

The European market potential for mangoes

Last updated:

21 December 2021

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

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for mangoes?](#)
3. [Which European countries offer most opportunities for mangoes?](#)
4. [Which trends offer opportunities on the European mango market?](#)

1. Product description

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

Fresh mangoes are available as:

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

Harmonized System (HS) code	08045000 Fresh or dried guavas, mangoes and mangosteen*
Commercial varieties	<ul style="list-style-type: none">• Kent (fibreless)• Keitt (fibreless, productive)• Palmer (minimal fibre)• Osteen (typical variety in Spain)• Tommy Atkins (long shelf life, fibrous but declining interest)• Amelie (Burkina Faso / West Africa)• Shelly (Israel)• Kensington Pride (originating in Australia)

Minor commercial varieties
(air freighted)

- Ataulfo (small Mexican variety)
- Nam Dok Mai (exotic variety from Thailand / Southeast Asia)
- Alphonso (India, mainly ethnic market)
- Kesar (India, mainly ethnic market)

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

Figure 1: Mango varieties Keith, Tommy Atkins and Kent (from left to right)



Source: OECD (2012), *Mangoes, International Standards for Fruit and Vegetables*, OECD Publishing, Paris

2. What makes Europe an interesting market for mangoes?

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

Fresh mango consumption increases annually as prices go down

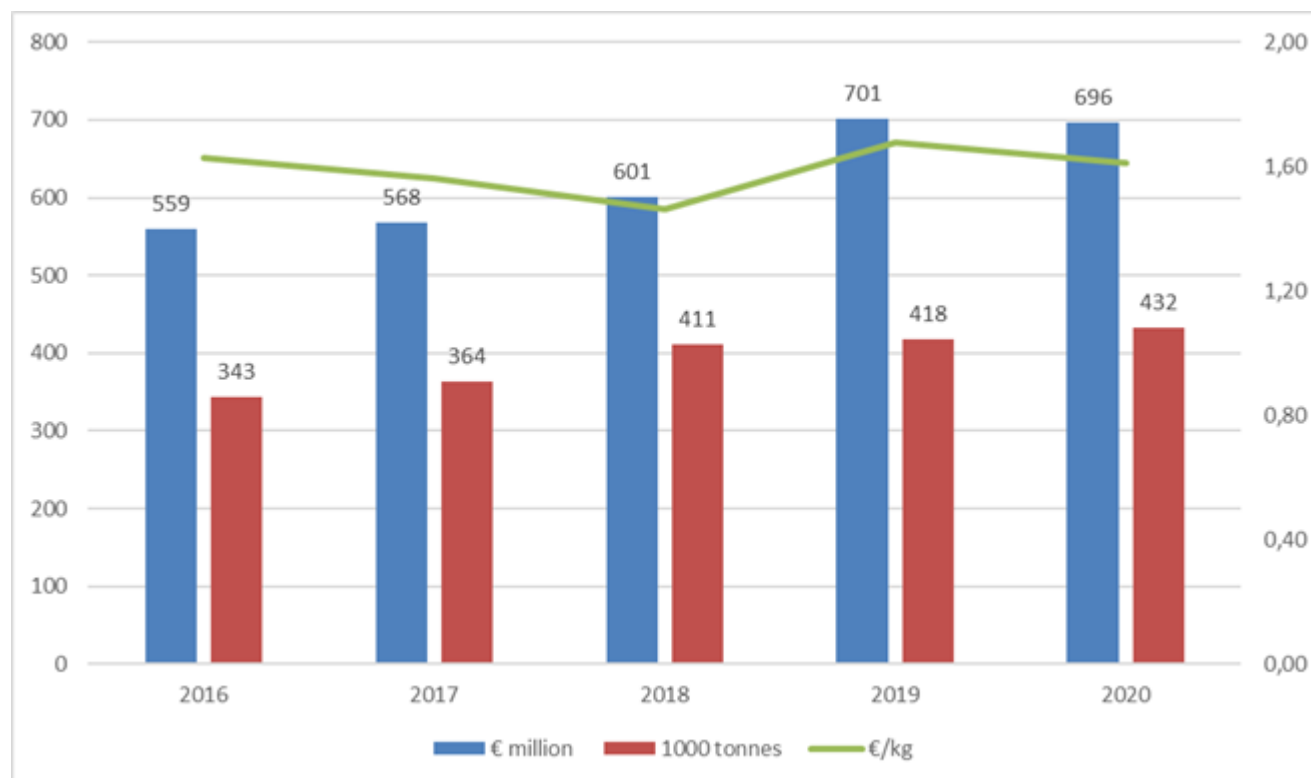
The mango market is unpredictable due to large fluctuations in supply volumes and, today, also due to shifting demand during the COVID-19 pandemic. But in the long term, the market continues to grow in size.

The average import price (value-weight ratio) went up in 2019 for the first time since 2015 due to periods with lower availability (see Figure 2). In 2020 the mango market and prices collapsed when numerous lockdowns and logistical problems occurred at the start of the COVID-19 pandemic. Still, European mango imports were able to increase to an estimated 432,000 tonnes in 2020, 14,000 tonnes more than the year before. The outlook for 2021 has shown a much larger availability, which was good for supermarket supply programmes, but wholesalers experienced overwhelming pressure on their selling prices.

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

The short-term supply volumes and prices can be volatile, but with global volumes increasing, mangoes with affordable prices become better accessible to European consumers.

Figure 2: European imports of mangoes (EU-27 + UK, incl. mangosteens, guavas)



Source: Eurostat / Access2Markets and ITC Trademap (data UK)

Tips:

- Maintain a long-term strategy when supplying the European market. Once you start supplying European clients, it is important to show continuity. To leave a good impression you should continue to show exportable mangoes even when prices are less favourable.
- Check regular news updates to see current developments in supply and demand, such as the 'Overview global mango market' on [Freshplaza.com](https://www.freshplaza.com). Other sources you can try to find market updates, include [Eurofruit](https://www.eurofruit.com) of [Fruitnet](https://www.fruitnet.com), [FruiTrop](https://www.fruitrop.com), and [FreshFruitPortal](https://www.freshfruitportal.com).

Mangoes are a popular fruit to source in developing countries

The mango trade depends heavily on countries with tropical climates. The annual growth from developing countries is a positive sign that growers are gradually improving fruit quality and supply reliability.

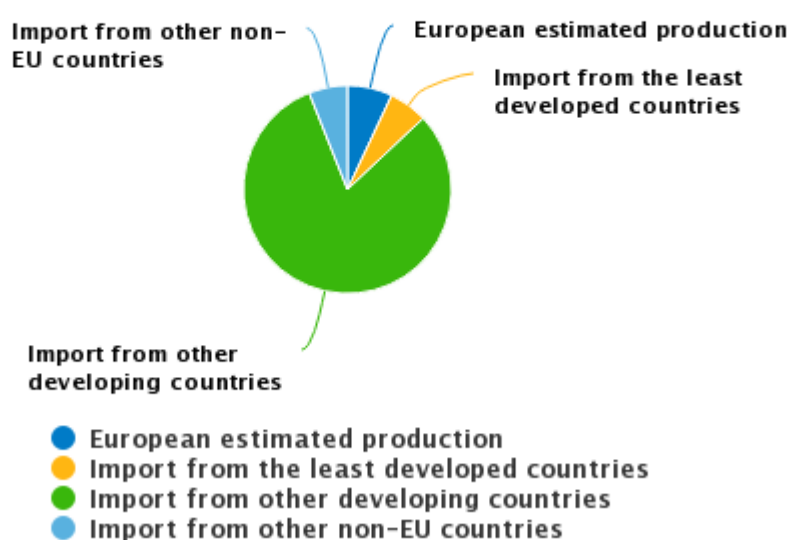
Developing countries are responsible for 88% of the total mango trade in the European Union (404,000 tonnes in 2020, including EU production), and for 94% of EU imports (see Figure 3). EU imports from developing countries reached 352,000 in 2020, of which the least developed countries had a market share of 25,000 tonnes. Mango imports from developing countries increase every year. The long-term import growth from other non-European suppliers, mainly Israel and the United States, has flattened.

Due to different climate zones and short harvest periods, there is not one single country or mango variety that can offer a long supply season. That is why different varieties and production sources are needed to assure

continuity. The production campaigns in these tropical countries are not always stable. Temporary shortfalls and oversupply (due to overlapping seasons) sometimes result in an erratic supply market. This volatility and the need for multiple suppliers make it difficult for traders to fill supply programmes with major buyers.

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

Figure 3: Origins and their share in mango volumes traded in Europe in 2020 (EU-27; incl. mangosteens, guavas)



Source: Eurostat / Access2Markets

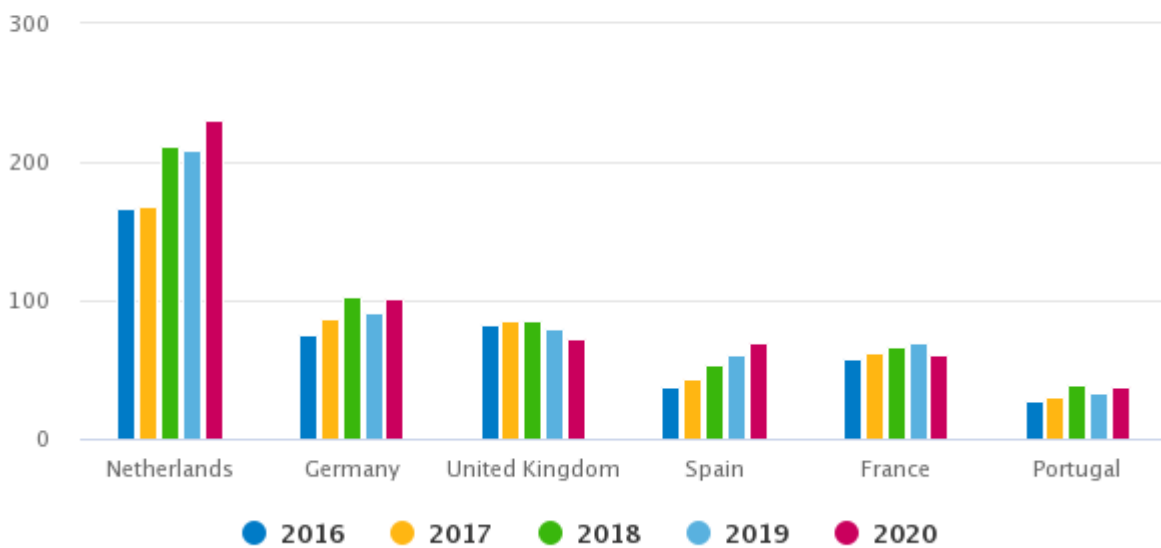
Tips:

- Increase your chances in Europe by providing both a reliable and quality supply. Make sure to do whatever you say you will be doing, and be honest about the volume and quality you can offer. Communicate proactively with your buyer whenever you expect quality issues. Any success you appear to have by making things seem better than they actually are will be short-lived.
- Reduce your risks in the mango trade by diversifying your markets (focus on both local and export markets).
- Find out how to apply the best quality management for mangoes by reading the '[Mango postharvest best management practices manual](#)' on [Mango.org](#).

3. Which European countries offer most opportunities for mangoes?

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

Figure 4: Import development of mangoes (incl. mangosteens, guavas) per country
in 1000 tonnes



Source: ITC Trademap

The Netherlands: your main trade hub for mangoes

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

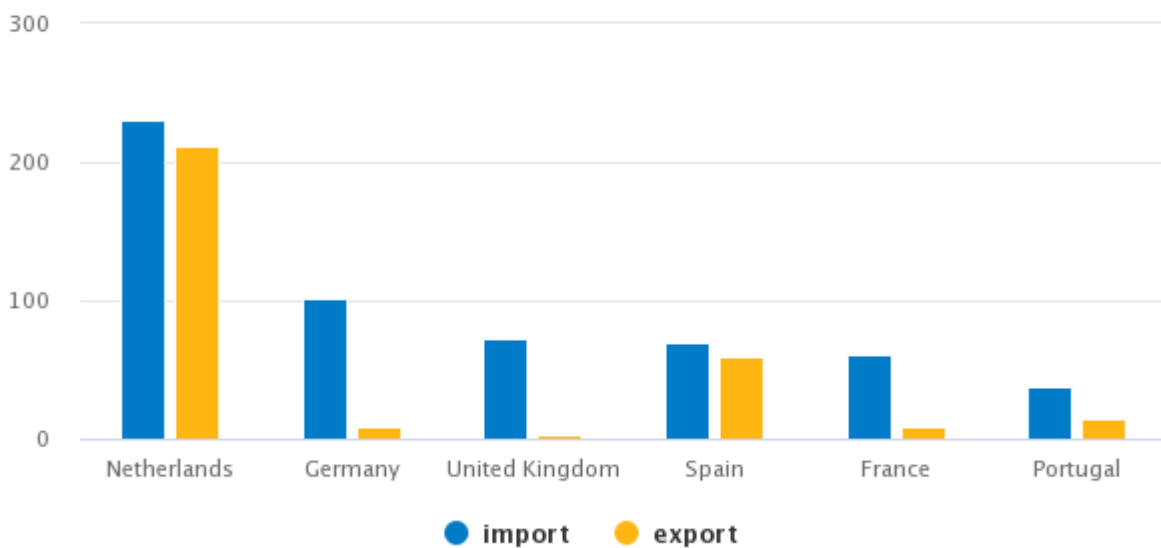
Around 33% of all mangoes in Europe are imported in, or traded by, the Netherlands. The Dutch mango exports of 212,000 tonnes are nearly as high as its imports (230,000 tonnes). This confirms their important role in the distribution of imported mangoes. Most mangoes in the Netherlands are re-exported to Germany (43%) and France (11%). The rest of the mangoes are divided mainly between the United Kingdom, Belgium, Scandinavia and Switzerland. For the same reason you can find a relatively large number of experienced traders in the Netherlands. These traders are familiar with the quality and sustainability standards of different European retail chains.

Dutch traders buy from a wide selection of suppliers. Just like in other European markets, most imports come from Brazil (89,000 tonnes in 2020) and Peru (80,000 tonnes), but several thousand tonnes are sourced in a variety of countries such as Ivory Coast, Dominican Republic, Mali, Senegal, United States and Israel. Dutch traders try to meet a year-round demand and sometimes include some of the more exotic mango varieties such as air-freighted Nam Dok Mai and Ataulfo.

The Netherlands itself offer a medium-large market for mangoes. Mangoes are generally sold by supermarkets and increasingly as convenient freshly cut products (see trends below). But it is because of the challenges in sourcing mangoes and the logistical experience which will allow the Netherlands to maintain its leading role in the import and re-export of mangoes for several years to come.

Figure 5: Imports and exports of mangoes (incl. mangosteens, guavas) per country in 2020

in 1000 tonnes



Source: ITC Trademap

Tip:

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

Germany: your largest destination market for mangoes

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

Mangoes are still often considered an exotic fruit in Germany, but they are becoming more popular. With more and more consumers becoming familiar with mangoes, demand can continue to grow in coming years. In 2020 Germany had an estimated mango consumption of 92,000 tonnes (imports minus exports). At 101,000 tonnes, the import volume in 2020 is on track again after the reduced availability in 2019.

Future developments on the mango market in Germany depends on how supply and compliance will be managed. As an exporter you must take into account the strict supply criteria. Poor food safety and pesticide residues are a deal breaker for supermarkets, while most consumers buy mangoes based on price and appearance. Taste is not always the most direct concern, but consumers will not repeat their purchase after a bad experience. There is also a growing consumer group that prefers organic mango, which are commonly higher priced. At the moment Spain is one of the main suppliers of organic mangoes. Supplying a product that lives up to the high German standards and expectations can be a challenge for exporters.

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

Tip:

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

United Kingdom: convenience is dominant

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

Right after Germany, the United Kingdom is the second-largest importer of mangoes in Europe. Nearly 73,000 tonnes were imported in 2020 and import volumes have been stabilising over the past five years. The stabilisation is a result of a maturing market. Brexit (the United Kingdom leaving the European Union) and the COVID-19 pandemic have not been favourable for mango demand either.

Current developments are mostly focused on diversification such as tree-ripened and premium mango, [freshly cut mangoes](#) (see trends below), but also on other added-value products such as frozen [mango lollies](#) and [ice cream](#) produced by the company Blue Skies. Another specific market segment is the ethnic mango market: the United Kingdom offers an important market for specific mango varieties from Pakistan and India such as the air freighted Alphonso and Kesar mangoes.

Pakistan and India are the third and fifth non-European mango suppliers after Peru and Brazil. Throughout the year 2019, Pakistan and India supplied 8,500 and 4,400 tonnes respectively, while Peru and Brazil exported 14,600 and 11,700 tonnes to the UK. However, the ethnic mango imports temporarily declined in 2020 by 40% due to the reduced air-freight from these countries. Only Brazil was able to increase its supply in 2020 to a volume of 17,400 tonnes.

Brexit, COVID-19 and the low value of the British pound may put further pressure on the mango market and impact mango prices. But it can also result in more direct imports from origin countries as trade benefits with the European Union member states may diminish.

Tips:

- Make the United Kingdom your priority market when you want to export Indian mango varieties. The United Kingdom is by far the best market for mango varieties such as Alphonso or Kesar.
- Find British mango traders in the [trader search option of UK Trade Info](#) (Search in commodities for mango with HS-code 080450). You can also check the [Exim World United Kingdom buyer and importer directories](#) to see which British companies are importing mangoes mainly from India.

France: an interesting market for West African suppliers

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

French mango imports in 2020 got stuck at 61,000 tonnes, almost 10,000 below last year's volume. But with limited exports, France has positioned itself as the third-largest consumer market in Europe. Because of the historic connection, West Africa has a relative high export volume of mangoes to France. For example, Ivory Coast and Senegal exported respectively 5,500 and 2,400 tonnes to France in 2020, which is not much less than major suppliers such as Peru (18,400 tonnes), Spain (12,000 tonnes) and Brazil (8,500 tonnes).

The preferred varieties are Kent and Keitt, the same as in the rest of Europe. But you can also find Amelie mangoes from Burkina Faso and tree-ripened mangoes shipped by air in the Carrefour supermarket, and not just in the high-end catering segment. Another opportunity can be found in an organic label; organic food sales have grown significantly according to the Research Institute of Organic Agriculture (FiBL).

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

1. Peru has entered the market with force during the European winter season and increasingly competes with the start of the West African season. Trade statistics show an increase of 40% from Peru between 2016 and 2020.
2. France has a strong preference for locally produced fruits (see also trends below). This means the mango supply from neighbouring Spain is relatively high and is expected to remain strong, but you can also expect competition from local summer fruits such as French-grown stone fruit.

Tips:

- Check the [seasonal calendar of northwest Europe](#) to see which fruits are possibly competing with your mangoes. Where possible try to plan around these seasons or export when prices for local seasonal fruit are still high.
- Go to [Rungis wholesale market](#) when you are visiting France. This will be a good reference and starting point when you want to enter the French market.

Spain: one of the fastest-growing markets for mangoes

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

For non-European suppliers Spain can be a competitor, a destination market with a growing consumption and a potential partner to reach other European markets.

Spain as producer and consumer

According to [Spanish news sources](#), Spain produced 28,276 tonnes of mangoes in 2020 with Osteen as the main mango variety. Spanish consumption is believed to be increasing, but is still behind that of Germany and the United Kingdom in consumption per capita. A large part of the Spanish harvest is exported. Within Europe, Spain has the luxury of still being competitive even when their prices are slightly higher. Many European retailers prefer European mangoes to imported ones.

Spain as a trade hub

Spain exports more than the domestic production volume, adding somewhere between 20,000 and 30,000 tonnes in re-exported mangoes. This makes Spain the second largest trade hub for mangoes after the Netherlands. The import is expected to keep increasing to fulfil the local consumption and complement the Spanish season. The main suppliers in 2020 were Brazil (43,700 tonnes) and Peru (16,300 tonnes), while Spain's most important export markets are Portugal (24,000 tonnes) and France (15,200 tonnes).

Table 1: Spanish estimated production, trade and consumption of mangoes in tonnes

	2018	2019	2020
--	------	------	------

Import	53,510	60,590	70,302
Production (estimate)	36,000	25,000	28,276
Export	61,580	47,207	59,491
Consumption (calculated)	27,930	38,383	39,087

Source: ITC Trademap & industry sources

Tip:

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

Portugal: the country with the highest consumption per capita

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

An estimated net import volume of 22,700 tonnes (import minus export) indicates that the average person consumes around 2.2 kilos per year. Spain is by far the largest supplier to Portugal, followed by the Netherlands for re-exports and Brazil, which exports both sea- and air-freighted mangoes. Supply gaps are mainly covered by mangoes that are traded through the Netherlands. Portugal has a strong connection with Brazil and offers limited direct opportunities for suppliers from other regions.

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

Tip:

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

4. Which trends offer opportunities on the European mango market?

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

Freshly cut and ripened mangoes attract more consumers

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

for the consumer. As an exporter you can add value through processing or increase your chances by supplying the right quality fruit for ripening.

Tree-ripened and ready-to-eat mangoes

Tree-ripened and air-freighted mangoes provide the best taste, while ripening in the destination country offers the consumer with a more economical alternative.

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

Freshly-cut mangoes

Mangoes for fresh cutting are also picked ripe. They provide convenience and quality at the same time. That is why this segment is growing, especially in countries with high demand for convenience products such as the United Kingdom and the Netherlands. But the southern European countries Spain and Italy are also pushing this market. Getting perfectly ripened mangoes to European consumers will require exporters to maintain a perfect quality control.

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

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

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

Figure 6: Dutch supermarket promotion of freshly cut mangoes from Brazil, "ripened under the sun"



Photo by Fruit Consultancy Europe

Tips:

- Check the ins and outs of freshly cut fruit in the [FAO Technical Guide for the Processing of fresh-cut tropical fruits and vegetables](#).
- Respect [international labour standards](#) and implement a [HACCP management system](#) when you are planning to process and hand-cut fresh mangoes. To meet European expectations you will need to invest in food safety, human resources and professional mango growers. It is crucial to organise all aspects well, because only doing half of the required work does not provide you with a market in Europe.
- Stay up to date with innovations in packaging and freight solutions to make freshly cut mangoes more sustainable.

Growing preference for local in-season fruit

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

The main drivers for consumers to eat local, seasonal produce is the idea that it is more fresh and sustainable, because there is less transportation involved. But price can also be a factor to buy local. According to fruit companies it is sometimes difficult to supply tropical or exotic fruit when there are many local seasonal fruits on the market, because local products are often cheap and abundant. The complexity and costs of logistics during the COVID-19 pandemic have given buyers an extra reason to buy local fruits as long as they are available.

Local sourcing also offers retailers better control over the supply chains and more transparency. A better

controlled and shorter supply chain results in a better-quality product. That is why, for example, the [Carrefour Group](#) is initiating a transition to promoting mainly local, seasonal and organic products.

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


Tips:

- Read the [CBI Trends in fresh fruit and vegetables](#) to get more insights into fresh trends.
- See the study [Entering the European market for mangoes](#) to learn more about competition.


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

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

Follow us for the latest updates

(opens in a new tab)  Twitter

(opens in a new tab)  Facebook

(opens in a new tab)  LinkedIn



[RSS](#)