



Horticulture Innovation Australia

Mango Food Service Strategy

Project MG23002



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Strategy & Purpose

- Review, summarise and extract implications from all prior projects and available relevant research on Mangoes in the foodservice channel.
- Improve capabilities of the Mango industry to engage effectively with foodservice providers and execute channel growth plans.

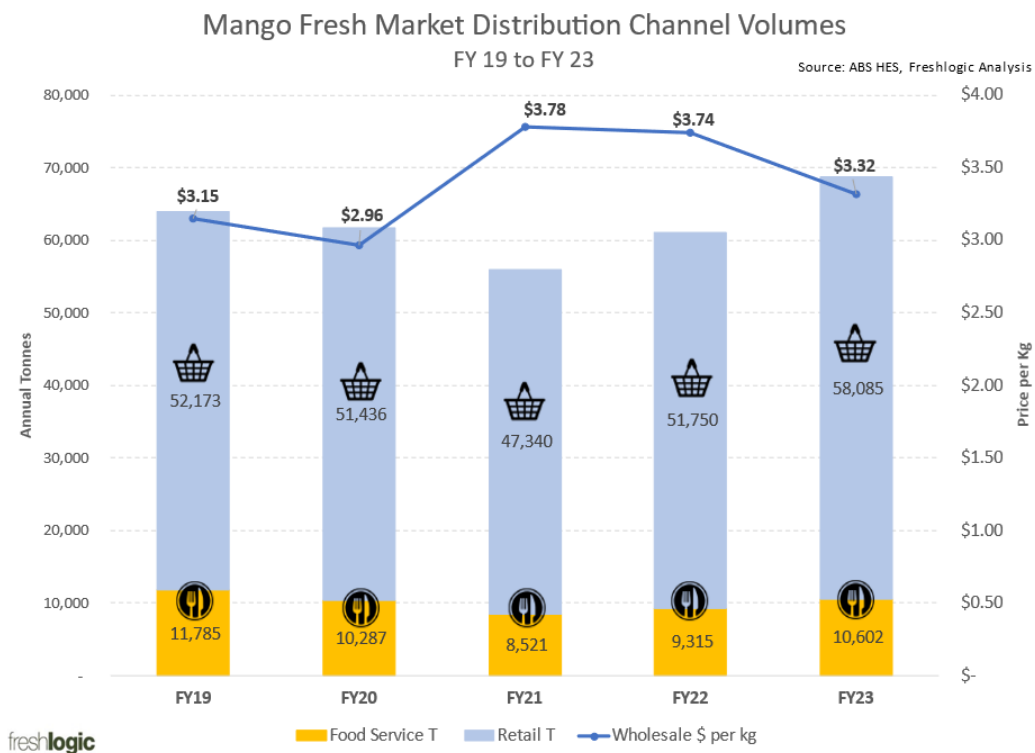
Strategic Development and delivery



Key Findings

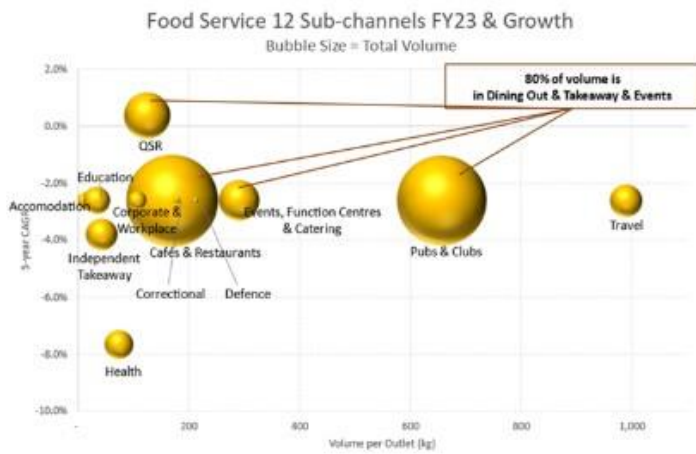
- Mango food service volume is substantial at 15% of total fresh market volume.
- Food Service is capturing more of household food spend than retail food with CAGR FY18 to FY23 for food service 5.6%, while retail food is 2.8%.
- Demand driven by & buyers acknowledge that when they get past the supply chain headaches, mango is a high yield fruit and is a demand driver in a meal.
- Main uses dominated by:
 - Beverages, desserts, salads and to a lesser degree meat dishes.

- Increasing cost pressure across food service enterprises has created a higher receptiveness for meal ready food ingredients that require less labour.
- Limited season length and product inconsistency are barriers for some and challenges for all.
- Firm current demand for 10,000 tonnes of mangoes with the KP taste attribute, that are currently processed into a paste for use in beverages and other food ingredients.



The Diverse Food Service Channel

- Three channel groups and 12 subchannels distributed 10,602t of Mangoes in FY23 valued at \$35.2m.
 - Dining Out & Takeaway - 80% of volume
 - Travel & Events - 12% of volume
 - Institutional - 8% of volume
- The Dining Out & Takeaway group of sub-channels that are servicing the household eating out occasions are the dominant Mango distribution pathway in Food Service.

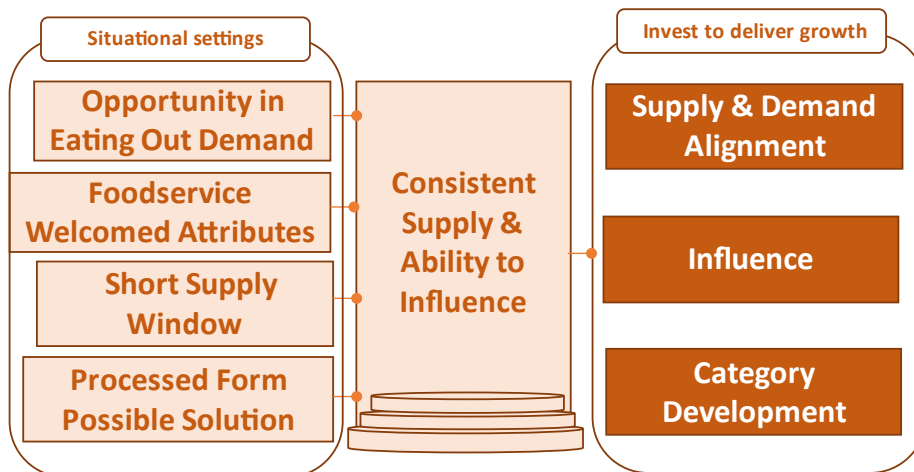


	Food Service Sub Channel	Volume(T)
Dining Out & Takeaway	Independent Takeaway	424
	Quick Serve Restaurants	933
	Cafes & Restaurants	3,647
	Pubs, Clubs & Function Centers	3,477
Travel & Events	Events & catering	712
	Travel	445
	Accommodation	115
Institutional	Health	357
	Defense	17
	Correctional	17
	Corporate & Workplace	114
	Education	314

Strategy Framework

Rationale

Mango Food Service Strategy Rationale



Goals

- Grow the FY23 mango volumes of 10,600 tonnes to 13,111 tonnes into the food service channel in FY27 and in doing so generate a further \$8.33M in wholesale sales from the food service channel.
- Identify and manage the means to reach and influence food service stakeholders.
- Assess if a processed product IQF form that captures the KP taste profile, is a commercially viable product option suitable for food service.

Strategic Priorities & Initiatives

Priorities	Initiatives
1. Improve mango supply to ensure consistent product, over clearly defined seasonal windows.	a) Define and implement an action plan that can inform, influence and align providers to plan and improve supply.



Priorities	Initiatives
	<p>b) Define and implement a means to gather relevant seasonal information and make it available to inform food service buyers & menu planners.</p> <ul style="list-style-type: none"> i. To include alignment with the weekly dispatch data currently gathered by AMIA. ii. Plan for dissemination through the digital toolbox solution scoped in 2 (b).
<p>2. Assess the viability of extending food service menus with a processed IQF product form.</p>	<p>a) Define the decision framework and process to determine if an IQF mango product is viable in Australia. To include.</p> <ul style="list-style-type: none"> i. Assessing the precedents and performance of the IQF product form in the food service channels in US & EU markets. ii. Converse with the Australian ready meal assemblers on demand for this product form. iii. Acknowledge the demand preferences for KP taste attributes and the barriers to lower cost imported IQF alternatives it provides, while also considering scope for other AU mango varieties. iv. Adopt, enhance and employ a decision-criterion that includes: <ul style="list-style-type: none"> I. Level of grower income II. Acceptable product form to food service buyers. III. Forecasted commercial scale IV. Investment barriers to processing capacity.
<p>3. Build the capacity to inform and influence the mango food service supply chain stakeholders.</p>	<p>a) Define the target audiences and communications objectives to inspire, educate and influence decision making.</p> <ul style="list-style-type: none"> I. Prioritizing a communications program to Chefs that can be levered into peer reviews and flow to other sub channels. II. Identifying cross-product and meal occasion promotions to food service that could be complemented by partnering with Mango. III. Including consideration for content on; product grade specifications, seasonal



Priorities	Initiatives
	<p>availability status, handling & storage, menu planning, mango meal assembly procedures and peer reviews of mango meals.</p> <p>b) Define the mechanism to develop and manage an online digital toolbox to deliver Mango content to target audiences.</p> <p>c) Define the processes and resource solution to gather, assemble and update the information required for the communication content.</p>