



Mango Agribusiness Research Program

Session 5: Regional Mango Study - Update

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Information
Markets
Biosecurity
Quality






Regional Overview

To better understand & identify strategic industry & market development issues. Research gaps & opportunities for mango with potential to significantly increase smallholder incomes & livelihoods at the regional & country-level in the Asia-Pacific region.

Objectives:

1. Improve understanding of regional & country-level mango production, market situation, trends & spatial trade flows
2. Identify country-level areas of comparative, competitive advantage & opportunity for mango production, industry & market development
3. Identify strategic research priorities constraining mango production, industry development, trade & market access

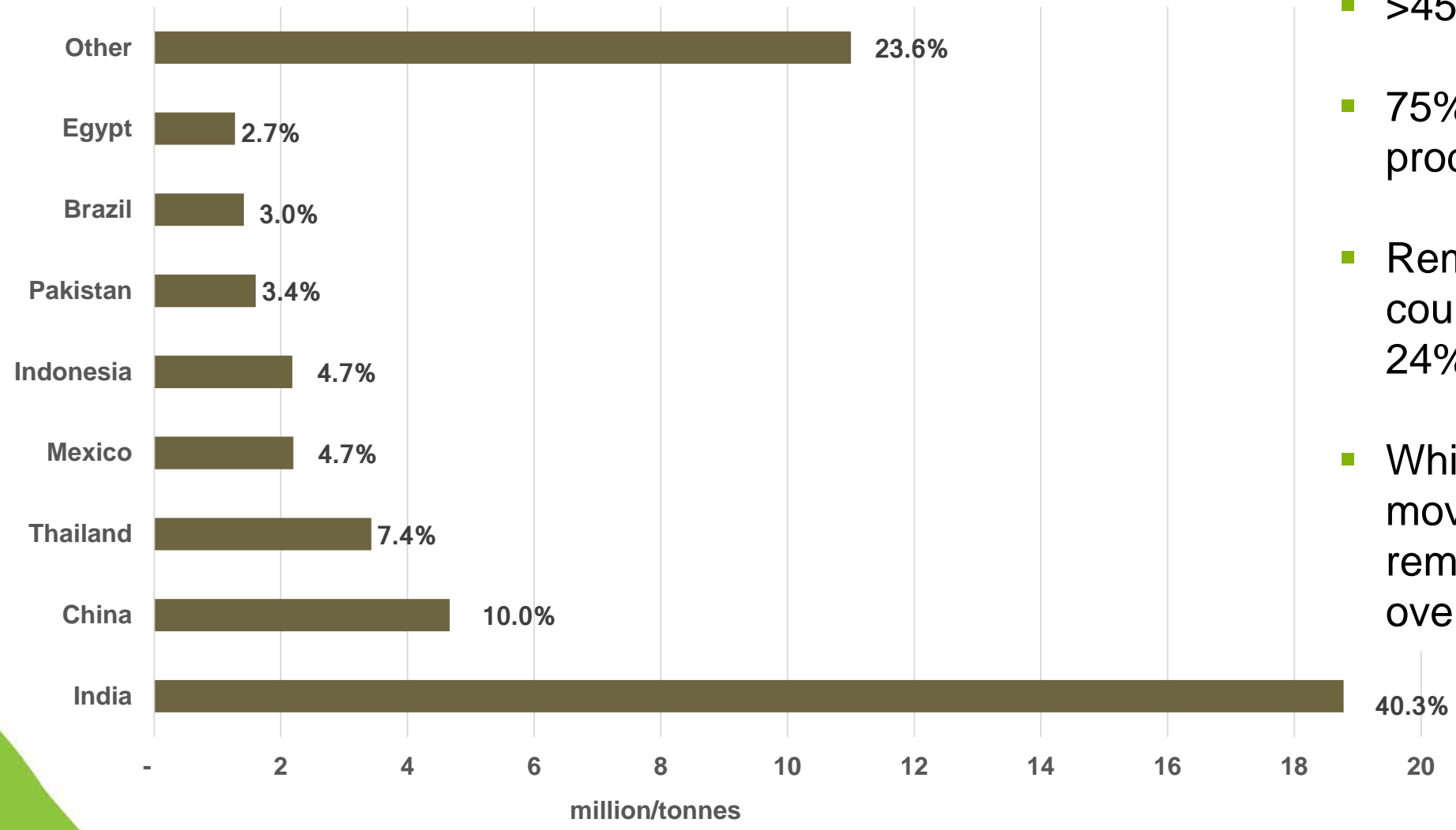


Research approach

- ▶ Global, Regional Asia & ACIAR Partner countries perspectives
- ▶ Production – volumes, values, planted area & yields
- ▶ Trade – volume & value
 - ▶ Exports
 - ▶ Imports
 - ▶ Pricing – relative unit value – price index
 - ▶ Market diversification and concentration
- ▶ Individual Country studies – related to challenges & opportunities
- ▶ Priority areas for future R&D



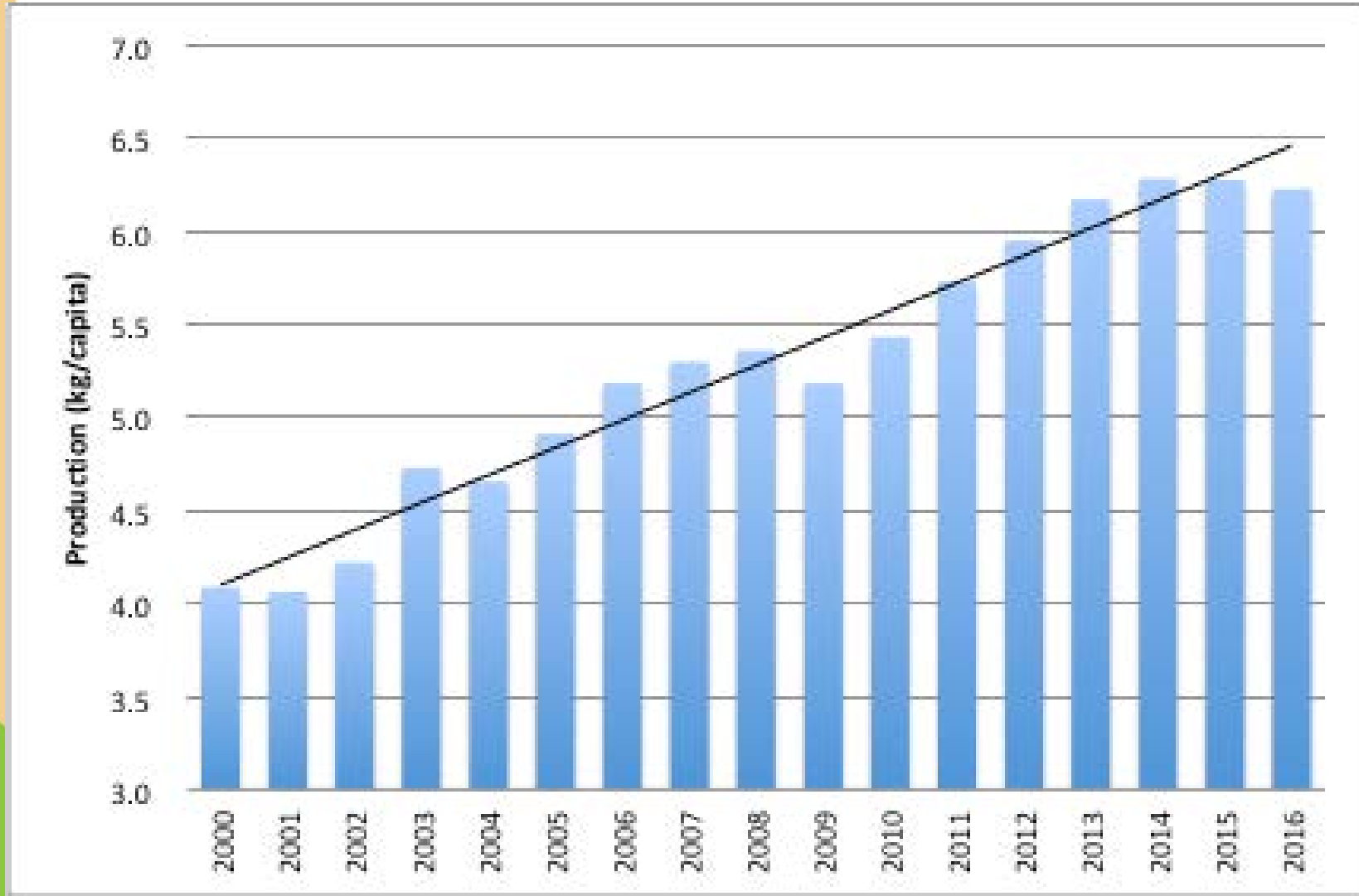
Share of Global Mango Production, 2016



- >100 countries
- >45 million/tonnes p.a.
- 75% occurs in top 8 producing countries
- Remaining 96 countries account for 24%
- While India dominant, movement in the remaining 7 countries over last 10 years



Global Mango Production – per capita 2000 - 2016



Global Population

- 2000 - 6.1b
- 2016 - 7.5b
- ▲ 22%

Mango Production

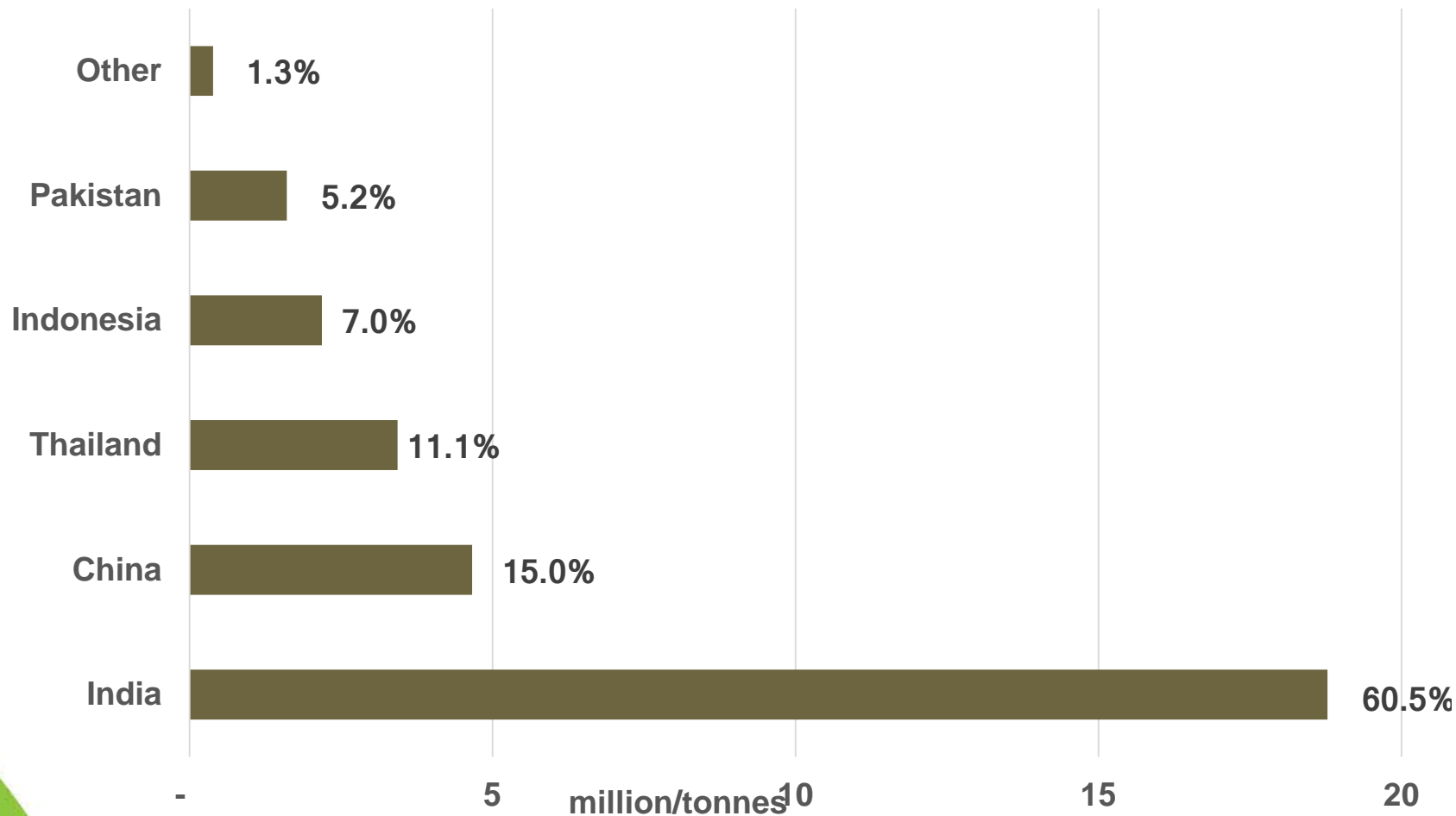
- 2000 - 25m/tonnes
- 2016 - 46m/tonnes
- ▲ 86.5%

Per capita basis. Avg. annual production has risen

- 2000 - 4.9 kg/capita
- 2016 - 6.4 kg/capita
- ▲ 50%



Share of Asia Mango Production, 2016



Southern Asia

- India, Pakistan, Bangladesh
- 65.7%

South-Eastern Asia

- Thailand, Indonesia, Philippines, Vietnam, Cambodia
- 18.5%

Eastern Asia

- China (incl. Taiwan), Japan
- 15.5%

Western Asia

- Israel, UAE
- 0.3%

- No production reported for Central Asia

FAO stats, 2017

Regional profile: Top 5 Asian **exporting** countries, 2001-2015 cumulative avg. growth

VALUE US\$ 'm	India	Thailand	Philippines	Vietnam	Pakistan
2001	18.44	14.42	35.99	3.41	-
2016	202.57	166.37	66.87	6.60**	65.84
Growth* %					
2011-2015	0.2%	11.5%	-7.1%	11.7%	8.1%
2001-2015	17.3%	17.71%	4.2%	4.5%	8.8%

- export growth in India has stalled
- Growth declined in the Philippines
- Thailand exports continue to grow

VOLUME '000 tonnes	India	Thailand	Pakistan	Vietnam	Indonesia
2001	45.35	30.24	-	3.98	5.31
2016	193.38	183.29	82.66	3.58**	35.66
Growth *%					
2011-2015	-3.3	3.8	-4.7	5.58%	20.2
2001-2015	10.2	12.8	0.9	-0.7	13.5

- Thailand is running solo with export growth over the last 5 years
- Vietnam is now making strong progress & likely to surpass Pakistan

Regional profile: Top 5 Asian importing countries, 2001-2015

cumulative avg. growth

VALUE US\$m	China	UAE	Vietnam	Hong Kong	Saudi Arabia
2001	11.24	-	0.05	48.33	23.67
2016	168.85	106.21	105.34	56.17	52.68
Growth *%					
2011-2016	1.8	7.5	46.9	-5.8	0.8
2001-2016	19.8	9.5	66.8	1.0	5.5

VOLUME '000 / tonnes	Vietnam	UAE	China	Saudi Arabia	Malaysia
2001	0.04	0.00	12.67	34.84	4.96
2016	130.26	103.42	72.77	54.10	51.16
Growth *%					
2011-2016	75.0	5.2	-8.2	-2.9	0.08
2001-2016	70.6	3.6	12.4	3.0	16.8

- UAE emerged as significant importer since 2005 with consistent growth since 2012
- Vietnam - growth since 2013

- Vietnam with dominant, with import volumes exceeding traditional importing countries
- Trend showing import increases for all 3 of the main Asian importing countries
- UAE imports are highly variable – ranging from a low base to over 100,000t in the last decade

* Cumulative average annual growth of imports. UAE data is from 2005.

Source: Trade Map, ITC.

Regional study - outputs

1. **Regional Mango Analysis**
2. **Individual in-market country studies**
 - Vietnam
 - Cambodia
 - Indonesia
 - Philippines
 - Pakistan
3. **Country studies** – mapping of in-depth R&D issues:
 - Production
 - Postharvest
 - Domestic trade
 - Export
 - Fruit Processing



Linkages to current Mango Agribusiness Research Program

Partner country & Australian R&D issues & priorities:

- Economically important crop
- Strong potential for market growth
- Opportunities exist to increase the incomes of livelihoods of smallholder mango farmers
- Mango research and market development is a high priority for research institutes and industry



Linkages to the ACIAR Mango R&D Strategy

- Market focussed & to identify areas of relative comparative & competitive advantage
 - Market, trade & value chain research
 - Genetic resources & breeding
 - Crop physiology, nutrition & flowering
 - Mango quality parameters, from demand & supply perspective
 - Fruit processing
 - Emerging P&D management, biosecurity & market entry context
- Informs the direction of future strategic mango technical research
- Benefits of partnership development & collaboration