

Monthly dashboard – Mango Sept-2025





#### Mango crop calendar of major producing countries

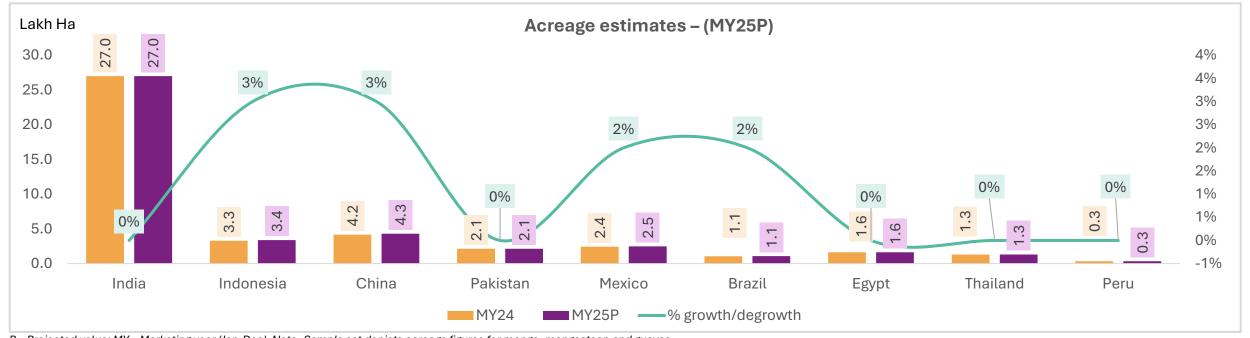
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
India												
Indonesia												
China												
Pakistan												
Mexico												
Brazil												
Peru												
Egypt												
Thailand												

Lean season	Peak season	

- The mango crop calendar for major producing countries highlights that the peak harvesting season for countries like India, China, Pakistan, Mexico and Thailand ranges between April and September
- Indonesia, Brazil and Peru stands out with a unique peak season ranging from August to February, which is off-season for others, providing a market advantage.
- The key varieties of mango traded globally are Atalufo, Tommy Atkins, Keitt from **Mexico and Brazil**, Nam Dok Mai from **Thailand**, Sindhri, Chaunsa from **Pakistan** and Alphonso, Kesar, Dasheri, Langra from **India**
- India's Dasheri variety from Uttar Pradesh has found its new market in Dubai wherein mangoes were sent via direct connectivity in June 2025.

Note: Mangoes are harvested throughout year globally with crop calendar varies across the countries. Marketing year is considered as Jan-Dec

#### Acreage estimates of major producing countries

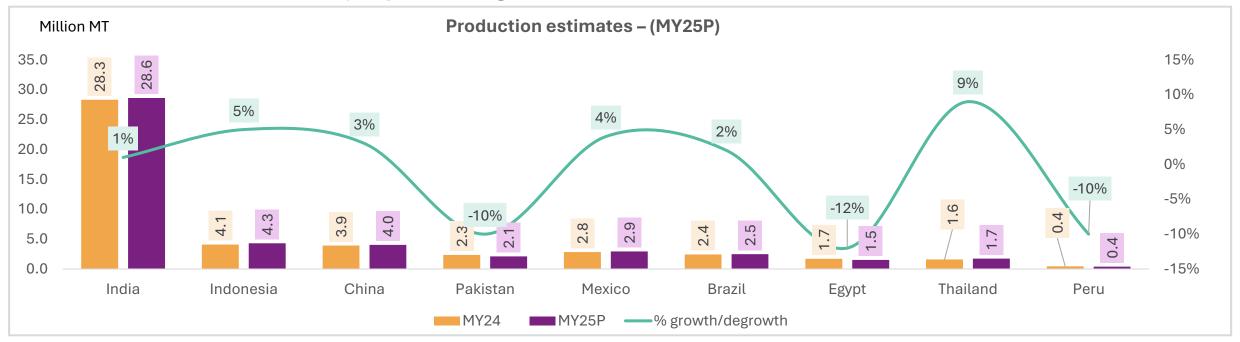


P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts acreage figures for mango, mangosteen and guavas

- The countries in the sample set **contributes to ~70% of global area**. For MY25P, global acreage is set to rise moderately by 0-1% YoY, led by Indonesia, China, Mexico and Brazil while other countries are likely to remain stable.
- Acreage for mango in Indonesia is expected to improve on year backed by rising export momentum at a CAGR of 15% (MY19-MY24) and rising household share in mango consumption, now at 4.88%<sup>1.</sup>
- China's, strong domestic price realizations in MY2024 is expected to have encouraged the area for MY25P, wherein the prices were 12% YoY higher (June-August).
- Brazil is projected to **expand area under mango in MY25**P driven by strong exports in 2024 wherein mango topped the fruit exports in the country.
- For Mexico, rising restrictions in the US market—its key destination accounting for nearly 87% of exports—are expected to prevent any considerable increase in planting in MY25 and continue weighing on production in the medium term.

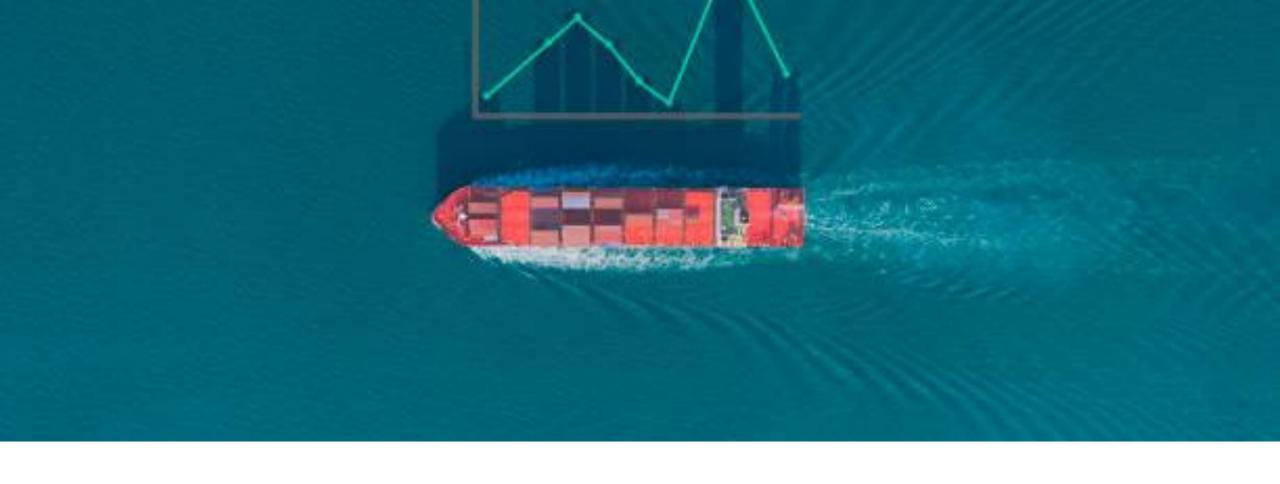
<sup>&</sup>lt;sup>1</sup> Source -Statistics of Horticulture, Indonesia

#### **Production estimates of major producing countries**



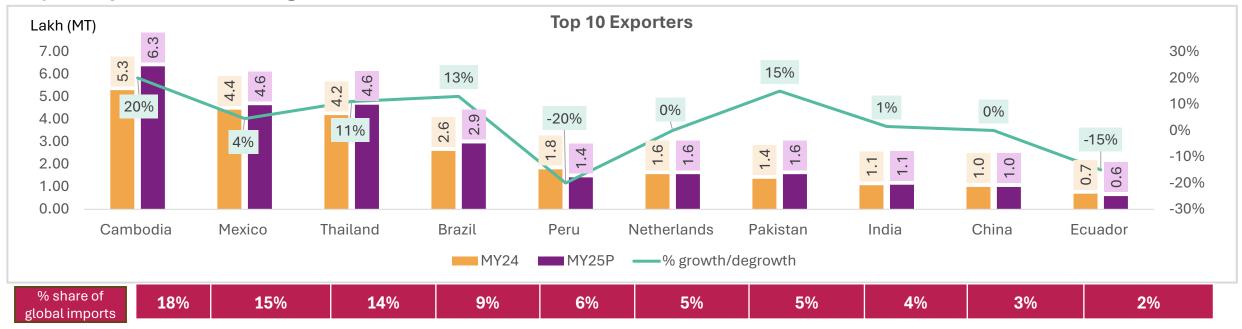
P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts production figures for mango, mangosteen and guavas

- The countries in the chart **contributes to ~75% of global production**. The production for MY25P is expected **to moderately improve by 0-1%** led by India, Indonesia, China, Brazil and Thailand while countries like Pakistan, Peru and Egypt is expected to witness downtrend in production.
- Mexico witnessed unusually heavy rainfall recorded in the south, affecting flowering and, therefore, production in MY25. Favorable weather conditions in Brazil wherein cooler temperatures have prompted floral induction is expected to boost production in the country.
- Growing commercial demand of Gedong Gincu, a premium mango variety from West Java as well as growing focus on fruit fly contamination is estimated to support production in Indonesia for MY25P.
- Pakistan production is also expected to hit this season due to irregular weather patterns ranging from heat waves and unusually heavy rains as well water scarcity situations.
- Mango production in Egypt is estimated to have witnessed 70-80% lower flowering due to intense summer heat and other weather stresses which is expected to impact production in MY25.
- India's production is estimated to improve in MY25P due to increased productivity specifically in southern states like Karnataka and Andhra Pradesh.



# **Export trends and price outlook**

#### **Major exporters of Mangoes**

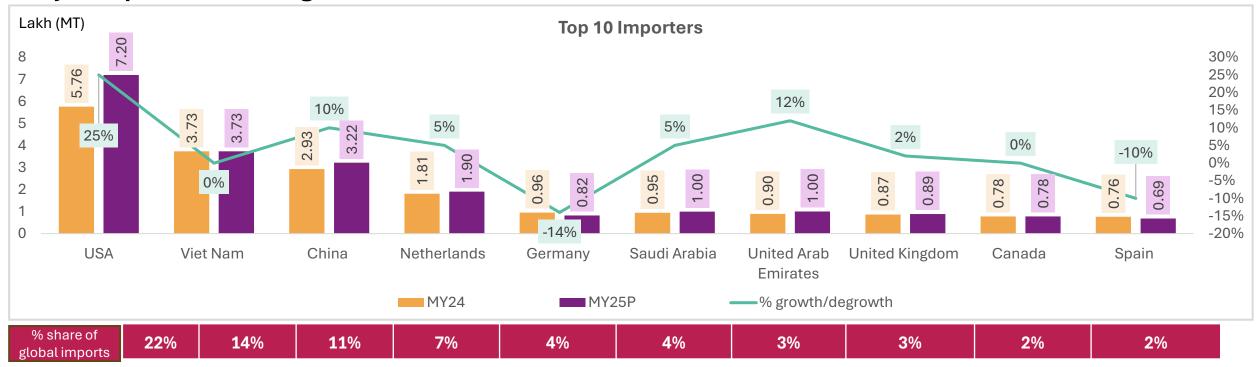


P – Projected value; MY – Marketing year (Jan-Dec), HS Code: 08450

- The countries above account for ~80% of global mango exports. Global mango exports in MY25P are projected to rise by around 8-9% year-on-year, primarily fueled by a significant increase in export volumes of Cambodia, Mexico, Thailand, Brazil and Pakistan.
- Cambodia recent agreement with Laos is expected to increase the sale of Cambodian mango products to other countries using Laos' high-speed rail infrastructure.

  Increased demand for Kent varieties from Mexico in the US markets is estimated to have increased exports momentum from the country.
- In **Mexico**, the mango season has just concluded with exports experiencing a slight increase compared to the previous year, and the next campaign is scheduled to commence in January 2026.
- In India, the season closed steadily, driven by strong demand for Alphonso and Kesar, with stable shipments to Canada, the UK, and the US.
- Despite US tariffs, **Brazil maintained a strong export momentum**, with exports up 18.3% YoY during January-August 2025,
- South Korea's decision to expand import quotas and reduce tariffs on tropical fruits, effectively eliminating the previous 30% import tariff on mangoes is expected to improve exports from Thailand.
- For Pakistan, demand for premium varieties such as Chaunsa and Anwar Ratol was strong in the Middle East and Europe. New markets in South Africa and Central Asia also showed promising demand.

#### **Major importers of Mangoes**



P – Projected value; MY – Marketing year (Jan-Dec), HS Code : 08450

- The countries in the chart **account for ~73% of global mango imports**. Mango imports grew at a range of ~6% in past decade, from MY15 to MY25P.
- The U.S. mango market continues to experience strong growth, driven by increased harvest volumes, particularly from Guatemala and Nicaragua. Demand for Mexican varieties Tommy Atkins and Atalufo also remains firm which constitutes of ~71% and ~37% of the shipments, respectively. Export volumes from Guatemala, Nicaragua and Mexico have remained YoY in 2025.
- Netherlands market is navigating the transition from the early Peruvian mangoes to that of Ivory Coast, wherein Ivory coast mangoes are slightly lower prices (USD 3 4 less per kilogram). However, the demand for Peru mangoes to still be firm there because of their quality.
- Indian exports are facing rising quality concerns for alphonso variety in key importing countries like middle east countries which is expected to impact the demand.

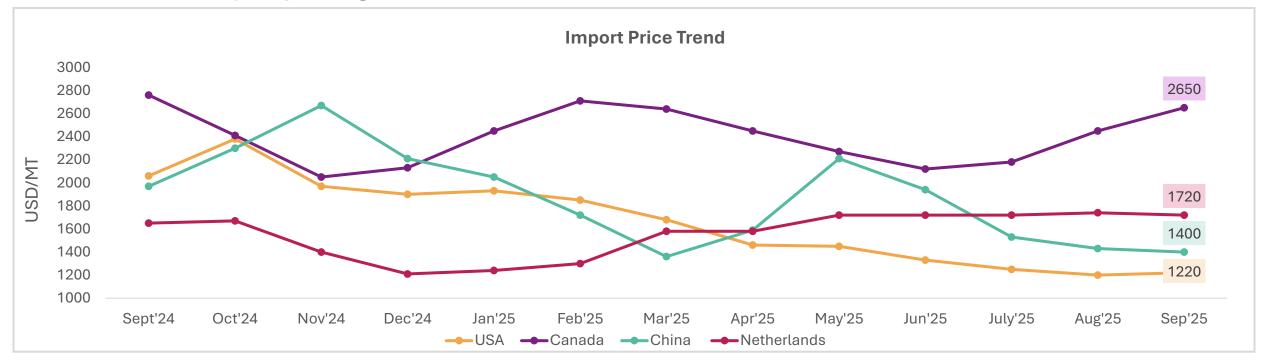
#### **Export prices forecast**



Price outlook for next quarter (OND)						
Countries	Sep'25 Price (USD/MT)	Sep'24 Price (USD/MT)	%age ch ange	Price direction	Average price range for OND (USD/MT)	
Brazil	1442	1430	1%	Bullish	1480-1520	
China	1202	1050	14%	Sideways	1160-1220	
Peru	3478	2180	60%	Bullish	3500-3800	

- Brazil, as an off-season supplier, is expected to see an uptrend in prices in the next quarter due to its dominance during mid-August to mid-November, with good quality and strong demand for US Atkins varieties supporting prices.
- China witnessed an uptick in prices in January '25 due to production and quality concerns surrounding Guifei mangoes, with prices 30-35% lower than early season prices, but growing demand from countries like Vietnam is expected to keep prices firm.
- **Peru's** harvest is set to begin in November, with domestic production expected to be impacted by delayed flowering, **keeping prices firm**, and low rainfall may limit fruit development, with peak volumes expected in mid-December through January.
- India's mango export realization for pulp has declined at a CAGR of -6% in the past five years due to lower product quality, while fresh mangoes have shifted towards cheaper varieties like Kesar, which are 40-45% cheaper than Alphonso, expected to keep export prices tamed, with unseasonal rainfall raising quality concerns and keeping prices lower on year.

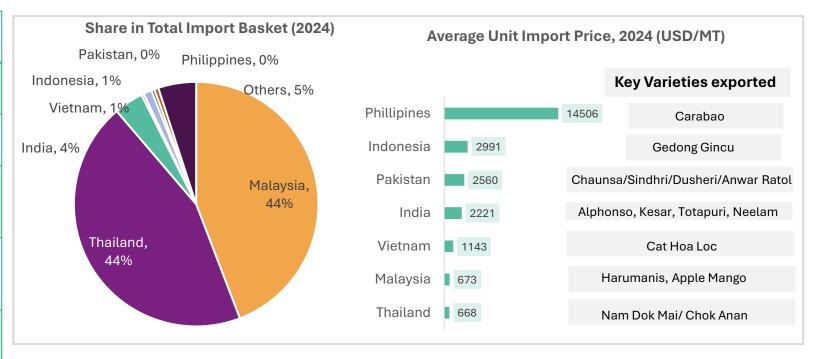
#### **Price trends of key importing nations**



- The overall supply of mangoes to the US from Mexico is comparable to the same period last year, with smaller volumes arriving from other countries, and key varieties including Tommy Atkins, Ataulfo, Keitt, and Kent.
- The **US may face a supply gap from September to November** due to Mexico's declining volumes and Peru's delayed harvest, which could lead to **higher import prices**, especially if water storage issues occur in Peru.
- Importers are hedging against the anticipated dip in Peru's volumes, looking to Colombia and Brazil to fill supply gaps, but these countries may not be
  able to fully replace Peruvian volumes.
- Canada is experiencing firm prices due to rising demand for Ataulfo and red mangoes, with supplies coming from Mexico, India, Thailand, and Colombia, supporting prices in the next quarter.
- The Netherlands is witnessing price pressure due to overlapping supplies from Brazil, Spain, and delayed shipments from Peru, leading to a surplus in the market.

## **Indian Export Opportunity in Singapore Market**

Imported Volume (2024)	28,000 tonnes			
Key Competitive Exporters	Thailand, Malaysia, Indonesia and Vietnam			
CAGR growth (MY19-MY24)	~2%			
India's Penetration (In the country's import basket)	~4%			
India's exported volume to the country (2024)	1,172 tonnes			
Key Imported Varieties	Apple mango, Harunamis mango, Honey mango, Alphonso			
Key Indian Exported Varieties	Alphonso, Chaunsa, Neelam, Totapuri, Langda			
Average Singapore Import Price (2024)	922 USD/MT			
Average Indian Export Price (2024)	2221 USD/MT			
Key Value-Added Products Imported	Mango pickle, Yoghurt, Frozen Diced Mangoes, Canned Puree			



- **Thailand** and **Malaysia** dominates in Singapore market due to low-cost bulk exports mainly for processed demand.
- Despite small penetration, high import price for Indian mangoes indicates strong presence in premium niche like alphonso which also provides a headroom, for scaling within mid price segments.
- Policy context also remains favorable through the **Comprehensive Economic Cooperation Agreement** (**CECA**) and Singapore follows a zero-tariff regime for fruit imports.
- India currently remains **non-price competitive** due to its focus on premium varieties like Alphonso.
- To enhance its presence in the Singapore market, India should diversify into mid-range varieties to align with prevailing price levels and gain a competitive edge over Thailand and Malaysia.
- Singapore offers a logistics advantage for India, with **transit times by sea is** 4–6 days **or air** <1 day
- Supply quality consistency and reliability remains a key challenge
- By leveraging CECA facilitation, India can build on premium fresh mango presence in supermarkets and ethnic stores through Alphonso and Kesar, while also pushing processed formats (pulp, frozen, dried) to ensure year-round visibility and stable market presence.

Source: ITC Trademap, CRISIL Intelligence

# **Thank You**

### **Methodology for Price Forecasting**

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

#### **Data Collection**



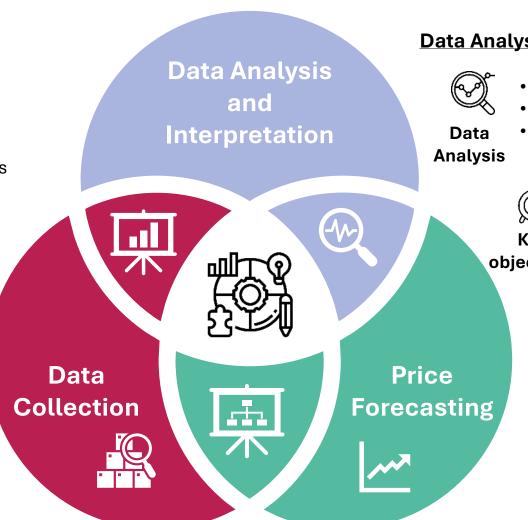
Global agricultural databases (USDA, FAO, etc.)

Country-wise statistics from official agriculture departments

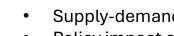
Industry publications and research reports



- Detailed review of Production policies & trade barriers for each country
- Data from government websites & official publications



#### **Data Analysis and Interpretation**



- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations



objectives

- Production trends
- Trade dynamics
- Policy implications

#### **Price Forecasting**

- Historical Trend & Seasonality
- Macro-Economic & Trade Variables Integration of commodity fundamentals to forecast future price ranges.

Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.