# Key Fact Sheet for Mango Food Service Strategy

**Food Service has taken share from retail food.** Doubling the share of household food spend to 41% since 2000.

| | 2000 | 2024 |
|---|---|---|
| Food service | 26% | → 41% |
| Retail food | 74% | → 59% |

**A clear growth opportunity** as consumers lock in a lifestyle of eating out.

---

**Household spend growth on eating out has exceeded retail food** in the past two years despite mounting cost of living pressure on households .

**10,600T or $35M of Mangoes** were purchased by food service enterprises in FY23.

**Top kitchens see unique taste** from a high yield fruit that signals the start of summer. This provides for a platform for peer influence to reach other mainstream  food service channels.

---

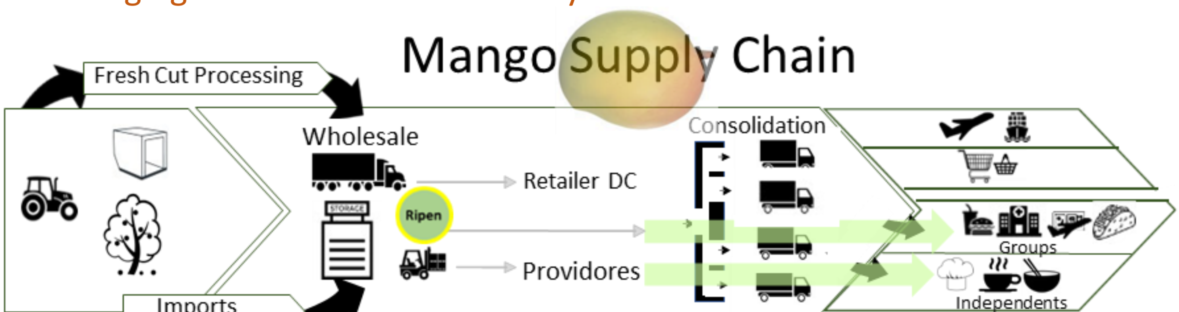
**Cost pressure on food service operators is high** Drawing most into applying a new commercial rigor to be viable. Labour shortages have eased but the sum costs are higher and created a more receptive approach to product in meal ready forms.

**Order aggregators capture 35% of food service income,** by being the recipients of orders for delivered & takeaway meals.

Uber Eats | Menulog | me&u | DOORDASH

---

**Providores handle over 80%** of Mango food service volume and are a significant point of consolidation in the Mango supply chain. The short seasonal window and complexity of the ripening process combine to make consistent supply the standout and most challenging issue for food service buyers.






Hort Innovation

freshlogic

# Key Fact Sheet for Mango Food Service Strategy

## The Food Service channel is complex with 60,000 outlets and 12 sub-channels.

This is best managed by grouping subchannels by their type of offer, which is profiled in the table below.

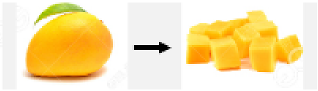
| | Sub Channel | Volume(T) FY23 | Share FY23 |
|---|---|---|---|
| Dining Out & Takeaway | Cafes & Restaurants | 3,647 | 34.5% |
| | Pubs, Clubs & Function Centers | 3,477 | 32.9% |
| | Quick Serve Restaurants | 933 | 8.8% |
| | Independent Takeaway | 424 | 4.0% |
| Travel & Events | Events & catering | 712 | 6.7% |
| | Travel | 445 | 4.2% |
| | Accommodation | 115 | 1.1% |
| Institutional | Health | 357 | 3.4% |
| | Education | 314 | 3.0% |
| | Corporate & Workplace | 114 | 1.1% |
| | Defense | 17 | 0.2% |
| | Correctional | 17 | 0.2% |
| | Total tonnes FY23 | 10,572 | 100% |

## 80% of Mangoes in Food Service in FY23 were sold by the 4 largest sub-channels

which are all servicing the demand from households for eating out and takeaway. .

# Key Fact Sheet for Mango Food Service Strategy

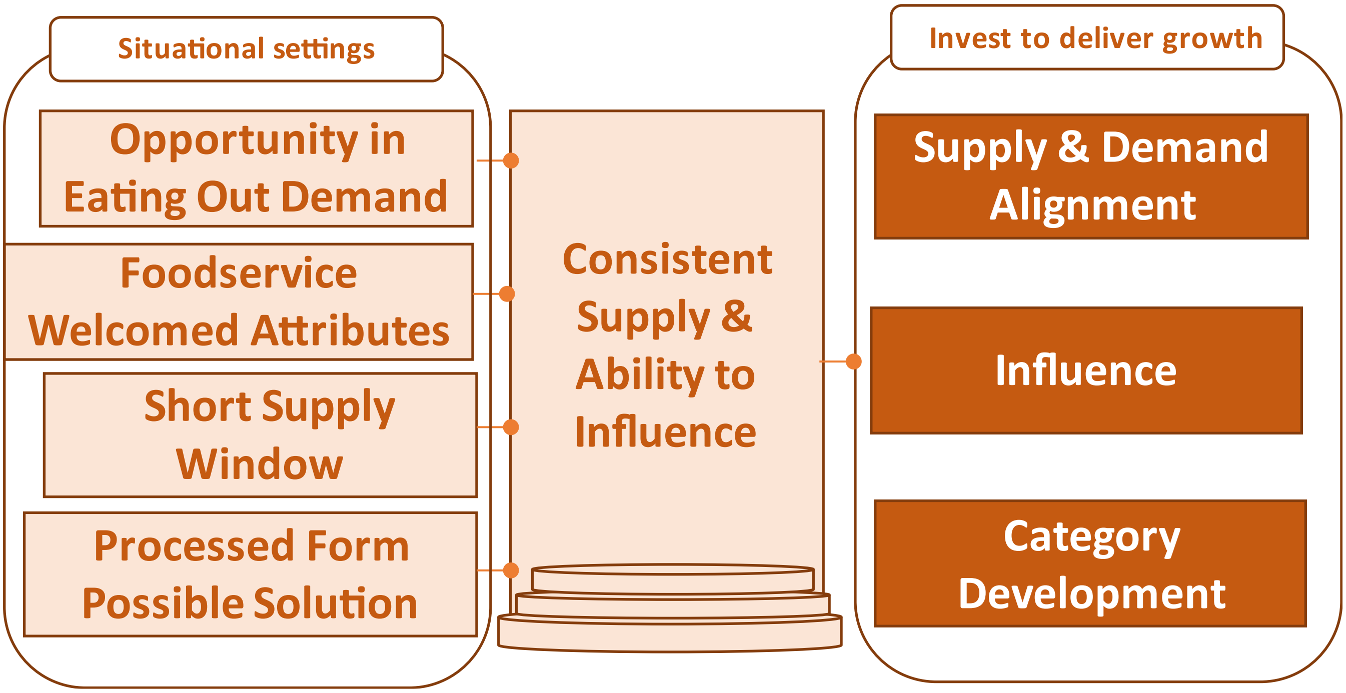
## Mango Food Service growth framed by eating out demand lift, applauded mango attributes but supply confidence challenges.



Increasing household spend on eating out and acknowledged Mango attributes by foodservice buyers, are balanced with a need to stabilise the supply for what is a naturally seasonally varied fruit.

Increasing pressure on Food Service enterprise viability has led to acceptance of all product forms that suit meal assemble operations. In recent years Individually Quick Frozen (IQF) processing has increased and if viable locally has scope to extend the Mangoes' seasonal window and a product form that can be used by all subchannels.

## Mango Food Service Strategy Rationale




**Establish the platform for consistent supply so that other development initiatives to increase volume can succeed.**

Hort Innovation



freshlogic

# Key Fact Sheet for Mango Food Service Strategy

## Goals

- Grow Mango volume into food service channel to 13,211 tonnes in FY27 with a 4-year CAGR of 5.7%.
- Grow volume into sub-channels that are servicing eating out demand, while developing an IQF product form to suit more sub-channels.

## Strategic Priorities

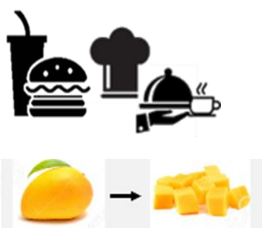
### 1. Supply & Demand Alignment

Invest in programs that seek to align supply into the food service channel, enabling a consistent approach to planning and ordering and buying relationships, improving consistency of supply, and enabling defined seasonal reliability of Mango as an ingredient.

**1.1 Predictable, Reliable Supply**

- Align supply chain
- Gather & use seasonal information to inform buyers on availability

### 2. Category Development



Focus on sub-channels that are servicing "eating out demand from households". Engage in a manner that suits their operational context and solves the seasonal availability challenges of Mangoes.
Explore the viability of producing an IQF form of Mango as a food service ingredient and extend its availability.

**2.1 Viability of IQF processing to extend seasonal windows**

- Define process for IQF viability assessment

### 3. Influence

Inspire food service enterprises to include Mangoes on menus with a program of communications and an aligned suite of operational tools that combine to deliver higher value meals.

**3.1 Capacity to inform and influence.**

- Define target audiences & comms content.
- Digital tool-box
- Resource & process plan