



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

**Mid Term Review
July 2021**

Activity 1.7 Hong Kong case study - Stage 1

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Implementing Agency



SIAEP



Funding Agency



Australian Government
Australian Centre for
International Agricultural Research

Activity 1.7

- ▶ Undertake an export market case study in the Hong Kong market.

Focus

- ▶ This activity will deliver a business case study focused on the Hong Kong market as an export opportunity for Vietnamese and Australian mangoes.

Research questions

- ▶ Is the export market to Hong Kong attractive and feasible for export of mangoes from southern Vietnam and Australia?
- ▶ What is the relative attractiveness of Hanoi and the export market of Hong Kong compared to the HCMC market for smallholder farmers?



Key insights

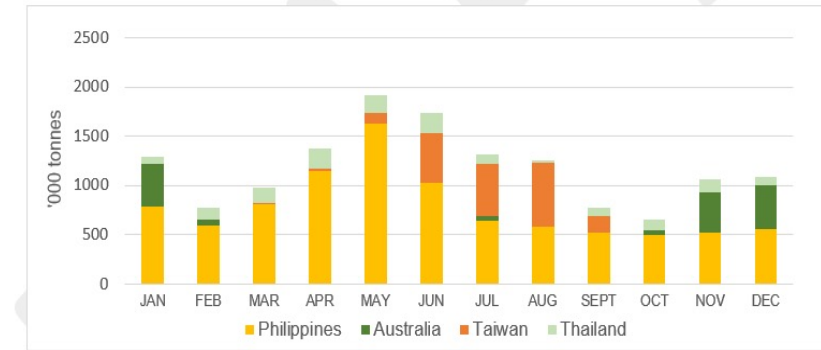
- HK – accessible market for VN mangoes
- Peak season (Jul - Aug) - Filipino mangoes dominate
- Festive season (Dec - Jan) - Australian mangoes significant presence, premium price point & well accepted by consumers
- VN mangoes are often unknown or not considered by HK traders
- HK retailers display mangoes loose (without packaging or boxing)
- Consumers usually purchase mangoes ready-to-eat
- Supermarkets prefer green mangoes to deliver longer shelf-life
- VN mangoes were seen to be sourced via land trade through China
VN fruit often mixed with Chinese mangoes, therefore can often not be identified by HK customers

Figure: The similarity between Vietnamese yellow Keo mangoes (left) and Chinese Jade mangoes (right)



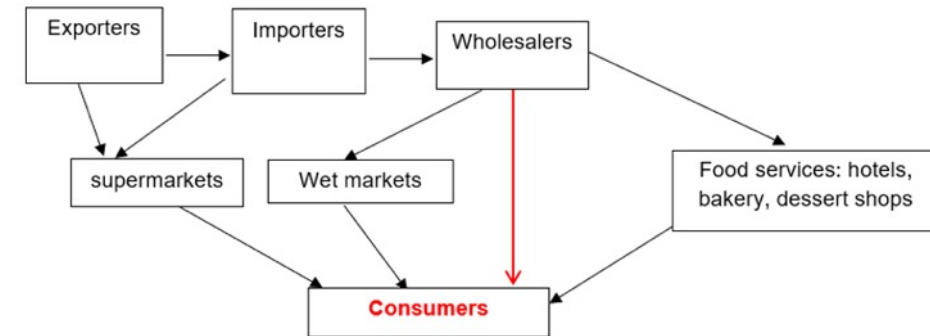
Source: xoakimhungdongthap.com (left) and the mango retail observation survey (right)

Figure: Top four total mango imports, Hong Kong, 2019



Source: Tradedata 2020 (Note: HS Code 08045020, fresh and dried)

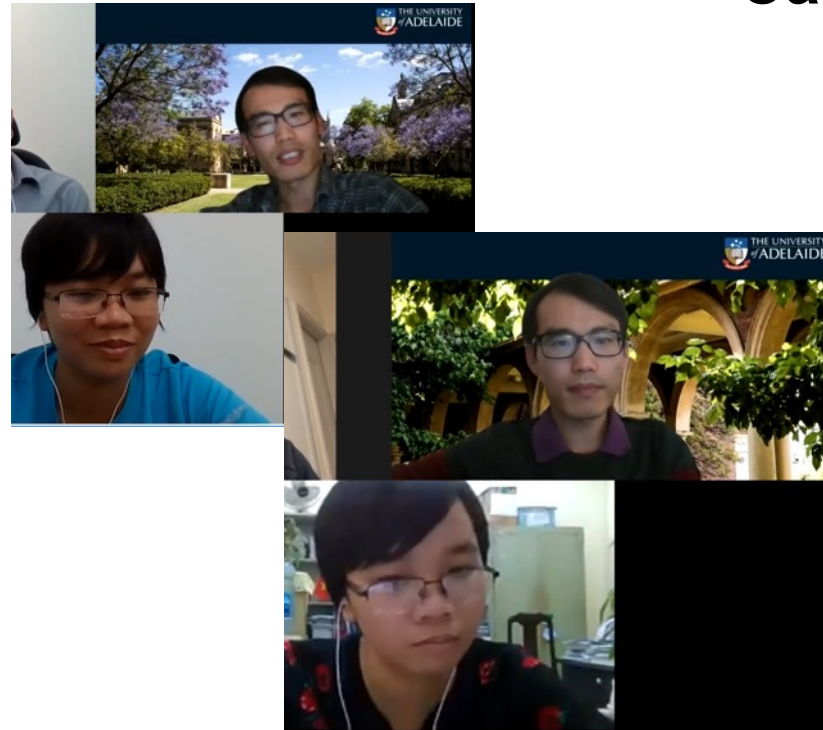
Figure: Mango supply chain in Hong Kong market



Source: Hong Kong mango wholesale visit, December 2020

Capacity Building

- ▶ Research design skill development
- ▶ Checklist design for semi-structured interviews
- ▶ Online interview interview experiences
- ▶ Developing qualitative data analysis & synthesis skills



Team:

- ▶ Alec Zuo
- ▶ Dieu Phan
- ▶ Robin Roberts
- ▶ MZMC consulting
- ▶ Tim Choi





Lessons learnt

What worked well:

- ▶ research design was flexible – utilizing 2 types of data capture - online interviews & in market observations
- ▶ Observations - wholesale market & retail outlet (*festive season trading*)
- ▶ Online interview approach
- ▶ Partnering with an in-market contact



What could be changed or improved next time:

- ▶ Increased numbers – retail outlets in a ‘normal’ trading period
- ▶ Observation studies mid-year, peak summer trading season





Pathway to completion

July '21 – March '22

- ▶ Wholesale & retail pricing/packaging observation study
- ▶ Identify the potential to undertake in-store consumer tasting evaluation for Vietnam and Australian mangoes.
- ▶ Outcomes presented at annual workshop Nov '21.

Future Opportunities

- ▶ A large scale feasibility study of mango trade with HK specifically for the food service sector for exports from VN Packhouses to assess trade viability.
- ▶ In-depth understanding of the acceptance of new AU mango varieties by HK consumers is required.
- ▶ Understand other fruit and vegetable trade opportunities between Southern VN with Hong Kong.

