West African mango
A disappointing season in 2000

After a 1999 season that surprised observers by the quantities exported and the satisfactory results, that of 2000 seems to be much more mixed. Although much lower exports than in 1999 were forecast, the quantities delivered to the European market were finally much the same. The lack of information and reliable forecasting disturbed sales. Although the presence of West African mangoes on the European market has become confirmed in recent years in terms of volume, the economic results do not display the same pattern.

Quantities

The climatic conditions in the production zones (drought, strong winds, etc.) promised a 2000 season closer to that of 1998 (about 8 000 tonnes) than to 1999 (13 000 tonnes). In fact, performances were similar to those of the previous season. Côte d'Ivoire exported nearly 11 000 tonnes of mangoes, with 10 400 tonnes travelling by sea and the rest by air. Those leaving by sea consisted of 34 percent 'Amélie' and 66 percent coloured varieties ('Kent', 'Keitt', etc.). The exports from Mali, the second largest West African supplier of the European Union, totalled 1 160 tonnes by the end of June, with 360 tonnes travelling by sea. As in previous years, Burkina Faso formed a 'reserve' of fruits for exporters in Côte d'Ivoire and also shipped 175 tonnes of mangoes directly (145 tonnes by air and 30 tonnes by sea). Guinea is reported to have exported 670 tonnes of mangoes this year, a strong increase in comparison with 160 tonnes in 1999.

The rate of weekly arrivals by ship from Côte d'Ivoire was much more irregular in 2000 than in 1999, leading to considerable difficulties at the sales level. The number of vessels (OCAB) totalled 23 in 2000 against about 30 in 1999, resulting in irregular supplies with loads of 500 to 1 000 palettes instead of 400 to 500 in 1999. This logistics encouraged the storage of fruits and made sales more difficult, especially when the fruits received were 'soft'. The use of an apparently defective ship aggravated the problems of quality. The high proportion of 'Amélie' mangoes (34 percent of the total from Côte d'Ivoire), for which we know that there are sales difficulties during the transition to the coloured varieties, increased the congestion of the French market and pushed prices down. The period of coloured varieties thus began on a saturated, sluggish market with fruits whose condition varied from one shipment to the next.

The export data by destination country (source: OCAB) cover approximately 85 percent of the tonnages sold by Côte d'Ivoire. Thus, the French market took 47 percent of exports, followed by the Netherlands (30 percent), Germany and Spain (7 percent). The balance was divided among other markets such as the United Kingdom (4 percent), Portugal (3 percent) and Belgium (2 percent). These figures concern direct exports and do not include re-exports, in particular by French exporters. For Mali (source: CAE), France remained the main destination, accounting for 83 percent of the tonnages exported at the end of June. It was followed by the Netherlands (8 percent), Germany and the United Kingdom (3 percent) and Switzerland (2 percent).

Quality

In spite of satisfactory quality overall, the fruits exported during the 2000 season were not up to the standard observed in 1999. The climatic conditions during fruit growth (rainfall and wind) seem to have affected the appearance of the fruits, to judge by the many skin defects observed, such as rubbing, scratches and scars. Although they did not affect taste quality, these defects marred the presentation of the fruits.

Apart from these 'natural' defects, more marked quality problems were observed than during the previous season:

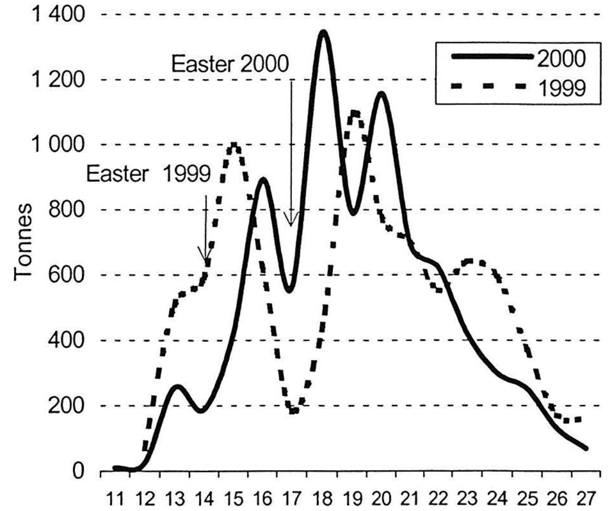
- random fruit ripening, causing problems for sales on markets outside France. This phenomenon calls into question the delicate fixing of the picking time and also the treatment conditions and the periods elapsing between the picking and loading of the fruits;

Mango - West Africa - EU imports

Tonnes	Season 1999		Season 2000		%
	By air	By sea	By air	By sea	
Côte d'Ivoire	300	10 800	400 *	10 400	=
	11 100		10 800		
Mali	736	200	800	630	+ 20
	936		1 160		
Burkina Faso	200	-	145	30	- 22
	200		175		
Guinea	160		670		+ 310
Senegal	80	470	-	-	-
	550		-		
Total	12 396		-		-

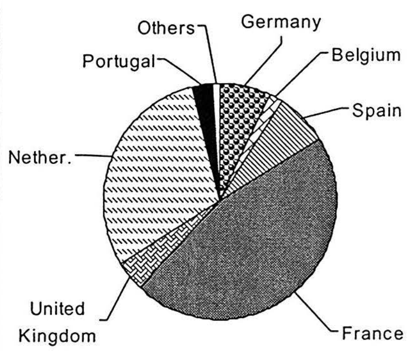
Note: *, more than... / Source: Coleacp

Mango - Côte d'Ivoire - EU imports



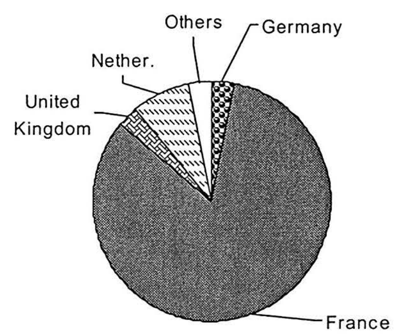
Source: OCAB / Processing: COLEACP

Côte d'Ivoire



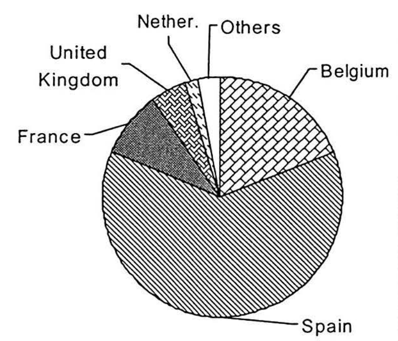
Source: OCAB

Mali



Source: CAE

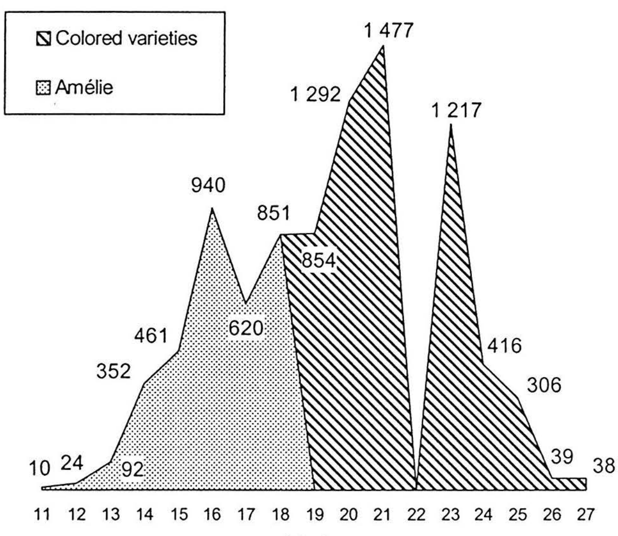
Guinea



Source: PCPEA

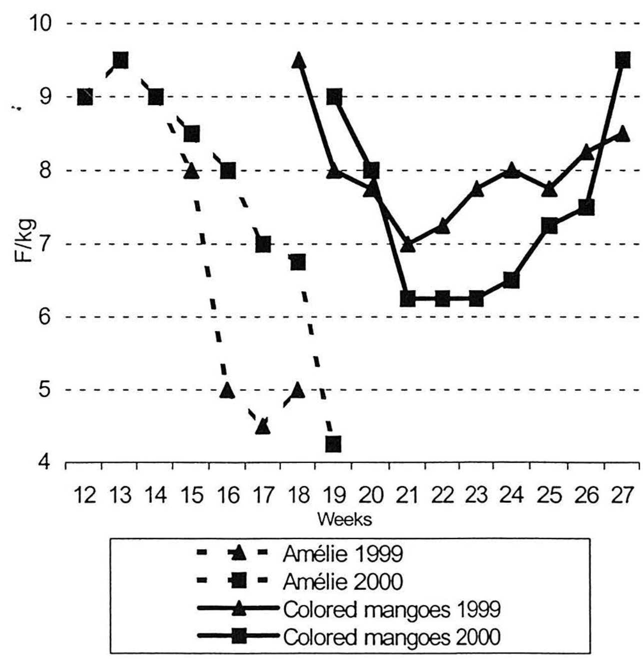
Mango - Côte d'Ivoire - EU supply - 2000

In tonnes



Source: OCAB

Mango - Import prices - France



Sources: OCAB, COLEACP

- incidents of the black spoilage type (a problem of storage temperature or fruit physiological disorder), mainly in the 'Amélie' variety at the end of the period, leading to numerous returns of fruits by buyers and finally the destruction of the goods;
- numerous cases of stem-end rot;
- uncertainty with regard to fruit quality at the arrival of each shipment, given the loading times and the availability of professionals (phytosanitary inspection) in European ports;
- an increase in fruit fly infestation from the beginning of the season. The first interceptions (air shipments) probably concerned 'compound mangoes' that are earlier and also more exposed to fruit fly. Some 100 to 150 tonnes was intercepted during the season. Control of this recurrent pest can only be performed at an overall scale. The only resources available for exporters are careful fruit sorting and the use of hot water treatments.

Apart from quality problems related to production conditions that it is difficult to address in the short term, some defects observed this year could have been avoided by more careful sorting and by better logistics. New, less experienced operators in the sector participated in the deterioration of overall fruit quality. If this were to continue, it might harm the image of West African mango exporting countries. Conversely, some commercial brands have succeeded in shipping fine quality fruits in spite of serious constraints.

Prices

The graph (see page 7) shows the French market price movement of Côte d'Ivoire mangoes transported by sea; this is shown by variety ('Amélie' and coloured varieties). These average prices are drawn from the weekly bulletins published by COLEACP. Although the fall in the price of 'Amélie' was slower in 2000 than in 1999 until week 17, it was more marked in subsequent weeks. In 2000, the downward trend was irremediable whereas 'Amélie' prices had tended to recover at the end of the season. Given the stocks of 'Amélie' that had accumulated at the end of the season in 2000, it can be considered that the prices actually recorded were lower than those of 1999.

The fact that there is no break between the 'Amélie' season and that of the coloured varieties, the congestion of the market with stocks of fast-ripening 'Amélie' and the increase in air shipments of coloured mangoes during this key period are all factors leading to lower starting prices in 2000 than in 1999 for the first 'Kent' fruits transported by sea. The size of arrivals and the irregularity of fruit quality in the face of sluggish demand brought prices down. They only recovered at the end of the season when the pressure of shipment volumes had decreased.

The prices of fruits from Mali appear to have been firmer than those of Côte d'Ivoire mangoes. It is true that the exports from this origin do not use the same distribution channels and the volumes are not comparable. Mali has strengthened its diversification role since last year. By choosing to ship coloured varieties (Valencia type) whereas most of supplies consist of 'Amélie', the country stood out and catered for specific but limited demand. Competition is direct and stronger in the second part of the season with the arrival of coloured varieties by air from the other countries of West Africa. In contrast, attempts at exporting by sea still suffer from irregularity and less competitiveness than more experienced origins.

The commercial context

Several observations concerning the context of the 2000 mango season go towards explaining the results observed:

- later finish of the South African and Peruvian mango seasons with produce frequently displaying irregular quality, leading to low prices;
- less dynamic overall demand than in 1999, especially from supermarket/hypermarket chains;
- earlier and stronger competition from Latin American origins than in the previous season (Guatemala, Costa Rica, Nicaragua and Venezuela and then Puerto Rico and Mexico);
- fast, substantial supplies of the season's fruits ■

After campaign monitoring by COLEACP
www.coleacp.org

Mango - EU imports by provenance

Tonnes	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
INTRA-EU incl. (*)	**4 211**	**6 551**	**6 945**	**8 599**	**10 732**	**13 524**	**17 471**	**24 648**	**35 581**	**45 861**	**46 057**	**58 940**
Netherlands	2 607	3 899	4 742	5 796	7 824	8 765	9 565	12 897	19 553	23 061	26 513	34 392
France	638	1 285	692	1 062	1 121	2 368	2 875	4 824	7 757	9 784	8 167	8 131
Belg.-Luxem.	641	922	913	1 251	759	803	1 566	2 677	3 054	5 993	4 790	6 870
Spain	25	44	5	23	17	343	696	875	1 316	3 381	3 068	4 971
Germany	151	295	184	137	298	676	1 408	2 031	2 697	2 213	2 243	2 438
United Kingdom	112	93	298	270	674	382	844	1 099	836	1 059	769	1 104
EXTRA-EU incl.	**27 368**	**30 234**	**31 678**	**39 518**	**42 494**	**43 979**	**49 087**	**63 718**	**68 761**	**75 938**	**84 532**	**116 318**
Brazil	3 839	3 755	4 402	5 739	7 646	10 000	9 059	13 687	13 887	9 174	24 475	38 407
Côte d'Ivoire	1 525	2 110	901	1 359	2 566	2 509	5 000	8 284	4 154	8 023	5 987	10 284
South Africa	1 266	1 806	1 710	2 076	4 124	3 649	5 279	6 203	5 402	6 590	8 215	9 897
United States	3 915	4 524	6 745	5 819	5 190	5 071	4 871	5 998	7 825	10 164	8 448	9 843
Israel	442	1 148	1 174	2 595	2 513	2 997	3 331	3 656	4 657	5 638	7 463	8 924
Peru	1 763	1 413	1 497	1 597	1 591	2 135	894	2 912	4 828	5 854	1 813	7 348
Mexico	2 589	3 145	2 207	2 935	3 087	2 900	3 409	4 984	6 742	5 868	8 482	5 660
Pakistan	1 382	1 190	1 515	1 827	2 227	2 518	3 304	2 859	2 850	4 479	4 492	5 609
Ecuador	83	289	145	54	8	140	705	1 220	3 590	639	1 548	3 981
Costa Rica	484	895	981	1 915	1 163	925	1 810	1 904	2 927	3 276	2 105	3 333
Venezuela	3 188	2 903	2 947	3 190	3 216	2 989	3 020	4 132	4 161	6 636	3 384	3 183
India	931	895	866	957	1 103	1 159	1 265	1 203	1 061	1 097	1 108	2 132
Guatemala	217	274	70	826	944	770	640	423	624	792	1 040	1 032
Mali	1 246	1 507	1 179	2 144	1 170	1 007	835	756	709	1 448	1 006	818
Zimbabwe	2	0	0	2	18	3	12	22	346	710	487	781
Gambia	103	169	249	467	462	485	612	428	717	496	490	724
Senegal	26	42	24	34	7	24	29	82	86	124	280	679
Honduras	4	5	5	77	107	139	206	145	516	510	529	590
Jamaica	659	278	490	1 261	966	811	690	987	482	588	334	419
Thailand	197	176	148	104	169	146	290	358	288	299	347	367
Dominican Republic	6	17	8	16	48	54	142	94	226	334	345	333
Cuba	4	9	0	0	18	0	13	7	69	56	73	230
Philippines	119	87	121	77	78	71	29	70	107	77	69	217
Burkina Faso	732	848	1 015	951	1 233	897	734	491	293	868	161	189
Egypt	56	63	55	73	70	67	42	69	47	72	53	158
Guinea	342	554	153	374	398	647	457	220	196	433	483	155
Indonesia	97	99	136	118	120	96	193	123	144	125	144	119
Colombia	27	79	117	222	307	288	332	114	89	26	313	113
Cameroon	1	1	18	4	2	7	7	25	43	35	87	95
St. Lucia	400	261	301	451	485	310	494	299	211	133	124	76
Kenya	867	610	904	398	448	174	229	156	305	397	71	75
Australia	3	2	20	9	12	22	27	22	57	74	110	67
Vietnam	7	11	19	66	74	51	33	62	103	92	71	61
Iran	0	5	0	0	0	0	1	2	1	0	0	60
Grenada	50	87	162	173	129	203	131	123	138	31	75	50
Surinam	3	6	11	4	53	33	46	41	14	27	54	46
Ghana	84	68	34	19	77	89	51	64	11	28	40	42
Nigeria	78	56	9	12	8	9	10	81	31	104	18	37
Laos	0	0	0	0	0	0	0	0	0	0	0	31
Belize	0	6	11	441	41	0	2	24	389	34	11	24
Malaysia	9	9	7	21	16	58	21	19	17	4	8	23
Bangladesh	1	0	7	1	1	3	0	0	4	6	6	17
Togo	4	9	6	10	13	11	8	6	12	19	9	11
Chile	22	14	12	0	53	34	2	6	57	4	1	11
Argentina	10	0	31	9	1	0	0	19	0	19	34	8
Dominica	6	0	2	0	2	9	10	18	18	8	4	7
Mauritius	3	4	16	7	12	5	2	1	0	6	1	7
Sri Lanka	8	4	3	10	34	20	8	13	16	25	8	5
Barbados	4	2	2	1	0	0	5	1	14	0	6	5
Bolivia	0	0	0	0	0	0	2	0	0	2	1	5
Sudan	78	11	21	36	51	94	4	28	20	0	9	3
Not determined	0	0	0	0	0	98	445	647	56	5	7	3
Saint-Vincent	24	0	0	0	0	0	1	12	22	1	1	3
Guinea-Bissau	2	29	76	156	35	17	41	54	0	53	24	0
Nicaragua	75	498	306	596	270	47	0	331	100	395	6	0

Notes: * - Consignments shipped from one EU member country to another / EU-15 from 1995 onwards

Source: Eurostat

Mango - EU-15 - Extra-community imports

Tonnes	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
TOTAL incl.	**27 368**	**30 234**	**31 678**	**39 518**	**42 494**	**43 979**	**49 087**	**63 718**	**68 761**	**75 938**	**84 532**	**116 318**
Netherlands	5 241	5 994	8 344	8 902	12 937	17 349	19 286	25 575	30 222	30 611	42 066	59 445
France	6 441	8 018	7 290	9 240	9 874	9 593	10 325	14 871	13 014	17 176	16 010	21 615
United Kingdom	9 973	10 178	9 955	13 033	12 221	10 627	11 181	12 241	11 777	13 553	13 792	17 956
Belg.-Luxem.	1 116	1 633	1 325	1 698	1 515	1 200	1 876	4 645	7 640	9 765	7 012	9 276
Spain	72	56	102	248	286	250	890	835	1 175	1 040	2 059	3 873
Portugal	573	584	844	1 329	1 677	1 681	1 744	1 810	1 887	1 387	1 117	1 892
Germany	3 087	2 951	3 121	4 263	3 316	2 560	3 097	3 139	2 421	1 835	1 954	1 747
Italy	654	641	579	599	553	344	299	175	148	216	152	165
Denmark	160	130	80	177	87	291	345	245	140	142	126	144
Sweden								52	57	89	98	101
Austria *								90	132	60	103	51
Greece	51	47	31	28	27	47	44	36	87	57	39	39
Finland *								2	45	7	4	14
Ireland	0	2	7	1	1	37	0	2	16	0	0	0

Note: * - EU-15 from 1995 onwards

Source: Eurostat