



Promising EU export markets for dried mangoes

Dried mangoes are eaten in slices as a snack (whole or mixed) or are used in the food processing industry, mainly in breakfast cereals and in energy bars, which are most popular in the UK, the largest EU market.



Mango slices

The awareness of dried mangoes as a snack is still very low in the other EU countries, which accounted for only 1% of all imported dried fruit. The future dried mango market will be driven by more availability throughout the year. Dried mangoes that are less sweet and have a stronger taste are expected to become more popular. This implies good opportunities for West African exporters.

This module gives an overview of:

1. Consumption of dried mangoes
2. Main importing markets in Europe
3. EU dried fruit imports and share of dried mangoes
4. The most promising EU export markets

In this study, the focus will be on the following uses of dried mangoes:

- *As a healthy snack.* Dried mango slices that are sold in plastic bags or pouches and are eaten as a healthy substitute for sweets, chocolate or crisps. This is still a small share of the market and the habit of eating dried mangoes as a snack is unknown. Compared to other dried fruit, they are relatively high in price.
- *As an ingredient.* Dried mango slices, chunks, diced pieces or granules that are mainly used as a healthy ingredient in the food processing industry – as a substitute for sugar and as a healthy seasoning – in breakfast cereals, snack/energy bars and bakery products. Dried mangoes are also used in home cooking. They are sold loose (by weight) in plastic boxes.

There are three types: sweetened dried mangoes, conventional dried mangoes and natural dried mangoes, which are covered in detail in the Module 'Product characteristics for dried mangoes'.

1. Consumption of dried mangoes

Since 2005, imports of dried mangoes were more or less unchanged and decreased during the early recession period in 2009/2010. On the other hand, there is evidence that the consumption of dried mangoes increases along with their availability. There is also a trend to reduce the waste of rejected mangoes for export markets and to increase the production of dried and processed mangoes for local, regional or international markets. As they can be stored longer, they are less dependent on the mango seasons and are therefore an ideal product to export for West African

exporters along with fresh mangoes. This helps to maintain a relationship with buyers throughout the entire year.

- **World consumption**

Major importers and consumers of dried mangoes are South-East Asia, USA, UK, Canada, Australia, UAE, Saudi Arabia, Kuwait and Latin American countries. Other large consuming countries are India, Pakistan, Thailand, Philippines, Brazil and Zimbabwe, which are also the leading producers and exporters of dried mangoes.

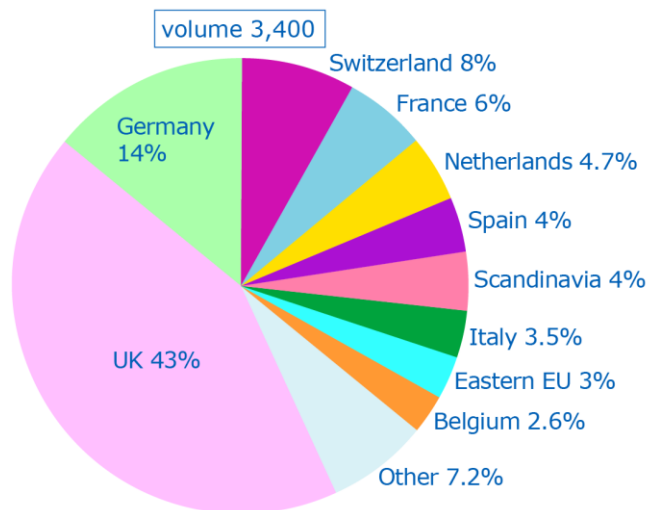
- **EU consumption**

Dried mangoes are part of the statistical CN code 08045000, which mainly concerns fresh mangoes with dried mangoes not further specified. An indication of dried mango consumption in the EU can be obtained from EU imports, which was estimated at 3,400 tonnes in 2012. This is the equivalent of 51,000 tonnes of fresh mangoes as it takes around 15 tons of fresh mangoes to make 1 tonne of dried mangoes.

2. Main importing countries in Europe

Compared to, Asia, USA and the Middle East, consumers in most EU countries are not familiar with dried mangoes. The UK is the main market in the EU because of their use in breakfast cereals or energy bars and because UK people, including the ethnic population, are more familiar with eating dried mangoes as a snack.

**Figure 1 EU imports of dried mangoes, 2012
as percent of volume in 1,000 tonnes**



source: Trade estimates (2014)

- **The UK** represented 41% of dried mango imports in the EU with an estimated 1,480 tonnes in 2012. Between 10-20% of this are either organic and/or Fair-trade dried mangoes. Most dried mangoes come from South Africa, Kenya and Ghana.
- **Germany** imported 476 tonnes of dried mangoes in 2012, which is still small - while Germany traditionally is the largest EU market for "organic" products. Germany is a large re-exporter and the largest EU importer of dried fruit - see table 1. Therefore, Germany can be a potential market for dried mangoes for West African exporters if a substantial improvement in their quality is achieved.
- **The French** market is also smaller than the UK market. France imported around 200 tonnes of dried mangoes. The awareness of dried mangoes is low in France.

Most of them are sweet and come from Asia (Thailand, Philippines) or South Africa, while most organic dried mangoes come from Burkina Faso. Dried mangoes are also sold as cubes/slices in mixed dried fruit packs.

- **Italian and Spanish** imports of dried mangoes were limited (see figure 1) with Spain producing their own (dried) mangoes. Besides, both countries produce dried fruit such as apricots, prunes and apples. The majority of dried mango slices come from South Africa or Asia.
- **Dutch and Belgian imports are relatively high.** In 2012, the Netherlands imported 160 tonnes and Belgium imported around 90 tonnes of dried mangoes. As with fresh mangoes, the Netherlands is an important re-exporter of dried mangoes, with some large packers that mainly supply Germany and to a lesser extent Scandinavian and other EU countries.
- **Scandinavian countries** between them imported 136 tonnes of dried mangoes, while **Eastern EU** imports, led by Poland, were estimated at 100 tonnes in 2012.
- **Switzerland** imported around 275 tonnes of dried mangoes of which between 10 - 30% were organic and/or Fair-trade. Dried mangoes are sold by Migros and Coop, which are large retail chains in Switzerland. Coop sells organic dried mangoes from Burkina Faso. HPW is a well-known Swiss-owned company exporting Fair trade dried mangoes from Ghana (www.hpwapg.ch).



Dried mangoes from the Philippines

A rough indication of dried mango imports can be also derived from the statistics that are given in the module 'Promising EU export markets for fresh mangoes'

3. EU dried fruit imports and share of dried mangoes

EU imports of dried mangoes still average around 1% of the total EU imports of dried fruit. In 2012, EU imports of dried (tree) fruit were 251,100 tonnes. This excludes vine fruit (sultanas, currants, raisins), dates and figs that usually account for 65% of all EU dried fruit imports (tree and vine), which was 624,350 tonnes in 2012.

The UK is the second largest EU importer of dried fruit (38,394 tonnes in 2012) with a rather high share of dried mangoes in all dried fruit – see table 1. Firstly, dried mangoes are used in cereals, which is the most popular breakfast in the UK. Secondly, dried mangoes are eaten in slices or in thin crisps as a healthy snack at home, on-the-go, at the office or at the fitness centre. UK imports of dried fruit are expected to rise further to 43,560 tonnes in 2013.



Dried fruit crisps (Nimms)

Germany is the largest importer of dried fruit and imported around 44,921 tonnes in 2012, an average annual increase of 1.8% since 2008. The food processing industry is the largest in the EU with dried fruit used in breakfast cereals, energy bars, dairy products, bakery products and (chocolate) confectionery. Germany is also the largest organic food market in the EU. The share of dried mangoes was just 1.0%, but growth is expected along with further growth in the German dried fruit market. In 2013, imports of dried fruit rose further to 48,930 tonnes. In addition, dried mangoes are increasingly available from online sellers.

France accounted for one third of the volume of UK dried fruit imports, i.e. 16,372 tonnes compared to 43,560 tonnes. The share of dried mangoes was estimated at 1.2% in 2012. Dried mangoes are sold as a snack in small bags and are sold loose in plastic boxes to be used in home cooking (bakery, yoghurts, desserts). Dried mangoes can be found in higher end greengrocers and organic shops next to other dried fruits. In this respect, there is competition with locally produced dried prunes, apricots, grapes, apples and pears.

Table 1 – Imports of dried fruit and dried mangoes, 2013
Volume in tonnes

	Dried fruit	Dried mango	share dried mango/dried fruit
UK	43,560	1,480	3.1%
Germany	48,390	476	1.0%
France	16,372	200	1.2%
Spain	20,258	130	0.6%
Italy	16,578	120	0.7%
Scandinavia	16,269	136	0.8%
Netherlands	16,128	160	1.0%
Belgium	6,443	90	1.4%
Eastern EU	34,871	102	0.3%
Switzerland	na	275	na

Source: ITC Trademaps, trade estimates (2014)

Even though **Spain and Italy** are dried fruit producing countries, they are sizeable importers of dried fruit as well. Figs, sultanas and apricots are used in Spanish and Mediterranean dishes. They are also eaten as a sweet coated in chocolate, which could be an opportunity for dried mangoes. In Italy, innovative ideas and new recipes using dried fruit - including dried mangoes - have emerged in Italian cuisine. Nevertheless, the existence of dried mangoes is still relatively unknown, which explains the low share in both countries (table 1).

In Scandinavian countries, consumption of dried mangoes is expected to grow along with the popularity of all dried fruit. Between 2009 and 2013, Swedish dried fruit imports rose from 5,822 to 7,158 tonnes, Danish dried fruit imports rose from 4,634 to 5,164 tonnes, while Finnish dried fruit imports rose from 3,177 to 3,947 tonnes. Some dried fruit is used in breakfast cereals, which are also popular in Scandinavia.

In Eastern EU countries, a similar trend is expected - albeit at a slower rate - as dried mangoes are higher in price than prunes and apricots, which take up the largest proportion of Eastern EU imports. Poland has become the 4th largest EU importer of dried fruit. Between 2009 and 2013 imports rose from 11,529 to 16,958 tonnes. Romania, Bulgaria and the Czech Republic showed similar increases and together imported 17,913 tonnes of dried fruit in 2013.

Dynamics in dried fruit

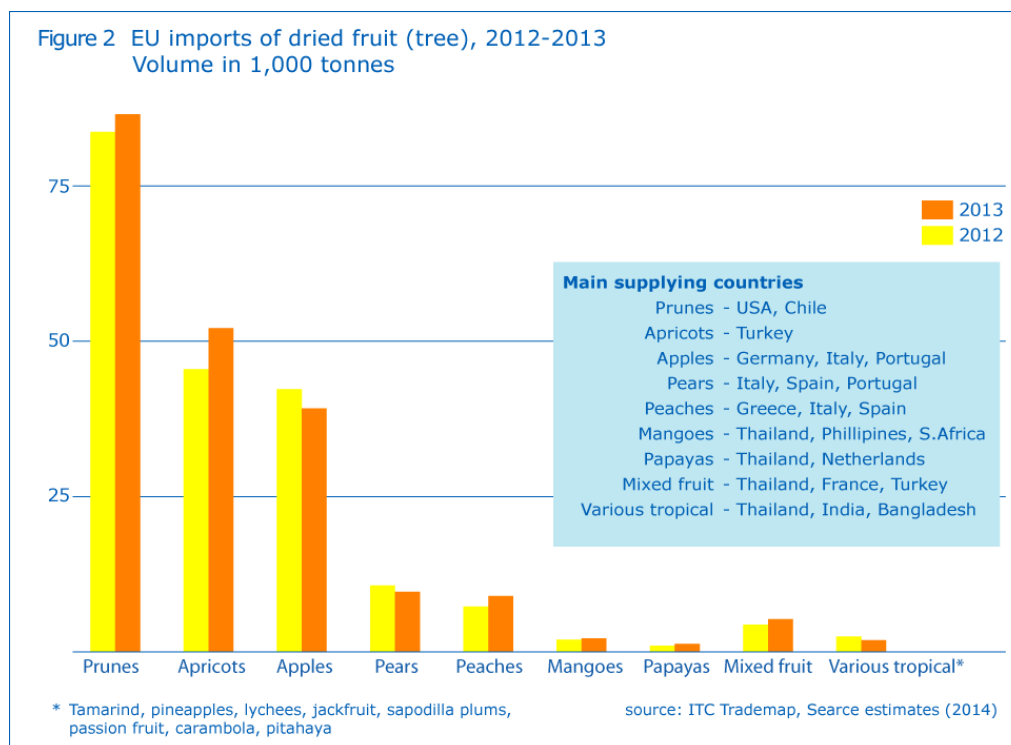
The dynamics in dried fruit also has an impact on dried mangoes. Dried fruit sales were down in the period 2010-2012, which was largely attributed to the recession. The majority of EU consumers bought dried fruit less frequently, or cut down on dried fruit; especially tropical dried fruit such as dried mangoes, physalis or pineapples, which are more expensive than the more popular prunes or apricots.

On the positive side, the following shifts have taken place recently:

- There is more demand for (mixed) tropical fruits and exotic fruits, especially since 2012. These mixes include dried mangoes as well.
- More demand for processed dried fruit 'snacks' as an alternative to sugared snacks.
- Increasing segmentation with creation of health conscious consumers, busy on-the-go consumers, obese consumers on a diet, sports enthusiasts, schoolchildren or vegetarians – see module 'Trade channels and market segments'.
- Shift away from use of added sugar, hydrogenated fats, artificial colours, preservatives to natural or artisanal dried fruit. This implies a good opportunity for natural dried mangoes.
- More use of dried fruit in home cooking (e.g. exotic cuisine) and more use of dried fruit in cereals as a healthy ingredient.



Healthy dried fruits



EU imports of most dried fruit picked up between 2012 and 2013:

- Dried prunes rose by 3.3% (from 83,700 to 86,514 tonnes) – see figure 2.
- Dried apricots rose by 14.5% (from 45,500 to 52,170 tonnes).
- Dried peaches rose by 26.5% (from 7,395 to 9,355 tonnes).
- Dried mangoes rose by an estimated 10.0% (from 2,000 to 2,200 tonnes).
- Dried papayas rose by 31.7% (from 1,000 to 1,317 tonnes).
- Mixed dried fruit rose by 19.0% (from 4,470 to 5,320 tonnes) mainly being mixed fruit with prunes.

On the other hand, EU imports of dried apples and pears were down and the product group 'various tropical' (tamarind, lychees or jackfruit) decreased by 30.1% (from 2,538 to 1,950 tonnes).

The main supplying countries for all dried fruit are Thailand, an important supplier of tropical dried fruit including dried mangoes (see figure 1), as well as the USA and Chile, which supply the majority of prunes. Nearby supplying countries of dried fruit include Turkey and most of the southern EU countries.

A comparison of dried fruit prices is given in the module 'Product and country competitiveness'

4. The most promising EU export markets

The most promising export markets are:

- **France and Germany** that are slowly increasing their direct imports of fresh mangoes from West Africa and where you can offer dried mangoes to importers as well. Germany is the largest importer of dried fruit and a large re-exporter. It also has the largest food processing industry. Dried mangoes are still unknown in both Germany and France, and in France the organic market continues to grow rapidly. To a certain extent, this also applies to Italy, Spain, Scandinavia and the Eastern EU countries.
- **Belgium and the Netherlands** that are both large importers of fresh mangoes from West Africa and there are large processors for dried fruit and nuts and for cereals.
- **The UK**, which remains the largest EU market, there may be an opportunity for West African exporters to introduce natural dried mangoes that have a stronger taste and are less sweet than the majority of imported (conventional) dried mangoes from Asia or South Africa.

This survey was compiled for CBI by **Searce**

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