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**Kenya Horticultural
Development Program 2004-2010**

**Market Opportunities
for Mango Growers**

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USAID-Kenya Horticulture Development Program Key Facts

- 60,000+ beneficiaries in rural areas
- Mombasa, Kibwezi, Kisumu, Eldoret, Nanyuki, Thika, Nairobi
- 800 on-farm demonstrations and 60,000 clients
- 78 partners – 8 public sector, 57 for-profit companies and 13 local NGOs
- Product and market development of more than 20 cash and food crops
- Standards compliance for 10,000+ smallholder growers

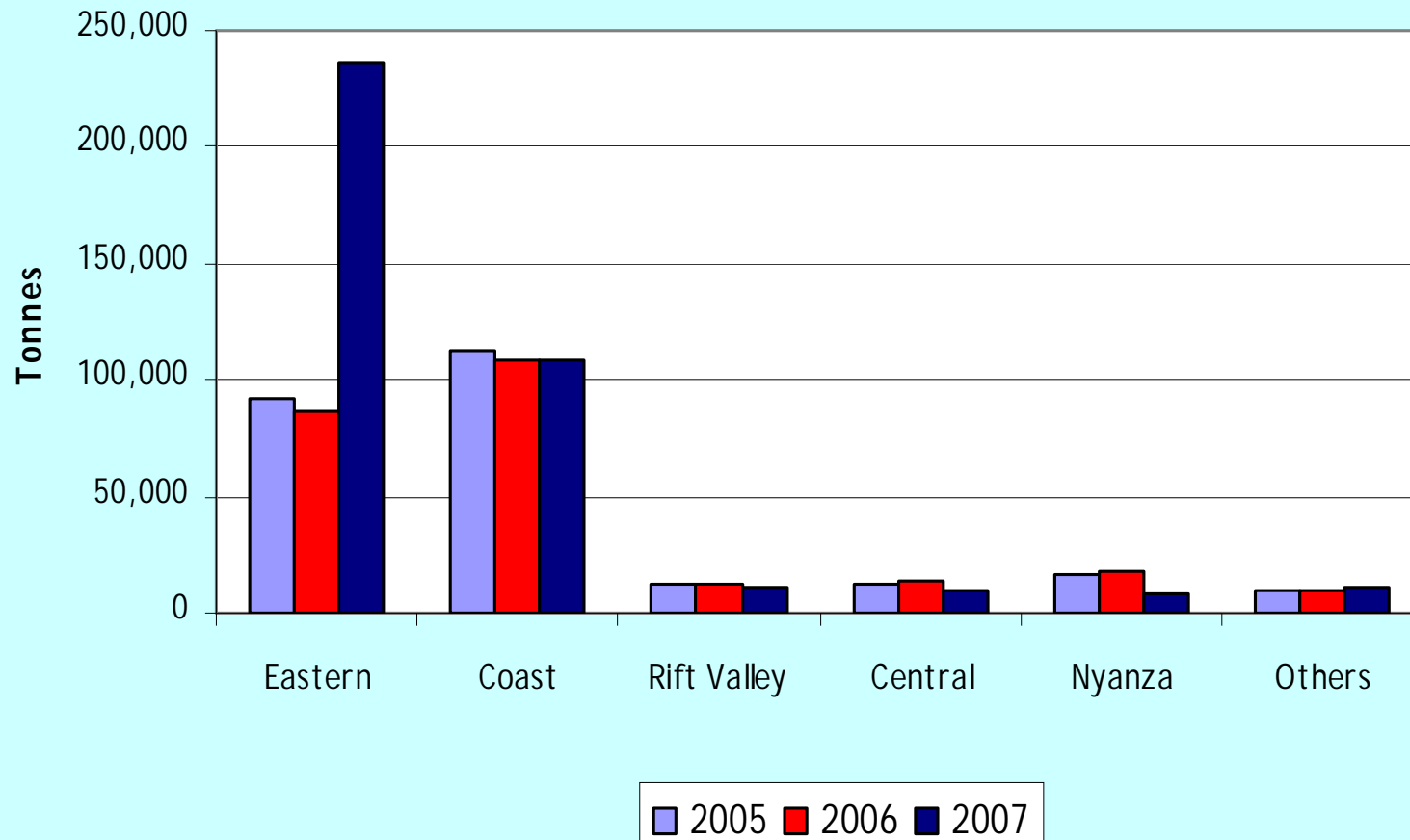
Mango Interventions

- Collection centres at the Tana River
- Improved post-harvest systems
- Semi-processing to produce frozen pulp
- Small-scale aseptic packaging
- Dried mango expansion
- Feasibility Studies
- Market information

Mango Marketing Facts

- National production increasing
- Local and regional markets for fresh mango well supplied already
- Local market prices have peaked
- Large-scale air freight exports of fresh mango to Europe not feasible
- Massive and increasing domestic, African and global demand for mango juice
- Insufficient fruit for existing fruit processing facilities
- Processors cannot pay more than Ksh10-12/kg to compete with imports or export to world markets

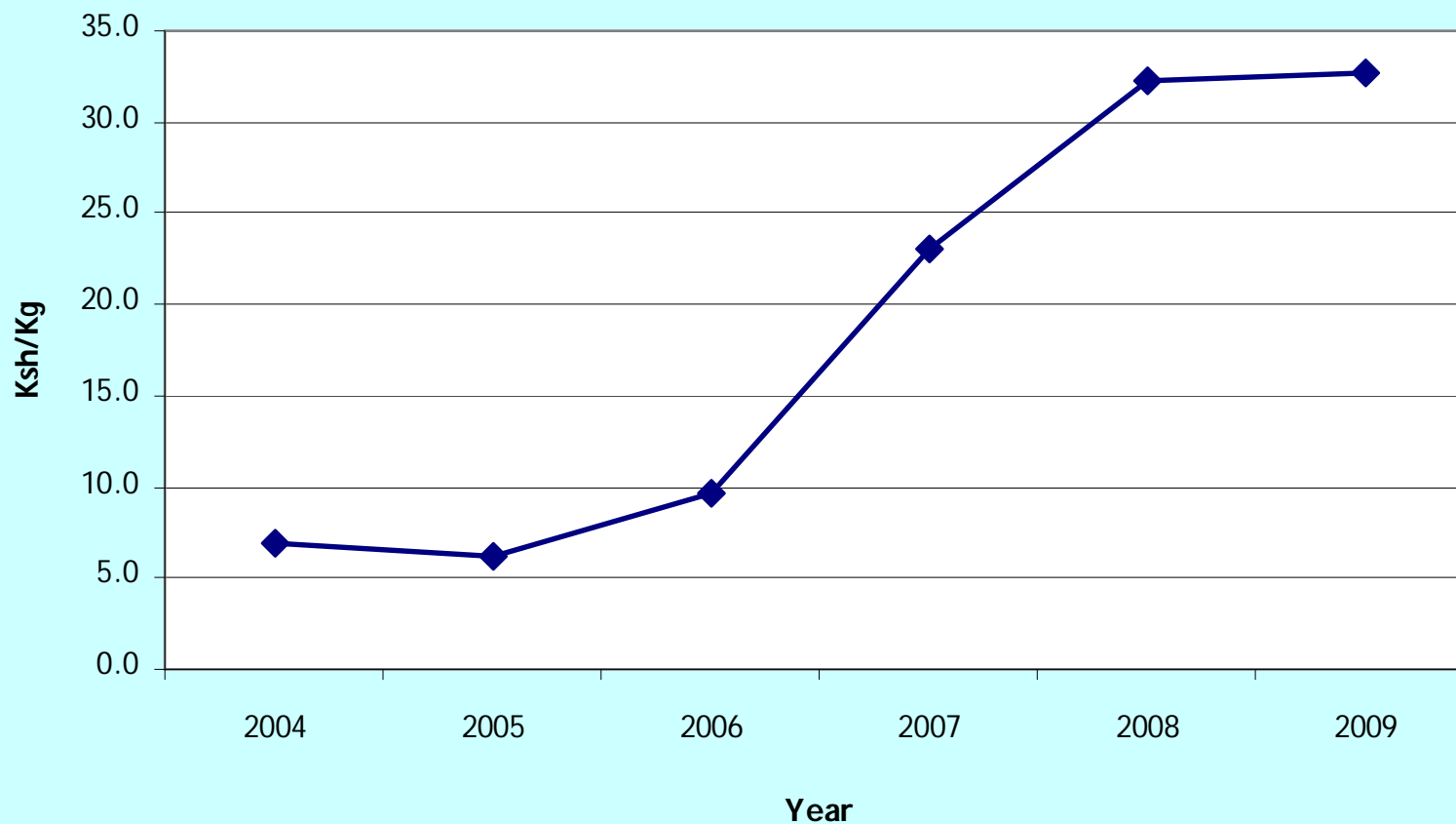
Mango Production by Province





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Annual Average Mango Prices



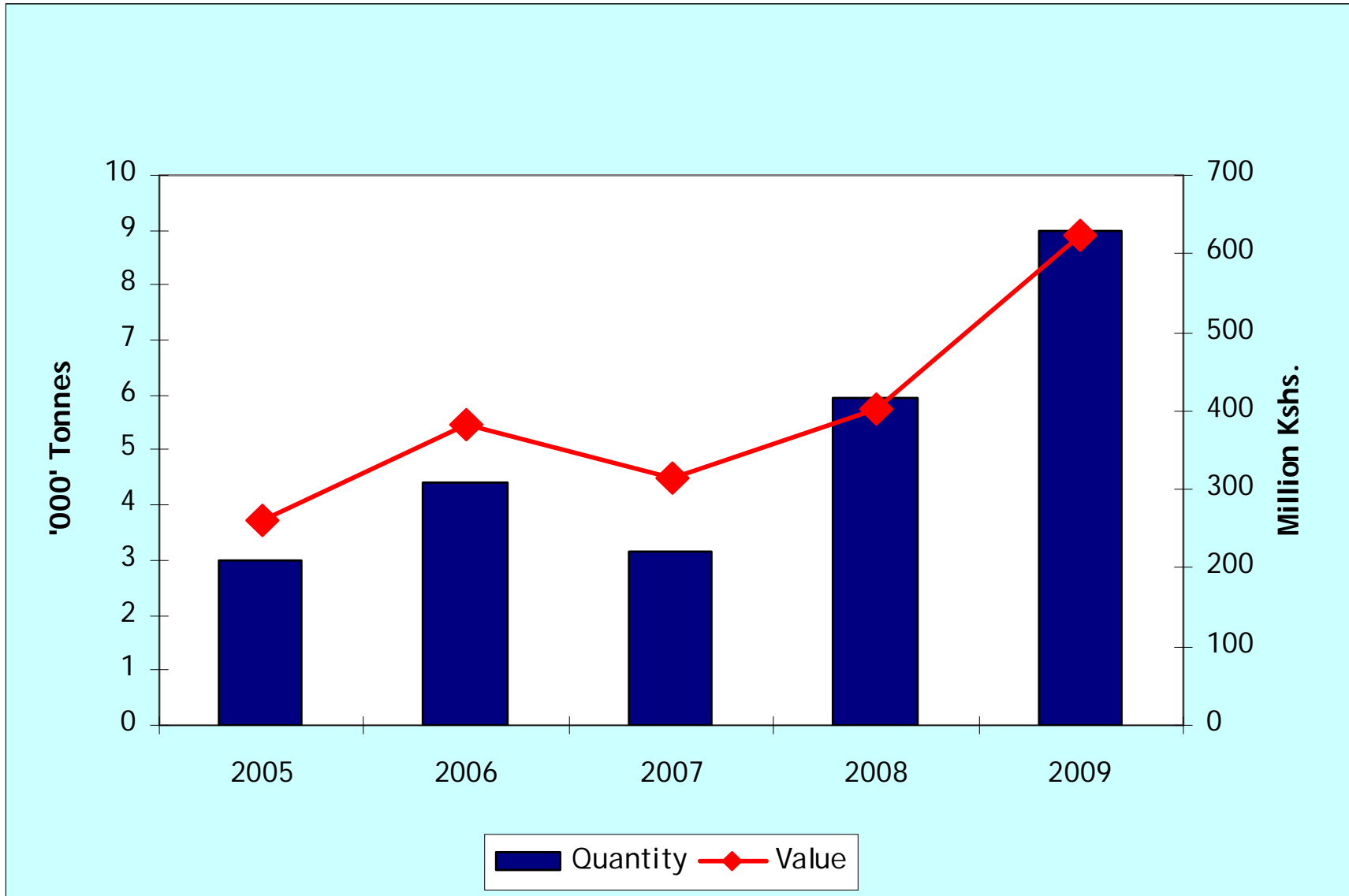
Kenya's Comparative **Disadvantages** in Mango Production and Marketing

- Many varieties but limited production of internationally-known types
- Scattered production often in remote areas
- Bad roads, expensive logistics, high wastage
- High levels of black spot from fungal diseases
- Mango weevil
- Inefficient port and problematic sea freight

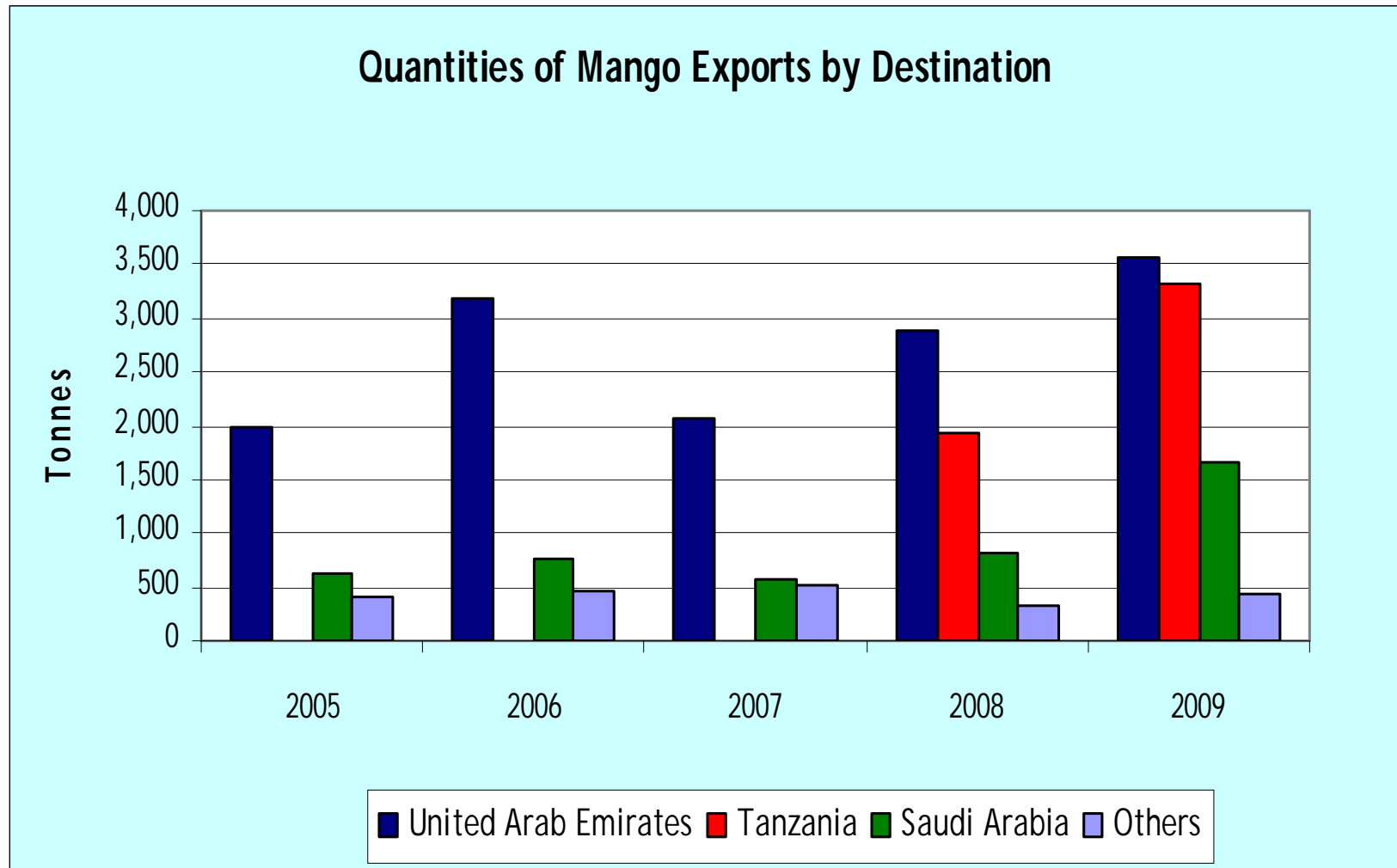
Kenya's Comparative **Advantages** in Mango Production and Marketing

- Excellent **almost year-round** production conditions
- More than 400,000 tons already being produced and increasing
- Kenya is **already a small-scale exporter** of mango
- 100,000 tonnes of **Ngowe mango** available for processing
- Strong local markets and proximity of Gulf markets for fresh fruit
- Substantial **recent investment** in fruit juice processing facilities
- Established **global marketing capability** of export companies
- **Pineapple and passion fruit** juice also available for buyers
- Kenyan processed pineapple from Del Monte **already well-known**
- Excellent **private sector support services** available

Kenyan Fresh Mango Exports



Kenyan Export Markets for Fresh Mango

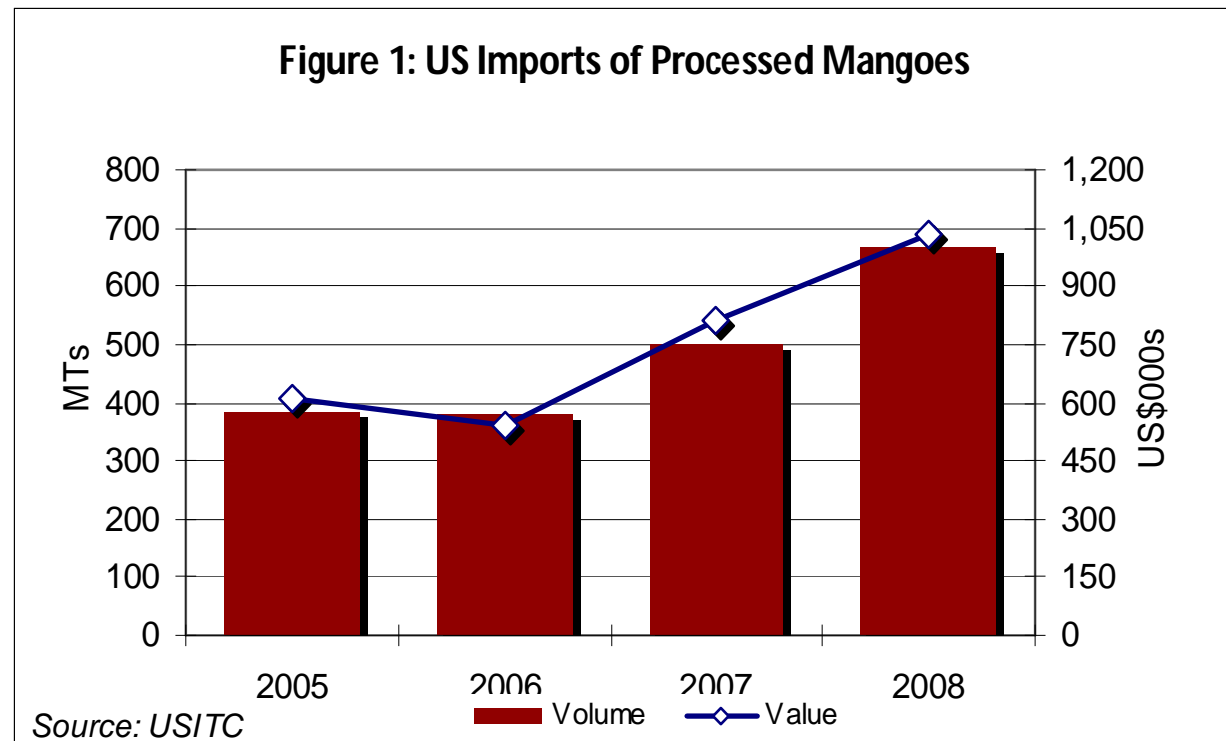


Other Mango Products

- Dried mango confectionery products
- Dried mango chips as a food ingredient
- Green mango in brine or vinegar for processing
- Jams, preserves, chutneys
- Mango seed oil for cosmetics

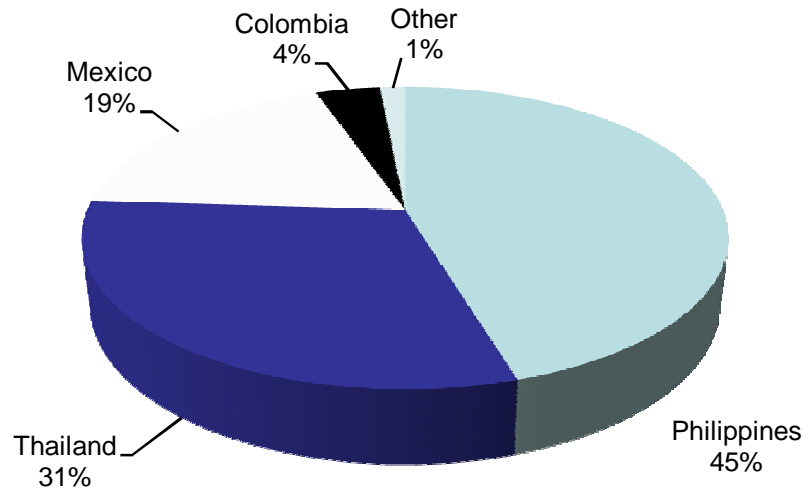
New Product Example 2: US Market for Mango preserved in vinegar

- Total US imports (2008) - 700 tonnes
- Value \$1+ million
- Potential limited



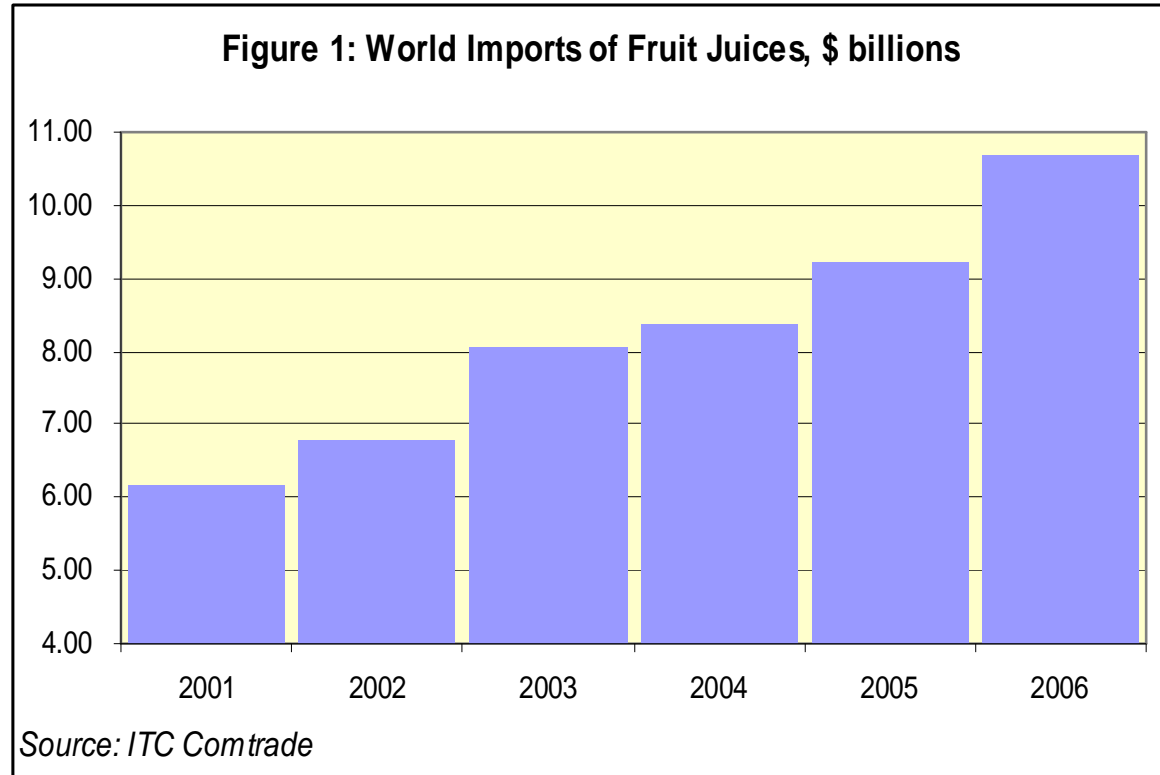
New Product Example 1: US Market for Dried Mango

- Total US imports (2008) - 3,481 tonnes
- Value \$10+ million
- Potential low-medium



New Product Example 3: Global Market for Fruit Juice Concentrate

- Total imports (2006) – 5+ million tonnes
- Value \$11+ billion
- Potential huge



Conclusions

1. Primary market development should be on mango concentrate for juice production for local, African and global markets
2. Secondary focus necessary to maximise domestic market consumption
3. Third market focus should be on fresh fruit to the Gulf markets
4. Fourth market focus should be on dried fruit products
5. Increase production of Ngowe and other processing varieties
6. Create intensive public-private technical support systems for growers and processors to become competitive by reducing costs of production