

The European market potential for mangoes

The consumption of mangoes in Europe is rising despite difficulties in sourcing and the preference for local seasonal fruit. The market prefers Kent and Keitt varieties and there is an increasing demand for ripened and freshly cut mangoes. The availability of high-quality mangoes can greatly influence the consumption in Europe.

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1. Product description

Mango (scientific name: *Mangifera indica*) trees are cultivated in tropical and subtropical regions. Important varieties and hybrids for the European market include Kent, Keitt and alternatively Palmer. The fibreless varieties are most in demand because of consumer preference.

Fresh mangoes are available as:

- Normal whole fruit
- Ready-to-eat (ripened at destination)
- Tree-ripened (air-freighted)
- Freshly cut (consumer packed)

Harmonized System (HS) code	08045000 Fresh or dried guavas, mangoes and mangosteen*
Commercial varieties	<ul style="list-style-type: none">• Kent (fibreless)• Keitt (fibreless, productive)• Palmer (minimal fibre)• Osteen (typical variety in Spain)• Tommy Atkins (long shelf life, fibrous but declining interest)• Amelie (Burkina Faso / West Africa)• Shelly (Israel)
Minor commercial varieties (air freighted)	<ul style="list-style-type: none">• Ataulfo (small Mexican variety)• Nam Dok Mai (exotic variety from Thailand / Southeast Asia)• Alphonso (India, mainly ethnic market)• Kesar (India, mainly ethnic market)

*The Harmonized System (HS) Code for mangoes also includes guavas and mangosteen. Considering these latter two are exotic products, mangoes will be the main product in the trade statistics.

2. What makes Europe an interesting market for mangoes?

Mangoes are a popular tropical fruit and their consumption is increasing as prices have become more attractive to consumers. Mangoes are commonly imported from developing countries. Finding a reliable supply is one of the major issues to maintain stability in the mango market.

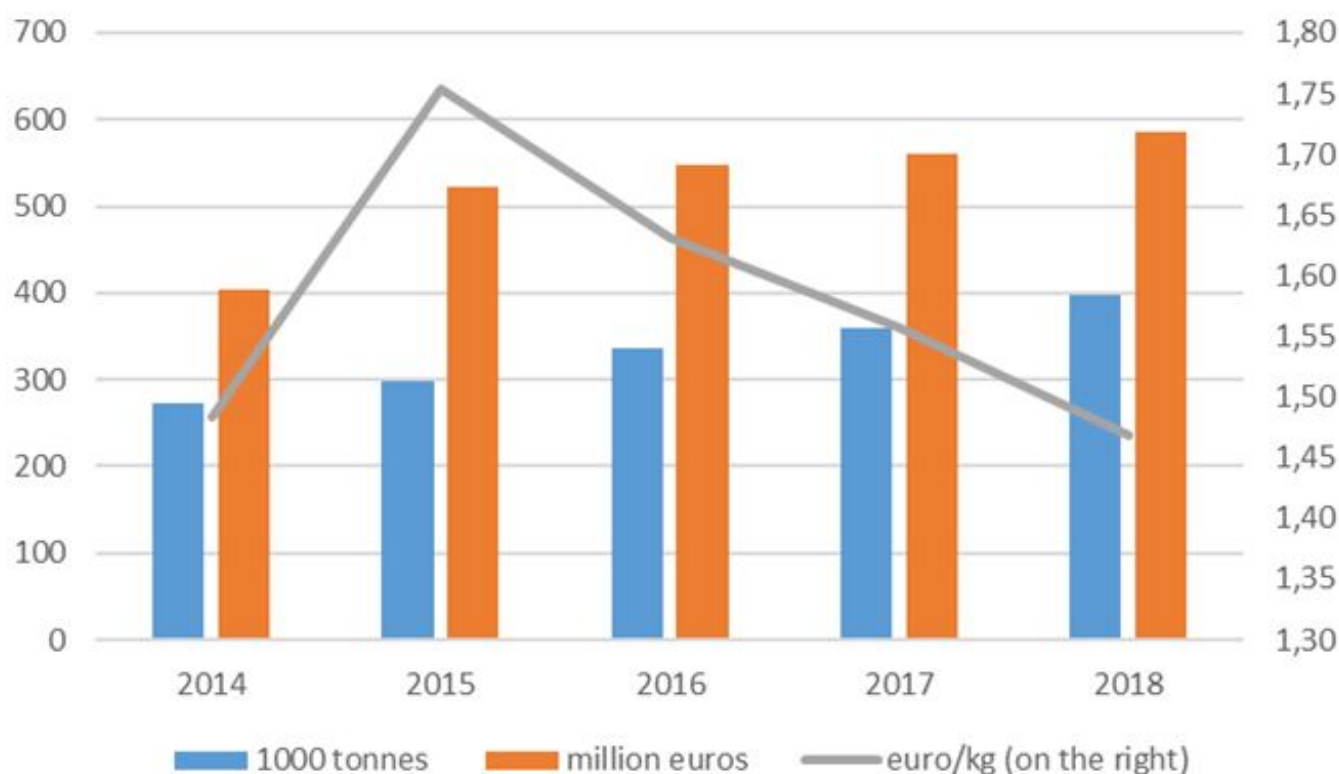
Fresh mango consumption increases annually as prices go down

Total European mango imports increased to nearly 400,000 tonnes in 2018, 38,000 tonnes more than the year before. However, the average import prices (value-weight ratio) have been slightly declining – this is most likely the result of higher available volumes (see Figure 1).

Consumers are getting the taste for mangoes, mainly thanks to the fibreless mango varieties and improved ripening practices. Still, the mango consumption is mostly supply driven and mainly influenced by external factors such as available volumes, quality, price, consumption in origin countries and the promotion of competing local fruits in Europe (see also trends below). For this reason, mango sales are difficult to predict.

The short-term supply volumes and prices can be volatile, but with average mango prices declining there will be more potential to promote the consumption.

Figure 1: European imports of mangoes (incl. mangosteens, guavas)



Source: Eurostat / Market Access Database

Tips:

Maintain a long-term strategy when supplying the European market. Once you start supplying European clients, it is important to show continuity. To leave a good impression you should continue to show exportable mangoes even when prices are less favourable.

Check regular news updates to see current developments in supply and demand, such as the [‘Overview global mango market’ on Freshplaza.com](#).

Mangoes are a popular fruit to source in developing countries

Mango imports from developing countries increase every year by around 9 to 13% (see Figure 2). This is in contrast to the imports from other non-European suppliers, mainly Israel and the United States, which is much less and does not show growth. The mango trade depends heavily on countries with tropical climates. The annual growth from developing countries is a positive sign that growers are gradually improving fruit quality and supply reliability.

Due to different climate zones and short harvest periods, there is not one single country or mango variety that can offer a long supply season. That is why different varieties and production sources are needed to assure continuity. The production campaigns in these tropical countries are not always stable. Temporary shortfalls and oversupply (due to overlapping seasons) sometimes result in an erratic supply market. This volatility and the need for multiple suppliers make it difficult for traders to fill supply programmes with major buyers.

The lack of a programmed market supply makes mango an interesting export crop for smaller growers. However, while even large producers struggle with quality issues, for small producers it is often difficult to comply with European expectations. The market needs stability in quality and supply, but it is not sure to what extent this will improve over time.

Tips:

Increase your chances in Europe by providing both a reliable and quality supply.

Reduce your risks in the mango trade by diversifying your markets (both local and export markets).

Find out how to apply the best quality management for mangoes by reading the '[Mango postharvest best management practices manual](#)' on [Mango.org](#).

Do as you say and be honest about the volume and quality you can offer. Communicate proactively with your buyer whenever you expect quality issues. Success through making things seem better than they are is short-lived.

3. Which European countries offer most opportunities for mangoes?

The Netherlands play a central role in the mango trade in Europe, but Spain also takes on a more prominent trading role besides their own mango production. The traded mangoes mainly end up in Germany, the United Kingdom, France and Portugal. French and Portuguese consumers value a good tasty mango, while Germany and the United Kingdom maintain the highest standards in terms of certification.

The Netherlands: your main trade hub for mangoes

The Netherlands is the main trade hub for mangoes in Europe. When doing business with Europe, the Netherlands is a country which you practically cannot ignore.

Around 55% of all mangoes in Europe are imported in, or traded by, the Netherlands. The Dutch mango exports of 184,000 tonnes are nearly as high as its imports (211,000 tonnes). This confirms their important role in the distribution of imported mangoes. For the same reason you can find a relatively large amount of experienced

traders in the Netherlands.

Dutch traders buy from a wide selection of suppliers. Just like in other European markets, most imports come from Peru (87,000 tonnes) and Brazil (86,000 tonnes), but several thousand tonnes are sourced in a variety of supply countries such as Ivory Coast, Dominican Republic, Senegal, Mali, Guatemala and Burkina Faso. Dutch traders try to meet a year-round demand and sometimes include some of the more exotic mango varieties such as air-freighted Nam Dok Mai and Ataulfo.

The Netherlands itself offer a medium-large market for mangoes. Most mangoes are sold by supermarkets and increasingly as convenient freshly cut products (see trends below). However, most mangoes in the Netherlands are re-exported to Germany (46%) and France (9%). The rest of the mangoes are divided mainly over Belgium, United Kingdom, Scandinavia and Russia (despite the Russian import ban). Because of the challenges in sourcing mangoes, the Netherlands will maintain its leading role in the import and re-export of mangoes for several years to come.

Tip:

Include the Netherlands into your European export plan. Even if you do not manage to sell through the Netherlands, just by meeting and talking to Dutch mango importers or traders you can learn a lot about the mango market in Europe. Some of the mango traders you can find on the website of the Dutch [Fresh Produce Centre](#). The member list ('onze leden') is only available in Dutch.

Germany: your largest destination market for mangoes

Germany is the largest consumption market for mangoes. Therefore it makes sense to include Germany among your main target countries, but only when your supply and food safety are well managed.

In 2018 Germany had an estimated mango consumption of 89,000 tonnes (imports minus exports). And with 55% import growth in the past five years, reaching 102,000 tonnes, the German market has experienced an above average growth. Although mangoes are often still considered an exotic fruit, it increased in popularity. As more and more consumers are becoming familiar with mangoes, demand can continue its growth over the next years.

Future developments on the mango market in Germany depends on how supply and compliance will be managed. As an exporter you must take into account the strict supply criteria. Food safety and pesticide residues are a deal breaker for supermarkets, while consumers buy mangoes based on price and appearance. Taste is not always the most direct concern, but consumers will not repeat their purchase after a bad experience. Supplying a product that lives up to the high German standards and expectations can be a challenge for exporters.

Most mangoes in Germany are supplied through the Netherlands, either by German importers using Dutch logistics or by Dutch traders. It can be convenient to supply Germany through Dutch traders, because they work according to German standards but can re-direct your mangoes to other markets when they are not fit for German buyers.

Tip:

Test your mangoes regularly on pesticide residues to see if they are fit for the German market. Maintain a residue standard of 30% to 50% of the European guideline as provided by the [MRL](#)

United Kingdom: convenience is dominant

The United Kingdom is an important market for mangoes, but also very selective and currently at its top. Export opportunities can be found in mango diversification and ethnic markets.

Right after Germany, the United Kingdom is the second-largest importer of mangoes in Europe. Over 86,000 tonnes were imported in 2018, but import volumes have been stabilising over the past three years. The stabilisation is a result of a maturing market and the devaluation of the British pound.

Current developments are mostly focused on diversification such as [freshly cut mangoes](#) (see trends below), but also frozen [mango lollies](#) and [ice cream](#). Another specific market segment is the ethnic mango market: the United Kingdom offers the best opportunities, and is an important market for specific mango varieties from Pakistan and India such as the air freighted Alphonso and Kesar mangoes. Throughout the year 2018, Pakistan and India (6,500 and 5,000 tonnes respectively) were the third and fourth non-European mango suppliers after Peru and Brazil (16,800 and 14,500 tonnes).

Brexit (the United Kingdom leaving the European Union) and the low value of the British pound may put further pressure on the mango market. But it can also result in more direct imports from origin countries as trade benefits with the European Union member states may diminish.

Tips:

Make the United Kingdom your priority market when you want to export Indian mango varieties. The United Kingdom is by far the best market for mango varieties such as Alphonso or Kesar.

Check the [Exim World United Kingdom buyer and importer directories](#) to see which British companies are importing mangoes (especially imports from India because the directory is Indian based).

France: an interesting market for West African suppliers

Mango is a popular fruit in France. France can, more than other countries, be an interesting market for suppliers from West Africa. But the general preference of consumers for local products will always compete with the import of mangoes.

With 66,900 tonnes of imported mangoes in 2018 and limited exports, France has positioned itself as the third-largest consumer market in Europe. Because of the historic connection, West Africa has a relative high export volume of mangoes to France. For example, Ivory Coast exported 10,600 tonnes to France, which is more than mango giant Brazil.

The preferred varieties are Kent and Keitt, the same as in the rest of Europe. But you can also find Amelie mangoes from Burkina Faso and tree-ripened mangoes shipped by air in the Carrefour supermarket, and not just in the high-end catering segment.

There are growth perspectives for mangoes from Ivory Coast, Senegal, Mali and Burkina Faso. But as an exporter you must be aware of two strong competitive factors:

- Peru has entered the market with force during the European winter season and increasingly competes with the start of the West African season. Trade statistics from 2018 show increased imports of 68% from Peru in the last three years to a volume of 17,400 tonnes.
- France has a strong preference for locally produced fruits (see also trends below). This means the mango supply from neighbouring Spain is relatively high (11,700 tonnes) but you can also expect competition from local summer fruits such as stone fruit.

Tips:

Check the [seasonal calendar of northwest Europe](#) to see which fruits are possibly competing with your mangoes. Where possible try to plan around these seasons or export when prices for local seasonal fruit are still high.

Go to [Rungis wholesale market](#) when you are visiting France. This will be a good reference and starting point when you want to enter the French market.

Spain: one of the fastest-growing markets for mangoes

Spain is one of the fastest-growing importers of mangoes. With both production and exports increasing, Spain is developing itself as a potential trade hub for mangoes. This means you can reach different markets through Spain in addition to the internal market.

The [Freshplaza overview of the global mango market](#) shows that Spain closed the year 2018 with a national production of 34,000 tonnes, 30% more than the year before. This good production year, with Osteen as the main mango variety, has driven the Spanish consumption upward. The annual [consumption has gone up from 210 to 580 grams per capita](#) in the last five years.

Even more worth mentioning is the increased imports and exports. The trade with non-European suppliers and the exports to European markets both increased by 72% over the past five years, the export volume being higher than the import (see Figure 5). Spain has become a net exporter of mangoes. The majority of Spain's export goes to Portugal (24,400 tonnes) and France (15,900 tonnes). For exporters, Spain can be a practical market to use as an entry into southern Europe.

Tip:

Use Spanish mango importers and traders mainly to strengthen your position in France and southern Europe.

Portugal: the country with the highest consumption per capita

With a little over 10 million inhabitants, Portugal is not a large country. Nevertheless, it has the highest mango consumption per capita. It is an interesting market for those that are competitive with or additional to the Spanish and Brazilian suppliers.

An estimated net import volume of 22,700 tonnes (import minus export) indicates that the average person consumes at least 2.2 kilos per year. Spain is by far the largest supplier to Portugal with 17,600 tonnes, followed by Brazil (9,600 tonnes), which exports both sea- and air-freighted mangoes. The rest of the demand and supply gaps are mainly covered by mangoes that are traded through the Netherlands (9,000 tonnes). This means that

Portugal offers limited direct opportunities for suppliers from other regions.

It can be challenging to find Portuguese importers that are willing to do business with unknown supply sources. Most of them will be comfortable with the trade they are used to with Spain, Brazil and the Netherlands. But Portugal is a mature market with a taste for mangoes, so it can be worthwhile to explore more direct trade opportunities, especially in between the Spanish and Brazilian seasons.

Tip:

Direct your export to the Netherlands or Spain when you have difficulties getting your mangoes onto the Portuguese market.

4. What trends offer opportunities or pose a threat on the European mango market?

Mangoes are increasingly sold as ready-to-eat or as a freshly cut product. This increases positive consumer experience and provides more diverse opportunities. However, a developing preference for local fruit can result in fluctuations in demand.

Freshly cut and ripened mangoes attract more consumers

Mangoes are more and more offered as a ready-to-eat product, either ripened as a whole or freshly cut. As an exporter you can add value through processing or increase your chances by supplying the right quality fruit for ripening.

Consumers that buy a tropical (more expensive) fruit such as mangoes, are looking for a good experience and a quality product that fits with their fast lifestyle. Ripened, ready-to-eat and freshly cut are a safe and easy choice for the consumer.

Tree-ripened (and air-freighted) mangoes provide the best quality, while ripening in the destination country offers the consumer with a more economical alternative. Freshly cut mangoes (also picked ripe) is the answer for convenience and quality at the same time. That is why this segment is growing, especially in countries with high demand for convenience products such as the United Kingdom and the Netherlands. But the southern European countries Spain and Italy are also pushing this market. Getting perfectly ripened mangoes to European consumers will require exporters to maintain a perfect quality control.

A company that successfully entered the market for freshly cut mangoes is the British-Ghanaian fruit company [Blue Skies](#). Their product can be found in supermarkets such as Tesco and in 2019 [Blue Skies introduced their fresh-cut range in Carrefour](#). Besides Ghana and the United Kingdom, the company also has cultivation and processing operations in Brazil, Egypt and South Africa to maintain flexibility and deal with fluctuations.

For a supplier, entering the freshly cut mango business can have major implications in terms of following the European expectations of social conditions for workers and food safety requirements. You also need efficient logistics and often work with low margins.

It is best to first establish European alliances that ensure you have a market for cut mangoes. With the right alliances freshly cut mangoes can provide you with a segment that not everyone is able to enter. In the long term you must anticipate on keeping your product sustainable. This is important because the market will focus more and more on reducing plastic packaging as well as air-freighted fruit.

Image 1: Dutch supermarket promotion of freshly cut mangoes from Brazil, “ripened under the sun”



Photo by [Fruit Consultancy Europe](#)

The experience with fruit ripening is also increasing quickly and the technology is being optimised. Specialised companies offer fruit ripening as a service such as the Dutch [LBP](#) (Logistic Business Partners), or large fruit suppliers such as [Ripenow](#) and [Nature's Pride](#) have implemented their own ripening facilities. The best way to supply ripening companies is to work together closely and optimise the fruit picking time.

Tips:

Check the ins and outs of freshly cut fruit in the [FAO Technical Guide for the Processing of fresh-cut tropical fruits and vegetables](#).

Respect [international labour standards](#) and [implement a HACCP management system](#) when you are planning to process fresh mangoes. To meet European expectations you will need to invest in food safety, human resources and professional mango growers. It is crucial to organise all aspects well, because only doing half of the required work does not provide you with a market in Europe.

Stay up to date with innovations in packaging and freight solutions to make freshly cut mangoes more sustainable.

Growing preference for local in-season fruit

Although the interest in tropical and exotic fruit is strong on the European market, there is also an increasing preference for locally produced and in-season fruit. This will not stop the interest in mangoes, but as a supplier you must count on a stronger competition from local producers and other fruits.

The main drivers for consumers to eat local, seasonal produce is the idea that it is more fresh and sustainable

(less transportation). But price is also a factor. According to fruit companies it can sometimes be difficult to supply tropical or exotic fruit when local seasonal fruit is on the market, because local products are often cheap and abundant.

Local sourcing also offers retailers better control over the supply chains and more transparency. A better controlled and shorter supply chain results in a better quality product. That is why, for example, the [Carrefour Group](#) is initiating a transition to promoting mainly local, seasonal and organic products.

It is not likely that local fruit will affect the popularity of mangoes. Mango consumption will continue to grow as long as mangoes can compete with local fruit. But you can expect stronger fluctuations in demand, especially in the summer and during the Spanish mango season. As a supplier you must accept being flexible in your pricing as well as your export markets. Since mangoes are not the most stable fruit in trade, it can be difficult to find a buyer that is willing to commit to fixed volumes and prices.

Tips:


Read the [CBI Trends in fresh fruit and vegetables](#) to get more insights into fresh trends.


See the study [Entering the European market for mangoes](#) to learn more about competition.


This study has been carried out on behalf of CBI by [ICI Business](#).

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