



Export of Agro Foods

by: Imrane MULBOCUS

Overview of the Manufacturing Sector





Mauritius
"Made with Care"

Domestic Exports
 to the

WORLD



2016

1548
 Product Lines

To
122
 Countries

Top 10 products
60%

Domestic Exports

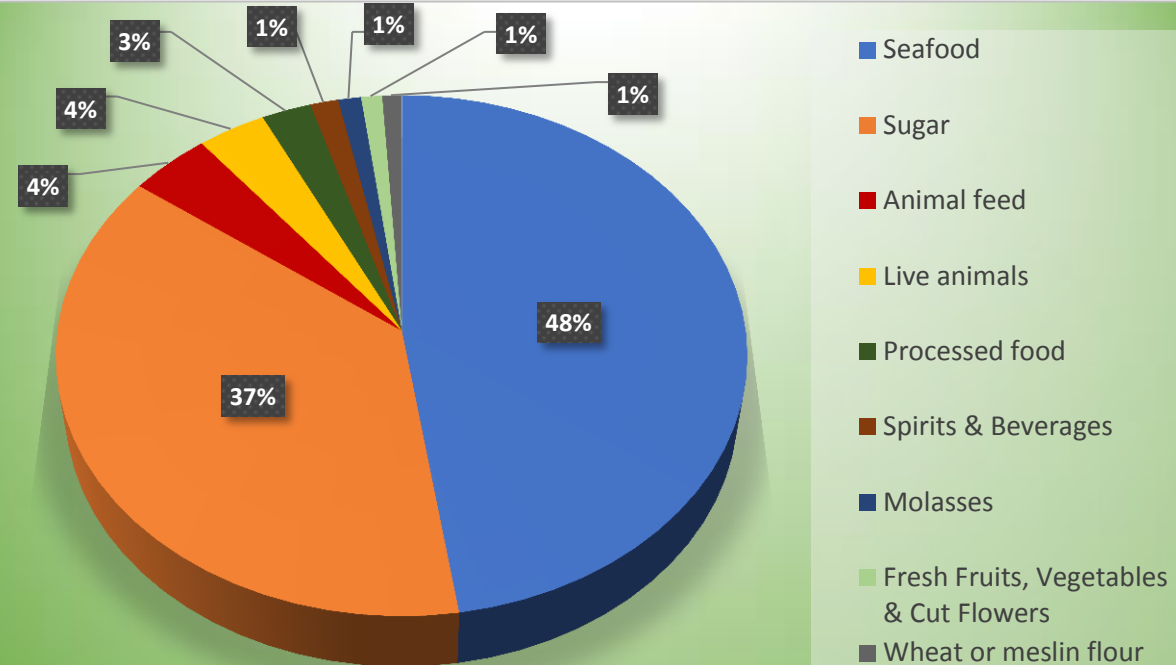
Rs 21 billion

38% Share

16% ↑
2010-16

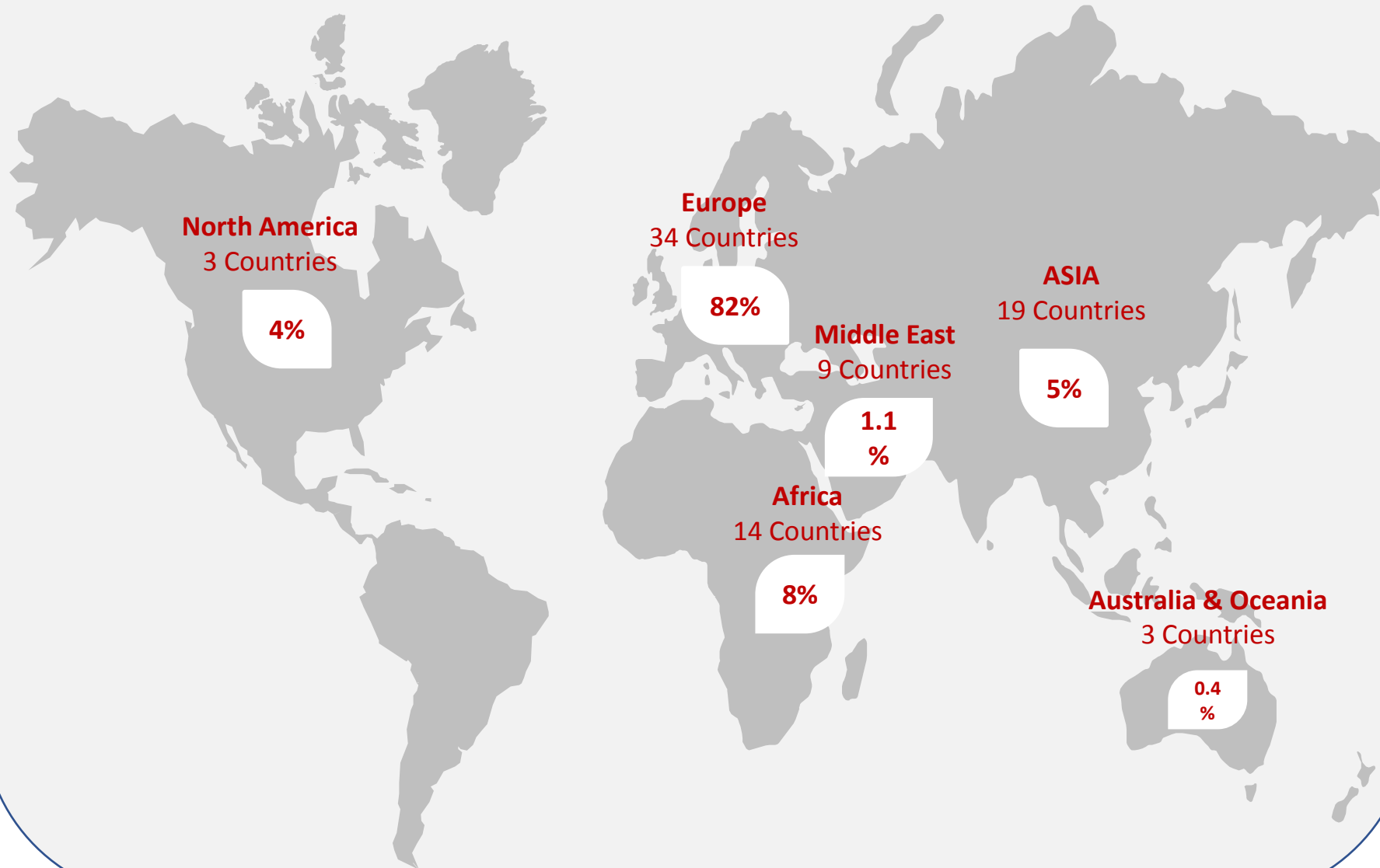
5% ↑
2015-16

Food & Drink Sector



Sector	2010 Rs Mn	2011 Rs Mn	2012 Rs Mn	2013 Rs Mn	2014 Rs Mn	2015 Rs Mn	2016 Rs Mn
Seafood	7,712	7,650	10,210	11,334	10,760	9,490	10,025
Sugar	7,708	8,224	8,130	9,482	7,714	7,655	7,900
Animal feed	474	543	762	799	791	922	875
Live animals	859	676	678	557	753	696	739
Processed food	558	618	669	804	502	474	536
Spirits & Beverages	175	235	235	202	213	263	303
Molasses	402	153	333	171	182	112	246
Fresh Fruits, Vegetables & Cut Flowers	198	189	255	258	229	217	226
Wheat or meslin flour			0.07	0.12	265	321	211
Tobacco	77	44	68	25			
Total Food & Drink	18,166	18,335	21,343	23,636	21,412	20,155	21,066

Export Destinations by Region (2016)



Top Destinations

- Italy Rs 4.6 bn
- United Kingdom Rs 3.7 bn
- Spain Rs 2.6 bn
- Netherlands Rs 1.6 bn
- France Rs 1.4 bn
- Kenya Rs 0.9 bn
- USA Rs 0.74 bn
- Greece Rs 0.7 bn
- Portugal Rs 0.5 bn
- Madagascar Rs 0.5 bn

Seafood

Preserved Tuna in Cans, Pouches & Jars



67,237 Tons
Rs 9.0 billion

Frozen Fish: Tuna Loins & Steaks



4,868 Tons
Rs 812 million

Fresh/Chilled Fish: Red Drum, Seabass



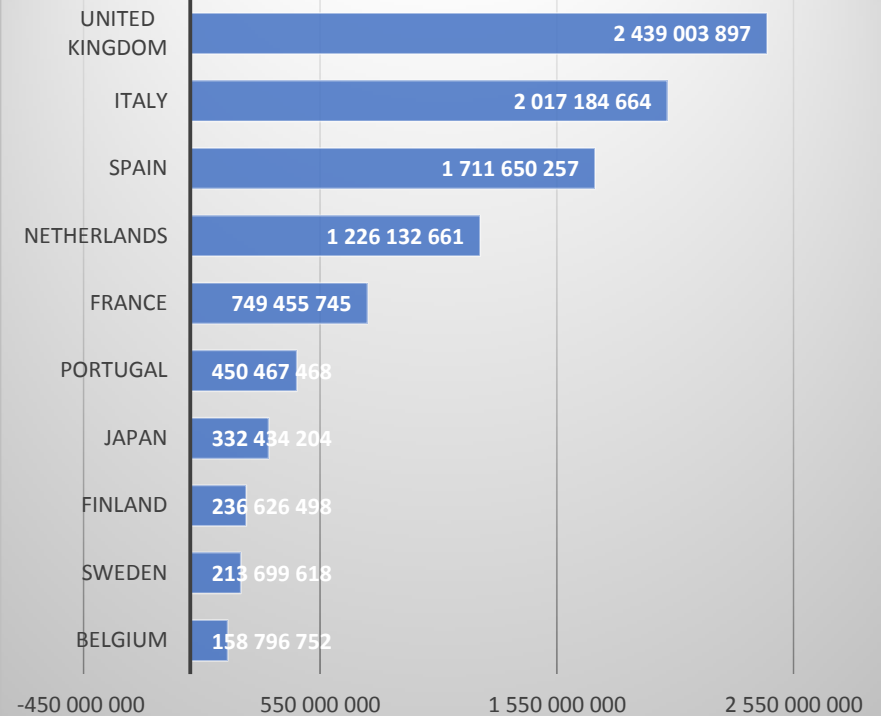
726 Tons
Rs 204 million

Salted / Smoked Fish



23 Tons
Rs 3 million

Top 10 markets in 2016 (Rs)



Opportunity:

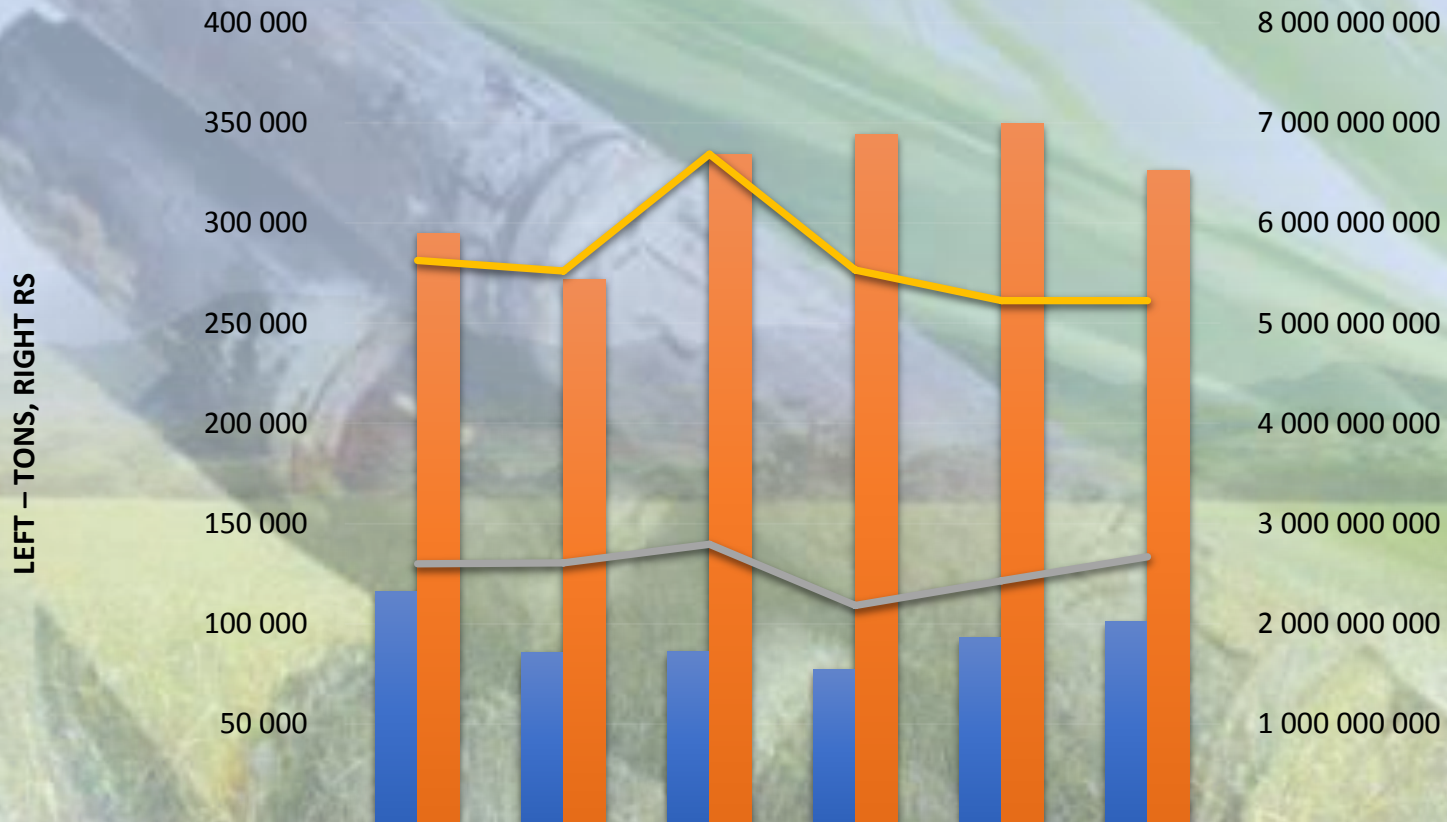
- High demand for seafood
- Product diversification (Aquaculture, tropical fish)
- Market diversification: UAE, Russia, China

Challenges:

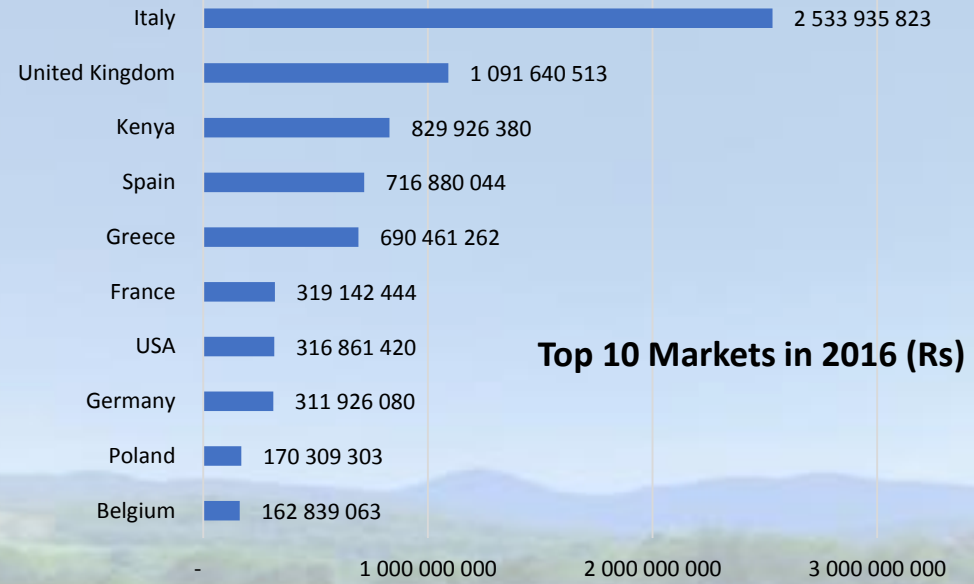
- Price competition with Ecuador, Thailand & Philippines
- EU Certification

Sugar

Export Trend



	2011	2012	2013	2014	2015	2016
Special Sugar - Tons	116 009	85 675	86 031	77 199	93 133	101 250
White sugar - Tons	294 887	272 069	334 344	344 402	349 651	326 419
Special Sugar - Rs	2 597 879	2 610 083	2 794 772	2 183 612	2 429 615	2 670 035
White sugar - Rs	5 626 420	5 520 449	6 688 212	5 531 149	5 226 229	5 230 900

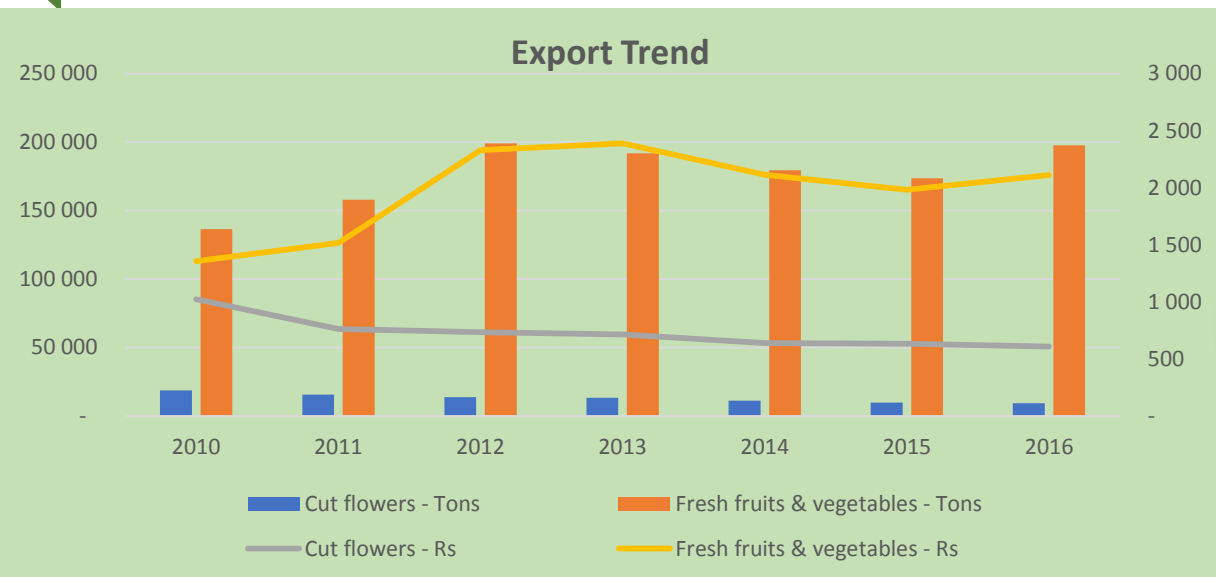


Top 10 Markets in 2016 (Rs)

Italy	2 533 935 823
United Kingdom	1 091 640 513
Kenya	829 926 380
Spain	716 880 044
Greece	690 461 262
France	319 142 444
USA	316 861 420
Germany	311 926 080
Poland	170 309 303
Belgium	162 839 063



Fresh Produce – Fruits, Vegetables & Flowers

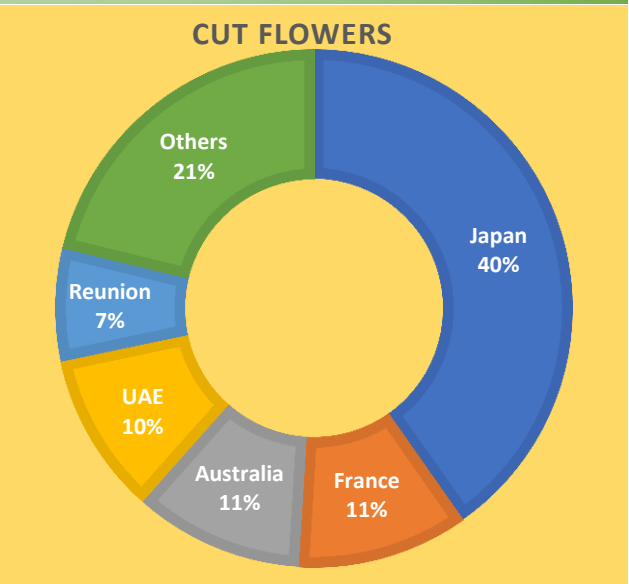
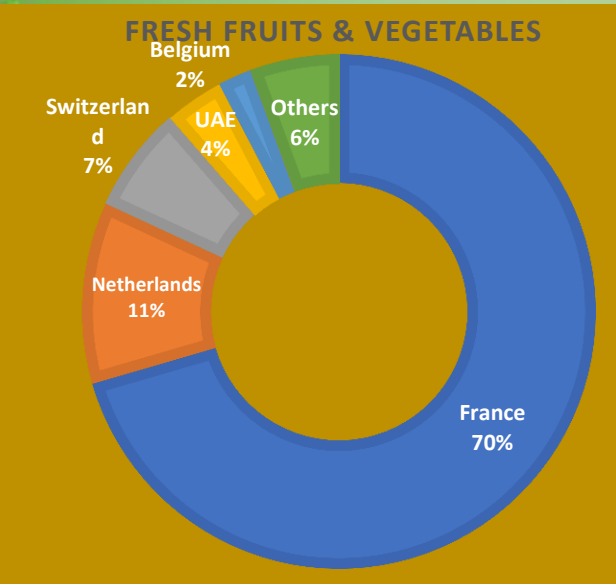


Challenges:

- Global Gap certification for EU
- Air Freight (high cost, no direct line)

Opportunities:

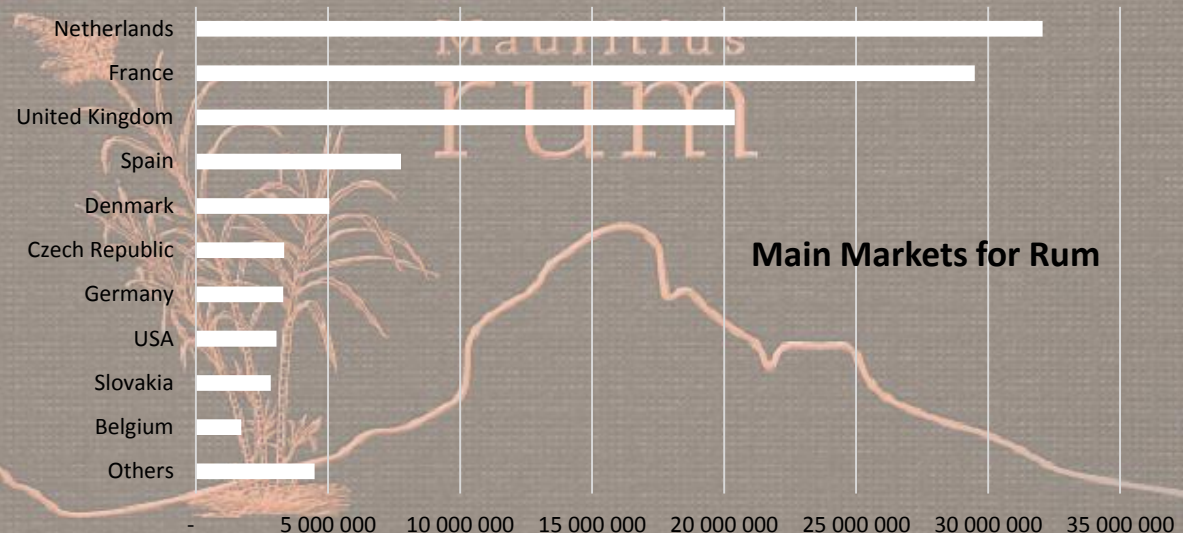
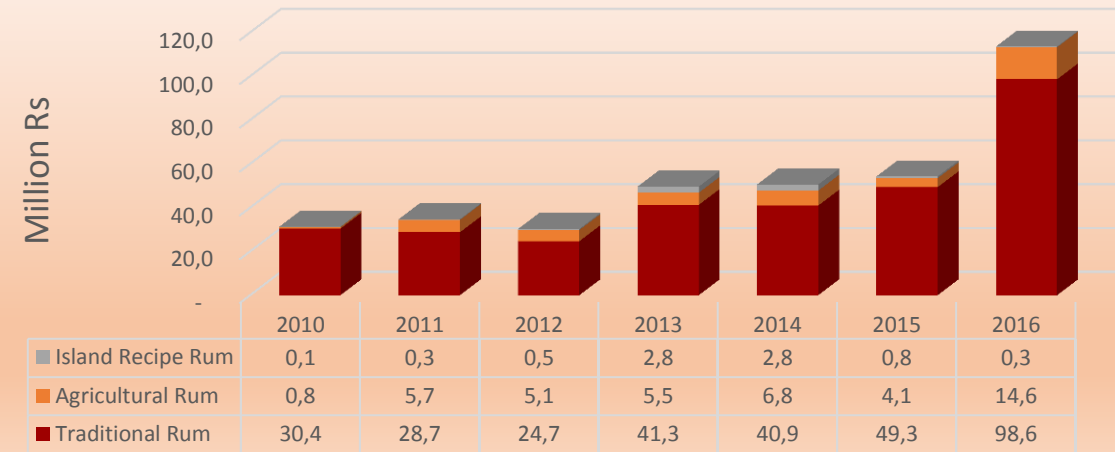
- New Market: Middle East, Russia, China, Turkey
- Speed to market scheme - EU
- Increasing demand for Organic fruits – niche
- Grouping of small planters – capacity & effective marketing



Spirits & Beverages



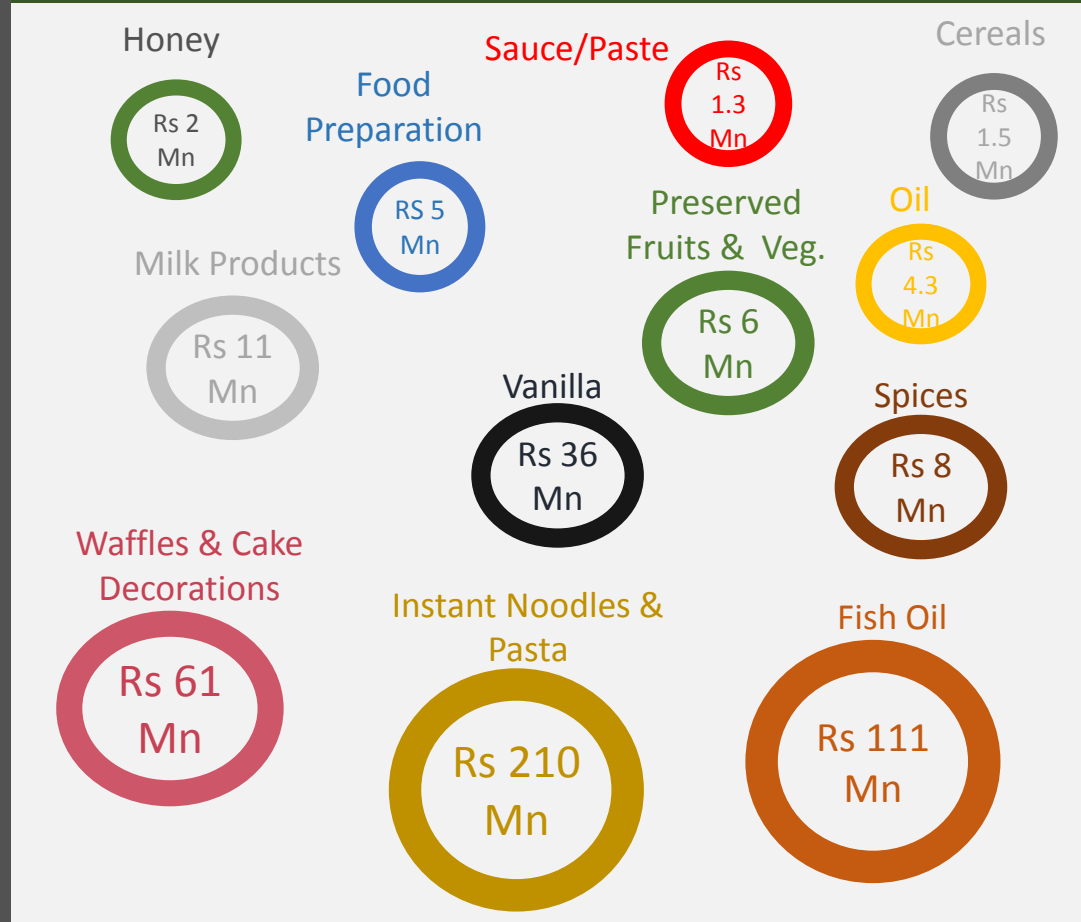
Export Trend - Rum



Processed Food

Other Products <Rs 1M:

- Jams
- Fruit Paste
- Chewing Gum
- Jellies
- Tea
- Coffee
- Ice Cream
- Vegetable Burgers
- Peanut Butter
- Chocolate
- Juice



MARKETS

Instant Noodles: Madagascar (66%), France (24%), Zimbabwe (6%)

Fish Oil: Netherlands, Thailand, Australia, China, Malaysia

Cake Decorations/Waffles: Italy (57%), Russia (17%), Turkey (12%), Reunion (7%)

Vanilla: Denmark, France, Taiwan, Turkey

Seychelles: Milk, Chewing gum, Honey, Spices, Jams

USA: Rice (Health Rice)

Reunion: Mixes of flour, Cereals, Chili Sauce, Chewing gum, Spices



Mauritian Diaspora in France, UK, Australia

Our Objectives

EXPORT PROMOTION

Promote Mauritius as a reliable and preferred sourcing destination for quality products & services

Consolidate & expand market shares in Traditional Markets

Diversify into New & Emerging Markets

Consolidate & expand market shares in Regional Markets

EXPORT DEVELOPMENT

Promote **Enterprise Development** to enhance export readiness

Assist enterprises in achieving market conformity in terms of quality, standards & norms

EXPORT PROMOTION

International Trade Fairs



Buyer Seller Meets (BSM)



Contact Promotion Programmes



Market Surveys/
Field Investigation



Local Fairs



In-Store Promotions



Inward Buying Missions



EM Bears the costs related to:

- Rental of space
- Design & Construction of Mauritian Pavilion
- Consultant for B2B meetings

Company bears costs related to:

- Airfare & Accommodation (SMEs – SMEDA Scheme)
- Freight of samples
- Marketing tools – brochure, website, artworks

Mauritius – Your Reliable Sourcing Partner



www.sourcemauritius.com

Strategically located in the **Indian Ocean**, along the trading route between **Asia** and **Africa**
Mauritius is ranked **First** in **Africa** in the World Bank Doing Business Report 2015.



EXPORT PROMOTION

International Fairs 2016

25
Events

50
Companies

29
SMEs



TRADITIONAL

SIAL – Paris
Seafood Expo Global – Brussels
Germany - Fruit Logistica, Prowein,
Netherlands – PLMA
Australia - BSM

AFRICA & IOC

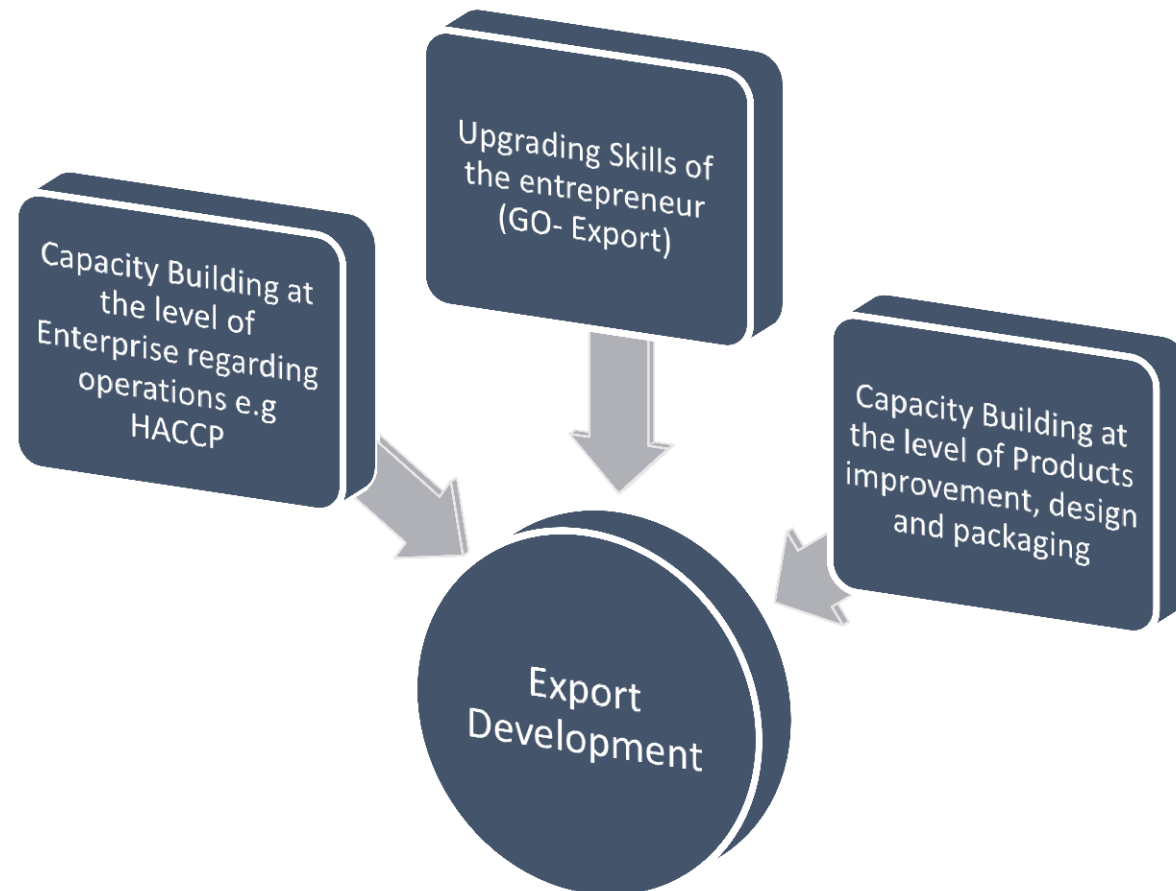
Reunion – 3eme Foire & BSM
South Africa – SAITEX (AB7) & BSM
Kenya – BSM Nairobi & Mombasa
Zimbabwe – BSM, Tanzania – CPP, Zambia - CPP

NEW & EMERGING

Dubai – Gulfood & SEAFEX
Russia – World Food Moscow
China – BSM & Guangdong Fair
Hong Kong – Vinexpo & CPP
Czech Rep. - BSM

Export Development

To enhance the export readiness of SMEs with a view to increase their competitiveness to enable them to maximise on opportunities arising out of growing global exports markets.



Go-Export 1

The Go-Export initiative was designed to improve the **skills** of **entrepreneurs** through a carefully branded **coaching, training** and **hand-holding** programme.

Main Topics:

1. Entrepreneurial Skills
2. Production / Operations
3. Product Development
4. Financial Readiness
5. Export Strategy & Export Potential
6. Export Procedures & Documentation



200 SMEs trained, including
60 from Rodrigues

GO EXPORT 2

In-house technical training

Exporting to Africa

Workshop, Manual for Export
Marketing and Selling your Products



Technical Assistance – Food Preservation

Funded by: “Agence Francaise de Developpement” (AFD)

15 companies (14 SMEs)

Products: Fresh fruits, Pickles, Honey, Moringa Tea, Crystallised Fruits, “rhum arrange”, banana chips, garlic in brine, Cassava & Breadfruit Flour, Fruit Jams, Herbal Teas

PROCESS LAYOUT / EQUIPMENT / FOOD SAFETY

Seminar on KOSHER Certification

Agro Companies & Hotels

HACCP & Global Gap Implementation (funded by EU)

Gap Analysis

7 Companies – Global Gap

13 Companies – HACCP

Training & Implementation

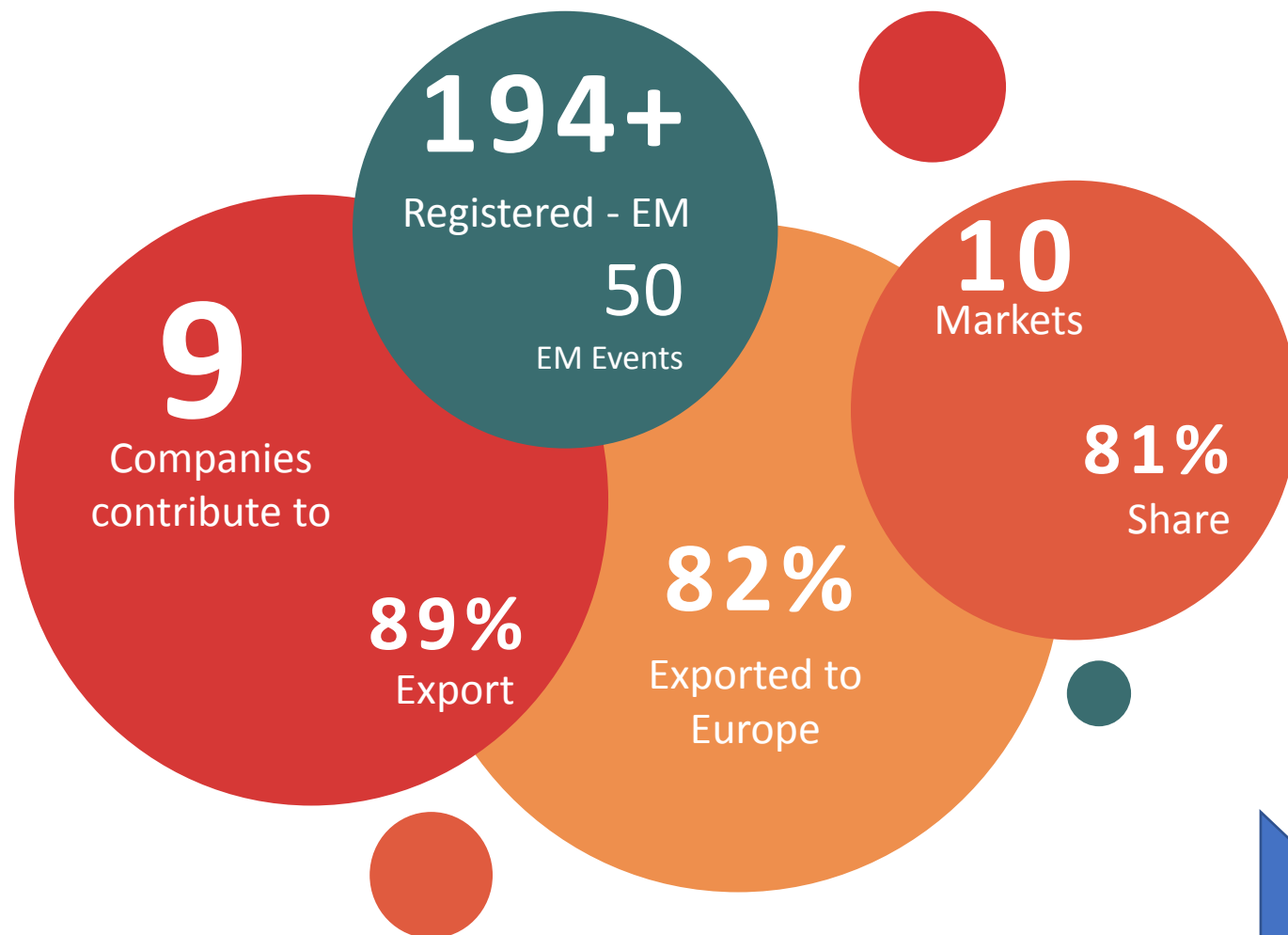
Company - Certification

GAP ANALYSIS – HACCP

(système d'analyse des dangers - points critiques pour leur maîtrise)

- **Factory Location [residential areas/industrial]**
- **Layout/Flow**
- **Factory Environment and Process Control**
- **Pest Control Programme**
- **Management Commitment & Continual Improvement**
- **Food Safety Policy**
- **Pre-requisite Programme PRP**
- **Supplier Certification**
- **Allergen Management**
- **Testing**
- **Maintenance**
- **Traceability and Recall**

STATUS OF EXPORT IN THE AGRO INDUSTRY



Current Exporters:

Products mainly geared to European Markets
Abide to international standards: HACCP, BRC, ISO 22000
Target mainly Niche Market
Good Packaging
Preferential Market Access (EPA, SADC, COMESA, AGOA, FTA Turkey, PTA Pakistan)

New Exporters:

Lack of Food Safety / Compliance to Norms
Lack of Supply Capacity
One man Business
No proper Marketing Strategy / Plan
Lack of Innovation & Creativity
Limited Product Development
No investment in Technology

Export Potential

EUROPE

Special Sugars
Preserved Tuna
Frozen Tuna
Fresh Fish
Rum
Frozen Snacks (veg)
Fresh Fruits & Veg.
Niche:
Vanilla Products
Specialty Food
Pickles, Herbal
Teas, Chili Paste,
Fruit Paste

NORTH AMERICA

Special Sugars
Frozen Tuna
Fresh Fish
Cut Flowers
Rum
Cake Decorations
Vanilla Products

MIDDLE EAST

Special Sugars
Fresh Fish
Fresh Fruits
Juice
Instant Noodles
Pasta
Honey
Jams
Pickles
Spices
Animal Feed
Cake Decorations

AFRICA & IOC

Wheat & Flour
Animal Feed
Special Sugars
White Sugar
Instant Noodles
Pasta
Biscuits
Snacks
Chili Paste
Juice
Bulk Rum
Branded Rum
Beer

ASIA

Frozen Tuna
Fresh Fish
Rum
Special Sugars
Animal Feed
Cut Flowers
Honey
Tea
Vanilla Products
Fish Oil

Trends in Food Consumption

Convenience Food
Dried / Frozen



Canned Fruit
Pineapple / Lichi



Organic

Spice – Curry Paste



Dried Fruits & Veg.



Gluten Free

Fruit Pulp /
Concentrate



Herbal Teas



Halal & Kosher

Challenges

- Economies of scale – production capacity
- Hazard Analytical Critical Control Point (HACCP) Certification
- No competent authority for meat, poultry & honey (cannot export to EU)
- Slaughter house not to EU standards
- Adapt product to Market
- Product packaging – varies per market
- Frozen food – need 1 full container 20ft
- Price Competitiveness (cost of labour, machinery)
- Branding very costly
- High air freight cost
- Lack of direct flights (e.g Russia, Middle East)

Opportunities

- Participation in International Events to meet with buyers
 - EM led events
 - Speed to Market Scheme (Air Freight - Europe) – 40% refund
 - Freight Rebate Scheme for exports to Africa, Madagascar and Reunion
 - Participation in International Fair Scheme (SMEDA)
- Market Diversification
- Product Diversification
 - Increasing demand for Convenience food
- Duty free access
- Export of exotic fruits and processed fruits and vegetables
- **Private Labelling** – sell goods under Retailer’s brand (Supermarkets, Hypermarkets, Retailers)
 - Branding – too costly
 - World of Private Label - PLMA Netherlands (2014 & 2015) & Chicago (2014)
 - Special sugars, Caramel sweets, Rum, Wine, Vanilla products, Ice Tea

Business Life Cycle - Internationalisation

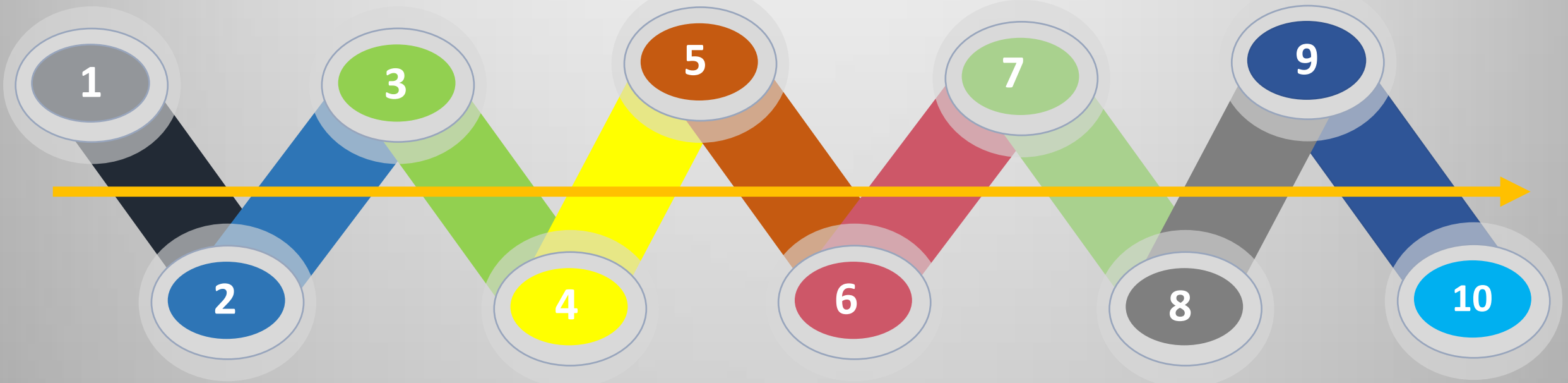
Business Plan
 Market Research
 Equipment
 Sourcing of Materials
 Target Market (local & export)
 Financial

Operations Management
 Productivity
 Compliance to norms

Export Initiatives
 Go-Export Training
 Assess Export Readiness
 Attend Intl. Fairs for B2C in the region
 Market Testing/ Research

Export Development
 Market Penetration
 Attend Intl. Fairs B2B
 - Africa & IOC
 - Europe

Export Development
 Market Diversification
 Attend Intl. Fairs B2B
 - Middle East, Asia
 Product Development
 Resource Optimisation



Start Business
 Production Unit
 Manufacturing
 Packaging
 Sales

Local Marketing
 Distributor
 Advertising
 Social Media
 Established Presence
 Branding Strategy

Industrial Base
 Technology
 Industrial Engineering
 TQM System
 HACCP Certified
 Growth rate of 5 – 10%

Export Development
 Market Consolidation
 Attend Intl. Fairs B2B
 - Africa & IOC
 - Europe

Business Process Re-Engineering
 Eliminate MUDA
 Enhance value addition

Thank you