

The European market potential for mango puree

In the long term, the European market for mango puree is expected to show stable growth. This growth is likely to be driven by changes in the consumption patterns of European consumers. This especially relates to the popularity of smoothies as a convenient and healthy liquid snack option. Also, industry users (primarily in dairy, bakery/pastry and beverages) are inventing new/innovative and healthier solutions with mango puree as one of the main ingredients. The Netherlands, the United Kingdom, Germany, France, Spain and Portugal offer opportunities for developing country suppliers.

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1. Product description

Mango puree is a product obtained by disintegrating and sieving the edible portion of ripe mango fruits (*Mangifera indica*). The terms pulp and puree are sometimes used interchangeably.

Mango puree can be produced without removing the water (single-strength puree) or by physically removing part of its water content (concentrated mango puree). Mango purees are traded as a product that can be kept at a room temperature in aseptic packaging or frozen.

Mango purees are mostly used as an ingredient in the beverages industry (to produce juices and smoothies), but also in the baby food industry and in the jams, bakery and confectionery industries. Smaller quantities of mango purees are also sold as final products.

The world's largest producer of mango puree is India, accounting for around 75% of global production. Other important producers include Mexico, Ecuador, Brazil, Guatemala, Cuba, Peru, Costa Rica, Pakistan, Vietnam, and South Africa. There are many varieties of mango that are used for the processing into purees, but the leading are the Indian varieties Alphonso, Totapuri and Kesar. Famous varieties used for pulping in Central and South America include Tommy Atkins, Del Ica, Magdalena and Kent.

This study covers general information regarding the market of mango puree in Europe that is of interest to producers in developing countries.

It is not possible to compile precise trade statistics for analysing the European trade of mango puree, as there is not an official statistical code. The closest code that can give some insight into the trade of mango puree is 20089948 - Guavas, mangoes, mangosteens, papaws 'papayas', tamarinds, cashew apples, lychees, jackfruit, sapodillo plums, passion fruit, carambola and pitahaya, prepared or preserved, not containing added spirit but containing added sugar, in immediate packaging of a net content > 1 kg. As the description reveals, this code also includes other products.

Picture 1: Mango puree

Picture 2: Frozen mango puree



Picture 3: Bag in steel drum packaging

Picture 4: Bag in box packaging



2. What makes Europe an interesting market for mango puree?

Europe accounts for around 40% of the world's mango puree imports. Imports of mango puree have increased in volume by an estimated 4% on average per year in the period 2014-2018. Virtually all imports from outside Europe come from developing countries.

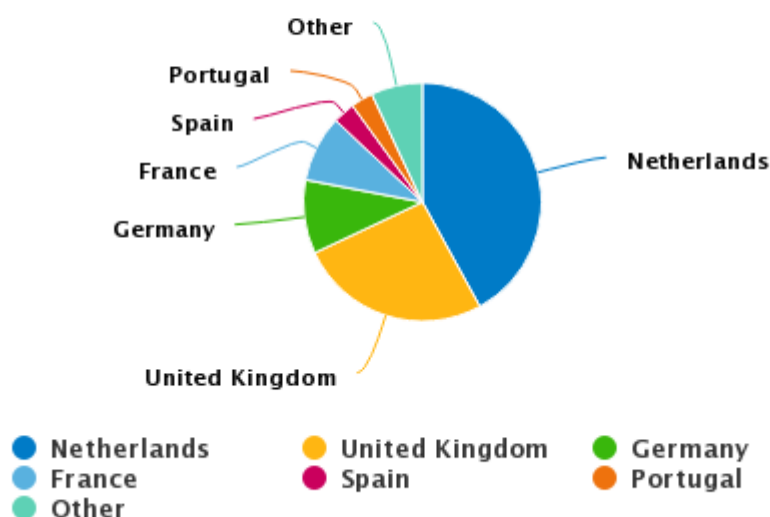
In the next five years, the European market for mango puree is likely to increase with an annual growth rate of 3-5%. Main reasons for the expected market growth are the popularity of mango as a flavour and the increased consumption of smoothies and functional beverages. Mango is also increasingly being used by fruit preparation producers to make ingredients for the dairy industry (yoghurts) and the bakery industry (as a filling). Mango

puree is very popular as baby food. One of the newer trendy applications of mango puree is in the production of fruit bar snacks. Those mango fruit bars are produced in different ways, including dehydration of mango puree.

Estimated European imports of mango puree are between 50 to 60 thousand tonnes of single-strength puree and around 20 thousand tonnes of concentrated mango puree.

**Figure 1: Leading importers of mango puree in Europe
(estimated shares)**

2018



Source: Eurostat, national statistic and industry estimations

Note: the figure above represents the estimated import share of mango puree based on industry sources and available statistics by India as the largest European supplier. Exact data about imports per country does not exist.

3. Which European countries offer most opportunities for mango puree?

As Europe's main importer of mango puree, the Netherlands is an interesting focus market. However, the Netherlands re-exports the majority of imported quantities, so it is also interesting to explore opportunities in the markets with high consumption such as the United Kingdom, Germany, France, Spain and Portugal.

The Netherlands: the largest European mango puree importer

The Netherlands is Europe's largest importer of mango puree. It is estimated that around 80% of all imported mango purees are re-exported to other destinations, primarily to Germany and France. The remaining 20% is consumed domestically, which means that the Netherlands is actually a rather small market.

India is the largest supplier of mango puree to the Netherlands, with an estimate market share of more than 70%, followed by Brazil, Colombia and Peru. Egypt is the fastest growing developing country supplier, with an estimated 60% annual growth rate of exports to the Netherlands. However, the share of Egyptian suppliers is still very small (estimated at less than 1%).

The majority share of imported purees is traded by large Dutch beverage industry suppliers such as [SVZ](#) (with facilities in the USA, Poland, Belgium and Spain) and [Prodalim](#) (with processing facilities in Brazil, Vietnam, Mexico and Poland). Examples of other traders include [Verbruggen Juice Trading](#), [Fruitlife](#), [Global Fruit](#) or [Santos](#)

Enterprise Food.

Mango is a very popular ingredient among Dutch producers of mixed flavour juices. Those mixed flavour juices are usually labelled with names such as 'Tropisch/Tropical', 'Exotisch/Exotic' or 'Multivitamin' and contain some proportion of mango puree. Mango puree is mixed by juice blending companies with other ingredients to create exotic combinations that are appealing to consumers. Other fruits used in these mixes are pineapple, melon, passion fruit, etc. The retail market share of mixed flavour juices in the Netherlands is the highest in Europe – 46%, with high mango as a frequent ingredient.

The leading juice blending and bottling company in the Netherlands (using mango puree in flavour combinations) is [Riedel](#). Other juice producers and mango puree users include [Vrumona](#) (part of the Heineken group), [Infra](#), [Mogumogu](#) and [Fruity King](#). Last but not least, the Netherlands is also home to Europe's largest producer of soft drinks and fruit juices, [Refresco](#).

One of the main market trends is decreased consumption of fruit juices and increased consumption of low-calorie ('light') soft drinks. Mango puree is one of the favourite flavours in those types of drinks, but also in energy drinks, iced teas and mineral waters with the addition of fruit juices. The smoothie production segment has seen particularly high growth in use, as mango puree adds sweetness, thickness and smoothness to final products.

Import of organic mango puree into the Netherlands is also increasing, specifically boosted by the increased demand from the baby food industry. Some Dutch companies, such as [Ariza](#), are specialised suppliers to organic mango puree users, including baby food producers. Dutch baby food brands using mango puree in their products are [Nutricia](#) (with the brand 'Olvarit'), [Hero Baby](#) and [De Kleine Keuken](#).

Picture 5: Example of a smoothie with mango puree as an ingredient in the Dutch market



Picture 6: Example of a Dutch baby food brand with mango puree as an ingredient



Tip:

Keep up to date on the fruit juice market in the Netherlands by contacting the [Dutch Association for soft drinks, mineral water and juices](#) (dutch language site).

The United Kingdom: a smoothie lover

The United Kingdom is the second-largest importer of mango puree in Europe. The exact data about the shares of the leading suppliers are not known, but the market structure is estimated to be similar to other markets, with India as the largest supplier. However, United Kingdom also imports significant quantities of mango puree from the Netherlands and Germany (as transit countries) and from Dutch and German fruit processing and warehouse facilities established in other European countries (mostly from Poland).

The leading mango puree importers and suppliers in the UK include [Cobell](#), [Kiril Mischeff](#), [David Berryman](#), [Uren](#), [Fuerst Day Lawson](#), [Döhler UK](#) and [Billington Food Ingredients](#). The leading smoothie brand is [Innocent](#) (owned by Coca Cola) followed by [Naked](#), while the leading fruit juice brand is [Tropicana](#) (owned by PepsiCo). In the category of baby food, the largest user of organic mango puree is [Ella's Kitchen](#). Mango puree is also one of the fastest growing ingredients used by the ice cream industry.

Consumption of smoothies is the main driver for the increased mango demand in the United Kingdom. According to the [European Fruit Juice Association](#), the United Kingdom is the largest European market for smoothies, with 66 million litres sold in 2018, of which 44 million litres were sold as branded and 23[TP-MV1] million litres as private label products. According to a recent [Kantar survey](#) (March 2019), young people in the United Kingdom are the most frequent consumers of smoothies (23% of 16–24-year-olds drink smoothies at least once a day).

Tip:

Learn more about the fruit juices market in the United Kingdom by visiting the website of the [British Soft Drink Association](#).

Germany: fond of organic mango puree

Germany imports significant quantities of mango purees from India, followed by the Netherlands as a transit country. The largest quantities of mango puree are used by various German fruit juice and smoothie companies. Mango as a flavour in fruit drinks in Germany is very popular and many new product launches include mango puree as ingredient.

Some of the leading mango puree importers and industry suppliers in Germany include [Döhler](#), [Binder International](#), [Carrière](#), [Pijahn](#) and Austrian companies with facilities in Germany - [Agrana](#) and [Grünewald](#). In the German fruit juice industry, mango puree is mostly used in juice blends (so-called 'multivitamin' juices). The largest share of fruit juices (with mango puree as an ingredient) is sold under brands of retail chains (private labels), with [Refresco](#) as the #1 juice developer and packer (Refresco's headquarters are in the Netherlands, but Germany is among Refresco's key markets).

The smoothie industry is a significant user of mango puree in Germany. Germany is the second-largest consumer of smoothies in Europe, with 55 million litres sold in 2018. In only 3 years' time, consumption of smoothies in Germany has doubled, from 25 million litres in 2015 to 55 million litres in 2018. One-third of sold smoothies were private label and the remaining two-thirds were brands. The international brand [Innocent](#) is one of the leading brands, but there is also significant production by local producers. One of the most innovative companies is [TrueFruits](#), which uses mango puree in several types of products.

There are distinct opportunities for developing country suppliers in the German market in organic mango puree. A large user of organic mango puree is the German baby food industry, led by one of the foremost organic babyfood pioneering companies, [Hipp](#). Leading organic food brands [Alnatura](#) and [dm-Bio](#) have also launched several products with mango puree as an ingredient, including baby food, curries, yoghurts and sorbets. Some of those companies, such as Hipp, are supporting [direct sourcing from organic suppliers](#) from developing countries.

Tips:

Find German traders of fruit purees in the [German company directory](#) – Wer Liefert Was.

Stay up to date on German fruit juice industry by visiting the website of the [Association of German Fruit Juice Industry](#) (in German only).

Be informed about developments in the German baby food sector from the [German Special Nutrition Association](#)

France: mango puree as a comfort food

Around half of the mango puree imported to France is sourced from India, followed by the Netherlands and Germany as transit countries. The largest user of mango puree in France is the fruit juice industry, which is the second largest in Europe, with 1.34 million litres consumed in 2018. Consumption of mango puree is dominated by mixed-flavour fruit juices such as [Joker](#) or [Tropicana](#). Consumption of smoothies is increasing, but it is smaller compared to Germany and the United Kingdom.

Specifically, mango puree is increasingly being sold in France as ingredient in soft sweets/comfort foods, such as mousses, spoonable fruit yoghurts, panna cotta and puddings. Also, several producers are offering mango purees as a final product, such as [Valade Group](#), [Ethiquable](#), [Capfruit](#), [Ponthier](#) or [Léa Nature Group](#). Many of those companies, such as Ethiquable, source mango puree directly from developing country suppliers.

Spain: Mexican mango puree preference

The mango puree market structure in Spain is different from the majority of other European markets, as it is one of the rare countries where India is not the leading supplier. It is estimated that at least one-third of mango puree is imported from Mexico, followed by India, Brazil and Colombia.

Mango purees are mostly used by the fruit juice and nectars industry, with [Don Simon](#) and [Juver](#) (part of Conserve Italia) as the leading brands. Similarly to other European countries, mango puree is used in different market segments (such as smoothies, yoghurts, ice creams, etc). However, a special characteristic of the Spanish market is the use of the mango puree in 'salsa' type dips. Product examples include [Montosa](#) and [Hacendado](#) (private label of retail chain Mercadona).

Portugal: a true mango juice lover

It is estimated that Portugal sources more than 90% of its mango puree from India. The share of other suppliers is very small, with Vietnam as the only growing developing country, although quantities remain small. Juices with mango puree as an ingredient are also imported from South Africa, from beverage company Ceres. The majority of imported mango puree in Portugal is used by the fruit juice and nectar industry.

A specific characteristic of the Portuguese market is its strong preference for mango flavour in fruit drinks. According to the European Fruit Juice Association, the share of mango as a flavour in fruit juices in Portugal was almost 15% in 2017. This is by far the largest share in Europe, indicating that Portugal may be the largest mango puree consumer per capita in Europe.

The leading mango puree users in Portugal are fruit juice bottlers and blenders with [Compal](#), [Ceres](#) and [Um Bongo](#) as the leading brands. Mango puree is also sold as a final product by producers such as [Panegara](#). The smoothies segment, as a user of mango puree, is developing in Portugal, with innovative companies such as [GL](#) (smoothies brand [Sonatural](#)).

Tips:

See our study on Market [Statistics](#) & Outlook for Processed Fruit and Vegetables for more information on general trade developments within the European processed fruit and vegetables sector.

Check relevant trade statistics using tools such as ITC [TradeMap](#) or [Trade Helpdesk](#).

4. What trends offer opportunities on the European mango puree market?

The increasing popularity of smoothies and increasing popularity of mango as an exotic flavour, combined with the increasing demand by the food processing industry, are the leading drivers of the growing interest in mango puree in Europe.

To find out more about general trends, read our study about [Trends on the European Processed Fruit and Vegetables Market](#).

Popularity of smoothies

Smoothies are a relatively new type of drink. Smoothies can be defined as a blended fruit puree with a thick, smooth texture, often with added milk, yoghurt or fruit juice. Smoothies have become a very popular option for breakfast in Europe, or as a kind of healthy liquid snack between main meals. Home-prepared smoothies are usually made by blending fresh or frozen fruit and vegetables with the addition of water, fruit juice or milk. On

the other hand, the smoothie processing industry typically uses fruit purees as the most common ingredients. The fruit purees give the typical thickness and smooth texture to the drink.

Mango puree is a very popular flavour in smoothies to add sweetness and the preferred thick texture. Mango type smoothies are prepared usually by blending mango puree with other fruit purees such as banana, apple, passion fruit and orange.

The global market for smoothies is forecasted to increase by an average annual growth rate of between 8-10% until 2021. One of the trends supporting this outlook is the decreased consumption of sugars. Smoothies can be produced with a lower average sugar content than fruit juices. The lower sugar content is achieved by combining fruit with vegetables and milk or water. The addition of water is not allowed in 100% fruit juices, which leads to a healthier consumer perception of smoothies compared to fruit juices.

Mango as a popular flavour

The mango flavour is very popular, especially among younger consumers. According to Innova Market Insight, global product launches incorporating mango flavours have increased by 240% over the last ten years. In Europe, [consumers like exotic tastes but not 'too exotic'](#). Mango fits perfectly into this category, and several ingredient suppliers forecast further growth for mango products. Austrian ingredient supplier 'Esarom' even called 2018 the year of the mango.

During the latest ANUGA trade show in 2019, 45 new product launches were exhibited with mango as an ingredient. Examples of innovative products using mango puree include ready-to-eat breakfast bowls (with cereals, yoghurt and mango-peach puree), mango ice cream enriched with passion fruit and chia, Brazilian mango fruit spread with tonka bean, mango sour sweet sauce, and vegan mango yoghurt with coconut milk. Mango puree is also frequently used in combination with coconut water as a flavour enhancer.

A good example of a developing country supplier that is offering 100% mango-based juice with enhanced mango natural flavour is the Egyptian company [El Nile Growth](#). These kinds of 100% mango juices are still not very common on the European market.

Organic mango puree

Organic mango puree is increasingly being used by the baby food industry. Traditionally, banana puree was the most commonly used type of fruit puree in infant food. However, producers are trying to diversify their flavour offer and are increasingly using new flavours such as mango puree. Due to its attractive taste, mango puree is also mixed with vegetable purees to improve the overall taste and make it more appealing for babies.

An interesting example of a developing country supplier of organic mango purees is the Peruvian company [Frutosa](#). Frutosa is a private venture, supported by several associates, including the Pronatur growers collective, which supplies organic fruit for the production of purees. Frutosa successfully entered the European market in partnership with French aromatic and fruit ingredients supplier [Astier Demarest](#).

One of the successful examples of added-value organic mango puree product in Europe is German company [Cosmoveda](#), which has partnered with Sri-Lankan farmers and agricultural cooperatives.

Other market segments such as the smoothie and fruit juice industries are also increasingly using organic mango purees.

Tips:

Suggest new product developments such as smoothie combinations or new flavours to your buyers. European producers of smoothies are constantly looking for innovations to increase their sales or diversify from competitors.


Read the [CBI Market Statistics and Outlook for Processed Fruit & Vegetables](#) to learn more about the general trade trends and the size of specific market segments.

Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe relevant to mango purees are [SIAL](#) (France, every even year in October), [Anuga](#) (Germany, every uneven year in October) and [BioFach](#) (Germany; organic products, every year in February).


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

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