



Market brief, 2005



**MARKET BRIEF FOR MANGO EXPORT
IN THE UNITED KINGDOM**



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Target Users

Target users for the market brief on mangoes from Ghana are the following:

1. Exporters of mangoes

2. Product Associations in the Mangoes Industry

Horticulturist Association of Ghana,
Sea-Freight Pineapple Exporters of Ghana,
Mangoes and Papaya Associations.

3. The Research Institutions and Universities

University of Ghana,
Kwame Nkrumah University of Science and Technology,
University of Cape Coast,
Council of Scientific and Industrial Research,
Cocoa Research Institute, Ghana

4. Ghana Trade Missions Abroad

London
Washington D.C
Brussels
Geneva

5. Ghana Embassies Abroad

All Ghana Missions

6. Importers

Buyers of Ghana's mangoes

7. Foreign Embassies In Ghana

Commercial Sections of Embassies in Ghana

8. Chambers of Commerce

Chambers of Commerce of importing countries

9. Export Service Providers

Ghana Shippers Council
Ghana Institute of Freight Forwarders

10. Financial Institutions

Export Development and Investment Fund
All Ghanaian Banks
Insurance Companies

PURPOSE

To provide users with a concise overview of conditions for market entry and trends in the U.K market of mangoes.

The main objective is to increase Ghana's market share of mangoes in the U.K market.



PRODUCT

Mangoes - HS 080450

Varieties

Mango varieties grown in Ghana include Kent, Keitt, Palmer, Haden, Tommy Atkins, Irwin, Sensation, Julie, the local variety.

Below are some of the most popular and exportable mangoes in Ghana.

KENT	KENT MANGO Developed in Florida in 1944. Direct descendant of the Brooks cultivar, derived from the Sandersha seedling. The fruit is a regular oval shape, large 500-700g, with plump cheeks, greenish-yellow color with red shoulder. Very rich and sweet with fiber-free flesh like butter when ripe. A softer mango that really should not be put to the squeeze test. Highly susceptible to anthracnose and also sensitive to cold.
TOMMY ATKINS	TOMMY ATKINS MANGO Developed in Florida in the early 1920's. Mango cultivar developed and grown for commercial export. The fruit is a regular oval, medium to large sized, 300to650g, yellowish-orange with deep red to purple blush, thicker skinned, juicy but firm with medium fiber. Susceptibility to anthracnose is low as compared with the other exportable varieties.
HADEN	HADEN MANGO Developed by Captain Haden 1910 in Florida. Originated from Mulgoba seedling, Bombay, India. The fruit is a regular oval, large, 500-650g, yellow almost entirely washed over with an orange-red color, mild in flavor with a small amount of fiber. Highly susceptible to anthracnose and also highly sensitive to cold.
KEITT	KEITT Indian strain thought to have originated, like the Haden, from a seedling of Mulgoba 1945, Homestead, Florida. The fruit is a large (400-800g.) ovate tapering with slight nose-like protuberance above its tip. Green to orange-yellow as it ripens; firm flesh with a piney sweetness and minimal fiber surrounding the seed area. A late fruiting mango, often available in fall.



USES

1. For the manufacture of mango juice
2. For the preparation of fruit salads
3. Dried and consumed in the dry form,
4. As mango concentrate
5. Whole fresh mango
6. Local variety exported green to UK and used as pickle

Packaging

The mango fruits from Ghana are graded and packaged in 5kg telescopic cartons, in counts of 6-12 per box with each fruit in a compartment.

Shelf-life

Has shelf-life of between 10-21 days depending on the variety.

Nutritive Value of Mango

Dietary value, per 100 gram edible portion

	Mango
Water (%)	80
Calories	63
Protein (%)	0.4
Fat (%)	0.4
Carbohydrates (%)	16
Crude Fiber (%)	1.0
	% of US RDA*
Vitamin A	20
Thiamin, B1	3.6
Riboflavin, B2	2.5
Niacin	2.2
Vitamin C	200
Calcium	1.1
Phosphorus	1.5
Iron	4.0
Sodium	---
Potassium	---

World Production of Mangoes and their Percentage Contribution

Top 10 countries (% of world production)	
1. India (44%)	6. Philippines (3%)



2. China (13%)	7. Indonesia (3%)
3. Thailand (6%)	8. Nigeria (3%)
4. Mexico (5%)	9. Brazil (2%)
5. Pakistan (4%)	10. Egypt (1%)

Ghana's Mango Export Performance

Ghana's total mango exports in 2003 are 157mt valued at \$ 568,000. These exports were made between May and August being the main seasons from Ghana's exportable varieties.

Seasonal availability of Ghana's mangoes (state the seasons for other competitors and state those that compete with Ghana during the lean season- mention the minor season Dec-Jan)

Destinations of Ghana's Mango

These were exported to the following countries;

Switzerland

U.K

Lebanon

Italy

Germany

UAE

Major exporters from Ghana include Gannat Farms Ltd, Tacks Farms Ltd, Prudent Exports Ltd, John Lawrence Farms Ltd, Missions Farms Ltd and Lartey Associates.

WORLD EXPORTS

11.1million Tons of mangoes valued at \$6.5 billion was exported world wide in 2003.

List of importers for the selected product in 2003

Product : 080450 Guavas, mangoes and mangosteens, fresh or dried



Importers	Value imported in 2003, in US\$ thousand	Quantity imported in 2003	Quantity unit	Unit value (US\$/unit)	Annual growth in value 1999-2003, %	Annual growth in quantity 1999-2003, %	Annual growth in value 2002-2003, %	Share in world imports, %
World estimation	758,375	920,390	Tons	824	8	9	29	100
United States of America	209,090	282,360	Tons	741	6	6	7	28
Netherlands	86,085	69,646	Tons	1,236	6	3	67	11
France	58,298	32,200	Tons	1,810	12	1	90	8
Hong Kong (SARC)	44,566	61,448	Tons	725	1	10	-15	6
United Kingdom	39,828	31,964	Tons	1,246	9	8	52	5
Germany	36,966	31,937	Tons	1,157	3	4	23	5



Destinations of the World Major Exporting Countries

Exporting Countries	Destinations
Mexico	USA, Canada, France, Netherlands
India	Saudi Arabia, United Arab Emirates, and Netherlands etc
Brazil	USA, UK, Canada, and Portugal
Netherlands	Germany, UK, France and Switzerland

List of importing markets for a product exported by Ghana in 2003

Product : 080450 Guavas, mangoes, and mangosteens, fresh or dried

Ghana's exports represents 0% of world exports for this product, it's ranking in world's export is 42.

Ghana has not reported trade data in the COMTRADE database. Therefore, figures are based on data from importing countries.

Importers	Exported value 2003 in US\$ thousand	Share in Ghana's exports, %	Exported quantity 2003	Quantity unit	Unit value (US\$/unit)	Export trend in value 1999-2003, %, p.a.	Export trend in quantity 1999-2003, %, p.a.	Export growth in value 2002-2003, %, p.a.	Ranking of partner countries in world imports	Share of partner countries in world imports, %	Total import growth in value of partner countries between 1999-2003, %, p.a.
Total	568	100	157	Tons	3,618	58	18	95			8
Switzerland	293	52	37	Tons	7,919	239	145	57	16	1	21
United Kingdom	101	18	13	Tons	7,769	42	-1	1022	5	5	9
Lebanon	59	10	41	Tons	1,439	50	63	119	32	0	-7
Netherlands	58	10	31	Tons	1,871	7	2	123	2	11	6
Luxembourg	52	9	32	Tons	1,625			300			

MARKET SITUATION AND TRENDS

Mango imports into the countries of European Community have increased significantly in recent years. This applies not only to the traditional importers of mangoes, namely the United Kingdom, France, and the Netherlands, but also especially to Germany, where this fruit was still relatively unknown at the beginning of the 1980s. There is every indication that the growth trends in these markets will continue during the next decade as a result of the health consciousness of consumers.

Two principal limiting factors for sales of mangoes in these markets are the prices and their seasonal fluctuations.

The future developments of sales will depend in large measure on the extent to which it proves possible to achieve an optimum price/quality relationship and maintain it all year round.



Countries that supply fresh mangoes during the winter months have good prospects, since they can at least partially fill in the gap created by lack of domestically grown fruit in Europe during that time of the year.

The number-one prerequisite for successful long term sales, however, is and remains the ability to supply top quality fruit. Highest priority must therefore be attached to quality control at all phases to the supply chain.

United Kingdom

Ghana's total mango exports to the UK market in 2003 is 13 tons valued at \$101,000

Characteristics of the U.K Market

U.K. is the largest market for mangoes in Europe with France, Germany and Netherlands emerging as important markets.

The emerging trend is that the percentage of mangoes going to the supermarkets is on the increase and will continue to do so for sometime to come. An important feature of the fruits supplied to the supermarkets is value addition, in response to rapid unwillingness or loss of interest of the average English housewife to prepare meals, using unprocessed or raw agricultural produce. The preferred choice is sliced mangoes as against whole raw ones. Another emerging feature of the U.K market is the increasing preference for smaller fruit sizes, even for those who will purchase unsliced fruits. The U.K government has initiated a policy of supplying fruits to pupils in schools as a means of discouraging the consumption of sweets and sugary pastries.

This has increased the demand for smaller mangoes, which do not need to be sliced into pieces for distribution.

Currently, small sized mangoes and bananas are supplied mainly from South America. This means that Ghana's local mangoes which are small in sizes could also be exported to meet the growing demand for small fruits.

Distribution Channels

Ghana's mangoes get to our main markets and consumers by air through:

a. Importer/ Distributors

The mangoes are airlifted directly to the shops or wholesale of importer or distributors.

b. Through Retailers

Exporting companies export direct to some retail shops for sale to consumers

MARKET ACCESS

Standard or Quality for Mangoes

Provision Concerning Quality

The quality requirements for mangoes are the following;

- a. Minimum Requirements
The mangoes must be;
 - intact, firm and fresh in appearance



- sound, produce affected by rot or deterioration such as to make it unfit for human consumption is excluded
- clean, practically free from any visible foreign matter
- free from black stains or trails which extend under the skin
- free from pests and practically from damage caused by pests
- free from damage caused by low temperature
- free to any abnormal external moisture
- free of any foreign smell and taste.

Sizing

Size is determined by the weight of the fruit. Mangoes are sized according to the following weights.

Size Group	Weight in Grammes	Size Difference in grammes
A	200-350	75
B	351-550	100
C	551-800	125

The minimum weight of mangoes must not be less than 200g.

Packaging and Presentation

a. Uniformity

The contents of each package must be uniform and contain only mangoes of the same origin, variety, quality and size.

The visible part of the contents of the package must be representative of the entire content.

b. Packaging

Mangoes must be packed in such a way as to protect the produce properly.

The materials used inside the package must be new, clean and of a quality such as to avoid causing any external or internal damage to the produce. The use of materials and particularly paper or stamps bearing trade specifications, is allowed provided that the printing or labeling has been done with non-toxic ink or glue. Packaging must be free from all foreign matter

c. Marking

Each package must bear the following particulars, in letters grouped on the same side, legibly and indelibly marked, and visible from the outside.

d. Identification

Packer and / or Name and address or officially dispatcher issued or accepted code mark

e. Nature of the produce

“Mangoes”, if the contents are not visible from the outside

Name of local places name

f. Origin of the produce

Country of origin and, optionally, district where growth or national regional or local place name

g. Commercial specification

- Class
- Size expressed in minimum and maximum weight
- Number of fruits



TARIFFS

Importer, **United Kingdom** applies the MFN of 0% tariff on mangoes. Ghana is also a member of the ACP Nations Group and therefore enjoys 0% tariff on the U.K market.

Commercial practices

Mangoes are traded on FOB or CIF basis subject to agreement between the parties. Payment is usually cash against document by letter of credit (L/C) both confirmed and irrevocable is used with certain origins.

PRICES

The MNS of the ITC collects information from a network of correspondents worldwide in order to provide timely and detailed price and market information on various products including mangoes. MNS is available on ITC's product map market intelligence platform on <http://www.p-map.org>

Mango price in the UK market for the year 2003 are shown below

Market Origin	Price (\$) per kilo	
	Low	High
Brazil	1.47	1.83
Costa Rica	1.83	1.83
Guatemala	1.33	1.33

PROMOTING GHANA'S MANGOES

Ghana's mangoes are promoted through the following means:

1. Participation in major international trade fairs such as Fruit Logistica in Germany, SIAL in France, Anuga in Germany and AGF TOTAL in The Netherlands. The Ghana Export Promotion Council normally coordinates Ghanaian exporters to these fairs where fresh mangoes from the various varieties (Keitt, Kent, Palmer, Haden etc) are displayed together with their brochures at Ghana's stand.
2. Development of Product Profiles and Brochures. Profiles and brochures are available on request and also on GEPC website.

Below are contacts for useful trade fairs and exhibitions for mango.

1. Fruit Logistica
Berlin 2-4th Feb. 2006
International Trade Fair for Fruits and Vegetable Marketing Division
Messe Berlin GmbH
Division of Trade fairs and exhibitions
Messedamm 22
D - 14055 Berlin
Telephone: +49 (0)30 3038-0
Facsimile: +49 (0)30 3038-2325
central@messe-berlin.de



2. Anuga
Trade Fair for Food & Beverages
October 8 - 12, 2005
Sandra Griese
Direct Marketing Manager
Food Division
Phone: +49 221 821-2700
Fax: +49 221 821-99 1010
anuga@visitor.koelnmesse

3. SIAL
SIAL - Customer Service
1 Rue du Parc
92 593 LEVALLOIS-PERRET FRANCE
Tel : +33 (0)1 49 68 54 98
Fax : +33 (0)1 49 68 56 32

4. AGF TOTAAL
Visiting address: Ahoy' Rotterdam nv
Ahoy'-weg 10
3084 BA Rotterdam, the Netherlands
Postal address: P.O. Box 5106
3008 AC Rotterdam, the Netherlands
Telephone: +31 10 293 33 00
Fax: +31 10 293 33 99
Website: www.ahoy.nl

Useful Addresses and Links

Horticulturists Association of Ghana (HAG)
Box 5233
Accra-North, Ghana
Tel: 233-21-773860
Fax: 233-21-773861

Seafreight Pineapple Exporters of
Ghana (SPEG)
Box 5196
Accra-North
Ghana
Tel: 233-21-244358
Fax: 233-21-244357

Federation of Association of Ghanaian Exporters
(FAGE)
P. O. Box M124, Accra, Ghana
Tel: 233-21-232554
Fax: 233-21-22038
E-mail: fage@ighmail.com

Papaya and Mango Producers and Exporters Association
of Ghana (PAMPEAG)



Tel: +233-244-296895

Importer
Utopia U.K
Fax: +44 1775716808
E-mail: LHOOK@autopiauk.com

SOURCES

www.p-map.org

www.macmap.org

Market News Service (MNS)

Ghana's Trade Counsellor in the U.K

