

Monthly Dashboard – Guavas, Mango, and Mangosteens

HSN Code: 080450

April-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												
China												
Indonesia												
Mexico												
Brazil												
Pakistan												
Bangladesh												
Egypt												
Vietnam												
Thailand												

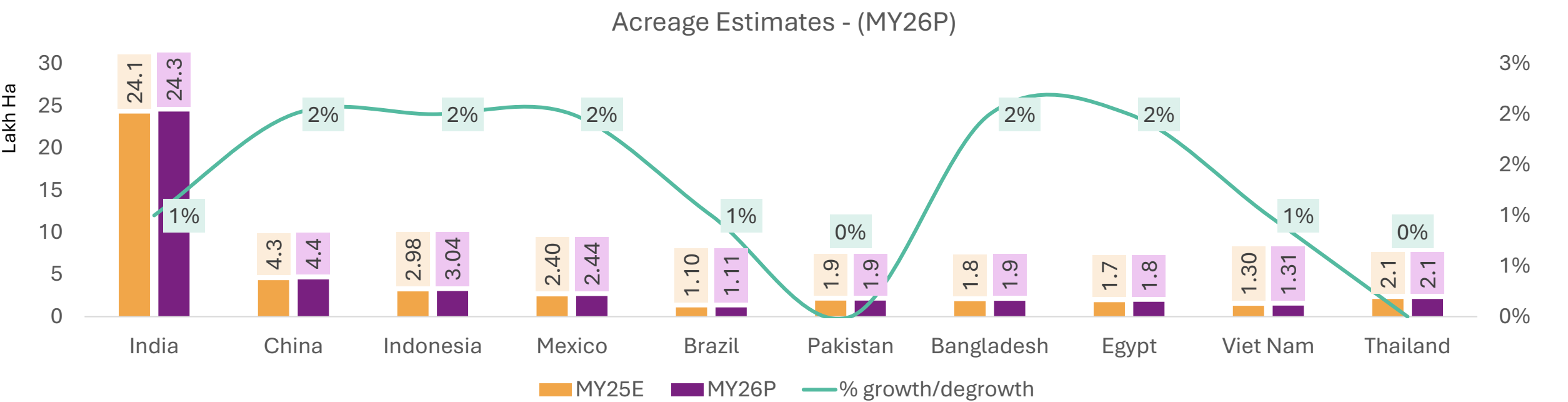
Lean season

Peak season

- The mango crop calendar across major producing countries shows that peak harvesting in India, China, Pakistan, Mexico, and Thailand typically falls between April and September.
- Indonesia and Brazil stand out with a peak season from August to January, which coincides with the off-season in other regions, providing a market advantage.
- Key mango varieties traded globally include Atulfo, Tommy Atkins, and Keitt from Mexico and Brazil; Nam Dok Mai from Thailand; Sindhri and Chaunsa from Pakistan; and Alphonso, Kesar, Dasherri, and 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

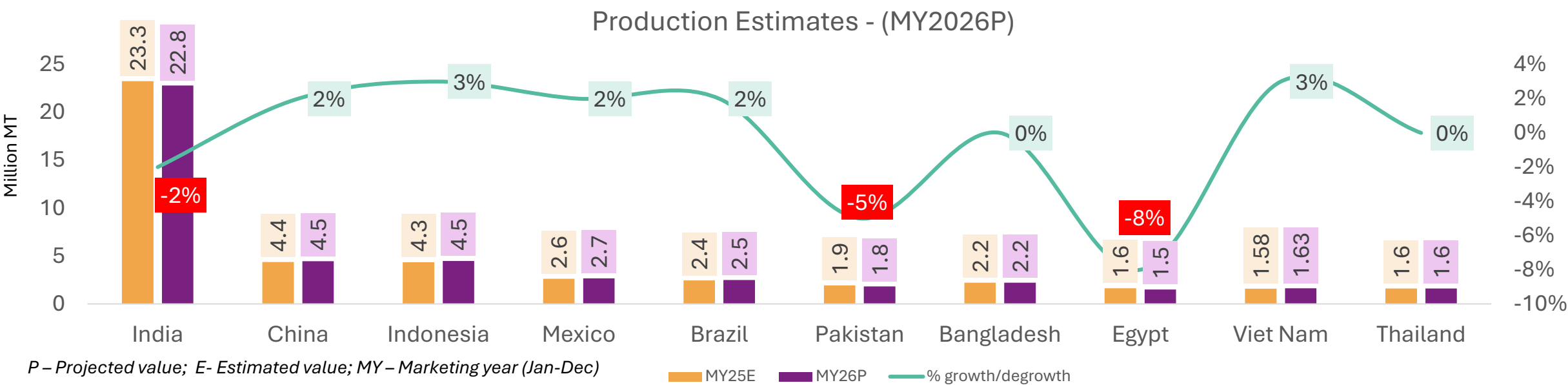


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~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.
- **Mango cultivation area in Indonesia** is expected to **grow YoY**, supported by a **CAGR of ~15% in exports from MY19 to MY25** and a **~5% increase in household share of mango consumption**, reflecting **rising domestic demand** and **better 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 expected to remain the key drivers in **MY26P**.
- Brazil is projected to **expand mango acreage marginally ~1% in MY26P**, driven by strong exports in 2025, wherein mango topped the fruit exports in the country.

Source: FAOSTAT; MY25 acreages are estimates and MY26 figures are 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



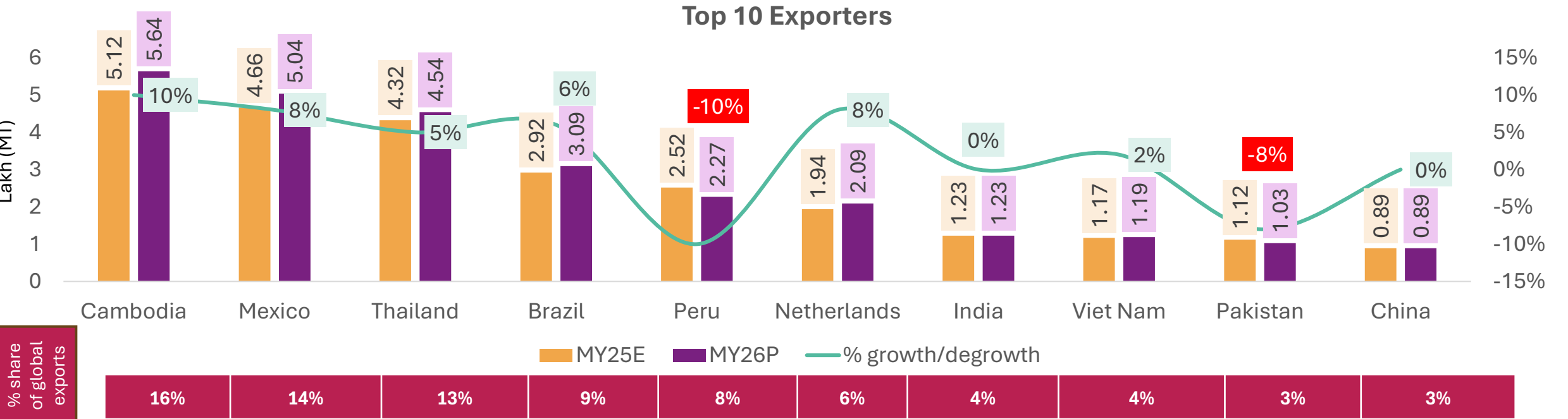
- The countries in the chart **contribute to ~76% of global mango production**. Production for MY26P is expected to **moderately improve by ~1-2%** led by Indonesia, China, Brazil and Mexico while countries like India, Pakistan, and Egypt is expected to witness downtrend in production.
- **Mexico’s¹** mango production in **MY26P** is expected to **inch-up (~2%)** supported by **strong orchard management**, though **excess rainfall in Chiapas**, and **Oaxaca** has limited strong productivity gains.
- **Indonesia’s** mango production is expected to **increase** by **~3%**, supported by **improving commercial demand** of premium varieties such as **Gedong Gincu** and **better orchard management** practices (reducing fruit fly contamination).
- **Brazil’s²** mango production is expected to recover from the previous season, supported by improved yields of Tommy Atkins and Palmer varieties in São Paulo, resulting in an estimated 2–3% increase in output.
- **Mango production in Egypt³** 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’s⁴** production is projected to decline by ~1–2% in MY26P, as unseasonal rains during the flowering stage have reduced export-grade output.

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. Trade Estimates

A large container ship is shown from an aerial perspective, sailing on a deep blue ocean. The ship's deck is covered with numerous colorful shipping containers in shades of red, yellow, blue, and green. The ship has a white superstructure and a dark hull. In the background, a smaller ship is visible on the horizon under a clear sky. The text "Export Trends and Price Outlook" is overlaid in white on the ship's deck.

Export Trends and Price Outlook

Major Exporters Of Mangoes

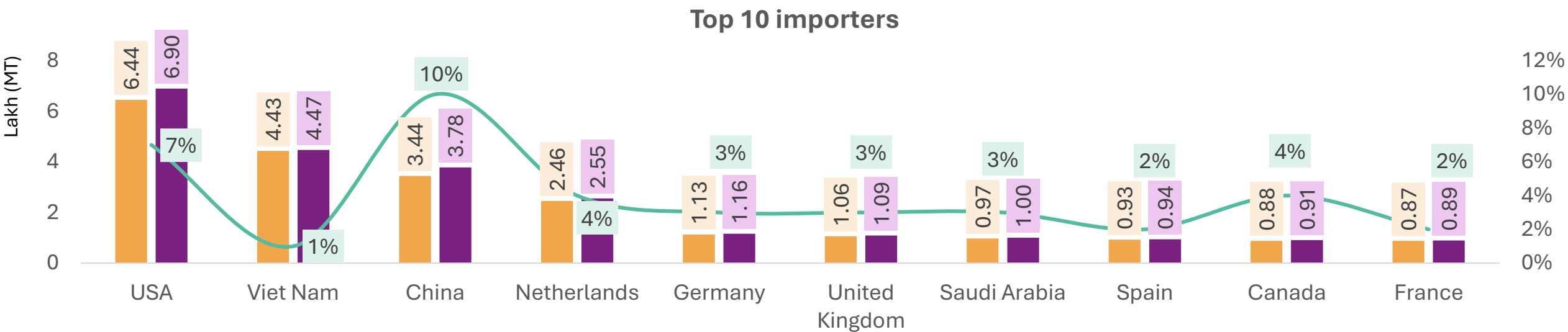


P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec)

- The countries listed above account for ~80% 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.
- Brazil’s¹ MY26P exports are projected to grow by ~6% YoY**; however, gains are constrained by heavy rainfall in the São Francisco Valley (accounting for ~90% of exports), which has impacted fruit quality and diverted nearly 60% of production to domestic markets. Additionally, anthracnose incidence has limited exportable volumes of Tommy Atkins and Palmer varieties.
- India² accounts for ~30–35% of global mango production**; however, **exports remain structurally low (~1% of production)** due to **high domestic consumption, logistics constraints** (high logistics costs, weak cold chains), and **stringent export-quality requirements**.
- Peru’s mango exports are estimated to decline by ~10% in MY26P following the MY25E season**, which ended ~22% lower YoY due to **plant stress, lack of cold weather affecting flowering, and rainfall in Motupe and Casma**. Although **El Niño risk in Piura** is expected to **decrease**, it will still cause ~10% decline in exports for MY26P.

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. [Brazil’s export momentum](#); 2. [India’s mango momentum](#);

Major Importers Of Mangoes



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

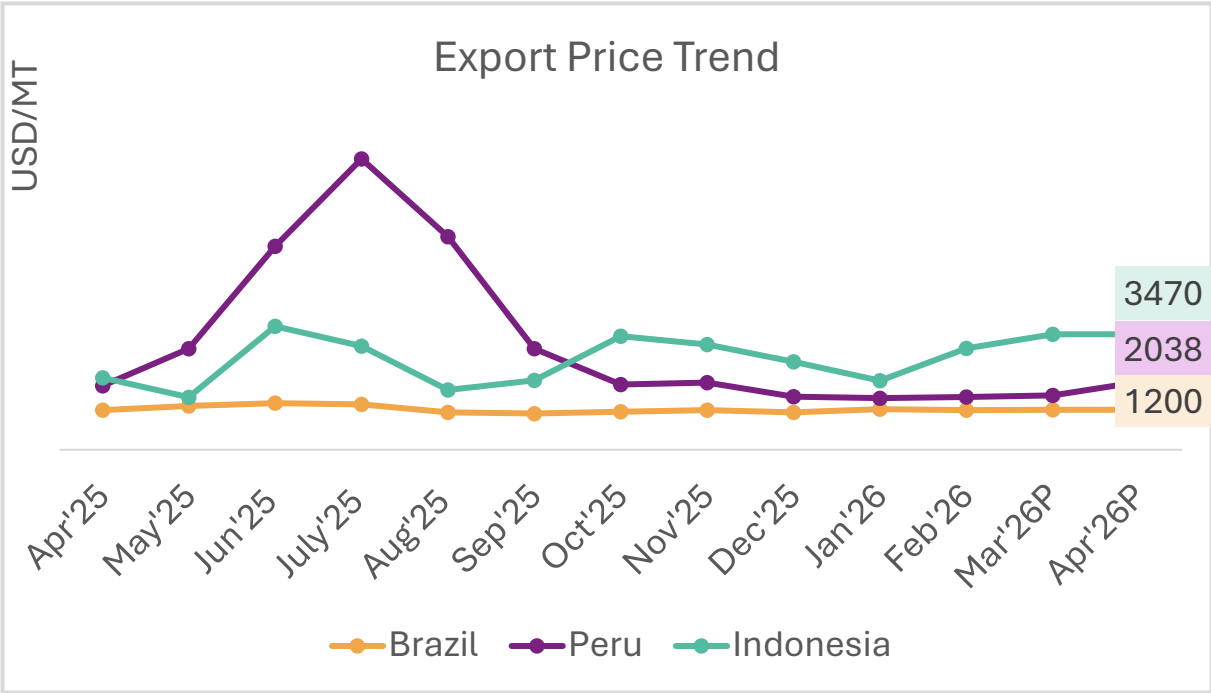
MY25E MY26P % growth/degrowth

% share of global imports	21%	14%	11%	8%	4%	3%	3%	3%	3%	3%
---------------------------	-----	-----	-----	----	----	----	----	----	----	----

- The countries in chart **account for ~73% of global mango imports**. Mango imports grew at a range of ~8-9% in past decade, from **MY15 to MY25E**.
- **Netherlands' mango imports¹** in **MY26P** are expected to **increase** by ~4%, driven by its **86% intra-Europe redistribution role** — with **Brazilian Palmer** and **Keitt** anchoring steady supply as **West African volumes remain constrained**.
- **China's mango imports** are projected to **increase**, supported by **rising health-conscious consumer preferences, expanding urban populations, and strong retail sector growth**, all of which boost demand for nutrient-dense tropical fruits.
- **Germany's²** mango import volumes are maintaining their **strength**, underpinned by **consistent European demand** and the **reliable supply** of commercially viable mango varieties.
- **Spain's³** mango imports are **rising modestly (~2%)** as **increased Latin American** inflows support supply; the country imported **0.9 LMT** worth **€86.5 Mn**, 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. [Netherlands' mango import](#); 2. [Mango Crop Report](#); 3. [Spain's mango imports](#)

Export Prices Forecast



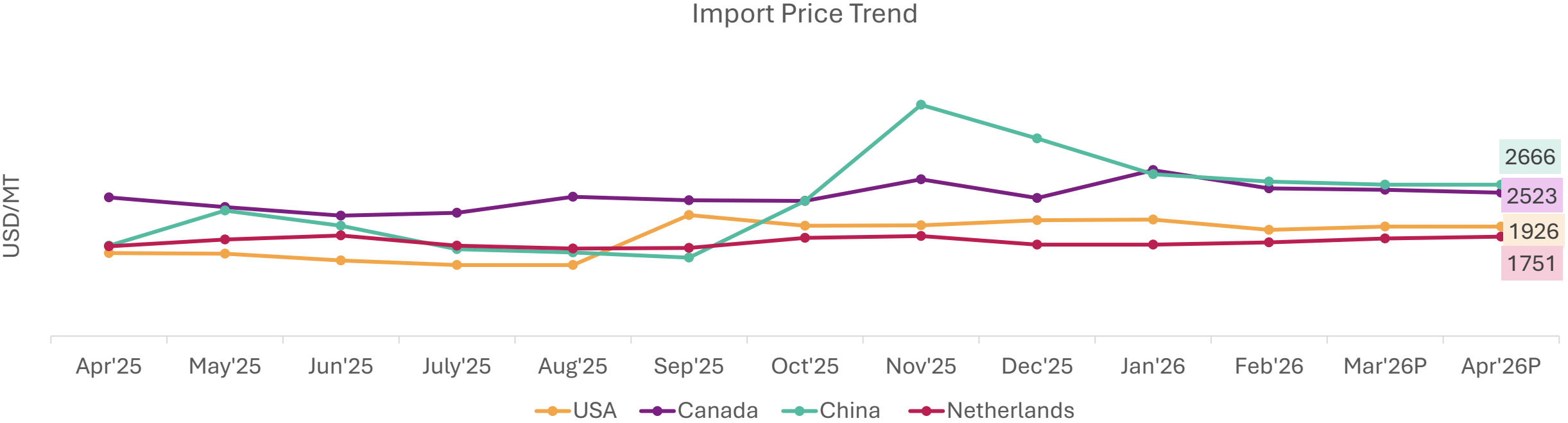
Price outlook for next quarter (MJJ) 2026					
Countries	Apr'26P Price (USD/MT)	Apr'25 Price (USD/MT)	%age change	Price direction	Average forecasted price range for MJJ (USD/MT)
Brazil	1200	1190	1%	Bearish	1120-1180
Peru	2038	1920	6%	Bullish	2840-3000
Indonesia	3470	2160	61%	Bearish	3130-3190

- **Brazil’s** mango export prices **remained broadly stable in Apr’26 (MoM)**; however, prices are expected to **soften** moderately, as **lean-season supply** overlaps with **rising acreage and exports**, while **Mexico** captures key markets (**USA, Spain, Netherlands**), keeping **global demand well-supplied**.
- **Peru’s¹** mango export prices are estimated to have risen by **~25% MoM** from **March to April’26**. As harvests in **Casma** and **Motupe** slow down, **supply drops sharply**, while **Easter demand peaks**, driving prices higher due to **limited availability**.
- **Indonesia's** export prices **surged 61% YoY** to **~ USD 3,470/MT** in **Apr’26P**, driven by **peak-season tightness** — however, as **seasonal volumes normalize** and **broader supply returns** to market, prices are expected to **soften** to **~USD 3,130-3,190/MT** in upcoming quarter **MJJ'26**.

Source: ITC Trade Map (up to Feb 2026); prices for Mar and Apr 2026 are estimated based on seasonal patterns, trade trends and trade estimates ; HS Code : 080450 Fresh and dried guavas, mango, and mangosteens
Note: 1. [Peruvian mango export prices](#)

Note Price forecasting is based on the fundamental analysis. MJJ stands for May, June, and July 2026.

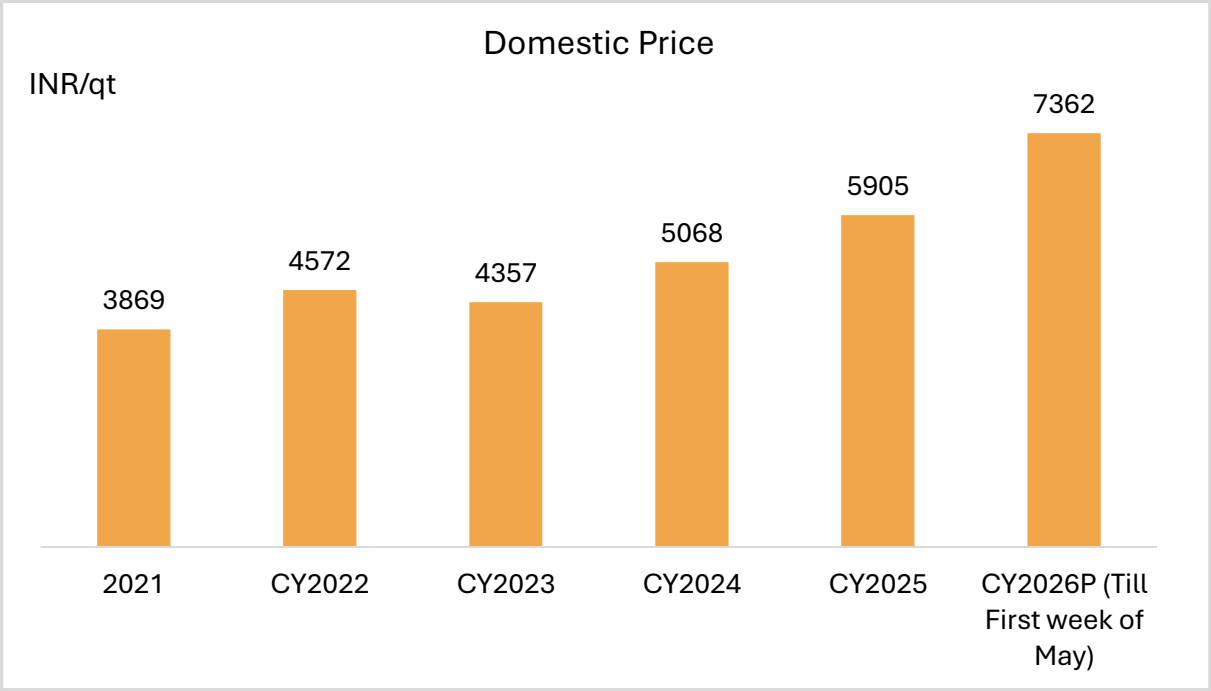
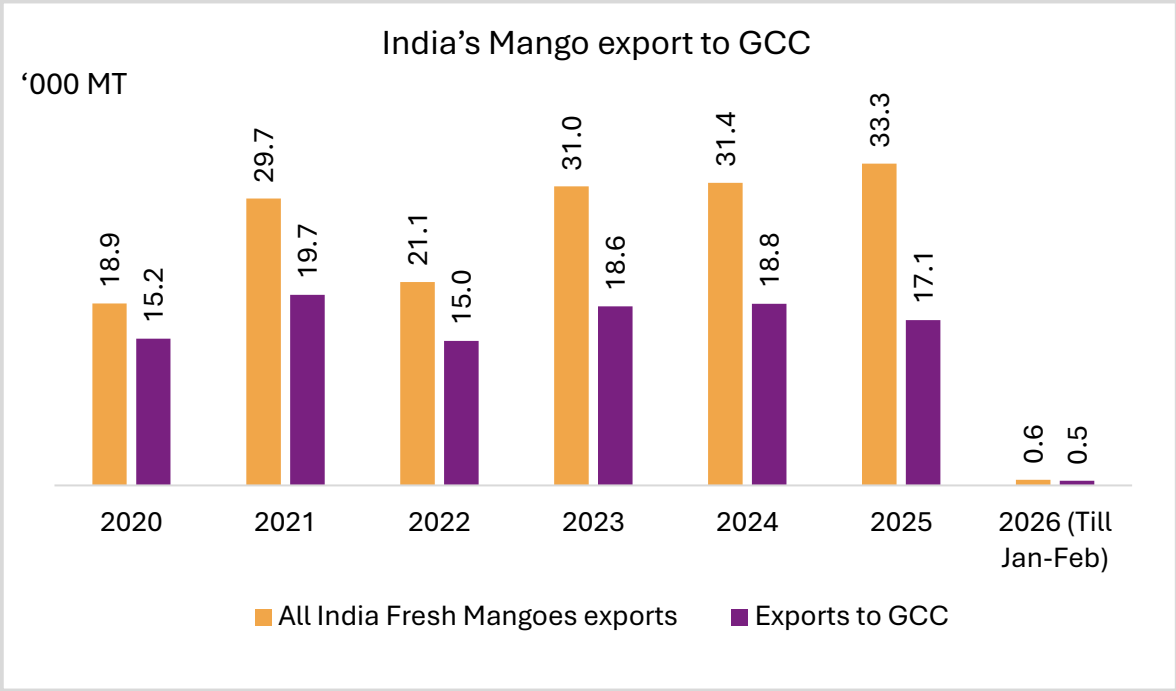
Price Trends Of Key Importing Nations



- **U.S. mango import prices** are anticipated to **firm slightly** as **Mexico’s early-season arrivals** begin to **replace Peruvian supplies**, narrowing transitional supply gaps, while **steady demand** and **procurement programs** maintain a gradual **upward trend**.
- **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 over the previous month (Mar’26-Apr’26P)**.
- Early-season mango shipments from **Southeast Asian** exporters such as **Vietnam** and **Thailand** are anticipated to **increase supply** in the **Chinese market**, causing **prices to soften slightly**, while stable domestic demand restricts any major downward 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 **April’26**.

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

Impact On India's Annual Mango Exports To Gulf Countries Due To West Asia Conflict



- India's fresh mango exports grew from **18,858 MT (2020)** to **33,331 MT (2025)**, driven by rising global demand, though exports remain just **1–2% of annual production**.
- The **GCC** accounts for **~51% of exports in 2025**, down from **~81% in 2020**, with the **UAE** alone representing **~39%**. Diversification into **Nepal (~17%)**, **UK (~14%)**, and **USA (~7%)** mitigates broad-based export disruption risks.
- Smaller GCC markets—**Qatar (~4%)**, **Oman (~3%)**, **Kuwait (~3%)**, and **Saudi Arabia (~1%)**—further limit direct exposure to conflict-sensitive regions.

- Unseasonal rains during flowering** reduced **fruit retention**, causing **Alphonso** to **decline 40-50%** and **Kesar/Banganapalli** by **~20–30%**, mainly in **Maharashtra, Gujarat, Rajasthan, and Karnataka**, with **Kesar harvest delayed by two weeks¹**.
- Due to lower volumes, farm-gate prices have risen sharply compared to last year (Apr'25-Apr'26):**
 - a) Alphonso at ₹1,000–1,150/dozen (vs ₹720–750)
 - b) Banganapalli/Badami at ₹4,000–4,500/quintal (vs ₹2,700–3,000),
 - c) Kesar at ₹11,000–13,000/quintal (vs ₹7,000–8,000), shielding traders from major losses.

Source: Export figures have been considered from APEDA; Source 1: Industry interactions.
Domestic prices of mango have been sourced from AgMark, prices for CY26P are trade estimates through primary interactions.

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.

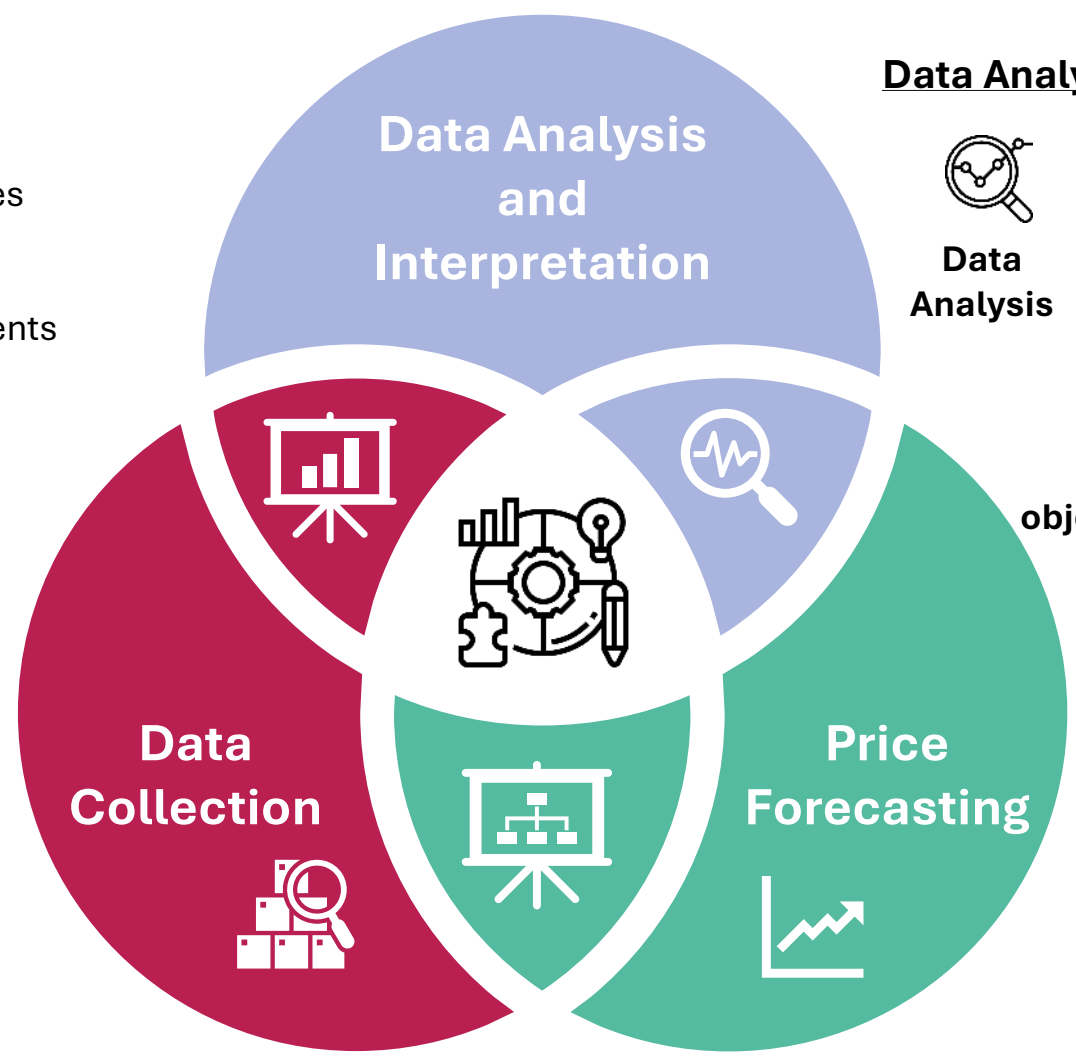
Data Collection

- 

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.