

Mango

European market month by month in 2021

Another complicated year

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A gloomy start to the year, marked by the health measures

The year started with the traditional and always tricky overlap period between the Brazilian and Peruvian supplies. On top of that this year were the effects of the second wave of Covid-19, which to a degree froze consumption: no “impulse” purchases generally favoured after the festive period via the promotions.

At the end of January, the high shipments tempo from Peru maintained a high overall supply level, despite disruptions due to the health measures in place in the field of maritime logistics (Covid screening tests for crews). Then the recovery made itself felt bit by bit. In February, the shipments delay created a relative under-supply, enabling a slowdown in rates. The European markets coped more or less well with the staccato shipments.

Too short a surge period over Easter

In March, the European market seemed to emerge from its slumber, while the combined supply from Peru and to a lesser extent Brazil weighed heavily on sales. Indeed it underwent a profile shift in the run-up to Easter, when the more urgent demand reinvigorated transactions. The faster demand meant more fluid merchandise flows, and helped raise the sale prices. Peruvian Kent were the first to take advantage of this market shift, though this trajectory also brought bigger Brazilian shipments in its wake, with Palmer and Tommy Atkins varieties. Demand over Easter seemed dynamic, in spite of the reinforced health measures in several European Union countries.





From slowdown to collapse

April was initially characterised by declining rates, and then by the traditional transition period between the Peruvian campaign and the West African origins campaign. At the end of the month, the market was completely wobbling. Rates, which had previously held up constantly, were breaking up. The influx of merchandise from Côte d'Ivoire (steeply rising) and Brazil, as well as the last Peruvian shipments (delayed) formed a big overall supply in a context where demand was more focused on seasonal fruits. In May, it was even possible to talk about genuine destructuring. The widening varietal and quality range of the merchandise on the market was disrupting the sales conditions.

The context also saw sudden and frequent meteorological changes, which did not contribute to consumption of tropical fruits, although the lack of activity affected the whole fruits and vegetables sector. In early June, the market was reaching the trough of the wave.

A particularly heavy summer season

From mid-June, the European mango market recovered slightly, given the considerable fall in the supply. The Ivorian campaign was winding down, Mali was shipping limited quantities, and Brazilian shipments were tending to dip slightly. In late June, the supply was primarily provided by Brazil, the Dominican Republic and Senegal. In July, the summer tempo was gradually establishing itself. The holiday period and atypical weather conditions in some European countries did nothing to favour mango consumption, and more generally consumption of tropical fruits. The multiple and disparate supply did not help set steady rates. Numerous quality problems on the fruit from several origins only aggravated the difficult sales conditions. In August, the supply remained substantial and diversified, while demand was at rock bottom. The market was heavy and the pressure on sales particularly high since fruit from some origins was too fragile to be triggered, and so were sold as it was, to prevent the development of fungal attacks. Fruit sold in this way is often rejected since it does not match customer expectations.

Tiny increase after the summer holidays

During the September transition period, we observed a fall in volumes available, with the liquidation of the last batches from Senegal and the Dominican Republic. Brazil continued its shipments at an unsteady tempo, especially because of the delays in incoming shipping. Israel was at the height of its campaign, and starting to gradually decrease its shipments. We could observe a general upward trend in rates, varying between the European markets and the varieties placed. But it would not last. From the end of the month, the market swelled, with the combined merchandise available from Israel alongside the increased shipments from Brazil and Spain.

At the same period, Brazilian exports to the North American markets were increasingly steeply, and becoming predominant over the quantities aimed at the European markets. Nonetheless, the situation proved more favourable on the air-freight market, with more moderate volumes.

Covid back in the autumn

In October, the restrictions relating to the Covid epidemic in certain East European countries, including Russia – had a distinct effect on merchandise flows from the unloading ports. In November, the new wave of the pandemic spreading rapidly in some European countries led the authorities to implement restrictions on population movements. On top of these were logistical disruptions caused by shipping delays, with some abandoning stopovers in order to shorten transport times to Europe. The resurgence of the restrictions was unfavourable for consumption, with the lack of confidence in the near future also causing a wait-and-see position in trade.

There were no miracles for the end-of-year festivities. While the run-up to the holidays stimulated demand a bit, the market remained heavy due to the large shipments from Brazil, although they were still subject to logistical delays. On top of the substantial Brazilian shipments there were shipments from Peru, which started its campaign early. The European mango market finished the year on a sluggish note. The large quantities available and lack of consumer interest during the end-of-year festivities deconstructed the market conditions ■