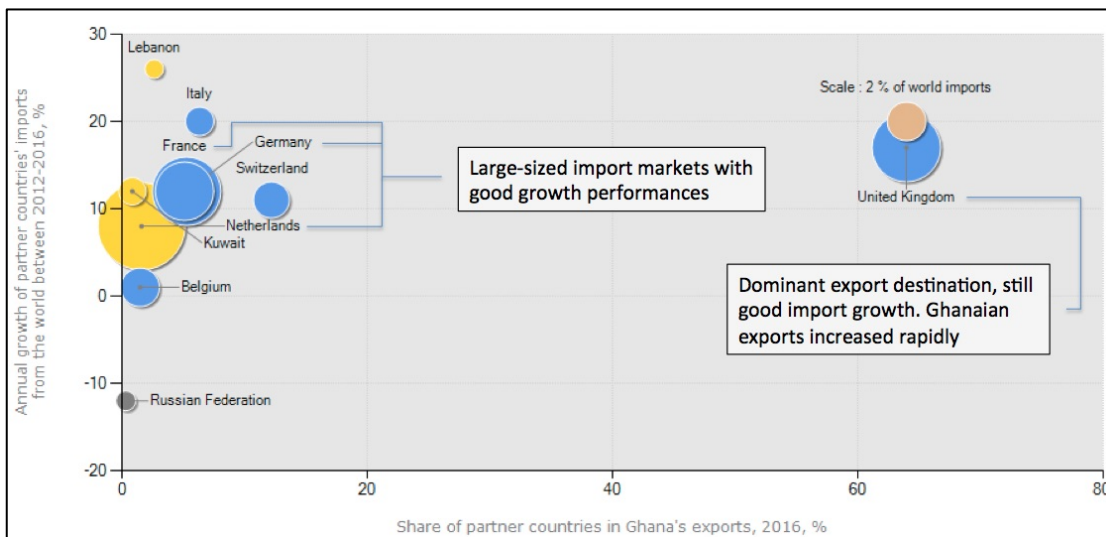


POTENTIAL MARKETS – MANGO

Potential growth at current top export destinations

- United Kingdom is the main destination for Ghanaian exports of mango, with 64% export share. The British market reached +17% average annual growth during 2012-2016. Growth from Ghana in U.K. was with +146% on average per year outstanding in this period. Ghana was the 3rd largest supplier to U.K. in 2016, after Brazil and Peru.
- All other large-sized (Western European) markets realized good growth performances from 2012-2016 as well. Ghanaian share in these markets is very low. Main suppliers to these markets are Brazil and Peru. Import tariffs for Ghana are similar as for the Latin American countries, while geographically Ghana has a little advantage to Western European markets.
- Among the top current export destinations Lebanon realized the highest import growth (+26%). However, supply is dominated by nearby country Egypt.

Figure 1 – overview of export shares from Ghana and global annual import growth rates (2012-2016) from top 10 export partners of Ghana for mango



Source: Trademap (2017).

Potential new markets

- Globally, import value of mangoes increased with +7% per annum on average from 2012-2016. Numerous countries realized good growth performances. Ghanaian opportunities for increase of exports arise mainly in Eastern and Southern European countries.
- Poland and Czech Republic both reached +22% average annual growth during 2012-2016. Main supplier of these markets is Brazil, while Peru had significant shares there as well. Ghana can compete in these markets with the Latin American suppliers based on geographical location and tariffs (similar at 0%).
- Import growth in Spain (+14%) and Portugal (+13%) increased steadily as well from 2012-2016. Again, Ghana must be able to compete with the (dominant) Latin American supply in these countries.

Table 1 – selected potential growth markets for Ghana (based on import value > 5 million USD, geographical distance and import tariffs compared to current suppliers)

	Average annual growth '12-'16	Import value 2016 (USD thousand)	Ghana's share '16	Leading suppliers
Poland	+22%	15,246	0%	Brazil (28%), Spain (24%), Germany (13%), Peru (9%)
Czech Republic	+22%	6,672	0%	Brazil (38%), Peru (14%), Germany (11%)
Spain	+14%	71,177	0%	Brazil (48%), Peru (28%), Mexico (5%)
Portugal	+13%	50,323	0%	Brazil (38%), Spain (36%), Netherlands (22%)

Source: Trademap (2017).

- Continue strong growth performance in large and increasing market **United Kingdom**. Try to increase shares in other Western European markets, which are large in size and still growing.
- Discover possibilities in Eastern Europe: **Poland and Czech Republic**. Enter larger-sized markets **Spain and Portugal**
- as well and try to compete with Latin American supply.

