

Monthly Dashboard – Guavas, Mango and Mangosteens

HS Code: 080450

May 2026

Acreage and Production Trends



Mango Crop Calendar of Major Producing Countries

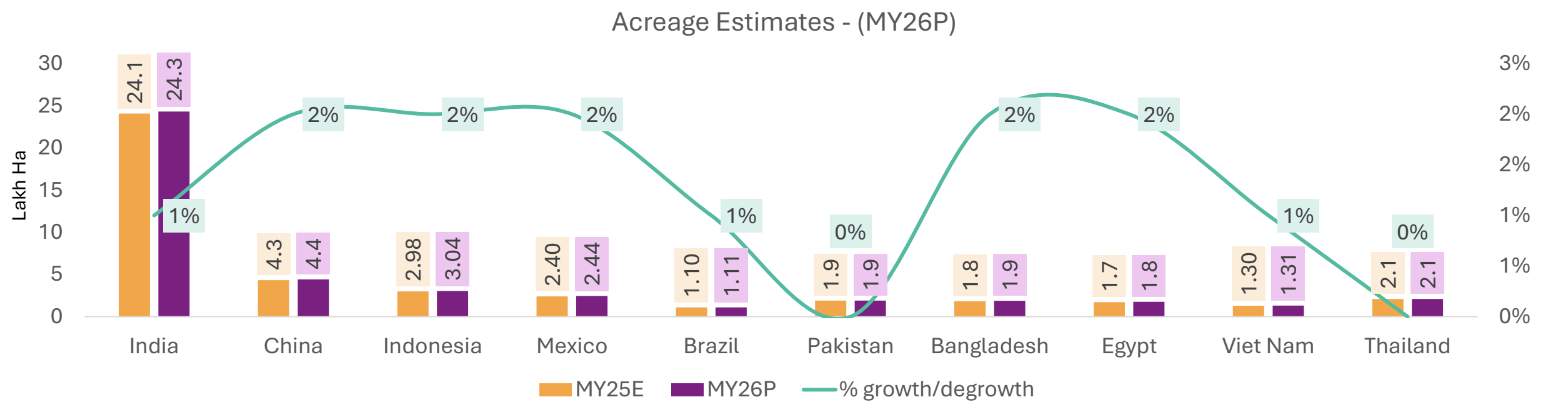
Countries	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
India												
China												
Indonesia												
Mexico												
Brazil												
Pakistan												
Bangladesh												
Egypt												
Vietnam												
Thailand												

Lean season		Peak season	
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- 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 December, which coincides with the off-season in other regions, providing a market advantage.
- Major mango varieties in global trade 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 the year globally, and the crop calendar varies by country. The marketing year is January–December.

Acreage Estimates of Major Producing Countries



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

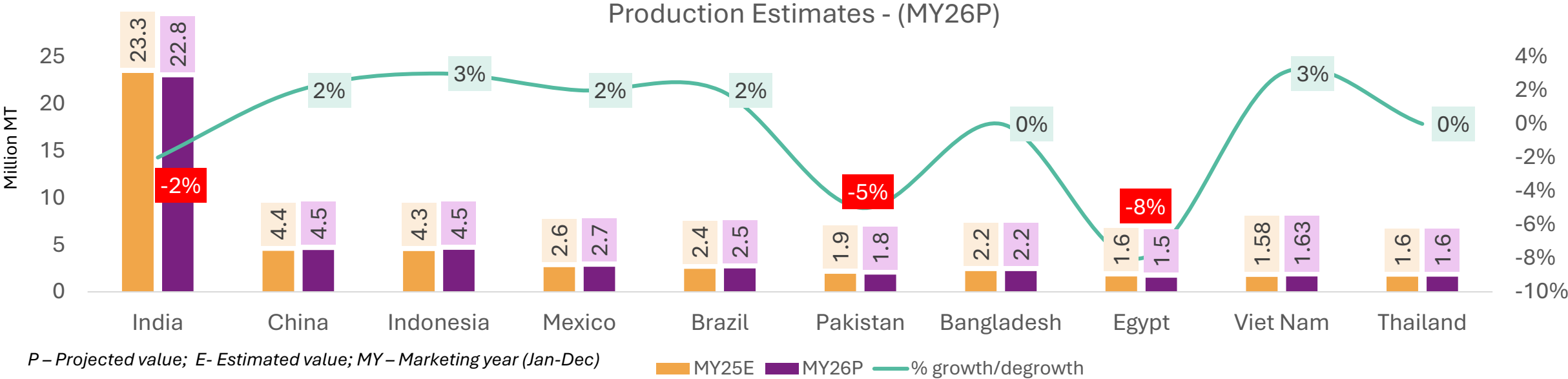
- The countries in the chart **account for ~65% of global mango cultivated area**. For MY26P, global acreage is set to rise moderately by **1-2% YoY**, led by **India, China, Indonesia, Mexico, Brazil, Bangladesh, Egypt**, and **Vietnam** while other countries are likely to remain stable.
- **Mango¹ cultivation area in Indonesia is projected to increase by about 2% YoY**, supported by strong export growth (with exports expanding at roughly 15% CAGR over MY19–MY25) and a ~5% rise in the share of households consuming mangoes, reflecting strengthening 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 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, during which mango emerged as the country’s leading fruit export.

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

Abbreviations used:

- YoY: Year on year
- CAGR: Compound annual growth rate

Production Estimates of Major Producing Countries



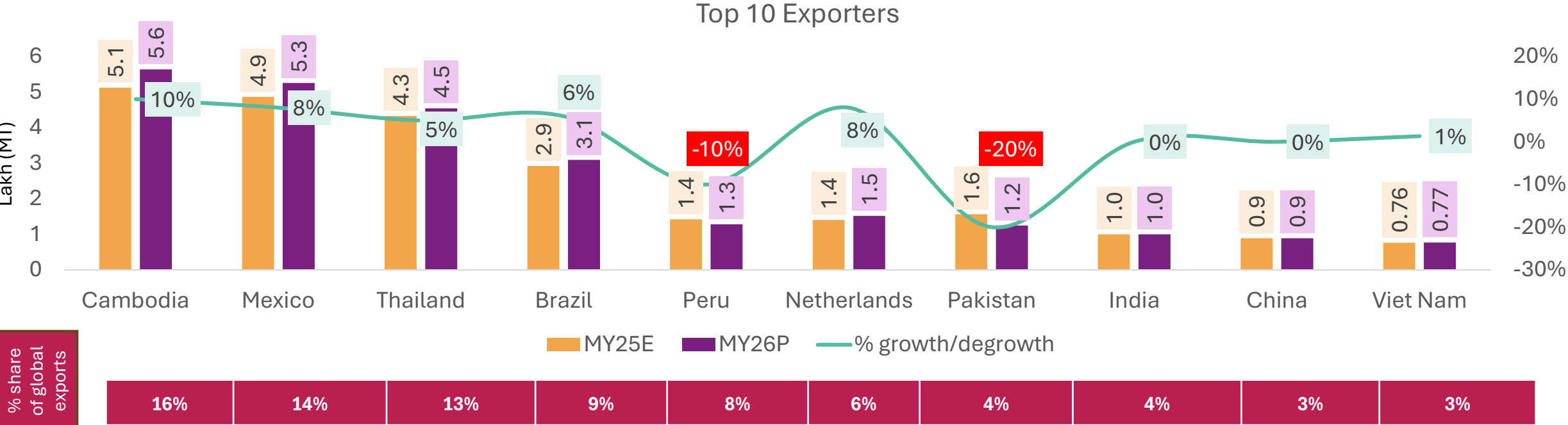
- The countries in the chart **contribute to ~76% of global mango production**. Production for MY26P is expected to **moderately improve by ~1-2%** led by Indonesia, China, Brazil and Mexico while countries like India, Pakistan, and Egypt are expected to witness downtrend in production.
- **Mexico’s¹** 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% 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

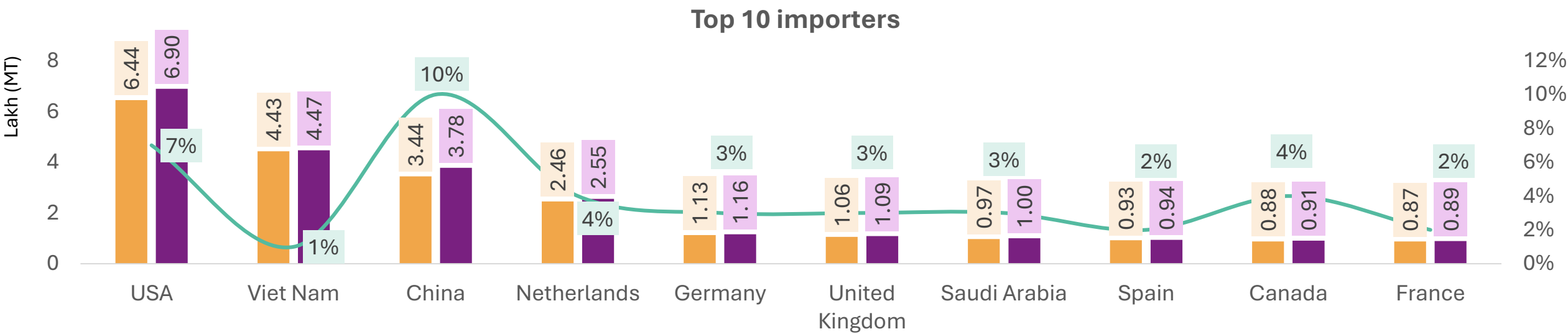


P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec)

- The countries listed above account for ~80% of global mango exports. In **MY26P**, exports are expected to **grow ~3-4% Y-o-Y**, driven by higher volumes from **Cambodia, Mexico, Thailand, Brazil, and the Netherlands**, while declines in **Peru and Pakistan** may offset some of the gains.
- Pakistan’s**¹ mango exports face a projected **~20% decline** as **West Asia disruptions hit Gulf, Iran and Afghan markets**, which absorb **~80% of shipments**. **Freight costs** surged from **~USD 1,400 to ~USD 6,000–7,000 per container**, while **inflation** weakened **domestic demand**.
- India’s** mango exports to **Japan** face **suspension** after **VHT inspections** found **fumigation gaps**, raising **phytosanitary risk** to a **~USD 1.54 million market**. With **Japan** accounting for just **~1-2% of India’s mango exports**, overall **MY26P volumes stay flat at par** with **MY25E** despite this setback, **heatwave-linked crop damage**, and **elevated freight costs**.
- 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 **moderate**, **lingering warm weather effects** and **rainfall variability** are likely to continue **disrupting flowering** and **fruit set**, limiting yields and exportable volumes.

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

Major Importers of Mangoes



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

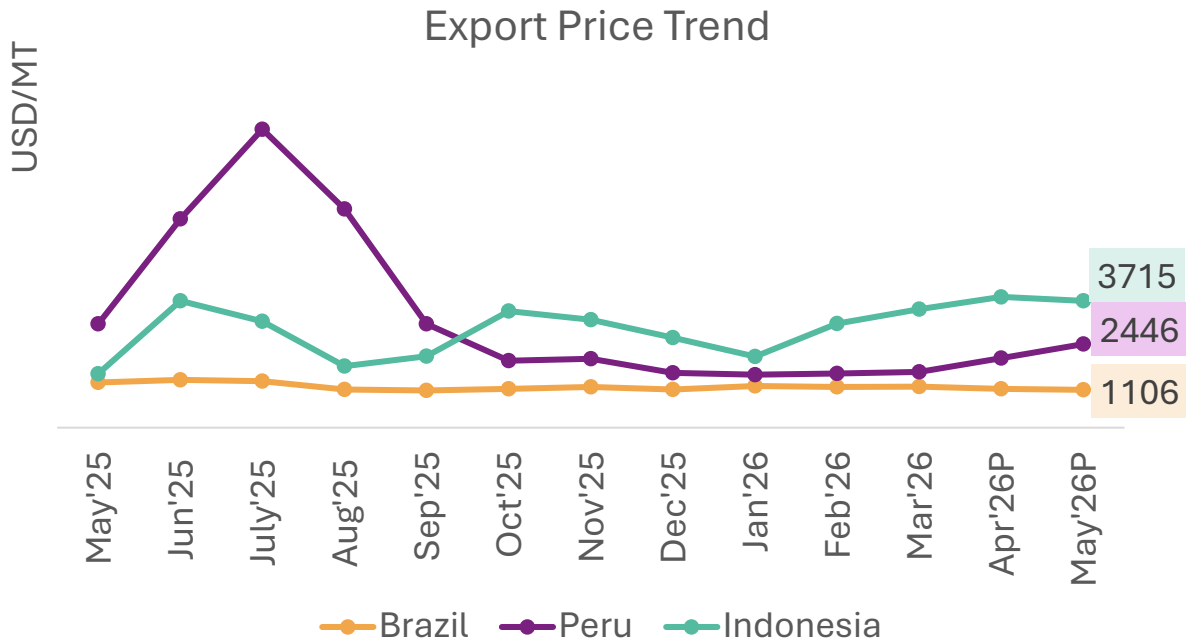
MY25E MY26P % growth/degrowth

% share of global imports	21%	14%	11%	8%	4%	3%	3%	3%	3%	3%
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- The countries in chart **account for ~73% of global mango imports**. Mango imports grew at a **CAGR 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**.
- **USA²** mango imports are anticipated to grow by ~7% in **MY26P**. Select promotional initiatives such as India’s “**Mango Magic**” campaign have supported demand at the margin. **Costco’s initial Kesar shipments** sold out within **two hours**, while total US mango export **value** reached ~**USD 10.8 million** in **FY25** (up 148% from **USD 4.36 million**).
- **Germany’s³** mango import volumes are maintaining their **strength**, underpinned by **consistent European demand** and the **reliable supply** of commercially viable mango varieties.
- **Spain’s⁴** mango imports are **rising modestly (~2%)** as **increased Latin American** inflows support supply; the country imported **0.9 LMT** worth **€86.5 Mn** in **MY25**, 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. [USA mango’s Imports](#) 3. [Mango Crop Report](#); 4. [Spain’s mango imports](#)

Export Prices Forecast



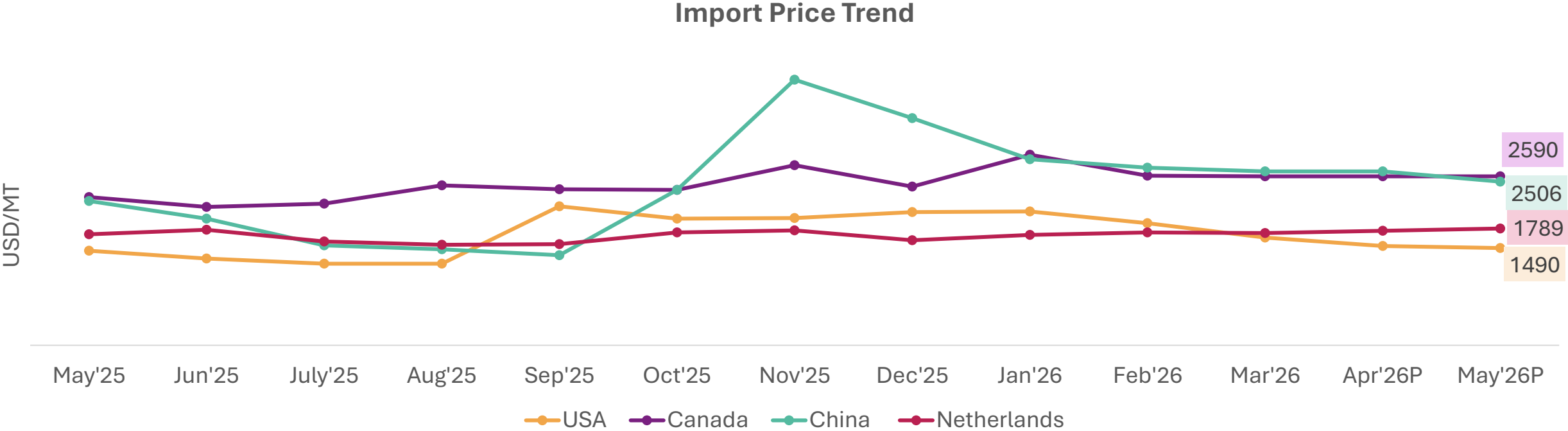
Price outlook for next quarter (JJA)					
Countries	May'26 P Price (USD/MT)	May'25 Price (USD/MT)	%age YoY change	Price direction	Average projected price range for JJA (USD/MT)
Brazil	1106	1320	-16%	Bearish	1040-1100
Peru	2446	3040	-20%	Bullish	2910-2970
Indonesia	3715	1580	135%	Bearish	3370-3430

- Brazil’s** mango export prices **dropped by ~3% in May’26 (MoM)**; however, prices are expected to **soften** moderately in the upcoming quarter **JJA’26**. With **Brazil’s** peak **harvesting season** set to begin from **August** onward, increased **fresh arrivals** are likely to outpace **demand**, placing **downwards pressure** on export prices.
- Peru’s¹** mango export prices are estimated to have **risen ~20% MoM in May’26P**, driven by **end-of-season scarcity** as **Casma** and **Motupe** harvests **slowed**. Sharply **lower exportable volumes** left buyers competing for **limited late-season fruit**, supporting **higher prices**.
- Indonesia's** export prices **surged 135% YoY** to **~USD 3,710-3,720/MT in May’26P**, driven by **peak-season tightness** — however, as **seasonal volumes normalize** and **broader supply returns** to market, prices are expected to **soften** to **~USD 3,370-3,430/MT in upcoming quarter**.

Source: ITC Trade Map (up to Mar 2026); prices for Apr and May 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.
JJA stands for June, July, & Aug 2026

Price Trends of Key Importing Nations



- **U.S. mango import prices** are anticipated to **decline slightly MoM** in **May'26P** as **Mexico's early-season arrivals** replace **Peruvian supplies**, however, **prices** are expected to **trend sideways** over the **following months** as **steady demand** and **procurement programs** continue.
- **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** to prevent a sharp decline, keeping the prices **stable over the previous month (April-May'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 **May'26P**.

Source: ITC Trade Map (up to Mar 2026); prices for April and May 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.

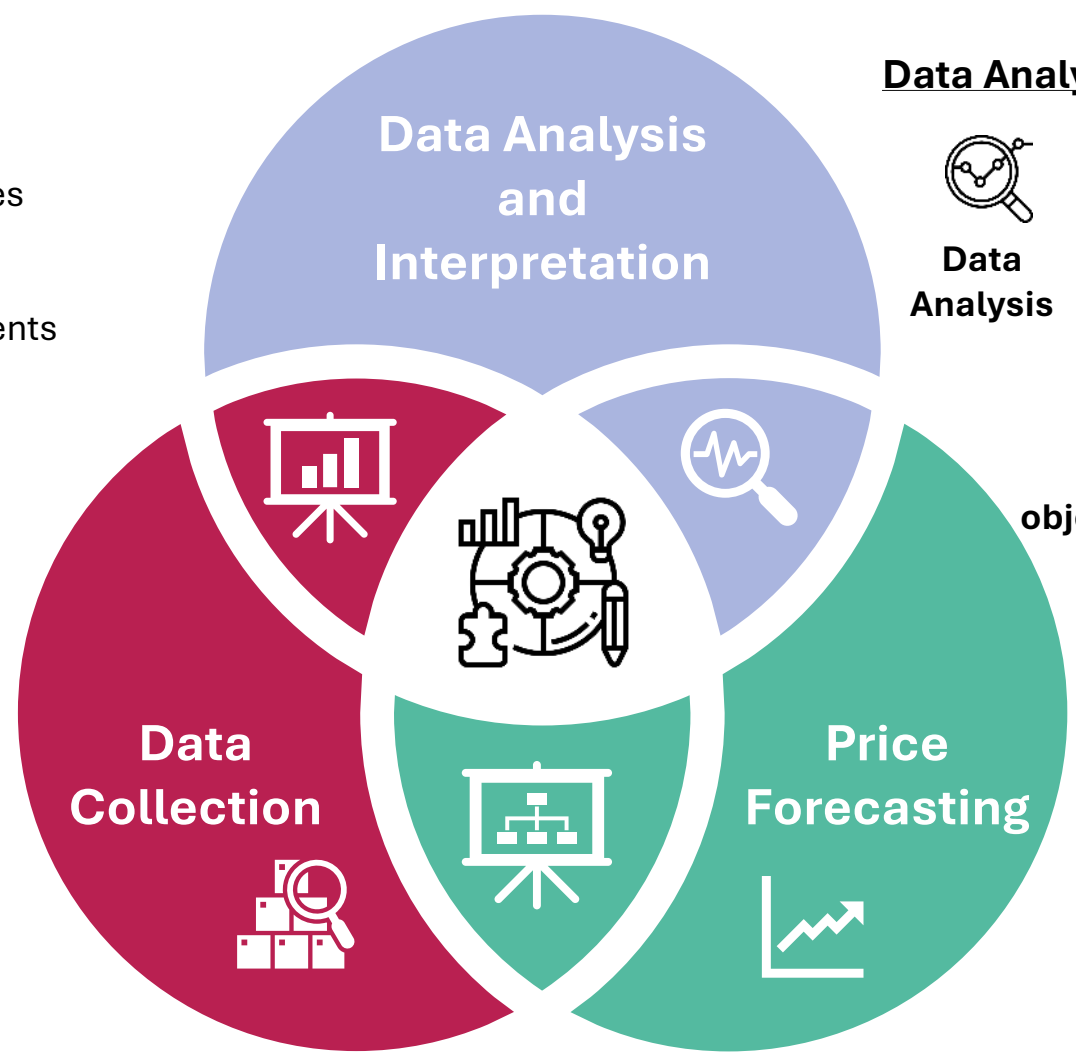
Data Collection

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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 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.