

OVERVIEW GLOBAL MANGO MARKET

The European market is mainly getting its mango supply from Africa at this time of the season. Besides some irregularities in Ivory Coast, the African seasons are developing quietly. In the United States, importers are mainly looking south. The Latin American and southern neighbours are the main importing countries. In the field of production, there is a lot going on in this area. Peruvian exporters aim for an earlier start of the season, to the annoyance of Brazilian exporters. This last group complains about the poor quality of the Peruvian mangoes with the early start of the season.

Brazil: Drought reduces harvest, but new plantings compensate

The South American country hits the market in August, with a peak between September and October/November; however, the sector in the country is complaining about Peruvian competition trying to take advantage of the good prices paid in Europe in this period. Those mangoes, which according to Brazilian producers are harvested too early, are said to ruin the end of the Brazilian season.

An exporter explains that they ship mainly the Keitt, Kent and Palmer varieties, but they also supply Tommy Atkins; however, the European market has a preference for Kent and Keitt. The Palmer has been becoming more popular in recent years. The country is able to grow this variety all year round.

Weather conditions such as the drought in the northeast of the country have had a negative impact on this season's volumes. However, this negative effect has been partially offset by the new plants that have come into production. Exact estimates are not yet available, but there are talks of a volume reaching 150,000 tonnes. In any case, the drought in the north could still take a negative toll. Lately there has been little rainfall, which results in little water being available for irrigation.

Early season start in Peru problematic for world market?

Peruvian growers are preparing for an early start of the season. With this, traders want to take advantage of the good prices that are paid on the European market. That period with good prices lasts from October to early December. A few years ago, the season kicked off in January, but with a stop-over in December, the season's start has been brought back to November. This has pushed Brazilian

exporters from the market, who accuse the Peruvians of marketing unripe fruit and thereby corrupting the marketplace.

A British importer also complains about the recent Peruvian season. Due to the early start, the mangoes overlapped with the Brazilian production. "Peru did not manage the export very well. There are too many exporters and a huge volume in a short period," said the trader.

Mexico focuses on North American markets

The season peak falls in the summer months. This is a favourable position for traders, as demand in those months also peaks. The most important sales markets are the US and Canada, with a small volume going also to the world market.

The organic market continues to grow. The production of bio mangos is increasing every year. The choice for varieties also depends on the region. In general, the Tommy Atkins and Ataulfo are the most common. The season kicks off with the Ataulfo, followed by Tommy Atkins, Keitt and Kent. Supermarkets in the US, however, seem to have no real preference when it comes to varieties.

The season starts in February and lasts until September. Making a comparison with the previous season is difficult. Last year, there was a small supply of organic mangoes in April. This year, the supply is smaller, but there is sufficient product available and the figures will logically increase.

Dominican Republic expects a good season

The Caribbean island makes shipments to markets in the US, Europe, the United Kingdom, the Caribbean and Canada. In addition to these exports, some of the fruit is distributed in the domestic market. The season lasts from March to August. This year, the island expects a larger volume due to the adoption of various measures. Growers have been getting more advice and the weather has also contributed positively.

Kenya focuses on the Middle East

The Kenyan season has finished very recently. The country is focused on exports, mainly to the United Arab Emirates. That's a good market for the Apple Mango, but at the same time, there is competition from Egyptian mangoes. According to an exporter, Egyptian mangoes are often 50% cheaper. The Egyptian sector has a logistical advantage for markets in the Middle East, explains an exporter.

Countries in West Africa, like Ghana, also compete against the Kenyan mangoes. The European market is still out of reach for this exporter, as they still lack the necessary certificates. There should also be a greater focus on the Keitt and Kent, which are the most popular varieties in Europe.

China: Greater volume does not put prices under pressure

The most important production regions for mangoes are Sanya, in the Hainan Province, Baise, in the Guangxi Province, the Yunnan Province and Panzhihua, in the Sichuan Province. The season in Hainan begins in April. At the moment, the market is good. Domestic revenue is 10% higher than last year and the fruit has a good quality. The weather is stable. Despite the higher volume, prices for premium mangoes have increased by 30%. This concerns mainly the Guifei, or Red Dragon variety.

In addition to domestic cultivation, there are imports from South East Asia and recently also from Ecuador. The large volumes from Asian countries compete against the domestic production. Production costs in Thailand, Malaysia, Indonesia, Philippines and Vietnam are lower than in China.

India invests in exports

This year, four new countries have been added to the export list. India was granted access to Australia, South Korea, China and Iran. Each country has its own protocols and requirements for exports, but since the export in India is controlled by a single organization, those requirements can be met.

Spain seeks to extend the season

The season starts in September, so it's too early to get good estimates. In a first forecast, however, a comparable volume to that of the previous year is expected. With a market share of 75%, the Osteen is the most popular variety, followed by the Keitt. The volumes of Tommy Atkins and Kent remain stable, but there are no new plantings of these, as new varieties are being used with the goal of extending the season, although that is a long-term process.

In addition to the domestic production, there are imports available from Ivory Coast, Mali, Senegal and Burkina Faso. The market remains stable and in good balance. Over the last 3 to 5 years, the consumption of mangoes has grown in the southern European country. There has also been an increase in the supply of freshly sliced mango and juices. Also, Malaga's production has gained a firm foothold in the European markets.

Belgium: Many countries on the market

At present, there is supply from many different countries on the market. The latest Keitt from Costa Rica are now arriving. Besides, the season has just started in Mali. The African country begins the campaign with Kent, followed a few weeks later by the Keitt. An importer reports that they expect weekly shipments from this country until the end of June. Neighbouring Ivory Coast is still on the market with good volumes. Although the harvest in the West African country has already been completed, the last containers will arrive on the Belgian market at the end of the month. Other countries in West Africa, such as Gambia and Senegal, have also started the season with Kent mangoes. The first mangoes from these countries are expected to arrive in week 24, with weekly shipments continuing until August.

In addition to the mangoes that are shipped by sea, there are also air shipments of tree-ripe mangoes available, namely of Kent mangoes of calibres 10 to 12. The end of the season is in sight.

Netherlands: Growing demand awaiting African mangoes

The insurgency of military forces in Ivory Coast entailed difficulties for mango exports last month. In the meantime, the country has stopped loading and the African supply will come from Mali in the next four weeks. The prospect is for the Kent Mango season to be over soon and be quickly followed by the Keitt. The quality from Ivory Coast was not great, as some of the mangoes arrived already ripe, making the market reluctant to buy the fruit. But there are prospects for a rapid increase of the demand, also because the supply from South American countries is quite limited. After the Mali season, Senegal will be on the market until the end of August.

Italy: Summer months: a good or a bad market?

The Italian mango market is divided into three categories: there are mangoes imported by ship that are marketed directly, especially by caterers and discounters; shipments that are imported and ripened, and lastly, tree-ripened mangoes that are flown in by air. The opinions about the market are as diverse as these categories.

The summer months, according to a trader in Bologna, are not the most ideal for the mangoes. The domestic summer fruits that are on the market in those months push the mangoes off. Imports are therefore limited during this period, with prices amounting to around 5 Euro per kilo. During the winter

months, those prices reach up to 10 Euro per kilo. The Tommy Atkins is the one usually flown in from Mexico, and the same variety is also imported by air from Africa, Mali and Ivory Coast.

A wholesaler in Naples, specialising in tropical fruit, argues the opposite. According to him, the months of May to September are ideal for the marketing of this tropical fruit. After the Peruvian season, the importer switches to Tommy Atkins mangoes from Brazil at a price of 10 to 12 Euro per box. The company also imports Kent mangoes from South Africa and Ivory Coast that reach 40 to 50 Euro per box.

US: Far less supply from Mexico

Brazil, Mexico, Peru, Guatemala, Ecuador and Nicaragua are the main mango suppliers for the US market. The Mexican season started early this year with large volumes. Although the volume should have increased in the last five weeks, it has actually remained stable. This means that there is a smaller volume available than usual, according to an importer. There are about one million boxes less per week available. For the next few weeks, the importer is concerned about the supply. The delay is mainly due to cold weather in the Mexican regions of Nayarit and Sinaloa. According to the same trader, there is a lot of room for growth in the market, but more promotional campaigns about the fruit's qualities will be necessary in order to achieve this.

Russia prefers red mangoes

Although Russia is a challenging market, given the economic situation in the country, there are still exporters who are shipping mango to this destination. An American exporter says that the Russian consumer has a preference for red mangoes. At least 65% of the shell must be red. That immediately determines the choice in terms of varieties. For example, the Kent is usually not red enough for the Russian market. Due to the economic situation, demand for mangoes has fallen. However, the tropical fruit is perceived as a luxury product.

Australian exports on the rise

The domestic harvest kicks off in September, after which the domestic product remains available until March. At this time, small volumes are imported from Mexico. This year, the borders have opened for the first time to mangoes from India.

As regards exports, Australia has a list of 25 countries that buy the fruit. Most of the volume, about 80%, is intended for markets in South East Asia, such as Singapore and Hong Kong, the Middle East and New Zealand. Exports have increased in recent years, with markets like the US and South Korea being particularly appreciated by exporters.

The sector is investing in research into several new varieties. Over the past 15 years, the Calypso and Honey Gold have proven their worth in the domestic market.

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