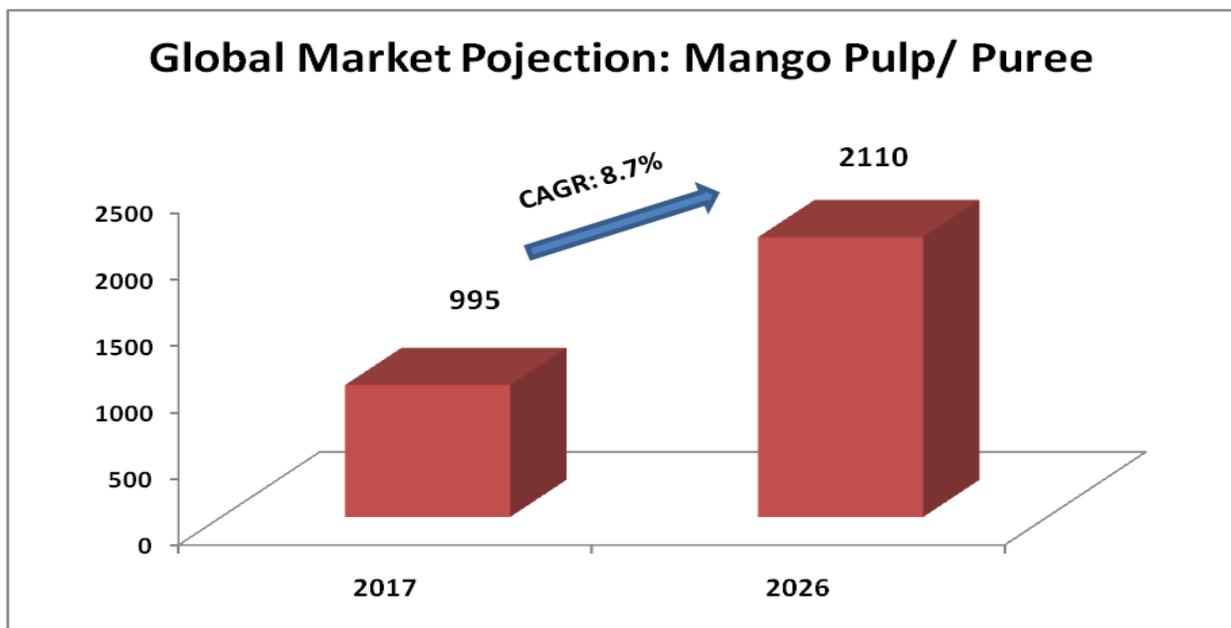




Market intelligence Report: Mango Pulp

Global Mango Puree Market is estimated to reach \$2110 Million by 2026

The Global Mango Puree Market is accounted for \$995 million in 2017 and expected to grow at a CAGR of 8.7% to reach \$2110 million by 2026.



In terms of consumption and import, the Middle-East region leads the market, followed by the European Union with over 20% of total world imports. The largest user of the mango puree in Europe is the fruit juice industry, but it also has applications in other segments such as ice cream and baby food industry as well.

Consumption pattern across globe: The Driving force in the growth of Mango Pulp market.

<p>Increased product demand from the beverage industry in the coming years.</p>	<p>Mango pulp based smoothies are in large demand amongst the consumers, which is likely to positively leverage the mango puree market in the upcoming future.</p>	<p>Organic mango puree is in higher demand by consumers owing to growing awareness regarding the usage of organic products.</p>
<p>Several large-scale food producers have introduced products based on mango puree into the market.</p>		<p>Growing consumption of flavoured yoghurt in various regions across the globe is projected to further support the growth of mango puree market.</p>
		<p>Juice industry and fresh market has shown consistent interest in both fresh mango and its processed products.</p>

Opportunities for exporters of Mango pulp

Asia Pacific held the maximum market share of approximately 37% in 2018. Majority of global sale was driven by countries like India and China which are among the largest producers of the fruit in the world. India accounts for more than 45% of the global mango production, making it the market leader in production and exports.

North America is anticipated to witness the fastest growth over the forecast period owing to increasing consumer preference for organic mangoes. Orange is the widely consumed fruit across the U.S. However, the global prices for orange have grown up. This is pushing the manufacturers to invest in other fruit-based juices and pulps.

Middle East and Africa is one of potential markets since countries like UAE and Saudi Arabia have increased their fruit-based imports due to measures taken by the government to create awareness related to healthy eating habits. Moreover, the demand for dried mangoes is expected to witness a significant rise due to their longer shelf life.

USA

- The US juice industry and fresh market has shown consistent interest in both fresh mango and its processed products.
- The US juice industry has been making more and more use of mango pulp in its orange juice blends.
- The popularity for mango in the US market can be attributed to two reasons:

- I. Firstly, mango is new for the US consumers, who have begun to develop a taste for it.
- II. Secondly, the US orange juice industry has been blending mango pulp for its natural sweet content that balances the acidity in orange juice.

Orange juice is the major fruit beverage consumed in North America. However, high consumption of orange juices has been linked to an increase in acidity levels of the body due to the natural citric acid content of oranges. As a result, consumers are shifting their preference from orange drinks to mango drinks, positively influencing the processed mango products market growth.

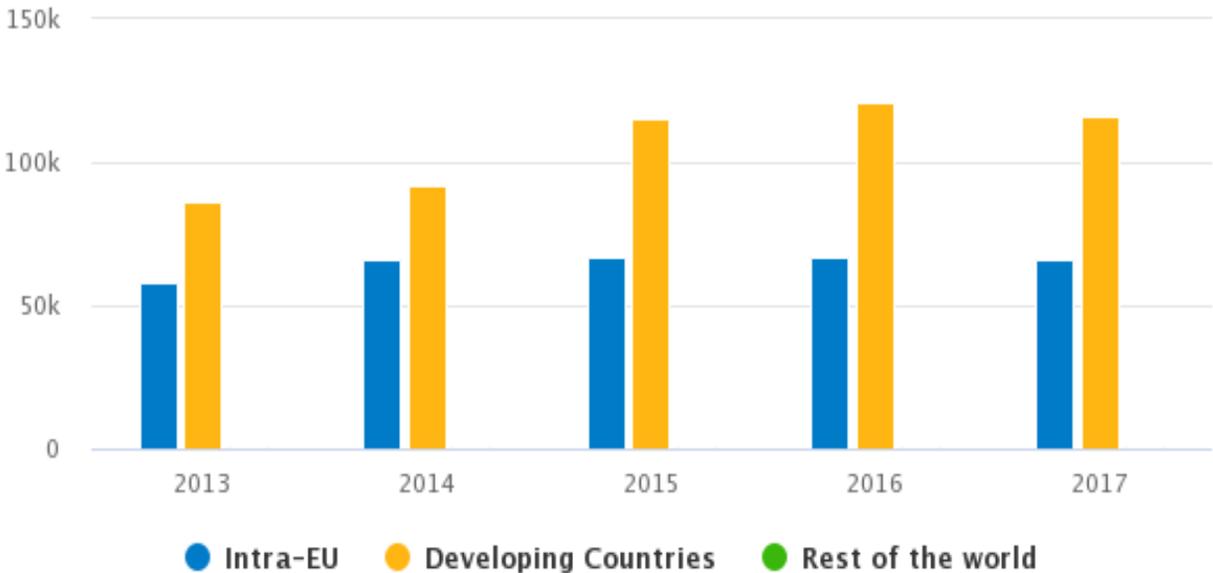
European Markets

- 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 the European juice and soft-drink industry.

The Netherlands, the leading importer of mango purée in Europe.

Belgium and France are quite particular and conscious about the quality, taste, colour of the product preferring Alphonso puree only. German customers prefer low acidity, not so strong colour, and are open to procuring South variety of Alphonso with some mixing of other variety also.

Figure 1: European Union imports of mango purée (including sweetened mango purée, with some share of other tropical purées)
in € thousand

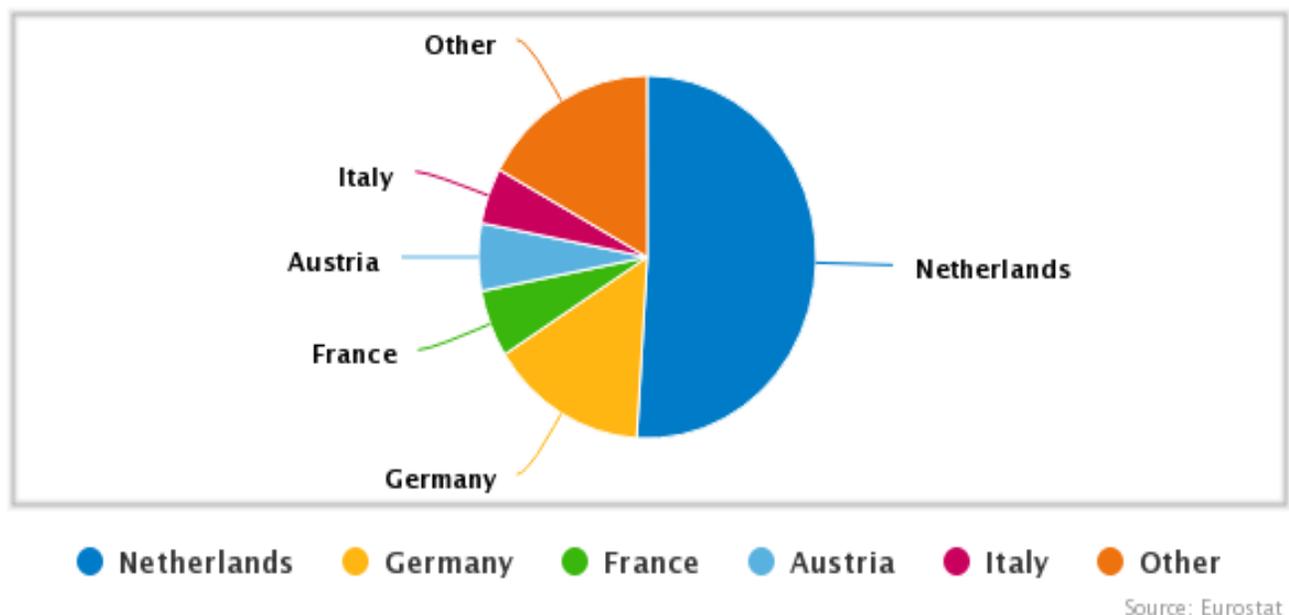


Source: EU Tradehelpdesk

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.

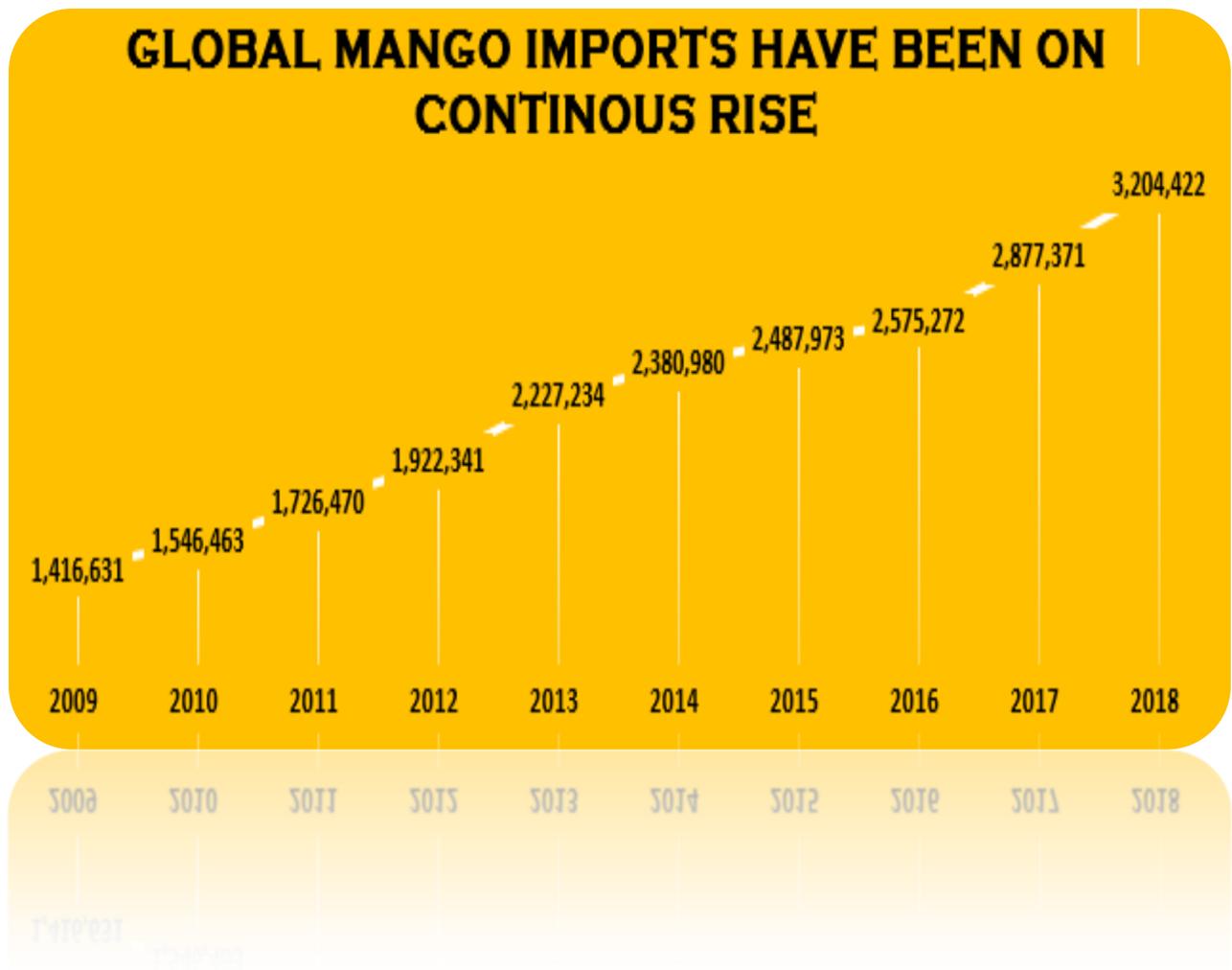
Over the last five years, European Union imports of mango purée from India decreased slightly, but new producing countries are gaining in market share on the European market; particularly South American suppliers, but also emerging suppliers such as South Africa, Egypt or Ethiopia, so the market remained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

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

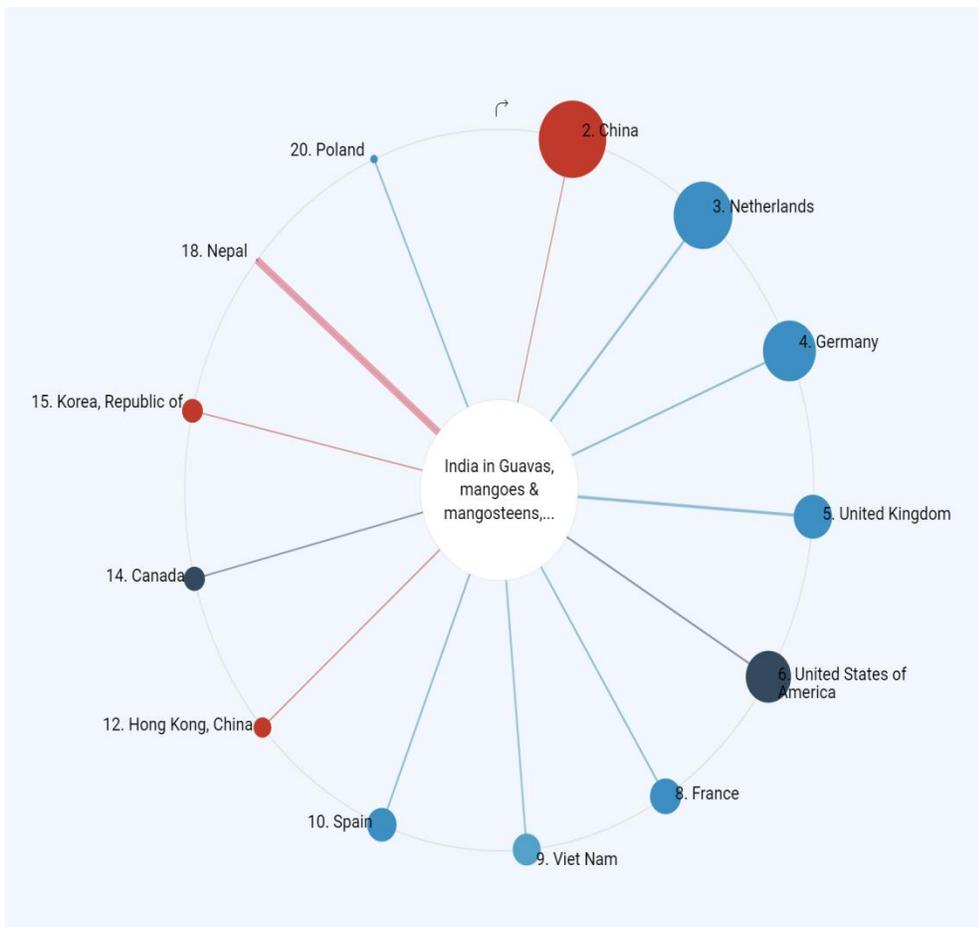
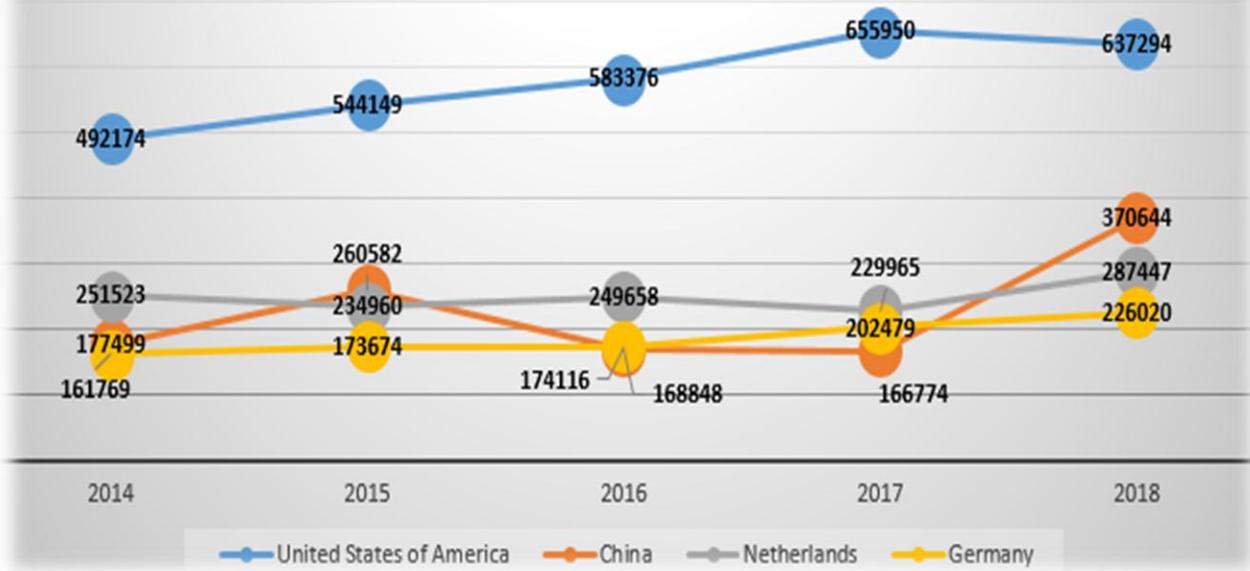


Global demand for Mangoes & Mango Pulp is increasing (values in 000' USD)

This growth in mango exports from India would remain sustainable for years to come considering the growing import demand of fresh mangoes in the world. Global demand of mangoes which was meagre 1.4 USD million in 2009 have been facing a continuous rise reaching a promising figure of 3.2 USD million recently giving huge potential for Indian mangoes to capture the rising global demand.



TOP GLOBAL IMPORTERS OF MANGO



Markets with potential for India's exports of Guavas, mangoes & mangosteens, fresh or dried

- Legend
- 1,2,3 Export potential rank
 - Demand
 - Ease of trade
 - EU & West Europe
 - East Asia
 - North America
 - ASEAN
 - South Asia

ITC Export Potential Map
<http://exportpotential.intracen.org>

India's Competitive Analysis

Exporters of mango pulp should be aware of the competitors from growing processing industries such as Brazil, South Africa, Costa Rica, Mexico, Ecuador and Peru.



Countries in South America posing lot of competition and causing loss of our market share are Brazil, Mexico, Colombia, Peru, Chile and Gautemala. Their processing varieties are Kent, Haden, Tommy Atkins, and Magdalena River. Kent and Haden quality can be compared equivalent to our Totapuri pulp whereas the fourth variety (fruit found exclusively on the Atlantic coast of Colombia) is somewhat similar in quality of Alphonso having premium price.

Competitive varieties from South America

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

Africa is also pitching up in Mango pulp export

Countries in Africa which are encroaching upon global market share are Kenya, Egypt, Tanzania, Uganda, Nigeria, Mozambique, and Ivory Coast. Their processing varieties are Keitt, Tommy Atkins, and Haden etc.

Exports to Oman, Saudi Arabia, and United Arab Emirates during the Season (November to April). The huge unit of Del Monte accounts for majority production of Mango pulp from Kenya.

Over the last 10 years, our export of Mango pulp to Egypt has reduced drastically since they have started growing their own varieties and also supply to several Middle East nations at comparatively lower prices than us.

Competitive varieties from Africa

Keitt: a Floridian variety with medium to large fruits (500-700 g), oblong in shape. Green-yellow-pink coloration, with a pastel tinge. Numerous small yellow lenticels. Firm, juicy orange flesh, with thin unobtrusive fibers. Good taste quality. A productive end-of-season variety. Widespread in Latin America and Africa. It often tops up the export campaigns after Kent.

Haden: a Floridian variety with medium fruits (350-550 g), rounded in shape. Yellow and red coloration with lenticels. Not very productive. Yellow-orange flesh, slightly sour. Good taste quality.

South America & Africa have huge Farms size producing homogenous quality of fruit for pulping whereas the average orchards in India are merely 4-5acres only. Since they are able to supply in huge bulk volumes as compared to us, both Latin American & African nations offer cheaper price to the importing countries thereby capturing considerable share in our target countries gradually. Also they do not have to incur any duty while exporting to EU whereas India has to bear 3.8% duty (for AMP/TMP/KMP) and 6% duty (for concentrates) under the impact of REX scheme.

While it's important to understand the growing markets globally, it is equally important to understand the consumption pattern of mango in these importing countries.

It's not just fresh mangoes but also allied products

While the global demand for fresh mango is on rise; trade in mango allied products gives an equal great opportunity due to continuous increase in consumption of mango and mango-based products coupled with rising preference for naturally sweet fruit-based ingredients. This comes out true especially for processed mango products, wherein the recent global market size is estimated at USD 16.55 billion further projected to register a growth rate of 6.4%. Additionally, the global mango puree market has been currently valued at around USD 950 million is expected to grow by 7.7% and is expected to reach approximately USD 2,120 million by 2024. This is especially true for organic mango puree segment which is expected to dominate the global mango puree market.

The major factor that is likely to support the growth of the mango puree market is the increased product demand from the beverage industry in the upcoming years. Various large-scale food producers have introduced products based on mango puree into the market. Various companies, such as Starbucks, McDonald's, etc., largely use fruit purees in their smoothies. These smoothies are in large demand among the consumers, which is likely to positively leverage the mango puree market in the future. Moreover, increasing consumption of flavored yogurt in various regions across the globe is anticipated to further support the growth of this market. The organic mango puree is in higher demand by consumers due to growing awareness regarding the usage of organic products. Alternatively, increasing product applications in various segments, such as ice cream and baby food, is expected to create many growth opportunities for the key players operating in the global mango puree market in the future.

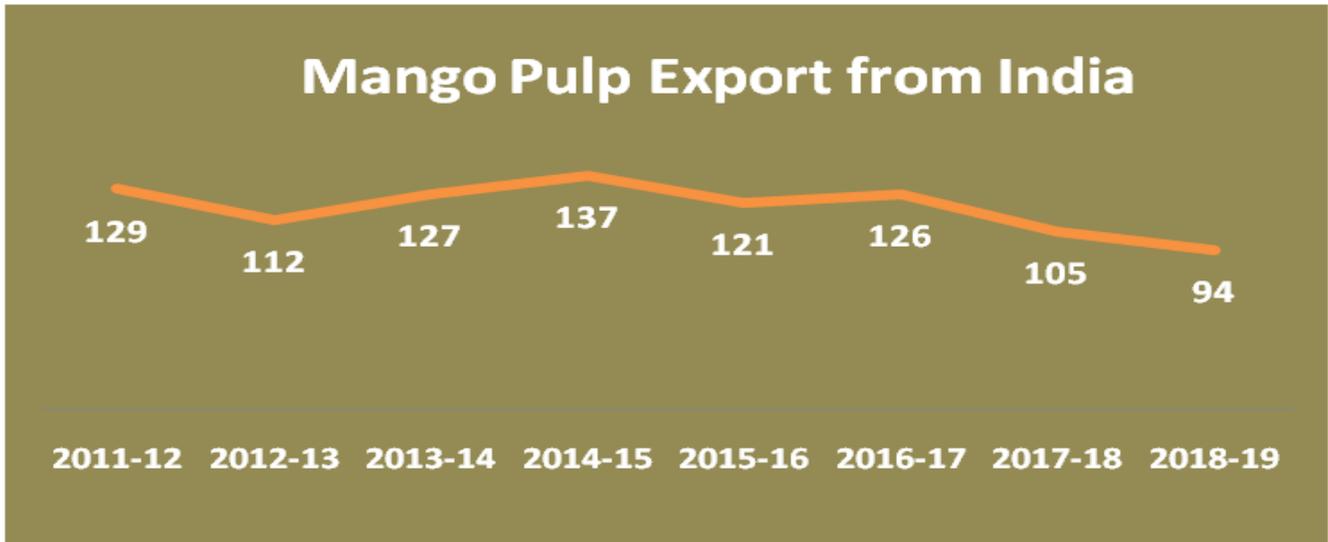
Why should you pick up Mangoes Pulp for exports?

“We are relaxed since we have ample export surplus for you to pick up the mangoes for exports”

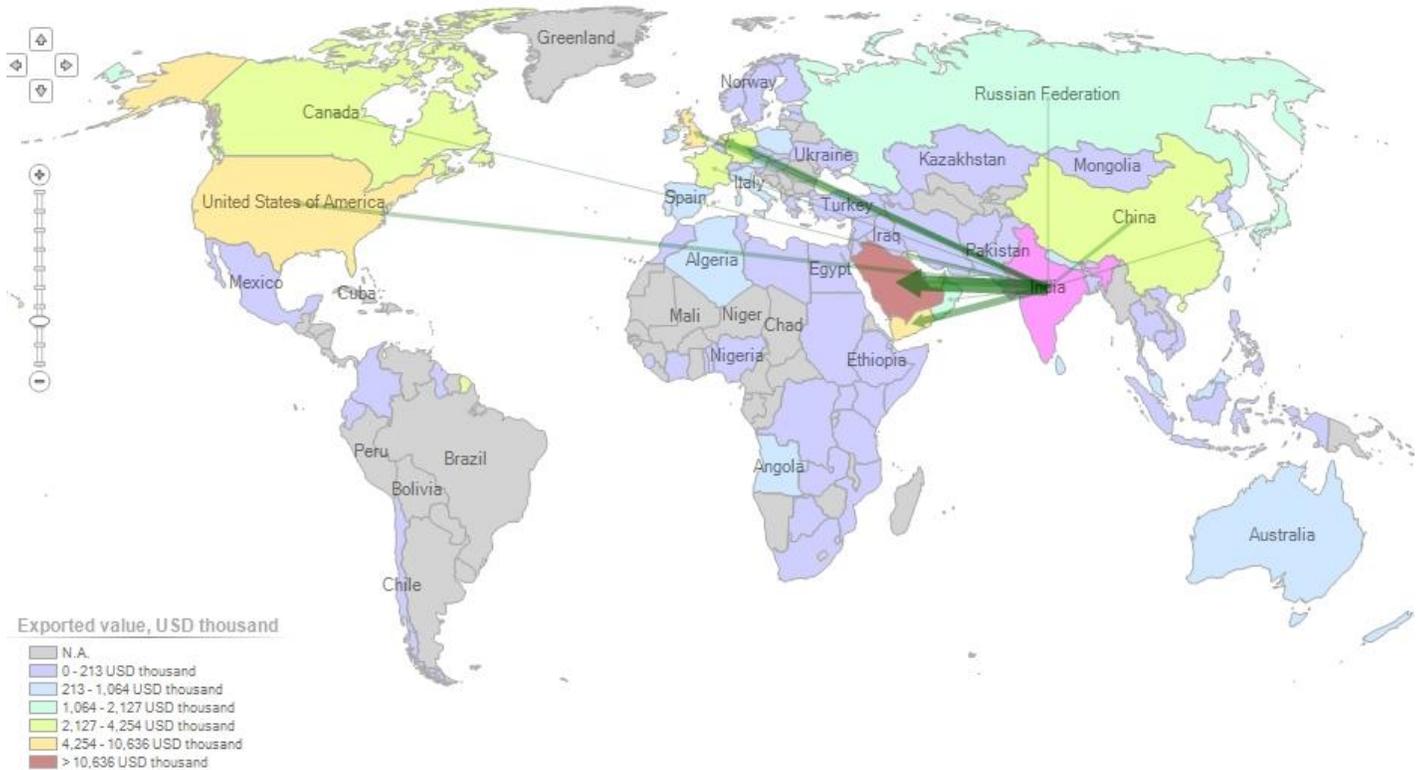
Mango pulp exports mainly cater to B2B segment ie. Beverage (juice) manufacturers, Dairy, Ice-cream, Bakery and confectionery industry.

The country's mango production has been increasing every year and is estimated to be up by 8 percent to approx. 22 million tonnes by 2018-19. Indian Mango pulp export has a comparative advantage over the other countries due to the superior quality and grade of varieties available. However, Indian Mango pulp is facing severe competition from countries in South America & Africa since the mango from these countries is relatively quite cheaper. The challenge is especially dismal this year because of a natural shortage owing to lower production of fruit. While we have been able to maintain our export volumes, we have been compelled to pay higher prices. For e.g. Current year TMP price for EU markets ranges between USD 750-850 per MT compared to last year average between USD 480-550 per MT. Such enormous variability and price inconsistency leads to loss of valuable orders and key customer retention.

Indian mango pulp is exporting globally (values in USD Mill.)



India's major export destination of Mango Pulp



Mango Pulp in India

Popular processing varieties: Alphonso, Totapuri and Kesar with Sindura and Neelam (being processed in small quantities). These varieties fetch good demand among customers in the international market.

Season: Alphonso processing begins in May every season here followed by Kesar and Totapuri in June

Alphonso Mango Pulp (AMP)



Brix: 16 Deg

Packing: 215kg Net wt. Aseptic bags in drums

Gross Wt: 18MT (80drums in one 20'FCL)

Shelf life: 18months from packing when stored in ambient conditions

Canned (golden / white lacquered cans)

Export Packing: 3.1kg. Cans Net wt., 6Nos per carton

Gross Wt: 18.60MT (1000cartons in one 20'FCL)

Shelf life: 24months from packing when stored in ambient conditions

Kesar Mango Pulp (KMP)



Brix: 16 Deg

Packing: 215kg Net wt. Aseptic bags in drums

Gross Wt: 18MT (80drums in one 20'FCL)

Shelf life: 18months from packing when stored in ambient conditions

Canned (golden / white lacquered cans)

Export Packing: 3.1kg. Cans Net wt., 6Nos per carton

Gross Wt: 18.60MT (1000cartons in one 20'FCL)

Shelf life: 24months from packing when stored in ambient conditions

Totapuri Mango Pulp (TMP) & Totapuri Mango Concentrate



Brix: 14 Deg

Packing: 215kg Net wt. Aseptic bags in drums

Loadability: 80 Drums per 20'FCL

Brix: 28 Deg

Packing: 215kg Net wt. Aseptic bags in drums

Loadability: 80 Drums per 20'FCL

Mango pulp packed in 850gm Cans (natural/sweetened) is meant for the B2C retail segment catering to supermarkets, hotels, restaurants etc.

Packing: 850gm Cans Net wt., 12Nos per carton

Gross Wt: 18MT (1750cartons in one 20'FCL)