

Ministère du Commerce, de
l'Industrie et de l'Artisanat



■ agence sénégalaise de promotion des exportations

Can smallholder producers ever succeed in export supply chains? Case study: Senegal Mango sector

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Sicap Amitié III, n°4426 - B.P. 14 709 DAKAR Peytavin

Tél. : +221 33 869 20 21 - Fax : +221 33 869 20 22 - Site Web : www.asepex.sn - E-mail : asepex@asepex.sn



AGENDA

- 1. Mango of Senegal: History & statistics**
 - 2. The values chain of Senegal MANGO**
 - 3. Opportunities and Constraints to develop the mango sector**
 - 4. Initiatives taken to improve the competitiveness of the mango value chain**
 - 5. Conclusion**
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1 – MANGO SECTOR IN SENEGAL: History & Statistics

The history of mango in Senegal dates back several centuries

- Introduction of Mango in Africa in the 10th century.
- In Senegal, the introduction of improved varieties held in St. Louis around 1893.

Significant economic and social impacts:

- Current production: 120.000T or (= CFAF 8 billion is exported \$ 14.5 million).
- Level of exports (2012): 8500T is (= 7% Production).
- Number of jobs: 23 600 people, including 44.7% of women.

In almost every traditional house in Senegal, you find a tree of mango



1. Mango of Senegal: History & statistics

The field of small producers and small and medium enterprises

Entreprises In Mango	Number of business units			Taille		
	Rural	Urban	Total	Micro	Small Business Enterprise (SME)	Large Enterprise
Packaging centers	8		8		5	3
Exporting	15		15			
Transformers	3	2			5	

Micro: Less than 10 persons - ** PME - 11 to 100 persons - * Large : over 100 persons*

Sectors	Estimates jobs	Genre		Seasonal	Full time
		Men	Women		
Production	15.000	12.000	3.000	100%	
Post harvest operations	1.800	300	1.500	100%	
Tradespeople	5.000	500	4.500	100%	
Conditionnement export	1.500	200	1.300	100%	
Transformateurs	300	50	250		100%
TOTAL	23.600	13.050	10.550		

Source: USAID Study on the competitiveness of Senegalese mango



1 – MANGO SECTOR IN SENEGAL: History & Statistics: In the world

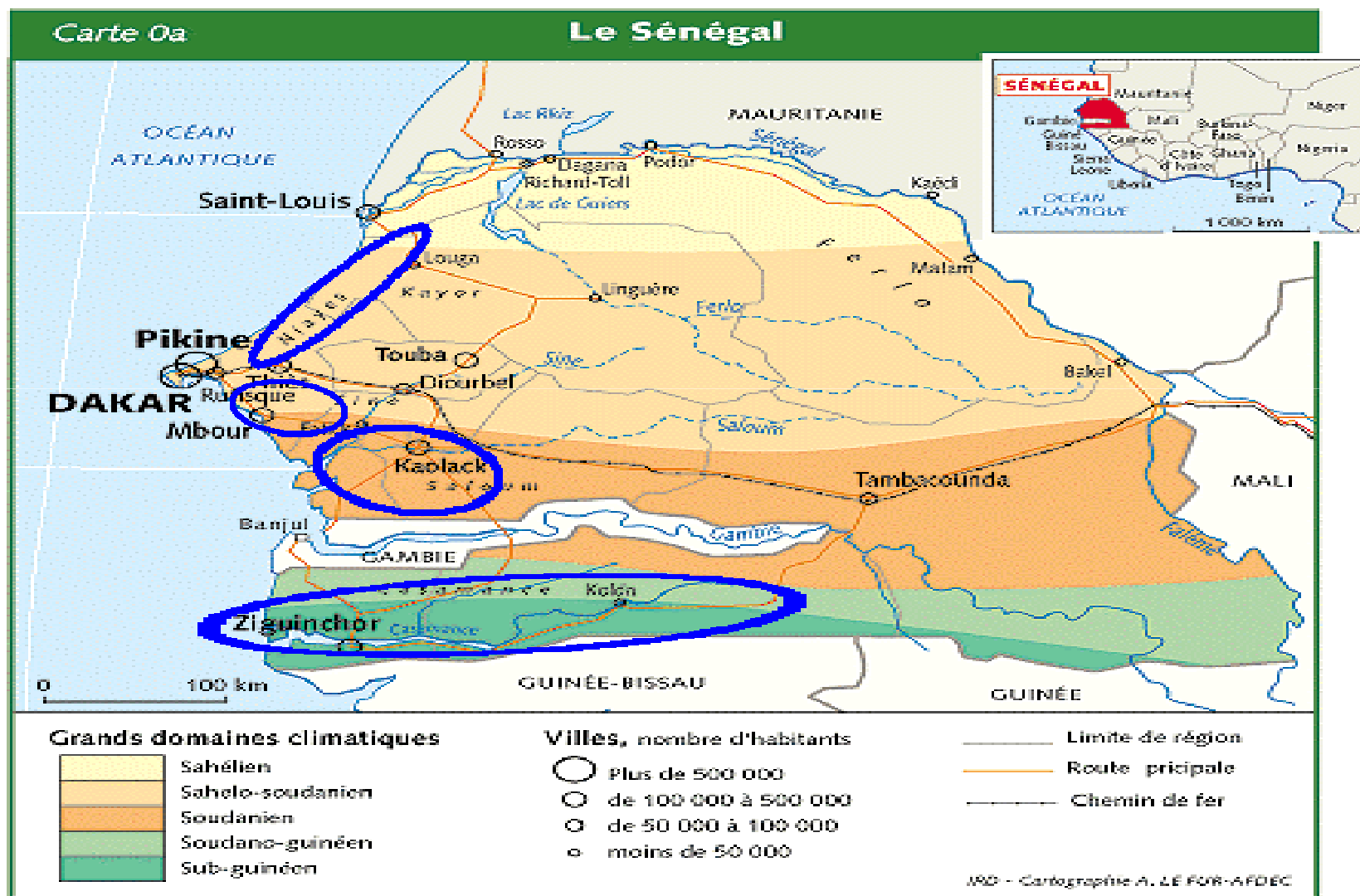
- Second after the banana fruit in terms of production**
- World production: 35 millions tons in 2009 with Asia (77%), America (13%) and Africa (10%).**
- World exports 1.1 million tons in 2010, or 3% of the volume of international trade.**

We see that mango offers significant opportunities for our developing economies, in the world market.





PRODUCTION AREAS OF MANGO IN SENEGAL





3 - VALUE CHAIN OF MANGO OF SENEGAL





3 - Opportunities and constraints in the mango sector in Senegal

Opportunities in the Mango sector in Senegal

- 4th largest producer of ECOWAS: 110,000 tons in 2011,
- The most popular varieties for export are Kent and Keitt - the taste and appearance are major assets for Senegal
- Production period the longest in West Africa (May to mid-October)
- Shipping to Europe, the shortest of West Africa: 6-7 days - 95% of exports by sea and air by 5%.



3 – Opportunities and constraints in the mango sector of Senegal

CONSTRAINTS

- **Limited quantity exported in 2012: 8500 tons in 2012 and 7700 tons in 2011,**
- Inadequate infrastructure and logistics related to export (storage infrastructure)
- Insufficient capacity of producers and exporters;
- development of plant diseases and pests on plants;
- deficiencies in technical skills (quality);
- weak competitiveness of exporting firms
- Inadequate organization of the market
- Difficulties in accessing economic and commercial information
- Insufficient market penetration strategies
- Limited diversification of the mango sector (fresh vs. processed)
- Limited supply of exportable products (quality and quantity)
- Inadequate means of production,
- Production and post-harvest losses (20%)



4 – Initiatives to improve competitiveness of the mango sector

- **the Government of Senegal support to mango smallholders, through comprehensive policies including:**
 - Document of Economic and Social Policy called (DPES)
 - Consolidated Program Document for Export promotion (2008 - 2012) (co-directed with ITC)
 - Diagnostic Trade Integration Study (Enhanced Integrated Framework).
- **And through specific development programs**
 - Improving mango export competitiveness (NTF II - CBI/ITC),
 - PDMAS (World Bank),
 - Program for Building and strengthening Trade Capacity (PRDCC II) under the 10th EDF (European Union)
 - USAID in management of small producers in Bio-production



4 - Initiatives to improve competitiveness of the mango sector

- Support the creation of a sector level institution (CFAHS) which includes all stakeholders in the horticultural sector including the Mango.
- Support for the implementation of two pilot cooperatives grouping small producers in conformity with applicable business rules (OHADA)
- Support to eliminate parasites (fly *Bactrocera Invadens*) and diseases (anthracnose, termites and other pests) including working with packaging center IFLEX
- Training program for best practices in the conduct of orchards, packing stations and control techniques and post-harvest crop
- Technical training for small producers to improve the quality of traditional plantations,
- Certification program quality



5 – INITIATIVE TAKEN FOR THE COMPETITIVENESS OF THE SECTOR

2 - In the Transformation field

- ASEPEX / ITA for mango processing: Financing Integrated Framework /
 - *Pulp pasteurized mango jam, mango marmalade, Drinks with mango, dried mango natural semi candied mango, mango pulp, canned mango, mango vinegar*

Interest: reducing post-harvest losses, difficulties conservation and reduction of losses due to fruit fly.

Constraints to overcome: *seasonality of production, Lack of an organized tour for the supply of quality mangoes, mango market Ignorance transformed Lack of funding equipment and packaging.*



5 – INITIATIVE TAKEN FOR THE COMPETITIVENESS OF THE SECTOR

3 - In the Marketing field:

Constraints: Small producers are subject to conditionalities outsourcers: The sale of most of the products from Senegal to Europe is made on consignment in exchange for a commission of 10% of the sale price.

This system sales is explained by the lack of cash flow businesses control the mango industry in Senegal in terms of regularity of quantities and qualities of goods sent.

Initiatives taken:

1. Contacting exporters with buyers: Case EANGDS operator in Senegal HALLS Rungis in France. Much work remains to be done to delude these updates in relation
2. Training of financial advisors to assist exporters in foreign markets
3. Promotion of the mango “Origine Senegal”



5 – INITIATIVE TAKEN FOR THE COMPETITIVENESS OF THE SECTOR

3 – In the Marketing field

- Created by ASEPEX regional pole Export to identify the exportable offer, in mango particularly

LEGAL ASSISTANCE:

Development of model contracts protecting producers and exporters.

Mediation and conciliation

Support in the world shows fruits and vegetables such LOGISTICA





5 – INITIATIVE TAKEN FOR THE COMPETITIVENESS OF THE SECTOR

4 - The Government Policy

- The mango is retained as a product with growth under the Accelerated Growth Strategy (SCA): job creation, income diversification in rural areas, foreign exchange earnings and the recovery of imbalance Commercial,
- With APIX (Investment Agency in Senegal), the government creates an enabling environment for investment through a new investment code and the status of “Franche company” to improve the competitiveness of the sector investors
- Partnership Government of Senegal / ITC / CBI under the NTF 2 makes mango product Pilot strategic export



6 - CONCLUSION

To maintain gains and improve the competitiveness of the mango:

- **Proposal for Implementation at the government level, a national program of fight against fruit fly,**
- **Proposal to reproduce the NTF program mode on other promising sectors for growth, such as cashew, melon, banana or peanut;**
- **Certification proposal orchards based on the respect of the technical routes and protocols fight against fly;**

The optimal solution of the problems of the sector Mango, through the design and implementation of a technical route, accompanied by a program upgrade on good agricultural practices, quality management throughout the chain production: ASEPEX organizes industry players in this way.

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6 - CONCLUSION

Some Results of the take initiative into the NTF 2 projet

- Improving the intrinsic quality of Senegalese mango,
- Increased mango production (10,000 + tons) in 2012,
- Increase the volume of exports of mango over 1,000 tons in 2012,
- Effective implementation of a monitoring unit on mango, which includes all stakeholders in the sector,
- Greater professionalization of the sector, with actors trained in technical quality and conduct of farms,
- Better promotion of the label "Origin Senegal",
- Organization with ITC and CBI the first "Mango day" in October 5, 2012: this multi-player space has formalized approach and develop recommendations to improve the competitiveness of the sector.

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**THANK YOU FOR YOUR VERY KIND
ATTENTION**

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