Resultados del estudio de productos orgánicos en Francia (quinua, castaña, kiwicha, banano y mango)

(Webinar)

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Asistencia técnica en el marco del apoyo presupuestario a la política de promoción de la exportación de productos ecológicos – EURO ECO TRADE - Perú

Exporter Day – Lima – 08/07/2015

Objectives

- **Banana, Mango, Quinoa, Amazonia nuts and Kiwicha** : 5 Strategic products in the organic sector in Peru
- **Objective :** assess their potential to the export market
- **Methods :** A complete market study focusing on one of the major market for organic products in Europe: France
- **Outputs :**
  - ✓ Identify strength, weaknesses, threats and opportunities for each specific market,
  - ✓ Provide detailed information on key operators (buyer profiles) and main stakeholders of the organic industry in France,
  - ✓ Formulate recommendations on the products’ positioning (including price, product characteristics, communication and distribution channels).

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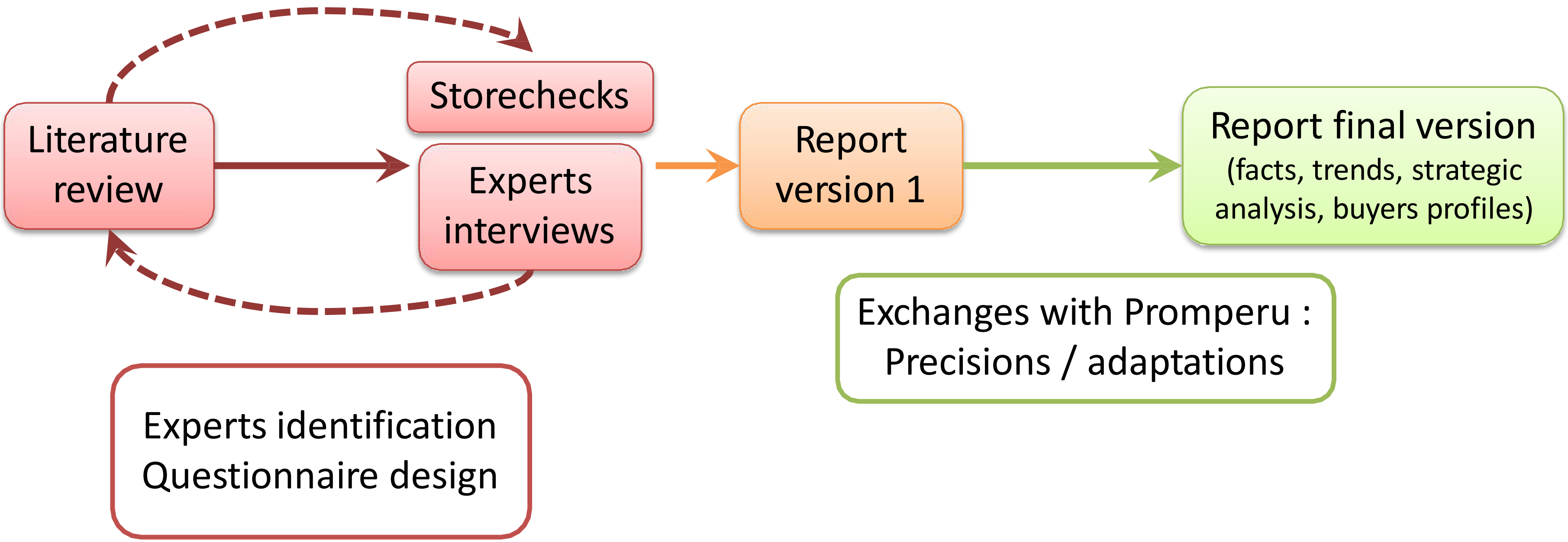
Methods

- **<u>The successive steps of the study were the following</u>**:



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Experts interviews

Questionnaires and buyers profile forms were designed to run this survey

Fresh Banana	5
Brazil nut	24
Kiwicha	7
Fresh Mango	6
Quinoa	4

<u>47 experts and operators of the supply chain</u> : importers, wholesalers, processors, traders, distributors and market observers such as research institutes, labeling organizations

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The organic market in France

General overview

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Organic market in France

- Historical organic market : since the 70's
- Organic market turn over in 2014 : 5 Billions *(estimations)*
- 2nd most important organic market in Europe behind Germany
- 3rd market worldwide (USA first)
- Market growth : 10% *(FIBL 2015)*

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Organic market in France

- Market share : 2,6% of total food sales in 2013 *(Agence Bio/CSA 2015)* : 7th place
- Per capita consumption : 61 € per year *(FIBL, 2014)* : 10th place
- The French organic market is diversifying and shows over-segmentation in some assortments
- Dynamic expected growth : 5 – 10 % per year in the coming years

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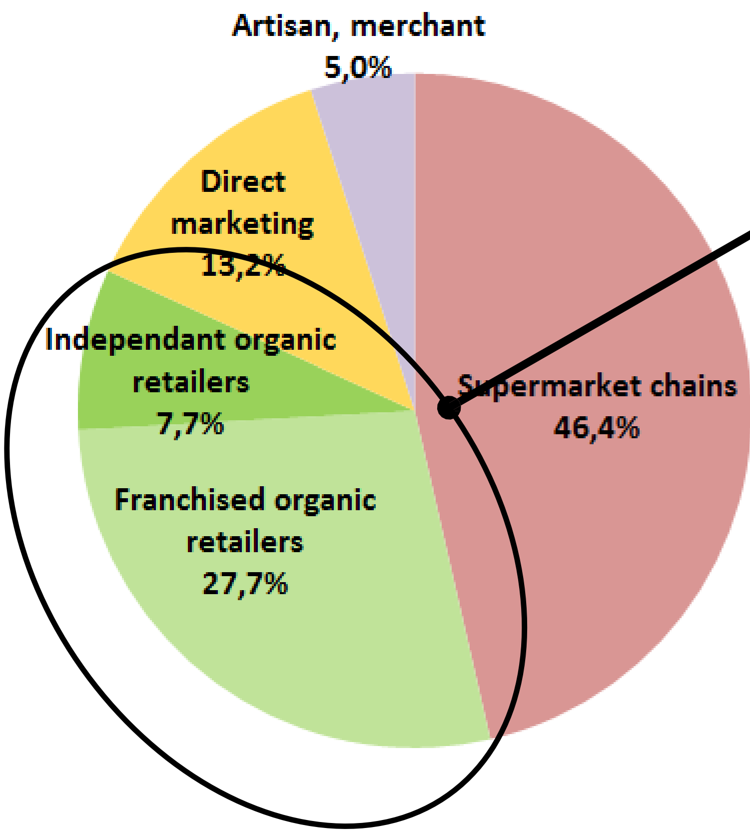
Organic market in France

Share of organic market by distribution channel, 2013 *(AgenceBio, 2014)*



Specialized organic retail total : 35,4 %
2300 stores

Franchised retail *900 stores*

Independent retail *1400 stores*

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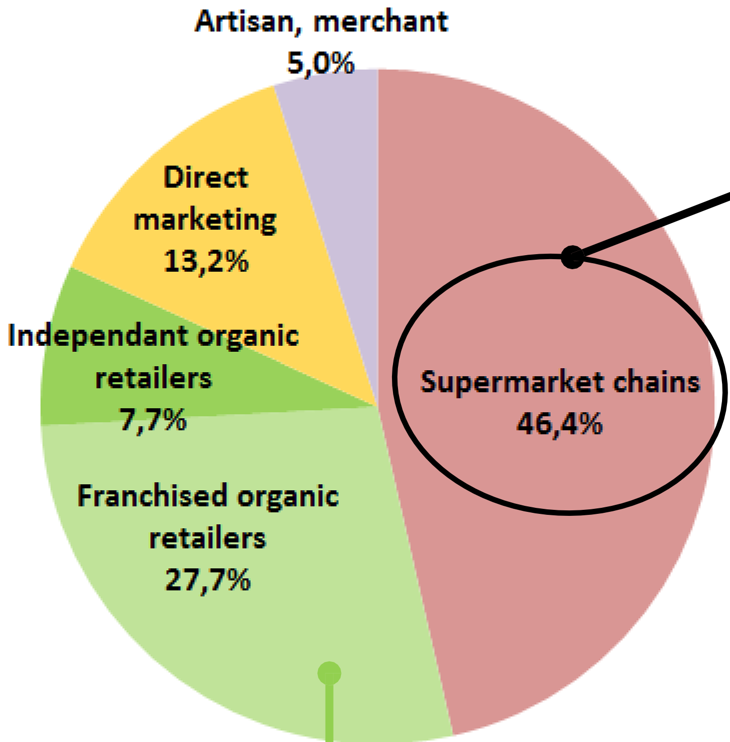
Organic market in France

Share of organic market by distribution channel, 2013 *(AgenceBio, 2014)*



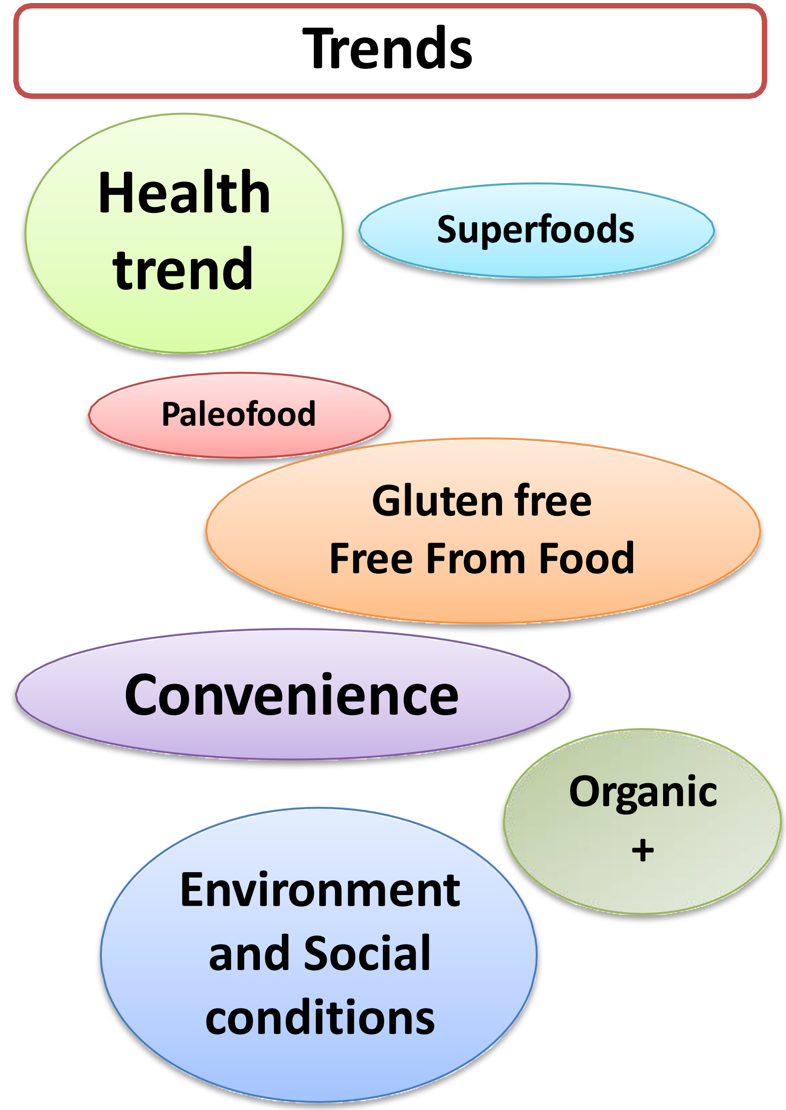
Conventional retails : 46,4 %
31000 stores

69 stores in 2013
92 in 2014

French consumers profile *(AgenceBio)*

- Organic consumption **deeply integrated in consumer habits**
- **88% of French consume, at least occasionally, organic in 2014**
- **62% of "regular" consumers**

  → 10% daily, 23% weekly, 29% monthly
- 92% of organic consumers intend to maintain or increase organic consumption
- **Main reasons for consuming organic products :**
  - **Health** (62%)
  - **Environmental aspects** (57%)
  - **Quality and Taste** (48%)
- **Principal consumption barrier : Price** (56%)



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ORGANIC QUINOA

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Offer analysis in France

Trends on Peruvian Quinoa global market – *organic and conventional* :

- Majority of exports from Bolivia and Peru → US markets
- Germany : main importer of Peruvian quinoa in 2012 **in EU**

Quinoa market in France :

- **France : key market for quinoa**
- **40% of total EU imports of Quinoa in 2009 → Mainly <u>directs imports from Peru and Bolivia</u>**
- **Almost totally organic Quinoa** *(experts estimations)*
- Mainly white quinoa
- **2 main origins : Bolivia and Peru** *(CBI, 2010)*

In 2013 : organic and conventional

- **Total imports in France = 4392 tons** (78% Bolivia, 22% Peru)
- **Re-exports = 996 tons** → mainly to UK, Belgium, Italy and Germany *(FAM)*
- **French consumption = 3396 tons**
- Small amount (369 tons) of intra-EU imports (Germany, Italy and Belgium)

Competitors :

- Bolivian organic quinoa represented almost 100% of French market before 2010
- **Bolivian origin still dominates the French market (Quinoa Real)**
  - → **historical supplier since the 80's** (vertical integration + long relationships + quality reputation)
  - → **EU destination decreasing since 2009** *(FAO, 2013)*
- **Peruvian origin becomes more and more important → EU exports are steadily increasing** *(FAO, 2013)*
- France, Canada, Australia and India are also producing Quinoa (emerging producer countries)

Market access to France

<u>Peruvian Quinoa</u> :

- Usually imported from Peru by an agent/importer
- Main importers are in France, Netherlands and Germany
- Importers increasingly perform packing activities
- Farmers are working more with private importers than vertical integration ≠ Bolivia
- But strong demand → actors are looking to secure supply by integrating, at least partly, production
- Imports concern processed and unprocessed grains (mostly **white quinoa + other varieties :** red, black and wild quinoa)

Major actors in the French Quinoa market

Mainly importers

(group Ekibio)

<u>Euronat and Markal</u> :

✓ major part of import volume in France
✓ wholesalers and processors
✓ large distribution network to organic stores
✓ delivering organic specialized, fair trade and conventional distributors

Market access to France

Freight costs : ≈ 250$/ton **<u>European import price for Bolivian origin</u> :**

- **1500 $/ton before the quinoa boom**
- **8000 $/ton in 2014**

<u>European import price for Peruvian origin</u> :

- **didn't exceed 5000 $/ton in 2013 competing Bolivian origin**

<u>Consumer prices in specialised organic retail</u> :

- **reached 13-14 €/Kg in 2014 (bad harvest) → start to decline today (good harvest)**

Example prices and margins for Peruvian quinoa *(experts)*

Market actor	Price and margin	Total
Farmer (from field without washing)	4000$/ton	**4000 $/ton**
Exporter (Transformation, Packaging, Export)	1000$/ton	**5000 $/ton**
Freight (Ex Works)	250$/ton	**5250$/ton**
Importer/wholesaler	Margin: 12-15%	**6000$/ton**
Retail specialized retail without VAT (5,5%)	Margin: 50-100%	**11000$/ton**

Market access to France

- **Organic quinoa is distributed through different distribution channel and different brands :**
  - In organic retail
  - In conventional su n regression)
    - Private brands (g
    - Organic Fairtrade
- **Biocoop : 40% of total French organic quino t**

  ➔importer Soli q Bolivia

Demand analysis

- **Quinoa is known as a healthy alternative for other cereals (benefits recognition) :**
  - Interesting product for French consumers
  - Gluten free market : rapidly raising market with high potential
  - Other niche markets as vegetarian food, exotic, fair trade are interested in the Andean grain *(CBI Market information: Quinoa – EU- Peru, 2010).*

- **Consumers have today a large choice of products and are more and more familiar with product range** *(CBI Fact sheet Quinoa in France, 2010).*

Peruvian quinoa VS Bolivian quinoa *(based on experts interviews)* **:**

	Peruvian quinoa	**Bolivian quinoa**
+	Expanding offer	Particularly well known in France (early introduction) Consumers are familiar to it Reputation of better quality : quinoa real
-	Grains are smaller and crispier Still not well identified by consumers	Unstable prices

Main findings on the organic quinoa market in France

- **France is one of the leading markets for quinoa in Europe :** Familiar with this product, demand increased continually from the late 80's until today
- **2012 / 2013 : Demand in Europe and US increased → Price speculations**
  - Bolivian origin quinoa prices have become very high
  - Market slowed down, products were massively delisted in conventional retail
  - Organic retail maintained quinoa offer : daily product for organic consumers
    - Packaging sizes reduction → to maintain affordability
  - Peruvian origin became a real alternative to Bolivian origin
- **Market still has development potential but prices cannot exceed certain limits**
- **Market actors are :**
  - Complaining the recent market speculations and the resulting market fluctuation
  - Underlining the **<u>necessity of more stable market conditions</u>**
  - Looking for **<u>alternative suppliers and good quality</u>**

Recommandations

Organic Peruvian Quinoa

- ✓ **Fit to quality requirements of companies → comforting market actors**
- ✓ Insist more in communication on **quality differences** and on **Peruvian origin for quality quinoa**
- ✓ **Limit fluctuations and price speculation, build more sustainable market cooperation** instead of basing on price speculations
- ✓ Take advantage of the actual market restructuring by **offering a sustainable and affordable alternative for Bolivian quinoa**
- ✓ **Face Indian and French domestic quinoa competition by strongly enhancing ecological and quality aspects**
- ✓ **Focus on the French consumers groups more likely to resist possible price developments :**
  - Glutenfree
  - Vegetarian/vegan
  - Healthy food consumers, …

ORGANIC KIWICHA

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Offer analysis in France

Trends on Peruvian Kiwicha global market *(AgrodataPeru)* ***– organic and conventional*** **:**

- Global exports : + 53 % in 2014 → 2,4 million $
- Prices : + 63 % in 2014 → 4,27 $/kg in average

Kiwicha market in France :

- **Almost totally organic Kiwicha** *(experts estimations)*
- **2 main origins :** Peru + India
- France depends mainly on **intra-EU imports**
- Small amount of direct imports

Organic Peruvian Kiwicha market in France :

- No specific statistics → estimations : **<u>10 tons in France</u>**

Competitors :

- **Historical producer countries → Bolivia, Peru** and on a smaller scale **Argentina**
- India has invested widely in Kiwicha production and floods the markets

  → **Indian Kiwicha is competing Peruvian Kiwicha in European and French market**
- **European market** is provided approx. **50% by India and 50% by Peru** *(experts estimations : Delphi Organics)*
- **Bolivia also supplies the French market** with Kiwicha but volumes are minor

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Market access to France

Major actors in the French Kiwicha market
→ Specialised in organic, natural or healthy food products

(group Ekibio)

<u>**Peruvian Kiwicha**</u> **:**

Usually **imported from Peru by a European agent/importer** (Germany, Belgium)

➢ doesn't secure long term collaborations between exporters and EU processors / wholesalers

- **most repacking is directly handled by importers**
- **fluctuant market prices → some importers switched to "back-to-back" purchases**
- **commercialised via specialized organic retail in Premium organic segment →** Processed products or grain mixtures (nutritive qualities)

Freight costs : ≈ 250$/ton – transporter for France : CMA CGM Marseille

Consumers price for organic kiwicha grains from Peru in specialized organic retail (without internet sales) : **8€/kg on average (from 6,04€/kg to 11,16€/kg)**

Demand analysis

The Peruvian Kiwicha fits to main consumers trends :

- highly nutritious, organic, gluten free, easy and rapid to prepare, …

… But doesn't fit to consumer taste

- not tasty enough and glutinous texture once boiled

Consumers prefer processed products (flour, flakes, muesli, pasta, bread, convenience food, cereal bars, cakes, crackers, …) **than unprocessed**

Peruvian Kiwicha VS Indian Kiwicha *(based on experts interviews)* **:**

	Peruvian Kiwicha	Indian Kiwicha
+	**Relevant market advantages :** quality, traceability, organic certification and historical aspect, sustainability → **Permitting better communication**	**Lower prices** **Higher volumes**
-	**Higher prices**	**Lower quality and traceability** **Bitterness**
Use	**Unprocessed**	**Ingredient for processed foods**

Main findings on the organic Kiwicha market in France

- Compared to other European markets, especially Germany, **the Kiwicha market in France remains very small**

  → **remains a niche**

- **Price and offer fluctuation destabilizes the market**

- **Indian Kiwicha** → future strong competitor

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Quinoa / Kiwicha

- **Kiwicha and Quinoa were both introduced in the 80' in France**
  → did not progress similarly
- **Kiwicha is today in a stage of lifecycle of product similar to quinoa in the 90'**

Quinoa in France	Kiwicha in France

• **Familiar to consumers**
• **Well introduced to the market :** available in all distribution channels
• **Substitute for rice often used as a slide-dish** (raw material)
• **Omnipresent in the market :**
  • **from basic to premium product range of distribution channels**
  • **From raw material to transformed products**
	• **Not very common**
	• **Considered as a new product** that allows diversifying purchases (occasional)
	• **In transformed products :** ingredient for biscuits, cereals, …
	• **Didn't integrate the basic product range of distribution channels**
	• **Not available in conventional retail**
	• **Not appreciated for its taste** (not tasty enough)
	• **Buy for nutritive reasons**

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Recommandations

Organic Peruvian Kiwicha

Face Indian competition by :

- ✓ enhancing quality positioning and historical market position
- ✓ developing sustainable market relationships with French or European buyers (steady quality and quantity)

Develop communication tools (with retail actors and exporting companies) **on nutritive qualities and culinary utilization in order to :**

- ✓ Profit from consumers increasing demand for healthy food with dietary qualities (Premium organic segment)
- ✓ Focus on targeted groups (coeliac, vegan etc.)

Enhance export strategies to reach the French market (intra-EU trade)

ORGANIC AMAZONIA NUTS

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Offer analysis in France

Trends on Amazonia nuts global market – *organic and conventional* :

- Germany : largest European importer regarding all nuts and dried fruits
- UK : largest European importer regarding Amazonia nuts (39% of all imports)

Amazonia nuts market in France – organic and conventional :

- **France : on the 6th place for consumption in Europe in 2012** (INC, 2014) → **Probably 4th today**
- **2 main origins :** Bolivia, Brazil
- **Less than 25%** (80-100 tons) **of total yearly imports are organic**

Organic Amazonia nuts market in France :

- **<u>Mainly intra-EU imports</u> :** by German, UK and Dutch traders/importers
- **≈90% of the French organic Amazonia nuts market → covered by Brazil and Bolivia**
- Less than 5% from Peruvian origin (estimations)

In 2013 : organic and conventional

- **Total imports in France = 458 tons (shelled) :** (64% Bolivia, 10% Germany, 9% Brazil, 6% UK)
- **Direct Imports from Peru = 2 tons**
- **Re-exports = 40 tons →** mainly to UK, Spain and Italy *(FAM)*
- **French consumption = 418 tons**
- Small amount (72 tons) of intra-EU imports (Germany, UK)

Competitors :

- **Bolivia : principal competitor →** Principal supplier for the French market
- **Brazil / Bolivia : Historical producer countries →** Long term collaborations

Market access to France

Peruvian Amazonia nuts *(Based on experts interviews)* :

- **For Organic Amazonia nuts, the main physical arriving countries → Germany** (Hamburg), **UK** (Felixstowe) and **Netherlands** (Rotterdam).
- **In Germany, UK and Netherlands → importers specialized on edible nuts and dried fruits**
- **Main trade channels :**
  - **Exporting country - Germany – France**
  - **Exporting country - UK – France**
- Often a strong commercial link between importer and producers (transparency) especially with Fairtrade
- Whereas the food industry is the biggest user of edible nuts → **most Amazonia nuts end up directly in the retail sector without further processing : as a snack.**
- **95% of the imported and resold organic Amazonia nuts → for consumption as kernels** ≠ Other European countries → nut mixes and mueslis
- Importers supply the market either directly or via packers → Organic Amazonia nuts are **mainly sold in the specialized organic retail in France**. Lots of brands are manufactured in Germany

Major actors on the French Amazonia nuts market
Main importers, traders, wholesalers and brands

Freeworld

HACHES SCHINDLER GMBH the hanseatic nut company

eBa Empresa Boliviana de Almendra y Derivados

RAPUNZEL

NUTFIELDS

ecoterra

distriborg GROUPE

Accent Bio

Bio c'est la Vie PURAL

Delphi organic

VITAFRAIS

Keimling

COMMERCE ÉQUITABLE SALDAC Trésors du Pérou

nutland bv NUTS & DRIED FRUITS

TRADIN Organic Global Organic Ingredients

FLORES FARM

WORLÉE

French enterprises specialized on the sectors of cereals and dried fruits and of fair trade
(Solidar Monde, Markal, Celnat, Euronat)
→ **DO currently NOT trade with organic Amazonia nuts** → **Potential market partners**
(importer/buyers/wholesalers)

Market access to France *(Based on experts Interviews)*

Freight costs : ≈ 250 – 280 €/ton
Transporter for France : CMA CGM Marseille (3rd largest container shipping company worldwide)
<u>CFR (cost and freight) for organic Amazonia nuts</u> : 6,7 – 8,4 € / Kg
<u>Trade margins for Amazonia nuts</u> : can be up to 50% of the final consumer's price
Highest margins :
•**shelling** (usually in producing countries)
•**packing + labelling** (mainly in importing countries) **<u>Export +</u>**
<u>Import margins</u> : < 25 % of the final consumer's price <u>Distribution</u>
<u>margins in France</u> : can go up to 150% **<u>Final consumer</u>**
<u>prices</u> : from 16,94 €/Kg to 39 €/Kg (including VAT)

Example for approximate prices and margins for Peruvian Amazonia nuts *(experts)*

Market actor	Price and margin	Total
Collector / Farmer (in shell)	4500 - 5500 $/ton	**4500 - 5500 $/ton**
Exporter (Shelling, Packaging, Bulk Labelling, Export)		**8500 $/ton**
Freight, Insurance	200 - 250$/ton	**8750 $/ton**
Importer / Wholesaler	Margin: 20-25 %	**11000 $/ton**
Packer/wholesaler	Margin: 20-25 %	**15000 $/ton**
Retail : specialized retail without VAT (5,5%)	Margin: 50-100%	**20000 – 25000 $/ton**

Demand analysis

Amazonia nuts fit perfectly to main consumers trends :

- easy to handle (may be stored up to 2 years), wholesome and deliver "sustainable energy", highly nutritious, healthier snack product, organic and gluten free
- Usually sold as monoproducts (shelled and partly peeled) in consumer packaging
- More rarely mixtures or processed (roasted kernels)

But … they don't seem to be very well known by French consumers. Other nuts are dominating the market.

Warnings :

- **More and more consumers with food allergies or intolerances** → nuts are in a less favorable position
- **Nuts are more consumed at Christmas time** → Amazonia nuts sales are subject to seasonal fluctuations
- **The term "Brazil nuts" may be misleading** → expectation for a Brazilian origin

Critical quality points :

- **Taste**
- **Aflatoxin and Bromide content and Fat content** (too much fat → rancid nuts)
- **Medium size** (110 – 130 nuts per lb) → fit the **organic packers demand**
- **Smaller sizes** → fit the **mixtures processors demand** → easier to handle
- **Traceability** → To communicate on the production location

Demand analysis

Peruvian Amazonia nuts VS Bolivian/Brazilian Amazonia nuts *(based on experts interviews)* **:**

	Peruvian Amazonia nuts	Bolivian and Brazilian Amazonia nuts
+	**Possibility to create new partnerships with smallholders**	**Historical supplier** **Better quality :** better peeled, harvested by hand, experienced processors…
-	**Small product range** **Not all types** (sizes) **of Amazonia nuts available** **Not enough volume** **Supply difficulties** **Prices are sometime higher** (small quantities)	

Main findings on the organic Amazonia nuts market in France

- Amazonia nuts : represent less than 1% of the total nuts consumption
  - ➢ **remains a niche in the global European edible nuts market**

- Consumer awareness and new trends to health and natural food
  - ➢ **Consumption of nuts and Amazonia nuts is rising in European countries, and especially in France**

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Recommandations

Organic Peruvian « Amazonia nuts »

Create new partnerships directly with French market players and create a win-win-situation

Enhance marketing on Amazonia nut by putting forward:

- ✓ health/nutritional benefits of Amazonia nuts
- ✓ sustainability of production and supply chains
- ✓ fair trade and transparency
- ✓ information on how to cook/prepare

Target :

- ✓ the Out of Home market,
- ✓ Organic energy bars and muesli processors (3-5 main actors in France)
- ✓ buyers of the conventional retail

Build steady price conditions for processors and buyers, and sustainable relationships

Avoid the term "Brazil nut" and replace it by "Amazonia nut"

ORGANIC BANANA

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Offer Analysis

Organic banana market in France

- Around 60 000 tons/year **= 10% of total French banana market** (562 000 tons in 2013, 540 million euros) *(Fruitrop)*
- approx. 30% of organic bananas also fairtrade certified
- Main origins : Dominican Republic, Peru, Ecuador, Ghana
- Very dynamic growth: organic banana more than doubled between 2010 and 2014 (in volume). Expected future growth : 15%

Peruvian Organic bananas

- 75% to Europe *(no specific statistic for France)*
- Key player in France for fairtrade market. Good quality origin + good business reputation.

Competitors

- Dominican Republic = more than 70% of organic banana volumes in France (50% in the EU). Strong price competitiveness, but :
  - rising South-American origins (mostly Peru and Ecuador in France)
  - rising African organic bananas (Ghana Fairtrade organic bananas)
  - French "sustainable" banana from Antilles (non organic)

French market access

- The Netherlands = main hub for organic banana + small amounts directly imported to France : Port Vendre, La Rochelle, Le Havre

- Most key industry players in the French conventional banana industry are involved in the organic supply chain.

  They integrate ripening/packing/distributing, some import themselves as well

- Organic banana is in all distribution channels

  Last decade : strong growth in conventional retail, but specialized organic retail remains key dynamic channel as well

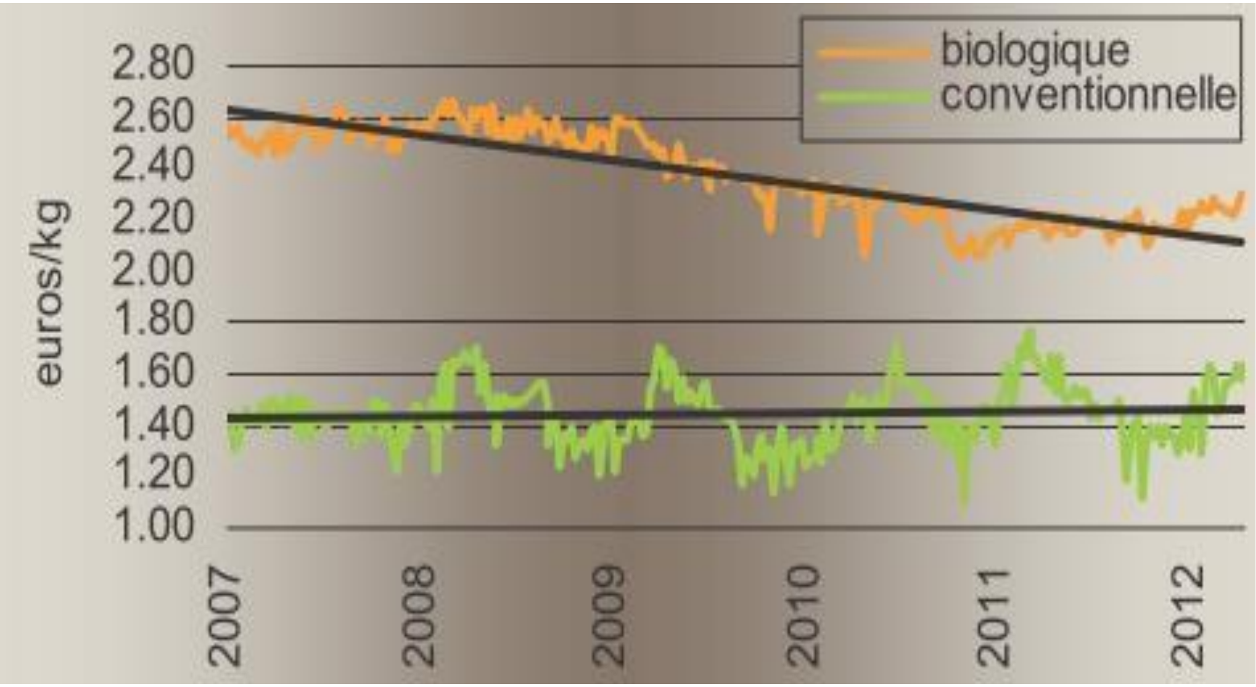
- Exporter / importer / retailer brands

  Flowpack = mandatory for conventional retail

- New tariffs (trade agreement between EU and South American countries)

French market access

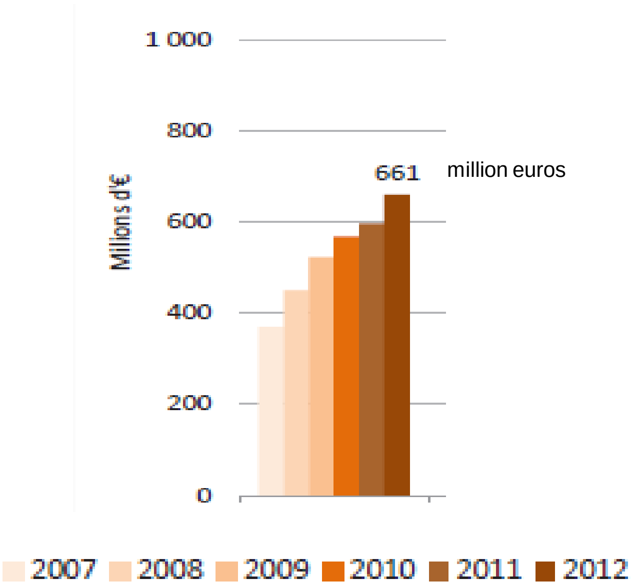
- Organic wholesale prices : between 1,38€ and 1,70€ in January 2015
- Retail average price : 1,98€ for conventional supermarkets and 2,19€ for specialized distribution (Biolinéaire)
- Decreasing retail prices of organic bananas for 5 years due to retailers' policy.
- Sharp decrease of price difference between conventional and organic : from >1€/kg in 2007 to <0,65€ in 2012 (Fruitrop)

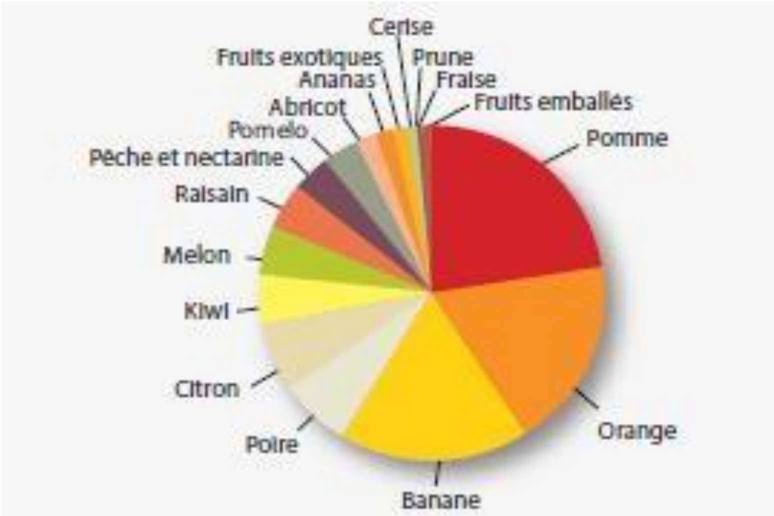


Demand analysis

- Banana is a very popular fruit in France, it belongs to the daily food basics : cheap, available year round, particularly consumed in winter
- Third fruit in conventional and organic (volumes)
- Organic fruit & vegetable sector : the most dynamic in organic market
- 8 kg/person/year (conventional + organic) , stable despite decrease in fruit consumptio

Organic Fruit & vegetable market turn over in France





- Key consumer trends for the banana market :
    - Increasing awareness of social conditions and fair value share
    - Concern for environment
    - “Local & French first” : organic bananas vs sustainable Antilles bananas in the future ?

Main findings on the organic banana market in France

- One of the most successful products in the French organic market (10% market share), still dynamically increasing
- New EU tariffs improve low price competitiveness of Peruvian bananas vs Dominican Republic & Ecuador
- Peru : good business reputation among banana sector, key Fairtrade origin in France
- New organic African origins, introduced by dominant players in the French banana market → increase competition, especially for conventional retailer channel

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Recommandations

Organic Peruvian Banana

- Take advantage of new access conditions and quality requirements to build stronger competitiveness
- Consolidate differentiation on sustainability (environmental and social criteria, traceability, quality aspects, local projects, small producer organizations)
- Communicate more on quality and ethical involvement of the supply chain
- Consolidate position in the specialized organic distribution channels in priority

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ORGANIC MANGO

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Offer Analysis

- Experts estimations of organic fresh mango consumption *(no official statistics available)* :

  5000 tons per year in EU (2,5% of EU mango market)

  1500 tons per year in France representing (around 5% of the mangoes imported in Europe)

- Mainly sea-freight, but air-freight is increasing (trends : « tree-ripened », wild varieties, ready-to-eat)

- More and more suppliers and origins, but also steady market growth → healthy market development and conditions (for now)

Main origins on the organic mango French market - import calendar

	jan	feb	mar	apr	may	june	july	aug	sep	oct	nov	dec
Peru												
Mali and Burkina												
Dom Rep												
Spain												
Ecuador												

French market access

- Fresh organic mangoes coming to the French market arrive via the Netherlands and Port Vendre (Southern France) + minor volumes via Germany/Belgium/Spain/)
- Independent importers (no vertical integration by conventional retailers on mango in France, for now)
- Double movement : multiplication of stakeholders trading mangoes in EU + organic fruit wholesale in France re-concentrated by organic specialized operators
- Market players are willing to secure supply as :
  - year round supply is challenging,
  - variability in season duration is high,
  - shortages are recurrent
- Key channel : specialized organic retail (estimated between 70% - 85%)
- More and more volumes in conventional hypermarkets

Demand analysis

- "Democratization" of mango consumption in France
- Consumption of exotic fruits concentrated during winter and early spring, with peaks during holiday periods
- Mango consumption : between 450 and 500g mango/year/person (France)
- French consumers prefer medium-sized, fibreless, red-skin mangoes - but diversification and increasing knowledge → more and more flexible preferences
- Kent variety is the reference, but increasing diversification. Main other varieties appreciated by French consumers : Keitt, Valencia Pride, Amelie, Osteen, Haden. "Wild mangoes" are getting popular as well
- Main consumption trends in the French mango market (apart from organic) :
  - Ready-to-eat mangoes
  - Convenience products
  - Ethical, social and environmental concerns
  - Segmentation
  - Local first / no airplane transport

Main findings on the mango organic market in france

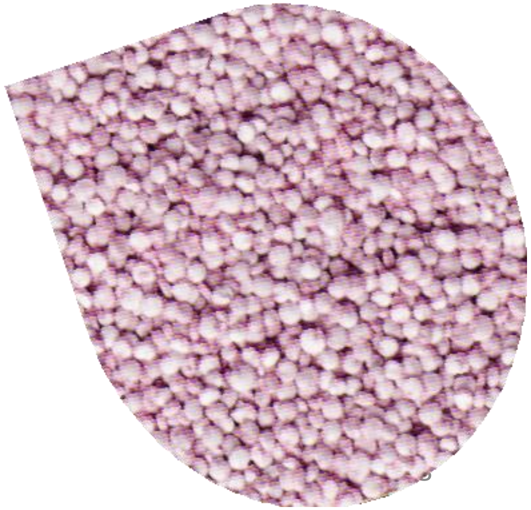
- Upward trend for fresh organic mango market in France
- Growing expectations regarding stability of quality and supply
- Organic mango present in all types of channels, but still rare in intermediary-sized supermarkets (=most numerous), where the organic fruits and vegetables offer is still modest
- Increasing segmentation (as in all conventional fruits sector) that has benefit organic mango but also implies new challenges : ready-to-eat mangoes, ethical and social expectations, pre-peeled & packed mangoes etc.
- Peruvian mango = key product for winter supply of the organic market
- Peruvian climatic conditions are known to generate uncertainty and variability in offer, in terms of quality and season duration

Recommandations

Organic Peruvian Mango

- Maintain good quality and prices that make Peruvian organic mangoes good reputation
- Enhance reliability and trust with European importers, who start to be concerned by the multiplication of operators in the Peruvian conventional mango export business
- Consolidate organic specialized wholesalers and retailers (still key players), develop relations with conventional hypermarkets
- Develop earlier varieties in organic production (=> more volume at peak seasons) and high value varieties for niche markets (native/wild)
- Keep aware of the other up-coming consumers’ expectations (mainly ready-to-eat, convenience and social sustainability)

Thank you !



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