

A TRANSFORMATIONAL YEAR



2020 ANNUAL REPORT

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## FINANCIALS

BDO USA, LLP, accountants and consultants, audited the NMB financial statements of fiscal 2020 and issued a report on March 10, 2021. The audit was conducted in accordance with auditing standards generally accepted in the USA and Government auditing standards. BDO USA, LLP also reviewed and tested the NMB internal control over financial reporting and compliance and found all practices to be in accordance with applicable laws, rules and regulations.

## REVENUES

Assessments Fresh \$8,956,230

Assessments Frozen \$1,512,671

Interest income \$93,558

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**Total revenues \$10,562,459**

## EXPENSES

### Program Expenses

Marketing..... \$4,621,100

Research..... \$1,321,392

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**Total program expenses ..... \$5,942,492**

**General and administrative expenses ..... \$691,869**

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**Total Expenses..... \$6,634,361**

Change in net assets without donor restrictions ..... \$3,928,098

Net assets without donor restriction (beginning of year)..... \$8,073,713

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**Net assets without donor restrictions (end of year)..... \$12,001,811**



### BRING THE ANNUAL REPORT TO LIFE!

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## MISSION

**Increase the consumption of fresh mango in the U.S. by inspiring consumers and educating them about the culture, flavor, and nutrition of mangos, while bringing the industry together.**

## VISION

**For mangos to move from being an exotic fruit to a daily necessity in every U.S. household.**

## STRATEGIC PRIORITIES

- 1. Deliver High-Quality and Flavorful Mangos:** Establish and maintain a consistent high-quality product and improve the flavor profile as delivered to the consumer.
- 2. Market Positioning:** Deeply understand our strategically most valuable audience(s) and develop a clear, long-lasting, inclusive positioning/messaging platform which is consistent across channels.
- 3. Consumer Education:** Understand and dimensionalize key consumption barriers and create and execute strategies to enhance consumer familiarity and understanding.
- 4. Market Penetration:** Drive mango market penetration at retail and foodservice.
- 5. Industry Service:** Improve value-add and industry satisfaction for the mango industry.

## 2020 BOARD OF DIRECTORS

**JoJo Shiba**, Chair, Importer District 2

**Clark Golden**, Vice-Chair, Importer District 1

**Rodrigo Diaz**, Secretary, Foreign Producer

**Marsela McGrane**, Treasurer, Importer District 4

**Thomas Hall**, Marketing & Communications Committee Chair, Importer District 2

**Eddy Martinez**, Research & Industry Relations Committee Chair, Foreign Producer

**Jacquie Swett**, Industry Relations Officer, Foreign Producer

**Carlos R. Palafox**, Foreign Producer

**Cesar Morocho Marchan**, Foreign Producer

**James S. Watson**, Importer District 3

**Jean-Christophe Hestean**, Frozen Mango Importer

**Jerry Garcia**, Importer District 2

**Joaquin Balarezo Valdez**, Foreign Producer

**Jorge Sosa Perez Sandi**, Frozen Mango Processor

**Michael B. Warren**, Ex-Officio, Importer District 1

**Norberto Galvan Gonzalez**, Foreign Producer

**Patrick F. Dueire**, First Handler

**Dr. Richard J. Campbell**, Importer District 3

**Stuart Johnson**, Domestic Producer

**Xiomara Elias Argota**, Frozen Mango Importer



# MESSAGE FROM THE EXECUTIVE DIRECTOR

2020 was a year like no other in terms of the impact on consumer behavior and how business was conducted. Within a matter of a few short weeks, COVID-19 changed how we live and work across the world. These changes caused uncertainty and challenges that pushed many industries and commodities to the breaking point. The National Mango Board (NMB) also faced moments of adversity, but we remained focused on our mission and objectives and the outcome is that mango was one of the few fruits that experienced overall increases in both volume and value in multiple categories for the year.<sup>1</sup>

Throughout the year as campaigns and projects had to be postponed or canceled, the NMB found ways to pivot and maintain mango top-of-mind. As consumers focused on staying healthy, finding inspiration, and making every dollar count, the NMB Marketing & Communications effort highlighted the nutritional benefits and versatility of mango, and generated ideas on how to enjoy mango in multiple ways. Although mango had already established a strong presence online through social media, we found ways to expand its digital presence at retail. By working with retailers, we developed new strategies that were first of their kind in commodity marketing and helped position mango front-and-center for online shoppers. At the same time, the NMB Research & Industry Relations program worked with the mango industry to maintain crop projections and supply-related information as current and accurate as possible, while also supporting the industry with information and educational materials to address concerns raised by COVID-19.

In a year that was significantly impacted by a global pandemic, the combined efforts of the industry and the NMB resulted in several highlights and new records for the mango category:

- Fresh whole mango imports in the U.S. increased by 11.4% from 493,000 metric tons to over 549,000 metric tons. Fresh whole mango arrivals saw eight weeks of over 4 million boxes/week; compared to



**“I HAVE NEVER BEEN PROUDER OF THE EFFORT AND DEDICATION THAT WAS PUT FORTH BY THE BOARD MEMBERS, NMB STAFF, AND ALL OUR PARTNERS...”**

prior years where the peak had been one or two weeks of 4 million boxes/week.

- At retail, mango advanced in the ranks of the top fresh whole fruits to the 12th overall position in volume/store/week; and also increased by 19.4% in dollars/store/week to move up from the 20th position to the 17th overall position.
- In the fresh-cut fruit category, mango was one of the three fastest growing items in terms of overall retail sales with an increase of 7.9%, moving up to the 7th overall position.
- In the frozen fruit category, mango was the fastest growing item in dollar/store/week, with an increase of 46% growth in one year.
- U.S. per capita consumption of mango increased by 12%, reaching 3.63 pounds per person.

The NMB recognizes all who have been impacted by this pandemic, especially those who have lost loved ones. We also acknowledge the contributions of everyone involved in the mango supply chain: from the businesses that found ways to continue operating; the front-line workers that worked through adverse conditions; the retailers who believed in mango and brought us back to grocery shelves as soon as possible and committed more display space than ever before; and consumers who keep choosing mango. Finally, I have never been prouder of the effort and dedication that was put forth by the board members, NMB staff, and all our partners to turn a dire situation to one of opportunity and success for the mango industry.

Only time will tell how many of the changes we have experienced in 2020 will become permanent; but regardless of what the future holds the NMB is always ready to keep moving mango onward!

All the best,

**Manuel Michel**  
NMB Executive Director



1 Van Den Broek, A., 2021. Mango consumption pushes up in 2020. [online] Freshplaza.com. Available at: <<https://www.freshplaza.com/article/9278923/mango-consumption-pushes-up-in-2020/>>

## MESSAGE FROM THE CHAIR

2020 indeed brought us a year of incredible challenges, but despite it all, the NMB and its board members remained steadfastly united and fearless in its efforts to address each challenge head on. I am enormously proud of the exceptional work the NMB did this year, and extremely honored to have served as the Chair in 2020.

The NMB marketing team suddenly found itself confronted with crucial decisions regarding the already-approved plans for 2020. Our newly-hired Marketing Director, Tricia Bramley, had barely set up her desk when she had to do an immediate assessment and completely redo the marketing strategy for the year. With help of the Executive Director, Manuel Michel, the NMB staff, and the support of the board members we were able to pivot and execute digital marketing campaigns that would create a consistent buzz for mangos. Foodies and celebrities alike found new and imaginative ways to make mangos a part of their lives and post about them on social media. Suddenly mangos became an exciting and creative menu item during the pandemic.

The NMB retail team also did an exceptional job creating programs and encouraging retailers to promote during an unprecedented year. While many retailers struggled to keep their workforces safe and customers socially distanced, the NMB created new ways to help move mangos. We saw that placing mangos near citrus items in retail produce departments and educating consumers



**“THANK YOU ALL FOR YOUR  
COMMITMENT AND TIRELESS  
SERVICE THIS YEAR.”**

through an omnichannel effort on the health benefits of mangos made a big difference in movement. Consumers want to stay healthy and avoid COVID infection as much as possible. The continued health and nutritional messaging that the NMB provides has had a significant impact on how consumers view mangos, and we are starting to see mangos become more and more of a necessity in many households.

Many thanks to all the stakeholders that support the work of the NMB and voted to approve the continuance referendum. Without the help of the NMB, the mango industry would not have experienced the success it had in 2020. Many other commodities suffered during the pandemic creating historic losses for some, but mangos grew in movement and consumer popularity for both the fresh and frozen industries. Unfortunately, the frozen industry voted to opt out of the Mango Order and

will no longer be a part of the NMB. We will invest the frozen assessments by providing research projects and materials that will help improve quality and best practices for their industry in 2021.

Our new strategic plan for 2021-2023 will guide the industry towards responsibly producing high quality, great tasting mangos. Our goal for mangos is to become a top 15 whole fruit by value in the U.S. by 2025. We gained a lot of momentum in 2020 and were able to shift to marketing strategies that paid off and moved mangos closer to our goal. We are confident that mangos will continue to rise in popularity, and we expect to achieve that goal perhaps sooner than expected. A focus on developing sustainable best practices for human and environmental health was added to the plan this year. The climate crisis the world is facing puts a spotlight on how industries treat the earth and its resources. The NMB is committed to helping all stakeholders find better solutions and practices for both current and future mango production.

In a year that seems as though we tackled enough challenges to last a lifetime, I am extremely thankful to have had the support of the NMB staff and the help and guidance from my fellow board members. Thank you all for your commitment and tireless service this year. The people who serve on this board are the best in the industry and committed to success. I am forever grateful to have had the opportunity to work with and learn from each one. In this most challenging year, I saw firsthand the resiliency of the mango industry and the special relationship it has with the NMB. I am confident we will continue to see growth and success for years to come through this partnership. Thank you for trusting me to serve as your chair.

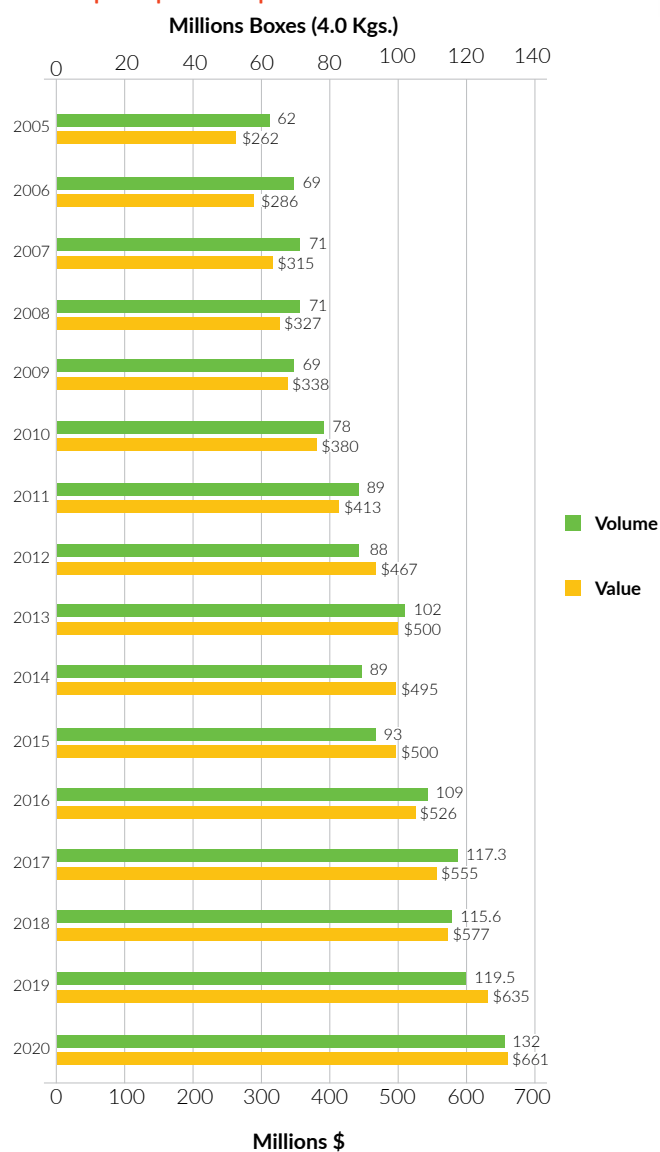
**JoJo Shiba**  
**NMB Chair 2020**



# VOLUME AND VALUE

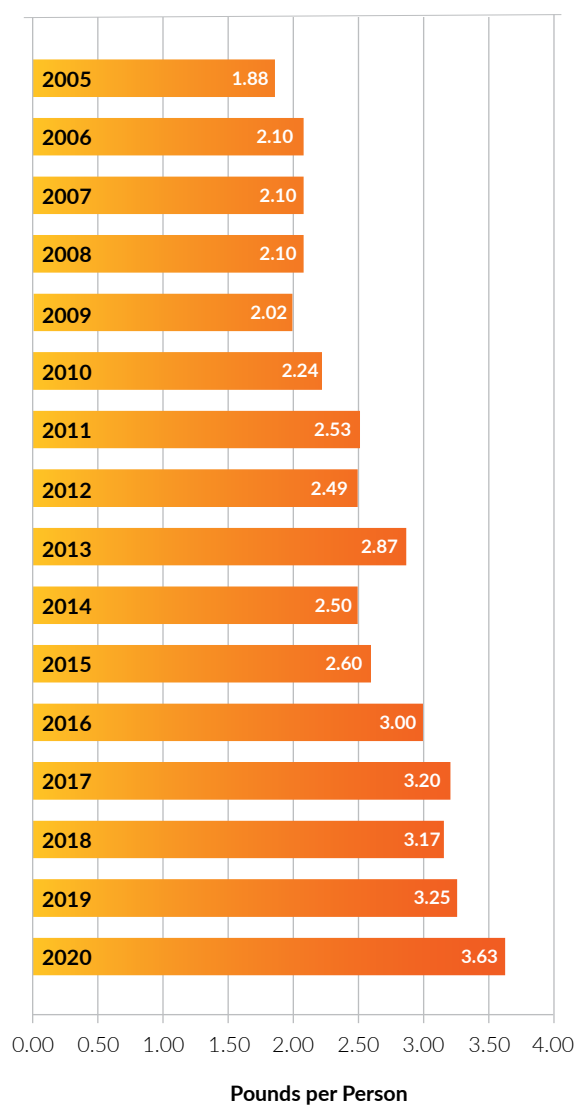
## MANGO IMPORT VOLUME AND VALUE FOR FIVE MAIN COUNTRIES

MEXICO, PERU, ECUADOR, BRAZIL & GUATEMALA



Sources: USDA Market News & National Mango Board

## PER CAPITA AVAILABILITY



Sources: 2005-2018 USDA Economic Research Service; \*2019-2020 NMB calculation.

# NMB STRATEGIC PRIORITY I

## DELIVER HIGH-QUALITY AND FLAVORFUL MANGOS

**Establish and maintain a consistent high-quality product and improve the flavor profile as delivered to the consumer.**

### RESEARCH-BASED EVIDENCE

Providing high quality mangos that consumers will purchase again and again requires a commitment to quality and safety by each member of the mango industry. The NMB invested in the following projects that focus on production and postharvest research and enhance mango quality and safety. Some research projects' timelines were affected by the pandemic, and will be conducted and published in the subsequent years. Once projects are completed the full reports are posted on [mango.org/research](http://mango.org/research).

#### Projects found on Mango.org:

- Pests and Diseases in Mango (Literature Review).
- Evaluation Model Report.
- Mango Category Sizing.
- Mango Category Shrink at Retail.
- Nutrition and Fertilization (Literature Review).
- Validation of the "Heat Units" Technique.
- Protocol of Best Practices for Packaging Mangos.
- Parthenocarpic Mango.
- Diagnosis of the Export Mango Chain.

#### Projects affected by the pandemic:

- New Mango Cultivar Evaluation (Phase II).
- Demand of Nutrients in Mango.
- Improving Mango Fruit Quality.
- Technologies to Improve Mango Size.
- Agricultural Gypsum.

### NUTRITION AND HEALTH PROGRAM

COVID-19 only further highlighted the importance of understanding nutrition and living a healthy lifestyle. Three peer-reviewed publications were released in 2020 highlighting the potential health benefits of mango on skin health (University of California, Davis), inflammatory bowel disease (Texas A&M University), and the pharmacokinetic characterization of mango polyphenols (Illinois Institute of Technology). More research is needed to confirm the results of these pilot studies.

Research in this area is designed to provide information about the phytochemical compounds and nutritional value of the main mango varieties consumed in the U.S. as it relates to human health, primarily with obesity, diabetes, cardiovascular health, and novel areas like skin health. Further research is needed to continue increasing knowledge around the health benefits of mangos.

### FOOD SAFETY AND SUSTAINABILITY

The food safety and sustainability program aims to provide scientific-based information to the mango industry to enhance the safety of mangos in the U.S. and engage producers and packers in reducing their environmental and social footprints with easy-to-implement sustainability practices.

The [\*\*Mango Food Safety website \(www.mangofoodsafety.org\)\*\*](http://Mango Food Safety website (www.mangofoodsafety.org)) provides valuable tools to the industry and is a practical application of the Food and Drug Administration Food Safety Modernization Act. These tools are versatile and easy to use from printing hard copies, including on a flip chart format, to downloading on smartphones and tablets. Hosting or planning workshops on the farm or within the packing house facility is easy to facilitate with the applications found on this website.

The [\*\*Mango Sustainability website \(www.mangosustainability.org\)\*\*](http://Mango Sustainability website (www.mangosustainability.org)) provides information related to sustainability and how activities can be classified in addition to the Sustainability Manual. This website addresses issues including how to become more sustainable, how to create and implement an action plan to adopt more sustainable practices, and how to evaluate current efforts as it relates to sustainability.

### FROZEN MANGO PROGRAM

Several projects were approved by the NMB Board to address some of the main needs of the frozen mango industry including:

- How to improve quality.
- How to increase supply of raw materials through the identification of potential new varieties.
- Identifying the nutritive value of the main varieties used by the industry.
- Conducting a literature review to identify alternatives for the use of mango by-product to add value to the industry.

The University of Florida conducted a consumer study to compare consumer acceptability of frozen mango from several common varieties. A literature review project is ongoing with University of California, Davis to collect all printed and electronic information available on frozen mango by-products, mainly peels and seeds, and their uses. Likewise, researchers from Texas A&M University are conducting a study to determine the nutritive value of the main varieties used by the industry. In addition, work related to a frozen mango protocol to improve quality is underway to determine the best maturity stage and conditioning temperature with ethylene to process the main varieties of mango.





# NMB STRATEGIC PRIORITY II

## MARKET POSITIONING

**Deeply understand our strategically most valuable audiences and develop a clear, long-lasting, inclusive positioning/messaging platform which is consistent across channels.**

### UNDERSTANDING THE MANGO CONSUMER

Consumer research informs the development of compelling marketing programs and messages that drive industry growth. These studies provide a wealth of information on what drives consumers' mango purchasing. Based on this consumer research, how to select, how to cut, availability and versatility remain the key messages for educating, inspiring, and driving mango awareness and consumption. In addition, the NMB is now measuring and tracking the consumer satisfaction rate of mango quality and flavor at purchase. In 2018, a baseline was set at 75.4% satisfaction rate with the goal to increase this by 10% by 2020. Great progress was made, increasing the satisfaction rate to 81% and research studies and programs are in place to continue improving consumer satisfaction. Furthermore, the NMB is also focused on increasing mango familiarity and consumption in younger consumers.

### CONSUMER SATISFACTION RATE ON MANGO QUALITY AND FLAVOR

2018  
75.3%

2019  
79.4%

2020  
81.0%



Source: National Mango Board/Metrix Lab Monthly Surveys 2018-2020.



### SHIFTS IN CONSUMER BEHAVIOR

COVID-19 was declared a national emergency in March 2020 and its repercussions were far reaching and will be felt for years to come. The United States economy suffered its steepest decline on record in the second quarter of 2020.<sup>2</sup> As the number of Americans on full or partial lockdown increased, the foodservice industry was one of the sectors quickest and hardest hit.

To better understand the overall effects on the mango industry and adjust marketing strategies accordingly, the NMB consulted with additional marketing experts and obtained information and reports on the changing consumer, retail, and foodservice landscape. According to the Food Industry Association (FMI), 78% of consumers made a change to where they shopped as a result of the pandemic with many consolidating shopping trips and going out less often or to fewer stores while others opted for online shopping and delivery.<sup>3</sup> As more consumers stayed home and many restaurants were closed, consumers shifted to cooking more of their own meals. According to FMI, 36% of consumers reported healthier eating habits compared to before COVID-19. Twenty percent also indicated they were trying new dishes more often. Since travel was not an option, consumers opted to travel via their kitchens by experimenting with preparing food from around the world.

Based on the significant shifts in consumer behaviors, the NMB successfully pivoted its 2020 marketing strategies to align more closely with the new consumer priorities and landscape. These changes included more emphasis on nutrition and health messaging, highlighting the overall versatility of mango, and inspiring consumers with new mango dishes and beverages across all digital marketing channels. The NMB developed a geofencing campaign, a first for the organization, developing highly-targeted advertisements based on characteristics including demographic information, affinity categories, and geographic location. On the retail front, the NMB worked with retail partners to develop customized digital campaigns that aligned with initiatives to create and sustain growth of the mango category in whole and fresh cut.

The NMB closely analyzed the results of these efforts and regularly adjusted newly-created marketing assets based on those that generated the highest favorable results, while also applying these consumer insights to more targeted campaigns. The results of these efforts are outlined in more detail in each of the strategic priorities.

<sup>2</sup> Pickert, R. "U.S. Economy Shrinks at Record 32.9% Pace in Second Quarter," Bloomberg.com (Bloomberg, July 30, 2020), <https://www.bloomberg.com/news/articles/2020-07-30/u-s-economy-shrinks-at-record-32-9-pace-in-second-quarter>.

<sup>3</sup> FMI and The Hartman Group, June 2020



# NMB STRATEGIC PRIORITY III

## CONSUMER EDUCATION

**Understand and dimensionalize key consumption barriers and create and execute strategies to enhance consumer familiarity and understanding.**

In 2020, the NMB consumer marketing initiatives kept mango top-of-mind with strategic programming and real-time pivots, paying special attention to highlight the flavor, versatility, and nutritional benefits of mango.

### HIGHLIGHTS

- Pivoted efforts to digital to continue to reach and engage with key audiences and inspire mango trial and consumption.
- A 70% increase in growth YOY in both website users and website page views.
- Saw 145% increase in blog page views.
- Garnered 4.1 million total program impressions around the nutrition program.

### EARNED MEDIA

Despite a crowded media landscape, dominated by COVID-19-related news, mango was featured in online, broadcast, and print placements highlighting the fruit's nutritional messaging, especially around Vitamin C, and versatility. By infusing data and trends insights, mango was inserted into conversations consumers were already having and searches they were making, resulting in 1.9 billion impressions. The Mango Tribe created thumb-stopping mango recipes throughout the year, amplifying key messaging and adapting to relevant social media and food trends. Through the Mango Tribe, the NMB gained 28 new recipes, which are now part of Mango.org, and generated more than 100 social media posts across the seven social media Tribe members. The Mango Tribe generated more than 1.1 million impressions from all social platforms and blogs.

### PAID MEDIA POSTS

The 2020 paid media efforts resulted in over 75 million impressions and over 377,000 link clicks to Mango.org, highlighting relevant mango messages to highly targeted audiences. There were seven major targeted campaigns throughout the year including International Women's Day in March, traveling through your kitchen in April/May, National Mango Month in June, and the fall and winter holidays campaign to continue to educate consumers and provide menu inspiration when many were experiencing menu fatigue due to the increase in at-home cooking during the pandemic.



## NUTRITION PROGRAM

The NMB continues to showcase mango as a nutrition powerhouse and insert mango nutritional messaging into relevant movements and conversations by citing research-backed health benefits and leveraging credible retail dietitian partners as spokespeople. In 2020, preventative health became more important than ever to consumers, so highlighting the Vitamin C nutritional message was crucial.

- Garnered 4.1 million total program impressions.
- Leveraged real-time conversations, providing target audiences with messaging when they were seeking it including in-house social media posts and blogs, child-focused efforts during back-to-school, and Vitamin C and immunity support.
- Worked with Plant Based Juniors to serve up meal inspiration for the whole family, including incorporating mangos into baby-led weaning practices.
- Year-long partnerships with registered dietitians helped to credibly share the mango nutrition story through pulses of media placements across broadcast, print, and online channels.
- Developed a new recipe highlighting Vitamin C-rich mangos during the height of the cold and flu season, generating 36,000 impressions.



SCAN HERE!



SCAN HERE!



## WEBSITE

- More people turned to online media for news, entertainment, and even shopping, so a conscious effort was placed to pivot to digital.
- Saw year over year growth on the website throughout the year, especially during the holiday season in Q4.
  - 2.3 million page views
  - 1.4 million site users
- US audience grew at a rate higher than the overall growth, with 1 million users or a 235% increase in this audience since the website relaunched in 2018.
- Blog saw impressive results with a 145% increase in page views.
- 24 new blogs added in 2020 to keep content fresh and relevant to consumers.

## SOCIAL MEDIA HIGHLIGHTS

- Added more than 5,000 new followers for a total community of more than 125,000 followers.
- 1.1 million engagements.
- 123 million impressions.
- 2.9 million video views.

Platform	Facebook	Instagram	Pinterest	YouTube
Followers	100,000+	17,000+	2,900+	4,600+
Engagements	613,000+	33,000+	464,000+	5,000+
Impressions	60.3 million	41.1 million	19.8 million	1.6 million
Video Views	1.3 million	54,000+	1.2 million	293,000+

## GEOFENCING CAMPAIGN

This type of targeted campaign, which uses demographic information, affinity categories, and geographic location, was a first for the NMB. The campaign included display ads, paid search ads, paid social ads, and video ads. Throughout the two-month campaign, we had 1.2 million impressions with more than 10,000 sessions driven to the NMB website. A fifth of those users viewed at least two pages, a campaign benchmark. Paid social, which includes Facebook and Pinterest, was the top performing channel with the highest volume of impressions, sessions, and engaged users. Paid search showed the strongest cost per engaged user.





# NMB STRATEGIC PRIORITY IV

## MARKET PENETRATION

Drive mango market penetration at retail and foodservice.

### RETAIL MARKETING

Delivering innovative promotional programs to key retail partners, drive the efforts to expand the mango category at retail, and keep mangos top of mind at stores and with consumers.

### PROGRAM HIGHLIGHTS

- 200 Custom Retail Programs
- 77 Retailers/Divisions
- 3 Fresh-Cut Programs

### DISPLAY BINS

Due to clean floor policies across much of retail, there was a reduced amount of display bins at retail stores.

A total of 6,200 bins distributed to 21 retailers and two suppliers.

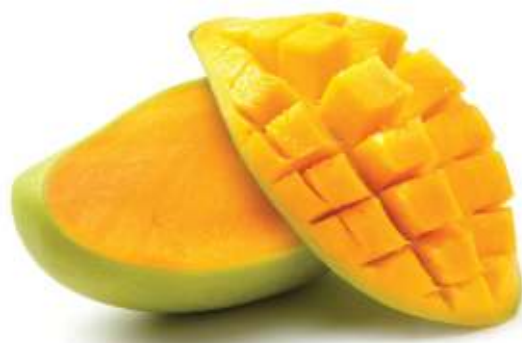
**Q1** = two retailers averaged a 49% lift in YOY volume

**Q2** = eight retailers averaged a 19% lift in YOY volume

**Q3** = seven retailers averaged a 56% lift in YOY volume

**Q4** = four retailers averaged a 93% lift in YOY volume

Introduced a new header to the mix, featuring a Vitamin C and nutrition message.





## CUSTOMIZED RETAIL PROGRAMS

- Traditional and digital ads, including social media.
- Fresh cut ads at both grocery and convenience.
- Retailers included NMB logo or ripening message in some of their ads.

## RETAIL ROUNDTABLE

Due to COVID-19, a virtual meeting was hosted in October. Retailers were encouraged to share their key takeaways from COVID-19 and how they adapted. A total of twenty six attendees representing eight different retailers participated.

## RETAIL DIETITIAN COMMUNITY

The NMB continued strengthening its collaboration with the retail dietitian (RD) community. Since in-store demos were not able to occur due to COVID-19, many retailers and retail dietitians (RDs) took to digital and social platforms to continue to share nutrition information and tips for health meal planning. The NMB supplied RDs with the RD Toolkit with multiple resources and downloadable assets to create Facebook Live demos, as well as public service demos on local TV.

## SUPPLY CHAIN MANAGEMENT

The NMB's commitment to quality mangos throughout the supply chain forms strong partnerships with industry stakeholders. The NMB engaged with multiple retailers, distributors, processors and suppliers to execute the logistical analysis and training at distribution centers for the Ripe and Ready to Eat Mango Program.

- 30 retailers have a Ripe and Ready to Eat Mango Program.
- More than 12,000 stores are offering ripe and ready to eat
- 23 processors/distributors influenced
- Seven suppliers have mango ripening protocols in place.

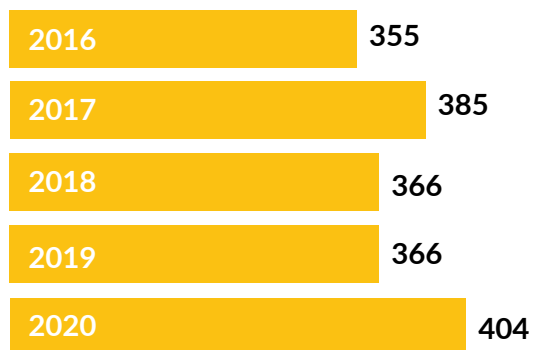
## SUPER FRUIT SUPER HEROS

Every year, the NMB presents the Mango Retailers of the Year award to a retailer who goes above and beyond to support the mango industry. In 2020, the NMB recognized the entire industry and our more than 100 retail partners for their efforts and support through the pandemic. Our gratitude extends to all aspects of retail, from industry leadership, to front-line staff, to warehouse workers and everyone in between. We have always valued our retail partnerships and this year, more than ever, we wanted to say thank you to the entire retail industry for their support of the mango industry and of local communities as well.



## 2020 MANGO PERFORMANCE AT RETAIL

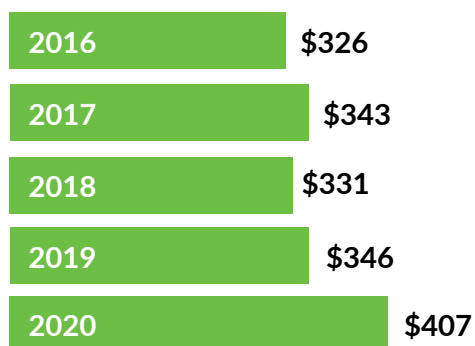
### Whole Mango Annual Volume in Millions



MANGO VOLUME HIGHEST EVER AT

404 MM

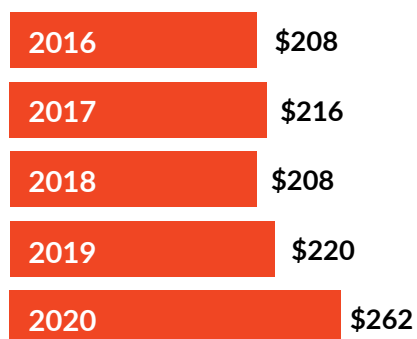
### Whole Mango Annual Dollars in Millions



MANGO DOLLARS HIGHEST EVER AT

\$407 MM

### Whole Mango Dollar Velocity (Dollars per store per week)

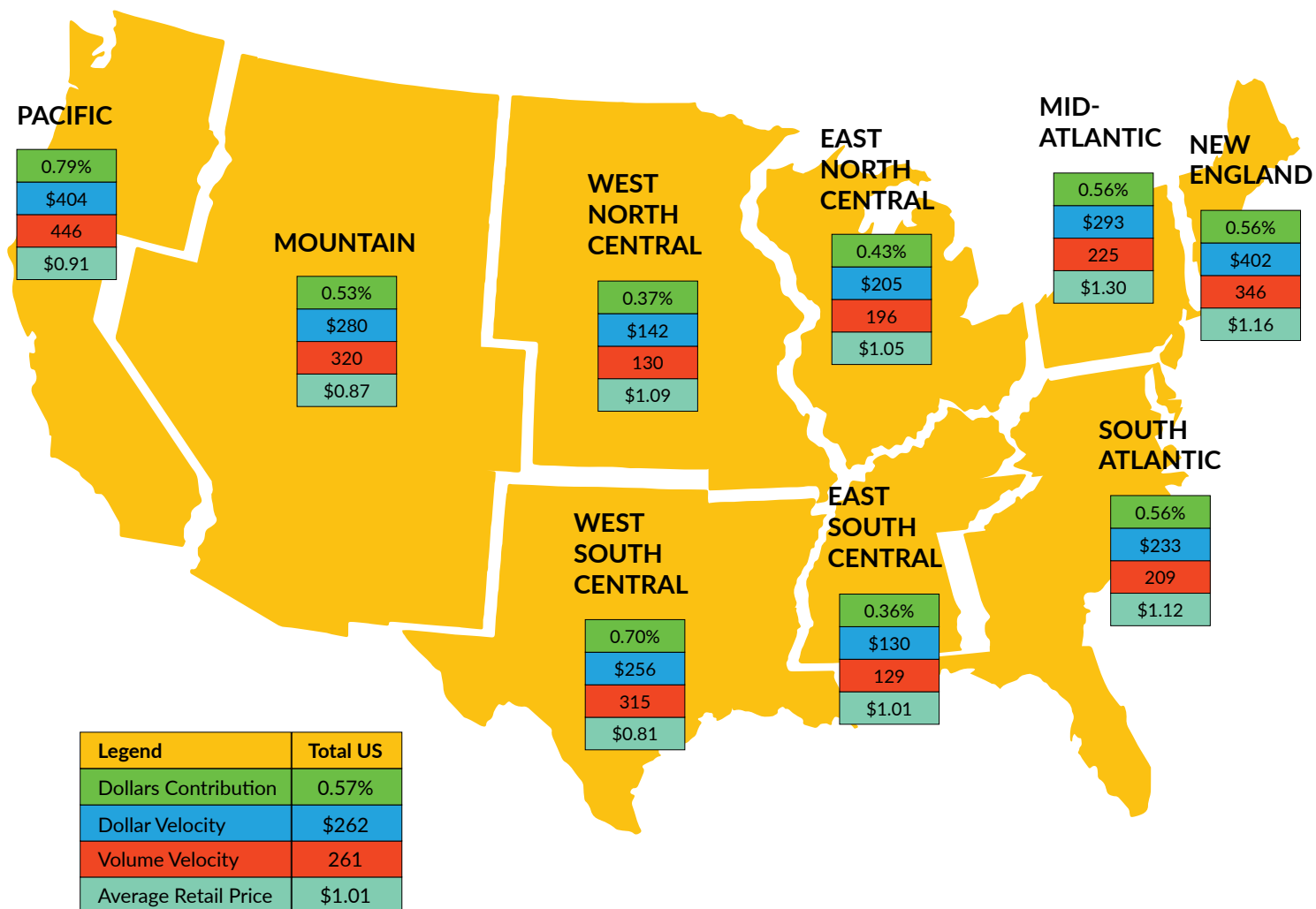


MANGO DOLLAR VELOCITY HIGHEST EVER AT

\$262

Sources: Nielsen Answers on Demand – YE 2020-201; Total US xAOC

## 2020 PERFORMANCE BY REGION



Sources: Nielsen Answers on Demand (52 weeks ending 12/26/2020) Total US xAOC



# 2020 FOODSERVICE MARKETING

**Broaden operator and distributor usage of mango in foodservice by increasing awareness and education of mango versatility, nutrition, seasonality, supply chain availability, functionality and formats.**

## FOODSERVICE PROGRAM HIGHLIGHTS

- Reached decision makers and influencers from approximately 400 commercial and non-commercial foodservice brands with more than 100,000 dining locations across the U.S.
- Added more than 20 culinary-inspired recipes to the National Mango Board catalog along with 13 new demo videos. These recipes also provided additional content for the different marketing verticals for future outreach and placement efforts.
- Expanded digital media efforts to reach operators and chefs through channels including Instagram Live and partnering with culinary communities.
- Earned and paid media placements combined reached nearly 20 million impressions, a 33% increase in impressions YOY.

## SUPPLY CHAIN HIGHLIGHTS

- Ongoing mango fresh cut programs continued throughout the year. Heightened awareness of the health benefits of mango coupled with limiting labor initiatives helped the mango fresh cut category grow in 2020.
- Processor centered Ripe & Ready training continued in 2020. Virtual training, exploration of new technologies and machinery options were investigated to help increase shelf-life stability and overall quality of fresh cut mango.
- Alliance with, and expansion of, major distributor mango training programs were targeted and discussions for future post COVID growth planned.



## COLLABORATIONS AND PARTNERSHIPS

### Culinary Institute of America

- Marketed five recipes and videos in the first quarter with dishes ranging from poke to smoothies to green mango noodles.
- Content was featured on the Culinary Institute of America website, foodservice e-newsletters and social media channels.
- Overall, the campaign garnered more than 310,000 impressions among working chefs.

### Kitchen Collaborative

- Partnered with five talented chefs from high-volume chains including Wawa and TGI Friday's to develop savory fresh mango recipes.
- Recipes were featured in Flavor & The Menu print magazine, website, sponsored website, and e-newsletter ads.
- Overall, campaign garnered 225,000 impressions.

### Chef's Roll

- Developed four deliciously innovative recipes, along with video content.
- Content was featured on the Chef's Roll website and social media channels throughout December as well as through in-house social media ads targeted to the professional culinary audience.
- Overall, the campaign garnered 5 million impressions.

### 7-Eleven Fall Promotion

- **Goal:** To increase store participation around mangos and drive unit growth for the category, while improving the customers' eating experience throughout 7-Eleven's 8,000-unit enterprise.
- The promotion was extraordinarily successful with 7-Eleven increasing their operators' mango awareness and in-stock conditions substantially.
- The NMB also worked with 7-Eleven's fresh cut mango suppliers and processors to support their emphasis on maintaining the highest level of mango quality.
- Testing mangos with Tajin added to the mango offering also proved highly successful.



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## CULINARY EDUCATION

- 186 working chefs from restaurant chains, hotels, schools, universities, healthcare, military, business cafeterias and culinary school instructors completed the curriculum to learn about fresh mangos, as well as the whys and ways to incorporate them on menus. Upon completion they earned 8.5 continuing education hours from the American Culinary Federation. Education to chefs remains key for the growth of the mango category on menus.
- Mango Bites, our foodservice newsletter, was delivered to a targeted audience in culinary, marketing, and the supply chain on a quarterly basis to over 1,800 subscribers providing timely mango messaging.

## RESEARCH

### Datassential

- Foodservice sees positive menu growth.
- Mangos currently sit at 40% of menu penetration in the U.S. after steady, sustainable growth.
- Mangos are predicted to grow +10% and outperform 96% of all other foods, beverages, and ingredients over the next four years.<sup>4</sup>

### Mango Category Sizing

Gained a better understanding of fresh and frozen mango volume in the foodservice channel to set benchmarks that help drive marketing strategies for growth of fresh mango.

### Frozen Mango Market Assessment

The Frozen Mango Market Assessment provided insight about how mango is used as an ingredient in the U.S. The study covered multiple product categories by interviewing importers, buyers and suppliers of frozen mango formats. Food manufacturers and processors who purchase those formats also provided information on usage, demand and market trends for frozen mangos as well other formats such as dried, purees, juice concentrates and other ingredient solutions. Frozen mango is also being used to produce freeze-dried and micro-dried mango pieces for use as a food ingredient and powdered for use in food and beauty products. Mango is highly regarded for its flavor, healthy “halo” and clean label status. Use of frozen mango as an ingredient solution has shown steady demand across all consumer product categories, the proof being a 21% increase in volume imported from 2019 to 2020. More than 350 new mango-containing products were introduced in the USA in 2020 according to Mintel Global New Product Database (GNPD). This is a 180% increase since 2005. Overall, the Assessment confirmed that consumer demand for mangos continues to grow, with the positive perception of this tropical fruit increasing the overall value of mangos.

Statistic source: US Customs, Mintel Global New Product Database (GNPD Search: key words: “mango or mangoes” used in ingredient statements).

## TRADE SHOWS

- Changing landscape with trade shows, as many were either canceled or moved to virtual due to the pandemic.
- The team attended one in-person show, Menu Directions, and three virtual shows: PMA Foodservice, International Foodservice Editorial Council, and Flavor Experience.
  - Connections were made with culinary, marketing and supply chain decision makers.



<sup>4</sup> Beerup, T., Hernandez, J., Kostyo, M., & Serna, A. (2020, June 30). Evolving Your Mango Strategy - What You Need to Know [Webinar]. National Mango Board. <https://www.mango.org/professionals/foodservice/evolving-your-mango-strategy-what-you-need-to-know/>

# NMB STRATEGIC PRIORITY V

## INDUSTRY SERVICE

Improve value-add and industry satisfaction for the mango industry.

### INDUSTRY EVENTS

The main objectives of NMB industry events are to cultivate, connect, and engage with industry members, to increase awareness of usage tools and resources, to keep industry members informed about the NMB and its activities, and to present updates and results on research projects.

Due to COVID-19, NMB staff travel was halted resulting in the cancellation of scheduled visits and workshops. Instead, the team pivoted to conducting updates via virtual meetings and webinars. The NMB presented virtual updates to the foreign mango organizations of Ecuador, Peru, and Guatemala. In addition, the NMB participated in the RedAgricola International Conference in collaboration with other researchers. The NMB presented three webinars focusing on the foodservice industry, the benefits of the 5-down box, and the marketing strategies related to the pandemic. More than 4,500 industry members attended at least one of these webinars. A post-webinar survey was distributed to assess participant's sentiment, with 95 percent of respondents indicating they were either very satisfied or satisfied, and 96 percent of respondents indicating they were open to more of these types of events in the future.

The NMB also participated in the United Fresh Association virtual show, where NMB staff presented across several live sessions including: mango on the menu, mango's nutrition story, research points to grow fresh mango sales, building distributor sales of fresh mango and fresh-cut mango processors. More than 180 industry members visited the NMB page during this show.

### CONTINUANCE REFERENDUM

The continuance referendum took place from Sept. 21 - Oct. 9, 2020. First handlers and importers approved continuing the NMB federal research and promotion program for fresh mango, but voted to remove the provisions of frozen mango as a covered commodity under the program. The results will allow the NMB to continue its strategies with the fresh mango industry to increase mango consumption in the U.S. through its marketing, research, and industry relations programs. The next continuance referendum will be held in 2025.

### INDUSTRY COMMUNICATIONS HIGHLIGHTS

Platform	Facebook	LinkedIn
Followers/Fans	1,000+	2,900+
Engagements	2,800+	2,700+
Impressions	115,000+	50,000+

Mango Food Safety Website ([www.mangofoodsafety.org](http://www.mangofoodsafety.org))

Apps downloaded

- 2020 Google Store = 103
  - Since 2016, Google App Store downloads = 999
- 2020 Apple App Store = 285
  - Since 2016, Apple App Store downloads = 77,457

Crop Report Subscribers

- 4,100+

Mango Connection

- Newsletter format was revamped for a clean, mobile-responsive design.
- English subscribers: 2,500+
- Spanish subscribers: 2,100+



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[National Mango Board](https://www.linkedin.com/company/national-mango-board)

The National Mango Board (NMB) is an agricultural research and promotion program authorized by the Commodity Promotion, Research, and Information Act of 1996 (7 U.S.C. 7411-7425), and the Mango Promotion, Research, and Information Order, issued in 2004 (7 CFR 1206). The NMB is an instrumentality of the U.S. Department of Agriculture and receives oversight from the Agricultural Marketing Service, Specialty Crops Program, Promotion and Economics Division.

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