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EXPORT PROMOTION PLAN

Global Quality & Standard Programme - Vietnam

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Abbreviations

AgroTrade	Agro Processing and Market Development Authority
EU	European Union
FAO-Stat	Food & Animal Organization – Corporate Statistical Database
GQSP	Global Quality & Standard Program
HWT	Hot Water Treatment (Immersion)
ITC-Trade Map	International Trade Centre-Trade statistics
MARD	Ministry of Agriculture & Rural Development
MRD	Mekong River Delta
MRLs	Maximum Residue Levels
SECO	Swiss State Secretariat for Economic Affairs
SIAEP	Sub-Institute of Agricultural Engineering and Post-Harvest Technology
SMEs	Small and medium Enterprises
SOFRI	Southern Horticultural Research Institute
SOPs	Standard Operating Procedures
UN Comtrade	United Nations International Trade Statistics Database
UAE	United Arab Emirates
UNIDO	United Nations Industrial Development Organization
USA	United States of America
VINAFRUIT	Vietnam Fruit & vegetables Association
WHT	Vapour Heat Treatment

Introduction

This Export Promotion Plan for the Vietnamese mango was prepared within the framework of the Global Quality & Standards Programme in Vietnam (GQSP-Vietnam), which is part of a regional GQSP-South Asia, funded by SECO (Switzerland) and implemented by UNIDO.

The Global Quality and Standards Programme is a strategic partnership between SECO and UNIDO to promote trade and competitiveness through strengthening the quality and standards compliance capacity to facilitate markets for SMEs in eight priority countries.

The GQSP-Vietnam focuses on “Increasing quality and standards compliance capacity of Mango value chain in Mekong River Delta”. In particular, the Programme strives to diversify the Vietnamese mango export markets.

1. The value chain

A recent analysis of the Vietnamese mango industry capacity, conducted by the international mango value chain expert, Mr. Peter Johnson¹, highlighted a series of criticalities along the value chain that make most of the production unable to comply with the technical & quality requirements of many international markets.

1.1. The Production

Mango is the second main tropical fruit in Vietnam, after bananas, and is grown almost everywhere in the country. The largest production takes place in the Mekong River Delta-(MRD). A total of 87,000 hectares are dedicated to mango cultivation, of which 41,800 hectares (equal to 48% of the total) are in the MRD². Production in the MRD area is estimated to be more than half million tons³ per year. Total production has grown steadily in the past years, going from 583,300 tons in 2010⁴ to 893,200 tons in 2020.

Mangoes are produced by small-scale farmers, whose average plantation size is less than 1 hectare (ranging from 0.3 ha to 2 ha). The fragmentation of the production unit is a substantial limitation to the availability of large quantities of homogenous quality. Aggregation of the farmers in cooperatives would be crucial to overcome this limitation and to give some advantages to the farmers such as group purchasing, more extensive and effective training in best practices, management of large orders and so on. There are already some cooperatives like Cat Hoa Loc Coop, My Xuong Coop and Hoa Loc Mango Coop. But the diffusion of this form of association is still very limited and those already established are still facing issues in terms of management, funding and collective procurement.

The fertilizers and chemicals are inappropriately used across the industry due to poor advice,

¹ Mr. Peter Johnson is an Australian mango value chain expert, associated with Griffith University, in Queensland.

² MARD: Vietnam is the 13th biggest mango producer in the world.

³ Southern Horticultural Research Institute (SOFRI)

⁴ FAO Stat

lack of technical expertise and equipment.

The best agricultural practices are not adopted by most of the farmers, with some current practices detrimental to fruit shelf life and quality. This lack of knowledge reduces shelf-life, increases disease level and the risk of exceeding MRL and impacts on mango's saleability.

One of the main challenges will be to motivate farmers to produce mangoes that comply with international requirements. The feed-back from export market is quite poor and today the knowledge of the farmer of the outcome of his efforts ends at the gate of the plantation, where his mainly concern is to find buyers for his mangoes when they are ready and get the most profitable price.

It goes without saying that the farmer will embark upon a virtuous and certainly very demanding path only when he receives an economic benefit and an adequate motivation. That is when the buyers/exporters remunerate his correct agricultural practices (and costly certification) with a fair price for a compliant produce.

The basis of this mutual understanding and engagement should be a written contract in which the buyer undertakes to purchase a certain quantity of produce, compliant with certain quality characteristics, at a fixed price and the farmer undertakes to follow the best practices to obtain a produce suitable for export.

As in other Asian producing countries, also in Vietnam it will be essential to reduce the fragmentation of mango production. Based on the principle "*Cooperate to compete better*", some Asian countries have aggregated smallholders into cooperatives and linked cooperatives with each other. This process has generated an overall improvement in quality. Only the collective and planned effort can make it possible to achieve this goal.

1.2. The inland transportation

This section of the value chain shows inadequate means of transport from farms to packhouses and from packhouses to treatment plant facilities; often the transporters use inappropriate and overloaded crates/cartons; furthermore, the lack of cool chain within the supply chain affects the quality of the produce and potential shelf-life.

1.3. The Packhouses

Pack-houses are characterized by basic structure and basic SOPs. In fact, investment in the recent years have been very low. Most of them don't have grading, fruit washing, desapping and HWT facilities. The lack of quality management greatly impacts on quality and saleability of the produce. Some packhouses have established partnership with exporters and have invested in VHT facilities, packing lines, cool rooms and accreditations.

1.4. Support Service providers

There are several supporting institutions and business that have influence over the mango value chain.

- Academic institutions and R&D institutions, such as Viet Nam Academy of Agricultural Science (VAAS) in MRD, Can Tho University.
- Technical and vocational training institutions such as Dong Thap Community College, the Faculty of Food Technology, Faculty of Agricultural & Fisheries Plant Science & Plant Protection.
- Financial services: access to credit is crucial for all actors along the value chain. State Bank has implemented a number of credit programs, aiming at facilitating the access to credit and reducing the request of collaterals in particular for farmers.
- Official Agricultural Extension system provides mainly training and dissemination of information. Interestingly the Organization in a transition from production-oriented system to market-oriented system. However, the organization will require substantial support to complete this process.
- Providers of different mango treatment services: HWT, VHT and Irradiation. THW has proven to be an effective, quick and cheaper way of treatment. Unfortunately, there are no registered plants so far. There is about a dozen of different companies/plants that provide VHT or Irradiation treatment.

1.5. The exporters

There are several different business models for exporters operating in Vietnam, some have their own packhouses some of these including VHT facility. Most of the exporters operate as independently from the packhouse's and just act as the intermediary between the importer and packhouses, they are also responsible for organising the necessary phytosanitary treatments and documentation need for export.

The level of control over the product quality and treatment varies greatly between businesses for almost as a broker with little to no contact with the product, to the packhouse operators who can greatly influence the process under which the product is handled.

The closeness of exporter / packhouse relationship is very important. Exporters' knowledge of the cool chain management is limited.

However, within this challenging "picture", which affects the image that the Vietnamese mango industry projects on international markets, there are some **areas of excellence**, where mango farmers, processors and exporters have instead undertaken a production and export virtuous process based on quality and compliance with international requirements. In fact, Vietnam is exporting, albeit still in limited quantities, fresh mangoes to markets with strict technical requirements and high-quality standards: Japan, Korea, Australia, EU and USA.

The mango promotional campaigns will have to counterbalance the above-mentioned challenging issues, turning the spotlight on these **mango industry champions**. Their lives, stories, their passion will be the backbone of the promotional campaigns.

2. The export patterns

2.1. The need of diversification

Mango is mainly consumed in the producing countries. Only a limited percentage of the total production (4.5%) is exported⁵. Vietnam is exporting 20% of its total production, positioning itself amongst the most dynamic exporters. The exporting countries are numerous and the competition on the international market is very tough.

Mango is a delicious but delicate fruit, with a limited shelf life and does not easily withstand the shock of long transport. For this reason, mango is firstly exported to neighbouring countries in the region.

90-95% of the total Vietnamese export goes to China. A set of elements has led to a surge in exports to this destination since 2013: first the dimension of the market, where, despite its local production (2.5 million tons / year⁶), the import of mangoes from neighbouring countries has increased year after year to meet the growing internal demand; then the geographical proximity which contains the transportation cost and helps with the natural limitations of the shelf-life; finally, the phytosanitary, MRLs and quality low level of controls at the cross-border trade.

On the one hand, this intense flow of trade has boosted the development of an important and efficient “export machine”, by involving farmers, transporters, pack-houses, service providers and exporters who are now able to meet the requests of Chinese buyers/importers almost all year round.

But on the other hand, it has objectively slowed down the pressure for the production improvement process, in terms of best practices dissemination, which would enable the sector to comply with the requirements of other more remunerative markets. In these markets the buyers, distributors and final consumers pay close attention to the safety of the fruit they buy, as well as to appearance, aroma, texture and of course to the price.

The remaining 5% of exports goes to Russian Federation, UAE (Dubai in particular), USA, and South Korea. The quantities exported to other markets such as Lithuania, Australia, HK, Japan, Qatar remain quite limited⁷.

2.2. Export strategy

A market assessment evaluation conducted by this Project in 2020 and updated in 2021, suggested a two-phase strategy: during the first phase it would be advisable to concentrate the export efforts on the regional markets:

- Firstly, South Korea. Even though the size of this market is still around 20-22,000 tons per

⁵ 2019 global production 55.8 million tons (FAO Stat). 2019 Global trade 2.55 million tons (UN-Comtrade).

⁶ FAO Stat

⁷ ITC-Trade Map Statistics

year, it has seen a steady growth trend in the past few years. Furthermore, the final consumers are not price driven and are interested in premium quality mangoes. Therefore, the Vietnamese exporter, in a position to ensure quality compliant mangoes, can get an interesting profit. Being a growing and profitable market, South Korea has attracted the interest of several suppliers and therefore the competition is tough. However, the Vietnamese exporters have increased their market share and it is likely that the organization of promotional campaigns would support a further expansion and consolidation of the Vietnamese market position.

- The second market is Japan. The size of this market is much smaller than the Korean one and the recent growth trend has not been encouraging. However, the final consumers preferences are very similar to the those of the Korean consumers and also Japanese people are not price driven buyers. Therefore, the efforts to supply premium quality mangoes to Korea may facilitate the sales in Japan. Promotional campaigns, with a budget proportionate to the size of this market, can definitely support the consolidation of the Vietnamese mangoes share.
- The third market is Australia. Presently, the final consumers preferences are strongly oriented towards the high-quality local production (about 70,000 tons last year). However, there is an interesting and untapped entry opportunity during the off-season window (April-August). So far, the potential of this opportunity has not been adequately exploited. In fact, the quality of mangoes supplied by other producers does not meet the preferences and interest of Australian consumers. The project suggested a two-phase entry strategy: initially focusing on the specialised tropical fruit retail to gradually stimulate the interest and confidence of the Australian consumers and indirectly that of the large retail companies. Then upgrade the commercial offer by focusing on the giant retail, once the Vietnamese mangoes have acquired a good reputation amongst the final consumers. Modern retail prefers yellow-blushed skin mango, of impeccable good quality.
- The fourth market in the region is represented by the Emirates, and in particular by Dubai. The size of this market is interesting. The leading suppliers are India and Pakistan, which are leveraging on both the proximity and the important presence in the country of their respective communities. The traditional fresh market outlets, which cater to a large portion of the demand, are price driven and meet the medium-low income consumers. While the well-organized modern distribution infrastructure caters to the demand of medium-high income consumers, more interested in aspect such as quality, health and nutritional values of the produce. This segment of the market will require an adequate promotion support, to inform the final consumers about the superior characteristics of the Vietnamese mangoes.
- Finally, the Chinese market, which still represents the vast majority of Vietnamese exports and therefore deserves a separate discussion. The Project has highlighted some structural limitations of the export of Vietnamese mangoes:

- (i) the lax border controls (which will soon be stricter) have indirectly facilitated the export of a product that barely complies with the technical and qualitative standards of the country's regulations. However, this product has met the expectations of importers, wholesalers and final consumers. So, it's a win-win situation for everyone at the moment.
- (ii) The lack of visibility of the final consumer has hitherto prevented suppliers from understanding their preferences and consequently informing the supply chain properly.
- (iii) The poor monitoring of distribution and interaction with final consumers has effectively deprived the Vietnamese mango of its identity as a produce, which therefore does not adequately distinguish itself from the Cambodian, Burmese or even local ones.
- (iv) It does not appear that the Vietnamese mango has yet reached modern retail in the most important Tier I, II and III. In this segment, final consumers are guided by appearance, quality, information on the correct production process and nutritional values. And they have greater confidence in imported mangoes.

Despite the growing and important export flows, this set of factors should lead to a collective medium-long term strategic rethinking. A focus on modern retail and online commerce will require periodic promotional campaigns to inform final consumers and stimulate their attention towards Vietnamese origin.

The second phase of the export strategy concerns the two largest markets globally: the US and the EU market. Both have an attractive size for exporters but have a high level of requirements and some complexities that are not easy to solve.

The USA market with nearly 600K tons of mangoes imported in 2020 is the largest globally. The USA produces only a very small quantity of mangoes in Florida, estimated by FAO at around 1,000 tons per year. The market is heavily influenced by Mexican production. The country takes advantage of the logistical proximity, the numerous large and well-organized plantations and the low cost of labour. A truck can reach a destination in the Sun Belt in a matter of days. In addition, some supermarket chains are owned by Mexican companies which favours the leadership of this supplier. When the season ends in Mexico, mangoes arrive from other Central and Southern American suppliers, that ensure availability on the shelves all year round.⁸

⁸ Mango Crop Report, National Mango Board 19-11-2021

Mango seasonality in Central and South America

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Mexico												
Brazil												
Peru												
Ecuador												
Haiti												
Guatemala												
Dominican Rep.												

Also due to this regional predominance, in addition to the higher transport costs, the presence of mangoes of Asian origins, such as India, Pakistan, Thailand and Philippines have been marginal so far. Indian and Pakistani mangoes are confined to the large ethnic market and are not featured on modern retail shelves. Thailand and the Philippines exclusively supply dried goods. Vietnam has performed remarkably since the opening of the US market. As far as we can understand, the final consumers of Vietnamese mangoes are also mainly in the Vietnamese community in California.

The EU market with its approximately 370K tons consumed annually is also very attractive for mango exporters. This market also has a high level of requirements. And an extreme attention to the quality of the product. It should also be seen as an organized aggregation of different markets, where final consumers historically have different habits and food preferences. This factor involves a more complex entry market analysis.

The European market has for several years been largely dominated by Central and South American producers, who have managed to influence final consumer preferences towards the varieties grown in these countries. In particular, the varieties proposed by Brazil which are displayed on the shelves almost all year round. The presence of suppliers from West Africa is also important. In Europe there is a small production in Spain. As in the USA also in Europe the supply of Asian producers such as India and Pakistan is confined to the large ethnic market. Their presence in modern detail is very marginal and occasional. As well as that of the Thai mangoes.

3. The promotional campaigns

The lack of the long-term entry market strategy on the part of exporters, as well as the lack of institutional support through promotional campaigns⁹, have left room for other producing countries with more aggressive export policies, to occupy important shares in profitable markets, especially the North-East Asian¹⁰ and Middle East markets.

It is highly unlikely that private sector exporters will be able to allocate financial resources to promote their fruits and thus recover the advantage gained by their competitors. They will need

⁹ GQSP-Vietnam, indication from 25 export companies to a questionnaire (August 2020)

¹⁰ <https://andina.pe/ingles/noticia-peruvian-mangoes-reach-major-department-store-chain-in-south-korea-829419.aspx>

to be supported in the short-medium term by promotional campaigns that we will describe here below.

3.1. A story to tell final consumers

A general consideration: unlike industrial products, the promotion of agricultural products plays above all on the pleasantness of appearance, on information on organoleptic qualities, on the confidence that inspires the figure of those who have cultivated the product and finally on the taste of the product. Generally, these techniques help the product to win the trust of the final consumer. Both because the memory of the latter tends to fade, and because the competitors organize the same promotional initiatives, it is important to plan to periodically repeat the promotion of the Vietnamese mango, adding new elements that can again attract the attention of final consumers.

In many producing countries the arrival of the mango season is a celebration. Biting into the juicy fruit is regarded by many as a happy memory that lives on and inspires unique and popular dishes. The stalls in the streets are filled with mangoes, there is a widespread sense of joy / festivity in the purchase of this delicious fruit. Tourists have been tasting mangoes and perceived the people's enjoyment in the tropical countries they have visited. The promotional campaigns must be able to recreate this feeling of joy, wherever they are organised.

Mango is a widely recognizable fruit around the world. One of the most well known and most popular tropical fruits. The mango, also called the **King of Fruits**, is considered by many to be one of the fruits that best represents the producing country. Therefore, it is imperative that the quality of the exported product is always good and constant as the product communicates/reflects the passion of and the care taken by the people from the orchard to the shelves.

Some producing countries have greatly developed their tropical fruit value chains, including the mango one, and are able to supply produce compliant with the international requirements. Thanks to these results they have achieved important shares, even in distant/far markets.

In an international scenario where competition is very tough, to conquer a share of the markets will require the outline of promotional plans to support the medium-long term strategy that concerns both the private sector actors (farmers, pack-houses and exporters and their sector associations) and the public sector, i.e. the institutional export support agencies.

Like any promotional campaign, the mango campaign must "tell a story" that stimulates the interest of the buyers initially and ultimately, that of the final consumers. In the case of mango, the story will unfold around some essential points:

- (i) The strict quality control in the whole production process, emphasizing the country's infrastructures in charge of these controls
- (ii) The proper working conditions of the farmers and processors, the respect for the environment, so as to meet the expectations of consumers who are increasingly guided in their choices by these important aspects
- (iii) The passion, and not just the right profit, that drives all the operators,

- (iv) The central consideration for the health of the final consumers.

Some examples of this kind of communication are indicated in the below links.¹¹

Therefore, the strong message that this promotional campaign must pass is that in the areas of excellence in Vietnam there is a widespread quality culture.

The quality culture concept will be the foundation from which to enhance the organoleptic qualities of the product, such as its specificity in terms of aroma, flavour, texture, nutritional value (mango is a well-known source of vitamins C and E, niacin, potassium, iron and beta carotene). As said above, accordingly the product must be beautiful, without any visible defects on the outside and properly packed.

Generally, the commercial communication has a dual function: on the one hand it informs the final consumer about the benefits of the produce and its availability, on the other hand it guides them to the best way of using the produce to ensure their satisfaction.

In its formulation to be more effective the message should adopt the local language (even some slang words), the culture and social habits. This is not an easy exercise, because each market has its own specific characteristics. To bridge this gap, the exporter should involve the local buyer/partner to design the most effective approach.

It's also important that the exporter takes into consideration that he is not merely selling to the buyer, but he is actually selling to the final consumers through the buyer. Both have a common goal: to sell mangoes to the final consumer. That's why it is essential to know the final consumers habit and food preference.

3.2. Tropical fruit basket institutional promotion

Vietnam exports a large basket of fruits. It is important to leverage this aspect to project a more attractive image of the country. This image of a country with a strong agricultural connotation will be the setting for promotional initiatives aimed at mangoes.

Therefore, there will be a **“large spectrum”** promotion, showing a varied and very colourful world of tropical produce, labelled by an institutional slogan, immediately reconnectable with Vietnam as a country, which will have to be created.

¹¹ https://www.youtube.com/watch?v=SjSon3MJs48&ab_channel=Woolworths
https://www.youtube.com/watch?v=dNozLuofolJ4&ab_channel=QueenslandAgriculture
https://www.youtube.com/watch?v=ZmL-C2J0GB8&ab_channel=RattanaBoonprasert
https://www.youtube.com/watch?v=gB1rfwDGB0o&ab_channel=MarcaPer%C3%BA
<https://s3.eu-central-1.amazonaws.com/comandsons/global-fruit/GOLDFRUIT+--+Lidl.mp4>

Photo 1. Exported fruits from Vietnam



Photo: Courtesy of gettyimages

This “**blanket**” type of promotion will create the background for mango specific promotional event to catch the attention of the consumers.

3.3. Mango promotional campaign

The second level will focus on the King of Fruits, the mango and will require an articulated plan.

- The communication experts suggest that the structure of the message should reflect the so-called **AIDA** Model, which stands for (awaken) **A**ttention, (generate) **I**nterest, (kindle) **D**esire and (stimulate) **A**ction¹².
- A striking mango slogan will play an essential role. As the final consumers are exposed to a “tsunami” of ads in one day,¹³ it will be necessary to create catchy mango slogans¹⁴.
- If it’s feasible, the organizers of the promotional campaign should engage a popular person in the destination country, as testimonial/influencer of the incredible and unique quality of the Vietnamese mango.

3.3.1. In-store marketing

Very often (typically) food producers promote their products in some relevant outlets. If the size of the supermarket allows it and if the store management agrees, the display can be organized

¹² CFI-Corporate Finance Institute: The Attention, Interest, Desire and Action model in advertising.

¹³ RED CROW Marketing Inc. Data from clinical test. 10-09-2015

¹⁴ Some examples from other countries: Ready, Get, Mango! Mango Mania! Be as sweet as a mango!

through the shelves, either for a single produce or for a basket of fruit. For example, these 2 photos show different size/levels of promotion of the apples cultivated in a specific region in northern Italy. The suppliers and the management of the concerned department agreed to create a distinct display, with panels advertising the specific produce.

Photo 2. Promotion of the apples cultivated in northern Italy



Source: Courtesy of Terra è Vita

The following photo shows an example of specialized promotional campaign on mango: the 'Mango Mania' Fair was organized at Doha Lulu hypermarkets by India. Visitors found a variety of mangoes and mango processed products on offer during the week-long celebration. The consumers were invited to taste the fresh and processed mangoes. The event was organized by the Indian Embassy in Qatar. The dimension of the Indian mango business for the store justified the agreement of the management to allow the creation of this quite large promotional stand.

Photo 3. The specialized promotional campaign 'Mango Mania' Fair at Doha Lulu hypermarkets



Source: Courtesy of Qatar Buy&Sell

Sometimes the management of the store has a more conservative opinion about the organization of these kinds of events within the store. In this case the food producers realize/create the “promotional corner” in the aisles of a shopping mall, near the entrance of the supermarket. This solution actually is more flexible and allows a more structured and attractive display.

There is a third option represented by renting for a short period the pop-up store, located in the proximity of a shopping mall, thus with an intense passage of consumers, where it would be possible to freely promote the Vietnamese fruit/mango, organize meetings with media, organize B2B, attract the attention of the buyers of the supermarkets.¹⁵

It goes without saying that fresh fruit producers from different countries are also organising promotional events to keep the attention of the final consumers alive. As the Vietnamese promotional campaigns will be in good company, the first event has to make a “**bang**” to stand out from the others.

The mango promotion event should leverage on the strong bond between mango and the culture of the country that produces it.¹⁶ The promotional initiatives should recall some typical aspects of Vietnamese culture. At the events inside the retail outlets, it will be necessary to recreate an eye-catching, unmistakably Vietnamese display:

- The staff, possibly recruited from within the local Vietnamese community to reduce the language barrier, will wear the traditional Vietnamese clothes and conical hats.
- The traditional Vietnamese music played in the background will ensure an authentic

¹⁵ <https://allterrain.net/case-study/mango-pop-up-store/>

¹⁶ <https://www.mango.org/blog-the-mango-experience/>

atmosphere to the presentations.

- The decorations of the promotional corner will recall traditional Vietnamese designs.
- Ripe and abundant mangoes will be displayed evenly on the shelves, possibly alternating different shades of colours.
- Different media, such as video clips, panels, leaflets will complete the scene by informing the consumers.

Photo 4. An eye-catching fruit display at the events inside the retail outlets



Source: Courtesy of Publix

3.3.2. Media strategy campaign

Apart from organizing sampling and demos of mangoes, it's advisable to get out the message that mango is useful not just as a fruit, but also as an ingredient. Mangoes can be eaten plain or put in salads and desserts. They can be added to meat and fish dishes because they're tenderizers. If it's feasible the organizers of the events should offer also the possibility of tasting traditional Vietnamese dishes.

The overall structure of Vietnamese Mango communication will have to travel on several channels:

- To start publishing/publication of an online mango newsletter with news and updates from the mango sector, like:
<https://mango.org/the-fresh-slice-newsletter/>,
<https://www.industry.mangoes.net.au/news-events/mango-matters/>,
- To create a blog dedicated to mango, that is an online diary with contents written in chronological order. It is much more challenging than a website, but thanks to its constant evolution, the interaction with subscribers is much more effective.
<https://www.svz.com/news-and-blog/mango-king-of-the-fruits>,

<https://mango.org/blog-mangos-in-india/>

<https://naatikmexico.org/blog/mango-season-in-mexico>

- To sponsor/participate in cooking shows, where there will be the opportunity to highlight the great combination with meat and fish recipes.
- To offer well documented articles for the food pages of the local newspapers in the target markets.

On the one hand this articulated communication will inform, inspire and educate consumers about the culture, flavour, and nutrition of one of the world's most versatile superfruit, and on the other hand will facilitate their reconnection with the Vietnamese mango varieties.

Finally, COVID-19 pandemic has adversely affected the regular execution of the promotional events, in 2020 and 2021 which involve a large number of participants. It is not known whether the situation improves in 2022 and there will be a relaxation of the present people movement and gathering.

4. Implementation arrangements

As said above the need to promote and diversify the Vietnamese mangoes from the competition is quite strong. A collective and coordinated effort, involving public and private sectors, to support the initiative of the export business is a pre-requisite to ensure effectiveness and return of the investment in terms of increase of the export.

At the moment, the involvement of AgroTrade, the operational arm of the Ministry of Agriculture and of Vinafruit, representing operators in the fruit sector and of private mango exporters is expected.

4.1. AgroTrade role

Agro Processing and Market Development Authority (AgroTrade) under MARD plays several essential functions, among others:

- To ensure the close coordination between state ministries, agricultural sectors, local authorities, associations and businesses to better organize production and market in order to make the most of the opportunities offered by the domestic and the global markets;
- To advise the agricultural sectors facilitate the link between AgroTrade's functions are as the solution for the present situation of the output for agricultural products, connecting the production to the global market and developing products in global value chains, ensuring fair trade;
- To propose and manage the implementation of new legal framework, policies, international commitments, and requirements to further develop the markets abroad.
- To coordinate and organize the export promotion of the agricultural products.
- To Develop the national branding strategy and support the private enterprises to develop their own brand.

In light of the above, AgroTrade is in a position to ensure political and financial coverage for the promotion of Vietnamese mangoes abroad. AgroTrade will ensure that the contents and methods of the promotional activity comply with the guidelines defined by the Ministry of Agriculture. It will also ensure the necessary link with the promotional policies defined by the Ministry of Trade and the involvement of the structures of the Ministry of Foreign Affairs present in the target markets.

4.2. Vinafruit role

The Vietnam Fruit Association (Vinafruit) established in 2001 is a non-governmental organization, representing different enterprises operating within the fruit industry. Vinafruit provides an interface between government and industry to enhance cooperation between the different fruit enterprises in Vietnam. Vinafruit seeks to enable Vietnamese fruit industries to be more responsive to domestic and international market and wishes to assist Vietnamese fruit industries to integrate into international agricultural markets. (Nissen et al 2014). It's a fruit "blanket" association which also provides its members with training services, information and represents a neutral meeting point for sharing the growth experiences of its members.

Thanks to its role as representation of the operators of the mango industry and as a link between the latter and the government, Vinafruit will carry out the function of:

- Collecting and amalgamating the indications expressed by the exporting companies,
- Outlining a strategy aimed at specific markets, and
- Ensuring the organization of various operational phases.

Its responsibility will encompass the production of the promotional material and the definition of the intervention plans agreed with the operators. It will also ensure, through local importers, in partnership with the Vietnamese exporters, the on-site organization of the initiatives.

Finally, in coordination with AgroTrade, it will involve the Trade Offices to contribute to the organization of promotional events.

4.3. Trade Mission abroad

The role of the Vietnamese Trade Missions in the designated countries is essential for the successful mango promotion. The support of the missions will cover areas such as market intelligence, identification of potential partners, localization of the most relevant venues for the promotional events, coordination of the organizers of the events, sensitization of the Vietnamese community in the country towards national tropical fruit promotional events. Therefore, the involvement and engagement of the Trade Offices is a must.

4.4. Fostering a mango representation in Vietnam

There are some national agriculture cooperatives in Vietnam. Some of them, located in MRD, are focused on mango production and market demand. In Dong Thap province there are also some Farmer's Clubhouses where likeminded farmers share their experiences.

Considering the positive experience in some mango producing countries, who fostered the establishment of mango associations, a sort/kind of private-public partnership amongst value chain actors, academia and governmental institutions, it would be advisable to put the seeds of a specific mango cell (to become a mango association) within Vinafruit. A group of visionary operators who have at heart the dissemination of the culture of quality among its members and will contribute to the proper and punctual management of mango promotion abroad.

Examples of this kind of representations can be easily find in different countries. For example, in Australia, a country that produces about 70,000 tons/year of mangoes and exports 10-15% to several regional markets, the local mango association, AMIA, provides several services to its members in areas such as marketing, market access, communication, public affairs and biosecurity. The same functions are performed in Thailand by Thai Mango Growers Association, in Peru by APEM, in Ecuador by Mango Ecuador Foundation, to name a few.

4.5. Personnel, resource requirements, finance

In order to ensure the effective implementation of a promotional strategy, it will be necessary to create a small section dedicated to the promotional activities related to mango, and with the medium-term goal of becoming the reference point for Vietnamese exporting companies. Ideally this mango section should be placed within the Vinafruit organization.

The initial structure of the mango section should be composed of:

- **A communication expert**, who will be responsible for the realization of the contents of the promotional messages and coordination of the physical production of the promotional material: videos, photos, drawings, leaflets and so on.

He will also be responsible for the creation of web pages dedicated to mango (initially as part of the present Vinafruit website), the creation of and contribution to a mango industry dedicated blog, relations through the social media, and provision of articles for specialized magazines.

It will establish relationships with the actors of the value chain to collect inputs and technical data and ensure the sharing and validation of the promotional initiatives. Finally he will consult the local importers in target markets to identify the most efficient forms of promotion in order to ensure a high return on the investment in terms of higher sales

- **A marketing expert**, who will monitor the trend of the markets, the performance of the competitors and provide the elements for identifying the markets on which to focus the promotion. This resource will also have to maintain relationships with the actors of the value chain to share the results of his analyses and compare them with the information that exporters receive from the markets.

His key mission will be to obtain the consensus of the value chain on some fundamental points: (i) the need to diversify the current export flow; (ii) the awareness that markets, other than China, have stringent requirements; (iii) the compliance with these

requirements is a necessary condition to be able to plan the penetration of these markets; (iv) the adoption of the culture of quality to achieve this objective becomes a compulsory choice.

These resources will be managed by **a Vinafruit executive** who will, among others, be responsible for (i) ensuring the effective involvement of the Vietnamese Trade Offices in the target markets, (ii) obtaining the commitment of exporting companies to support promotional campaigns with their products and (iii) ensuring their active participation in events. Vinafruit will provide the needed facilities for the proper functioning of the mango section like office, communication connections, organization of travel in the field on so on.

It is proposed that the cost of the mango section should be shared between Vinafruit and AgroTrade, and that the GQSP Project contributes to the start-up costs of the mango section with a seed budget. The costs of the promotional activities should be shared between AgroTrade, Vinafruit and the export companies.

5. Annex 1: Export checklist

This annex contains a sort of export checklist and is mainly aimed at SMEs who are considering starting a tropical fruit export business.

5.1. Export company self-assessment

The company management should compare the company skills with the international competitors. Identify the strengths and weaknesses, the opportunities and threats. They have to look into the company resources (human and financial) and tools and design a realistic plan of what the company can do. They need to think strategically and should try to imagine the company in 5-year time.

5.1.1. Some homework for the management.

The decision of starting the export belongs to the top decisional level of the company and requires the design of a strategy. The management will do some homework before designing the export strategy, set the goals and allocate human and financial resources.

The first question that the company management has to ask himself regards the reason for starting an export activity. Generally, export activities may take place for different reasons, which may be divided into:

Reactive:

- The company looks for business opportunity, following the example of other (successful) exporters.
- The company received a request for quotation from a foreign buyer.
- The demand from the domestic market is not going well and therefore the company looks for opportunities abroad.
- The company has an excess of production and looks for a market abroad to avoid engulfing/flooding the domestic market.

Pro-active:

- The company was established with the main mission of exporting goods, in this case the company puts the export share in its strategic development plan every year, to open new markets and generate profit.
- The company established a partnership with a foreign importer/distributor/buyer.
- National interest. Export is very important for the macro-economic scenario of a country. It generates foreign currency, which can be used for paying imports of goods and services. In turn companies are fostered to export with the support from governmental institutions, which however will not be sustainable in the long term.

The management must be aware that by initiating the export it is leaving a comfort zone, i.e. a market that it knows like the back of its hand, to venture into a world that it does not know yet and that could be hostile.

In fact, selling abroad is a completely different job from selling in the domestic market because:

- There are international rules to follow (like Incoterms) and international standards (technical and qualitative) to comply with.
- The evaluation of the international competitors is a time consuming and complex exercise.
- Foreign buyers have different needs.
- Culture, eating habits and preferences of the final consumers are different and they reflect in the local buyer requirements.
- The promotion activities are more complicated.
- The way of delivering the goods is more complicated and more costly.

Therefore, the first question a company management should ask himself is: **why should we?**

5.1.2. SWOT Chart

To help answer the second strategic question it's advisable that the company management conduct a kind of export self-auditing, following the traditional SWOT analysis pattern, where the internal assessment will focus on the company's strengths and weaknesses and the external assessment will focus on markets' opportunities and threats.

The internal analysis may involve/comprise:

- Human resource readiness:
 - (i) Evaluation of the management motivation, mentality and previous export experience to drive the company into the new venture.
 - (ii) Evaluation of how much personnel could be dedicated to the export activities only.
 - (iii) Resistance to the dissemination and adoption of a specific culture based on the understanding and respect of the foreign counterparts. If the management neglect to inform and train the personnel directly or indirectly involved, the export operations will be experienced/perceived as a headache.

(iv) Finally: the knowledge and diffusion of the English language.

- Financial resources: Assessment of the company's general financial situation and how much money can be allocated for export activities. As the company decides to enter one or more new markets where other suppliers have been already established, it will be necessary to invest in building its own image/brand. Therefore, the management needs to evaluate whether the company has enough resources to succeed or simply to survive in the venture abroad. It would be prudent to factor in that there will be no or very little return for the first 3 years.
- Management style:
 - (i) Dealing successfully with foreign realities will imply some proactive skills: modern management, constant control of the operation, attention to ideas from the lower level, communication across the company.
 - (ii) Standard Operating Procedures (SOPs) adopted.
 - (iii) Ideally the company should regularly conduct a benchmarking exercise against its direct competitors.
- Technology level: The export of mango/tropical fruit will involve the utilization of some facilities: grading, cold store, packing lines, product handling,

The external analysis will involve the export markets assessment:

- Geographical factor: proximity is the first driver.
- Dimension of the market and its growth potential
- Tariff and non-tariff barriers
- Study of the most direct competitors and their products. Product presentation, price positioning, distribution channels, advertisement and promotional activities. Reasons for their success.
- Average selling price.
- Buyer's profile.
- Distribution channels
- Whether the company selling unique proposition can reach the final consumers.

The management will assign a score to each of the above elements and be able to answer whether the Company is **S**trong enough to grasp the **O**pportunities that the identified markets are offering? And whether the company is able to remedy the **W**eaknesses before facing the **T**hreats (on which the company has no control).

In other words, the readiness of the company structure to cope with the challenges and workload that the new export activities will imply.

5.2. Export Market Assessment

5.2.1. Selection of the markets

It would be advisable to approach one market per time in order to control the required investment and contain the risks. The priority goes to those:

- Those geographically closest. The cost of transport has a significant impact on the selling price.
- Countries with economic and political linkages with the exporting country. An import friendly environment will ease the initial export efforts.
- With social, cultural and food habits most similar to the export country. Where consumers will appreciate/prefer more the quality of the exported product:
- With a proven potential growth.
 - (i) In general, the size of the demand is the result of the total local production (if any), plus the total import and minus the total export. In this calculation should be considered also the unsold-goes to waste produce. Which is a difficult data.
 - (ii) The growth trend is based on the historical series of data and the forecast made by specialized agencies, based on industry believes/feelings.
 - (iii) The exporter should neglect the markets with a down going trend because he is the last arrived and will not make any profit to sell his mangoes. He should stand-by in the market with a stable trend because the competitors are already fighting each other to keep their market share. He should actor that up-going trend markets attract more competitors. You will need to diversify your image.
- With adequate purchasing power: mango is somehow a luxury fruit.
- Where similar local production doesn't saturate the demand.

5.2.2. Competitors' analysis

The best way to fight against the competitors is to know them deeply. The exporter should:

- Analyse their products and identify the strong points and compare then with his strong point and assess whether they are better and whether he can compete on the quality.
- List the name and origin of the producers.
- Calculate their price construction.
- Study their advertisement and promotional activities.
- Understand their distribution channel choice.

5.2.3. Choice of the market segment

The import company in the country will guide the Vietnamese mango exporters in identifying the most suitable channel to sell your mango.

- Modern retail: in most markets this segment has become the main channel of distribution for tropical fruit, replacing the traditional small shops and reaching important volumes of sales. The specialized/dedicated buyers of the modern retail have an enormous influence

and dealing with them implies some selling skills:

- (i) The main chains of supermarkets (in particular in EU) have developed their own standards and they ask the fresh fruit suppliers to comply with them. This is the result of the high attention these corporates pay to the food safety. Complying with these standards is compulsory. One fails once and he is out for good, burning all the previous efforts.
 - (ii) Smaller chains of supermarkets may have less stringent requirements. Therefore, a newcomer with limited export experience in a specific market should initially approach the smaller retail companies. There are other factors that lean towards smaller retail companies:
 - Lower Profit margin: Retail giants have the advantage of moving huge quantity of items. That allows them to sell items cheaper than smaller retailers, but at a cost to the companies that deal with the retailer.
 - Impersonal: large retailer has so many manufacturers vying for its shelves that he may decide to stop stocking the produce of a supplier at any time and without anything more than a quick phone call or letter informing the supplier of the decision.
 - Tough competition: retail giants buy mangoes from different origins. If one specific origin doesn't sell well or doesn't attract the interest of buyers, they drop that supplier.
 - (iii) Due to the perishable nature of mangoes and the higher risk associated with export, international supermarkets rarely import mangoes direct, most opt to use a third party, either a broker or an import company are the most common systems. This allows the third party to vet the product on arrival, removing any fruit that is out of specification and sometimes repack the fruit for specific retail presentation. Often this will also include ripening the product to the stage required by the specifications.
- Most supermarkets retail fruit by the piece not by weight, therefore they require uniform specific sizing.

The modern retails require a long-term strategy. A strong relationship with an importer with well-established connections with the supermarkets' buyers. His role is essential as he knows how to meet the requirements of each buyer. Once the exporter starts to supply, he needs to continue to export, even if he is losing money. Continuity will build his reputation as a reliable supplier.

5.2.4. A single produce (mango) or a basket of fruits?

A basket of fruits offers more advantages than a single produce. It will be more attractive for the foreign buyers. It will offer the possibility of absorbing/spreading the market price fluctuations and possible less profit on more than one item. The exporter will be able to supply the foreign buyer whole year around, regardless the seasonality of the single produce. Mango will lead the line of products as the champion produce.

5.2.5. Export activities organization

Several options can be taken into consideration, depends on the market specific characteristics and business size:

- Establishment of a representative office. It can be expensive but will ensure close interaction with buyers/distributors.
- Visiting the country to meet buyers.
- Engage one import agent in the export market.
- Decide not to export but ask a third trading company to export for you.
- To organize seller-buyer virtual meetings, by involving the export promotion agencies in Vietnam, the local Vietnamese consulate and modern retail companies.

5.2.6. Selling Tips

South Korea

- Interesting market with stable growth trend. 17,000tons imported in 2020 and 20,000 forecast for 2021. Main suppliers Thailand, Peru, Vietnam, Taiwan, Philippines, Brazil. Newcomers: Cambodia (JV with Hyundai) and India.
- Appearance and flavour are extremely important. Mangoes are considered premium quality fruit, sold in high-end stores. Preference goes to high ratio of redness. Large fruit (more than 400grs) are preferred. Mango should be sweet, juicy, have a yellow-orange colour and smooth texture¹⁷.
- Information about health benefit and high nutrient value is an important factor.
- South Korean are not driven by price.¹⁸ But beautiful packaging is essential
- Long distribution chain: importer/trading company

Japan

- Small market. 7,000tons/year. But remunerative. Niche market. Dominated by Mexico, Thailand (all year round), Taiwan and Peru.
- Appearance very important, no skin damages. Sweet taste is good, sour is not. Mangoes should weight 300-400grs, and it's essential for use as gift. Consumers associate tropical fruit consumption with social and cultural customs. Not price sensitive buyers. Very concerned about food safety and fruit nutritional content.
- Long distribution chain: importer/trading company, wholesaler, retailer. Market segment: supermarkets, convenience stores, specialized shops/fruit gift shops, Co-ops, e-commerce/internet retailing.
- Indicative CIF Price \$/kg (2018): Australia 13.34, Taiwan 12.97, Brazil 7.68, Thailand 7.34, Philippines 6.48, Peru 5.38, Mexico 4.97¹⁹
- Japanese mangoes 50-90\$/kg.

¹⁷ FreshPlaza 2019

¹⁸ Euromonitor 2019

¹⁹ CRCNA-Japan Market Report 2019

Australia

- Very small market. 1,000 tons per year.
- Off Season market April to August. Off season is not so price sensitive (*mangoes still maintain exotic appeal and not a commodity such as apples and oranges.*). Market is variety sensitive: “Florida” type varieties such as Tommy Atkins, Keitt, Kent etc, are viewed as a negative and will sell at a discount compared to yellow skin varieties.
- Skin colour is important. Yellow (preferably with blush). Green skin instead is viewed as a negative. Mango must meet minimum dry matter content 15%, brix minimum 16 preferred 18+
- Market segments: supermarkets tiers 1 and 2 account for 80%. Small independent retailers 15%, Others, such as Farmers markets, fundraisers and providers only 5%.
- Tier 1 supermarkets have high entry requirements in compliance; they are not particularly price sensitive and are able to move very large volumes.
- Fruit is sold by per piece, mid-season it will be \$1.89 to \$2.5 per piece retail, on the shoulders it will be \$4 to \$7 per piece, even higher in specialty shops.

5.3. Conclusions

Considering the advice outlined above and with the guidance of common sense, there are some questions that the exporter must ask himself when deciding to venture into export.

Looking at the buyer not as the final point of arrival of his products, but as a partner with a common goal, that is, to sell the products supplied by the exporter to the final consumer, he should ask oneself:

1. What is unique about my product that my competitors' products do not have?
2. Do I have a story of passion, quality, tradition to tell him and to the final consumer?
3. Am I able to keep the contractual promises I have signed, in terms of quality and quantity?
4. Can I be flexible with my prices and accommodate market trends?
5. Did I understand and respect the culture, eating habits and preferences of the final consumers?

6. Annex 2: Guidelines for the video to promote mango

The short video should include at least of the following parts:

1. an initial aerial shot of one or more plantations, finding a way to create a link with Vietnam (for example peasants on bicycles with the traditional conical hat) and then bring the viewer's imagination to that specific country.
2. Interview with a farmer (possibly along with his family) who will tell how much work he does and how much passion he puts into it to prepare the land and the trees. The care he takes to protect the plant from disease and the fruit from parasites, how much attention he uses to

harvest ripe mangoes. The attention he pays to protect his family and the environment from pollution/contamination. This is a crucial part of the movie. Therefore, should also include some shot where the farmer's family members work around the plant, protect the fruit with paper bags, pick the fruit with extreme care and deposit it in the crates.

3. A brief shot of the travel from the plantation to the pack-house (with an adequate means of transportation).
4. In the pack-house the person in charge will explain the reception, washing and selection of the mangoes and their packaging to the pack-house.
5. A shot will be dedicated to the treatment (VHT or irradiation) to complete the complying process with the regulations of the country of destination.
6. Departure of the cartons containing the mangoes from an airport and from a seaport.
7. Finally, a vision of the interior of a modern supermarket, with the Vietnamese mangoes displayed on the shelves and a group of consumers who choose them.

This video will be part of the communication to the final consumer in different markets, so the narrator will also need to be dubbed (or the subtitles will be added) in Japanese or Korean or English.

The duration of the video should not exceed 3 minutes. However, it will be useful to cut the movie to have a duration of e minute for in store projection.

The movie will convey a positive, reassuring message to the final consumer, capable of creating a good reputation for the actors in the value chain and stimulating the trust of the final consumer.

7. Annex 3: Initial recommendations for the development of a mango national branding strategy

In general **branding** is the process carried out by companies (but also by a group of companies like an **export consortium**, or by an **association of companies**, or by a legal entity) to differentiate their offer from other similar ones, using distinctive names or symbols. Its main purpose is to promote the **brand image** and encourage customer loyalty to the brand. Also, it helps people quickly identify a brand and give them a reason to choose specific products over those of the competition. In very simple terms, a brand is the perceived **image** of the product that a company sells, and branding is the strategy for creating that image. A branding campaign is successful when consumers are convinced that there are significant differences between competing brands.

There is an urgent need to fill the gap of branding for the Vietnamese mango. A sort of blanket branding, carried out at institutional level to start building the image and the reputation of the mangoes produced in and exported by Vietnam. This branding process will benefit the mango industry as a whole, not the individual private sector exporter.

It goes without saying that once the image/reputation of the national mango has been built, individual exporters can ask the Institution (which owns the national mango brand) to be allowed to use that brand along with his company name. On condition that their mangoes comply with some technical requirements and quality standards. This to avoid that non-compliant mango can spoil the image/reputation built at the national level.

An example from the Italian dairy sector may help clarify the above concept: the internationally well-known Italian cheese “Parmigiano-Reggiano ®” is produced by 363 companies, all belonging to the Consortium of the Parmigiano-Reggiano.²⁰ The consortium carries out all branding activities to promote and support the collective brand.

Each cheese producer, member of the consortium, is committed to follow a very strict production process, which authorizes the individual producer to use the blanket logo of the Consortium along with its own brand. In this case the name/brand of the cheese producer is Zanetti.



Similarly, the consortium or association designated to promote the Vietnamese mango brand could grant the use of the national brand to those exporters who meet certain quality parameters. Once the link between the national brand of mango and the perception of quality has been consolidated in the final consumers, each exporter will benefit from using the national brand along with its own name / brand.

²⁰ (<https://www.parmigianoreggiano.com/>).



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