

Monthly dashboard – Mango Jan-2026





***Acreage and
production
trends***

Mango crop calendar of major producing countries

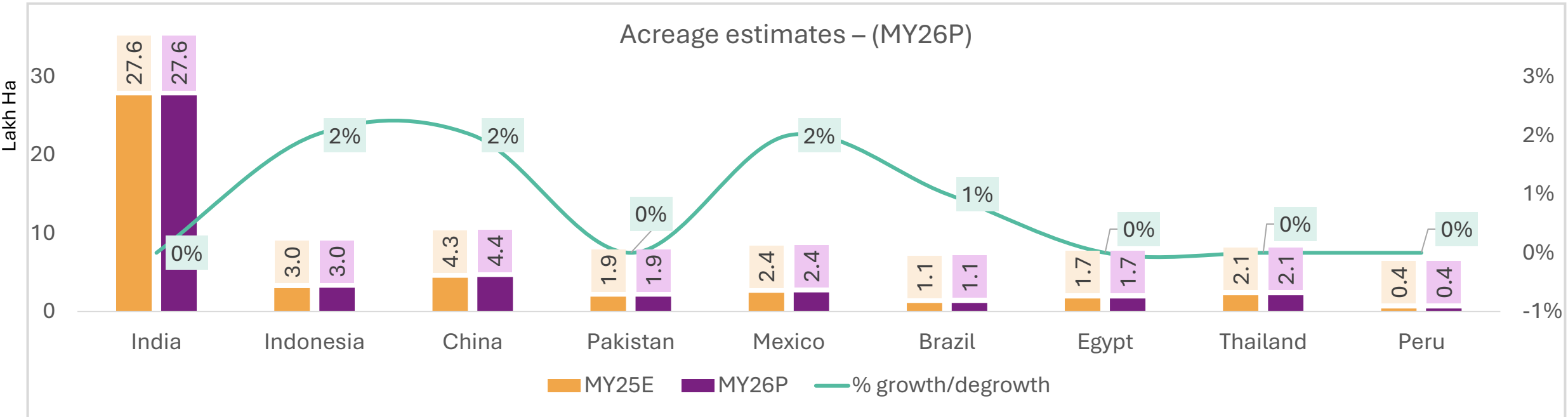
Countries	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
India			Lean	Peak	Peak	Peak	Lean	Lean				
Indonesia						Lean	Lean	Peak	Peak	Peak	Peak	Lean
China						Lean	Peak	Peak	Lean	Lean		
Pakistan					Lean	Peak	Peak	Peak	Lean			
Mexico			Lean	Peak	Peak	Peak	Lean	Lean	Lean			
Brazil	Lean							Peak	Peak	Peak	Peak	Peak
Peru	Peak	Peak	Lean								Lean	Peak
Egypt						Peak	Peak	Peak	Peak			
Thailand			Lean	Peak	Peak	Lean						

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, Dasherri, Langra from **India**
- India's Dasherri 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

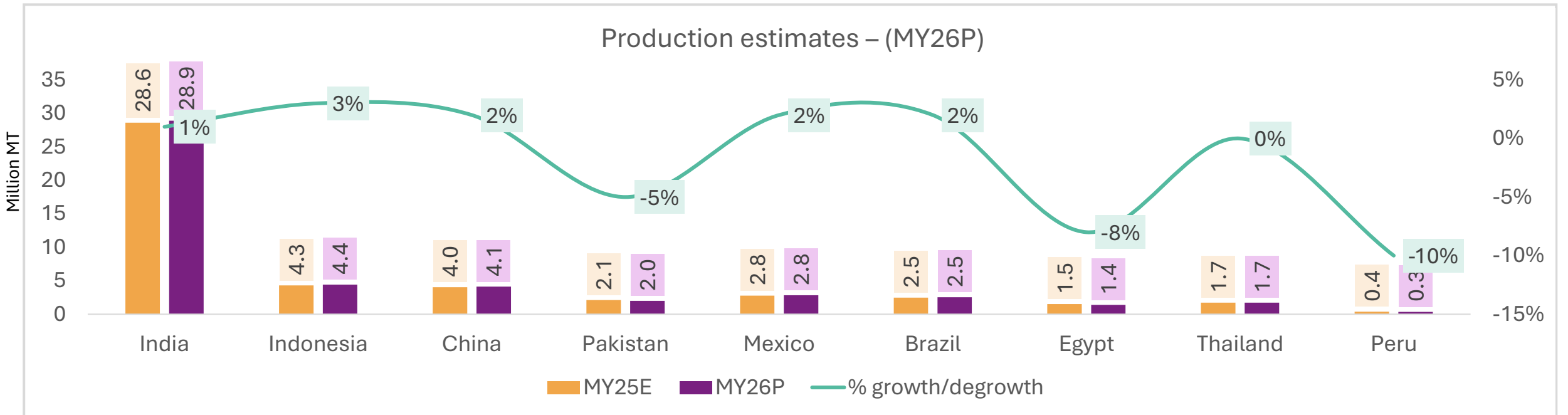


P – Projected value; MY – Marketing year (Jan-Dec) Source: FAO Stat; Note- Data depicts acreage figures for mango, mangosteen and guavas

- The countries in the sample set **contributes to ~70% of global area**. For MY26P, 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-MY25) and rising household share in mango consumption, now at ~5%¹.
- China’s strong domestic price realizations in MY2025 have supported area expectations for MY26P. While **scope for outright land expansion remains limited, higher intensification and orchard renewal** are still expected to be key drivers in MY26.
- Brazil is projected to **expand area under mango in MY26P** driven by strong exports in 2025 wherein mango topped the fruit exports in the country.
- **Mexico’s growing U.S. market restrictions**—still its primary outlet, absorbing roughly **87 % of its exports**—are likely to block any meaningful expansion of planting in **MY2026** and will keep pressure on output over the medium term.

¹ Source -Statistics of Horticulture, Indonesia

Production estimates of major producing countries



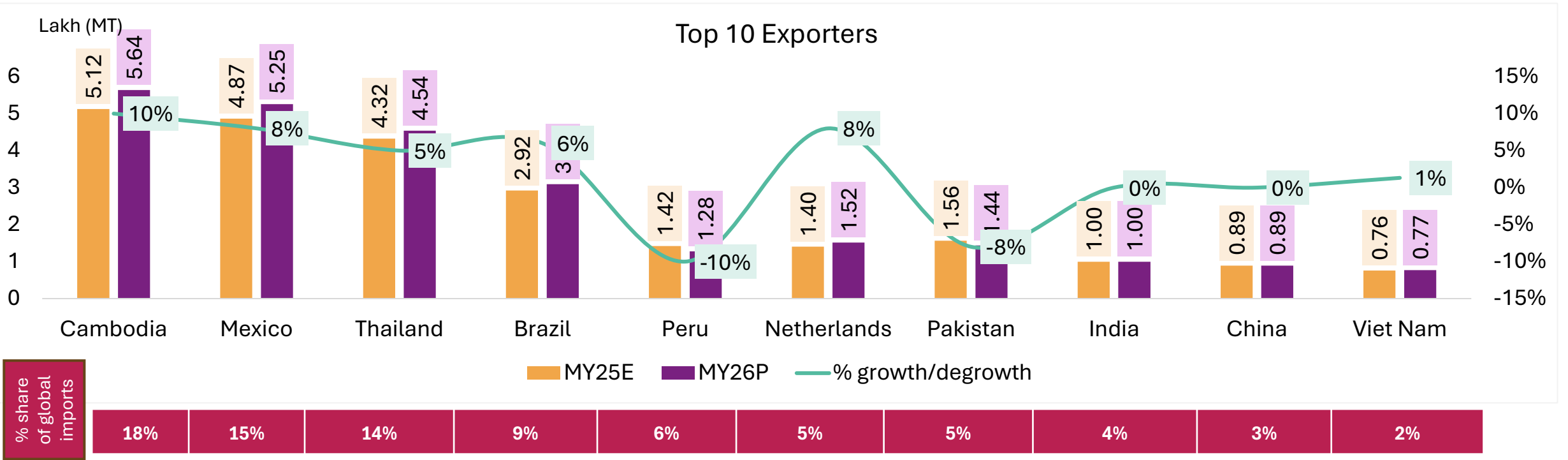
P – Projected value; MY – Marketing year (Jan-Dec) Source: FAO Stat; Note- Data depicts production figures for mango, mangosteen and guavas

- The countries in the chart **contributes to ~75% of global production**. The production for MY26P is expected to **moderately improve by 0-1%** led by India, Indonesia, China, Brazil and Mexico while countries like Pakistan, Peru and Egypt is expected to witness downtrend in production.
- **Mexico's** mango production in **MY26P** is expected to **inch-up** supported by **strong orchard management**, though **excess rainfall** in **Chiapas**, and **Oaxaca** has capped the upside potential, limiting **growth to ~2%**.
- 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 MY26P**.
- **Peru's** mango output is **expected to decline ~10% YoY**, derived by **delayed flowering** and **phenological disruptions** in key producing regions like **Piura** and **Lambayeque**, which have constrained fruit set and are expected to limit exportable surplus compared to last season.
- **Pakistan production had 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 expected to remain **under pressure** in **MY26P**, driven by **heat stress** and **poor flowering** in key belts like **Ismailia**, **Sharqia** and **Nubariya**, impacting commercial varieties like **Keitt**, **Kent**, and **Naomi**.
- **India's production is estimated to have improve in MY26P** due to increased productivity specifically in southern states like Karnataka and Andhra Pradesh.



Export trends and price outlook

Major exporters of Mangoes

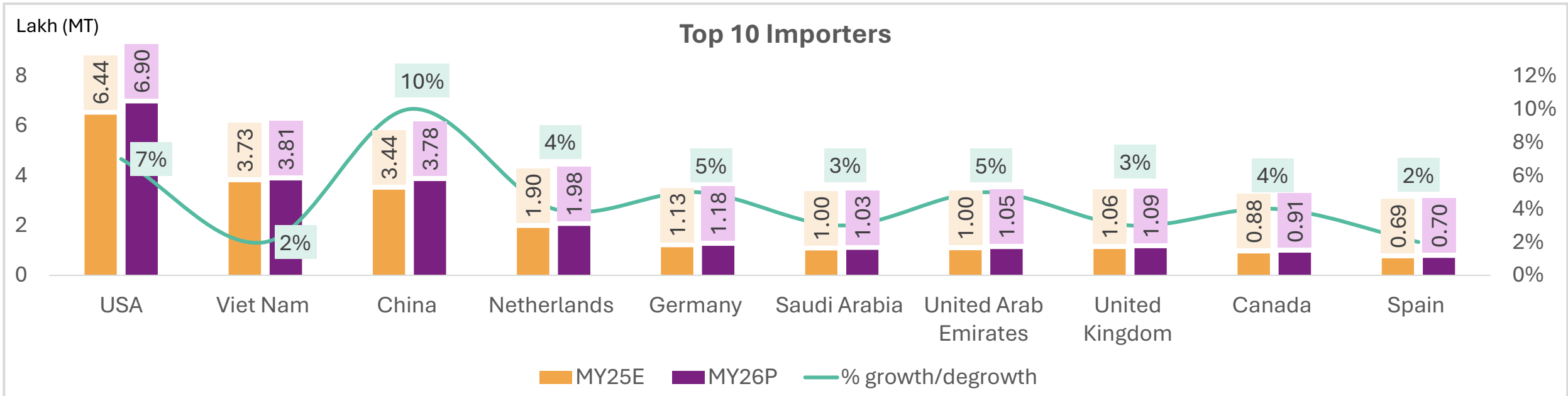


P – Projected value; MY – Marketing year (Jan-Dec), Source: ITC Trade Map HS Code : 080450 Fresh and dried guavas, mango, and mangosteens

- The countries above account for **~80% of global mango exports**. Global mango exports in MY26P 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 Netherlands.
- Cambodia’s mango exports are expected to rise in MY2026, supported by expanding commercial acreage, stronger China-focused trade under RCEP and CCFTA, and improved cross-border logistics that continue to structurally lift exportable surplus.
- **Mexico’s 2026** mango season is off to a robust start, with early **exports up** nearly **8% year-over-year**. This signals **improved North American supply** as sourcing shifts from South America.
- **Pakistan is tightening phytosanitary standards** to access premium markets like **the EU** and **UK**, while maintaining **strong Gulf exports**. However, **exports** are expected to **go down 8% year-on-year** due to **quality-related rejections**.
- **Peru’s 2026 mango** season is being **challenged** by **heavy rainfall** in key northern regions like **Piura** and **Motupe**, leading to **lower quality fruit**, **increased disease pressure** such as **anthracnose**, and a **drop in exportable supply**. As a result, exporters are adjusting their shipping strategies, even as U.S. exports persist.

Source: [Global mango market shifts as Mexico wraps up record-breaking season - FreshFruitPortal.com](#), [Pakistan tightening the phytosanitary standards](#)

Major importers of Mangoes

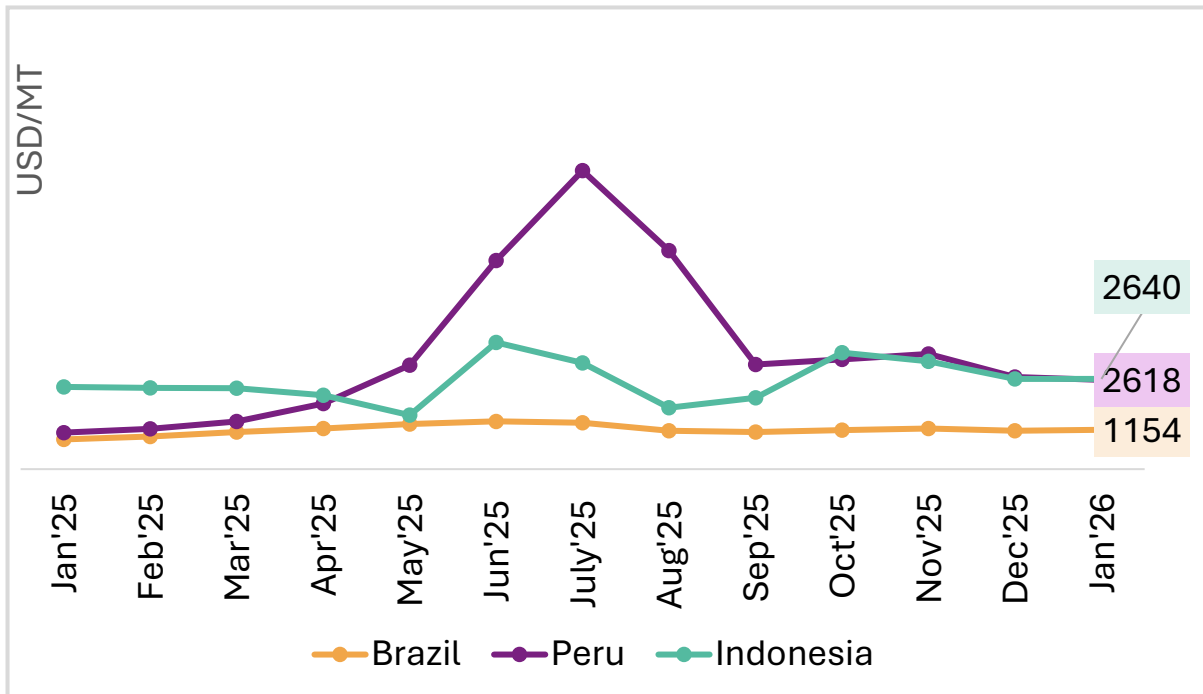


% share of global imports	24%	14%	12%	8%	4%	4%	3%	3%	2%	2%
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P – Projected value; MY – Marketing year (Jan-Dec), Source: ITC Trade Map HS Code : 080450 Fresh and dried guavas, mango, and mangosteens

- 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 MY25E
- **U.S. mango imports** are expected to **increase** by about **7% in MY2026**, supported by **year-round demand, higher per-capita consumption (3.6–4.0 kg), strong retail promotions, improved supply** from **Mexico and Peru**, and **zero-tariff access** that lowers costs and boosts margins, despite ongoing compliance concerns.
- **Mango imports in China and UAE** are expected to **inch-up** as **rising health-conscious consumption, growing preference for fresh fruits, expanding urban populations, and strong retail penetration** continue to drive demand for nutrient-rich tropical fruits.
- **Germany’s mango imports** are projected to **increase marginally by ~5% in MY2026**, supported by **rising demand for exotic fruits, widespread supermarket availability, and reliable supply chains** through **European** hubs, ensuring continued growth in consumption.
- **Indian mango exports** especially pulp continue to gain traction in gulf markets, with rising institutional demand for Alphonso and Kesar Pulp in Saudi Arabia, UAE and Qatar. However fresh fruit demand has been partly constrained by quality variation and logistics related shelf-life issues.

Export prices forecast



Price outlook for next quarter (FMA)					
Countries	Jan'26 Price (USD/MT)	Jan'25 Price (USD/MT)	%age change	Price direction	Average price range for FMA (USD/MT)
Brazil	1,154	870	33%	Bullish	1,200-1,250
Peru	2,618	1,070	145%	Bullish	2,920-2,980
Indonesia	2,640	2,410	10%	Sideways	2,580-2,660

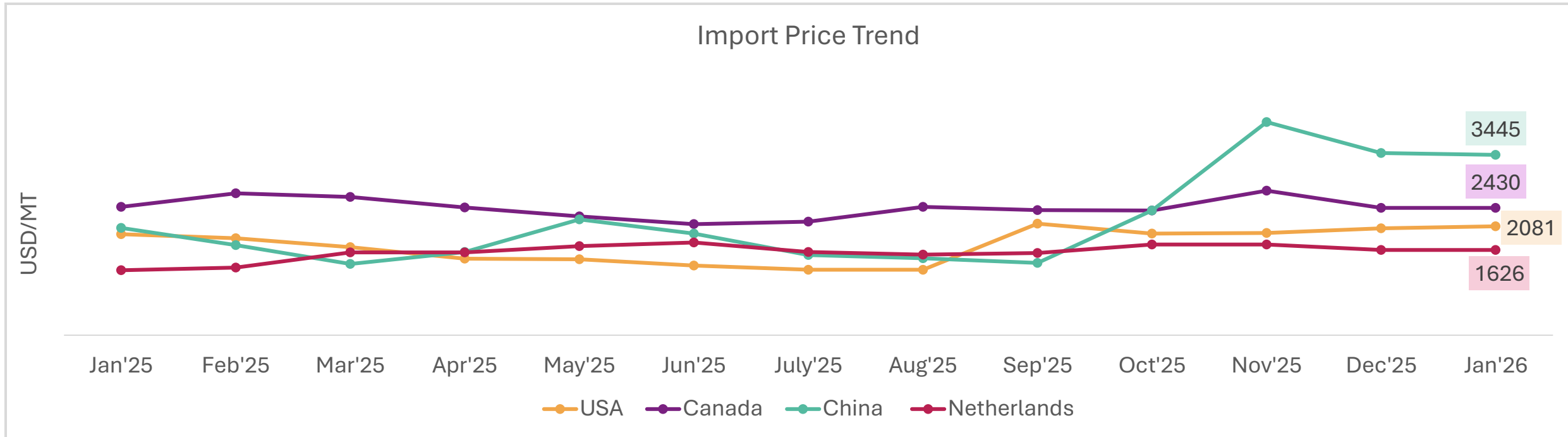
FMA – February, March, and April 2026

- **Brazil's early São Paulo Tommy Atkins harvest remains tight**, and with **minimal overlap** from **Peru**, **steady EU demand** is expected to keep mango export prices **stable to firm** from **February to April**, even as volumes decline.
- **Peru's export prices fell in January (USD 2699 to USD 2618)** due to **peak harvest oversupply**, but **tightening supply** and **weather-related losses in February** are likely to **stabilize or soften the prices** in the upcoming quarter.
- Leveraging the **Indonesia-Canada Comprehensive Economic Partnership Agreement**, **Indonesia's Ministry of Trade** is opening **new mango markets** in **Canada**, and the broadened market access plus diversified demand are set to keep **export prices firm-to-bullish** through **Jan-Mar** even though seasonal volumes remain moderate.

Source: ITC trade map , HS Code : 080450 Fresh and dried guavas, mango, and mangosteens

["December is failing to attract stronger mango demand"; MANGO/CEPEA: 2025/26 São Paulo harvest begins with prices above last year's levels - HF Brasil](#), [Indonesia aims to grow tropical fruit exports to Canada](#)

Price trends of key importing nations



- As **Mexico’s mango shipments decline** and **Peru’s harvest is delayed**—further strained by **impending water shortages**—the **U.S. supply chain is set to tighten**, potentially **driving up import prices**, particularly if **Peru’s irrigation challenges worsen**.
- 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’s mango market** relies on **overseas supply** during **winter**, with consistent demand for **Tommy Atkins, Kent, and Ataulfo varieties**. Modest import volumes and seasonal dependence on **Latin American** sources are likely to keep **prices firm** through **December - January**.
- **China’s mango import prices** jumped in **November 2025**, driven by **limited domestic supply, delayed southern harvests** (Jinhuang, Tainong, Guifei), and **robust off-season demand**. As **import arrivals increase**, **prices are expected to ease** in **December 2025–January 2026** but will likely stay above typical seasonal levels.

Source: ITC trade map; HS Code : 080450: Fresh dried guavas, mango, and mangosteens

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



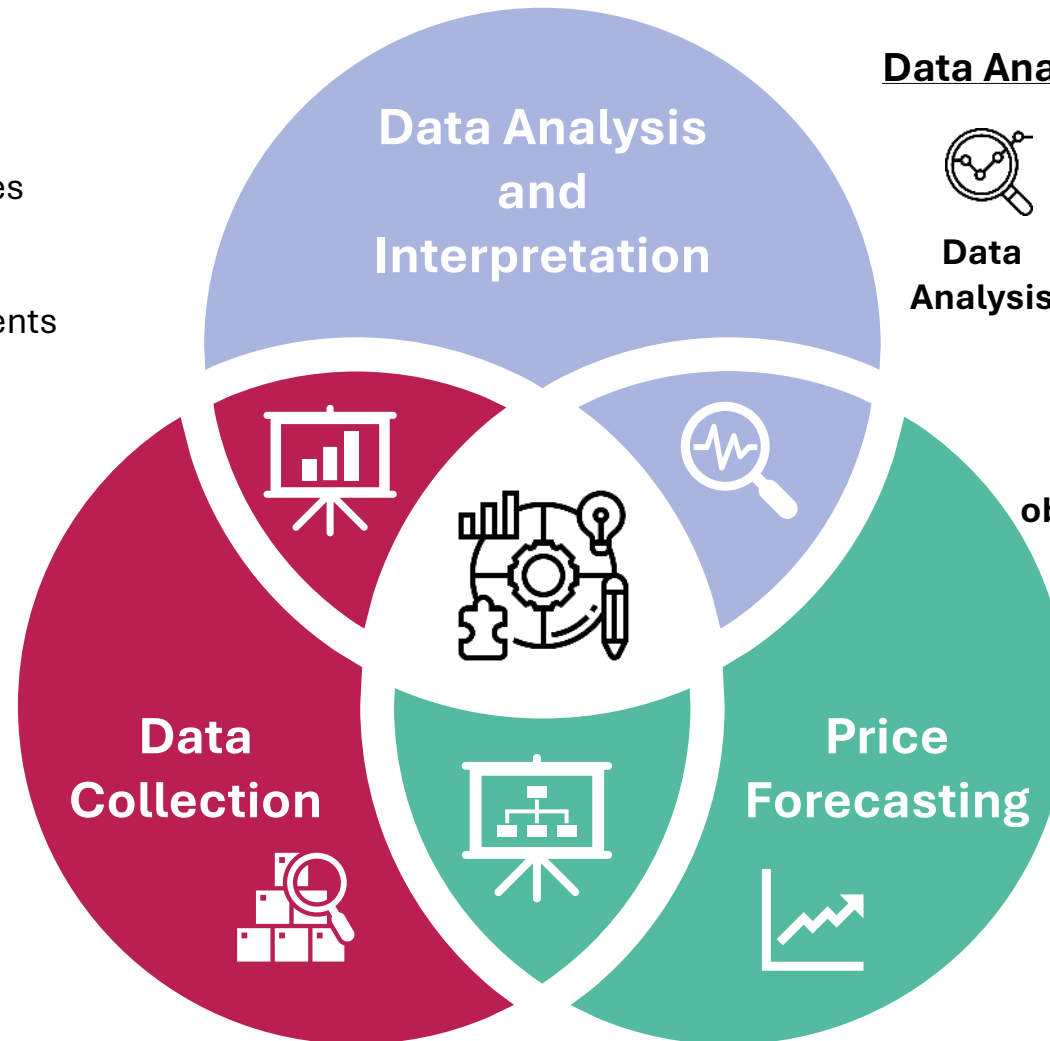
Sources

- Global agricultural databases (USDA, FAO, etc.)
- Country-wise statistics from official agriculture departments
- Industry publications and research reports



Policy Updates

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



Data Analysis and Interpretation



Data Analysis

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



Key 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.