Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Mango

HSN Code: 080450

March 2026

Acreage and production trends

Mango Crop Calendar of Major Producing Countries

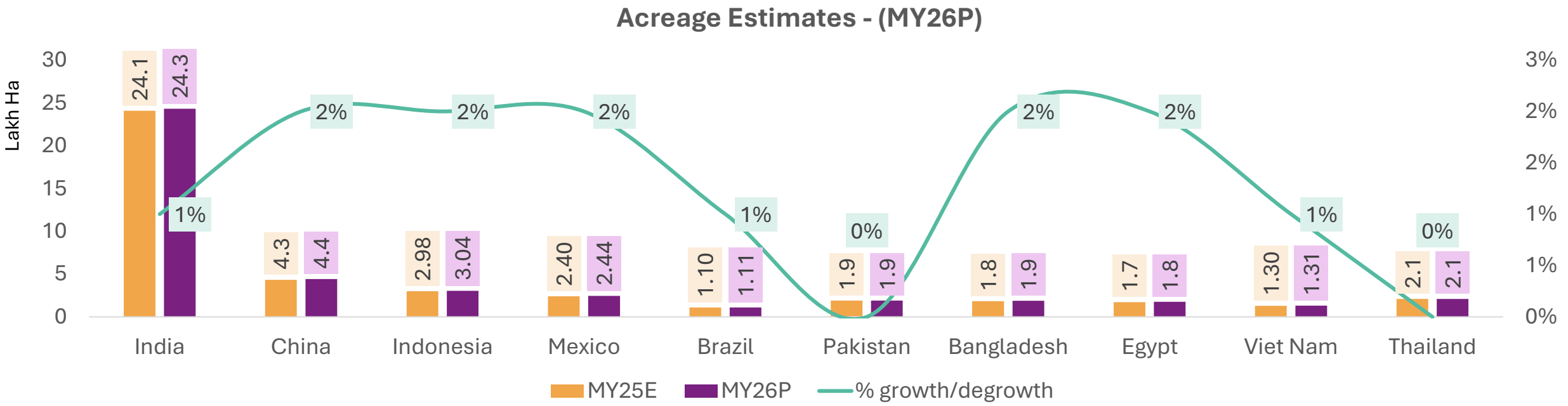
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
India												
China												
Indonesia												
Mexico												
Brazil												
Pakistan												
Bangladesh												
Egypt												
Vietnam												
Thailand												

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 and Brazil stands out with a unique peak season ranging from August to January, 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**

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

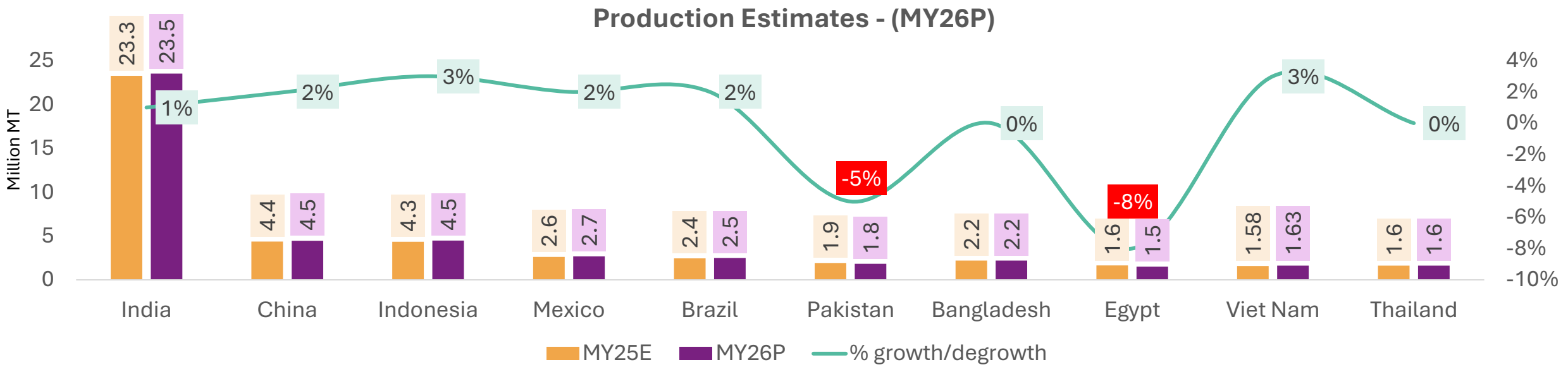


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart **contributes to ~65% of global mango cultivated area**. For MY26P, global acreage is set to rise moderately by **1-2% YoY**, led by **India**, **China**, **Indonesia**, **Mexico**, **Brazil**, **Bangladesh**, **Egypt**, and **Vietnam** 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 share **~5%[1], reflecting increasing domestic demand and improved market access.**
- China's strong domestic price realizations in **MY25E** 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 **MY26P.**
- Brazil is projected to **expand area marginally ~1% under mango in MY26P** driven by strong exports in 2025 wherein mango topped the fruit exports in the country.

Source: FAOSTAT; MY25 acreage estimated and MY26 projected based on historical trends and secondary research; India's acreage referred from MoA&FW and projection based on trend analysis and interactions.
Source 1-Statistics of Horticulture, Indonesia

Production Estimates of Major Producing Countries



P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

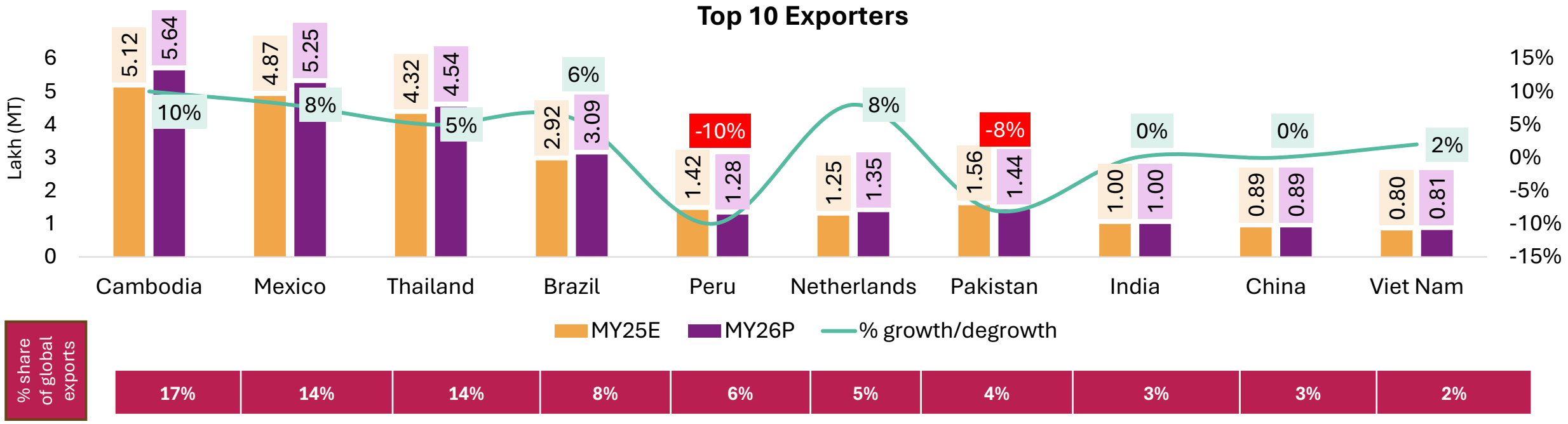
- The countries in the chart **contributes to ~76% of global mango production**. The production for MY26P is expected **to moderately improve by 0-1%** led by India, Indonesia, China, Brazil and Mexico while countries like Pakistan, and Egypt is expected to witness downtrend in production.
- **Mexico's**[1] 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 set to **support production in Indonesia by ~3% for MY26P.**
- **Brazil's** mango production is expected to recover by **30–40%** over last season, with **improved yields** of **Tommy Atkins** and **Palmer varieties** in **São Paulo**. This will support a **2–3% increase**, reaching about **2.5 MMT in MY26P.**
- **Mango production** in **Egypt**[3] 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**[4] **production is estimated to have improve in MY26P** due to increased productivity specifically in southern states like Karnataka and Andhra Pradesh.

Source FAOSTAT; MY25 production estimated and MY26 projected based on historical trends and secondary research. *India's production referred from MoA&FW and projection is based on trend analysis and on ground interactions.*

Sources: 1. Mango World Magazine, 2. Brazil Mango update, 3. Freshplaza 4. India's mango production

Export trends and price outlook

Major exporters of Mangoes



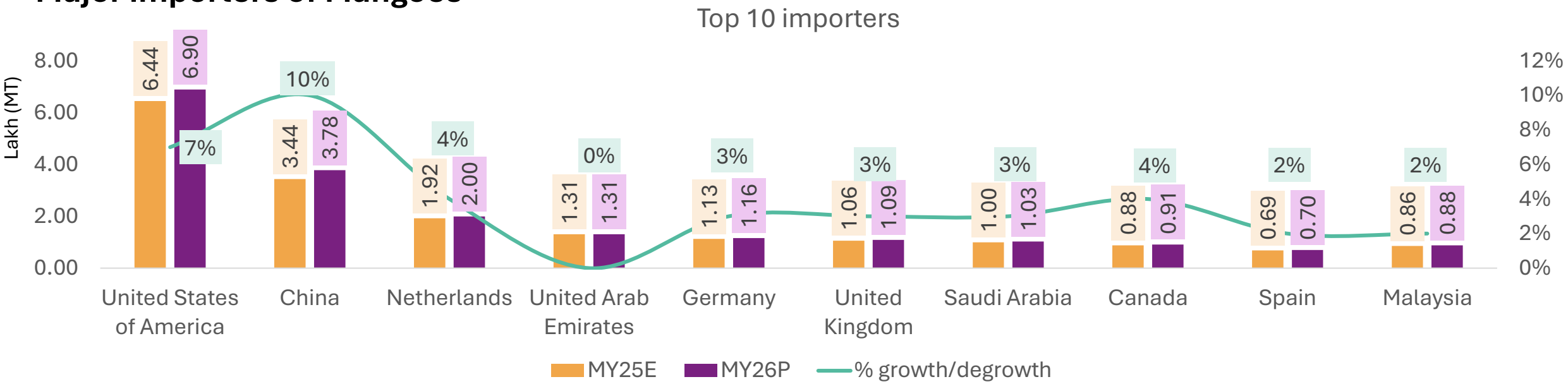
% share of global exports									
17%	14%	14%	8%	6%	5%	4%	3%	3%	2%

P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries listed above account for **~77%** of global mango exports. In **MY26P**, exports are expected to **grow 2–3% Y-o-Y**, driven by higher volumes from **Cambodia**, **Mexico**, **Thailand**, **Brazil**, and **the Netherlands**, while declines in **Peru** and **Pakistan** offset some of the gains.
- **Netherlands'**[1] mango exports are expected to **rise ~8% to ~1.35 lakh MT** in **MY26P**, supported by, **strong re-export hub role (>60% EU imports)**, and **stable Brazil/Peru supply,** and higher domestic throughput **improving intra-Europe redistribution.**
- **India**[2] produces **~30-35%** of global mangoes yet exports only **~1%,** as **~1.4 billion domestic consumers** absorb supply; being an alternative-bearing crop, output is expected to rise by only ~0-1%, while **high logistics costs**, **weak cold chains**, and **strict export standards** constrain shipments.
- **Peru's** upcoming **MY26P** mango season is encountering **significant obstacles** stemming from **excessive rainfall** affecting major **production regions** in the north, particularly **Piura** and **Motupe**. The adverse weather conditions have triggered several cascading issues like **quality deterioration**, **disease escalation**, and **supply reduction.**

Source: ITC Trade Map; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends. HS code 080450 (Fresh and dried guavas, mango, and mangosteens); Source:1. Netherlands export momentum ; 2. India's mango momentum;

Major importers of Mangoes



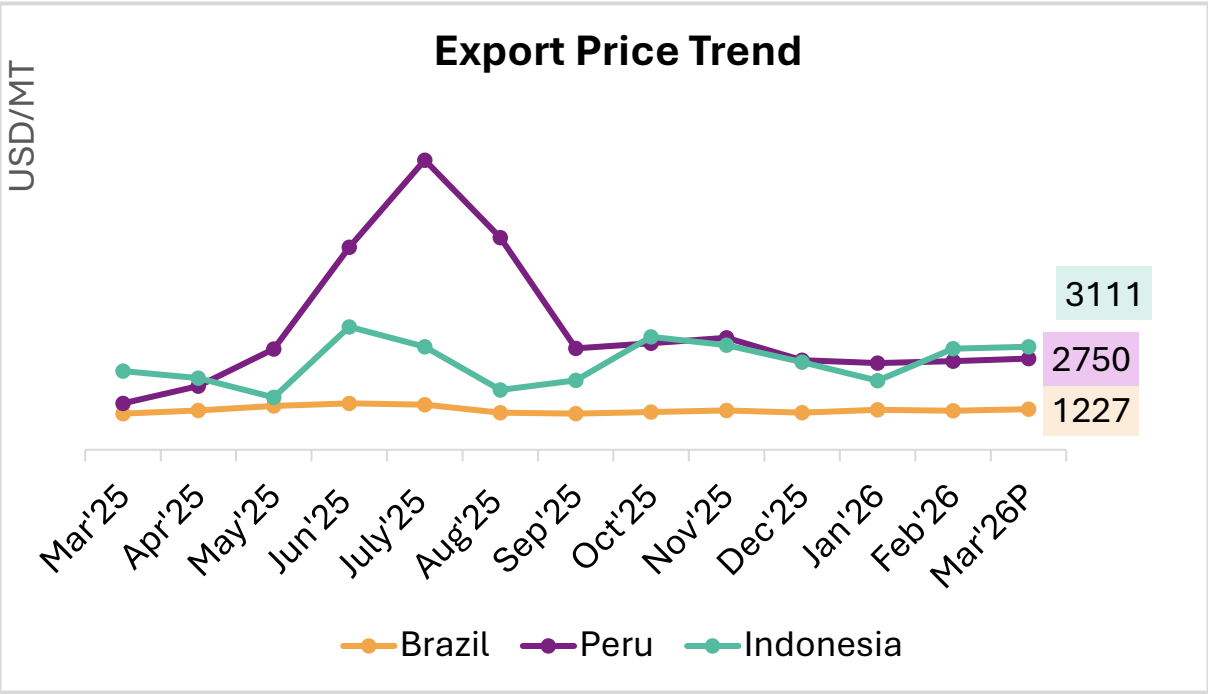
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

% share of global imports	24%	12%	8%	5%	4%	4%	4%	3%	3%	2%

- The countries in chart **account for ~70% of global mango imports**. Mango imports grew at a range of ~4-5% in past decade, from MY15 to MY25E.
- **Canada's**[1] mango imports are anticipated to **rise ~4% to ~0.91 lakh MT** in **MY26P**, driven by **year-round supply of Tommy Atkins (Brazil)**, **Nam Dok Mai (Thailand)**, and **Ataulfo (Mexico)**, alongside **rising consumption** and improved availability from **higher Thailand export volumes.**
- **Mango imports in China** 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**[2] mango import volumes are maintaining their **strength**, underpinned by **consistent European demand** and the **reliable supply** of commercially viable mango varieties. Specifically, cultivars such as **Tommy Atkins** and **Kent** continue to be readily available for export, ensuring a **steady flow** of product into **the German market.**
- **Spain's**[3] mango imports are **rising modestly (~2%)** as **increased Latin American** inflows support supply; the country imported **58,390 MT** worth **€86.5 M**, reinforcing its role as a **Mediterranean redistribution hub.**

Source: ITC Trade Map; MY25E import volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends.. HS code 080450 (Fresh and dried guavas, mango, and mangosteens); Source: 1. Canada's mango import ; 2. Mango Crop Report; 3. Spain's mango imports

Export Prices Forecast

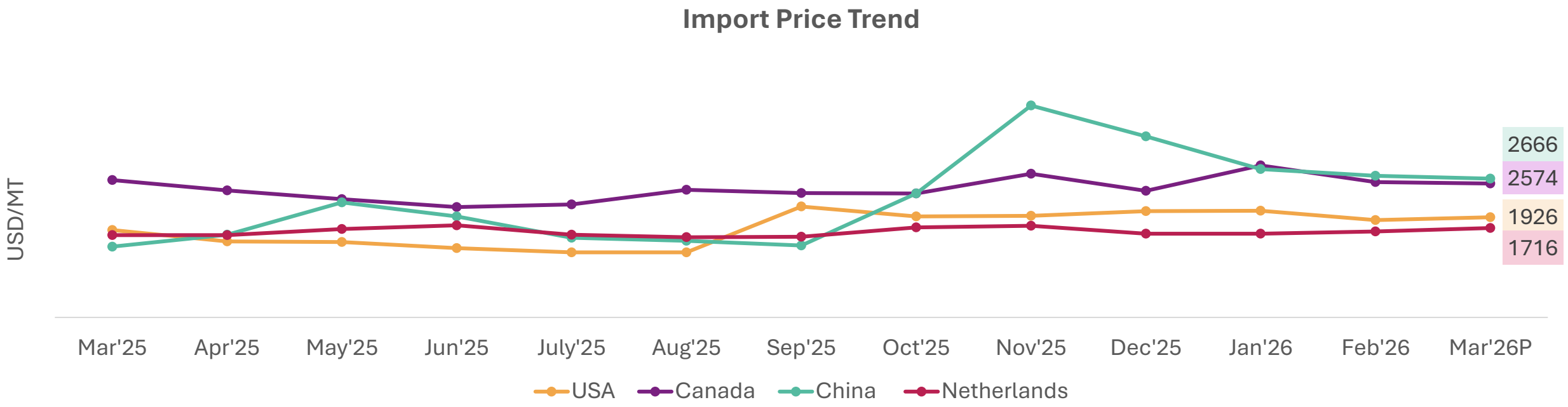


Price outlook for next quarter (AMJ) 2026					
Countries	**Mar'26P Price (USD/MT)**	**Mar'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average forecasted price range for AMJ (USD/MT)**
Brazil	1,227	1,090	**13%**	**Bearish**	1,160-1,220
Peru	2,750	1,400	**96%**	**Bullish**	4,210-4,270
Indonesia	3,111	2,370	**31%**	**Bullish**	2,930-2,990

- **Brazil's** mango prices **rose ~4% MoM in March'26** but are expected to remain **bearish**, as **lean-season supply** overlaps with **rising acreage** and **exports**, while **Mexico** captures key markets **(USA, Spain, Netherlands)**, keeping **global demand well-supplied.**
- **Peru's**[1] mango export prices are currently hovering at **~USD 2,700-2,750/MT** and are anticipated to **rise ~40–50%** in **Apr–Jun'26** as **post-peak season supply sharply tightens**, while heavy rainfall in **Piura/Motupe** reduces exportable volumes and quality, triggering **shortages** and **higher global prices.**
- **Indonesia's**[2] **Ministry of Trade** is leveraging the **Indonesia-Canada Comprehensive Economic Partnership Agreement** to establish fresh **opportunities** for **mango exports** into the **Canadian market**. The combination of **enhanced market access** and a **broader customer base** is anticipated to maintain **firm export pricing** throughout the upcoming quarter, despite seasonal constraints on export volumes remaining relatively modest.

Source: ITC Trade Map (up to Feb 2026); prices for Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates ; HS Code : 080450 Fresh and dried guavas, mango, and mangosteens
Note: AMJ stand for April, May & June 2026
Note: 1. Peruvian mango export prices ; 2. Indonesia aims to grow tropical fruit exports to Canada;

Price trends of key importing nations



- **U.S. mango import** prices expected to **firm** slightly as **Mexico's early-season arrivals** begin replacing **Peru**, tightening **transitional supply gaps**, while **steady demand** and **procurement programs** sustain gradual upward momentum.
- **Canada's mango market** relies on **overseas supply** during **winter**, with consistent demand for **Tommy Atkins**, **Kent**, and **Ataulfo varieties**. Improved shipments from **Mexico/Brazil**, ease **winter tightness**, while **stable consumption** and **diversified sourcing** prevents sharp decline, keeping the prices **modestly softer.**
- Early-season mango shipments from **Southeast Asian** exporters such as **Vietnam** and **Thailand** are expected to **increase supply** in the **Chinese market**, leading to **marginally softer prices**, while **stable** domestic demand limits significant downside movement.
- **The Netherlands** functions as **Europe's** primary distribution center for **tropical fruit re-exports**. **Strong purchasing interest** throughout **European Union markets**, combined with **extended transit times** resulting from **Red Sea disruptions**, are maintaining **mango import prices** at slightly **higher** levels during **March.**

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates ; (HSN 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.

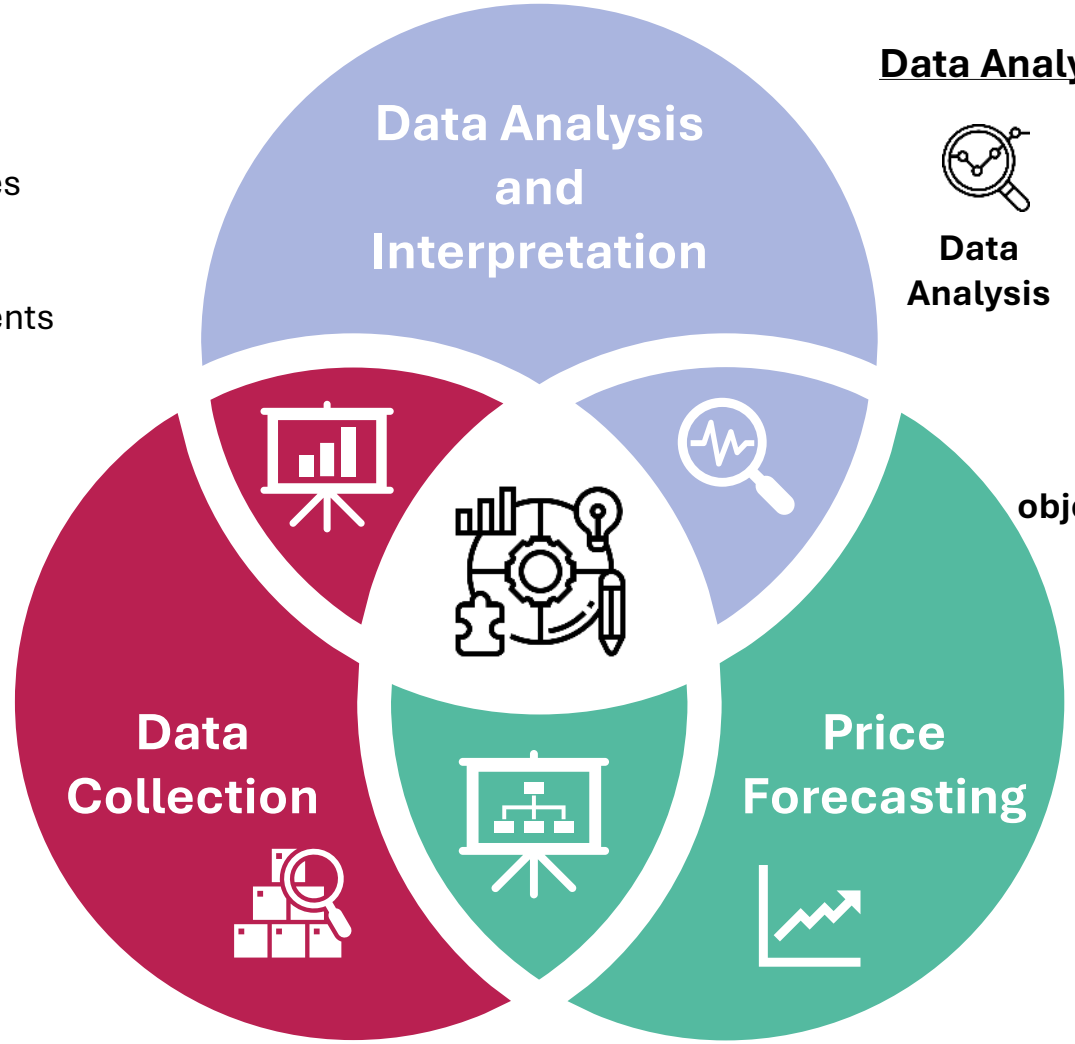
Data Collection

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 of FOB prices
- 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.