply complementarity between the earlier Israeli campaign and later Spanish campaign. The comparison ends there, since these origins remain competitors during their shipment overlap period.

A late air-freight campaign

Unlike 2018 when the first air-freight batches were received in early July, Aya mangos kicked off the 2019 campaign just at the turning point between July and August, registering a three-week delay. With Maya arriving a bit later in the season, these varieties traded until late August, making up for their initial delay. They sold steadily for an average of between 4.00 and 4.50 euros/kg, with a dip at the end of the campaign (3.75 euros/kg). In mid-August, Omer, Shelly and Kent took over. Kent sold steadily for around 4.00 euros/kg in August, before dipping to an average of 3.75 euros/kg until mid-September. Omer and Shelly struggled more with value, at around 3.50 euros/kg. We can note that Shelly enjoyed fine coloration at the end of the campaign, thereby earning stronger demand in the absence of Kent.

A more mixed sea-freight campaign

The first sea-freight shipments to the French market were also delayed, until early September. The campaign extended over a short period of one month with Kent, quickly followed by Keitt. Demand was strong from the market, under-supplied at the time, and prices for Israeli mangos settled at 7.00 euros/box for the first half of the month, before dropping to 6.00 euros/kg. On the other European markets, the Israeli campaign was more extensive, starting in early August i.e. just two weeks later than in the previous campaign. Primarily comprising the Omer and Shelly varieties, Israeli shipments were valued at 7.50 euros/box throughout the month of August. Kent shipments began in the second half of the month, followed by Keitt (8.00 euros/box). From the beginning of September, rates gradually dipped until the end of the campaign, when in the first half of October they reached half of their initial value. The increase in shipments from Brazil with Keitt, and from Spain with Osteen, swelled the market considerably and weighed heavily on prices, across all origins.

Ultimately, the Israeli campaign can be regarded in a fairly positive light, insofar as the highest prices were registered during the seasonal peak. Conversely, the end of the period was hindered by the campaign being delayed and extended ■



Israeli air-freight mango - Weekly average import price in France in 2019
(in euros/kg | source: Pierre Gerbaud)

