



USAID FIRMS PROJECT

# Fruit Logistica and E.U. Mango Marketing Report

March, 2011

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# Abstract

An 11-member delegation of Pakistani mango sector stakeholders participated in Fruit Logistica, the world's premier fresh produce marketing event. Additional export market development activities included site visits to the main retail supermarkets and the Berlin Wholesale Produce Market. The delegation consisted of producers, exporters and equipment/service providers. Business meetings were arranged with the delegates and multiple mango importers who procure fruit for the mainstream retail supermarkets in the UK and EU. The meetings highlighted the confidence and trust that must be established between suppliers, exporters, and importers in obtaining consistent supplies of high-quality mangoes at profitable market return prices.

The interest level among potential importers about receiving Pakistani mangoes in the U.K. and EU remains high. Significant additional market linkages were made between the growers and exporters and the UK/EU mango importers. The stakeholders also achieved a greater level of understanding in mango quality and packaging requirements needed for success in the European market. Continued test shipments will be made in 2011 to multiple importers. Details of the cost-sharing arrangements between the stakeholders for fruit, cartons, transportation, and other expenditures were discussed in detail, with refinements and financial commitments to be finalized prior to the beginning of the harvest season.





# Acronyms

BRC	British Retail Consortium
C.I.F.	cost, insurance, and freight
ETI	Ethical Trading Initiative
EU	European Union
F.O.B.	freight on board
HACCP	Hazard Analyses Critical Control Point
IFS	International Food Standard
SEDEX	Supplier Ethical Data Exchange
UK	United Kingdom
USAID	United States Agency for International Development



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# Executive Summary

The world's premier fresh produce trade show and marketing event, Fruit Logistica, was held in Berlin, Germany from February 9 to 11, 2011. The 3-day event drew more than 56,000 visitors from 132 countries and saw a record 2,452 exhibitor booths from 84 nations. An 11-person delegation from Pakistan attended under the auspices of the Firms Project, in addition to about a dozen more Pakistani public and private produce sector representatives.

The Pakistani mango producers and exporters were introduced to a number of leading UK and EU fresh produce import companies and established important business linkages with multiple mango importers. Discussions were held between the potential importers and Pakistani producers/exporters on mango quality requirements, packaging, and future export market opportunities. The EU importers agreed to receive initial trial shipments of fruit from Global GAP and supermarket-approved suppliers in the upcoming harvest season for evaluation and presentation to their retail sector supermarket clients. The importers stressed their requirement for consistent supplies of mangoes for an entire harvest season. This will necessitate sourcing the mangoes from multiple suppliers and different growing locations, beginning with Sindhri in late May and finishing with White Chaunsa in September. The importers representing the mainstream supermarkets expressed interest in eventually putting together a marketing program over many months, not just a single isolated shipment. The majority of importers felt that they would be able to successfully market green-skinned mangoes from Pakistan with superior flavors in the European retail supermarket channels.

In addition to the importer/buyer meetings, multiple supply companies who offered products and services for production, harvesting, cleaning, grading, sorting, packing, packaging, drying, and transport of mangoes were also visited.

The mango growers and exporters were provided a rich learning experience on export marketing of mangoes and established personal contacts with multiple large volume European mango importers. Participation in Fruit Logistica was the ideal forum for networking and establishment of future export deals between Pakistani mango growers and exporters and EU importers representing the mainstream retail supermarkets.

It will be up to the Pakistani growers and exporters to carry the export market momentum forward. Many importers and buyers have been identified and are waiting to receive high quality fruit. Firms should continue to help facilitate exports through test shipments from Global GAP-certified growers, with cost sharing among the stakeholders.

Multiple potential buyers are lined up to receive product, but the quality of the fruit during the post-arrival time period (7-10 days) in the UK/EU must be significantly improved in order to meet the standards of the buyers. The problems with postharvest

decay, fruit softness, and lack of skin coloration after arrival must be overcome if Pakistani growers and exporters are to achieve success by marine container transport.

# 1. Objectives

The objectives of participation at Fruit Logistica and conducting the Berlin wholesale and retail produce market study tour were to 1) further develop export market opportunities for the Pakistani mango sector; 2) educate the participants about the mango fruit quality and packaging requirements in the European market; and 3) establish future market linkages and initial trial shipments between the producers/exporters and leading European mango importers.

# 2. Background

The USAID Firms Project organized a market awareness and linkage tour to Berlin, Germany from February 7 to 13, 2011. In attendance were a diversity of stakeholders from the Pakistani mango sector, representing producers, exporters, carton and equipment manufacturers, marketers, and processors. The group visited numerous retail and wholesale produce markets in Berlin and attended Fruit Logistica, the world's largest fruit and vegetable trade show. Numerous new and existing market contacts were made with leading EU mango importers who purchase large volumes of product for the retail supermarket sector. Group discussions were pre-arranged between growers, exporters, and UK/EU importers to establish future market linkages and initiate export shipments in 2011. The interest level for Pakistani mangoes among the importers in the UK/EU remains high.

The Fruit Logistica trade show and Berlin market tour provided excellent opportunities to strengthen working relationships between producers, exporters, mango technical specialists, and importers. The market tour was also a very positive educational event which allowed the producers and exporters an opportunity to understand the EU market quality and packaging standards for mangoes. Extended group and individual discussions were held long into the evening and early morning hours after each day's events.

All of the producers and exporters present in the Pakistani delegation agreed to go forward with trial shipments to different market destinations in 2011. Lengthy discussions were held on the initial plans for these shipments. Further detailed follow-up meetings and arrangements are planned in the weeks prior to the late-May harvest of the Sindhri cultivar.

### 3. Retail Market Visits

A range of retail supermarket visits were made throughout Berlin. The tour delegates were able to see mangoes being marketed in all the retail stores. In-store displays typically ranged from one to multiple cartons of fruit on the shelves. In most cases, the mango fruit were presented in bulk, either in an open-top carton or in another type of container. In several of the stores, a 2-count pack was available, enclosed in a small plastic bag.



Figure 1: Mangoes in open-top container



Figure 2: Mangoes in 2- count bag

The majority of stores had green-skinned, red-blushed Kent mangoes from Peru. The small-store no-frills discount retailers like Netto and Aldi charged the lowest price, while



the larger full-service upscale retailers like Kaufhof, Karstadt, and KaDeWe charged the most. The retail store price for individual Kent mango fruit from Peru was as follows: €0.59 in Netto, €0.69 in Aldi, €1.49 in Metro Cash & Carry, €1.99 in Kaufhof, €1.99 in Karstadt, and a pricey €9.98 in KaDeWe. The individual fruit weight ranged from about 350-600 gm in the different stores. In addition, Metro Cash & Carry stocked Nam Doc Mai yellow-skinned mangoes from Thailand wrapped in Styrofoam sleeves at a price of €4.27 per fruit and KaDeWe was selling Nam Doc Mai mangoes for €1.49 per 100 gm.



**Figure 3: yellow-skinned mangoes from Thailand wrapped in Styrofoam sleeves**

The wholesale club store Metro Cash & Carry also was selling 4-kg cartons of Kent mangoes for €9.18 per carton.

The delegation was able to hear the comments of Metro produce section employees related to the prior arrival quality and consumer acceptance of Pakistani mangoes during the summer months. In general, the produce section employees indicated Pakistani mangoes are well received by their customers. They hope to continue with future supplies, but have not developed the confidence in the market quality of marine container shipped mangoes.

A Turkish-owned ethnic fresh produce store was also visited. They were selling 3 Kent mangoes for 1€. The average fruit weight was about 350 gm.

Dried mangoes packed in Germany in 100 gm sealed bags were available both at Karstadt and KaDeWe. The retail price was €2.99 per bag in both stores. In addition, bulk displayed dried mangoes were available for purchase from the dried fruit display.

## 4. Berlin Wholesale Produce Market Visit

The main Berlin Wholesale Produce market was visited in the early morning hours to observe market activities along with mango availability and quality. The market has 85,000 square meters of total area total area, with 34,000 square meters of enclosed space. Forty-five vendors offer a wide diversity of fresh and agro-processed fruit and vegetable products. Each merchant also has their enclosed cold storage facility for temporary storage of their perishable items. Produce items from this wholesale market typically are procured by small shop owners, hotels, restaurants, institutions, and foodservice providers. Mangoes were available from Peru (Kent) and Thailand (Nam Doc Mai).



Figure 4: Mangoes were available from Peru (Kent)



Figure 5: Mangoes from Thailand (Nam Doc Mai).

Several merchants had pallets of mangoes on display, with each pallet containing 252 cartons (4-kg size). The cartons were stacked 3 x 4 per layer and 21 layers high.



Figure 6: Stacked Mango Cartons

## 5. Fruit Logistica Importer Meetings

### 5.1 Bakker Barendrecht

Bakker Barendrecht is the exclusive supplier of fruits and vegetables to the Albert Heijn supermarket chain, the leading retailer in the Netherlands. Albert Heijn has a 39% market share of retail sector produce sales in the Netherlands. Bakker is also the supplier of mangoes to the discount retailer Edeka in Germany. Bakker typically markets 7,000-8,000 cartons of mangoes per week. The company is a member of the Univeg Group in Europe.

Bakker was the importer of the Metro marine container trial shipments from Pakistan several years ago. The mangoes arrived in acceptable condition, but did not ripen properly and mostly deteriorated within a few days. The shipment was a financial loss and Bakker indicated considerable more work needs to be done to develop marine container transport for Pakistani mangoes. Bakker feels they can only be sent by air at the present time. Also, the pesticide maximum residue limits (MRL's) are becoming much more restrictive by the Dutch supermarkets and the growers/exporters were cautioned to be very aware of this.

Bakker expressed significant interest in receiving small volumes of Pakistani mangoes by air in the upcoming harvest season. If this goes well, they are amenable to also receiving a 20-foot marine container shipment. Bakker estimated they could market up to 800 cartons of Pakistani mangoes per week. They prefer the mangoes be sent in 4-kg open-top cartons, without any labels or fruit wrapping. The fruit size can range from 7-8 count (500-575 gm) for bulk displays to 10-12 count (330-400 gm) for pre-packed fruit (2 fruit per pack). Bakker typically pays between 4.5-6.0 € c.i.f. Barendrecht per 4-kg carton.

## **5.2 Natures Pride**

Nature's Pride is one of the leading mango importers to continental Europe. The company has over 400 customers and markets fresh produce to 35 different retailers throughout Europe. Nature's Pride purchases about 5 marine containers of mangoes per week. The proprietor expressed serious interest in receiving Pakistani mangoes for their supermarket clients this season. Nature's Pride prefers to receive 40-foot container volumes. Present in the group discussion were representatives of Bama, one of the main fresh produce importers in Norway. This firm has a partnership agreement with Nature's Pride and the Bama import manager expressed serious interest in marketing Pakistani mangoes to their retail and wholesale sector customers. They would like to begin with an initial shipment in late May. Both Nature's Pride and Bama felt they could successfully market green-skinned, ready-to-eat Pakistani mangoes, if the fruit firmness and flavor quality was appropriate. They prefer 6-7 fruit per 4-kg carton, over-wrapped with a clear plastic sealed top.

The Nature's Pride-Bama market linkage represents another major opportunity for the Pakistani mango export industry and should also be prioritized by Firms. The suppliers would have to meet Nature's Pride and Bama's due requirements and the packinghouses need to be audited and certified by an independent third party in order to comply with retailer ethical and social responsibility requirements. Nature's Pride also emphasized the need to comply with the strict pesticide residue limit tolerances in the E.U. The mangoes will be tested for residues and if any illegal chemical residues are found or if the fruit is in violation of pesticide tolerance limits it will be destroyed and the cost of disposal will be charged to the grower/exporter.

### 5.3 Solfruit

The import manager for Solfruit discussed the fruit quality requirements needed for sustained market presence among his EU retail supermarket clients. The mangoes must arrive in reasonably firm condition, in strong 4-kg open-top corrugated cartons, and free of postharvest decay. The fruit must have at least a 7-10 day additional market life after arrival in order to complete the inland transport and distribution process to the individual retailer. The SB Chaunsa and Fajri fruit sent by refrigerated marine container to Solfruit in July, 2010 was too soft and did not have the firmness or quality that allowed for retail marketing of the fruit. Also, there was considerable carton damage and collapse during transit due to inadequately secured loads on many of the pallets. Nevertheless, Solfruit is still very interested in making the export deal work from Pakistan. The flavor of the fruit sent in 2010 to Solfruit was excellent. Mr. Rodriguez felt it would be possible to successfully market green-skin colored fruit in the retail supermarkets. Currently, there is no presence of Pakistani mangoes in the mainstream EU retail supermarkets. Consumer education and promotion efforts will be important in the EU to spread awareness that green-skinned Pakistani mangoes are a superior eating mango. This long-term advertising, market promotion, and consumer education program for Pakistani mangoes is a wise and necessary investment. European retail consumers have been exposed to good eating quality green-skinned Kent and Keitt mangoes for the last 5-6 years. In fact, these cultivars have slowly replaced the red-blushed Tommy Atkins cultivar, which was the standard mango marketed in Europe in the past.

The typical mango procurement relationship between established exporters and Solfruit is the mangoes are purchased f.o.b. destination (i.e. Solfruit pays for the freight cost). Solfruit advances the exporter approximately €1.50 per 4-kg carton at the time of purchase. Another €1.50 per carton is paid at the time of arrival, assuming the fruit quality meets their standards. The remaining market value price of the fruit is remitted to the exporter 45 days later, minus the import charges and handling costs, which amounts to about 10 % of the sales price. A typical total purchase price is in the range of €4.50 per 4 kg carton. The EU mainstream retailers will not purchase air-freighted mangoes due to the excessively high transport cost. Air freighted mangoes will only have a small niche market opportunity in specialty stores. Solfruit is generally not interested in purchasing air-freighted mangoes, although they may be interested in small volumes by air to their clients in Barcelona, Spain. Solfruit indicated they would be willing to start with a few tons by air of Sindhri in late May.

The need for fruit in compliance with EU pesticide maximum residue limits (MRL's) is essential. Thorough pesticide residue analyses determinations must be done prior to marketing of the fruit. Residue violations are unacceptable and further penalized with a disposal fee. This has been a recent problem with imported table grapes from India. Multiple pesticide residue violations have seriously harmed the reputation of Indian table grapes among EU retailers.

Solfruit indicated the period between May through July is typically a good market window for mangoes in Europe. However, August is a slow month because many consumers are on holiday and demand suffers.

#### **5.4 Minor, Weir & Willis**

Minor, Weir, & Willis (MWW) is the second leading mango importer in the UK. They have a range of retail supermarket and wholesale customers. The mango buyer for MWW indicated his company has been purchasing Pakistani mangoes for their wholesale clients for some time. They import an average of 3,000 cartons of Pakistani mangoes per day during the peak of the season. However, all of these mangoes are marketed through wholesale channels. This season, they will be working with Asda (i.e. WalMart) in supplying mangoes to the second leading supermarket chain in the UK. Asda currently has 348 stores in the UK, of which 65 are considered "ethnic" stores. They are located in demographically diverse parts of the main metropolitan areas (i.e. London, Birmingham, and Manchester). The mango buyer for ASDA expressed strong interest in procuring one 40-foot marine container per week of Pakistani mangoes packed in 2-kg open-top cartons for their ethnic stores. The willingness of ASDA to invest in Pakistani mangoes was very positive news. The purchase price (f.o.b. UK) is likely to be in the range of 4£ per 2-kg carton. The suppliers would have to meet ASDA's ethical trading initiative and social responsibility requirements and the packinghouses would have to be audited by an independent third party in order to meet their certification requirements. The MWW-ASDA market linkage represents a major opportunity for the Pakistani mango export industry and should be prioritized by Firms.

#### **5.5 Total Exotics**

Total Exotics is a leading mango importer in Britain and continental Europe. It is in the process of trying to obtain a year-round mango marketing program deal with one or more of the major UK/EU supermarket chains. If this can be achieved, the mango importers for Total Exotics expressed significant interest in receiving product from Pakistan. It is likely they will begin with only smaller volume shipments by air. Firms should build on its past cooperation with Total Exotics and expand the mango export volume this year. The final payment remission terms to Total Exotics from their supermarket clients can be as long as 45 days after arrival of the fruit.

#### **5.6 Univeg-UK**

Univeg is one of the leading mango importers in the UK and has a range of retail supermarket clients, including Waitrose and Marks & Spencer. Univeg was the recipient of the majority of test shipment mangoes from Pakistan to the UK last year. The company received 3 trial shipments by air and 2 marine containers. The results of these trial shipments were discussed by the mango importer with the growers and exporters. Due to the skin discoloration and sub-optimal fruit quality of the marine container shipments after arrival in the U.K., Univeg was hesitant in committing to additional shipments for this season. They will consider smaller volumes of air freighted mangoes

(~1 ton per week) for their specialty store clients, but are not interested in receiving marine container shipments. However, the purchase price (c.i.f. London) will likely be in the range of 4 £ per 4-kg carton. This is the price of Pakistani mangoes in the British wholesale market, which influences the market price for all imported Pakistani mangoes.

Univeg prefers the mangoes arrive in open-top 4-kg cartons, without stickers or fruit wrapping. Ideally, there should be 14-16 uniformed sized fruit in each 4-kg carton. The fruit must have at least an additional week of market life remaining after arrival and should be 70 % yellow-orange color for marketing. The final payment remission terms for Univeg to the exporter are typically 28 days after arrival of the fruit.

### **5.7 Wealmoor**

The mango buyer for Wealmoor, Britain's leading mango importer was unable to make the previously scheduled appointment with the Pakistani delegation. An apology was later offered. It is unclear to what extent Wealmoor will be interested in procuring Pakistani mangoes. Upcoming communications by Firms staff will attempt to jump-start this potentially significant market linkage.

### **5.8 Special Fruit**

The principal of Special Fruit, a leading Belgian mango importer, was not available to meet with the Pakistani delegation at the scheduled time. A prior meeting ran late and an apology was offered. It is unclear to what extent Special Fruit may be interested in procuring Pakistani mangoes.

### **5.9 Univeg-France**

The principal of Univeg-France, a major French mango importer, was not available to meet with the Pakistani delegation at the scheduled time. Although the group waited at length and repeated requests were made, but this was to no avail.

### **5.10 Roveg Fruit**

The principal of Roveg, a leading Dutch mango importer did not show up for the scheduled meeting with the Pakistani delegation. It is not known to what extent Roveg Fruit may be interested in importing Pakistani mangoes.

### **5.11 Grencell Ltd.**

Grencell is one of the leading dried mango product importers in the UK. The firm procures around 200 metric tons of dried mangoes annually, with most of the volume coming from South Africa. The total annual UK market volume for dried mangoes is around 500 metric tons. The average purchase price (c.i.f. London) is around 5.3£ per kg. Typically, the dried mangoes are packed in 2.5 kg in the country of origin, followed

by re-packing in smaller consumer bags after arrival in the UK A 12-month storage life is need for the product, in addition to a thorough microbial analysis prior to exporting for their food safety requirements.

The import manager expressed interest in receiving trial samples of dried Pakistani mangoes for evaluation and market testing. They prefer dried slices between 20-30 mm thick with 13-15% moisture content. Citric or ascorbic acid can be added to the slices to minimize oxidation and discoloration.

Any Pakistani dried mango operation wishing to supply its products to Greencell and their retail supermarket clients must implement a HACCP (Hazard Analysis and Critical Control Point) food safety program and comply with BRC (British Retail Consortium) or IFS (International Food Standard) food safety standards. European supermarket retailers request an independent third party (i.e. Bureau Veritas) to certify the quality and food safety system of the supplier in compliance with BRC or IFS standards.

Continued dried mango product quality work is needed by the potential Pakistani suppliers. Firms should work with the mango growers and agro-processors in training, technical assistance, and drying equipment technology improvements in order to provide consistent supplies of high quality dried mangoes.



# 6. Certifications, Audits, and Forms Required by EU Importers and Retail Supermarkets

In addition to consistent supplies of high quality mangoes, the UK/EU importers supplying mangoes to the retail supermarkets require the growing operations to be GlobalGAP certified. Other certifications or audits may also be required, such as SEDEX and ETI. Individual importers also require the producer to fill out a self-assessment audit, supplier audit, and sourcing questionnaire form.

## 6.1 GlobalGAP

GlobalGAP is a private sector partnership of agriculture producers and European retailers that sets voluntary standards for the certification of production processes of agricultural products around the world. The GlobalGAP standard is primarily designed to reassure consumers about how food is produced on the farm by minimizing detrimental environmental impacts of farming operations, reducing the use of chemical inputs and ensuring a responsible approach to worker health and safety as well as animal welfare. GlobalGAP serves as a practical manual for good agricultural practice (GAP) anywhere in the world.

## 6.2 SEDEX

SEDEX (Supplier Ethical Data Exchange) was formed when a group of UK companies and their major suppliers recognized the need to work together to understand and manage ethical supply chain issues. It is a data sharing system which allows participants to access information from suppliers about labor standards and ethical and responsible business practices. An on-line self-assessment questionnaire and ethical auditing protocol guidance is located on the SEDEX website ([www.sedex.org.uk](http://www.sedex.org.uk)).

## 6.3 ETI

The Ethical Trading Initiative (ETI) is an alliance of companies, trade unions and voluntary organizations that have formed a partnership to improve the lives of workers across the globe. Ethical trade means that retailers, brands and their suppliers take responsibility for improving the working conditions of the people who make the products they sell. Most of these workers are employed by supplier companies around the world, many of them based in lesser developed countries where laws designed to protect

workers' rights are inadequate or not enforced. Companies with a commitment to ethical trade adopt a code of labor practice that they expect all their suppliers to work towards. Such codes address issues like wages, hours of work, health, safety, and the right to join free trade unions.

Many supermarkets in the UK/EU have joined the country's Ethical Trading Initiative in order to demonstrate their commitment to social welfare and environmental standards in their supply chains. They have been particularly concerned to enforce ethical as well as food safety standards in imports from lesser developed countries.

Importers will require a third party ETI/SEDEX audit to be done at each of the GlobalGAP-certified growing and packinghouses operations. The approved auditing bodies in Pakistan acceptable to the UK/EU importers are Bureau Veritas and SGS. The packinghouses will need to maintain records for supply source, postharvest chemical use, and traceability.

#### **6.4 Self-Assessment Audit**

Importers will require a self-assessment audit from the producer. An example of a self assessment audit is included in Annex 1.

#### **6.5 Supplier Audit**

Importers will also require a supplier audit from the producer. An example of a supplier audit is included in Annex 2.

#### **6.6 Sourcing Questionnaire Form**

Importers will require a sourcing questionnaire form to be filled out by the producer. An example of a sourcing questionnaire form is included in Annex 3.

#### **6.7 Pesticide Use and Residue Tolerances**

The UK/EU is very restrictive in the pesticide usage permitted on food crops. The latest list of banned, restricted, and permitted pesticides for mangoes is included in Annex 4. All Pakistani mango growers/exporters must comply with this list or face heavy fines, disposal fees, and/or automatic product detention. Pesticide abuse applications on mangoes are easily detected using gas or liquid chromatography analytical techniques. If a grower/exporter is found to have applied a banned or non-permitted chemical, this is a serious offense and will endanger the reputation and marketability of all Pakistani mango exports. It is imperative that all growers intending on exporting mangoes follow the approved pesticide use list for the specific importing country.

## 7. Planned Export Market Shipments

Lengthy individual discussions were held between each producer, exporter, and Firms mango specialist, Dr. David Picha, about the desired upcoming trial shipments of mangoes to various international destinations in 2011. Each of the producers and exporters were very interested in conducting export market test shipments this season. Each of the stakeholders verbally committed to cooperating with each other and Firms in realizing these test shipments. The following export market destinations were the desired targets for the individual growers/exporters: UK (Roshan), Netherlands (Imtiaz), Canada (Pakhali), Singapore (Mateen, Pakhali, Roshan), Malaysia (Mateen, Pakhali), Indonesia (Tariq), and Iraq (Tariq). Each of these export destinations are logical choices and should be supported by Firms. The initial shipments will include a combination of air and marine container transport modes. Shipments will begin in late May from Sindh with the Sindhri cultivar. The details of the individual stakeholder financial commitments and risks will need to be clearly defined and agreed upon prior to the late May harvest season. The Firms Project will help facilitate these shipments in a cooperative partnership manner. Additional mango export shipments should be coordinated with other exporters not present in Berlin. FirmsProject staff will be working diligently in planning for these test shipments during the upcoming months.

## 8. Recommended Test Shipment Stakeholder Contributions

Each stakeholder in the Pakistani mango sector (i.e. producer, exporter, Firms) should share responsibilities and financial risk in the upcoming mango test shipment trials. The three major expense components in a mango shipment are 1) fruit cost, 2) transport cost, and 3) carton cost. A possible cost sharing scenario would be the grower provides the value of the fruit, the exporter covers the freight cost from farm to export market destination, and Firms provide the cartons, technical supervision, and follow-up arrival quality monitoring of the mangoes at the destination locations. Other cost sharing scenarios are possible and will be defined in the upcoming weeks prior to availability of Sindhri mangoes.

It is recommended the trial shipments begin with a heavy emphasis on the Sindhri cultivar. Prior export shipments of this cultivar have generally gone well. The exporters felt more comfortable in taking financial risks with this cultivar, in contrast to the more delicate S.B. Chaunsa or White Chaunsa, to long distance export markets. Also, in the group meetings with the various mango importers during Fruit Logistica, the interest was in receiving Pakistani fruit as soon as the harvest season begins. Therefore, multiple air and marine container shipments should be facilitated beginning with the Sindhri harvest in Sindh and continuing with the harvest of this cultivar in Punjab. It is anticipated that sufficient fruit volume will be available from GlobalGAP-certified farms having functioning blast chillers and cold storage facilities. Firms-supported test shipments using the marine container mode of transport should only be done from farms having this infrastructure in place.

## 9. CONCLUSION

Opportunities for expanding the export market presence of Pakistani mangoes remain strong. Pakistan can be a significant supplier of mangoes to the mainstream retail supermarkets in the EU. However, it will require a great deal of attention to detail, beginning with improved production practices (better pruned and trained trees, smaller-sized trees, regular preventive maintenance fungicide applications during fruit growth and development, proper harvesting practices, optimal post-harvest care, strong packaging, quick removal of field heat after harvest, maintenance of the cold chain (i.e. 12° C) and high humidity during transport and distribution of the fruit to market.

In order to sell mangoes to the mainstream retailers in Europe, the producers must be GlobalGAP certified and comply with stringent food safety, product traceability, pesticide use, and ethical trading/social responsibility standards.

Mango growers and exporters must continue to make improvements in many of the weak links in the supply chain in order to provide the importers with the required consistent supply of high quality fruit. In addition, using marine containers as transport modes is necessary in order for large volumes of Pakistani mangoes to be marketed at a competitive price in distant mainstream retail supermarkets.

Product promotion and consumer education efforts in the UK/EU destination markets need to be strengthened to increase awareness and consumption of the excellent quality of green-skinned Pakistani mangoes. It will be imperative to develop and financially support a consumer education effort to promote the consumption of green-skinned Pakistani mangoes of excellent eating quality. It will be difficult to ripen Pakistani mangoes to a full yellow-gold skin color following marine container voyages of more than several weeks, which will always be the case in exports to Europe and/or North America made by lower cost sea transport.

Sustainable mango export/import business ventures operate on the basis of confidence and trust. This requires time to develop. The initial years of Firms Project activities will require considerable market development work and confidence-building, not only in product quality, but also in grower-exporter-importer relationships. Currently, the supply chain does not have the necessary confidence and trust level to begin large scale export volume shipments to mainstream retail supermarkets. Growers and exporters must be able to consistently provide high quality mangoes, while importers must remit profitable market price returns to the grower/exporter.

# 10. APPENDIX

## Appendix A: Fruit Logistica and E.U. Mango Marketing Itinerary

Monday February 7

Firms participants arrive at Tegel Airport, Berlin.

Lodging at Holiday Inn hotel.

7:00 p.m. Group meeting and schedule overview.

Tuesday February 8

7:00 a.m. Depart hotel for Berlin Wholesale Produce Market. Wholesale marketing of fresh fruit and vegetables, product quality standards, and packaging requirements.

10:00 a.m. Karstadt supermarket.

11:00 a.m. Metro Cash & Carry wholesale store.

1:30 p.m. GlobalGAP Stakeholder Consultation Meeting.

3:00 p.m. Netto discount supermarket

4:00 p.m. Aldi supermarket.

5:00 p.m. Kaufhaus des Westens (KaDeWe) supermarket.

7:00-12:00 p.m. Group and individual mango export marketing discussions.

Wednesday February 9

8:00 a.m. Depart hotel for Messe Sud Exhibition Center, Fruit Logistica registration.

9:00 a.m. Fruit Logistica Trade Fair opens.

9:30 a.m. Juran Metal Works fruit drying equipment.

11:00 a.m. Bakker Barrendrecht (Netherlands, Germany importer).

1:00 p.m. Total Exotics (UK importer).

2:30 p.m. Solfruit (Netherlands, Germany importer).

4:00 p.m. Greefa (grading, sorting, packing equipment).

6:00 p.m. Trade Fair closes. Return to hotel.

7:00-12:00 p.m. Group and individual mango export marketing discussions.

Thursday February 10

8:00 a.m. Depart hotel for Messe Sud Exhibition Center.

9:00 a.m. Univeg Katope France, (France importer).

10:00 a.m. Natures Pride (importer for Netherlands, Belgium, Norway).

11:00 a.m. GlobalGAP News Conference.

11:30 a.m. Special Fruit (Belgium, Spain importer).

12:00 p.m. GlobalGAP Member Reception.

2:00 p.m. Bayer Crop Science (crop protectants).

3:00 p.m. Minor, Weir, & Willis (UK importer); ASDA supermarket mango buyer.

4:30 p.m. Wealmoor (UK importer).

6:00 p.m. Trade Fair closes. Return to hotel.

7:00-12:00 p.m. Group and individual mango export marketing discussions.

Friday, February 11

8:00 a.m. Depart hotel for Messe Sud Exhibition Center.  
9:15 a.m. Roveg Fruit (Netherlands importer).  
10:00 a.m. Univeg Katope Ltd., (UK importer).  
11:00 a.m. Mr. Pickenpack (Berlin fruit dealer).  
2:30 p.m. Aweta (grading, packing, labeling equipment).  
6:00 p.m. Trade Fair ends. Return to hotel.  
7:00-12:00 p.m. Group and individual mango export marketing discussions.

Saturday February 12

9:00 a.m. Kaiser's supermarket.  
10:30 a.m. Kaufhof supermarket.  
1:00 p.m. Group discussion: EU trial shipments/export market development plans for 2011.  
7:00-12:00 p.m. Group and individual mango export marketing discussions and wrap-up session.

Sunday February 13

A.M. Final individual discussions.  
Initial participant departures from Berlin.

Monday February 14

A.M. Hotel check-out for remaining participants.  
Departure from Berlin-Tegel airport to Pakistan





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