

Monthly dashboard – Mango

Aug-2025



***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												

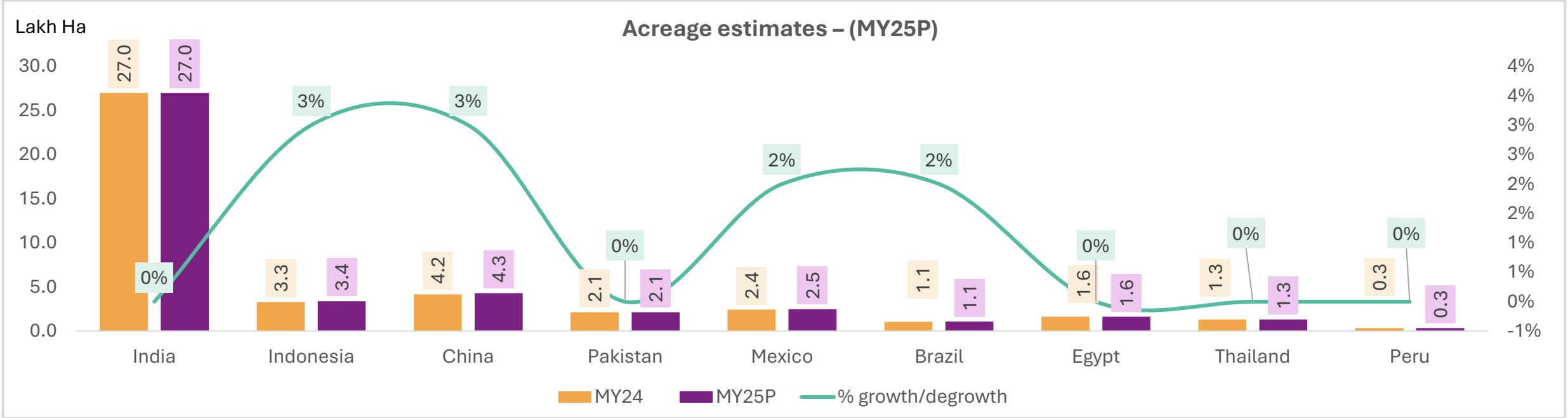
Lean season

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

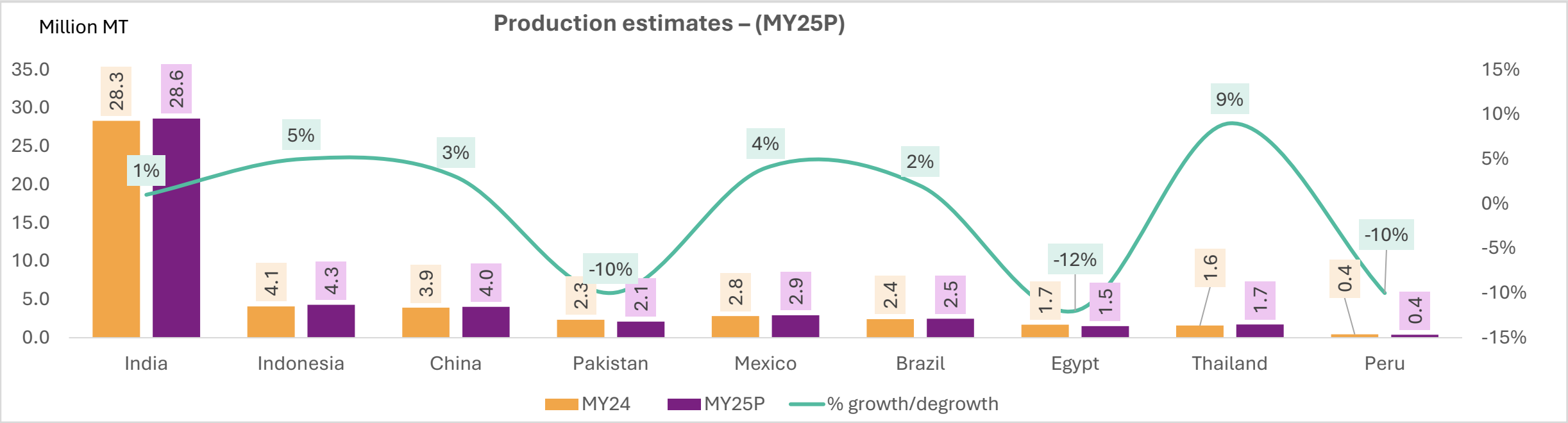
Acreage estimates of major producing countries



P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts acreage figures for mango, mangosteen and guavas ¹ Source -Statistics of Horticulture, Indonesia

- 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%¹.
- 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.
- 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.

Production estimates of major producing countries



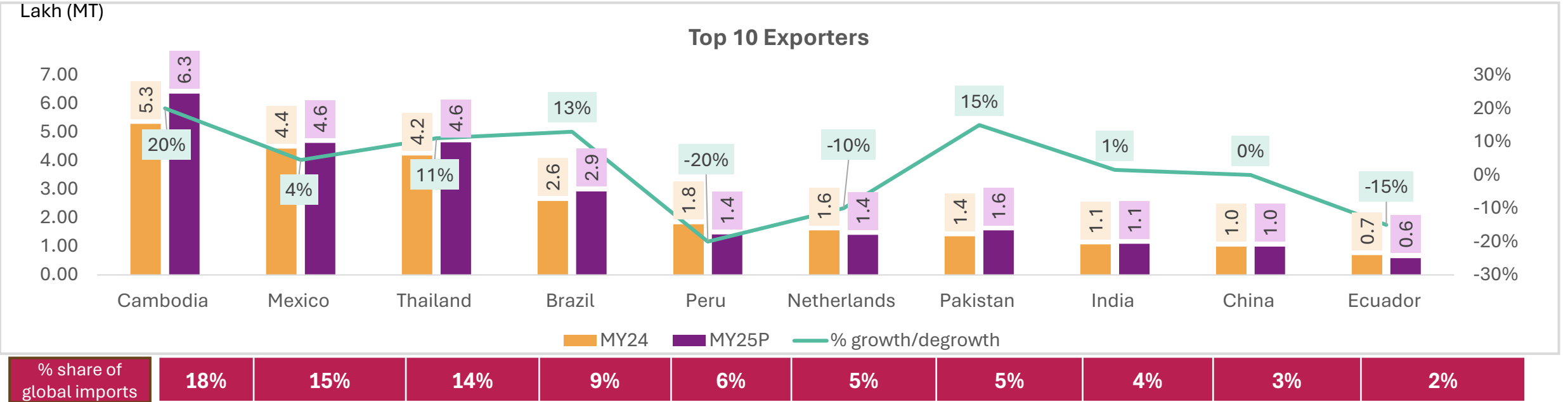
P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts production figures for mango, mangosteen and guavas

- The countries in the chart contribute 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 are expected to witness a 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.
- In Peru, flowering delays in Piura and Motupe, two of the country's most productive mango regions, have pushed harvest timelines back.
- Thailand is estimated to see increased 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 as water scarcity situations which have not only impacted production levels but also the quality of the produce.
- Mango production in Egypt is estimated to have witnessed 70-80% 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

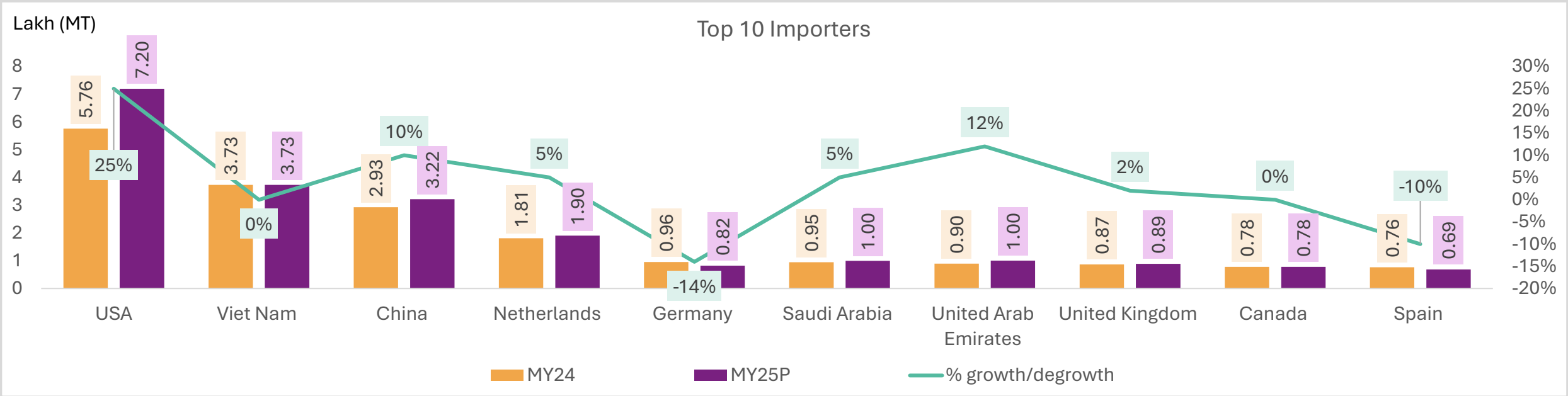
Major exporters of Mangoes



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.
- Mexico exports are estimated to have increased by 2-5% wherein Ataúlfo production ended weeks ago, and currently only the last shipments of Kent and Keitt from the Northwest remain. The exports momentum received demand from USA, Canada and Europe.
- 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. Exports to be supported by rising popularity for mango sticky rice witnessing a robust demand from South Korean restaurant chains.
- While Peru facing competition in Belgium, Netherlands and Italy from west African supplies is expected to see a downtrend in MY25P. Indian exports projected to increase YoY led by government focus for like promotional events like Mango Mania 2025 in Abu Dhabi , development of sea protocols, as well as growing demand in key importing countries like UAE.
- Pakistan’s mango target of \$100 Mn exports in MY25 is estimated to support exports wherein they are targeting Japan, the US, Korea, and Australia, while placing special focus on expanding in Turkey and China.

Major importers of Mangoes

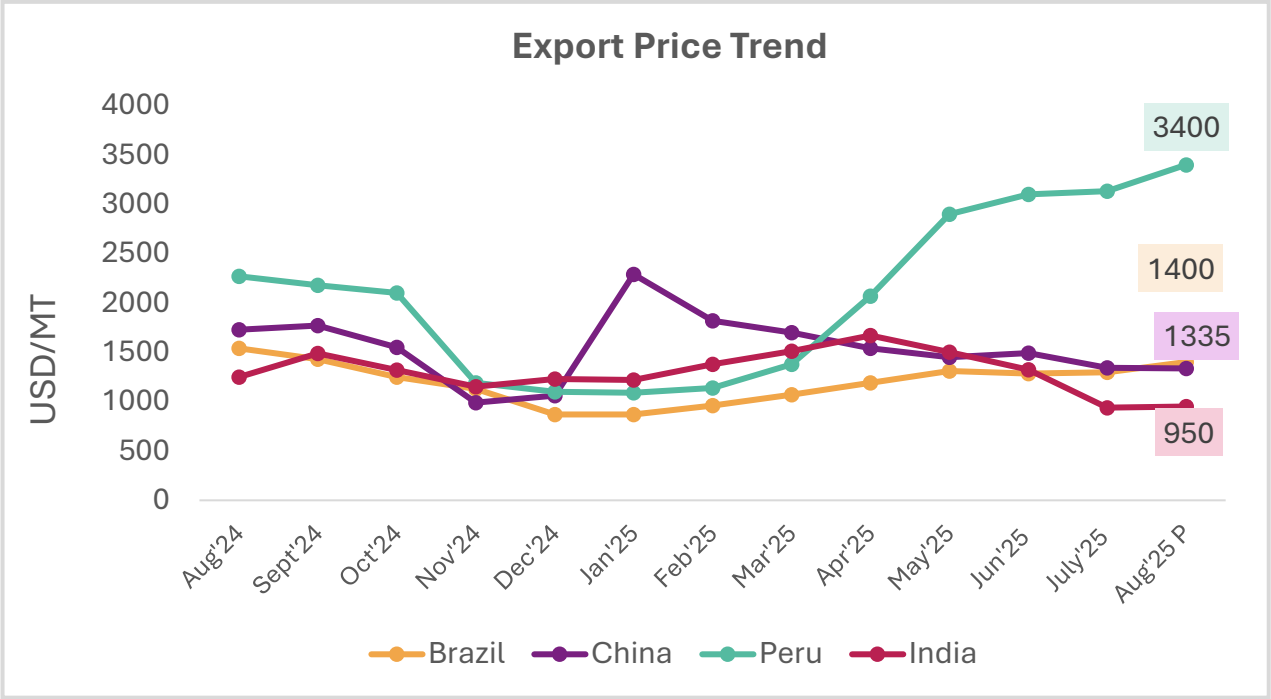


% share of global imports	22%	14%	11%	7%	4%	4%	3%	3%	2%	2%
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P – Projected value; MY – Marketing year (Jan-Dec), HS Code : 08450

- 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 Atalupo 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 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.

Export prices forecast

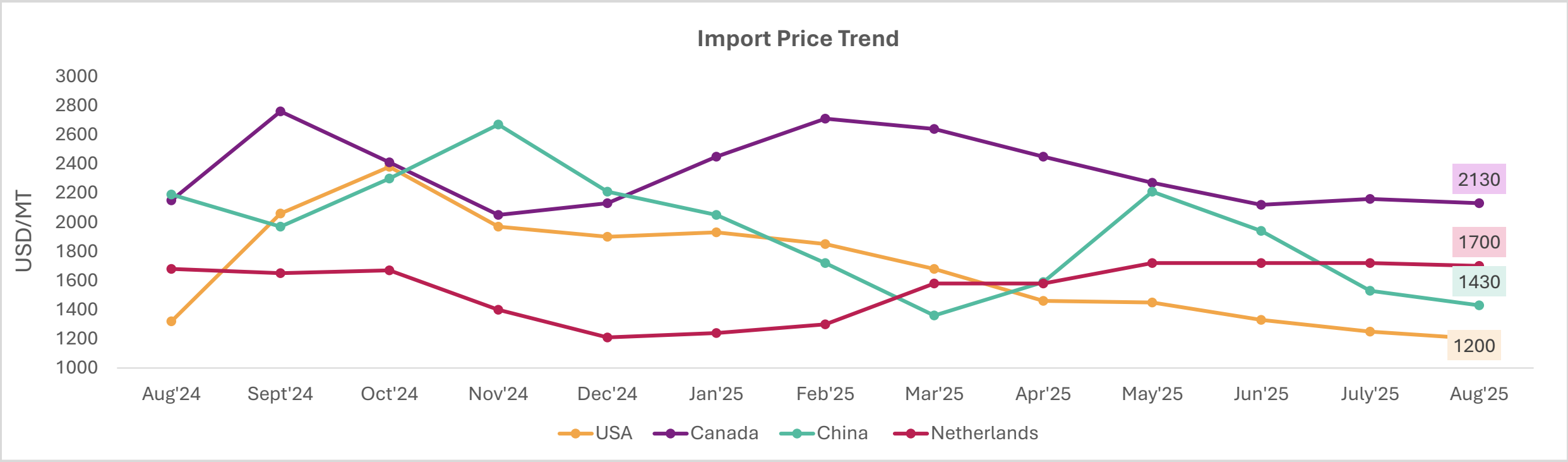


Price outlook for next quarter (SON)					
Countries	Aug'25 Price (USD/MT)	Aug'24 Price (USD/MT)	%age change	Price direction	Average price range for SON (USD/MT)
Brazil	1400	1540	-9%	Bullish	1400-1410
China	1335	1730	-23%	Sideways	1320-1330
Peru	3400	2270	50%	Bullish	3400-3420
India	950	1250	-24%	Sideways	940-950

- Brazil being the off-season supplier with dominance during mid-August to mid-November is expected to see uptrend in prices in next quarter. Further, the quality is also very good this season as Brazil has had much better, drier weather over the last few months compared to last year. Despite import restriction, demand for US for Brazilian atkins varieties have remained strong which is further expected to support prices
- China witnessed an uptick in prices in January’25 driven by production and quality concerns surrounding the demanded Guifei mango variety. The impact of super typhoon in Sept’24 led o significant flower drop, reducing early-season mango production. Guifei mangoes are trading at 30-35% lower prices than the early season prices of Jan-Feb and are at similar level to last year’s prices. Growing demand from countries like Vietnam to keep prices firm in coming quarter as well.
- 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. Low rainfall between July and September could further limit fruit development.
- India’s export realization for mango pulp (~50% share in export basket) has witnessed a downtrend of CAGR -6% in past five years over lower product quality while fresh mangoes export have witnessed shift towards relatively cheaper mango varieties like Kesar which are 40-45%¹ cheaper than alphonso variety. While exports for kesar mangoes have grown at a CAGR of ~18% , alphonso variety has a registered negative CAGR of 4%. The shift towards lower priced varieties along with declining pulp realization is expected to keep India’s mango export prices tamed. Unseasonal early rainfall in May have raised quality concerns in key destinations which is estimated to keep prices lower on year.

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

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.
- Due to Peru’s delayed harvest calendar, the US may face a supply gap from Sep-Nov, as Mexican volumes decline during this period and Peru’s supplies are expected to be delayed. This shortfall could push import price higher, with risks further aggravated if the anticipated water storage occur in Peru .
- Canada has witnessed supplies from Mexico, India, Thailand and Colombia, the prices are expected to remain firm due to rising demand for Ataluf 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.

Way Forward for Indian Mango Exports

Singapore :

- Singapore **imports about 28,000 tonnes of mangoes annually**, valued at close to USD 28–29 million, but **India captures only ~1% share**, despite being geographically close and a natural supplier.
- The overall market has grown at a modest 1% CAGR over the past 5 years, but short-term import trends show fluctuations, suggesting inconsistent sourcing and opportunities for reliable suppliers to strengthen their position.
- **Policy context remains favorable wherein India and Singapore** are linked through the **Comprehensive Economic Cooperation Agreement (CECA)**, and Singapore follows a liberal, **zero-tariff regime for fruit imports**.
- The main constraints for India have been quality consistency and supply reliability, as Singapore buyers are highly quality-conscious and quick to switch to other origins like Thailand or Malaysia when supply falters.
- Singapore offers a logistics advantage for India, with very short transit times by sea (4–6 days) or air (<1 day), which reduces perishability risk and makes frequent small consignments feasible.
- By leveraging CECA facilitation, India can pursue a two-pronged approach building a 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.



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.

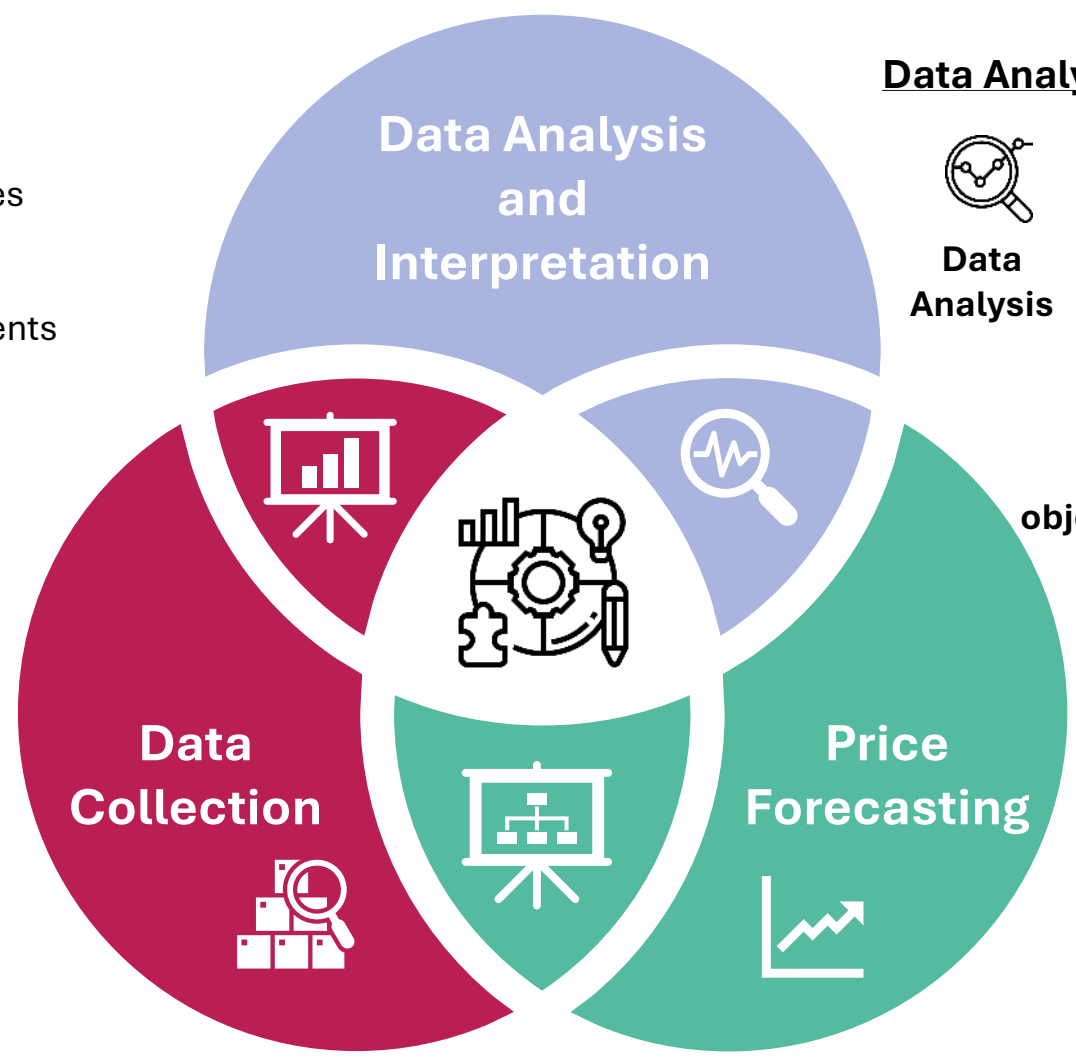
Data Collection

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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.