



Mango Agribusiness Research Program

Agribusiness research and development opportunities
for tropical fruit processing in the Asia-Pacific region
AGB/2016/010

Session 3: Mango Processing Innovations & Product Developments in Asia

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Title: The Philippines – Case Study

24 & 25 November 2018

Information
Markets
Biosecurity
Quality

Implementing Agency



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Introduction

- ▶ The Philippine mango processing industry is hinged primarily on the ‘Carabao’ variety—unique taste and firm pulp (suitable for processing).
- ▶ The Philippines ranked 7th in exports of fresh and dried mango (valued at USD91M) equivalent to 4% share of the global market (UNComtrade, 2016).
- ▶ Accounts for an average of 10% of world fresh and dried mango exports (FAO, 2016).
- ▶ Major export destinations in 2015 were the US (24%), Hong Kong (17%), Republic of Korea (13%) and Japan (12%) (UNComtrade, 2016).



Carabao Mango



Have little to no fiber, have non-turpentine taste, and taste sweet when ripened properly. Good acid and sweetness balance.



Introduction





Overview: Commercially important processed products

- ▶ The Philippines exports mangoes to 48 countries
- ▶ Fresh mango is the leading dollar earner of the country, constituting 59% of total mango exports
- ▶ Commercially important processed mango products are:
 - ▶ dried mangoes (16%)
 - ▶ mango puree (18%)
 - ▶ juice concentrates (6%)
 - ▶ other mango juices (1%)



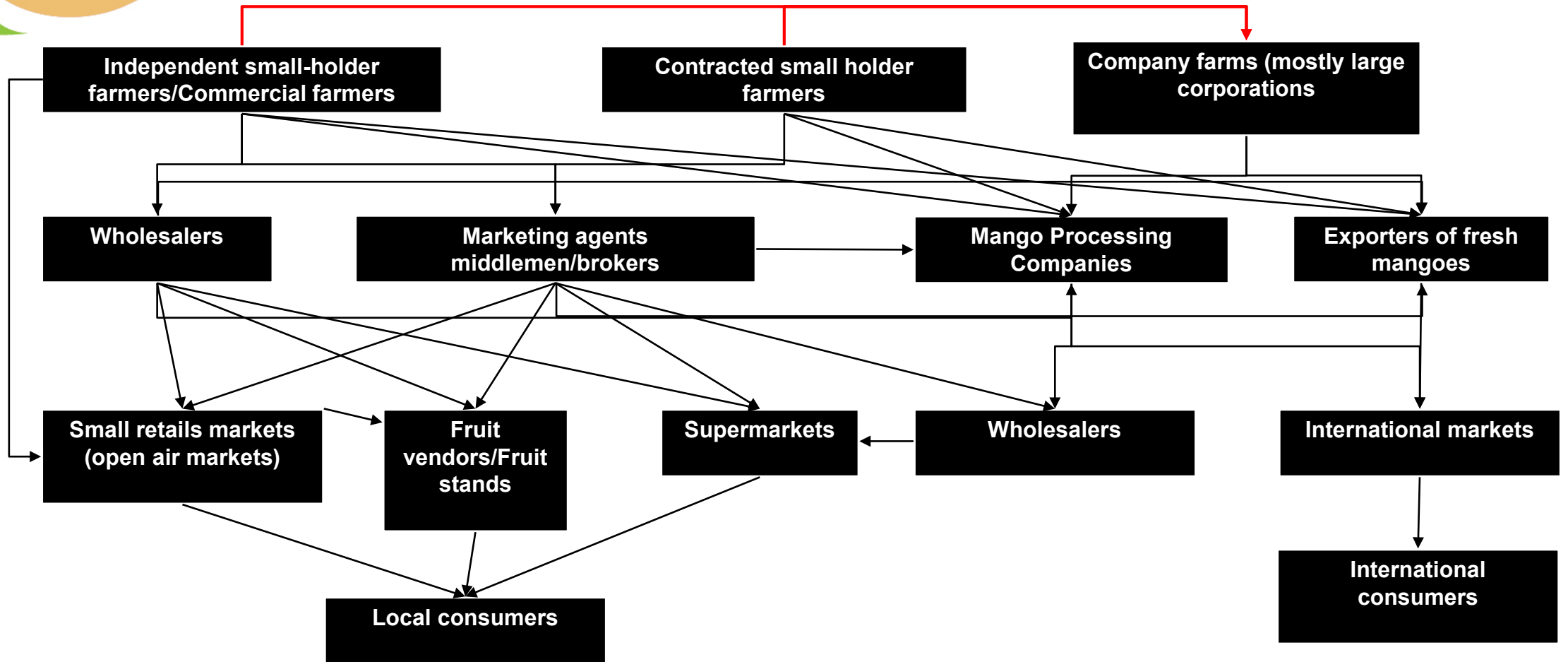


Raw material status

- ▶ Unreliable supply of raw materials mainly due to, or in combination with other factors, such as;
 - ▶ Low farm productivity due to low yielding and unproductive trees including high incidence of diseases and insect pests (also due to contractors?)
 - ▶ High seasonality of 'Carabao' mango vis-à-vis adequacy of supply of raw material
 - ▶ Also, farms are mostly small-scale, and non-commercial
- ▶ High cost of production (farm inputs)
- ▶ High cost of processing inputs – attributed to government regulations, i.e. high cost of sugar due to high tariffs and regulatory barriers to sugar importation



Distribution (Chain Engagement)



Source : Adapted from ITC, 2014



Issues & Opportunities

ISSUES	OPPORTUNITIES
1. Seasonality, and production-related issues – adequacy of supply/lack of raw material	Philippine Government has put in place a 5-year Mango Industry Road Map to address policy, production and processing related issues (with the Departments of Science and Technology, Agriculture and Trade and Industry) and the Mango Industry Foundation, Inc.
2. High production and marketing cost in the different levels of the value chain	
3. Competition – cannot just capitalize on superior taste of ‘Carabao’ mango	<ul style="list-style-type: none">• Product development and innovation – mango leather, green mango chips, mango powder, etc. by agencies such as Food and Processing Innovation Centre under the Department of Science and Technology, nice frozen dry (NFD) mangos by Del Monte Phils.• Increasing global demand for mangoes
4. Lack of good postharvest management and SPS control	Research and development, process upgrading, obtain certifications for farms and packhouses to meet phytosanitary or quality requirements to enter into certain markets
5. Lack of modern production and harvesting techniques	

Acknowledgements

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