Exporting mango puree to Europe

The European Union is the second-largest regional market for mango purée, after the Arabian Peninsula market. The estimated imports of mango purée to the European Union represent around 20% of the total world imports and the imports are increasing. The largest user of mango purée in Europe is the fruit juice industry, but it has applications in other segments such as ice cream or the baby food industry as well.

Contents of this page
1. Product Description
2. Which European markets offer opportunities for exporters of mango purées?
3. Which trends offer opportunities on the European market for mango purées?
4. Which requirements must mango purées comply with to be allowed on the European market?
5. What competition do I face on the European market for mango purée?
6. Through which channels can you get mango purées on the European market?
7. What are the end-market prices for tropical purées on the European market?

1. Product Description

Mango puree is a thick, smooth product which has been processed such that the insoluble fibrous parts of ripe mangoes (Mangifera indica) are broken up so as to be able to fit through a fine sieve. In some cases, the puree is pasteurised to increase shelf life. Fruit purees also retain all of the juice and a large proportion of the fibrous matter naturally found in the raw fruit. The terms pulp and puree are often used interchangeably, as they are here as well. Concentrated mango puree for use in the manufacture of Fruit Juices and Nectars is obtained by the physical removal of water from the mango puree in an amount sufficient to increase the Brix level (sugar-to-water mass ratio of a liquid) to a value at least 50% greater than the Brix value established for reconstituted juice from the same fruit. Majority of single-strength mango purees in Europe are sourced from South East Asia, principally India and Pakistan.

Refer to Table 1 for the trade classification. Selected Combined Nomenclature codes may involve trade of other tropical purees but they represent the most reliable official trade data in this moment. When ‘mango puree’ is referred to in this survey, it involves the selection of the products in the table below, unless stated otherwise.

<table>
<thead>
<tr>
<th>CN code</th>
<th>Product</th>
</tr>
</thead>
</table>
Please note that Combined Nomenclature codes include some specific codes defined on the 6-digit levels which include mango purées. However, those codes are not used in compiling trade statistics, as they include many other products and they would therefore influence the reliability of the data. However, the specific Indian national code for Indian mango pulp is used to present the majority of the mango purée supply to the European Union.

Product specification

The production process involves seven basic steps: washing, destoning, thermal treatment, homogenisation, de-aeration, pasteurisation and packaging. Mango purée is used as a food ingredient, primarily for juice and nectar manufacturers but also in dairy and bakery products. Mango purée can be sold as frozen or aseptic.

Quality

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

- Brix level (sugar content of an aqueous solution). The usual Brix level of mango purée is 13–18. Considering the Brix level of concentrated purée, the European Union Juice Directive defines a Brix level of 13.5 as a minimum for the production of reconstituted mango juice, which means that the minimal Brix content of purée must be above 20. However, major suppliers offer higher Brix levels in concentrated purées, usually 25–33.

Additional quality requirements:

- Acidity level influences the quality and price of the product. Acidity levels depend strongly on the variety of mangoes used in the production of purée, and vary between 0.2 and 1%. In concentrated purée, it reaches values up to 3%. Brix-acid Ratio is another quality indicator, varying between 37 and 50 for purée or above 8 for concentrated purée.
- Mango variety. The variety of the mango influences taste, Brix level and Brix-acid ratio. The most famous variety used for the production of purée is the Indian Alphonso variety, which usually reaches the highest prices on the market compared to other varieties such as Totapuri or others (Tommy Atkins, Haden, Uba, Kesar, Raspuri, Kent, Chato de Ica, Denise, Magdalena, Ica, and so on). One reason is that Alphonso has a more intense colour and flavour than other varieties, so it is more economic to use. Another reason is that manufacturers like to stick to the variety that they know in order to avoid changing their recipes.

Labelling

The product must be labelled as “mango purée” or “concentrated mango purée”. When sweeteners are added to the product, they have to be declared as “sugar(s) added”.

In the case of retail packaging, the product labelling must be in compliance with EU Regulation 1169/2011. This regulation entered into application on 13 December 2014, but the obligation to provide nutrition information will apply from 13 December 2016.

In the common case of export bulk packaging, the information required above must either be
placed on the container or be given in accompanying documents, except that “mango puree or concentrated mango puree” as well as the name and address of the manufacturer or packer must appear on the container. It is common that the product specification declares the Brix and acid level.

Packaging

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

The most common bulk packaging options are bag-in-box, bag-in-drum, drums or tins. The first two aseptic packaging types are acceptable by industry standards, although certain buyers may prefer one over the other. The drum sizes vary between 180 and 275 kg. Sizes of bags which are packed in boxes are usually 5, 10 or 20 kg for mango purées and 25 kg for concentrated mango purées. Bag-in-box packaging also provides the option of storing frozen mango purée for extended shelf lives.

2. Which European markets offer opportunities for exporters of mango purées?

The international trade statistics of mango explained below comprise all types of mango purée, including mango purée with added sugar. For now, there is no specific international statistical code covering only mango purée, so given statistics also include some share of other tropical purées.
**Imports**

European imports of mango purée continue to grow

- The estimated European market for mango purée within the European Union in 2017 was around 110,000 tonnes. However, while this quantity includes all types of mango purées, single-strength mango purée accounts for approximately 50,000 tonnes.
- Developing countries account for the largest share of the supply, while intra-EU imports represent only the processing and re-export of imported quantities, as Europe does not produce mangoes. The total import of mango purées (including intra-European trade) grew over the last five years at an average annual rate of 6%, reaching a value of approximately € 183 million in 2017.
- It is expected that the import of mango purée will continue to grow, led mainly by the expected economic development as well as the increasing needs for exotic flavours by European juice and soft-drink industry.

![Figure 1: European Union imports of mango purée (including sweetened mango purée, with some share of other tropical purées)](chart)

The Netherlands, the leading importer of mango purée in Europe

- The European Union import of mango purée is highly concentrated, as the Netherlands alone represents more than half of the total imports. Austria, a relatively small country with 1.7% of the population of the European Union, accounts for around 6% of the total imports due to the strong presence of the juice processing industry.
India, the leading supplier of mango purée to Europe
- India alone accounts for almost 60% of all supply of mango purée to Europe.
- South and Central American countries are gaining market share in Europe; particularly Mexico, Brazil, Ecuador, Guatemala, Cuba, Peru and Costa Rica.

**Figure 2: European Union imports of mango purée (including sweetened mango purée, with some share of other tropical purées) by country 2017**
in share of the imported value

![Figure 2: European Union imports of mango purée](image)

Source: Eurostat

**Figure 3: Indian export of mango pulp to European Union 2013–2017**
in tonnes

![Figure 3: Indian export of mango pulp to European Union](image)

Source: ITC TradeMap

Exports
The total European export of mango purée increased over the last five years at an average growth rate of 8%. Most trade represents intra-European trade. The largest exporters or re-exporters are the Netherlands, France and Germany.

The European export of mango purée to countries outside of the EU is insignificant.

Tips:

- In addition to targeting the main import hub, the Netherlands, consider diversifying your exports of mango purée to growing European markets such as Belgium, Austria and Germany. You can also diversify your exports to the largest importing countries such as Saudi Arabia.

- Compare your company with competitors from India as well as Mexico, which is an important supplier to the USA. Mexican companies are also looking for ways to increase their supply from the USA to the European Union.

- Carefully monitor mango crops in India, as years with a lower harvest mean that there is an increasing demand for mango purée from other developing countries, and a chance to open the market and establish a future position on the European Union market.

- Invest in product quality and use mango varieties with suitable product specifications. European buyers are constantly searching for new suppliers, especially in Africa and in Asian countries other than India, to reduce their dependence on Indian suppliers. However, new suppliers are only taken into consideration if they can supply mango purée of the high Brix level with intense colour and flavour.

Production and consumption

As European Union countries do not produce mango purée and due to insignificant external exports, the import data and trends represent quite accurately the European consumption of mango purée.
Due to their geographical location, European Union Member States are not able to produce mango purée, so production data are present only for the production (bottling and blending) of mango juices which are produced by the reconstitution of water from concentrated purée and with the addition of other juices. The largest number of fruit juice manufacturers is in Germany. Every second fruit company of the European Union, in total 375 companies, has its headquarters in this country.

Mango flavours have increased in popularity within the largest consumption countries. For example, its consumption has increased by nearly 4% in Germany in 2014, which is the largest fruit juice consuming country in Europe. It is interesting that mango flavour is particularly popular in Ireland and Portugal, where it is placed among the top 5 flavours. In Portugal, the market share of single-mango flavours was 12.3% in 2013.

The consumption of not-from-concentrate (NFC) juices is the only category of pure fruit juices with positive growth.

Tips:

- You can focus your exports on countries with the high production of juices such as Germany, but only if you are able to find bottling companies that are sourcing directly from processor, as it is very common that bottling companies buy purées from well-established European suppliers.

- More specifically, you can find information on the European fruit juice production and consumption on the website of the European Fruit Juice Association.

- Anuga trade fair is the best place to monitor market trends and to meet potential prospects in Europe. It is held in Cologne, Germany every two years. Another trade fair that is important to visit is SIAL, which is held in Paris, France every two years.

3. Which trends offer opportunities on the European market for mango purées?

A general overview of the most relevant general market trends for exporters from developing countries can be found on the CBI Trends for Processed Fruit and Vegetables. In addition, there are some remarks that can be made about specific products. More specifically, trends and developments are also described in our study of Tropical purées in Europe.

- Over the last five years, European Union imports of mango purée from India decreased slightly, but new producing countries are gaining in market share on the European market; particularly South American suppliers, but also emerging suppliers such as South Africa, Egypt or Ethiopia, so the market remained stable.

- Mango purée as an ingredient is becoming more and more popular, but much more in combinations with other juices than as a single-strength flavour. The majority of so-called “multivitamin” juices have mango purée as an ingredient, usually in combination with other tropical juices or with citrus and apple juices as a base. Another trend is a flavour which combines mango juice with coconut water or with aloe vera juice, satisfying the consumer demand for superfood juices. In addition to fruit juices, mango flavour is finding applications in almost all categories of soft drinks such as flavoured waters, carbonated drinks, energy and sport drinks, syrups and tea drinks.

- One of the risks in the future production of mango purée can be a stable supply of mangoes due to challenging factors such as global warming, hurricanes, tsunamis, droughts and floods. A drought in India heavily hit mango suppliers in 2014, so it can be expected that the price will rise, which can lower the consumption in Europe. Buyers are increasingly interested in mango
purée from Mexico, which is the primary supplier of the USA.

- According to the FoodNews interpretation of a Euromonitor report, the outlook for the consumption of fruit juices in western European countries is negative, as fruit juices have an “identity crisis”. Volumes are down for a variety of reasons and value growth is minimal. Health trends as well as perceptions of what is fresh and natural are changing, while ice teas, energy drinks and sport drinks have outperformed. However, NFC juices have a positive consumption growth trend.

- Mango juices are more and more frequently marketed as a “superfruit” which is rich in vitamins, minerals and anti-oxidants, while it also contains an enzyme with stomach-soothing properties similar to papain found in papayas.

- Initiatives in corporate and environmental responsibility are increasing in impact on EU markets. Particularly the Fairtrade market, organic market and functional foods market are growing.

- The demand for organic mango purée is continuing to increase. According to IFOAM, the European countries with the highest spending on the consumption of organic food are Switzerland (€ 189/kg annually per capita), Denmark (€ 159) and Luxembourg (€ 143).

Tips:

- European importers are searching for new sourcing countries for mango purée in addition to India, as there is a risk of high dependence in sourcing from one country. You can search for chances in many European countries, but especially in ones where mango purées have an increasing popularity, such as Germany, Ireland or Portugal.

- Exporters from developing countries can benefit from the current “healthy living” trend. The use of scientific medical research on proven health benefits is commonly used in the marketing of mango products.

- The use of the internet and social media are great opportunities to introduce your company and market mango purée on the European markets.

- World production and market trends can be monitored on the website and blog of International Mango Organisation.

4. Which requirements must mango purées comply with to be allowed on the European market?

For a general overview of buyer requirements in the EU, please refer to the CBI Buyer requirements for processed fruit and vegetables.

Specifically for mango purée, you can consult the EU Trade Helpdesk, where you can select mango purée under specific HS codes 20079993 and 20089948.

For information on commonly requested standards, check the International Trade Centre’s Sustainability Map, an online tool which provides comprehensive information on over 170 voluntary sustainability standards and other similar initiatives covering issues such as food quality or safety.

Legal requirements

A phytosanitary certificate must accompany every shipment (which will certify that the product is free of plant pests and diseases).

The composition and quality of fruit purées, including mango purée, are covered by a specific European Fruit Juice Directive. It specifies the criteria with which the various products must comply, 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. As an example, the name “fruit juice” is reserved for products which have not been sweetened, whereas “fruit nectars” are allowed to be sweetened. It must also be clearly indicated on the label when a product has been obtained from concentrated juice.

With the latest European Fruit Juice Directive, the EU Commission wanted to align the directive more closely to the Codex Alimentarius Standard for Fruit Juices. The description of nutritional and health benefits is now regulated by the Nutrition and Health Claims Regulation. This law requires that no nutrition claim or health claim may be used if it has not first been approved. It will in future also specify nutritional criteria (nutrient profiles) that products need to respect before a health claim can be made.

In case of repeated non-compliance of specific products originating from particular countries, they can only be imported under stricter conditions, such as having to be accompanied by a health certificate and an analytical test report. Products from countries that have shown repeated non-compliance are put on a list included in the Annex to Regulation (EC) 669/2009. At the moment (March 2016), there is no mango purée on the list.

Regarding the laboratory testing of mango purée, the most common problem that European importers are facing is the undeclared addition of beet, corn or cane sugar as well as the undeclared addition of citric acid, which is illegal and therefore forbidden. Another problem is a false declaration of the mango purée variety; in the most common cases, instead of the Alphonso variety, there is an addition of other varieties.

Labelling requirements
In December 2014, EU Regulation 1169/2011 went into effect. New labelling legislation forbids the misleading of consumers and attributing to any food the property of preventing, treating or curing a human disease. Another change is allergen labelling, where allergens have to be highlighted in the list of ingredients and requirements for information on allergens will also cover non-prepacked foods, including those sold in restaurants and cafés. Nutrition information is also mandatory for most products. However, mango purée is not on the obligatory list of allergens.

Common and niche requirements
Food safety certification is a common request by European Union importers. The most usual certification schemes accepted on the European markets are IFS, FSSC 22000 and BRC.

Environmental protection, Organic and Fairtrade certification schemes are becoming more and more popular in the European Union. For organic production, you can consider the IFOAM standard. The EU regulates organic food and drink produced and/or processed within the EU as well as organic goods from elsewhere (Commission Regulation (EC) No 1235/2008, with detailed rules concerning imports of organic products from third countries). These can readily be imported from non-EU countries whose rules on organic production and control are equivalent to the EU’s – currently Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Tunisia, Switzerland and the USA.

For all other non-EU countries, importers can have their organic products certified for import into the EU by independent private control bodies approved by the European Commission.

Tips:
- Refer to the Code of Practice of the European Fruit Juice Association for guidelines specifying Good Manufacturing Practices in the production of fruit juices and nectars. Ensure that any practices that you are using are legal in the European Union. For example, the use of cellulose in the European Union is not permitted, so you cannot use total liquefaction of the fruit to extract juice and sell it to European Union Member States.
- New laboratory testing methods can easily discover the addition of non-permitted sugars
and even the addition of different mango varieties by DNA analysis of mango purée. It takes a long time and a lot of money to build a good reputation on European markets, but this can be lost very quickly if you are caught with adulterated or “sub-standard” products.

- To find out the maximum residue levels (MRL) that are relevant for mango purée, you can use the EU MRL database, in which all harmonised MRLs can be found.
- Check with importers and experts whether the food safety certification company used is approved by European Union buyers.

5. What competition do I face on the European market for mango purée?

A general overview of the competition relevant for exporters from developing countries can be found in the CBI Field of Competition: Processed Fruit and Vegetables. Also read our Top 10 tips for doing business with European buyers.

The implementation of food safety systems and the regulatory laboratory testing of mango purée is just the first step in entering the European market. On the market, there is already a lot of competition in the form of substitute products and other companies of which you should be aware.

Product competition

A major substitute product for mango purée is fresh mango, from which fresh juice can be extracted at home. Other tropical purées and juices are also competing with mango purée on the market. Several industries use banana pulp to enhance the flavour of drinks and it is relatively cheaper than mango.

Juice bars, unpackaged juices and juice prepared at home have a clear advantage in the ability to convey natural ingredients or authenticity. Juice bars focused on lifestyle consumers with an interest in juicing or green juice as a meal replacement option are growing and they became a US$ 500-million segment in western Europe.

Company competition

Exporters of mango purée from developing countries should be aware of the main competitors from India and Pakistan, but also of competitors from growing processing industries such as Brazil, South Africa, Costa Rica, Mexico, Ecuador and Peru.

Tips:

- To be competitive with Indian suppliers, you can compete not only on the price and quality but also by offering better services and delivery terms, as buyers sometimes complain that delivery promises from Indian suppliers are not kept. Organic purée can be another field of competition, as there is no tradition of organic mango purée from India.

- You can try to diversify part of your offer with other tropical fruit purées if they are produced in your country, as tropical tastes are becoming popular in Europe. This is especially important for the current export season, when the world supply of mangoes is expected to be lower than average.

- Try to find data about competitors from other countries who are present on the European market. You can quickly make a selection by searching for export promotion organisations from competitors’ countries. The list of trade promotion organisations is available on the ITC website.
6. Through which channels can you get mango purées on the European market?

Figure 5: Common trade channels for mango puree berries on the European Union market

In the European Union, the majority of mango purée is used as an ingredient by the fruit juice and nectar industry. The most frequent use is in combination with other fruit juices which rarely have more than 10% mango purée. However, the purée is also used as an ingredient in desserts (jams, sweets), in the dairy industry (ice cream, yogurts) and in the baby food industry. Fruit juice producers rarely import mango purée directly and they rather source materials from specialised importers. Very often, specialised importers are at the same time fruit preparation producers.

Examples of different trade channels for mango purée in the European Union are the following.

- **Fruit juice and soft-drink producers:** Coca Cola, PepsiCo (Tropicana brand), Lactalis Group, Eckes Granini Group, Refresco Gerber, Conserve Italia, Rauch Fruchtsaft, Rubicon.

**Tips:**

- The retail segment, although it is smaller, can offer you the opportunity to sell mango purée as a final product.

- A high Brix level and a good Brix-acid ratio is of crucial importance for all fruit-processing segments; for exporters from developing countries, it means competitiveness on the market. However, if you want to gain higher market prices, you need to compare your offer with the Indian suppliers of the Alphonso purée variety. This variety commands the highest prices and is used when the best taste profile is needed.

- You can explore the possibility of supplying to the chilled drinks and smoothies segment on the market, which is increasing.
7. What are the end-market prices for tropical purées on the European market?

Indications of margins according to final retail prices for mango purée are not precise and exporters from developing countries can have only a very rough general overview of the price development. *Alphonso* mango purée is never traded as concentrate, as the removal of the extra water reduces the taste quality. As a rule of thumb, concentrated *Totapuri* sells at about the same price as single-strength *Alphonso*. The prices are also different between producing countries. The below examples are showing price developments in the 2015-2016 season:

- **India**
  - *Alphonso*, aseptic purée, 17 Brix, US$ 1550–1750/Mt, CFR Rotterdam
  - *Totapuri*, aseptic concentrated purée, 28 Brix, US$ 1300–1450/Mt, CFR Rotterdam

- **Mexico**
  - *Tommy Atkins*, aseptic concentrated purée, 28 Brix, US$ 1300–1450/Mt, FCA Rotterdam

- **Brazil**
  - *Palmer*, aseptic concentrated purée, 28–30 Brix, US$ 1380–1400/Mt, FOB Santos
  - *Tommy Atkins*, aseptic concentrated purée, 28–30 Brix, US$ 1350–1400/Mt, FOB Santos
  - *Tommy Atkins*, aseptic purée, 14–16 Brix, US$ 925–950/Mt, FOB Santos

- **Peru**
  - *Chato de Ica*, frozen purée, 14–16 Brix, US$ 1100/Mt, CFR Rotterdam

- **Colombia**
  - *Magdalena*, aseptic concentrated purée, 28 Brix, US$ 1400/Mt, C+F Europe

The first indication of prices for the 2015-2016 season shows that prices will be significantly higher due to the lower production in India.

Please review our [market information disclaimer](#).

Follow us for the latest updates

[Twitter](#)

[Facebook](#)

[LinkedIn](#)

[RSS](#)