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# *SRD Market Intelligence Brief™* **MANGO PULP**

in Europe and the U.S.

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This *Market Intelligence Brief* presents a simplified analysis of the mango pulp and juice market in the EEC and the U.S.

Though the majority of mangoes are consumed in the fresh form, there is a growing market for mango in processed form. International production of mango juice is estimated at 50,000 tonnes of single strength juice and 20,000 tonnes of concentrate 28 Brix.<sup>1</sup> The latest estimates of world trade in mango pulp put the total at 21,402 tonnes in 1986. Like the fresh mango market, the market for mango pulp, puree and juice has good potential for growth, being used principally in mixtures with other fruits, for yoghurt and multi-fruit drinks.<sup>2</sup>

India is easily the largest producer of mango pulp, followed by Brazil and Peru. Exports from India of mango pulp rose from 14,750 tonnes in 1982-83 to 20,299 tonnes in 1985-86. This was followed, however

by a fall in exports the next year to a level of 9,861 tonnes.

Exports into the EEC have risen steadily from 686 tonnes in 1983-84 to 1,794 tonnes in 1986-87. The major destinations in the EEC appear to be the Netherlands, which is principally a transhipper, and the U.K.

In the U.S. market, the Philippines, India and the Dominican Republic are the major suppliers. Due to transport cost, quality grades and duties, differences in prices are significant. Average prices of imports in the U.S. in 1988 were: (per tonne)

-\$470 from the Dominican Republic

-\$900 from the Philippines

-\$1,680 from India.

Total imports of pulp into the U.S. fluctuated from 1,834 tonnes in 1985 to 1,398 tonnes in 1987 and 1,650 tonnes in 1988. The reduction in volumes appears to be in response to higher prices.<sup>3</sup>

World trade in mango juices has been assessed at over 23,774 tonnes in 1983, with India supplying 14,281 tonnes of that total. Taiwan was once a major supplier but has gradually reduces exports, while Pakistan has entered the trade with irregular and low volumes. The most was 134 tonnes to Saudi Arabia in 1984.<sup>4</sup>



### Mangoes, Guavas & Mangosteens into Germany, France and the U.K.

A brief report in Foodnews of February 16, 1990 reports that mango pulp prices in "recent years have been relatively stable, ranging between US\$1,200 to \$1,350/tonne CIF Europe for the premium quality Alphonso 16-18 brix". It also mentions that due to a short supply which showed up toward the end of the '89 season spot prices went as high as US\$1,400.

Apparently the last shipments are usually made near the end of the year leaving a gap before new crop deliveries which arrive in May. This was not the case, however, in 1990, with '89 crop still available for between US\$1,250-\$1,300/tonne CIF for Alphonso 16-18 brix. Prices ranged from \$600-650 CIF for Tutapuri 15 brix.

While the mango crop in India for 1990 was expected to be good, supplies of mango pulp from Brazil were expected to be reduced.

Peru has apparently become a major supplier to Europe, especially with the Haden and Chato de Ita varieties. Offers in February 1990 for 1989 supplies were in the range of \$900/tonne C&F for single-strength Chato de Ita variety. Poor weather, however were expected to reduce the 1990 crop.<sup>5</sup>

Although accurate statistics for mango juice and pulp are not available, a review of fresh mango imports into Europe may be illustrative of general trends in the overall mango trade. Figure 1 presents annual volumes of mangoes, guavas and mangosteens into Germany, France and the U.K. Mangoes represent the largest portion in this category. Clearly mango consumption is increasing in all three of these major markets. The U.K. was the largest importer during the five year period analyzed.

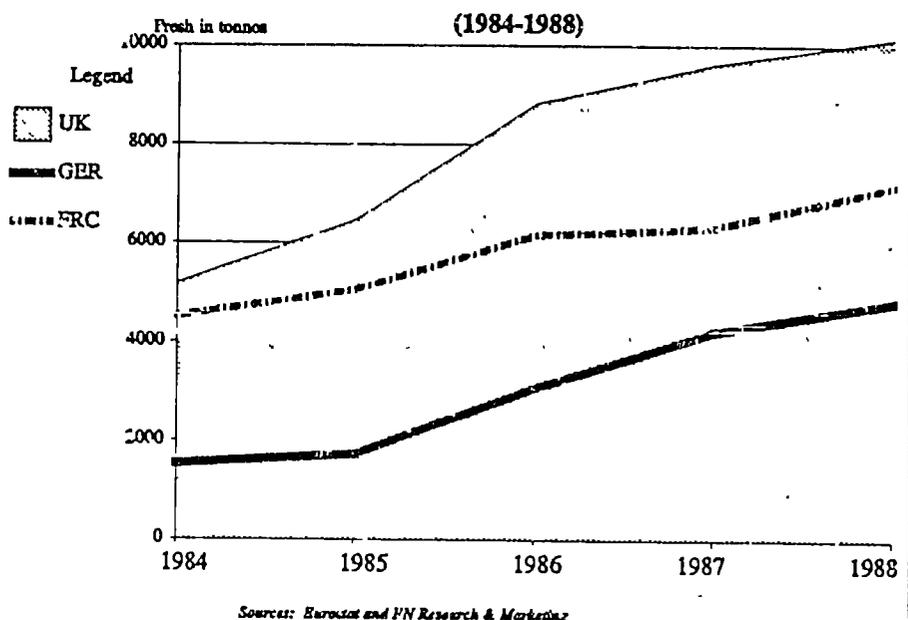


Figure 1: Imports of Mangoes, Guavas & Mangosteens into Germany, France and the U.K. 1985-1988

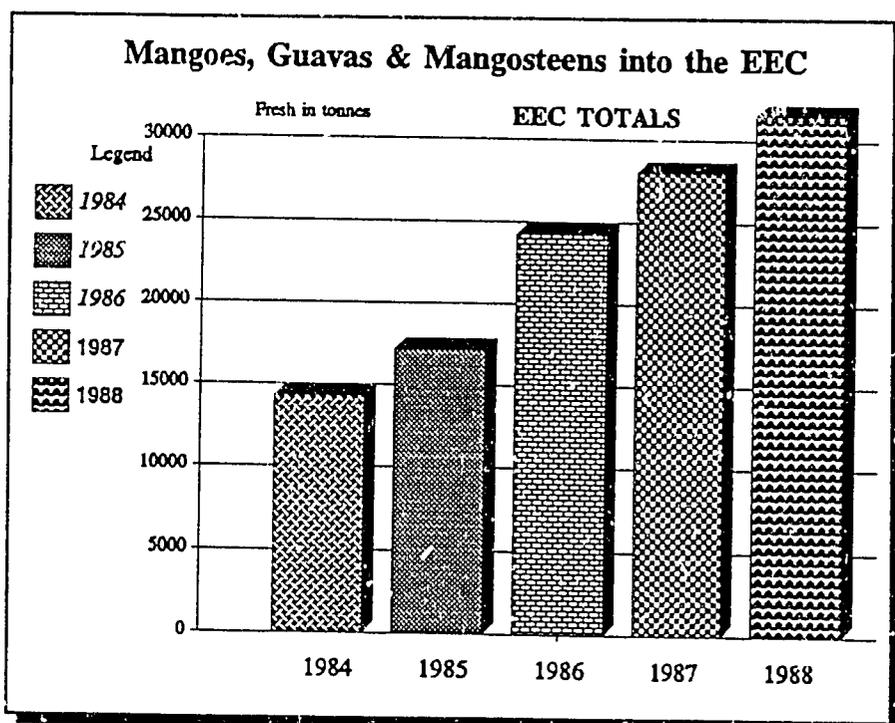


Figure 2: Imports of Mangoes, Guavas & Mangosteens into the EEC 1985-1988.

Figure 2 covers the same time period for the whole EEC market. Total imports of mangoes, guavas and mangosteens reached over 30,000 tonnes in 1988, with a distinct increasing trend. By comparing both Figures 1 and 2 it appears that the three markets targeted represent roughly two thirds of the total EEC market.

1. TROPICAL FRUITS/FRESH/PROCESSED, Karine Yourassowsky, FN Research & Marketing Limited..England Nov. 1989, pg 9.
2. Ibid.
3. Ibid.
4. Ibid, page 11.
5. FOODNEWS, February 16, 1990, page 5.

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