

Global Trade in Mangoes

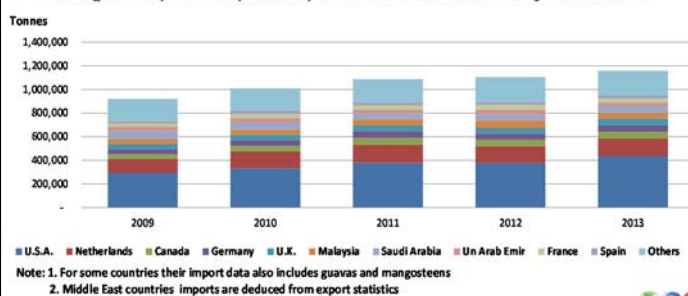
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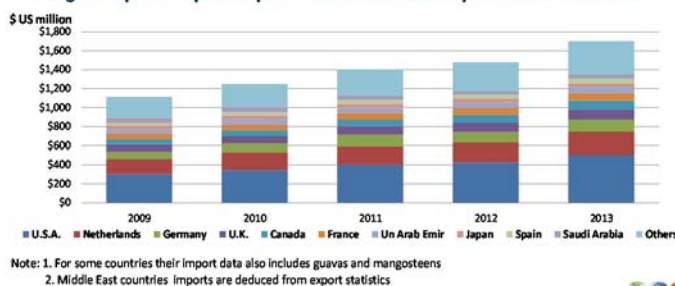


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Mangoes Imports - top ten import countries with monthly information

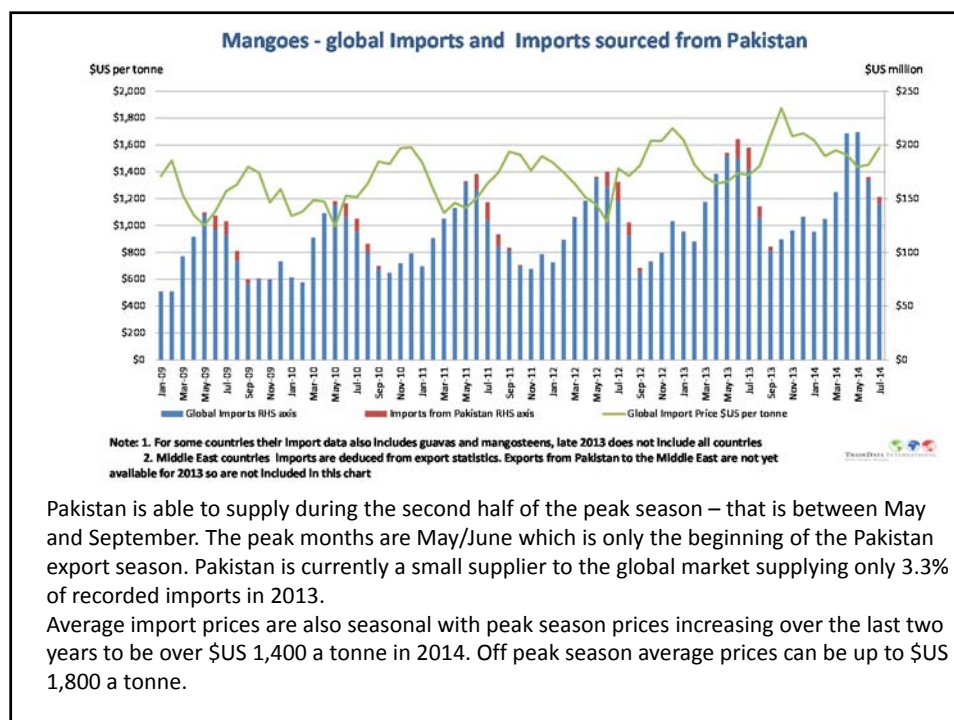
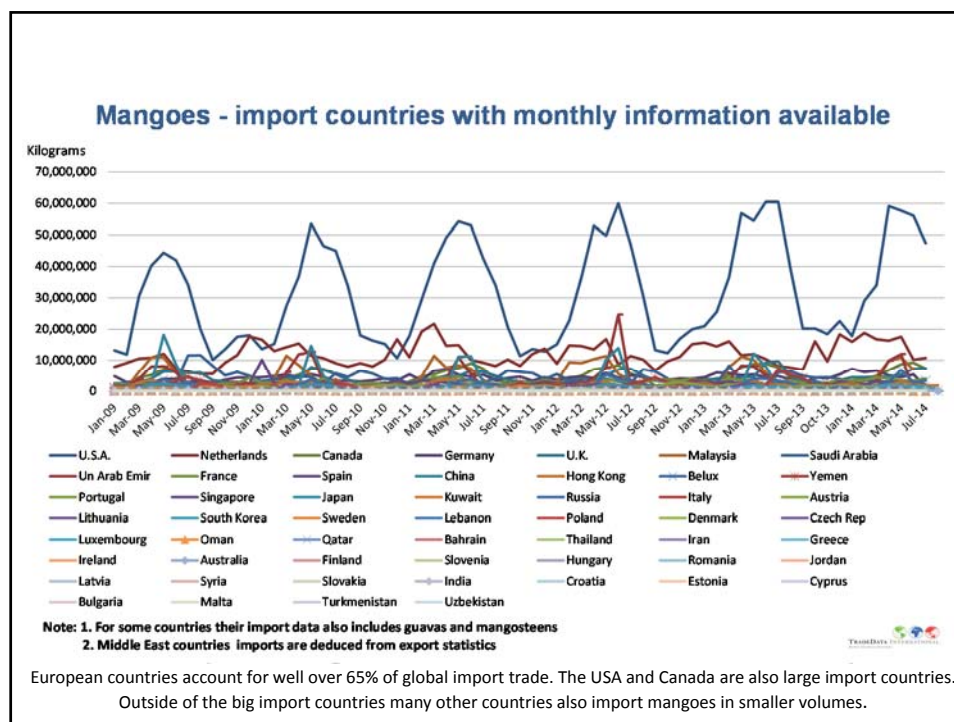


Mangoes Imports - top ten import countries with monthly information available

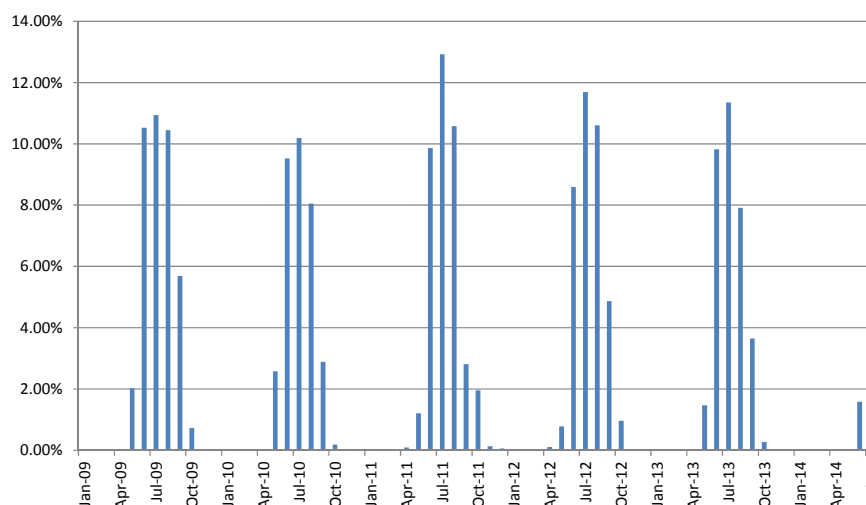


COUNTRIES WITH MONTH IMPORT STATISTICS

1. The global market is just under 1.2 million tonnes and \$US 1.7 billion. Global trade is growing steadily
2. Middle East Countries do not release import statistics – imports into these countries is measured as exports from the major export countries to the Middle East
3. Values are increasing faster than quantities thus average prices are increasing



Pakistan Share of the Global Mango Market

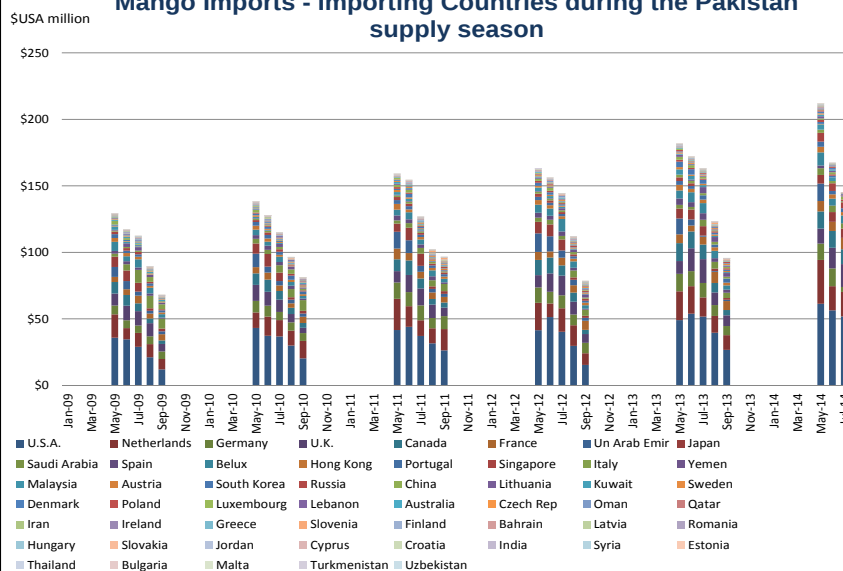


During the peak three months of the Pakistan season Pakistan has a significant share of global trade. Pakistan share of the global market has fallen somewhat in 2012 and 2013.

Please Note: 2014 data is not a full allotment of countries.



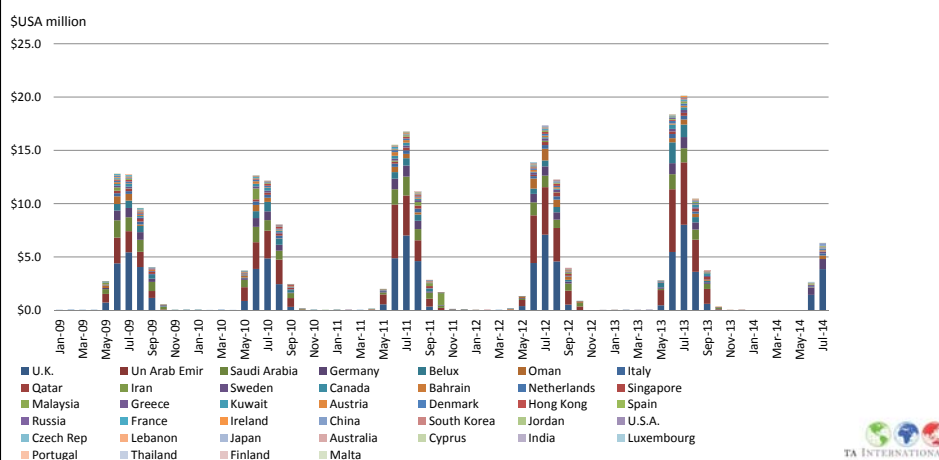
Mango Imports - Importing Countries during the Pakistan supply season



Globally the market declines as the Pakistan supply season progresses. The largest market (by far) is the USA. However there are many other potential markets for Pakistan. Note: during the Pakistan supply season import volumes are increasing over time.



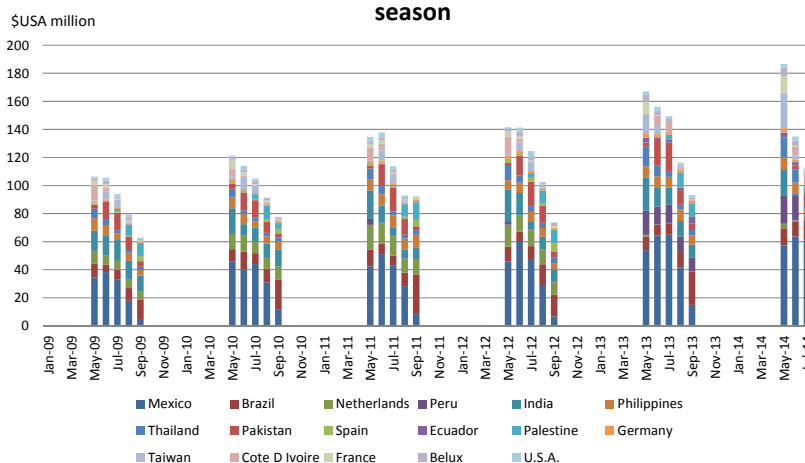
Mango Imports sourced from Pakistan



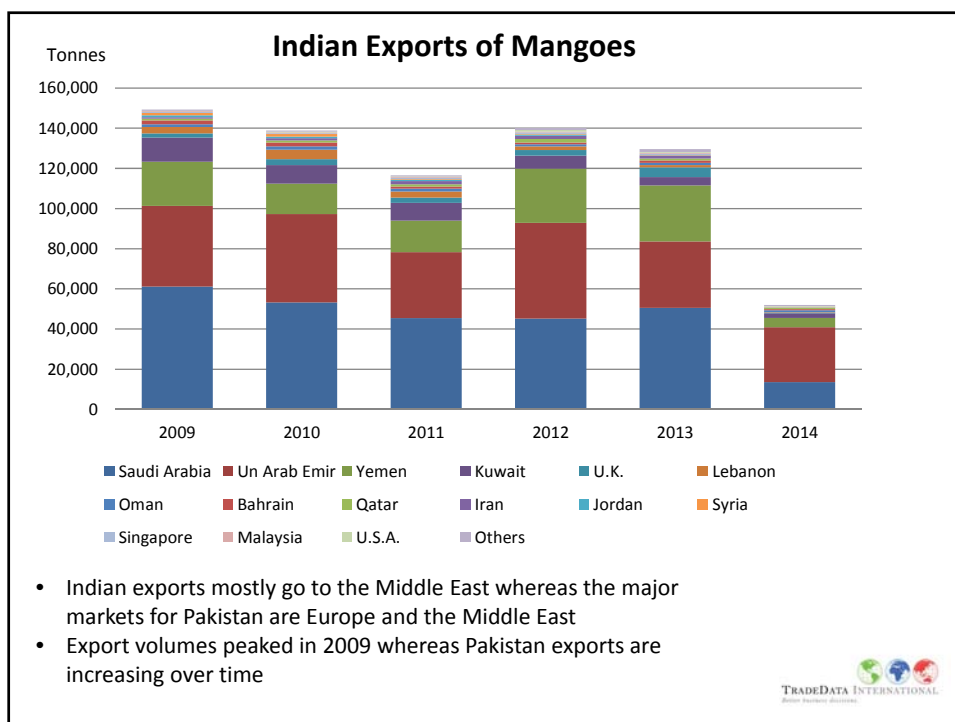
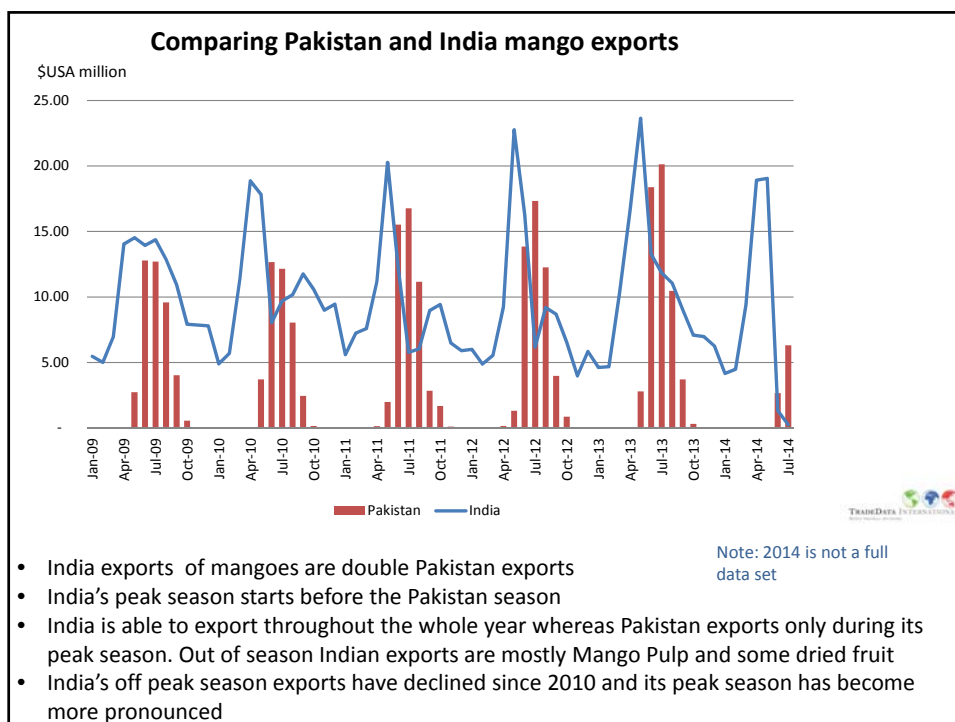
Pakistan mangoes mostly go to UK , UAE and to a lesser extent elsewhere in Europe and the Middle East. The largest market – the USA – is not currently a major markets for Pakistan. China is also not a significant market for Pakistan.

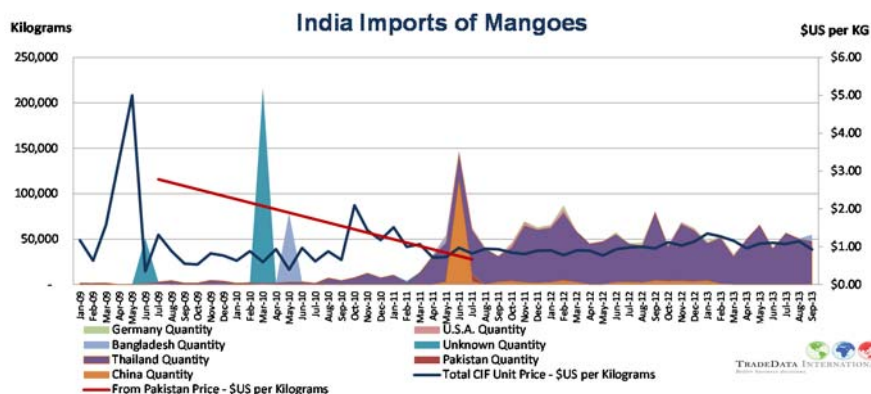
Please Note: 2014 is not a full allotment of countries.

Major mango export countries during Pakistan supply season



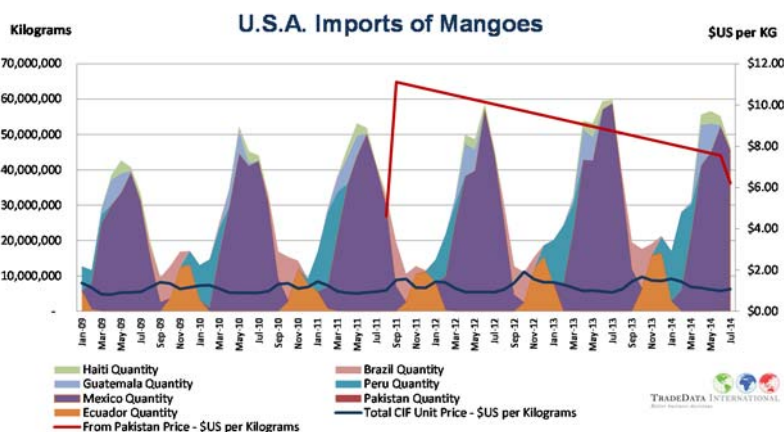
The major export countries during the Pakistan supply season are from Central and South America, India, South East Asia and Europe. Mexico is by far the largest exporter and Pakistan is relatively small exporter. Note the Netherlands as an export country – presumably they first import from elsewhere and then distribute into Europe.





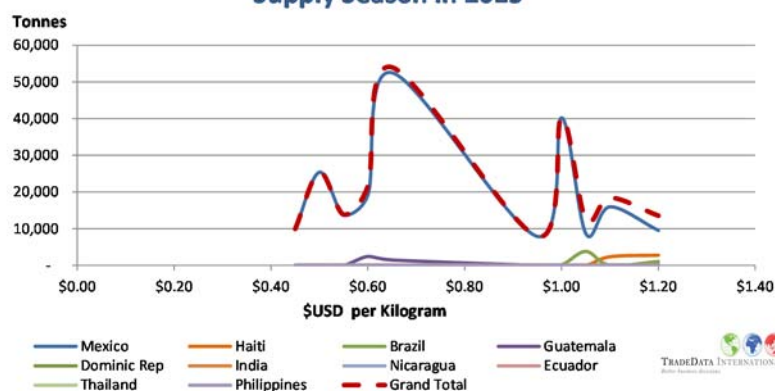
India imports only small volumes of mangoes and mostly from Thailand and at prices around \$US 1 per KG.

Thailand is able to supply reasonably constant volumes across the whole year.



USA mango imports are highly seasonal. Peak season imports mostly come from Mexico between March and September. Before the Mexico peak season imports arrive from Peru, Ecuador and Guatemala and after the Mexico peak season from Brazil. There were three small shipments from Pakistan in August and September 2011 and again in June 2014 before a larger shipment of 40.5 tonnes in July 2014. Imports from Pakistan are at relatively high prices. On average mangoes arrive in the USA at just over \$US 1 per KG.

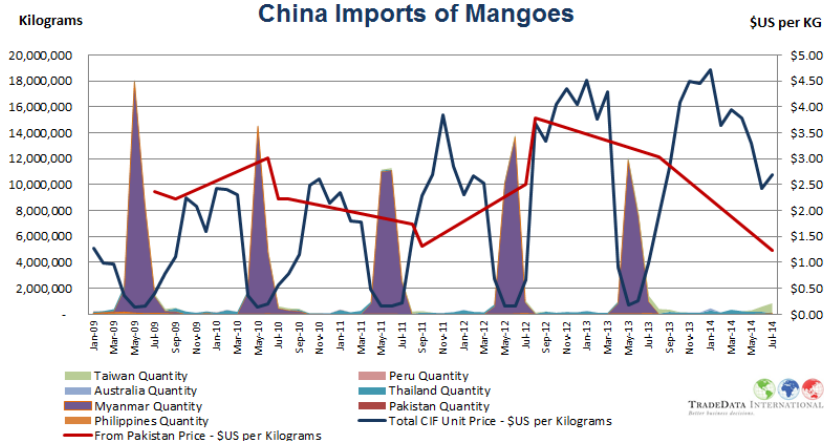
Price Histogram - U.S.A. Imports of Mangoes during the Pakistan Supply Season in 2013



During the Pakistan supply season Mangoes arrive from Mexico into the USA at two price points from \$US 0.50 to \$US 0.80 per KG; and at and just over \$US 1.0 per KG with the majority of fruit at prices between \$US 0.60 and \$US 0.80.

Brazil and Haiti sell much lower volumes to the USA around \$US 1.10 per KG

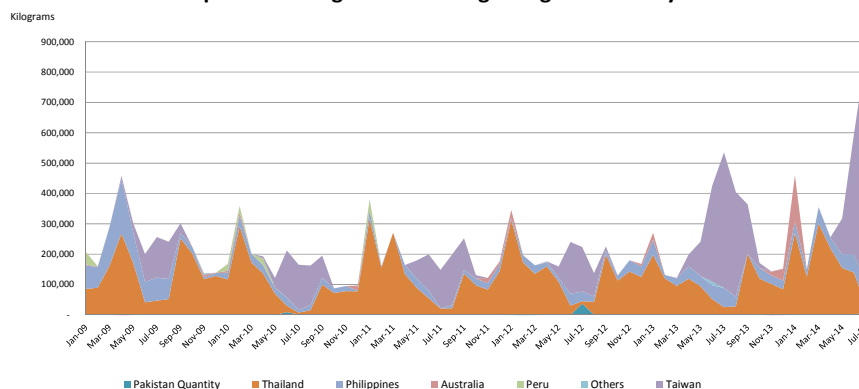
China Imports of Mangoes



China imports of mangoes are dominated by imports from Myanmar at very low prices. Myanmar is a seasonal, large and extremely low price supplier to China. Prices from Myanmar are around \$US 0.15 per KG. These very low prices and high volumes suggest there may be some bi-lateral arrangement here – maybe exchanging Mangoes for some other product – the price here is only 15% of other shipments – maybe (only guessing) just covering transport costs. However this arrangement ended in 2013 as not found in 2014 imports.

Pakistan is a small and irregular supplier at far higher prices than Myanmar and supplies during the months that Myanmar does not supply.

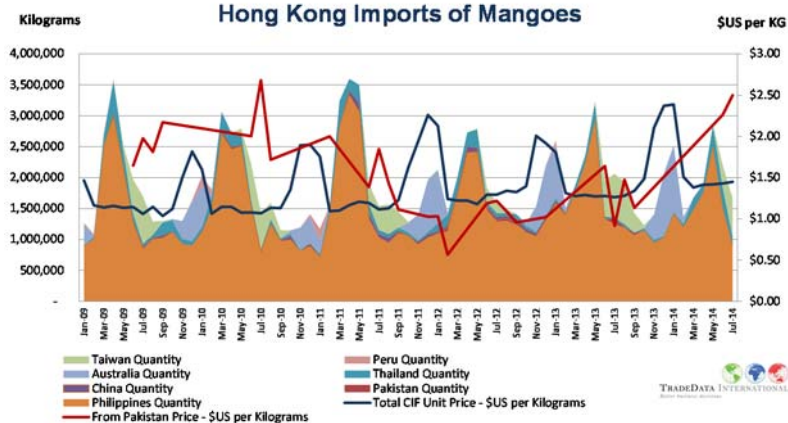
China Imports of mangoes - excluding mangoes from Myanmar



The existing China import market (outside of Myanmar) is small. The competition is against Taiwan, Thailand and the Philippines. Pakistan is a tiny supplier. During the Pakistan supply season Pakistan is competing against Thailand and Taiwan.

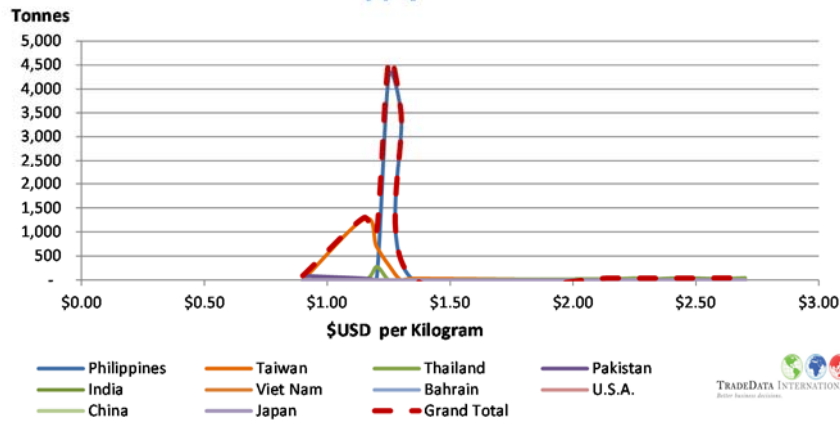
Note: (a) The very strong growth in this market from Taiwan in 2013 and again in 2014;
(b) A relatively small market of only 300 to 400 tonnes a month. However with the cessation of imports from Myanmar this market may now increase strongly.

Hong Kong Imports of Mangoes



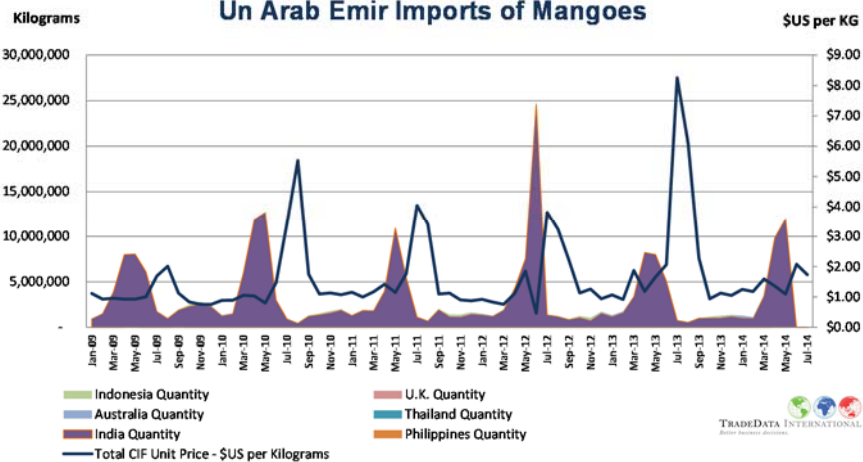
Hong Kong is mostly supplied by the Philippines which has the ability to supply 12 months of the year. Other important suppliers are Australia, Taiwan and Thailand. Pakistan is a tiny supplier and in the last two years has been price competitive

Price Histogram - Hong Kong Imports of Mangoes during the Pakistan Supply Season in 2013



During the Pakistan supply season the Philippines and Taiwan dominate the Hong Kong market and in 2013 sells at prices above the supply from Pakistan. Pakistan is a tiny supplier to this market

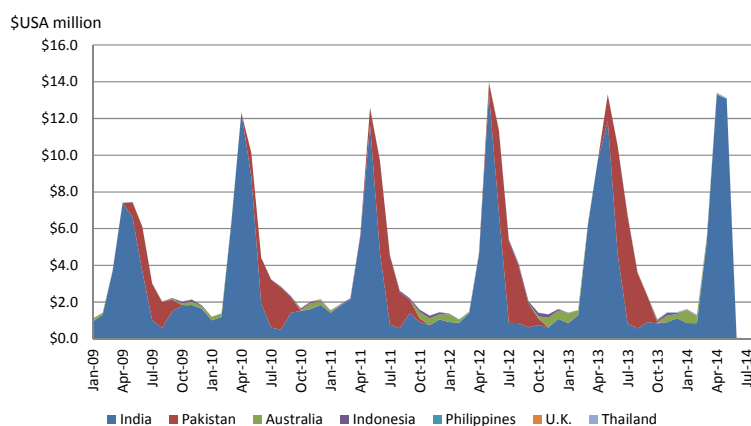
Un Arab Emir Imports of Mangoes



Please Note: This chart excludes imports of mangoes from Pakistan as these volumes (exports) are not published.

UAE imports, measured by volumes (excluding from Pakistan) are almost entirely from India and at prices around or below \$US 1 per KG. Average prices are highly seasonal. Out of season imports are mostly mango pulp.

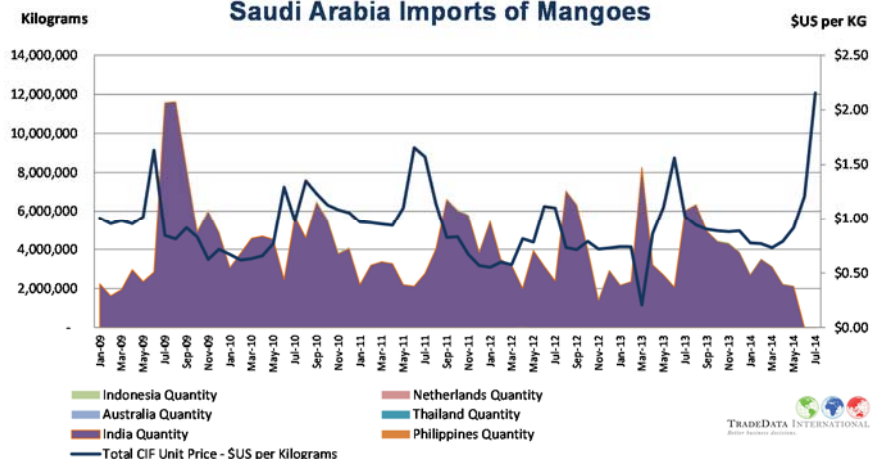
Un Arab Emir Imports of Mangoes by Value



UAE imports are dominated by imports from India and to a lesser extent Pakistan. Note that India can supply lower volumes in the off-peak season. Pakistan supplies after the Indian peak season and Australia (a smaller supplier) after Pakistan. Imports in total are fairly stable over time.

Please Note: This chart does not include exports from Pakistan in 2014.

Saudi Arabia Imports of Mangoes

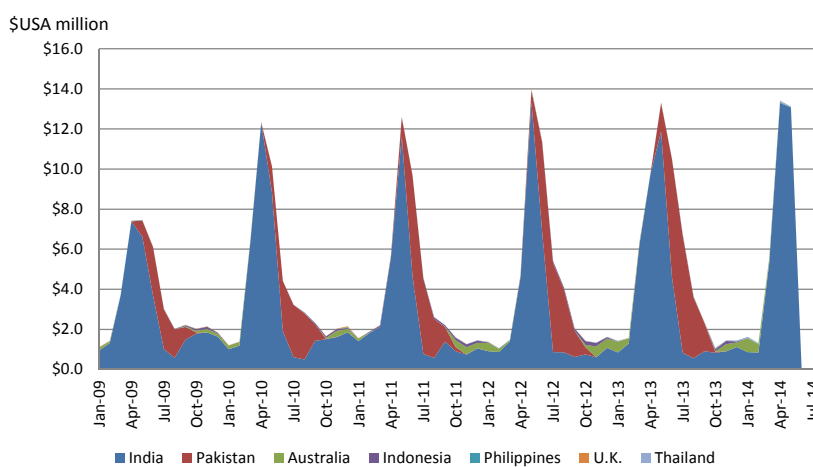


Please Note: This chart excludes imports of mangoes from Pakistan as these volumes are not published.

Saudi imports, measured by volumes, (excluding from Pakistan) are nearly entirely from India and at prices around \$US 1 per KG. India is able to supply 12 months of the year with out of season exports comprising mostly of mango pulp.

Note: No growth in this market, in fact import volumes are lower in 2013 than in 2009.

Un Arab Emir Imports of Mangoes by Value

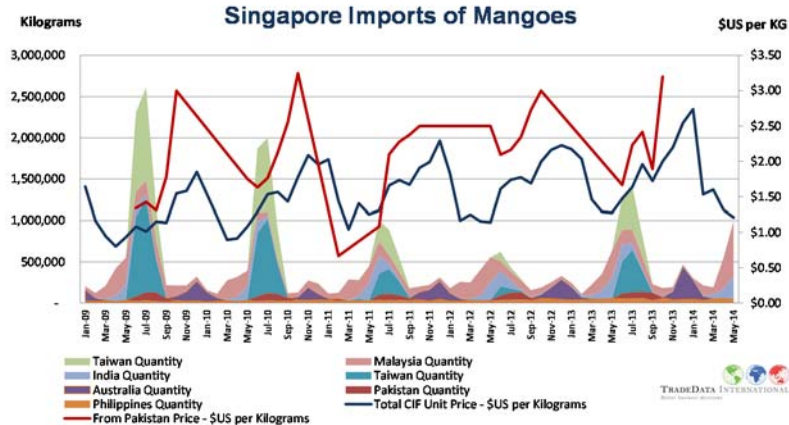


Saudi imports are dominated by imports from India and to a lesser extent Pakistan.

Please Note: This chart does not include exports from Pakistan in 2014.



Singapore Imports of Mangoes

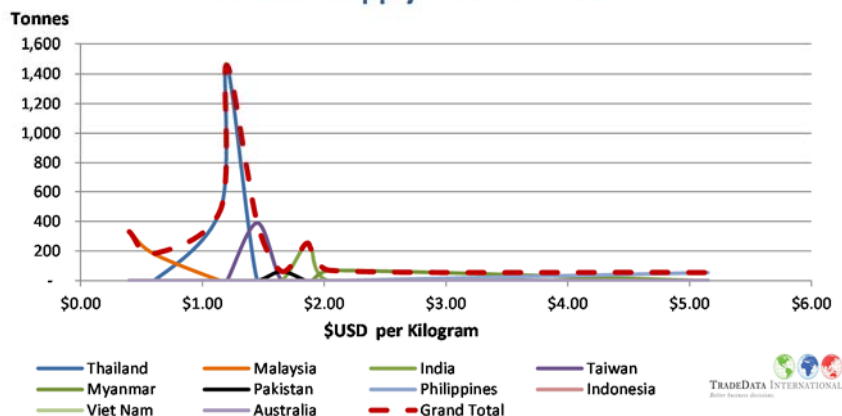


Please Note: Singapore import data is not available after May 2014.

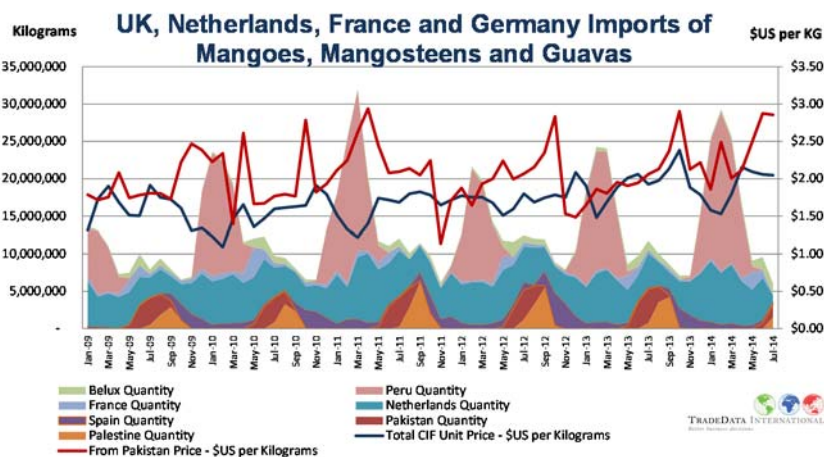


The Singapore import market is very seasonal with many different suppliers. Taiwan is a large seasonal supplier. Indonesia, Malaysia, Australia are also major suppliers. Pakistan is a small supplier and in the last two years has supplied at price above the major suppliers.

Price Histogram - Singapore Imports of Mangoes during the Pakistan Supply Season in 2013



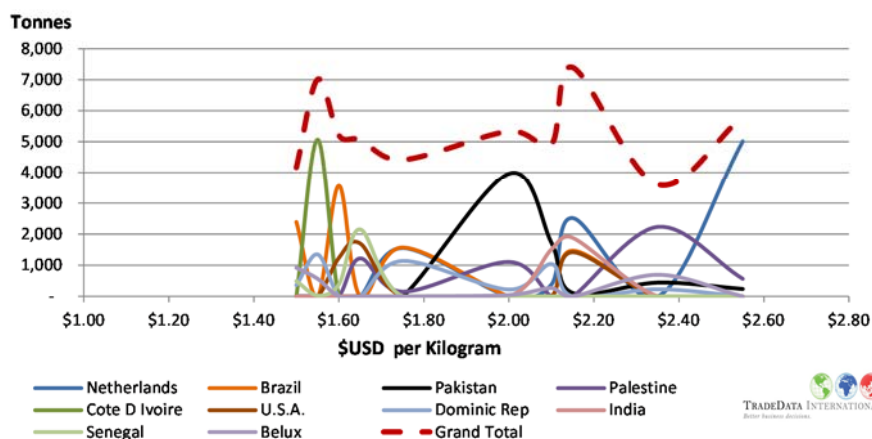
During the Pakistan supply season Pakistan is small relatively high priced supplier to Singapore. Supply from Thailand dominates the market. Malaysia is a lower priced supplier and Taiwan a slightly higher priced supplier.



Note: EU countries do not separate out Mangoes, mangosteens and guavas in their import statistics

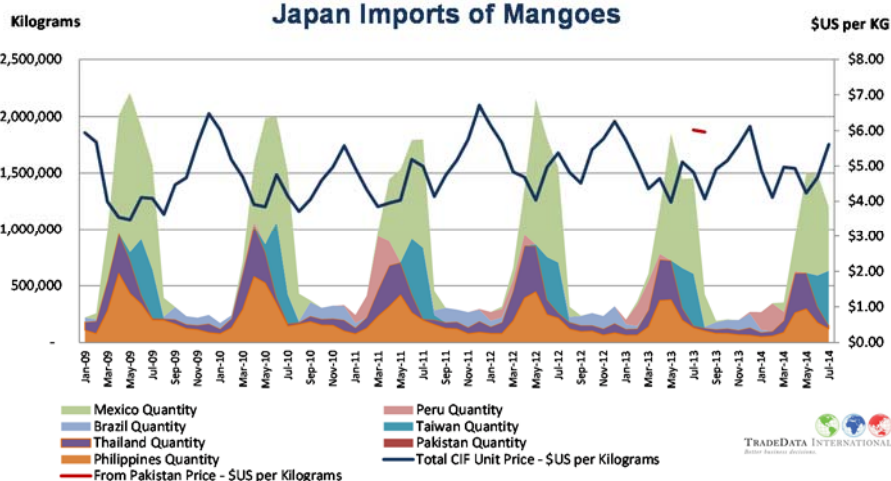
Pakistan is a small but significant exporter to Europe during its supply season and is price competitive. Average prices into Europe are 50 to 100 % higher than to the Middle East. There is some double counting here as the Netherlands (and others) first import fruit and they re-export the fruit elsewhere in Europe. These statistics also include Guavas and Mangosteens.

Price Histogram - UK, Netherland, France and Germany Imports of Mangoes, Guavas and Mangosteens during the Pakistan Supply Season in 2013



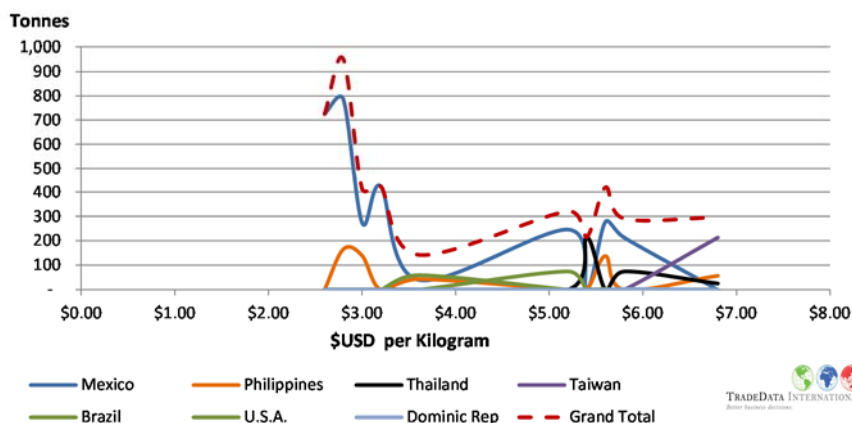
During its supply season Pakistan is a significant mid-priced supplier and competes against Brazil, Netherlands, Palestine, Cote D'Ivoire and others.

Japan Imports of Mangoes



The Japan market is mostly supplied by Mexico, Thailand, Taiwan, Peru and the Philippines. Japan is a particularly high priced market (but with stagnant volumes) with the average landed price in Japan at more than double other major markets. There was a shipment from Pakistan of 488 kilograms in July 2013 and a second shipment of 944 kilograms in August 2013. No shipments thus far in 2014.

Price Histogram - Japan Imports of Mangoes during the Pakistan Supply Season in 2013



Japan mostly imports at particularly high prices from \$US 3 up to \$US 7 per kilogram. Different countries supply at different prices –Thailand at \$US 5.50, Taiwan just under \$US 7, Philippines at \$US 3 and \$US 5.50 and so on.

The Global Market

Globally mango trade is 1.7 US\$ billion and just under 1.2 million tonnes in 2013 and growing steadily. Major import markets are the USA and Western Europe. UAE, Saudi Arabia and Japan are also important markets but many other countries import mangoes.

The Seasons

Global Imports are highly seasonal with the peak season between February and September each year. Pakistan is able to supply during the second half of the peak season between May and September. The peak month is May which is at the beginning of the Pakistan export season. By September global imports are only at 25% of the volumes in May. Pakistan is currently a small supplier to the global market but a significant supplier for a few months when in season.

During the Pakistan season the major importing countries are from North America, Europe and countries like the UAE, Saudi Arabia and Hong Kong. The major exporting countries at this time are from Central and South America, and South East Asia.

Pakistan Exports

Pakistan mangoes mostly go to UK and to a lesser extent elsewhere in Europe and the Middle East. Pakistan Exports are highly seasonal. Some countries are able to export throughout the whole year by exporting Mango Pulp and dried mango. Pakistan generally does not.

Import markets

Outside of the large import countries – USA, Western Europe, Saudi Arabia and the UAE – there are dozens of smaller import markets. China is not a major market but growing from a small base. Japan is a particularly high priced market.