Revisiting the Fruit Industry Development Strategy for Mozambique

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1. Executive Summary

The strategic vision for Mozambique's horticultural sub-sector, notably tropical and sub-tropical fruits was originally prepared in 2003/4, and while the end goals remain the same there have recently been some significant developments that need addressing if these goals are to be reached. Chief among these developments has been the investment in large-scale export banana production in Nampula Province from 2007 onwards, and the more recent discovery of Asian Fruit Fly in some areas of Mozambique. While the Asian Fruit Fly should not prevent the large-scale extra-regional banana exports, it is raising some serious medium-term impediments to the future development of the fruit sub-sector as a whole. The impact of the Asian Fruit Fly on the fruit sub-sector is discussed in this brief report and some recommendations made for the short to medium term and beyond.

Summary of Recommendations

1.1 Asian Fruit Fly (AFF)

Immediate Activities

It is recommended that the project continue to facilitate support activities towards an integrated national response to the challenge and ensure clear communication across all stakeholders.

The project should support establishment of an agreed international protocol for the management of AFF in Mozambique and assist efforts at collaboration with neighbouring countries, notably Zimbabwe and South Africa.

Medium Term – Industry Representation

Industry-wide challenges require a coordinated and professional response. It is therefore recommended that the project promote and facilitate where possible the establishment of a single unified fruit industry association, based on an expansion of Frutisul, but extending this across all Mozambican Provinces and stakeholders. It is suggested that the planned Fruit Conference in Nampula in May could be used as a launch platform for this new organisation. The new association should embrace industry-wide issues, especially compliance with control protocols for significant commercial threats from fruit pest and diseases, and provide a lobbying platform for improvements to policy and legislation that promotes the fruit industry. For example, the persistent high port costs at Nacala port provide a disincentive to investors in fruit exports, and the proposed new fruit industry association could provide a powerful and influential lobbying platform to address this issue. The association should have a membership of all value chain stakeholders with participation of representatives from the public sector and external stakeholders (such as Chiquita etc) as associate members.

1.2 Banana Value Chain

In the Beira Corridor, there should be a pause placed on the project's support efforts to the establishment of any medium to large-scale banana developments until such time as the AFF invoked suspension of trade with Zimbabwe is resolved. AgriFUTURO should publish a clear statement to this effect that also details the steps being taken by the project to assist with resolution of the AFF crisis.

In the Nacala Corridor the project should continue with AFF surveillance coordination.

Investing in new export banana production is only viable at a relatively large scale because of the relatively high capital investment costs required and also because of the technical challenges faced by producers unfamiliar with modern banana production technology. The project should therefore avoid immediate promotion of smallholder engagement in export banana production and look to other possibilities where small and medium-scale investors and producers could have more viable opportunities in a broader banana-based industry. The project should look to examples in Latin America where small and medium scale producers in the production of short-fingered dessert bananas and plantains. In particular, the project should explore with Chiquita the possibility of creating a public good through the introduction of meristem material for relevant varieties of Apple Banana and other novel banana varieties (eg PKZ from RSA) that may have export potential, as well as plantain varieties that may have interest on the local market as a food staple as well as possible process attributes and export trade. It is suggested that the nursery facilities at Matanuska could provide the logistics to receive and grow-on the meristem plantlets and then to establish demonstration plots at Matanuska as well as with other new small to medium-scale investors – several of whom have already begun talks with project staff in Nampula.

1.3 Mango value Chain:

In the Beira Corridor the project should continue with AFF surveillance efforts and push for a rapid return to trade with South Africa and Zimbabwe. The project should also begin immediate efforts at identifying and opening a trade channel with the Gulf States and other export destinations, such as Eastern Europe and the Former Soviet Union. These efforts to include immediate talks with Chiquita and other international buyers active in these markets to explore FOB purchase of the mango crop and/or commission sales to their regular buyers in these countries. The project should seek talks also with Mike Scott of EAM who already has some knowledge and experience of the Gulf markets. The project should also consider a project-funded visit to the Gulf to better understand the specifics of trade demand and to identify new trade opportunities for mango exports..

The project should continue to support the creation and development of a Manica-based private sector mango association that could mutually engage in joint-marketing of the mango crop as fresh and fresh-prepared fruit. The project should assist the industry in scoping the design and costs for a modern packhouse dedicated to fresh mango exports, and further assist the growers in capital raising for this investment and other associated facilities.

In the Nacala Corridor, the project should facilitate the transfer and introduction of certified germplasm of Florida-type mango varieties from the established nurseries in southern Manica to identified new fruit industry investors in Nampula Province.

The project should arrange an early visit to the Umfelozi Agricultural Station where a collection of mango varieties was established historically, with a view to determining the condition and quality of the varieties in the collection. There is the possibility that the collection includes the major Indian varieties such as Alphonso and Totapuri which could create the foundation for a very large long-term export industry focussing on counter-seasonal supply to the Indian market.

1.4 Pineapple Value Chain

The future of the pineapple export value chain in Mozambique is ultimately dependent on the introduction of certified MD2 germplasm. The project should begin discussion with the Ministry of Agriculture regarding the possibility of donor-funding for the introduction of certified MD2 suckers as planting material from recognised foreign production centres, such as Ghana. The funding should include the full costs of the import procedure, as well as the establishment costs for the first plantings through to the successful propagation of clonal plant material (suckers) from the first crop. Alternative funding arrangements could include subsidised sales of the introduced suckers to licensed growers/investors that commit to large-scale propagation of the material and on-sales to private sector investors across Mozambique, but especially in Manica, Sofala, Nampula and Cabo Delgado Provinces. It is possible that co-funding for this exercise could also come from international corporations such as Chiquita and Dole, etc..

2. Background and Purpose

Over the last decade, USAID, partnering with Technoserve, has actively targeted the establishment and development of a large and competitive tropical fruit export industry in Mozambique. That support continues today with some major elements of the AgriFUTURO project and its specific focus on assisting development of the banana, mango and pineapple value chains. The original strategic vision for these value chains was first established in 2003/4, and while the end goals of large-scale tropical and sub-tropical fruit industry development remain the same, there have recently been some significant developments that need addressing if these goals are to be reached.

In the banana value chain there has been rapid and successful establishment of efficient banana production servicing domestic demand but primarily aimed at the South African market. In Nampula Province the very large 3,000 hectare Matanuska investment is growing rapidly and harvesting from the first plantings is already underway, with a further large-scale banana plantation investment at an advanced planning stage for Cabo Delgado. In the mango value chain the scale of Florida-type plantings continues to increase as well as expansion of the industry to several new investors. Harvesting from the early plantings has already led to exports into the high-value South African market for fresh and fresh-prepared mango. However, since 2009 both these value chains have suffered a major marketing crisis because of the invasion into Mozambique of the Asian Fruit Fly (*Bactrocera invadans*). South Africa is free from Asian Fruit Fly (AFF) and is determined to stay that way in order to protect the lucrative and well-established counter-seasonal fruit export industry in that country. If AFF was shown to be present in South Africa then major importing countries with their own fruit production (notably USA and Europe) would sensibly invoke a ban on fruit imports from South Africa. The development strategy for both banana and mango value chains was dependant in its early phases of volume ramp-up on exports to South Africa to bring in an early cashflow and return on the investments, but still pursuing a greater goal of large volume extra-regional exports. The AFF invasion has thus forced the investors to reconsider their financing arrangements and immediate growth plans.

The pineapple value chain has seen an intermittent beginning, largely in the south of Mozambique, with a strategy focussed on the introduction and rapid propagation of the MD2 variety which dominates world trade in the fruit. These early efforts have been seriously set back with the discovery that the introduced MD2 germplasm was probably compromised at its source and the first plantings revealed a mixed progeny of fruit types of varying consistency with typical MD2 characteristics. In addition, it is becoming increasingly clear that while MD2 and other pineapple varieties will grow in the south of Mozambique, there is a potential problem of low night-time temperatures (below 16 C) which affect flowering of the plants and the size of fruits that can be produced for a few months of each year. Recently, Mozambique has been benefitting from the expertise in state-of-the-art banana production that has arisen from the marketing partnership between Matanuska and Chiquita Brands – the global brand leader in bananas. With the banana production expertise has also come pineapple production expertise and with it recommendations that MD2 pineapple investments will probably be best sited further northwards in Manica and Sofala Provinces and above – notably in Nampula and Cabo Delgado.

This report seeks to revisit the original fruit industry development strategy, provide: guidance on modifications to the strategy; recommendations on immediate activities and practical steps that are responsive to these changes in the operating environment; and, next steps for the stakeholders and development supporters.

3. Asian Fruit Fly Impact on Mozambique's Fruit Industry

3.1 Current status and activities

The Asian Fruit Fly (AFF) has been spreading rapidly across East Africa and was first detected in Niassa province of Mozambique in 2007. Since then there have been isolated detections in northern Cabo Delgado (2008), along the main highway from Pemba to Nampula (2009 & 2010), and in Manica Province (2008) at the Vanduzi estate. Since the first detection of AFF the Ministry of Agriculture has led various surveillance, monitoring and management efforts with some measure of success. TechnoServe staff, initially under Emprenda project , and more recently under the AgriFUTURO projects, has been providing some logistics and technical support to the efforts of the Ministry of Agriculture, support which is, and needs to be, ongoing.

The threat of AFF is not to the production of fruit in Mozambique itself but rather the threat to exports of fruit from Mozambique to neighbouring territories that are thus far still free of AFF infestation. South Africa in particular has a major fruit export industry that would be immediately threatened if AFF were ever shown to be present in that country. Zimbabwe had, until the recent decline in its political and economic conditions, a successful fresh produce export industry and is determined to maintain AFF-free status so it's long-term markets are not compromised.

There are several options facing the Mozambique fruit industry in regards to the AFF invasion:-

1. **Surveillance** - continue and expand the surveillance operations according to agreed international protocol and thus establish which geographic areas can be registered as AFF-free zones;

2. **Eradication** – using a combination of crop-applied pesticides and poisoned baits and traps. This is possible but really only likely to be a temporary solution in the face of broad geographic spread and the possibility of wild host plants in untreated areas;

3. **Management of the pest population** - using a combination of pheromone-baited traps, sterile male release programmes and introduction and maintenance of natural predator populations;

4. **Do nothing** – and wait until the AFF has spread to the neighbouring countries on it's own and they can then have no objections to imports from Mozambique.

Option 4 cannot be considered because early regional exports are an important tactic in the industry development strategy. Option 2 is possible in some isolated areas such as Vanduzi Estate where eradication measures have shown to be successful thus far, but not a feasible option for broader areas. Option 1 is essential in any case because without surveillance there can be no knowledge of the status of the invasion and any importing country will demand to see a consecutive history of negative surveillance before even considering the entry of fruits. Option 3 is really only a long-term tactic to ensure potential hot-spots of infestation are not allowed to develop and spread.

With Zimbabwe and South Africa adopting a rigid response to the threat of AFF invasion and spread it is important that the Ministry of Agriculture in Mozambique continues to be seen to be leading a professional campaign that is wholly open to and supported by international protocols, and that additional assistance is sought from leading international agencies such as the APHIS programme of the USA. In regards to the recent insistence by the Zimbabwe

authorities for an expensive Zimbabwean supervision of the AFF surveillance and management in Mozambique it is suggested that adoption of the international protocol is the first step and that Zimbabwe have observer status only rather than management status, with a reciprocal agreement that Mozambican observers be allowed to monitor the AFF surveillance activities in Zimbabwe. It would probably beneficial to all if the US APHIS programme could be persuaded to also have observer status in case of the need for any arbitration in the process.

3.2 Recommendations

Asian Fruit Fly (AFF) - Immediate Activities:

While the AFF threat was not anticipated at the time the AgriFUTURO programme was designed and it has no specific dedicated budget to manage or control the infestation, there are still some things that the project can assist with. It is recommended that AgriFUTURO continue to facilitate support activities towards an integrated national response to the challenge, led by the Ministry of Agriculture, and to help ensure clear communication across all stakeholders. Beginning with the planned consultation for late March, AgriFUTURO should support where possible the establishment of an agreed international protocol for the management of AFF in Mozambique and collaborate with neighbouring countries, notably Zimbabwe and South Africa.

AFF – Medium Term – Industry Representation

Industry-wide challenges require a coordinated and professional response. AgriFUTURO should promote and facilitate where possible the establishment of a single unified fruit industry association, based on an expansion of Frutisul but extending this across all Mozambique Provinces and stakeholders. The project should use the planned Fruit Conference in Nampula in May as a launch platform for this new organisation. The new association should embrace industry-wide issues, especially compliance with control protocols for significant commercial threats from fruit pest and diseases, and provide a lobbying platform for improvements to policy and legislation that promotes the fruit industry. The association should have a membership of all value chain stakeholders with participation of representatives from the public sector and external stakeholders (such as Chiquita etc) as associate members.

4. The Banana Value Chain

4.1 Assessment of current status and on-going projections

(a) Beira Corridor

With funding from USAID, TechnoServe has, since 1999, been actively prospecting for potential large-scale export banana areas in the Beira and Nacala Corridors . Initially, the most favourable location appeared to be the old Lonrho Metuchira site in Sofala but more careful assessment of this area showed very low night-time temperatures (below 10 C) which effectively ruled this area out and further explorations were, by necessity directed northwards into the wholly tropical zone of the Nacala Corridor. However, more recently, some areas within northern Manica have been found with a distinct microclimate that favours banana production. This discovery coincided with the final collapse of the banana industry in Zimbabwe and a clear export opportunity was presented to growers in Manica Province. Several

medium-scale banana plantations have been developed with excellent fruit yield and quality and some initial exports were made into Zimbabwe in 2009 just before the discovery of the Asian Fruit Fly presence. The Zimbabwe authorities have since closed their border with Mozambique in respect of fresh banana trade and the newly-established Manica banana growers are now faced with a closure of their main market.

Where previously the AgriFUTURO project was able to promote banana planting for export, the abrupt market closure means that any continued promotion would be inadvisable unless the market can be re-opened or a new market identified for the fruit.

(b) Nacala Corridor

In the last four years, the Matanuska consortium, assisted technically by the global resources of their international marketing partner Chiquita, have successfully established the large dam and necessary support infrastructure for a 3,000 hectare export banana plantation in Nampula Province. While planting must continue at pace for some months to come yet, several harvests have already been taken and the fruit exported to the Gulf, principally Iraq and Iran. This is a major milestone in the overall export fruit strategy for Mozambique because, at a stroke, the sea freight connection to extra-regional markets was opened – a significant development that should now encourage still further investment in large-scale export banana production, as well as the very real possibility of large-scale mango and pineapple exports. At the time of the consultant's visit, some new large-scale areas were being surveyed in Cabo Delgado by a Mozambican consortium led by CETA.

The AFF discovery has presented some initial challenges to the Matanuska consortium investors because their initial strategy was to market the first harvests in the South African markets. Fortunately, the Matanuska team quickly established a network of pheromone fly traps that proved the absence of AFF in their plantation and thus direct shipping of banana to Durban and Capetown can still be a possibility.

The high level of capitalization and sophisticated logistics now being directed at large-scale export banana production in the Nacala Corridor demands specialist professional and commercial resources and is best left to the private sector to get on with most efficiently. At the onset of the AgriFUTURO project it was considered a possibility for some organised smaller growers to establish additional export banana planting on 5 to 50 hectares. However, it is now clear that the capital costs needed for even such relatively small investments in export banana production are well beyond the means of the current generation of small and medium-scale growers in Mozambique. However, there is still the possibility of smallholders investing in other types of banana production, notably the small-fingered Apple banana which is already recognised by the local market and has significant export possibilities too. In other parts of the world where export banana production has been long established, exporters have been successful in assisting smallholders in the producing and accessing the export markets. While Apple banana is rather sensitive to Sigatoka disease there is very little disease inoculum present in the Nacala Corridor and appropriate management strategies should allow its profitable production by smallholders on mini-plantations where some irrigation can be installed.

A further "banana" possibility could be plantain production for the local and possibly export markets. On a local level, plantain could become an important food staple crop in the area, especially now that large numbers of workers on the Matanuska plantation will need feeding on a daily basis. In Latin America, where bananas and

plantains are a regular part of the diet, families are able to set up mini processing businesses where plantain is peeled, sliced, fried and simply packaged in plastic bags for sale as an attractive snack item.in urban areas and at major transport hubs. Cllearly the introduction of plantain as a wholly new crop should be approached carefully but the project could assist with germplasm introduction and establishment as well as developing demonstration plots and process businesses. The highly disease resistant FHIA plantain clones should be looked at as well as the more traditional Horn Plantain types.

4.2 Options for further development and recommendations

(a) Beira Corridor

In the Beira Corridor, there should be a pause placed on the project's support efforts to the establishment of any medium to large-scale banana developments until such time as the AFF invoked suspension of trade with Zimbabwe is resolved. AgriFUTURO should publish a clear statement to this effect that also details the steps being taken by the project to assist with resolution of the AFF crisis.

(b) Nacala Corridor

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Investing in new export banana production is only viable at a relatively large scale because of the relatively high capital investment costs required and also because of the technical challenges faced by producers unfamiliar with modern banana production technology. The project should therefore avoid immediate promotion of smallholder engagement in export banana production and look to other possibilities where small and medium-scale investors and producers could have more viable opportunities in a broader banana-based industry.

The project should look to examples in Latin America where small and medium scale producers in the production of short-fingered dessert bananas and plantains. In particular, the project should explore with Chiquita the possibility of creating a public good through the introduction of meristem material for relevant varieties of Apple Banana and other novel banana varieties (eg PKZ from RSA) that may have export potential, as well as plantain varieties that may have interest on the local market as a food staple as well as possible process attributes and export trade. It is suggested that the nursery facilities at Matanuska could provide the logistics to receive and grow-on the meristem plantlets, and then to establish demonstration plots at Matanuska as well as with other new small to medium-scale investors – several of whom have already begun talks with project staff in Nampula.

5. The Mango Value Chain

5.1 Assessment of current status and on-going projections

(a) Beira Corridor

The consultant was not able to visit the Dombe area of Manica Province, where the only significant mango plantings have been made, during the very brief visit to Mozambique, but was able to meet with one of the investors learn about general developments from the project staff. Expansion of the planted areas has been steady

and comparatively slow, but progress is indeed being made and export volumes to the South African processors (Bakkavor) have continued to rise and demand for the product remains very strong. However, just as some of the new investors were looking to begin another cycle of new planting the AFF invasion has effectively closed off their main market for the fruit and investor confidence is now rather low. Re-opening of the South African border to mango exports will only be possible if the Dombe area can demonstrate that it is AFF-free on the basis of a series of zero-trapping of the fly over several months.

Now that there are regular refrigerated containers of bananas now being shipped from Nacala to the Gulf, it might be possible to open up a whole new market for the fruit that was not previously considered. One of the investors (Mike Scott) already has some experience of exporting mango and citrus to the Gulf from South Africa. With Mozambican mango production being counter-seasonal to India and Pakistan, the main suppliers of mango to the Gulf markets, it should be possible to gain entry and establish some regular trade quite quickly. In addition, Chiquita have been successfully marketing bananas, pineapples and other fruits, on a large-scale, into the Gulf for many decades and might be interested in providing the transport logistics from Nacala to the Gulf and then either taking title of the fruit or arranging slaes on a commission basis.

Now that there is a proper bridge across the Zambezi trucking of containers from Dombe up to Nacala needs to be investigated before any shipping trials could begin, but the project is well-placed to assist with this research and could also provide an introductory link between the mango producers/exporters in Dombe and the Chiquita staff in Nacala and Nelspruit. The consultant was able to discuss the Gulf option with Mark Hassenkamp, the Managing Director of Chiquita Africa and the idea was warmly received.

(c) Nacala Corridor

The Nacala Corridor has excellent conditions for the large-scale planting of export mango, provided that suitable water-harvesting can be accomplished and irrigated plantations established There are currently no organised plantings of mango in the Nacala Corridor of any significance beyond immediate local sales, but the ongoing economic development of the Corridor is beginning to inspire many small to medium landowners to invest in some form of horticultural production. The consultant met with several such potential investors during the brief visit to Nampula, most of whom already had good irrigation potential installed in the form of permanent surface water features and wells, but were uncertain as to which crops might best be invested in.

Several already have some fruit production experience and are regular suppliers to the local markets in the Corridor. For those landowners with irrigation already in place there is the possibility to engage in planting of several different fruit types, especially mango, Apple banana, and pineapple. However, one of the constraints is the lack of reliable planting material and this is one area where the project could provide valuable assistance, as well as providing the usual guidance and help in creating bankable business plans and access to credit.

5.2 Options for further development and recommendations

(a) Beira Corridor

In the Beira Corridor the project should continue with AFF surveillance efforts and push for a rapid return to trade with South Africa and Zimbabwe. The project should also begin immediate efforts at identifying and opening a trade channel with the Gulf States and other export destinations, such as Eastern Europe and the Former Soviet Union. These efforts to include immediate talks with Chiquita and other international buyers active in these markets to explore FOB purchase of the mango crop and/or commission sales to their regular buyers in these countries. The project should seek talks also with Mike Scott of EAM who already has some knowledge and experience of the Gulf markets. The project should also consider a project-funded visit to the Gulf to better understand the specifics of trade demand and to identify new trade opportunities for mango exports.

The project should continue to support the creation and development of a Manica-based private sector mango association that could mutually engage in joint-marketing of the mango crop as fresh and fresh-prepared fruit. The project should assist the industry in scoping the design and costs for a modern packhouse dedicated to fresh mango exports, and further assist the growers in capital raising for this investment and other associated facilities.

(b) Nacala Corridor

In the Nacala Corridor, the project should facilitate the transfer and introduction of certified germplasm of Florida-type mango varieties from the established nurseries in southern Manica to identified new fruit industry investors in Nampula Province.

The project should arrange an early visit to the Umfelozi Agricultural Station where a collection of mango varieties was established historically, with a view to determining the condition and quality of the varieties in the collection. There is the possibility that the collection includes the major Indian varieties such as Alphonso and Totapuri which could create the foundation for a very large long-term export industry focussing on counter-seasonal supply to the Indian market.

6. The Pineapple Value Chain

6.1 Assessment of current status and on-going projections

Pineapple is grown all over Mozambique but almost all plantings are on a small-scale and with non-commercial varieties. The MD2 variety developed by Del Monte has now become the leading clone for almost all export trade globally because of its superior agronomic performance, improved post-harvest performance when a cold chain is installed, but mostly because of outstanding consumer preference for its rich golden yellow flesh, excellent flavour with high sugars and moderate acid balance. Some planting materials alleged to be MD2 were imported into Mozambique from South Africa, but it was only after these were planted out and the plants fully-developed that it became clear they were of somewhat mixed provenance and the source was thus discredited. Growers in South Africa have made many attempts to grow the MD2 variety but the cool winter conditions prevent adequate production. The initial plantings of the alleged MD2 in Mozambique were all made in the south of the country but were still judged to be superior to South African production.

The market potential could begin with immediate local and regional sales, with the South African market being easily the most attractive. Extra-regional market possibilities exist in the Gulf where almost all the supply has been traditionally shipped from the Philippines and other South East Asian sources. With burgeoning demand in the Far East markets, notably

China, the traditional supply sources may not prove reliable I future and newer supply areas closer to the market should be able to obtain significant market share.

Now that Chiquita technicians are based in Nampula Province assisting Matanuska in the banana plantation they have been able to assess the suitability of the area for pineapple as well as banana and are confident that MD2 pineapple could be a major new export crop for northern Mozambique, possibly in the Beira and the Nacala Corridors. However, before any investor can seriously consider jumping into large-scale planting there is a need to import authentic germplasm of the MD2 variety and to have some initial commercial trials established from which future planting material can be propagated on a large-scale.

6.2 Options for further development and recommendations

The future of the pineapple export value chain in Mozambique is ultimately dependent on the introduction of certified MD2 germplasm. The project should begin discussion with the Ministry of Agriculture regarding the possibility of donor-funding for the introduction of certified MD2 suckers as planting material from recognised foreign production centres, such as Ghana. The funding should include the full costs of the import procedure, as well as the establishment costs for the first plantings through to the successful propagation of clonal plant material (suckers) from the first crop. Alternative funding arrangements could include subsidised sales of the introduced suckers to licensed growers/investors that commit to large-scale propagation of the material and on-sales to private sector investors across Mozambique, but especially in Manica, Sofala, Nampula and Cabo Delgado Provinces. It is possible that co-funding for this exercise could also come from international corporations such as Chiquita and Dole, etc..

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