

# Entering the European market for mango puree

Food safety certification combined with reliable and frequent laboratory testing helps create a positive image for mango puree suppliers wishing to export to Europe. Emerging suppliers can reap additional advantages through sustainable production methods and the implementation of corporate social responsibility measures. The strongest existing competitor to new suppliers of mango puree is India, with its well-established supply and recognised Alphonso variety. India's high mango production gives Indian suppliers the power to keep prices of mango puree relatively low, compared to those charged by Central and South American suppliers.

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## 1. What requirements must mango puree comply with to be allowed on the European market?

### What are the requirements?

All foods, including mango puree, sold in the European Union (the EU) must be safe. Imported products are no exception. Limits are placed on levels of harmful contaminants, such as pesticide residues. It should also be clear from the labelling and laboratory test results whether the mango puree contains any sugar or other additives.

### Contaminant control in mango puree

The [European Commission Regulation](#) sets maximum levels for certain contaminants in food products. This regulation is frequently updated. The most common requirements regarding contaminants in mango puree are related to the presence of pesticide residues, microbiological organisms and heavy metals.

### Pesticide residues

The European Union has set maximum residue levels (MRLs) for pesticides found in and on food products. Products containing levels of pesticide residues exceeding the prescribed limit are withdrawn from the European market. However, it is fairly uncommon to encounter excessive levels of pesticide residues in the mango puree trade. One of the reasons is that mango peel, which usually contains more residues than fruit flesh, is removed during processing. Still, producers need to be careful and control pesticide applications during the mango production season.

The European Union regularly publishes [a list of pesticides](#) that are approved for use in the European Union. This list is frequently updated. In 2019, the European Commission adopted 12 new laws prescribing changes with respect to nearly 80 different pesticides.

### Microbiological contaminants

The presence of very low levels of salmonella, E. coli and Listeria in ready-to-eat or processed foods is an important cause of foodborne illness. Due to the production process of mango puree, which normally involves thermal treatment (pasteurisation), the final product is not a frequent source of microbiological contamination. However, if mango puree is not kept under optimal storage conditions (e.g. at higher temperatures than recommended) or if it is placed on the market after the expiry date, the risk of contamination with bacteria and

fungus significantly increases.

## Labelling and product composition

Depending on the type of mango puree produced, the product must be labelled as “mango puree” or “concentrated mango puree”. If sweeteners are added, the words “sugar(s) added” must be included on the label. Information about bulk packaging has to be indicated either on the packaging or in the accompanying documents. Bulk package labelling must include the following information:

- Name of the product;
- Lot identification number;
- Name and address of the manufacturer, packer, distributor or importer;
- Storage instructions.

The lot identification number and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In case of retail packaging, product labelling must be in compliance with the [European Union Regulation on the provision of food information to consumers](#). This regulation specifies requirements for nutrition labelling, origin labelling, allergen labelling and clear legibility (minimum font size for mandatory information). Mango puree is not listed as a product which can cause allergies, but if case sulphites are used as a preservative (for example in mango products containing added sugar), sulphites must be indicated as a potential allergen (at concentrations of more than 10 mg/litre). However, sulphites are not frequently used in the production of mango puree products.

The composition and quality of fruit purees, including mango puree, are covered in a specific [European Fruit Juice Directive](#). It specifies the criteria which the various products must meet, including which fruits can be used, their minimum content, what ingredients can or cannot be added and how these products must be designated on the label. For example, the name “fruit juice” is reserved for products that have not been sweetened, whereas ‘fruit nectars’ are allowed to be sweetened. It must also be clearly indicated on the label if a product has been made from concentrated juice.

Regarding product composition, several pieces of European legislation lay down which food additives are allowed. The main piece of legislation is the European Union [food additives directive](#), but several more specific requirements are laid down for [enzymes](#), [flavourings](#) and [vitamins and minerals](#).

European importers sometimes face the problem of the undeclared addition of substances to mango puree. Examples include beets, corn or cane sugar or citric acid. This is illegal and therefore forbidden. Recent laboratory tests revealed the undeclared addition of food colouring (tartrazine and Sunset Yellow) with the aim to intensify the colour of mango pulp. Another problem is the false indication of the mango puree variety, which most commonly involves the indication of the use of an Alphonso variety (which is often more expensive than others), when another variety has been used in the production.

## Packaging requirements

Packaging used for mango puree must protect the organoleptic characteristics and quality of the product. It must protect the product from bacteriological and other contamination (including contamination from the packaging material itself). Packaging must also protect the product from moisture loss, dehydration and – where appropriate – leakage, as far as technologically practicable, and must not impart any odour, taste, colour or other foreign characteristics to the product.

### Tips:

Read more about MRLs on the European Commission [website on maximum residue levels](#). To be prepared for any new changes in the MRLs, read the [ongoing reviews of MRLs in the European Union](#).

Read more about the [key European legislation](#) relevant for mango puree on the website of European Fruit Juice Association.

Check and test your mango puree by following [analytical methods](#) published by the International Fruit and Vegetable Juice Association (available to subscribers).

Subscribe to the [Code of Practice](#) of the European Fruit Juice Association to obtain access to the [reference guideline](#) for mango puree and to many analytical methods used for quality control.

## What additional requirements do buyers often have?

### Quality requirements

The basic quality requirements for mango puree are defined by different parameters, of which the most important are:

- Brix level (sugar content of an aqueous solution): the Brix level of mango puree varies depending on the mango variety and production process. The Brix value is usually 13 to 24 (but most often 14 to 16) and 28 to 40 for concentrated mango puree. A high Brix value is preferred by the juice manufacturers.
- The acidity level influences the quality and price of the product. Acidity levels depend greatly on the variety of mangoes used for making the puree. The acidity level is commonly expressed as a percentage of citric acid and usually varies between 0.2% and 1%. In concentrated puree, the level may sometimes reach 3%.
- The Brix-Acid Ratio is another quality indicator and it varies between 37 and 50 for puree and is above 8 for concentrated puree.
- Taste, flavour and consistency. Characteristics such as taste or flavour are subjective and cannot be easily determined on the basis of physical characteristics. Those characteristics are influenced by factors like the variety, production season and production technology. Quality mango purees have higher a Brix level, more intense flavour and less fibrous consistency. Puree produced from the Indian Alphonso variety is perceived to be high quality and usually fetches the highest prices on the market, compared to other varieties such as Totapuri or others. However, the quality of Alphonso puree is also variable and depends on the production season, region in which the mangoes are produced and production process. Some European processors like to stick to the variety they know, to avoid changing their recipes.

### Packaging options

The most common bulk packaging option for mango puree is “bag-in-drum” aseptic packaging. This packaging is made up of polyethylene aseptic bags placed in drums. The drum sizes vary between 180kg and 275 kg, but most commonly between 200kg and 230 kg. Another type of packaging used mainly by the food service sector is “bag-in-a-box” packaging with smaller quantities ranging from 10kg to 20 kg, which are suitable for use by hotels, restaurants, smoothie bars etc.

New packaging solutions include bulk intermediate containers made of steel. This packaging eliminates the need for fumigation and heat treatment and also makes it possible to transport larger quantities of packaged purées per container, thus saving on transport costs. Still, this is not widely used by the major puree suppliers.

Different solutions are used for packaging puree in smaller quantities aimed at the retail segment. These include tins, laminated polyester bags, glass and plastic bottles, glass jars and special carton packaging for liquids, which is sometimes bears the name of the brand, such as Tetra Pak or Elopak. However, the direct export of mango puree to the European retail segment is not very common.

### Food safety certification

Although food safety certification is not obligatory under European legislation, it has become a must for almost all European food importers. Most established European importers will not work with you if you cannot provide

some type of food safety certification.

The majority of European buyers will ask for certification recognised by the [Global Food Safety Initiative](#) (GFSI). For mango puree, the most popular certification programmes, all of which are recognised by GFSI, are:

- [International Featured Standards](#) (IFS)
- [British Retail Consortium Global Standards](#) (BRCGS)
- [Food Safety System Certification](#) (FSSC 22000)

Please note that this list is not exhaustive and food certification systems are constantly under development. The majority of food safety certification programmes are based on existing ISO standards like [ISO 22000](#).

Although different food safety certification systems are based on similar principles, some buyers may prefer one system in particular. For example, British buyers often require BRC, while IFS is more common for German retailers. It should also be noted that food safety certification is only a basis from which to start exporting to Europe. Serious buyers will usually visit/audit your production facilities within the first few years of your cooperation.

In the fruit juice industry, the most recent development is [SGF certification](#), which is aimed at increasing safety, quality and fair competition in the fruit juice sector through industrial self-regulation. SGF certifies fruit processing companies, packers and bottlers and traders and brokers for fruit juices, as well as transport companies and cold stores in almost 60 countries worldwide.

For mango puree producers which supply the fruit juice industry, an important part of the SGF certification system is called IRMA ([International Raw Material Assurance](#)). For companies in the fruit juice industry that want to control the whole supply chain, the ideal situation would look like this: farmers are [GlobalGap](#) certified, fruit processors are IRMA certified and juice bottlers are certified by [IQCS](#) (International Quality Control System for juices and nectars). IRMA certification is also applicable for traders/brokers, transport companies, producers of semi-finished products and storage facilities, in addition to fruit processors.

## Corporate Social Responsibility

Companies have different requirements as regards social responsibility. Some companies will require adherence to their code of conduct or to common standards such as the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)) or Business Social Compliance Initiative code of conduct ([BSCI](#)).

### Tips:

Stick to the rules! With new laboratory testing methods, the addition of non-permitted sugars, water or other fruit in mango puree can easily be detected. It takes a long time and a lot of money to build a good reputation in the European market, but it can be lost very quickly if you are caught with adulterated or sub-standard products.

Obtain food safety certification. However, check with the importers and experts whether the food safety certification company you consult is respected by European Union buyers. Examples of independent internationally accredited certification companies include [SGS](#), [CIS](#), [TÜV](#) and [Bureau Veritas](#).

Read our study about [buyer requirements for processed fruit, vegetables](#) and edible nuts for a general overview of buyer requirements in Europe.

Do a self-assessment using the producer starter kit via the [BSCI website](#).

## What are the requirements for niche markets?

### Organic mango puree

To market mango puree as organic in Europe, the mangoes must be grown using organic production methods according to [European legislation](#) in this respect. Growing and processing facilities must be audited by an accredited certifier before you can use the European Union's organic logo on your products, as well as the logo of the standard holder (for example, the [Soil Association](#) in the United Kingdom or [Naturland](#) in Germany).

Note that importing organic products to Europe is only possible if you are in possession of an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the European Union has to be accompanied by an electronic certificate of inspection as defined in Annex V of the Regulation [defining imports of organic products from third countries](#). This electronic certificate of inspection has to be generated via the [Trade Control and Expert System](#) (TRACES).

### Sustainability certification

The two most commonly used sustainability certification schemes are [Fair Trade](#) and [Rainforest Alliance](#). Fair Trade international has developed a specific standard for [prepared and preserved fruit and vegetables](#) intended for small-scale producer organisations. This standard establishes protective measures for workers in mango puree processing facilities. In addition, the standard establishes the specific FairTrade Minimum and Premium Price for conventional and organic mango pulp. Aside from the international price, mango pulp prices are established for products from five different regions: Southern Asia, Caribbean, Eastern Africa and Zambia, South America and Western Africa.

Leaders in the fruit juice industry established [The Sustainable Juice Covenant \(SJC\)](#) with the global aim of making the sourcing, production and trade of fruit- and vegetable-derived juices, purees and their concentrates 100% sustainable by 2030.

With the support of the [European Fruit Juice Association](#) (AIJN), companies work together to increase social and environmental standards at the farming and processing stages by rolling out sustainability certifications throughout the supply chain. The AIJN established the [Juice CSR Platform](#) to support, guide and inspire juice stakeholders to integrate corporate social responsibility throughout the supply chain.

### Ethnic certification

The Islamic dietary laws ([Halal](#)) and the Jewish dietary laws ([Kosher](#)) impose specific dietary restrictions. If you want to focus on Jewish or Islamic ethnic niche markets, you should consider implementing [Halal](#) or [Kosher](#) certification schemes.

#### Tips:

Consult the [Sustainability Map database](#) for sustainability labels and standards.

Check the [guidelines for imports of organic products into the European Union](#) to familiarise yourself with the requirements of European organic traders.

Read our study on [Trends on the European processed Fruit, vegetables and edible nuts markets](#) for an overview of the developments in terms of the sustainability initiatives in the European market.

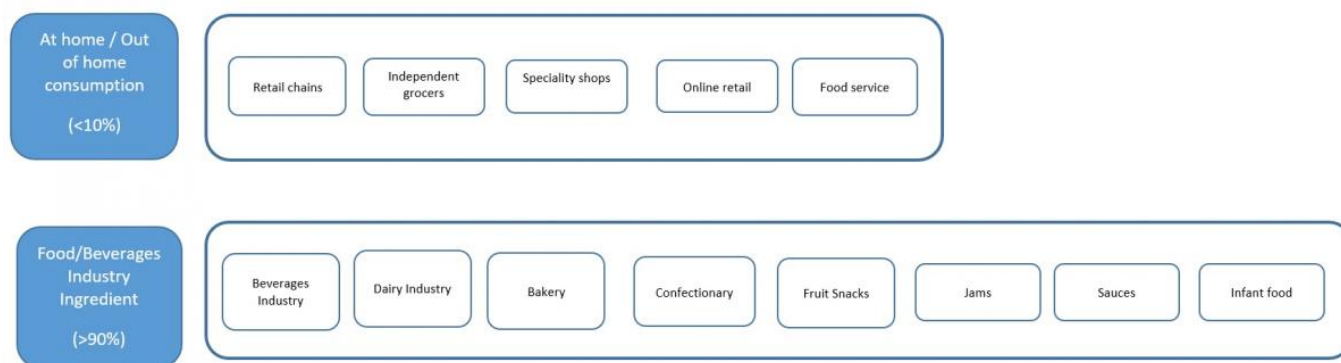
## 2. Through what channels can you get mango puree on the European market?

Mango puree is mostly used as an ingredient in Europe. Many players take part in the supply chain for the different segments of food processing industry. However, the largest quantities of mango purees are placed on the market by the specialised importers of fruit and vegetable ingredients. Those companies are mostly known as suppliers of the European beverages industry.

### How is the end market segmented?

The largest user of mango puree in Europe is the food processing industry, in particular the beverages industry. Mango puree is also used in various other segments as shown in Figure 1 below. At least 90% of imported mango puree is used by the food and beverages industry and less than 10% is sold in retail packaging without having undergone any further processing. The repacking of mango puree is done by specialised European companies, but sometimes retail-ready products are directly imported, mostly by suppliers of specialised Asian supermarkets.

Figure 1: End market segments for mango puree in Europe



### Food processing segment

The food processing segment accounts for the largest share of the European mango puree market. It is expected that this food processing segment will continue to grow, due to the popularity of mango flavour among European consumers. Several important product launches and developments are described in the trends chapter of this study. The most common final users of mango puree include the following:

- Beverages industry is the largest user of imported mango puree. There are three types of drinks in which mango puree is used as ingredient: fruit juices/nectars, smoothies and soft drinks. Juice blending and bottling companies use mango puree to create different flavours. Smoothies are a booming segment within the beverages industry, as mango puree is one of the most popular ingredients. Mango puree is also increasingly used in soft drinks such as energy drinks, sport drinks, iced teas and mineral waters with the addition of fruit juices.
- Dairy industry uses mango puree in fruit preparations used as ingredients for drinkable and spoonable yoghurts and ice creams. Normally, the dairy processing industry is not supplied by mango puree exporters directly, but via specialised food ingredient companies which are creating specific customised solutions. In those fruit preparations, mango puree is mixed with other ingredients such as sugar, glucose syrup, gelling agents, thickeners, flavouring, starch, acidity regulators etc.
- Bakery and confectionary industry uses mango puree as ingredient for cake fillings, pastries, chocolate snacks and more. Like the dairy industry, this segment is usually supplied by food ingredient companies. Fruit filling solutions for the bakery industry are usually made to be thermo stable (which means they can be kept at room temperature).
- Fruit snacks or bars are a new development in the European sweet snack segment. Fruit bars are a fast-growing category in Europe and several product launches are already described in other chapters of this study. Although many fruit bars use dried fruit as a main ingredient, they are also produced through

dehydration of fruit purees including mango puree.

- Jams and preserves industry is still a modest user of mango puree, but several mango-inspired products have appeared on the European markets, in [Spain](#), [France](#) and [Germany](#), for example. Apart from natural mango purees, the fruit spreads segment uses sweetened mango puree in a manner similar to the dairy and bakery industry.
- The sauces and condiments industry uses mango puree as common ingredient in “chutney” and “salsa” products. The chutney market is particularly developed in the United Kingdom with [Patak's](#), as the leading British and European brand.
- The infant food industry uses mango puree (very often organic), usually mixed with other purees and other ingredients for infant food products.

### Tips:

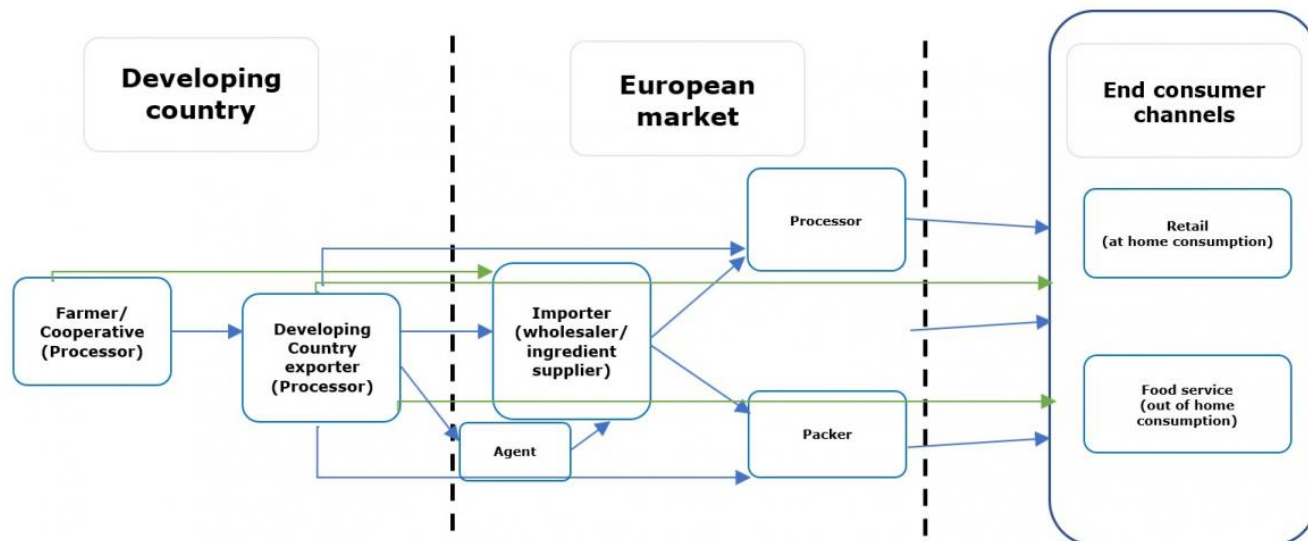
Search the list of exhibitors of the specialised trade fair [Fi Europe](#) to find potential buyers for your mango puree within the food ingredient segment.

Visit or exhibit at [ISM Cologne](#), the key European trade fair for sweets and snacks, to explore opportunities in fruit snacks segment.

## Through what channels does mango puree end up on the end-market?

Specialised fruit ingredient importers represent the most important channel for mango puree in Europe. There are also several alternative channels, such as agents, food processors or food service companies.

Figure 2: European market channels for mango puree



### Importers/wholesalers

In most cases, importers act as wholesalers. Sometimes, they only act as trading companies and resell imported mango puree without any further processing. Others also perform processing operations and create customised solutions for food industry users (as described in the segments chapter above).

Importers are usually quite knowledgeable when it comes to the European market and they closely monitor developments in mango puree producing countries. Therefore, they are your preferred contact, as they can inform you in good time about market developments and provide practical advice about your exports. Importers of mango puree normally import other types of ingredients such as concentrated juices and purees from other European companies and importers of fruit, frozen fruit, etc. So, offering other products in addition to mango



puree can increase your competitiveness.

For new suppliers, the challenge is to establish lasting relationships with well-known importers, as they usually already work with selected suppliers. Established importers perform audits and visit producing countries on a regular basis. Many new contacts find they must offer the same quality at lower prices than their competitors, at the start of the relationship.

The positions of the importer and food manufacturers are put under pressure by retailers. The higher demands imposed by the retail industry determine the supply chain dynamics from the top down. Pressure translates into lower prices but also into added value aspects in the form of “sustainable,” “natural,” “organic,” or “fair trade” products. As a result, transparency in the supply chain is needed. To achieve this, many importers develop their own codes of conduct and build long-lasting relationships with preferred developing country suppliers.

## **Agents/brokers**

The role of agents in the mango puree trade is not as significant, as in other processed fruit and vegetables sectors. Agents normally act as independent companies that negotiate on behalf of their clients and as intermediaries between buyers and sellers. Typically, they charge commissions ranging from 2% to 4% of sales for their intermediary services.

## **Food processing companies**

The food processing segment is described in the previous chapter. Although the majority of the processing companies are supplied by specialised importers, some of them may import mango puree directly. For example, some juice blending and bottling companies import raw ingredients (such as purees and fruit juice concentrates) directly.

Apart from the food processing sectors mentioned, it is important to note that specialised flavour ingredient companies use significant quantities of mango puree to produce customised flavour solutions. One of the largest companies in this field is the Swiss company [Firmenich](#), which uses mango puree as ingredient for the production of flavours and bases for soft drinks, alcoholic drinks, powdered soft drinks and carbonated soft drinks.

## **Retail channel**

Retailers rarely buy directly from developing country exporters. However, in some cases, developing country exporters (processors) pack directly for private label or even their own label brands, but it is very rare in the case of mango puree.

Fruit juice bottling and blending companies may specialise in the supply of private labels for retail channels. In many cases juice companies with established brand names also produce juices and nectars for private labels.

When it comes to specialised Asian supermarkets, mango puree can be sold directly as a branded retail product, created in the supplying country. Still, those products are usually not sold directly to Asian supermarkets, but via specialised suppliers of these retailers.

Recently, the retail sector has become increasingly polarised, seeing a shift towards either the discount or high-level segment. Consolidation, market saturation, fierce competition and low prices are key characteristics of the European retail food market. The leading food retail companies in Europe differ per country. The companies with the largest market shares are Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché and Ahold (Delhaize, Albert Heijn and several other brands).



## Foodservice channel

The foodservice channel (hotels, restaurants and catering establishments) is usually supplied by specialised importers (wholesalers). The foodservice segment often requires specific aseptic packaging called “bag in a box” which can be kept at room temperature. This packaging can be opened, allowing for frequent use of smaller batches, which can be suitable for juice bars, restaurants, hotels and pubs. Larger (often 20 kg) “[bag in a box](#)” packed mango purees are used by restaurants, hotels and the catering industry while [smaller packaging](#) (usually 1 kg) is used by pubs and cocktail bars.

World cuisines, healthy food and food enjoyment are the major driving forces in the foodservice channel in Europe. The fastest-growing business types tend to be new (healthier) fast food, street food and pop up restaurants, as well as restaurants serving international cuisines and juices/smoothie bars.

### Tips:

Search through the [list](#) of members of the European Trade Federation for Dried Fruit and Edible Nuts (FRUCOM) to find buyers from different channels and segments.

Understand the pressure from retailers for sustainable products, and increase your competitiveness by investing in different certification schemes related to CSR, organic foods or food safety. Having food safety certification is the minimum requirement if you want to tap into the retail segment.

## What is the most interesting channel for you?

Specialised importers seem to be the most useful contact if you aim to export mango puree to the European market. This is particularly relevant for new suppliers, as supplying the food processing industry or retail segment directly is very demanding and requires considerable investments in the area of quality and logistics.

## 3. What competition do you face on the European mango puree market?

### Which countries are you competing with?

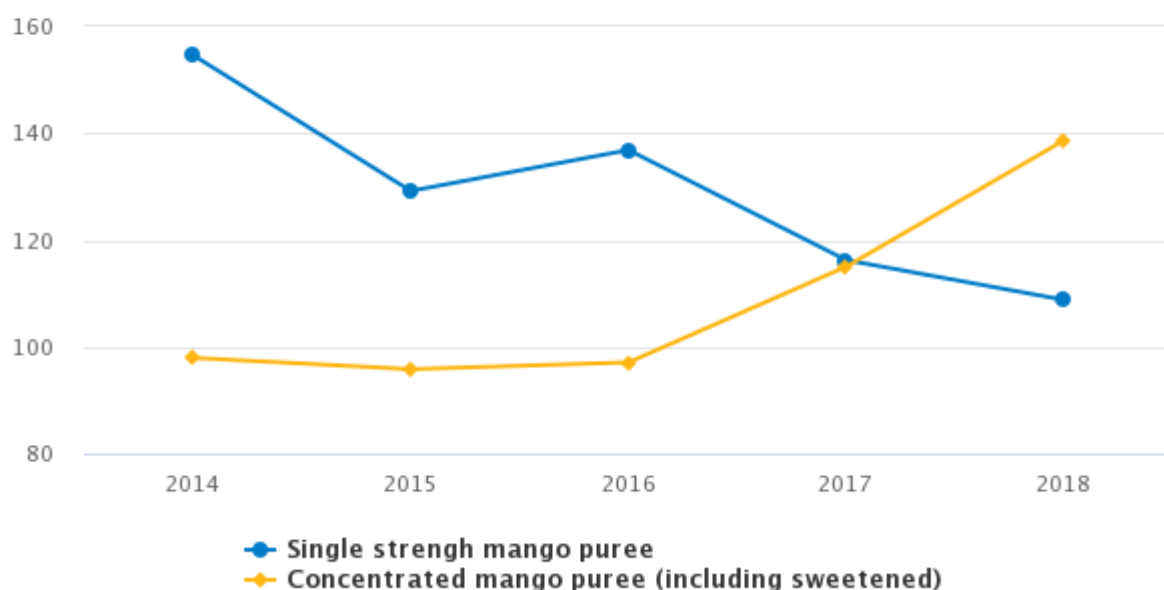
The main competitor for emerging mango puree suppliers in Europe is India. India supplies more than 70% of all mango purees to Europe. Several other countries which also have an established reputation on the European market are Brazil, Ecuador, Colombia, Mexico, Peru, Cuba and Ecuador. Emerging suppliers to Europe are Pakistan, Vietnam, Egypt and certain African countries. However, India’s share is increasing, especially over the last two years due to very competitive prices.

Please note that precise statistical data regarding trade and production is not available for most of the mango puree production countries. The only exception is India, which has developed a code for mango pulp but does not yet have a precise code for all forms of concentrated mango puree. In addition, some of India’s customs statistical codes are not harmonised with the codes used by the European Union and by the World Customs Organisation. The European Union does not have a statistical code for monitoring imports of mango puree. Therefore, the data presented here is based on a combination of the available statistical sources and estimations.

## India, the world’s leading supplier of mango puree

**Figure 3: Indian export of mango puree**

in tonnes



Source: ITC TradeMap

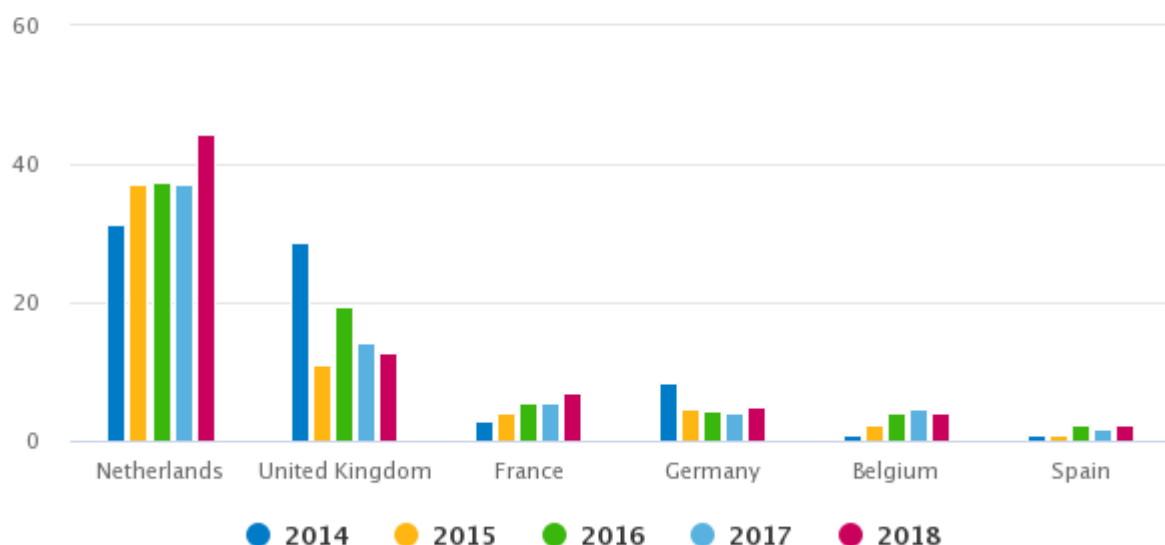
Mango puree can be produced with removing the water (single-strength puree) or through the physical removal of part of its water content (concentrated mango puree).

With a production of around 500,000 tonnes, India is the world's top producer of mango puree. Around half of this quantity is consumed domestically and the remaining 50% is exported. Saudi Arabia is the top importer of Indian mango puree (16% export share), followed closely by the Netherlands (15% export share). Together, these two countries import around one-third of total Indian supply. The main difference is that the Netherlands imports mainly concentrated mango puree while Saudi Arabia imports mostly single-strength puree.

As shown in Figure 3, until 2017, Indian exports mostly (around 60%) consisted of single-strength mango puree. However, in 2017 the export structure changed, and exports consisted primarily of concentrated purees. One of the reasons was the extremely large crop in the 2017/2018 season, which led to a decrease in export prices. In order to stabilise prices, more mangoes were processed into concentrated puree. Another reason was the increasing demand from China for concentrated puree. India increased its exports of concentrated mango puree to China from 31,000 tonnes in 2014 to more than 82,000 tonnes in 2018.

**Figure 4: Main European destinations for Indian mango puree, by volume share**

in tonnes

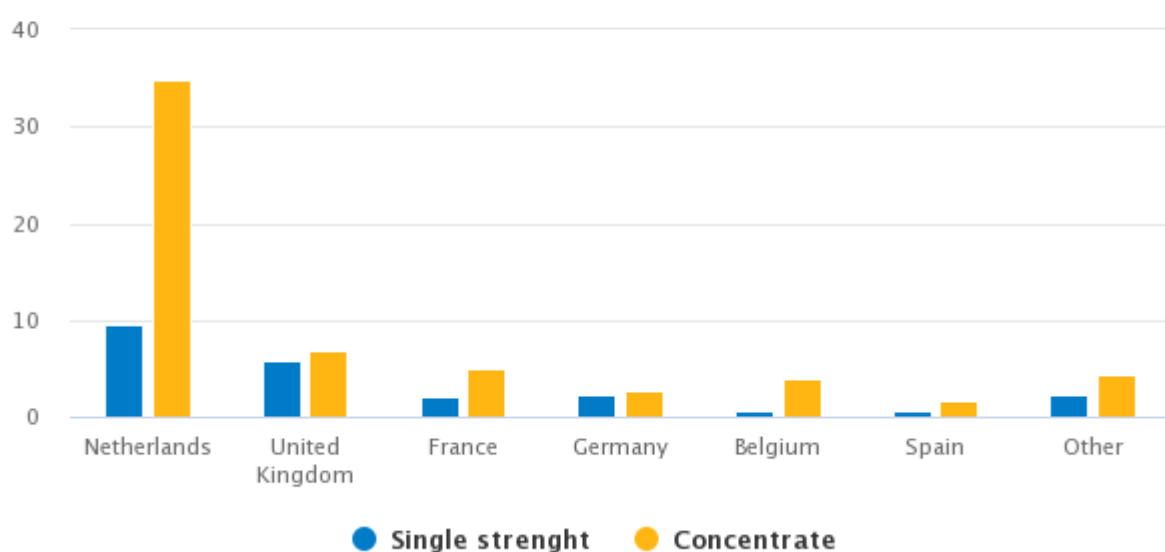


Source: ITC TradeMap

Around 35% of Indian mango puree exports go to the European Union. The Netherlands is the main export destination, accounting for more than 50% of total European exports, followed by the United Kingdom, France, Germany, Belgium and Spain. Poland is the fastest growing market for Indian exports to Europe, although the quantities are still very small. Indian exports to Poland increased 60-fold, from only 12 tonnes in 2014 to more than 770 tonnes in 2018.

**Figure 5: Indian export of mango puree to Europe by type, 2018**

in tonnes



Source: ITC TradeMap

Most of the Indian mango puree placed on the European market is concentrated mango puree. The Netherlands, as the leading importer, imports more than 80% of India's concentrated mango puree.

The processing of mango puree is carried out by more than 70 processing companies. The majority of the processors are located in the states of Andhra Pradesh (mostly in the Chittoor district) and Tamil Nadu (mostly in the Krishnagiri district). Some processors are also located in the states of Maharashtra and Gujarat. More than 100 mango varieties are cultivated in India but only few of them are processed in larger quantities.

The leading variety used for processing into puree is Totapuri (share of more than 70%) followed by Alphonso (share of less than 20%).

Other mango varieties in India used to produce puree are:

- Sidhura (with prices in between those of Alphonso and Totapuri);
- Kesar (substitute for Alphonso);
- Rumani (with lower prices than those of Totapuri); and,
- Neelam (substitute for Totapuri).

Alphonso mango puree is the reference for high Brix purees, fetching the highest prices, while Totapuri mango puree is a reference for lower Brix purees. Usually Totapuri (which is a cheaper variety) is used for blending in mixed types of juices and other beverages while Alphonso is used more in other processing industries due to its specific and prized flavour.

The Indian mango puree sector is supported by several Indian organisations. The [Agricultural & Processed Food Products Export Development Authority](#) (APEDA) provides financial and technical assistance to Indian mango processors in order to improve quality and export marketing. The [India Trade Promotion Organisation](#) (ITPO) supports the participation of Indian companies in the international trade fairs. The [Trade Promotion Council of India](#) (TPCI) supports the Indian government and companies by providing trade research and export promotion services.

## **Mexico**

With a production of around two million tonnes of fresh mangoes, Mexico has sufficient raw materials for processing into puree. Mangoes are collected for processing at the pacific rim of Mexico, from Chiapas to North Sinaloa. Several mango varieties are used for the production of mango puree. Some well-known varieties used for processing include: Manila Tommy Atkins, Ataulfo, Haden, Oro, Kent and Keith.

The United States is the leading market for Mexican mango exports and accounted for around 40,000 to 50,000 tonnes of exports. Frozen purees and concentrates make up a large proportion of mango puree exports from Mexico. Approximately 6000 to 7000 tonnes of the total production are exported to Europe. It is estimated that the leading importer of Mexican mango puree is the Netherlands, followed by the United Kingdom and Spain.

## **Brazil**

There is no data available concerning exports of mango puree from Brazil. According to our estimates, Brazil exports between 10,000 and 15,000 tonnes of mango puree, with the United States being the main destination (more than 3000 tonnes in 2018), followed by the Netherlands. Brazilian mango varieties used for processing into puree are Palmer, Tommy Atkins, Kent and Uba.

## **Colombia**

Mango puree exports from Colombia are estimated at around 10,000 tonnes, with the United States absorbing the largest proportion of Colombian exports. The key market for Colombian mango puree in Europe is the Netherlands. Magdalena is one of the leading mango varieties in Colombia used for processing into puree. The majority of the mango processing operations are concentrated in the North of Colombia (Atlántico Department).

## Peru

Exports of mango puree from Peru are estimated at more than 10,000 tonnes, with the United States as the largest export destination (importing around 40%), followed by the Netherlands. Varieties used for processing into puree are Chato de Ica, Criollo Edward, Kent and Haden. Chate de Ica is perceived as a high-quality variety and is comparable to India's Alphonso variety.

## Ecuador

Exports of mango puree from Ecuador are estimated at around 3000 tonnes. The leading varieties used for processing include Haden and Tommy Atkins, but Kent and Keitt are also used. There are around 15 to 20 mango-processing companies in Ecuador. Around half of these exports go to the United States while Europe imports a relatively small share of Ecuadorian exports.

### Tip:

Visit the website of [APEDA](#) to be updated about developments in the Indian mango puree industry.

## Which companies are you competing with?

Globally, there are many companies which make puree from mangoes. The production capacities of those companies vary greatly. Some companies process thousands of tonnes of mangoes and can be very price competitive. However, many small-scale processing operations produce high-quality mango puree. The companies mentioned below are only a few examples of successful mango puree exporters.

## India

[Jain Farm Fresh Foods](#), a subsidiary of [Jain Irrigation Systems](#), is the largest Indian and also the world's largest processor of mangoes. The company processes 170,000 mangoes per year. The key variety used for processing is the Totapuri mango, which accounts for about 100 tonnes. The majority of mangoes are produced on the company's own plantations and around 35% are purchased from farmers. The company has one plant in Jalgaon (Maharashtra) and two plants in Chittoor (Andhra Pradesh). Jain supplies mango puree to many international markets, including to big name companies such as Coca-Cola, Unilever, Nestle, etc.

Apart from producing mango puree, the company also processes several types of vegetables and spices (with huge processing capacities for onion and garlic dehydration). In 2018, Jain acquired the Belgian company [Innovafood](#), an important trading company in the area of dried vegetables and spices. This European presence has helped the company to penetrate European markets more easily.

In order to utilise large mango processing capacities, Jain Farm Fresh has developed the [Unnati](#) project. The aim of the project is to support farmers to increase mango yields through the use of the Ultra-High-Density Plantation (UHDP) technique. With high numbers of mango trees per hectare and modern agricultural practices, the farmers can increase their income.

There are many other successful mango puree exporting companies in India. Some notable examples include the following: [ABC Fruits](#) (another large processor with a processing capacity of 30 tonnes per hour), [Vimal Agro Products](#) (exporter and supplier of canned pulps on the Indian market), [Allana](#) (also a very large processor), [Mother Dairy](#) (milk processing company with fruit processing operations), [Tmn International](#) (one of the largest exporters), [Shimla Hills](#), [Lion Group](#), [Ghousia Food](#), [Jadli Foods](#), [Tricom Fruit Products](#), [Capricorn](#), [Galla Foods](#), [Keventer](#), [MR Fruits](#), [Sunrise Naturals](#) and [Sahyadri Farms](#).

## Mexican companies

[MexiFrutas](#) is the largest Mexican processor of mango puree with three processing facilities (located in Nayarit, Chiapas and Acaponeta). Apart from producing mango puree, the company is one of the rare companies able to produce clarified mango juice. Other Mexican mango puree companies and exporters include: [Frozen Pulps](#), [Interfruit](#), [Fruxo](#), [Citrofruit](#), [Puremango](#), [Valle Nuevo](#), [Altex](#).

## Brazilian companies

Examples include [Purea](#), [Vianectare](#), [Tropjuice](#), [Atlantica Foods](#), [Strauss](#), [Petrusz](#) (which has a subsidiary in Denmark).

## Colombian companies

[Compañía Envasadora del Atlántico](#) (CEA) is the largest exporter of mango puree from Colombia. CEA currently has five aseptic pulping lines and one frozen pulp and juice line, exporting to more than 37 countries around the world. CEA exports approximately 90% of all Colombian mango purees. Other Colombian mango puree companies include [Nutrium](#), [FLP](#), [SAS](#), [Mah](#), [Mankay](#) and [Productos Basicos](#).

## Peruvian companies

[Corporación Lindley](#) is a large trader of mango purees, although the company is known more for the retail brand Inca Cola, due to the fact that it is a subsidiary of the Coca Cola company in Peru. Other examples include: [Arca Continental](#), [Agromar Industrial](#), [Pacific Fruit](#) and [Agroindustrias](#).

## Ecuadorian companies

Examples include: [Quicornac](#), Tropifrutas (part of the [Passina](#) group), [Industrias Borja](#) and [Austrofoods](#).

### Tips:

Use the services of your national export promotion agency and actively participate in the creation of export strategies.

Visit major European trade fairs regularly to meet competitors and potential customers. Examples are [ANUGA](#), [SIAL](#) and [Food Ingredients](#).

Participate in the conference organised by the [International Juice Association](#) to meet mango puree producers, exporters and traders.

## Which products are you competing with?

A key substitute for mango puree is fresh mango, from which fresh puree can be extracted at home. In addition, other tropical purees and juices compete with mango puree on the market. Juice blending machines are very popular in Europe and consumers usually make their own smoothies from the fresh mangoes. It is also still not very common to buy mango pulp from European supermarkets for home consumption (with the exception of baby food).

### Tip:

Read CBI's [fresh mango study](#) to understand the mango industry and learn about promotional tools used by fresh mango suppliers.

## 4. What are the prices for mango puree?

Depending on the country, retail chain and brand, prices of mango puree sold to final consumers vary significantly across Europe. However, mango puree is not a common retail product, as explained above, and a breakdown indicating the differences between prices charged by farmers from developing countries and the retail prices of mango puree does not provide a reliable indication of export prices.

Export prices vary, depending on the country, season, variety, quality and exporting company. It is also difficult to compare prices for some varieties, which are rarely traded in the form of concentrated puree, with varieties which are traded as single-strength puree. For example, Alphonso mango puree is very rarely traded as a concentrate, as the removal of the extra water reduces the taste quality. In general, it can be said that concentrated Totapuri sells for about the same price as single-strength Alphonso.

The price of mango puree depends a lot on the Indian harvest. In years in which the harvest is good, prices go down and vice versa. Before the 2017/2018 season, prices for lower Brix purees (i.e. Totapuri or Tommy Atkins) ranged from \$1100 to \$1400 per tonne (CFR Rotterdam). Prices of Alphonso and other varieties with a higher Brix level generally cost around \$1500 per tonne CIF. However, in the last year, the price of mango puree has dropped significantly due to overproduction in India. In the previous season, the price for Totapuri was FOB \$700 per tonne and FOB \$1100 per tonne for Alphonso.

### Tip:

Subscribe to the [IEGVu](#) portal. This is one of the most respected market information services for food ingredients, including mango puree. Subscribers have access to overviews of mango puree export prices, which are published regularly and updated frequently.

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

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