Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Mango

Nov-2025

Acreage and production trends

Mango crop calendar of major producing countries

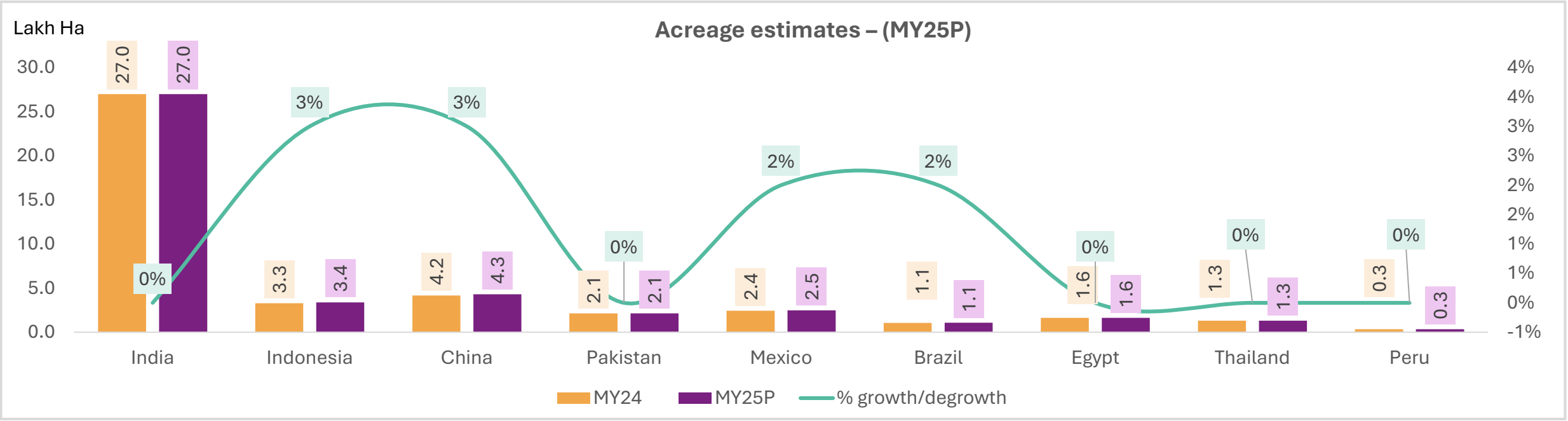
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
India												
Indonesia												
China												
Pakistan												
Mexico												
Brazil												
Peru												
Egypt												
Thailand												

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, 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

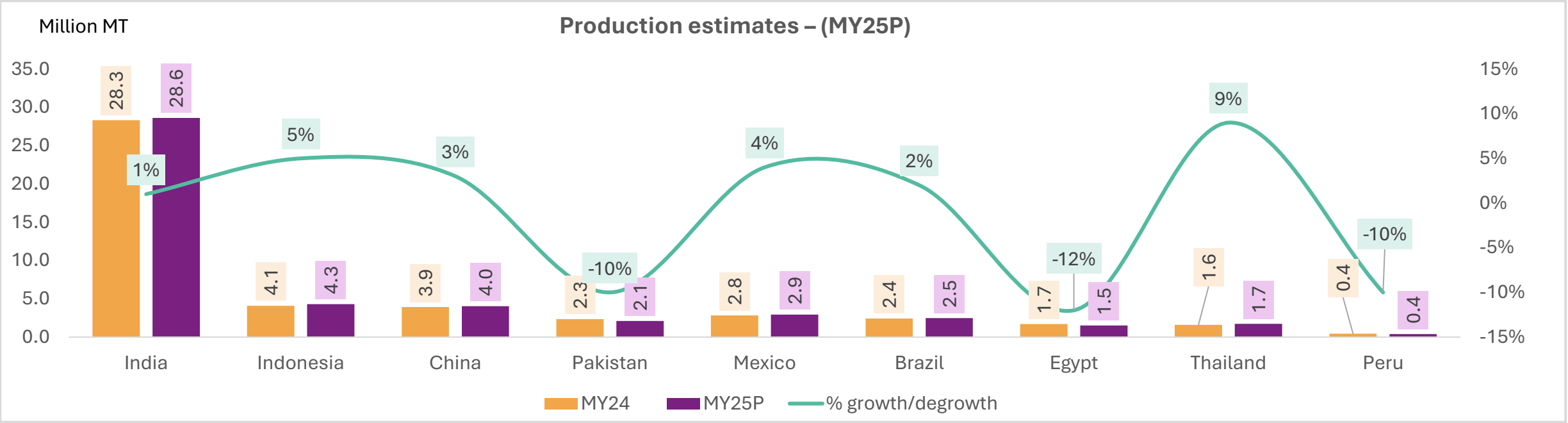


P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts acreage figures for mango, mangosteen and guavas

- 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 ~5%[1].
- China's, strong domestic price realizations in MY2024 has encouraged the area for MY25P, wherein the prices were 12% YoY higher (June-August). Prospects remained strong for MY26 as well.
- 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.

[1] *Source -Statistics of Horticulture, Indonesia*

Production estimates of major producing countries

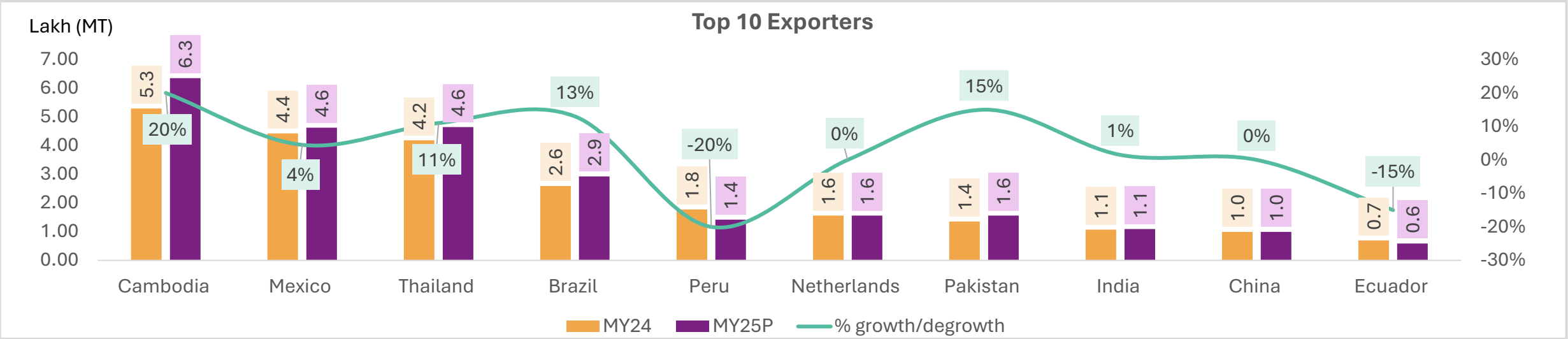


P – Projected value; MY – Marketing year (Jan-Dec) Note- Sample set depicts production figures for mango, mangosteen and guavas

- 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, limited the potential increase in production in MY25. Favorable weather conditions in Brazil wherein cooler temperatures have prompted floral induction has further supported 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.**
- **Peru's** mango output is **expected to decline ~10% YoY**, lowering exports when compared to last season, driven by **delayed flowering** and **phenological disruptions** limiting market supply.
- **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 estimated to have witnessed 70-80% lower flowering due to intense summer heat and other weather stresses which had impacted production in MY25.
- **India's production is estimated to have 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

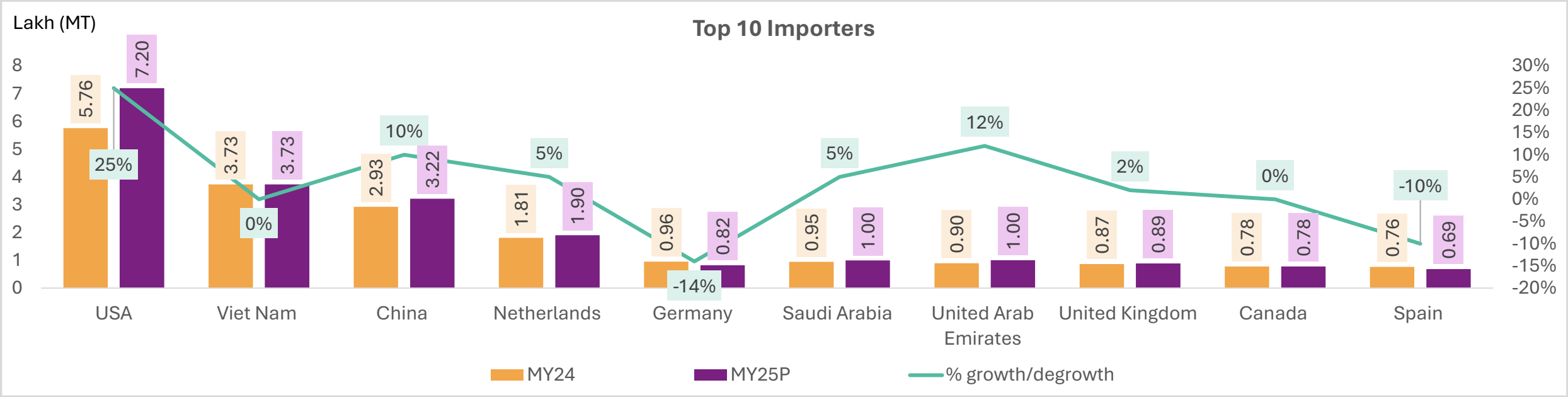


% share of global imports	18%	15%	14%	9%	6%	5%	5%	4%	3%	2%

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.
- The 2025 mango export campaign ended on a **historic high** for **Mexico**, with shipments reaching **~4 Lakh MT** (**95.6 million boxes**), surpassing previous seasons. This elevated export base strengthens Mexico's market position ahead of the **next export cycle** beginning in **January 2026**.
- Despite US tariffs, **Brazil maintained a strong export momentum in** 2025. Demand for kentt and keitt varities have remained strong in European market. **Brazil** exported **~2.6 Lakh MT** of mangoes during **Jan–Nov 2025**, **up ~13.5% YoY**, driven by **strong EU demand** led by **the Netherlands (~48%).** Despite **weaker U.S. shipments** in **November**, overall exports remained **higher** than last season.
- **Ecuador** led global mango shipments in the week ending Nov 1, 2025 with **~0.6–0.7 million metric tons** exported, reflecting **peak seasonal supply** to the **U.S.** and **Europe** as **Mexico winds down**, influencing **short-term availability** and **pricing dynamics**.
- **Peru** supplies have **hit** the markets, wherein supplies are expected to ramp up December onwards wherein **demand for larger fruits in size 10 and 12** is existing in market currently. However, **lower domestic production** to keep exports **lower YoY** in MY26P.

Major importers of Mangoes

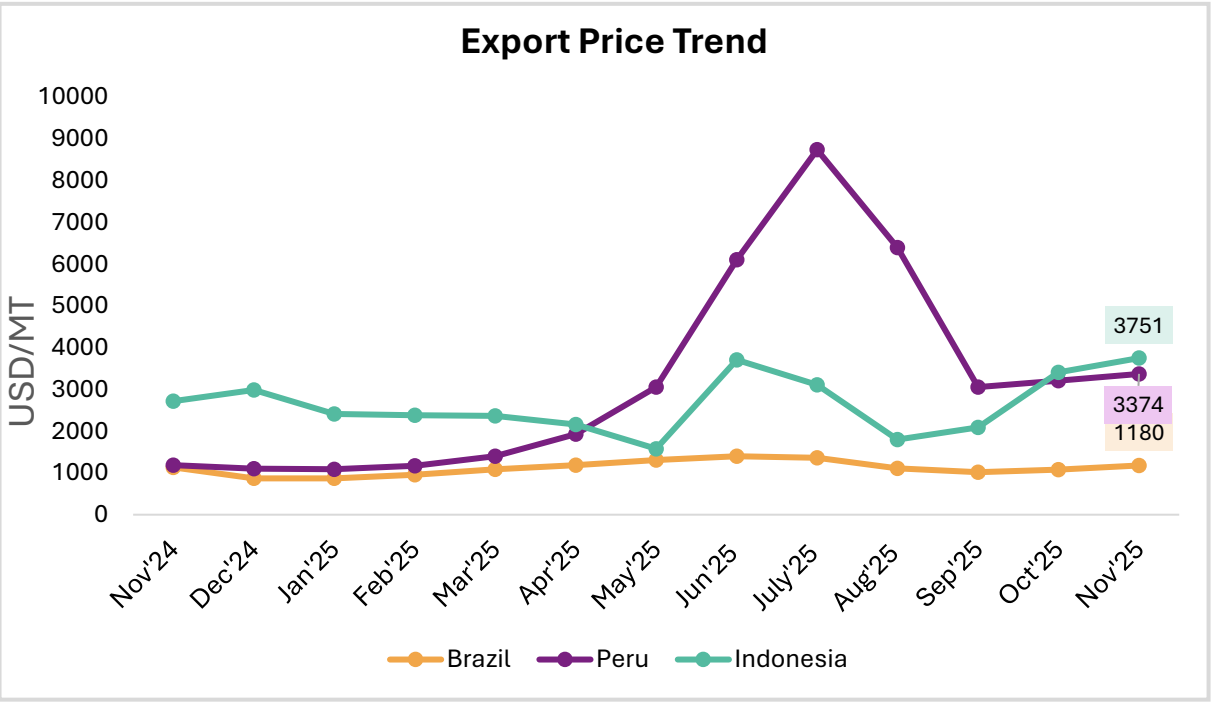


% share of global imports	22%	14%	11%	7%	4%	4%	3%	3%	2%	2%

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 have experienced strong growth**, driven by increased harvest volumes, particularly from Guatemala and Nicaragua. However, now the momentum has softened with largely only one key variety being imported, Tommy Atkins (80-85%) from Brazil, Ecuador and Atalufo (60-65%)from Peru.
- **Saudi Arabia (~1.02 Lakh MT)** and the **UAE (~1 Lakh MT)** maintain strong **mango import demand**, driven by large **South Asian expatriate populations** and **rising retail/HoReCa consumption**, with a notable preference for **premium Indian** varieties such as **Alphonso**, **Kesar**, and **Dasheri**.
- **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

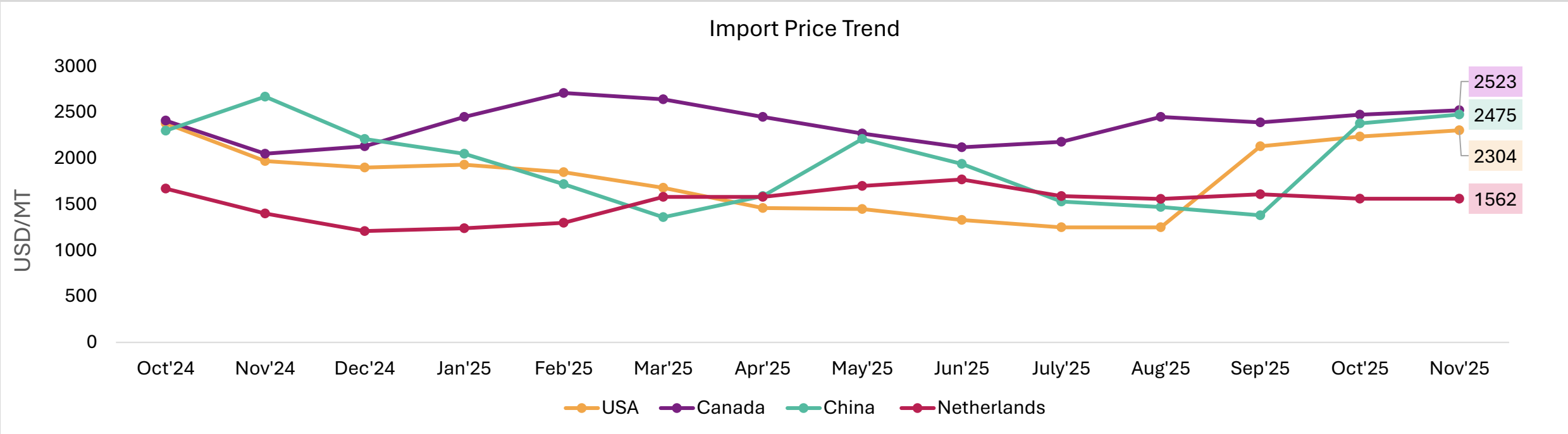


Price outlook for next quarter (DJF)					
Countries	**Nov'25 Price (USD/MT)**	**Nov'24 Price (USD/MT)**	**%age change**	**Price direction**	**Average price range for DJF (USD/MT)**
Brazil	1,180	1,130	**4%**	**Bullish**	1,200-1,240
Peru	3,374	1,190	**184%**	**Bearish**	2,640-2,680
Indonesia	3,751	2,740	**38%**	**Bullish**	4,080-4,120

- **Brazil's mango exports** are **tapering** as the season progresses, with early **São Paulo Tommy Atkins** harvest, reflecting **tight supply**. Limited overlap with **Peru** and **steady EU demand** are expected to keep export prices **stable to firm** through **Dec–Feb**.
- In **Peru**, despite **lower annual mango exports** (~140 kt in 2025 vs ~180 kt in 2024), **fresh harvest arrivals** from **December** are expected to increase near-term supply, keeping **export prices soft** in **December–January**. As the season tapers toward **February**, tightening availability may support **price stabilization** or a **marginal upward correction**.
- **Indonesia's Ministry of Trade** is actively **expanding tropical fruit exports**, including **mangoes**, to new markets such as **Canada** under the **Indonesia–Canada Comprehensive Economic Partnership Agreement**. Improved market access and demand diversification are expected to keep mango **export prices firm to bullish** through **December–February**, despite moderate seasonal volumes.

1. Based on MY21 and MY22, Source: Crisil Intelligence & ITC trade map P – Projected value; MY – Marketing year (Jan-Dec), DJF – December, January and February 2026, HS Code : 080450

Price trends of key importing nations

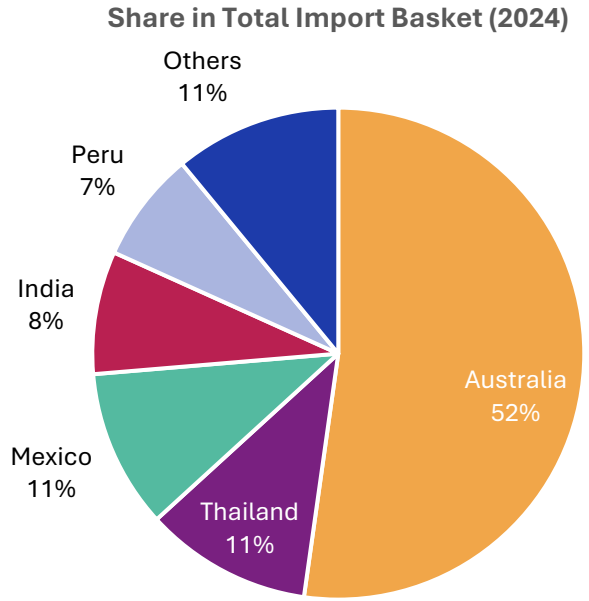


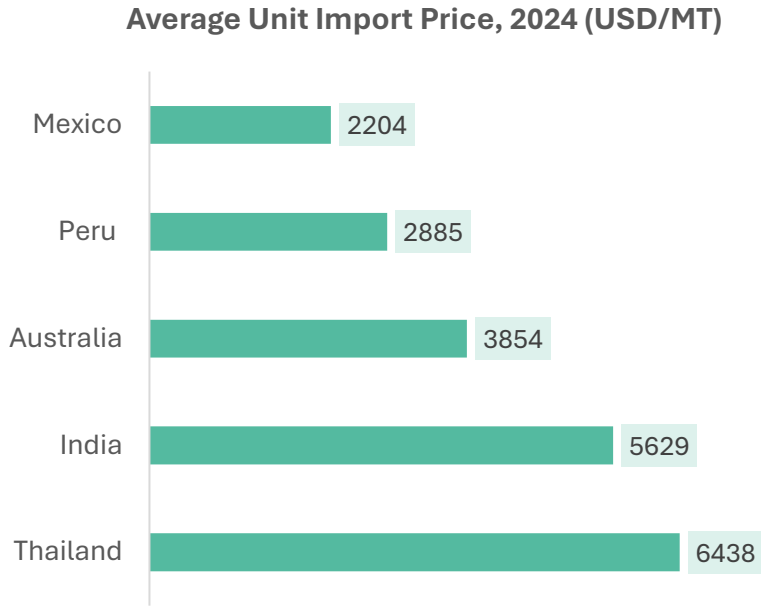
- The overall supply of mangoes to the US from Brazilian is expected to be higher and lower from Ecuador and Peru in MY25P.
- The **US is facing supply tightness** due to Mexico's declining volumes and Peru's delayed harvest, which could lead to **higher import prices**, especially if water storage issues 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's** mango imports remain structurally dependent on overseas supply during winter, with steady demand for **Tommy Atkins**, **Kent**, and **Ataulfo varieties**. Relatively **modest import volumes** and seasonal reliance on **Latin American origins** are expected to keep **import prices firm** through **November–December**.
- Mango import prices in **the Netherlands** remain supported by **restricted arrivals** at **Rotterdam**, partly due to **logistics** and **port-related constraints**, while its role as a key **EU redistribution** hub **sustains steady demand**. With **seasonal supply tightening** across origins, **import prices** are expected to remain **edged up** through **November–December**.

Source: Crisil Intelligence & ITC trade map *P – Projected value; MY – Marketing year (Jan-Dec), HS Code : 080450*

Indian Export Opportunity in New Zealand Market

Imported Volume (2024)	3,455 tonnes
Key Competitive Exporters	Australia, Thailand, Mexico, and Peru
CAGR growth (MY19-MY24)	~12%
India's Penetration (In the country's import basket)	~8%
India's exported volume to the country (2024)	280 tonnes
Key Imported Varieties	Kensington Pride, Calypso, Chok Anan, Kentt, Tommy Atkins, Alphonso, Kesar, and Langra
Key Indian Exported Varieties	Kesar, Alphonso, Langra
Average New Zealand's Import Price (2024)	4,066 USD/MT
Average Indian Export Price (2024)	5,629 USD/MT
Key Value-Added Products Imported	Frozen mango pulp, Yoghurt, flavored milk, Dried mango slices.





- **Australia** dominates **New Zealand's mango imports** (**~52%**), benefit from **low-cost** bulk supplies targeting value segments.
- Despite competitive pricing, **India** holds only **~8%** share of **NZ's mango** imports versus **Thailand's ~11%; zero-duty** certainty under the **India–NZ FTA strengthens** India's ability to compete with Thailand and scale its market share.
- **Pre-FTA**, Indian mangoes faced **MFN tariffs**, impacting **landed cost** and **limiting competitiveness**.
- **Post India–New Zealand FTA**, **zero-duty** access **improves price competitiveness** and margin headroom for Indian exports.
- New Zealand offers a **stable**, **high-value market** with **strong cold-chain infrastructure** and **counter-seasonal demand**, supporting India's export scale-up.
- **Leveraging tariff removal**, **India** can expand share beyond niche channels, while **NZ** benefits from supplier diversification beyond **Australia**.

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.

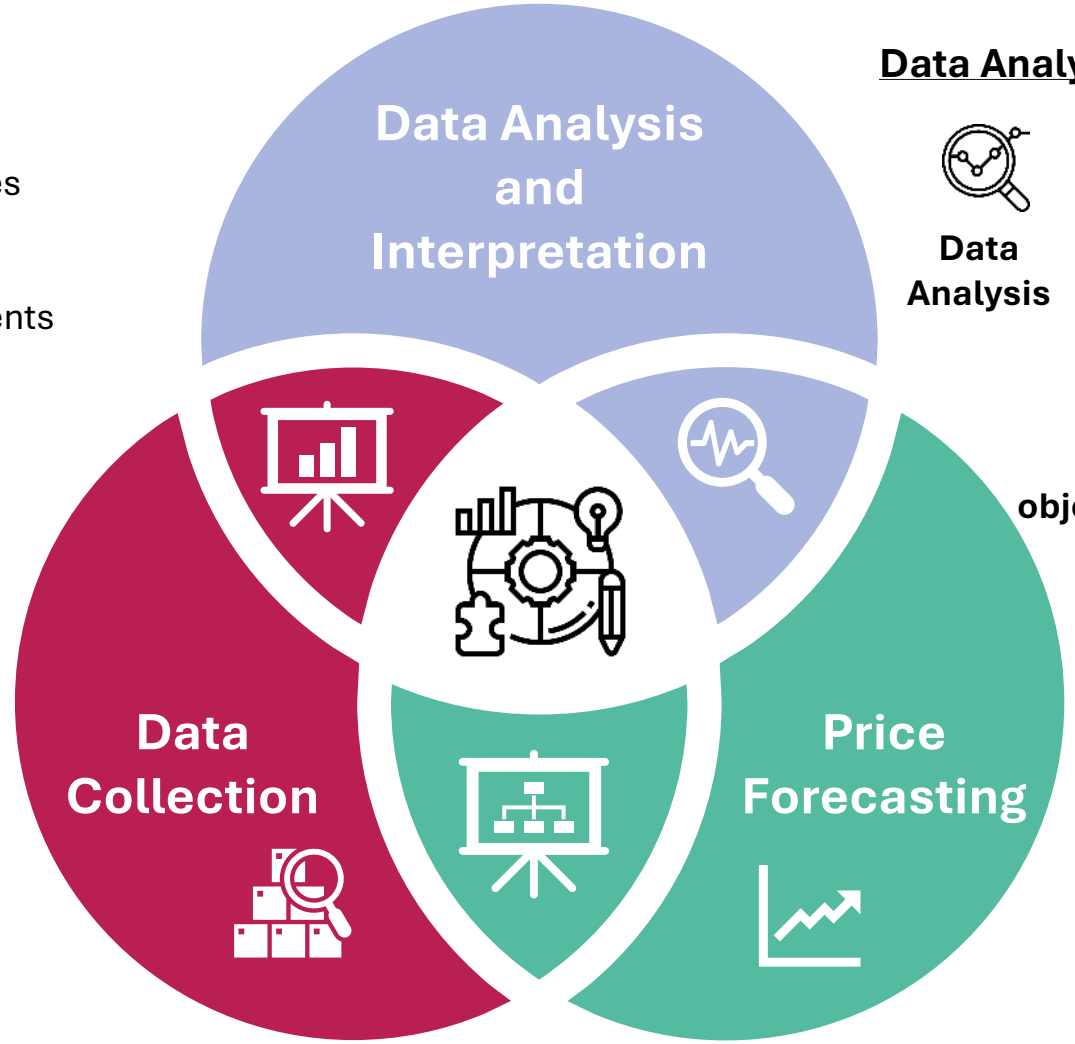
Data Collection

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.