

Monthly dashboard - Mango



Acreage and production trends



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												

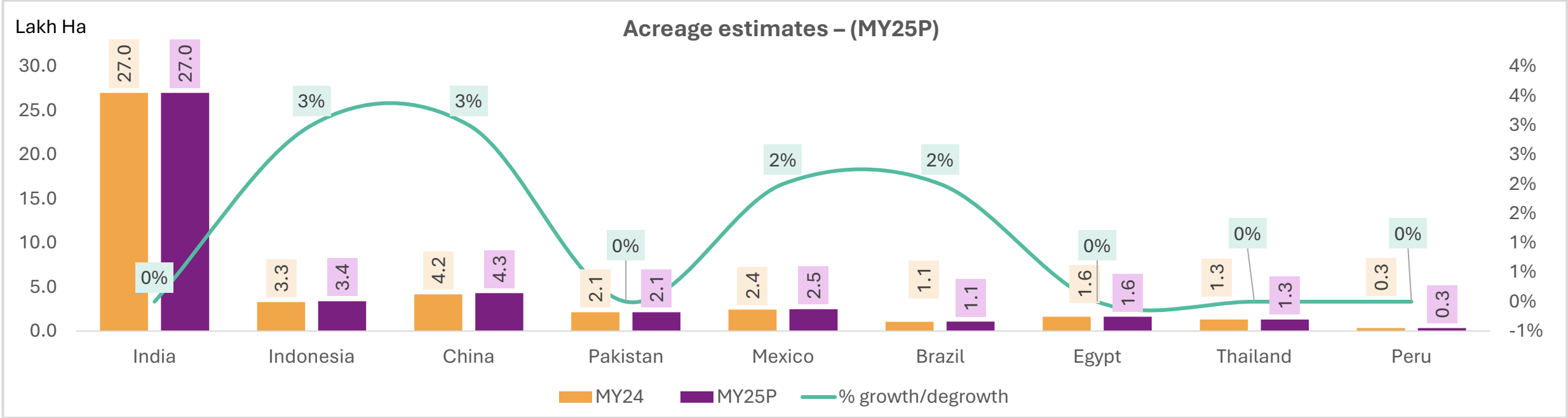
Lean season

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, 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

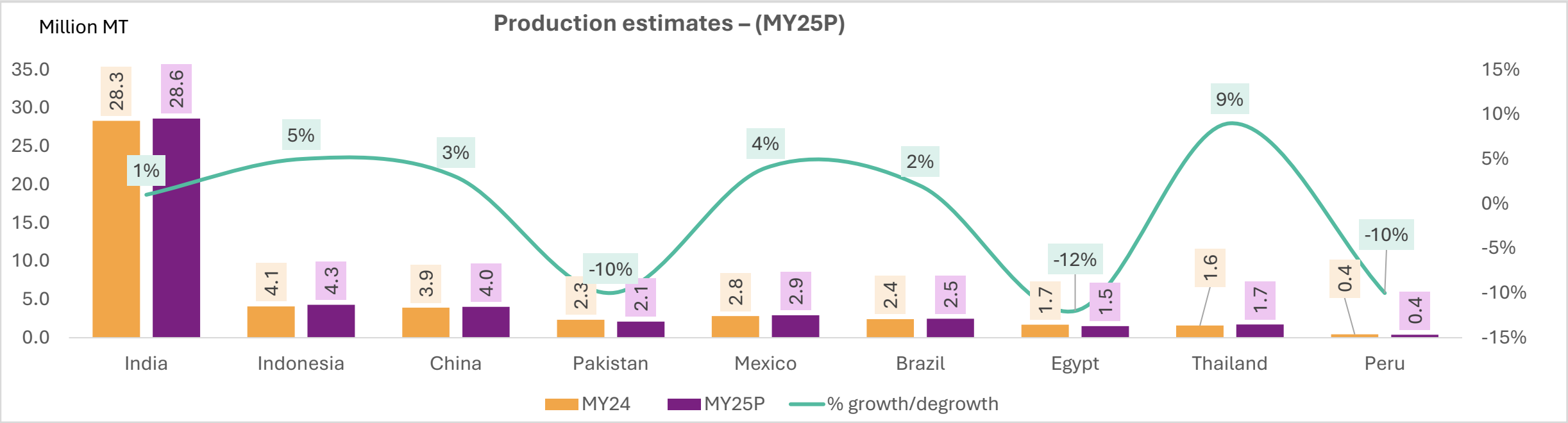


P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts acreage figures for mango, mangosteen and guavas

- 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%*.
- 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 MY25P driven by strong exports in 2024 wherein mango topped the fruit exports in the country.

*Source -Statistics of Horticulture, Indonesia

Production estimates of major producing countries



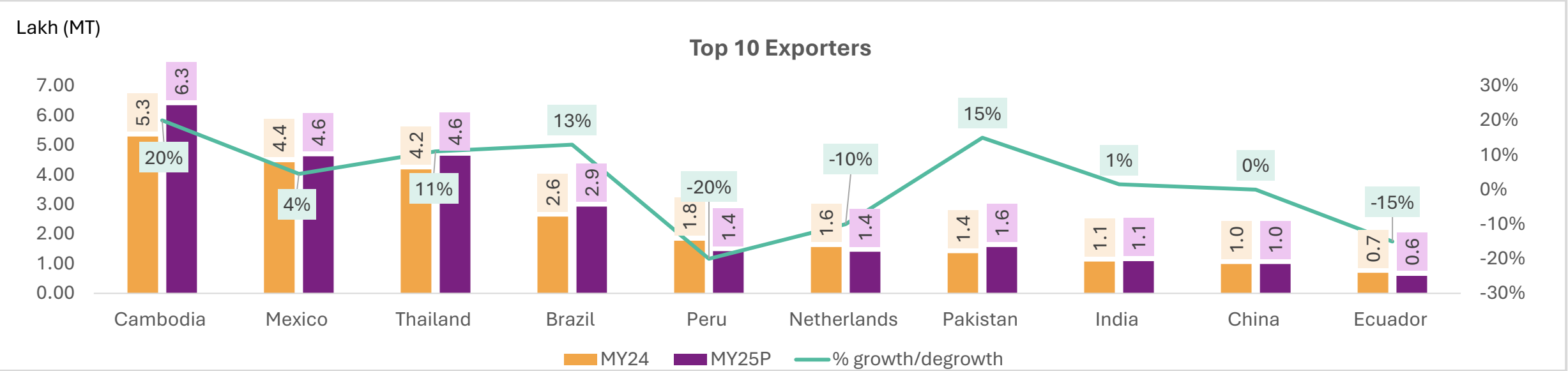
P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts production figures for mango, mangosteen and guavas

- 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. While for countries like **Peru alternate bearings and delayed flowering is expected to hit supplies this season**.
- **Thailand** is estimated to see increase in production levels **due to favorable weather conditions** for its widely exported variety Nam Dok Mai.
- **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 which has **not only impacted production levels but reportedly also the quality of produce**.
- **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

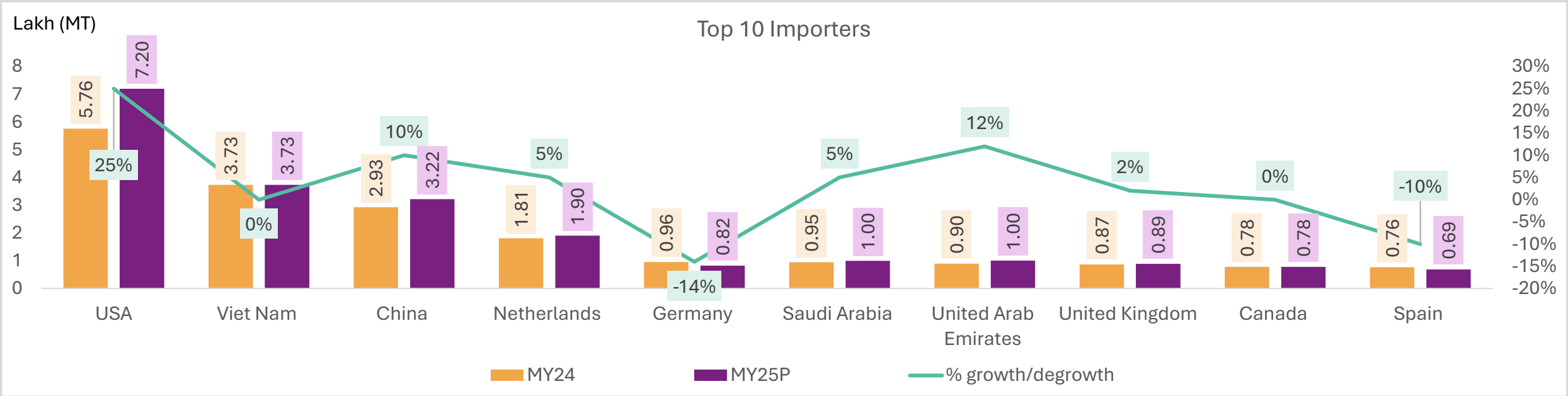


% share of global imports	18%	15%	14%	9%	6%	5%	5%	4%	3%	2%
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P – Projected value; MY – Marketing year (Jan-Dec), HS Code : 08450

- 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's agreement with Laos** is expected to boost mango exports via **Laos' high-speed rail**. Meanwhile, growing US demand for Kent varieties from Mexico has fueled export momentum from Cambodia.
- Mexico's exports are expected to rise 2-5%**, driven by demand from the US, Canada, and Europe, as the last shipments of Kent and Keitt from the Northwest are dispatched, following the end of Ataúlfo production.
- South Korea's expanded import quotas and tariff cuts**, including **eliminating the 30% tariff on mangoes**, are expected to boost Thai exports. In contrast, Peru's exports may decline in MY25P due to competition from West Africa in Belgium, Netherlands, and Italy.
- Indian exports are projected to rise**, driven by government initiatives like Mango Mania 2025, improved sea protocols, and growing demand in key markets like the UAE.

Major importers of Mangoes



% share of global imports	22%	14%	11%	7%	4%	4%	3%	3%	2%	2%
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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.
- **The Netherlands market** is transitioning **from Peruvian to Ivorian mangoes**, with Ivorian mangoes priced **\$3-4/kg lower**. However, demand for Peruvian mangoes is expected to remain strong due to their superior quality.
- **Indian exports are likely to be lower on year owing** to rising quality concerns for alphonso variety in key importing countries like middle east countries which is expected to impact the demand.

Way Forward for Indian Mango Exports

United Kingdom : The UK, **accounting for around 4% of global mango imports**, presents a significant opportunity for India to expand its market share.

- Despite being the second-largest supplier by volume, India ranks fourth in value terms, indicating a gap in its current market positioning.
- The recently signed India-UK FTA, early-season advantage, and potential for brand-led premiumization are expected to drive growth for India.
- To capitalize on this, India can focus on improving cold-chain reliability, developing effective ripening protocols, and leveraging origin-based branding, such as Alphonso and Kesar, to enhance price realization and strengthen its market presence.

South Korea : South Korea's mango imports have experienced rapid **growth, with a 21% CAGR from MY20-MY24, driven primarily by Thailand's surge in exports.**

- Although India attempted to enter the market in 2017, quality and logistics issues hindered its progress.
- South Korea's premium consumer base and growing food sector offer India an opportunity to explore alternative exports, such as mango pulp and puree, which make up nearly 50% of India's export basket..
- Re-strategizing under CEPA is crucial for India to establish a long-term presence in South Korea's high-growth market, while diversifying away from saturated markets like the Middle East.



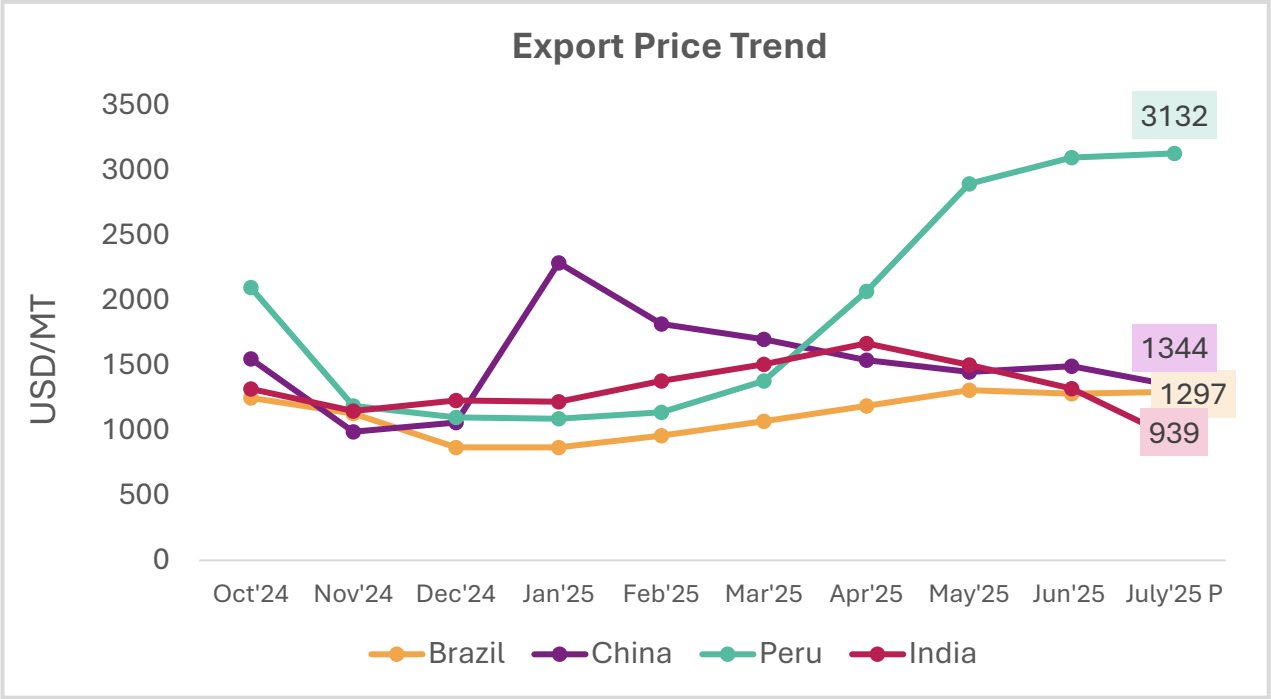
Way Forward for Indian Mango Exports

Malaysia : Malaysia offers a promising market for Indian mango exports, with the **India-Malaysia CECA providing preferential tariffs since 2011.** Although **logistics and supply issues have limited India's presence,** there is **no shortage of demand.**

- The growing trend of health-conscious consumption and **use of tropical fruit purees and pulp in beverages and foodservice** presents an opportunity for India.
- With a **potential review of the ASEAN-India Trade in Goods Agreement by 2025,** India can strengthen its position by **forming partnerships,** launching premium products, and preparing for improved market access. Malaysia's tariff advantages and rising demand for value-added mango products make it an attractive target market for strategic entry.



Export prices forecast



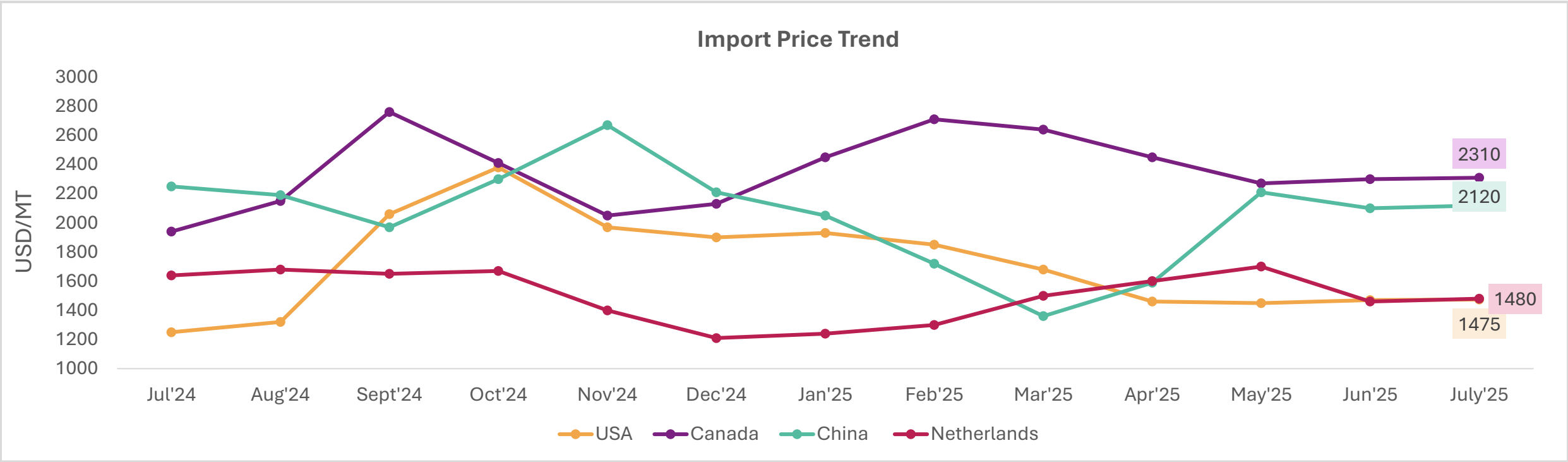
Price outlook for next quarter (ASO)					
Countries	Jul'25 Price (USD/MT)	Jul'24 Price (USD/MT)	%age change on year	Price direction	Average price range for ASO (USD/MT)
Brazil	1297	1610	-19%	Bullish	1400-1410
China	1344	1780	-24%	Sideways	1320-1330
Peru	3132	2050	53%	Bullish	3400-3420
India	939	1620	-42%	Sideways	950-960

- **Brazil**, a key off-season supplier, is **expected to see a price uptrend in the next quarter**, driven by its dominance from mid-August to mid-November. This season's **quality is also exceptional due to favorable, drier weather conditions**, a significant improvement over last year.
- **China's mango prices rose in January '25** due to production and quality concerns with the Guifei variety, caused by a super typhoon in Sept '24. Despite a 30-35% price drop, Guifei mangoes are now trading at similar levels to last year. **Strong demand from countries like Vietnam is expected to keep prices firm in the coming quarter.**
- **Peru harvest to begin from November**, wherein domestic production is expected to be impacted due to delayed flowering which is expected to keep prices firm on year from November onwards.
- **India's mango export prices are expected to remain subdued** due to a shift towards cheaper varieties like Kesar, which are 40-45% cheaper than Alphonso. While Kesar exports have grown 18% CAGR, Alphonso exports have declined 4% CAGR. Additionally, declining mango pulp realization and unseasonal rainfall affecting quality are likely to keep prices lower this year.

1. Based on MY21 and MY22, P – Projected value; MY – Marketing year (Jan-Dec), HS Code : 08450

Source: Crisil Intelligence & ITC trade map

Price trends of key importing nations



- **With Imposition of 50% import duty on Brazilian mangoes, USA is expected to see downtrend in supplies from Brazil.** Overall supply to US from Mexico is comparable to the same period last year. Smaller volumes are arriving from countries such as Guatemala, Nicaragua, the Dominican Republic, and Haiti, with availability mainly on the East Coast.
- Canada has witnessed supplies from Mexico, India, Thailand and Colombia, **the prices are expected to remain firm** due to rising demand for Atalufo mangoes and demand for red mangoes have started to pick up too which will support prices in the next quarter.
- **Consumer demand remains positive in Netherland** which has kept prices higher on year; However, market is witnessing overlap in supply due to delayed shipments from Peru due to logistical challenges, which are reportedly arriving alongside the first consignments from Ivory Coast.

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.

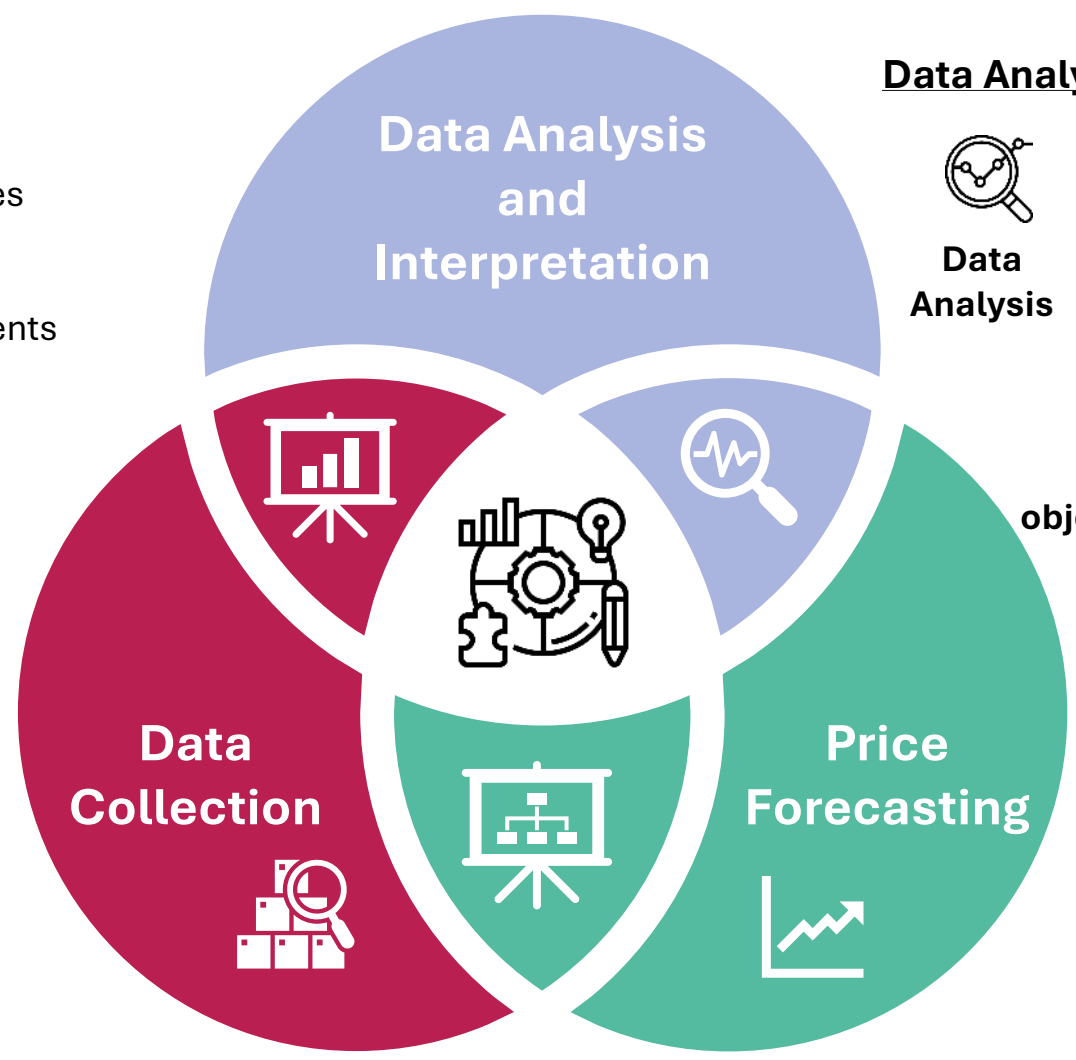
Data Collection

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

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



Data Analysis and Interpretation

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

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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.