

Standards and Market Preferences: Opportunities and Constraints

Eastern and Southern African Video Conference on High Value Horticulture

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Mozambique position paper

Background

The strategic vision for Mozambique's horticultural sub-sector, notably tropical and sub-tropical fruits was originally prepared in 2003/4, and while the end goals remain the same there have recently been some significant developments that need addressing if these goals are to be reached. Chief among these developments have been the investment in large-scale export banana production in Nampula Province from 2007, in vegetable production in Vanduzi, Manica Province onwards, and the more recent discovery of Asian Fruit Fly in some areas of Mozambique. While the Asian Fruit Fly should not prevent the large-scale extra-regional horticulture exports, it is raising some serious medium-term impediments to the future development of the fruit and vegetables sub-sectors as a whole.

While Fruit Fly is a threat in Mozambican Horticulture Industry, the country still in a very early stage of commercial production of high value horticulture products, having some commercial productions spread in the Southern, Central and Northern. Some of these Businesses are already individually certified to export the products to the European Markets. This makes the horticulture commercial sector vulnerable and dependant on very few market choices. The lack of knowledge of standards governing the production and commercialization of horticulture products to the regional and international markets is another constraint which the industry faces with, apparently making the markets not available for the Mozambican Horticulture Products.

IPEX (Mozambican Institute for the promotion of exports) is piloting a project of certification of some horticulture producers (particularly of fruit) to turn them compliant with GLOBALGAP certification for further dissemination among other producers. On the other hand INNOQ (Mozambican Institute for Normalization and Quality) has a set of quality standards for Horticulture products which are not therefore following due to low disseminate rate among the horticulture producers.

Standards enforcement is also weak consequently application of International and domestic standards not traceable, therefore not recognised at the end leading markets.

1.0 Present application of International and Domestic Standards

1.1 International Standards

Some emergent commercial horticulture companies such as CITRUM and Banalândia in Maputo Province, Companhia do Vanduzi in Manica Province, among others have individually initiated their certification processes to access international markets for their horticulture products.

International Standards are recognized only by some companies wishing to initiate export plans. Commonly Mozambican producers start producing horticulture products without a vision of the target markets therefore not looking at the compliance of international markets standards in their production and commercialization activities. Sometimes this is initiated only when critical mass production is reached and local and regional markets are not options posing a need to look at other markets at International levels. The fruit fly situation which turns the Southern African and Zimbabwean markets not accessible to the Mozambican horticulture products is also a situation that makes some producers looking at complying with International Standards to access alternative markets such as European.

IPEX, as a way of disseminating the culture of compliance with international standards is implementing a pilot project whereby is assisting some emergent commercial producers to certify their production and commercialization products to European markets through GLOBALGAP and HACCP certifications. IPEX is also working to build capacity to influence the policies and legislation favorable to the development and growth of exports.

1.2 Domestic Standards

As stated above at the domestic level there is very low knowledge of standards among the horticulture producers and sometimes can be confused with very low interest of the producers in knowing and applying the standards in their activities. There is a little knowledge of quality standards through the experience and empirical knowledge of the producers.

Mozambique through INNOQ has developed the following Standards for horticulture products, namely:

- NM 24:** Pawpaw – Specifications
- NM 25:** Pineapple – Specifications
- NM 26:** Bananas – Specifications
- NM 43:** Mango – Specifications
- NM 44:** Litchi – Specification

NM CAC/RCP 44: International Code of recommended practices for packing and transport of tropical fresh horticulture products.

NM CAC/RCP 53: Codes for Hygiene practices for fresh fruits and horticulture.

NM 55: Green banana – Management for storage and transport.

NM 69: Orange – Specifications

NM 70: Grape fruit – Specifications

NM 71: Citrus – Storage guidelines

NM 72: Fresh pineapple – Storage and transport

NM 74: Potatoes – Storage guidelines

NM 75: Fresh tomatoes – Specification

NM 86: Green beans – Specifications

NM 90: Green beans – Storage and refrigerated transport

NM 103: Taxonomy of fruit species

NM 111: Ginger – Specifications.

Within the Mozambican horticulture processing industry only three companies are applying standards within their processing plants due to their target market requirements.

2.0 Opportunities and Constraints

2.1 Opportunities

Mozambican Horticulture industry is in its very early stage of development, and it is in a position to apply international and domestic's standards to have full access to preferential markets. The good agro-ecological conditions of the country offering a window in the international markets combined with appropriate dissemination and adoption strategy of international or domestic standards at this early stage can benefit the emerging industry to position itself in the international horticulture market.

2.2 Constraints

The main constraints facing the horticulture industry in Mozambican are:

- Lack of knowledge of the horticulture industry (new industry)
- Lack of sound business plans indicating the target markets of the horticulture products and strategies to reach them.
- Lack of knowledge of the international target markets
- Lack of knowledge of International and Domestic standards
- Lack of appropriate dissemination strategies at an early stage