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GLOBAL QUALITY
AND STANDARDS PROGRAMME

GLOBAL MANGO MARKET SITUATION

Global Quality & Standard Programme - Vietnam

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DISCLAIMER

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1. A necessary premise about global data

The international Harmonized Commodity Description and Coding Systems (HS) relating to the production and marketing (HS) of mango aggregates in the same cluster three fruits: mango, guava and mangosteen. Conventionally, mango is attributed a weight of 75%, 15% to guava and the remaining 10% to mangosteen.

In some countries this conventional subdivision does not reflect the reality: it is the case of Thailand where the production of mangosteen is very important. The export figures from Thailand to China, for example, refer to 90% of mangosteen and not to mango or guava.

So, the conventional division in some cases could be misleading. The same happens to the trade data. Furthermore, besides the fresh fruits the aggregate data also include the dried fruits. Therefore, for the latter the only possible source is the industry.

FAO is the global source for the production data. However, the collection of the data is a long process (as of today the available data are those of 2019) and complex, as countries adopt different methodologies for the collection of their own production data.

UN Comtrade is the global source for the trade data. The UN Agency has to rely on the import-export data (and on sending time) provided by the country members.

Here too, the collection and classification systems adopted by the various countries for import-export flows may be different, and the data do not coincide. Just checking the mirror data: the mango volumes recorded by country A as exported to country B rarely match the volumes of mango imported from country A recorded by country B!

It is even more difficult to make the values of exports coincide with those of imports, where little controllable factors such as Incoterms (FOB and CANDF), local currency exchange rates, customs value assessment intervene.

Having said that, anyway FAO and UN Comtrade data are used by all analysts to read the import-export flows and evaluate the trends in the production countries and in foreign markets.

2. COVID-19[1]

Almost 2 years after the start of the pandemic, it is clear that the disease and containment measures implemented by governments have impacted production, harvesting, transportation and distribution of all tropical fruit, including mangoes.

Social distancing had the greatest impact on all labour-intensive activities. Given their natural perishable nature, mangoes require to be harvested, processed and transported on time.

[1] Source: OECD-FAO: Agricultural Outlook 2021-2020, OECD-FAO 2021

In the past months there have been delays in customs operations in ports and borders, lack of space on planes, shortage of refrigerated containers and a dramatic increase in air and sea freight rates. Furthermore, the closure of schools, canteens, restaurants and hotels has reduced the demand for tropical fruit in general. On the one hand the decline of economies globally, the loss of jobs, the decline in the income of large groups of consumers have further impacted the demand for high-value products.

On the other hand, consumers' demand for vitamin-rich food has partially offset the decrease in demand for tropical fruit. This was particularly noticeable in the two main import markets USA and EU.

There are reports of unsold tropical fruit that went to waste. Therefore, the volumes of imports in these markets do not correspond to the sales to consumers (with the usual percentages of rejection). In other words, the real market in 2020 in USA and EU is not easily quantifiable.

Despite these negativities, the projections for the near future have turned positive: the demand for tropical fruit and therefore also for mangoes in high-income countries should start to grow again. So is the demand in emerging markets such as China and India.

3. Global production[2]

2019 production confirmed the positive trend shown in previous years. The mango production went from 53,405,667 tons to 55,853,238 tons, with an increase of 4.58%. The main producing countries recorded growth: India +2.66%, Indonesia +6.85%, China +0.83%, Thailand +3.28%, Mexico +9.99%, Brazil +5.23%, Egypt +3.09%, Bangladesh +3.48%, Vietnam +9.71%, Philippines +3.98%, Peru +41.28%. Only Pakistan recorded a negative trend -2.15%.

From some articles published by international specialised media (FreshPlaza, Tridge, Asia Fruit, Produce Report) it seems that despite COVID-19 the global production maintained a growth pace even in 2020. This trend is line with the forecast outlined by FAO, which projected the global production of mango to reach 65 million tonnes by 2028, increasing at an annual rate of 2.1 percent over the next decade[3].

4. Global trade[4]

Global exports in 2020 recorded a slight decline compared to 2019, falling from 2,557,888 tons to 2,538,938 tons equal to -0.74%.

[2] Source: FAO-Stat
[3] Source: FAO – Medium-Term Outlook, 2020 Rome
[4] Source: ITC-Trade Map

While global imports increased from 2,275,780 tons in 2019 to 2,390,765 tons in 2020, equal to +5.5%.

It's interesting to see how the main actors moved during the difficult time last year:

Table 1: Mango export in 2020 - Global volume and main exporters - Quantity in tons

	2019	2020	Delta	%	Main destinations
World	2,557,888	2,538,938	18,950	0.74	
Mexico	412,873	421,636	8,763	2.12	USA, Canada, Japan
Thailand*	479,616	391,280	88,336	18.42	China, Vietnam, Malaysia, Laos
Brazil	222,126	243,466	21,340	9.61	Netherlands, USA, Spain, UK
Peru	191,417	239,391	47,974	25.06	Netherlands, USA, UK, Spain, Canada, Russia
Netherlands (re-export)	192,740	212,217	19,477	10.11	Germany, France, UK, Belgium, Switzerland, Norway, Poland, Italy, Austria
India	147,242	128,026	19,216	13.05	Saudi Arabia, UAE, Yemen, Netherlands, Kuwait, Oman, UK
Pakistan	97,091	107,196	10,105	10.41	UAE, UK, Oman, Afghanistan, Saudi Arabia, Qatar
Vietnam	158,688	97,567	61,121	38.52	China, UAE, Russia, Korea, USA
Hong Kong (re-export)	33,727	88,573	54,846	162.6	China
Ecuador	53,117	60,135	7,018	13.21	USA, Colombia, Canada, Netherlands
Spain (re-export)	47,207	59,491	12,284	26.02	Portugal, France, Germany, Morocco
Indonesia	28,956	57,825	28,869	99.70	HK, China, Malaysia, Singapore, UAE
Egypt	51,547	23,921	27,626	53.59	Saudi Arabia, UAE, Jordan, Russia, Kuwait, Oman
Kenya	14,048	24,132	10,084	71.78	Uganda, UAE, Oman, Saudi Arabia
Philippines	18,827	16,801	2,026	10.76	HK, USA, Korea, Japan, Canada

Note:

*The world aggregation represents the sum of reporting and non-reporting countries

*Data based on the partner reported data (Mirror data) are shown in orange

*The quantities shown in dark green are estimated by ITC

*Mainly mangosteens

Mexico, Thailand (but only for mangosteen), Brazil, Peru and Netherlands (but mainly re-export to EU) confirmed their dynamism.

Table 2: Mango import in 2020 - Global volume and main importers - Quantity in tons

	2019	2020	Delta	%	Main origin
World	2,275,780	2,390,765	114,985	5.05	
USA	518,228	573,751	55,523	10.71	Mexico, Peru, Ecuador, Brazil, Haiti Guatemala, Dominican Republic, Thailand (dried mango) Philippines, Nicaragua, Costa Rica, Vietnam (787 tons)
China	379,792	378,778	1,014	0.27	Thailand (mainly mangosteen) Vietnam (67,233 tons), Indonesia Taiwan, Malaysia, Peru, Australia, Philippines
Netherlands (re-export)	208,975	230,221	21,246	10.17	Brazil, Peru, Ivory Coast, Dominica Republic, France, USA, Mali
Germany	91,558	101,261	9,703	10.60	Brazil, Peru, Mexico, Spain, Ivory Coast, USA, Burkina Faso, Senegal, Mali
Hong Kong (re-export)	50,623	100,801	50,178	99.12	Thailand, Indonesia, Philippines, Taiwan, Malaysia, Australia, Vietnam (1,066 tons)
Saudi Arabia	54,723	79,584	24,861	45.43	Egypt, Yemen, Pakistan, India, Kenya, South Africa, Peru, Sudan Vietnam (257tons)
Canada	71,202	77,418	6,216	8.73	Mexico, Peru, Brazil, Taiwan, Ecuador, Dominican Republic, Colombia, Thailand, USA, Pakistan, Haiti, Jamaica, Vietnam (242 tons)
UK	79,579	72,921	6,658	8.37	Brazil, Peru, Germany, Pakistan, Dominican Republic, Netherlands, India, Ivory Coast, France, Israel
Spain (for re-export)	60,590	70,302	9,712	16.03	Brazil, Peru, Portugal, Netherlands, Mexico, Senegal, Ivory Coast, Dominican Republic, France
UAE	89,852	70,142	19,710	21.94	Pakistan, India, Egypt, Vietnam (5,331 tons), Kenya, Yemen, South Africa, Thailand, Sri Lanka, Australia Brazil, Indonesia, Peru
Malaysia	44,684	63,054	18,370	41.11	Thailand, Indonesia, China
France	70,227	60,688	9,539	13.58	Peru, Spain, Brazil, Ivory Coast, Israel, Senegal, Mexico, Dominican Republic, Netherlands
Russia	31,119	38,695	7,576	24.35	Peru, Brazil, China, Egypt, Vietnam (3,020 tons), Israel, South Africa, Thailand, Dominican Republic, Ecuador

Note:

*The world aggregation represents the sum of reporting and non-reporting countries
*Data based on the partner reported data (Mirror data) are shown in orange
*The quantities shown in dark green are estimated by ITC

5. USA

With **573,751** tons imported in 2020 the USA market is once again confirmed as the most important global importer. Local mango production is very limited (around 1,000 tons per year and in Florida only), so the country is completely dependent on imports.

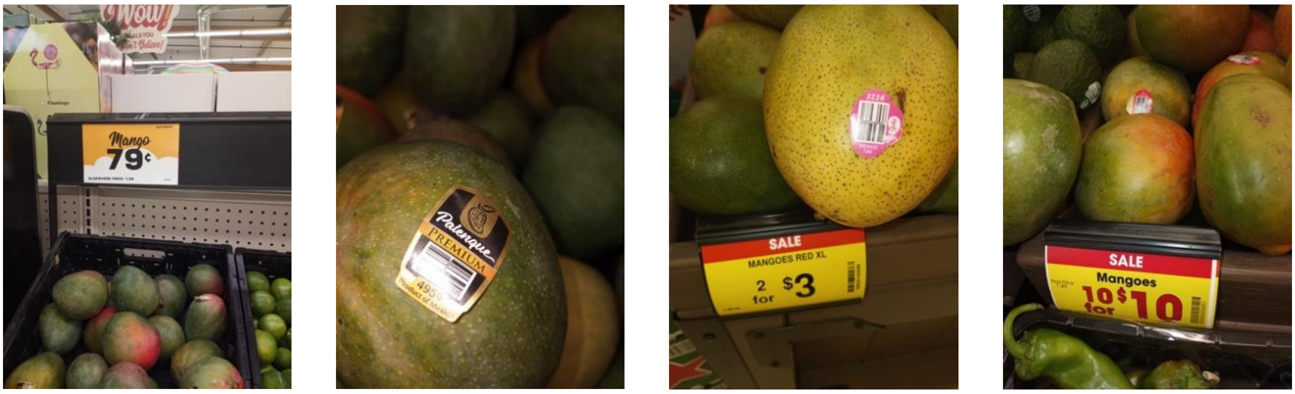
The main supplier has been Mexico for several years, which exploits the logistical advantage, large areas destined for the cultivation of the fruit, a low labour cost and a product quality that satisfies the less sophisticated American consumer (ie the majority).

A truck of Mexican mangoes reaches distribution points across the southern belt of the country within a few days. Furthermore, several supermarket chains are owned by Mexican companies, which further boosts the control of the market share. The other suppliers are almost all located in Central America and Latin America, except for a couple of Asian producers Thailand and Philippine (which mainly supply dried mangoes) the other producers (India, Pakistan and more recently Vietnam) are relegated to the specific market of the ethnic communities, where the high selling price to the consumers it is not a very important element. From an analysis of the imports recorded by the American customs, an average arrival price at the border or port / airport is around 1 $ / kg.

Table 3: USA - Mango main suppliers in 2020

	Value/$	Quantity/Kg	$/kg	Note
Mexico	391,110,912	359,537,813	1.09	
Peru	98,905,154	74,573,234	1.33	
Ecuador	62,775,362	53,965,621	1.16	
Brazil	62,472,425	48,214,065	1.30	
Philippines	35,320,220	3,227,950	10.94	Dried mango
Thailand	20,759,414	3,310,702	6.27	Dried mango
Haiti	17,687,776	11,644,798	1.52	
Guatemala	11,177,974	11,007,675	1.02	
Dominican Rep.	4,463,573	3,567,249	1.25	
Vietnam	3,219,913	787,136	4.09	
Nicaragua	1,839,575	2,162,033	0.85	
Burkina Faso	1,670,080	197,806	8.44	Dried mango
Costa Rica	1,527,715	1,522,792	1.00	
Taiwan	n.a.	n.a.	n.a.	
China	1,124,358	51,222	21.95	Dried mango
Australia	1,072,649	117,015	9.17	Fresh mango
Pakistan	431,371	226,857	1.90	
India	231,493	68,245	3.39	

Figure 1: Mexican mangoes taken in some supermarkets in South California



The above are photos of Mexican mangoes taken in some supermarkets in South California (August 2021). Depending on quality, appearance and size retail selling prices go from 0.79c to 1.5$ per one fruit.

As regards the varieties, Ataulfo (honey mango), Madame Francis, Keitt, Kent and Tommy Atkins continue to be the main varieties[5].

Interestingly, to differentiate the offer and attract the consumers preference some giant supermarkets like Costco have stressed their interest in organic mangos. More and more Mexican growers are adding an organic area to their orchard[6].

In this scenario, the Vietnamese mango is not very competitive to be taken into consideration by the buyers of the large supermarket chains. On the other hand, the Vietnamese community of more than 2.2 million people can represent an interesting outlet. Dried mangoes and other forms of processed mangoes, on the other hand, may be more likely to succeed.

6. European Union

The European Union imported **379,689** tons of mangoes in 2020, and it has a weight in the global mango market equal to that of China (378,779 tons imported in 2020).
However, the sum of the import of each individual country in Europe is higher because of the re-export. Therefore, for a better quantification of the European market, it is advisable to compare the imports and exports that some European countries make annually. The volume that emerges provides an indication of the European consumption of fresh or dried mangoes (and mangosteen and guava).

Table 4: European Member States - Mango Trade Balance – 2020

Unit: Tons

Countries	Import	Export	Local consumption	Local Production (Estimate)
Netherlands	278,319	243,366	34,953	

[5] Source: Mr. Vlad Mitton, member of the National Mango Board, to FreshPlaza.
[6] Source: Organic Produce Network-OPN CONNECT NEWSLETTER 52

Germany	101,261	9,499	91,762	
UK	72,921	3,268	69,653	
Spain	70,302	59,491	10,811	30,000
France	60,688	8,547	52,141	
Portugal	37,910	15,196	22,714	5,000
Belgium	20,048	7,040	13,008	
Switzerland	16,695	43	16,652	
Sweden	13,788	766	13,022	
Poland	12,164	1,680	10,484	
Italy	12,056	1,656	10,400	2,000
Romania	7,068	-	7,068	
Finlandia	4,869	95	4,774	
Denmark	4,762	378	4,384	
Austria	2,965	401	2,564	
Greece	2,916	210	2,706	
Ireland	1,503	12	1,491	
Total	720,235	351,648	**368,587**	**37,000**

Source: ITC-Trade Map

For a more effective market understanding it would be advisable to consider Europe as an organized aggregation of markets, with a different history, language, culture and food preferences. Consumers in some countries have more familiarity with tropical fruit. In some others (mainly those in the Mediterranean belt) the consumers prefer local production, which goes in direct competition with the imported tropical fruit. Furthermore, some European countries have long hosted large communities coming from different mango producing countries, including Vietnam. These communities have a deep familiarity with mangoes and thus prefer to consume the specific varieties coming from their own country of origin, even though they are more expensive than other origins.

The main European importers in 2020 were[7]:

Netherlands: **230,221** tons (+10.17%)[8] mainly imported from Brazil, Peru, Ivory Coast, Dominican Republic, France, USA, Mali, Portugal, Germany, Senegal Spain.
This country is the main hub for the import of fresh mangoes. The Dutch consume locally about 10-15% of the total and re-export the remaining to European countries and UK.

Germany: **101,261** tons (+10.6%) mainly imported from Brazil, Peru, Mexico, Spain, Ivory Coast, USA, Dominican Republic, Burkina Faso, Senegal, Mali, Israel.
Germany is the largest consumption market for mangoes in Europe. In 2020 Germany had an estimated mango domestic consumption of 90,000 tonnes (imports minus exports). German consumers are still considering mangoes as an exotic fruit, with increasing

[7] Source: ITC-Trade Map
[8] Imported mango percentage compared to previous year

popularity. As more and more consumers are becoming familiar with mangoes, demand can continue its growth over the next years.

United Kingdom: **72,921** tons (-8.37%, Brexit and the low value of the British pound may have caused the import decrease) mainly imported from Brazil, Peru, Germany, Pakistan, Dominican Republic, Netherlands, India, Ivory Coast, France, Ghana, Israel, Egypt.
UK is an important market for mangoes, but also very selective. Export opportunities can be found in mango diversification and ethnic markets. Right after Germany, the United Kingdom is the second-largest consumer of mangoes in Europe. Besides the traditional fresh whole fruit, new products such as freshly cut mangoes, frozen mango lollies and ice cream, have entered the market, increasingly attracting the interest of consumers. Another important characteristic of the UK market is the ethnic mango segment: The United Kingdom is an important market for specific air freighted mango varieties from Pakistan (Chaunsa and Sindhri), and from India (Alphonso and Kesar). It's unlikely to find Pakistani or Indian mangoes in the modern supermarkets.

France: **60,688** tons (-13.58%) imported mainly from Peru, Spain, Brazil, Ivory Coast, Israel, <Senegal, Mexico, Dominican Republic, Netherlands, Burkina Faso.
France is an interesting market for West African suppliers. Mango is a popular fruit in France, and it positioned itself as the third-largest consumer market in Europe. Because of its historic connection, West Africa has quite a high export volume of mangoes to France. French consumers are also familiar with Amelie mango variety from Burkina Faso.

Spain: **70,302** tons (+16.03) mainly imported from Brazil, Peru, Portugal, Netherlands, Mexico, Senegal, Ivory Coast, Dominica Republic.
Spain is an interesting and complex market. It's one of the fastest-growing importers of mangoes. At the same time, it is one of the fastest-growing markets in Europe. With both local production (that Freshplaza overview of the global mango market estimated as 30-35,000tons in 2020) and aggressive exports, Spain aspires to become a second potential trade hub for mangoes. Osteen, which is the main mango variety, has driven the Spanish consumption upward.

Portugal: **37,910** tons (+11%), imported mainly from Spain, Netherlands, Brazil, Germany, UK, Luxembourg. Portugal is a mature market with a strong preference for mango consumption (Its population is only 10 million inhabitants) therefore there could be a window of trade opportunities between the Spanish and Brazilian seasons.

The EU has set very strict technical requirements (in particular MRL) but also rigorous quality standards. In addition, some member countries have tightened the requirements and standards. It is a more profitable market than the USA, but the product entering the European market must be compliant.

7. China

With its **378,778** tons imported in 2020 (a little bit less than the 2019 imports) China is positioned as the third import market in the world. The main suppliers are Thailand (but here we must specify that almost all is represented by mangosteen and not mango or guava), Vietnam, Indonesia, Taiwan, Malaysia, Peru, Australia. The Chinese market is constantly evolving, both in terms of consumption volumes and orientations of Chinese consumers. Although China produces more than 2.5 million tons on the island of Hainan (680,000 tons) and in the provinces of Guangxi (800,000 tons),[9] Yunnan, Guandong, Sichuan and Fujian, it cannot meet the ever-growing demand. Therefore, imports will tend to increase in the coming years.

Some producers have recently entered the Chinese market in a more organized way:

> Myanmar, which produces 700,00 tons and it is estimated to export 25-30,000 tons to China[10], enjoys the same preferential treatment as Vietnam.
>
> Cambodia, which in the past had exported mainly to Vietnam (which then re-exported to China, without much attention to the origin declaration), got the registration of 37 farms and 5 pack-houses. **Cambodia produces more than 1.44 million tons, and the government expects to reach 500,000 tons in a few years.**[11]
>
> Pakistan, that exported about 20,000 tons to china this year, against the 3,600 in 2020 has recently signed agreements with Chinese companies to sell its mangoes also in the e-commerce channel.

It is worth mentioning that those countries have already strong economic links with China and these agreements have been materialized in the context of such relationships. It is foreseeable that they will become strong competitors of Vietnamese exporters.

Furthermore, it is noted that Peru has a very aggressive entry market policy for the Chinese market. The private companies have invested in high technology to extend the shelf-life of the mangoes in order to sea ship them, as the air-freight rate are very expensive.

Interestingly China started in 2020 recording the import from Vietnam (which take place through the cross border) while in the past it had ignored the significant quantities exported by its neighbours: 2016/0 tons, 2017/226 tons, 2018/2,069 tons, 2019/141 tons, 2020/67,223 tons. The export of mangoes from Vietnam to China has been documented by the Vietnamese customs authorities in the past years.

The largest percentage of the Vietnamese mangoes is sold to the traditional outlets and wet market. The second main destination is the processing industry. Only a small portion reaches the

[9] Source: FreshPlaza
[10] Source: The Global Light of Myanmar and author's elaboration.
[11] Source: FreshPlaza

medium level supermarkets[12]. Worse, the origin of Vietnamese mangoes on sale on the shelves in a low-medium supermarket is not always indicated, which brings to the conclusion that despite the large volumes of produce constantly supplied to Chinese buyers the brand/image of the Vietnamese produce has a long way to go.

8. UAE

The Emirates Imported about **69,000** tons in 2020[13] (-23.3%), mainly from Pakistan (39,000 tons), India (15,000 tons), Egypt (3,700 tons), Vietnam (3,610 tons, -32.3%), Kenya (3,270 tons) S. Africa (2,100 tons).

The distribution of tropical fruit in the UAE is highly polarized: a large segment is characterized by wet-markets, small-medium sized supermarkets where price is the main driver and is aimed at expatriates with a medium-low income; and an important segment represented by the well-developed modern retail infrastructure, where in addition to price, quality (organic produce and superfood) plays an important role. This segment caters to upper-middle income expat, who are increasingly interested in healthy eating (organic produce and superfoods) regardless of price.

Asian and African suppliers dominate the competitive lower price produce segment. By combining the diversity in demand with a structured supply chain the market still presents opportunities for suppliers of high-quality produce. Vietnam exporters should rethink their strategic approach to this market, by increasing their focus on the high market and differentiate Vietnamese origin from Pakistani and Indian varieties.

9. South Korea

South Korea imported **17,417tons** (-7.5%) in 2020, mainly from Thailand, Peru, Philippines, Vietnam (1,114 tons) Taiwan, Brazil and Australia.

Similarly, to the Japanese, the Korean consumers' preference is driven by appearance (including packaging), skin colour, absence of defects (otherwise considered of low quality), flavour and sweet juicy flesh.

The successful Thai and Peruvian export models are based on proper and constant/consistent delivery time, class I and extra quality and impeccable presentation.

Despite the long distance, Peru has performed exceptionally in this market. The main variety exported is Kent. The Peruvian mangoes are appreciated by Korean consumers because they **have a good red blush**, good sizes, good packaging presentations and are sent in perfect time so that the fruit doesn't arrive soft.

[12] Source: AGB/2016/007 in-depth interviews with 26 stakeholders in the supply chain of imported mangoes in Shanghai
[13] Author's estimate based on mirror data, as UN Comtrade and ITC haven't published the 2020 data yet.

Despite the limited quantities exported to S. Korea from Cambodia in 2020, this producer has a good chance of having a prominent role in the market. The JV between Hyundai Corp (which invested in VHT plant) and Cambodian Mao Legacy (400ha) established in 2019, may have some competitive advantages (eg competitive ex-orchard prices, strict technical and quality control, south Korean deep market knowledge) versus the conventional exporter-importer business relationships.

Vietnamese exporters have made a lot of progress in the period 2016-2020 going from 394 tons in 2016 to 1,114 tons in 2020. It is not specified whether the sales take place in modern distribution or are addressed to the large Vietnamese community living in Korea.
To support the efforts of exporters aimed at expanding the current market share, it would be advisable to study a specific promotional campaign to be carried out in the main Seoul supermarkets.

10. Japan

Japan is a small import market: **6,903** tons (-8.3%) in 2020. Mainly imported from Mexico, Thailand, Peru, Taiwan, Vietnam (211 tons).

Despite its small size, limited per capita consumption and limited growth in recent years, the Japanese market represents an interesting niche because local consumers' preferences are mirrored with the Korean consumers' preferences: the appearance is extremely important for Japanese consumers. Fruit has to be carefully packed. No scratches, blemishes or black marks on the skin. Otherwise, it is considered low quality level-price.

Therefore, the efforts to produce a mango that meets the needs of Korean consumers, could be capitalized in larger exports to the Japanese market.

11. Australia

Australia is a producer of good quality mangoes. It had a bumper crop of 72,220 tons in 2020[14] (+31.3%). The country imports less than **1,000** tons, mainly from Thailand, Vietnam (238 tons) Brazil and Mexico, during the off-season (march-august). The country exports between 7 and 8,000 tons depends on the years.

Australia could become a stable market for Vietnamese exporters able to ensure a product that complies with the country's stringent requirements, initially focusing on small quality tropical fruit supermarkets during the off-season window, creating a reputation for quality compared to other producers. and once its positioning has been consolidated, move on to large-scale distribution. Here, too, the support of a promotional campaign would support the efforts of exporters.

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[14] Source: Orchard Tech, 11-6-2021

12. Final considerations for the mango export from Vietnam

Reading the statistics of the export of Vietnamese mangoes we note that over the last 7-8 years the country has progressively increased the volumes, except in 2020. All the production efforts, however, have been concentrated on only the Chinese market, favoured by logistical proximity and by a non-rigid level of SPS, Mrl and quality controls.

On the one hand, this has boosted the development of an important “export machine” involving farmers, transporters, pack-houses, exporters who are now able to satisfy the requests of Chinese importers almost all year round. But on the other hand, it has objectively slowed down the production improvement process in terms of best practices able to comply with the requirements of other more remunerative markets where instead buyers and above all distributors and final consumers pay close attention to the levels of chemical products contained in the fruit they buy, to absence of insect infestations as well as appearance, aroma, texture and certainly the price.

The remaining 5% of exports went to the Russia, UAE (Dubai in particular), USA and South Korea. The quantities exported to other markets such as Lithuania, Australia, HK, Japan, Qatar, Canada, Belgium, Ukraine, France, ... remained limited. This unfortunately has left other producing countries with more aggressive export policies to occupy important shares in profitable markets, especially the European market.
It is unthinkable that private exporters will be able to recover the advantage gained by their competitors by using only their financial resources. They will need to be supported in the medium term with a promotional campaign.

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