



Fresh Mangoes Overview

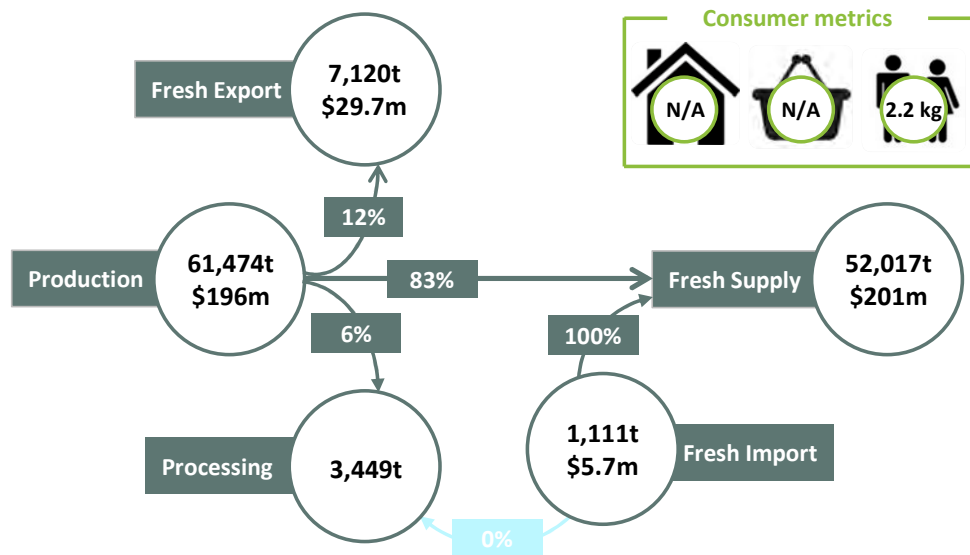
As a tropical fruit, mango production predominantly occurs in the North of Australia, particularly in Queensland and the Northern Territory.

For the year ending June 2017:

- **61,474 t** was produced.
- The value of production was **\$195.7 m** while the wholesale value of the fresh supply was **\$200.6 m**.
- The supply per capita was **2.2 kg**, based on the volume supplied.



Fresh Mangoes Supply Chain—Year Ending June 2017



Sources: ABS; AC; Australian Mango Industry Association (AMIA); CFVIWA; GTA; MP & DD (Freshlogic Analysis)



Year Ending June	2015	2016		2017	
	Value	Value	% YoY	Value	% YoY
Production (t)	66,087	63,791	-3%	61,474	-4%
Production (\$m)	\$ 190.7	\$ 210.3	+10%	\$ 195.7	-7%
Producing Trees (000 Trees)	1,063	1,217	+15%	-	-
Fresh Export Volume (t)	7,012	7,006	>-1%	7,120	+2%
Fresh Export Value (\$m)	\$ 25.2	\$ 30.9	+23%	\$ 29.7	-4%
Fresh Import Volume (t)	1,047	887	-15%	1,111	+25%
Fresh Import Value (\$m)	\$ 6.3	\$ 5.1	-18%	\$ 5.7	+12%
Fresh Supply (t)	56,220	53,880	-4%	52,017	-3%
Fresh Supply Wholesale Value (\$m)	\$ 198.6	\$ 214.9	+8%	\$ 200.6	-7%
Supply per Capita (kg)	2.36	2.23	-5%	2.16	-3%

Sources: ABS; AC; AMIA; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

Major Mango Production Areas

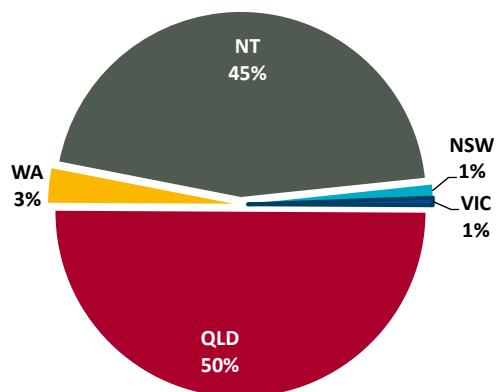
Mangoes are predominantly produced in the northern Australian states. The major producing areas include **Darwin** and **Katherine** in the Northern Territory; **Mareeba**, **Bowen** and **Bundaberg** in Queensland. It is also produced in **Kununurra**, Western Australia with small volumes coming from Victoria and New South Wales.



Source: AMIA



2016/17 Fresh Mangoes Production by State



Source: AMIA

Fresh Mangoes Seasonality by State

State	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	667							Low	Medium				
Victoria	407							Low	Medium				
Queensland	30,737				High	High	High	High	High	Low			
Western Australia	1,844				High	High	High	High	High	Low			
Northern Territory	27,819		Low	Low	High	High	High	High	High	High			
Imported	1,111	Low	Low									Low	Low
Availability legend			High		Medium		Low						None

Source: AMIA

Main Mango Varieties

There are a number of varieties grown in Australia, however production for the fresh market is dominated by 4 main varieties. These include:

Kensington Pride, also known as KP, is the most common mango variety in Australia, and accounted for **46%** of fresh production.

Calypso, a mango with yellowy orange skin with a deep pink blush, accounted for **17%** of fresh production.

R2E2 mangoes accounted for **22%** of fresh production.

Honey Gold mangoes accounted for **10%** of fresh production.

Other mangoes, such as Keitt, Tommy Atkins, Palmer and Nam Dok Mai, accounted for **5%** of fresh production.



Seasonality by Mango Variety

The seasonal availability of some major varieties is profiled in the table below.

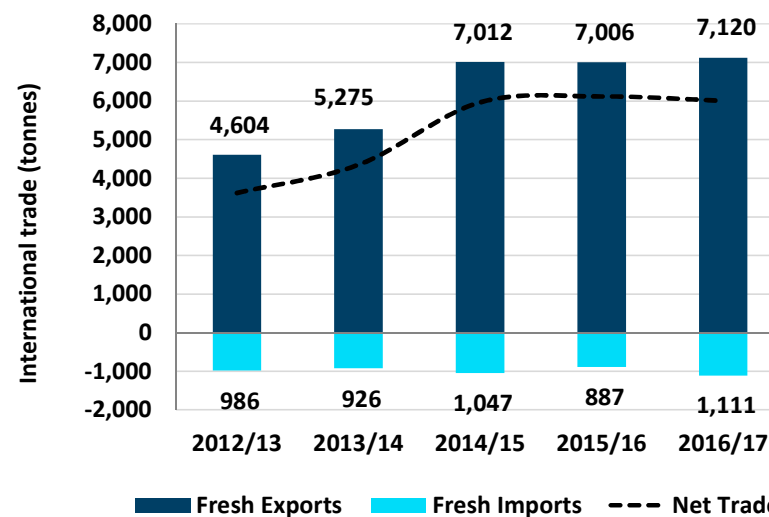
Variety	16/17 Tonnes	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Kensington Pride	26,692		High	High	High	High	High	High	High	High			
Calypso	9,864		High	High	High	High	High	High	High	High			
R2E2	12,766				High	High	High	High	High	High			
Honey gold	5,803				High	High	High	High	High	High			
Other	2,901				High	High	High	High	High	High			
Processing	3,449				High	High	High	High	High	High			
Availability legend			High		Medium		Low						None

Source: AMIA

Fresh Mangoes International Trade

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2017, Australia exported **7,120 tonnes**. The exports and imports over the last 5 financial years is profiled in the graph below, where imports are counted as negative tonnes.

Net Fresh Mangoes International Trade

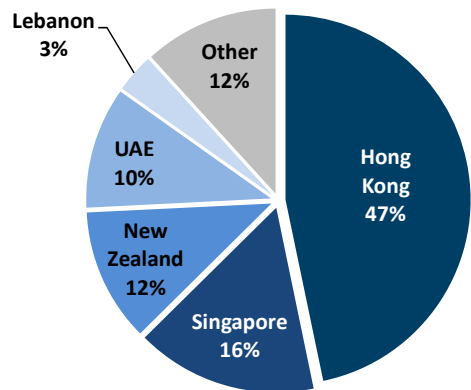


Source: GTA



For the year ending June 2017, **47%** of exported fresh mangoes were sent to Hong Kong, as profiled in the chart below.

2016/17 Fresh Mangoes Exports by Country



Source: GTA

Fresh Mangoes Imports and Exports by State

Imports by state destination (Tonnes)				Exports by state of production origin (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
New South Wales	517	507	518	Queensland	5,456	5,465	5,327
Victoria	313	170	337	Northern Territory	726	690	731
Western Australia	164	154	214	Victoria	350	351	466
Queensland	44	52	42	New South Wales	263	273	461
South Australia	7	5	1	Western Australia	1	3	39
Other	< 0.5	-	< 0.5	Other	216	224	96
TOTAL	1,047	887	1,111	TOTAL	7,012	7,006	7,120

Fresh Mangoes Imports and Exports by Country

Imports by country (Tonnes)				Exports by country (Tonnes)			
Year Ending June	2015	2016	2017	Year Ending June	2015	2016	2017
Mexico	382	420	403	Hong Kong	2,707	3,010	3,328
Thailand	367	237	342	Singapore	953	869	1,127
Vietnam	21	38	113	New Zealand	886	834	828
India	13	12	84	UAE	813	805	756
Philippines	221	136	78	Lebanon	422	423	244
Other	43	45	91	Other	1,231	1,064	837
TOTAL	1,047	887	1,111	TOTAL	7,012	7,006	7,120

Source: GTA

