



Improving smallholder farmer incomes through strategic market development in mango supply chains in southern Vietnam

**Annual Workshop
December 2020**

Activity 1.8 Wholesale market monitoring study – update & next steps

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Funding Agency



Australian Government
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Activity 1.8

- ▶ Undertake wholesale market monitoring

Focus

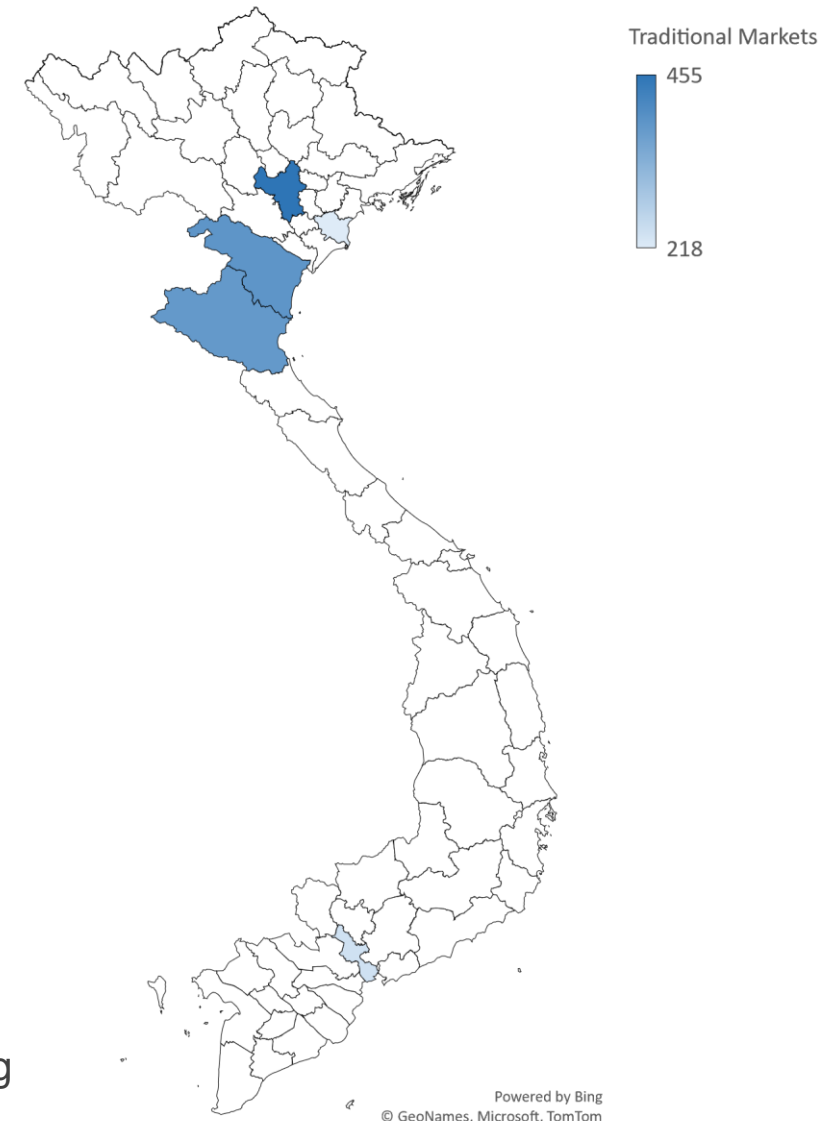
- ▶ To capture & track domestic mango pricing information in HCMC, Hanoi & wholesale centers

Research questions aligned to this activity

- ▶ What innovations have the most cost-effective & positive impacts on productivity, losses, quality & harvest timing leading to improved price & farmer incomes?
- ▶ What is the relative attractiveness of Hanoi & the export market of Hong Kong compared to the HCMC market for smallholder farmers?

Drivers of change

- ▶ Rapid transformation of domestic F&V distribution
- ▶ Traditional markets still play a vital role
- ▶ Vietnam - 8539 traditional markets & 83 wholesale markets
- ▶ Increases in:
 - supermarkets
 - convenience stores (incl. organic)
 - safe/organic food stores (organicfood.vn; vietgreenfood; Dalat G.A.P)
 - e-commerce businesses.
- ▶ Vietnam policies aim to:
 - increase international cooperation to further development wholesale markets
 - promote programs to encourage socialisation
 - attract domestic & foreign investment in building & developing wholesale markets.





- ▶ **Activity design**

- ▶ To capture qualitative & quantitative wholesale market information & understand supply trends, seasonality & pricing.

- ▶ **Data captured**

- ▶ Weekly mango prices from 20-25 wholesalers – 3 locations
- ▶ Hanoi = 5–10 wholesalers from Long Bien Market*
- ▶ HCMC = 10 wholesalers from Thu Duc Market + 5 wholesalers from Binh Dien Market
- ▶ Dong Thap = 1 wholesaler from My Hiep Market (pricing points between local wholesale & city wholesale markets)

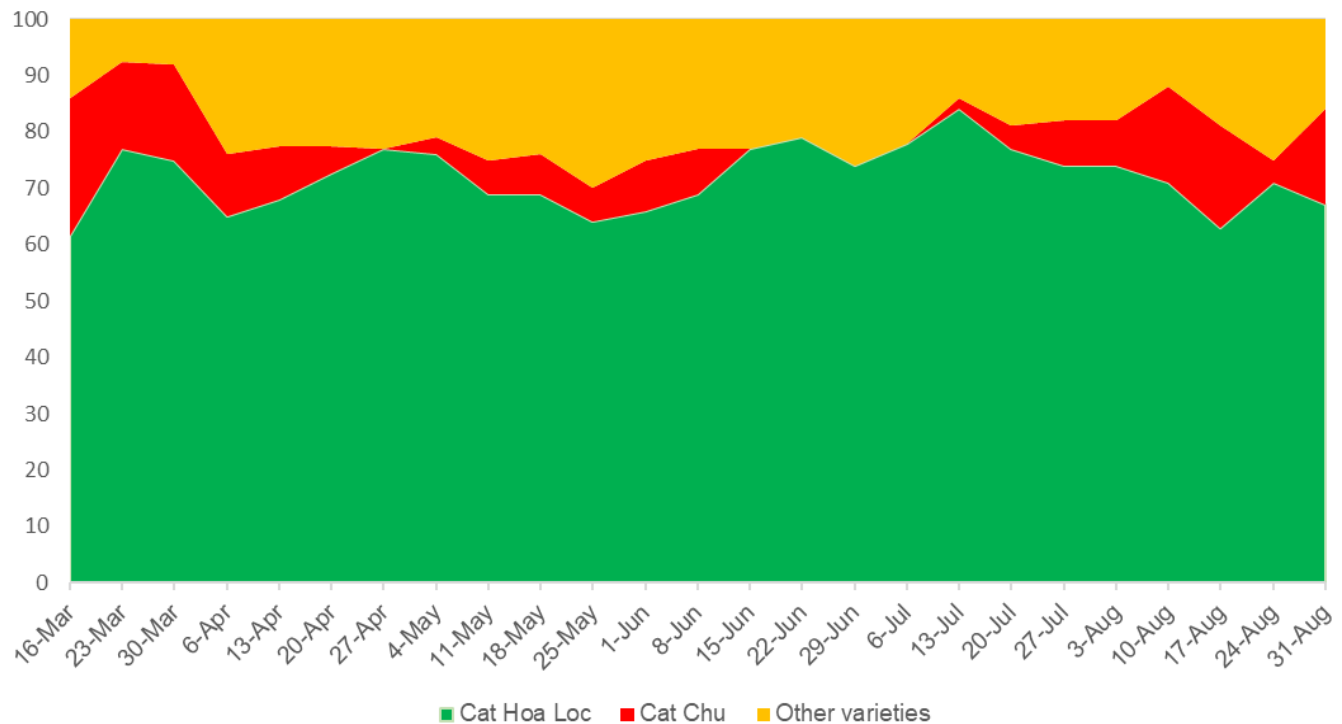
- ▶ **Instrument & target audience**

- ▶ Interview checklists (semi-structured) with MMUs (*who manage the wholesale markets in general & especially who manage the fruits segments of these wholesale markets*)
- ▶ Interviews – template, to collect weekly wholesaler information (in-person & via telephone).

*Note: Due to restrictions, Long Bien Market work is delayed until next mango season

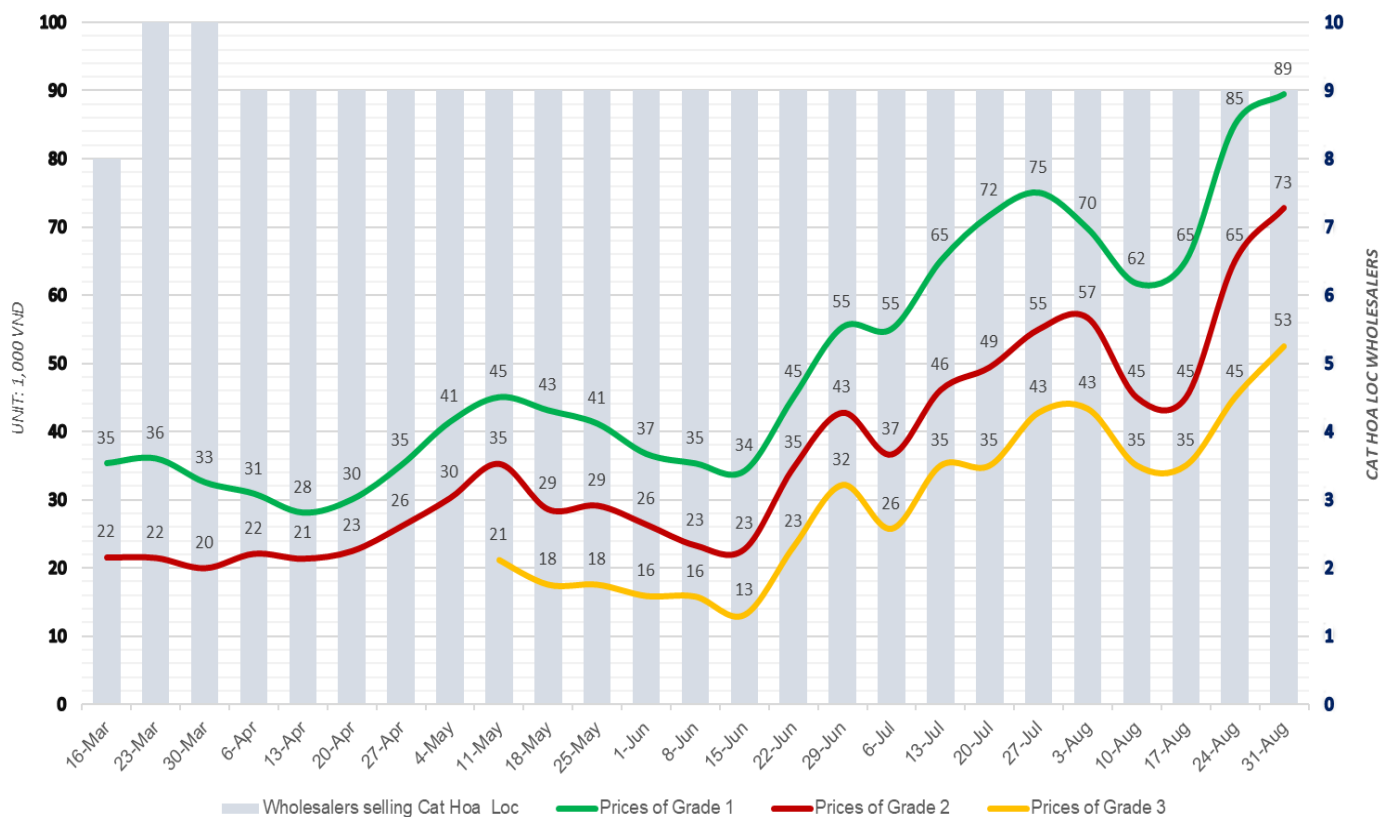
Results

Mango varieties of Thu Duc wholesalers



- Data collected - 10 specialised mango wholesalers (selling mango only)
- Cat Hoa Loc - dominant variety – from Mar to Aug – represents >60%
- Cat Chu main supply – March & Aug
- Other varieties – please insert variety names??
- Graph needs information – what is the left axis?
- Perhaps consider stating peaks & low or non-supply?

Results (cont.)



Cat Hoa Loc Wholesalers

- Price gap between Grade 1, Grade 2, & Grade 3: about VND10,000-15,000/kg (please include ?? AU\$)
- Peak-season (March to June) prices did not exceed VND50,000/kg (?? AU\$)
- Shoulder-season (after June) prices increased (sometimes double that of peak-season prices)
- The change of trade during the COVID-19 period had minor & short-term effects on Cat Hoa Loc prices (i.e. weeks 1&2, August 2020)

Source: Weekly mango prices, Thu Duc Market, March–August 2020



Results (cont.)

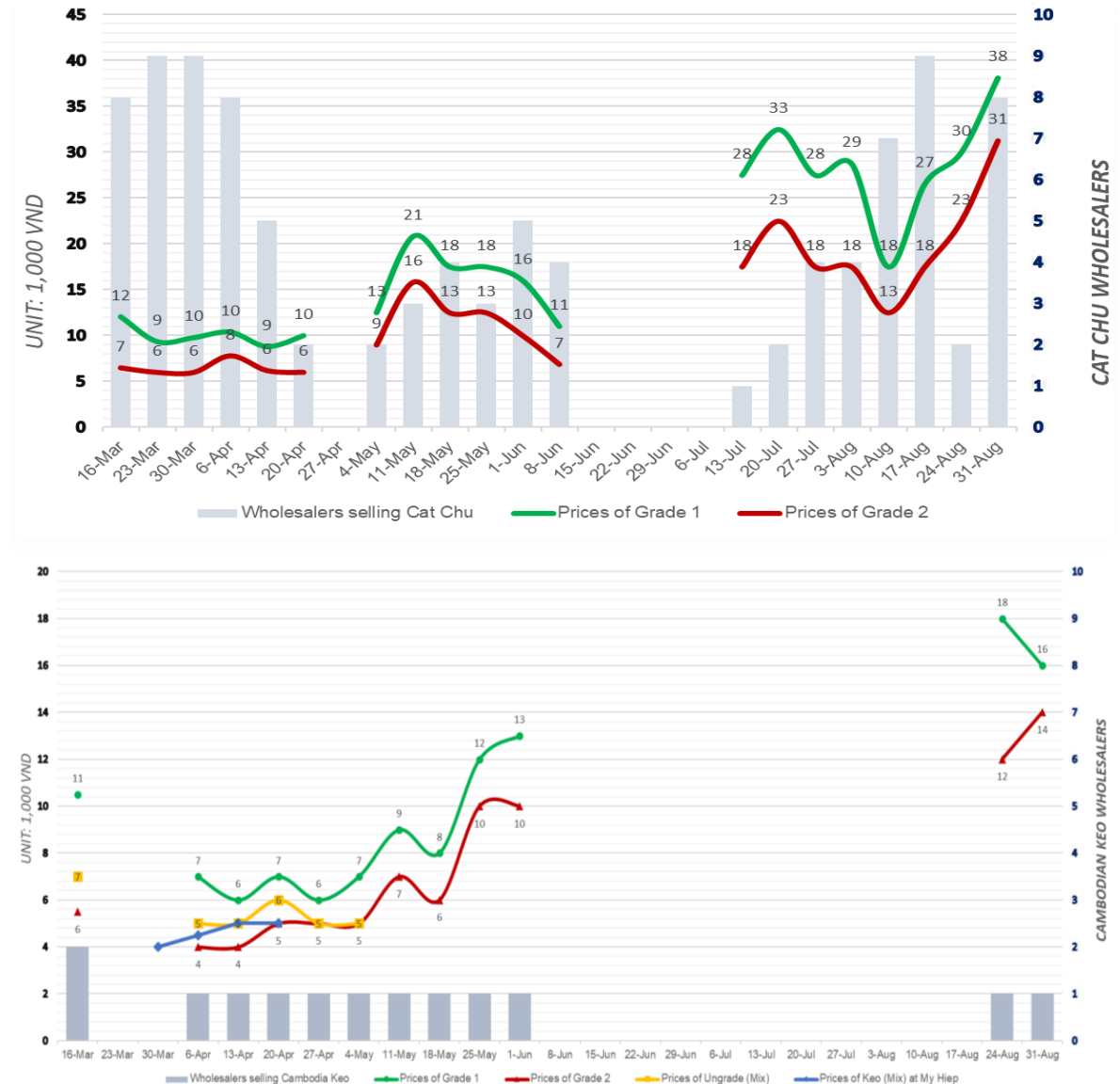
Thu Duc Market, March – August 2020

Graph 1

- ▶ Cat Chu variety - less volume than Cat Hoa Loc
- ▶ fewer wholesalers sold Cat Chu
- ▶ Cat Chu was not available in off-season (June, July)
- ▶ Only 2 grades – price gap – VND5,000/kg (AU\$??)
- ▶ COVID-19 trade restrictions impacted Cat Chu prices (March & early April) reduced Grade 1 price – VND10,000/kg (AU\$??)

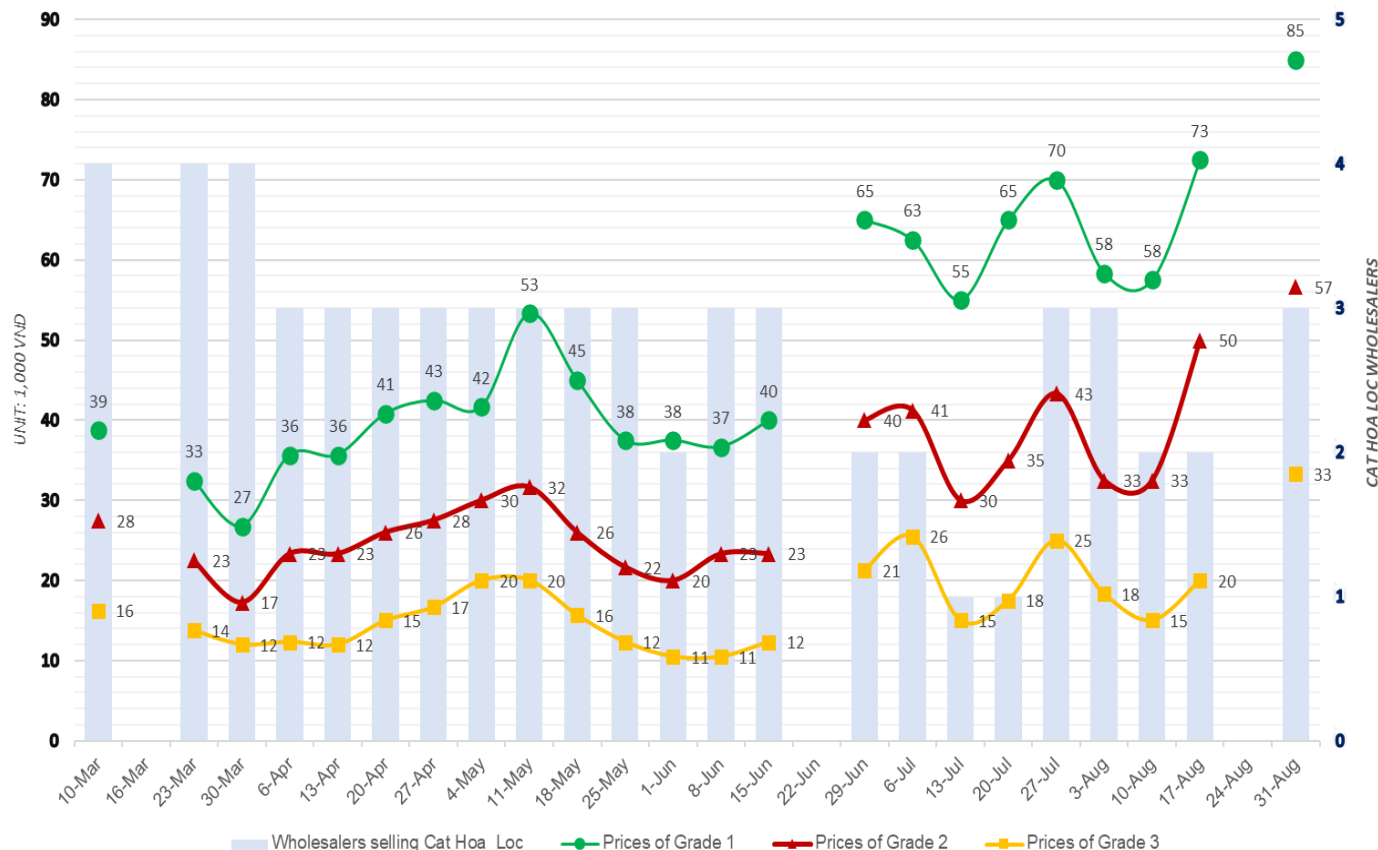
Graph 2

- ▶ Cambodian Keo variety - available (not as popular as Cat Hoa Loc & Cat Chu)
- ▶ Cambodian Keo lowest priced variety



Results (cont.)

Binh Dien Market (BDM), March – August 2020



Cat Hoa Loc variety:

- available for most of the monitoring period
- unavailable in some weeks
BDM mangoes only come from western provinces
[why?]
- larger price gaps between grades 1, 2 & 3
about VND10,000–
VND30,000/kg. **(AU\$??)**

Source: Weekly mango prices, Binh Dien Market, March–August 2020



Results (cont.)

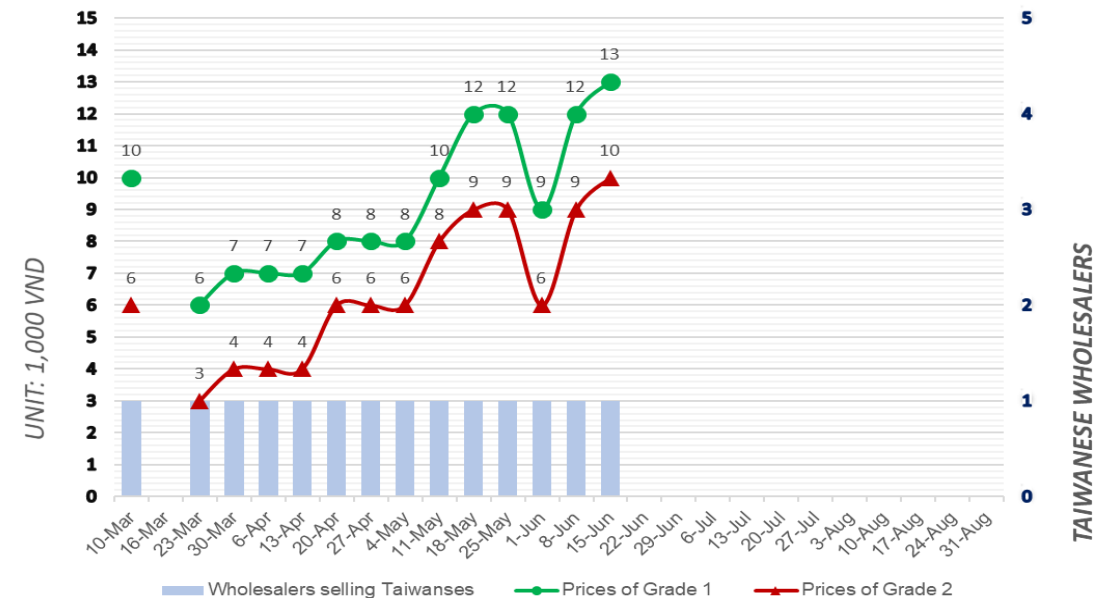
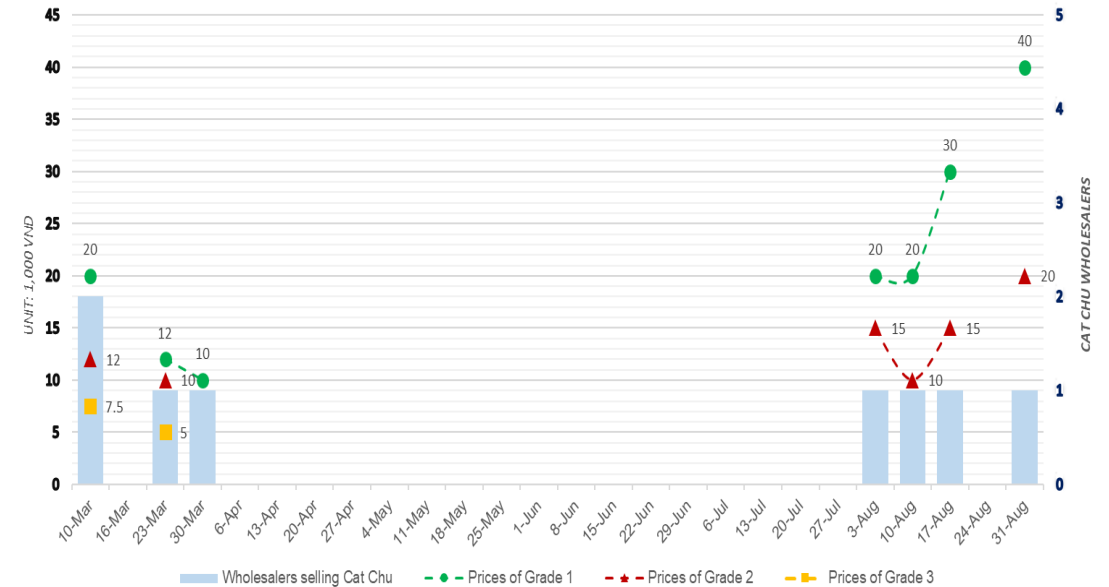
Binh Dien Market, March – August 2020

Graph 1

- Off-season Cat Chu mangoes came from the western provinces in April to August (not available in Binh Dien Market) (This sentence is not clear, please clarify)
- Fewer wholesalers sold Cat Chu variety
- Wholesalers classified Cat Chu into 2 grades (gap: VND5,000/kg–VND20,000/kg) (AU\$)
- Cambodian Keo variety unavailable

Graph 2

- Taiwanese mangoes – lowest selling price used for green/salad eating



Source: Weekly mango prices, Binh Dien Market, March – August 2020

Outputs & Outcomes

Outputs

- ▶ Mango trading information of the selected wholesalers
 - ▶ Long Bien Market, Hanoi
 - ▶ Thu Duc Market, HCMC
 - ▶ Binh Dien Market, HCMC

Outcomes

- How will this information help?
- Who will we share it with?
- Who will it benefit?

Weekly wholesale market data capture

- ▶ My Hiep: 1-2 wholesalers
- ▶ Binh Dien: 5 wholesalers
- ▶ Thu Duc: 10 wholesalers

Long Bien market interviews

- ▶ Long Bien Market Management Unit
- ▶ Weekly: 5-10 wholesalers

