



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

End of Project Review
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Title: Export opportunities in Hong Kong & Europe

Presenter: Dieu Phan, University of Adelaide/SCAP

Research Team: Dieu Phan, University of Adelaide/SCAP
Alec Zuo, University of Adelaide/SCAP
Robin Roberts, Griffith University

Implementing Agency



Funding Agency



Australian Government
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Aim & Objectives

Key focus

- ▶ Deliver a business case study focused on the Hong Kong market as an export opportunity for Vietnamese and Australian mangoes.
- ▶ Gather market insights on consumer behaviour in mango consumption in the UK, France and Germany.

Research questions

- ▶ Is the export market to Hong Kong attractive and feasible for export of mangoes from southern Vietnam and Australia?
- ▶ What is the mango purchasing behaviour of consumers in the UK, France and Germany?
- ▶ What mango attributes are preferred by consumers in the UK, France and Germany?

Overview

Hong Kong Market

- ▶ Hong Kong is an easy access market to sell mangoes from other countries
- ▶ Dynamic market –usually showing upward trend in consumption –especially fresh fruit & vegetables; but recent concerns are the city’s unrest & impact of travel restrictions
- ▶ It serves –as a major re-export destination, >50% imported foods –traded into China & nearby regions
- ▶ During the peak season mangoes from The Philippines dominate the market; Australian mangoes are the most popular varieties in the wintertime;
- ▶ Despite affordable prices and reasonably quality, Vietnamese mangoes are not often traded by sellers

European Market

- ▶ Mango consumption in Europe is rising despite difficulties in sourcing and the preference for local seasonal fruit
- ▶ Germany, the UK and France are the major markets for imported mangoes
- ▶ Kent and Keitt varieties are preferred (mainly from Brazil, Peru and northern African countries)
- ▶ There is increasing demand for ripened and freshly cut mangoes
- ▶ There is maximum residue levels (MRLs) requirement for pesticides and other contaminants, such as heavy metals
- ▶ A phytosanitary document is required for exporting mangoes to Europe and hydrothermal treatments (also called hot water treatment) prior to export are the standard

Benefits of change



Hong Kong

- ▶ Vietnamese mangoes are sold at affordable prices and are of reasonably good quality. Vietnamese exporters are able to ship their green mangoes by sea to reduce shipping costs.
- ▶ Vietnamese mangoes are often combined with Chinese mangoes & therefore, often not recognised by Hong Kong customers.

UK, France and Germany

- ▶ Consumers regard the top three extrinsic mango attributes that influence purchasing decisions are flesh texture/mouth feel, sweetness and ripeness while UK and Germany consumers also regard juiciness important. The top three extrinsic attributes are chemical-free claim, price and food safety certification.
- ▶ Consumers (75%) prefer medium sized mangoes (350-550g) most while UK consumers (21%) also like large mangoes (550-800g).
- ▶ Most consumers buy one (23%) or two (44%) mangoes at each purchase.
- ▶ Around 45% of consumers do not know the country of origin for the mangoes they purchase.
- ▶ 28%, 21%, 19%, 12% and 5% of consumers know the purchased mangoes are from Brazil, Peru, Spain, Vietnam and Australia, respectively.
- ▶ 34% and 18% of consumers have food safety concerns regarding fresh fruits imported from Vietnam and Australia, respectively.



Pathways to adoption

Hong Kong

- ▶ Vietnamese mangoes should be targeted at customers of traditional wet markets (and supermarkets); however, time is needed to conduct consumer marketing and education, before targeting higher-income customers.
- ▶ Training should be considered for Vietnamese mango supply chain stakeholders to supply high-quality Vietnamese mangoes (e.g. Walking the Chain for exports).

UK, France & Germany

- ▶ Vietnamese mangoes suppliers need to achieve certificates such as chemical-free, food-safety, & fair-trade certifications to better serve the premium mango market.
- ▶ For mango exporters in Vietnam, a starting point to the EU market could focus on medium sized varieties, proper ripeness, and twin-size packaging.
- ▶ There may be significant growth potential for freshly cut mangoes in the EU market, particularly in the UK.