The European Mango Market: a Promising Tropical Fruit

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The market appeal and consumption of mango, the 5th-ranking fruit produced in the world, are sharply increasing in developed countries, especially in Europe. There are many producing countries, but imports are higher from the Americas than from Africa.

Mango is one of the most important fruits marketed in the world, its appeal and consumption are booming in developed countries, especially in Europe. Improving the relation between supply and demand, with respect to consumption periods and varieties, should enhance market development and, in turn, improve taste quality of export mangos.

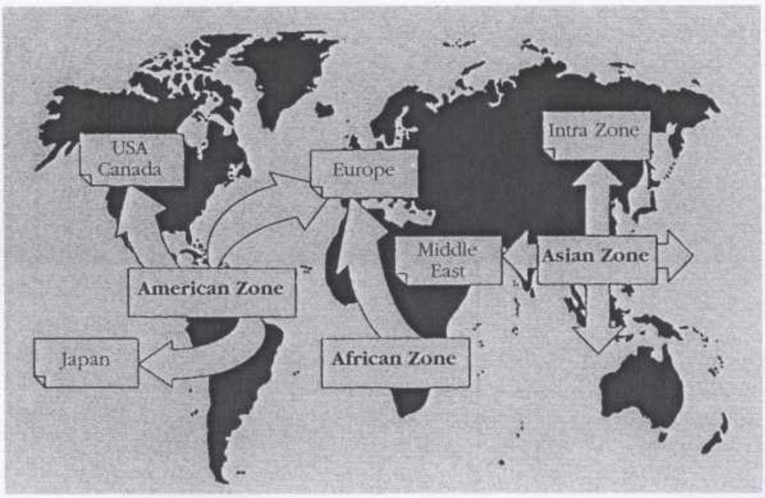
Asia, the main production region

Mangos, the 5th-ranking fruit crop worldwide, are produced extensively in about 70 countries. According to the latest FAO figures, the yearly growth rate for mango production is slightly less than 2%.

Most mangos are grown in developing countries, with India as the undisputed leader (10 Mt — 60% of the world output); then far behind come Mexico (854 000 t), Pakistan (780 000 t) and Thailand (614 000 t).

Asia predominates in the geographical distribution of mango production, with 80% of the world output, followed by the Americas and Africa at much lower rates of 13% and 7% respectively.

Figure 1
Main trade flow directions for mangos
Source: ODM CIRAD-FLHOR.



Central and South America, two important export regions

The global trade volume for these regions is estimated at more than 250 000 t.

Mexico, with nearly 100 000 t, is the world leader for mango exports. The US market, its major outlet, absorbs 90% of these exports.

Internationally, as shown in Figure 1, three trade flow directions have developed over the years:
– South and Central American countries supply the North American market, Europe and Japan;
– Asia preferentially exports to countries within its own region and to the Middle East;
– Africa markets most of its fruit on the European market.

the United States and Europe, the main importers

USA, with over 76 000 t of imports, is by far the top world import market (Appendix 1). Despite a slight slump in 1992, there has been a 30% average yearly mango import growth rate in USA since 1988.

Although the respective import rates for Canada and Japan (Appendix 1) are only, at best, a quarter that of the EU, these two markets have been increasing steadily over the past few years.

The EU, 2nd-ranking world importer of mangos, imported 46 000 t in 1992. The development of the EU import market since 1975 is illustrated in Figure 2.

Three countries consume more than 75% of the mangos imported in Europe: UK, Germany and France (Fig. 3).

The UK is by far the top European consumer, because of the oriental ethnic communities settled there and its privileged relationships with countries such as Pakistan and India. The UK is also one of the main driving forces behind the mango market.

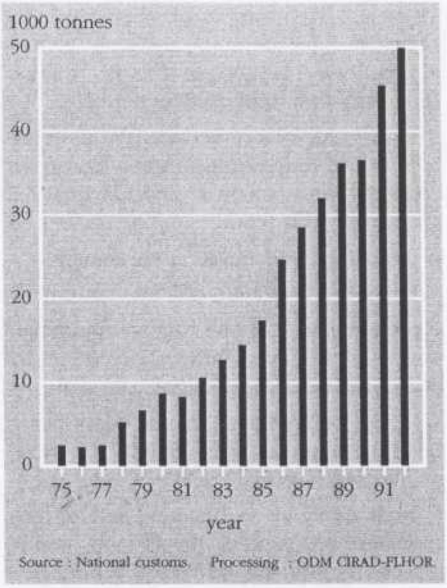


Figure 2
The EU mango import market since 1975.

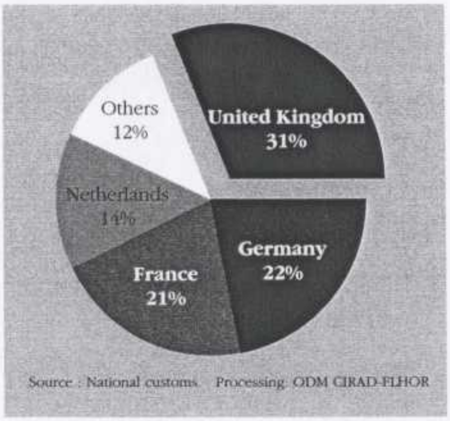


Figure 3
Main European mango importers in 1992.

mango producing countries and their market ranking

The EU, second for market volume after USA, is the most diversified market.

Most of the 90 classified mango producing countries (63 in 1992) supply less than 100 t of fruit for the European market. Brazil, Puerto Rico and South Africa are the only high volume exporters on this market.

Of the 26 main mango sources that supply the market (98% of yearly imports), 14 are from the Americas or the Caribbean, 8 are African and 4 Asian.

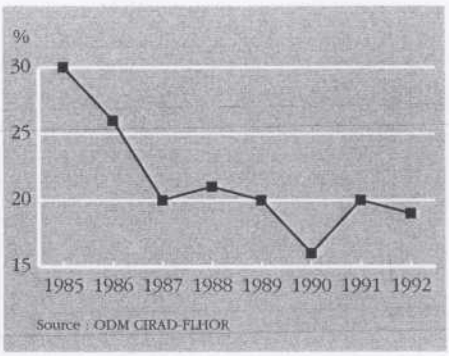


Figure 4
ACP market shares in the EU since 1985.

Market shares for mangos sourcing from ACP (Africa/Caribbean/Pacific) countries, bound to the EU by preferential trade agreements (Lomé IV), dropped by 11 points between 1985 and 1992 (Fig. 4). There was a short-lived reflation in 1991 for ACP countries, followed by a further decline in 1992 even though the mango market was developing rapidly.

There are six essential reasons why ACP countries have chronic problems in marketing their mangos on the EU market (generally their only solvent market):

– high competition between ACP countries at the time (spring) when European consumption is oriented towards seasonal local fruit;

– difficulties in controlling sea transport;

– landlocked situation of some countries;

– predominance of one variety (cv Amélie) which is not yet fully appreciated by consumers because of its green coulour;

– high competition with Caribbean, Central American and South American mango producers;

– great difficulty in breaking into British and German markets; the French market represents almost half of all ACP outlets.

supervised development

The world mango market has been developing steadily over the past 10 years. The EU market is the most diversified, with respect to countries of origin and varieties offered to the consumer. New markets such as Spain and Italy still have a high consumption potential. Some Asian and American producing countries are now highly competitive with ACP producing countries, as African mango exports decline.

African producers will have to adopt three development strategies in order stall further market decline: establish quality-based policies (transport, packaging), extend their supply of mangos to the European market over a longer period, and intensify their promotional campaign for mango products.

Appendix 1
Source : National customs.
** first four months*

A) USA mango imports between 1988 and 1993 (tonnes)

Year	Total	Mexico	Growth rate
1988	34 646	27 269	+ 34
1989	52 273	43 923	+ 16
1990	59 007	50 922	+ 56
1991	92 122	76 402	– 17
1992	76 165	68 254	
1993 *	20 245	17 243	

B) Canadian mango imports since 1991

Tonnes	1991	1992
Total	**13 796**	**12 782**
Mexico	8 418	8 048
USA	2 333	2 555
Brazil	425	368
Venezuela	510	327
Costa Rica	8	238
Peru	231	231
Philippines	156	187
Dominican Republic	60	112
Taiwan	117	95
Thailand	67	86

C) Japanese mango imports between 1989 and 1992

Tonnes	1989	1990	1991	1992
Total	**6 013**	**5 445**	**6 925**	**8 005**
Philippines	4 664	4 212	5 768	7 177
Mexico	1 206	1 158	1 036	734
China	32	26	35	38
Thailand	78	23	20	18
Taiwan	21	6	50	14