

Fresh fruit and vegetables:

The EU market for mango

Publication date: April 2009

Report summary

This CBI market survey discusses the EU market for mango. The main findings are listed below.

- Consumption of mango in the EU has among the lowest consumption levels in the world, but the EU market is growing quickly. Between 2003 and 2007, consumption increased 7% in value annually. According to projections from the FAO (2006), net import volume into the EU is expected to grow 2.5% per year until 2014.
- The United Kingdom (UK), Germany and Belgium recorded highest growth rates in apparent consumption, while in Portugal it decreased. The consumer markets in Germany and the Netherlands stagnated in 2008.
- UK and France are the largest markets. These countries have large ethnic minorities that are familiar with mangos. Consumption of exotic fruit is growing in every country.
- As consumers get more acquainted with mangos, preferences are shifting from nicely coloured but fibrous varieties, towards less fibrous varieties.
- The market for ready-to-eat mangos (pre-cut and packaged) is small but growing quickly.
- The EU market relies almost completely on imports. Between 2003 and 2007, imports of mangos increased 47% in value and 32% in volume. There is an extensive and growing inter-EU trade in mangos in the EU, with a few EU countries acting as suppliers.
- Developing countries (DCs) accounted for 84% of the imports of mangos into the EU. The origins are diverse as the supply of mangos is seasonal. Imports from Brazil decreased sharply. Imports from South Africa also decreased, while imports from Peru increased. Some upcoming DC suppliers are Pakistan, India and West African countries.
- Imports from other countries outside the EU grew more quickly than imports from DCs. Israel became an important supplier of mangos, especially to France.
- The Netherlands is the leading importer and distributor of mangos in the EU. The UK and France are also large importers and have large consumption markets.
- Supermarkets are the main outlet for mangos and now provide a year round availability. The trade in mangos is not as concentrated as in other tropical fruits, such as bananas or pineapples. Many importers are involved in trading mangos.
- Mangos are imported into the EU by own-buying groups and by independent importers. As supermarkets often work with preferred suppliers and demand large quantities, their buying groups are usually less interesting for exporters from DCs.

This survey aims to provide exporters of mangos from DCs with product-specific market information about gaining access to the EU market(s). By focusing on the EU market(s) for one product, this document provides additional in-depth information, that is complementary to the more general information and data provided in the CBI market survey 'The fresh fruit and vegetables market in the EU', which can be downloaded from <http://www.cbi.eu/marketinfo>.

Detailed information on mango is given in appendix A. This survey discusses the EU in general and the following markets in particular: the Netherlands, the UK, France, Germany, Belgium and Spain.

1 Market description: consumption and production**Consumption**

Mangos are one of the faster growing exotic fruits in the EU. Consumption of mango in the EU is still among the lowest levels in the world. The average consumption of mango worldwide is 3.42 kg per person per year. The highest consumption level is in Asia, followed by Latin America, Africa, Australia (MINECO, 2007).

The United States of America (USA) and the EU have the lowest consumption levels, but the EU market is expected to grow much more quickly. According to projections from the Food and Agricultural Organisation (FAO, 2006), net imports by the EU will increase to 224 thousand tonnes in 2014, an annual increase of 2.5%. The USA market is expected to increase 1% per year, and worldwide mango imports are expected to increase 1.4% annually until 2014.

In 2007, the total apparent consumption¹ of mangos in the EU was 202 thousand tonnes, with a value of €248 million (Table 1.1). Average consumption per person was 0.40 kg per year. Between 2003 and 2007, consumption increased 31% in value (7% annually) and 27% in volume. The markets in the UK, Germany and Belgium experienced strongest growth in value and volume between 2003 and 2007. The Portuguese market decreased in this period, and the Dutch market decreased in value, but increased in volume.

Table 1.1 Apparent consumption of mango, 2003–2007, value in million euros and volume in thousand tonnes.

	2003		2005		2007	
	Value	Volume	Value	Volume	Value	Volume
Total EU-27	190	159	203	183	248	202
United Kingdom	35	32	49	46	72	56
Germany	30	29	37	32	47	41
France	36	22	44	22	39	22
The Netherlands	41	28	21	31	31	32
Portugal	19	20	19	16	18	14
Spain	8	7	7	9	9	10
Belgium	4	3	2	3	6	4

Source: Eurostat, 2007, 2008

The **UK** is the largest market for mango in the EU, accounting for 29% of the EU consumption value in 2007. The UK was the strongest growing market for mangos, with a growth rate of 109% in value (20% per year) and 75% in volume (15% per year) between 2003 and 2007. Mangos are available in supermarkets all-year round. Tommy Atkins is the most popular, accounting for 80% of the sales in supermarkets, but is increasingly replaced by other varieties. Though the largest growth in consumption occurred a few years ago, the demand for mangos is still rising. The UK's ethnic minority groups, notably Indians and Pakistanis, are a major driver behind the increased demand. As more native British consumers are exposed to exotic fruits, the demand may rise further. Demand for exotic fruit is rising (AGF, 2008).

Germany accounts for 19% of the EU consumption value in 2007. Between 2003 and 2007, consumption increased 58% in value and 40% in volume, an average annual growth of 12% in value. While mangos are still a minor product in Germany, their availability has increased over the years, especially since discounters introduced them in their stores. In 2008, demand decreased and sales of mangos in Germany dropped. This might be caused by high prices for mangos this season, in combination with a large supply of summer fruits (AGF, 2008).

With 16% of the consumption value in the EU in 2007, **France** is the third consumer market. Consumption has not increased much since 2003. Consumption increased 8% in value and 1% in volume. As in the UK, ethnic minorities are an important driver behind the increased consumption of exotic fruit in general and mangos in particular. Popular species are Osteen, which originally comes from Spain, and Kent Tommy Atkins and Haden, which stem from Brazil. Sales of exotic fruits are expected to continue to increase as more consumers become interested in new, non-native, dishes and products.

The Netherlands is the fourth EU market, accounting for 13% of apparent consumption. The Netherlands is a major trader in mangos. Dutch imports of mangos are the largest in the EU, with most of it being exported to other EU countries (Chapter 3).

¹ Calculation based on data from Eurostat (2007, 2008) and the Food and Agriculture Organisation (2008). Apparent consumption includes industrial and consumer demand, and is calculated as production plus imports minus exports.