

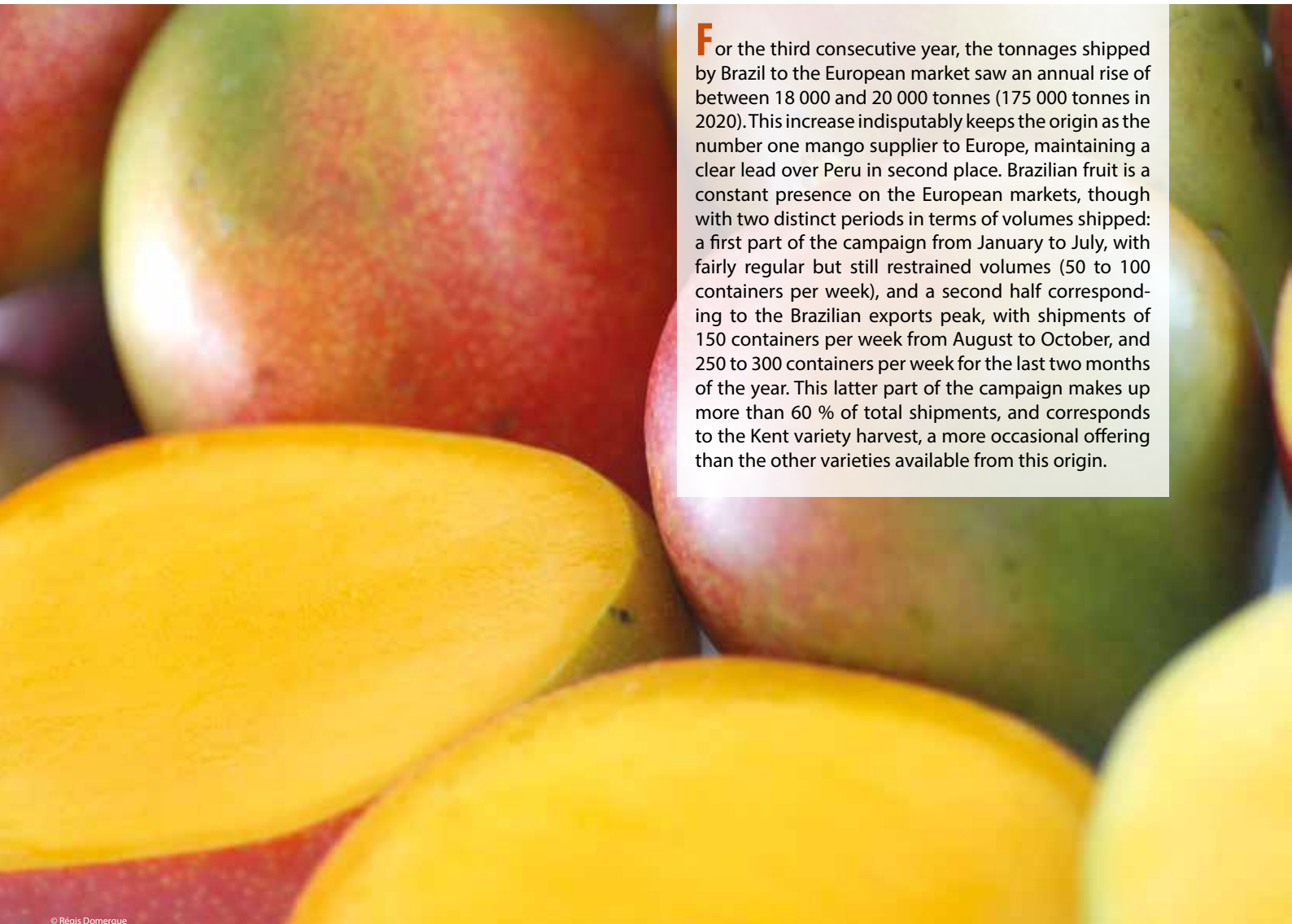
# Mango

## 2020 review by origin

by **Pierre Gerbaud**, consultant  
pierregerbaud@hotmail.com

### Brazil

#### Inexorable expansion



**F**or the third consecutive year, the tonnages shipped by Brazil to the European market saw an annual rise of between 18 000 and 20 000 tonnes (175 000 tonnes in 2020). This increase indisputably keeps the origin as the number one mango supplier to Europe, maintaining a clear lead over Peru in second place. Brazilian fruit is a constant presence on the European markets, though with two distinct periods in terms of volumes shipped: a first part of the campaign from January to July, with fairly regular but still restrained volumes (50 to 100 containers per week), and a second half corresponding to the Brazilian exports peak, with shipments of 150 containers per week from August to October, and 250 to 300 containers per week for the last two months of the year. This latter part of the campaign makes up more than 60 % of total shipments, and corresponds to the Kent variety harvest, a more occasional offering than the other varieties available from this origin.



## Varietal shift confirmed

Long based solely on Tommy Atkins, Brazilian exports have undergone a considerable transformation over the past ten years. The most radical change has doubtless been the distinct drop by this variety in the range provided by the origin. Whereas it represented 75 % of shipments in 2010, it now accounts for just 20 to 30 % a decade later. This productive variety, bearing fruit which is frequently coloured, resistant to transport and certain diseases, is being abandoned especially because of its fibrous flesh and lack of flavour. However, it does provide a continual base for Brazilian exports year round, due to the size of the cultivation area but also cropping practices enabling production programming which is more difficult to achieve with other varieties.

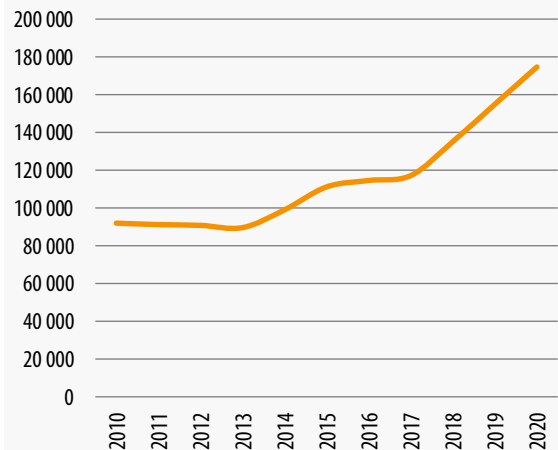
This decline of Tommy Atkins has been simultaneously offset by the rise of Palmer. This variety, also productive, bears coloured fruit with non-fibrous flesh and good taste quality. Practically absent from the varietal range ten years ago, it now makes up 30 to 35 % of flows aimed at the European Union, thereby hoisting itself up to be the number one export variety in terms of volumes. Like Tommy Atkins, it is available year round.

The second variety developed by the Brazilian industry for export is Keitt, growth of which has been less dazzling than for Palmer, but which accounts for 20 to 25 % of export volumes, as opposed to 10 to 15 % in the 2010s.

Finally, Kent, whose campaign, enriched by other varieties from Brazil, represents the high point of the annual supply, accounts for on average just 15 to 18 % of quantities shipped to Europe. It is restricted to what is still a marked seasonal tempo by greater programming difficulties, while its low productivity limits and concentrates its availability. In spite of everything, it remains the ambassador for Brazilian exports, since it remains the most popular variety on the European markets.

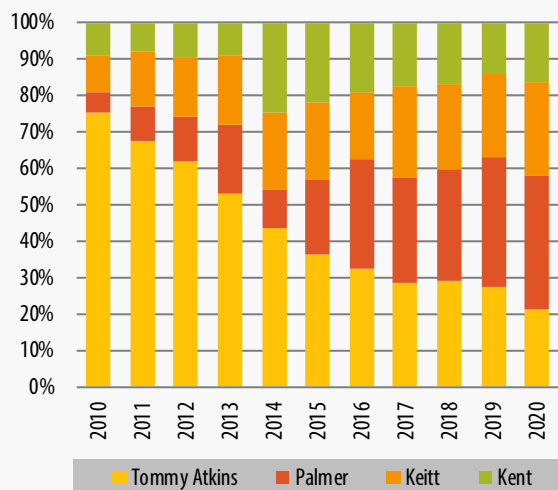
### Brazilian mango - European Union - Imports

(in tonnes | source: Pierre Gerbaud)



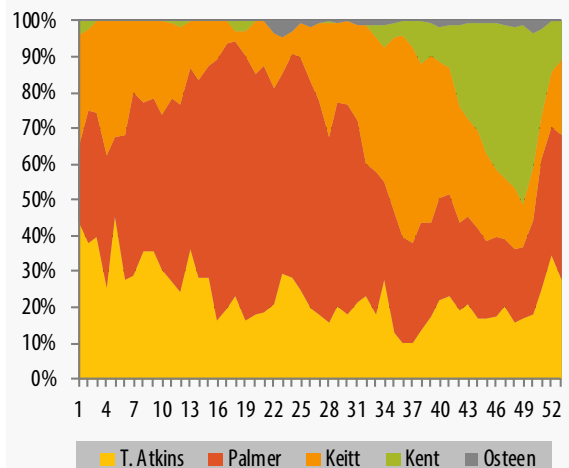
### Mango - Brazil - Evolution of export volumes by variety

(sources: Brazil, Pierre Gerbaud)



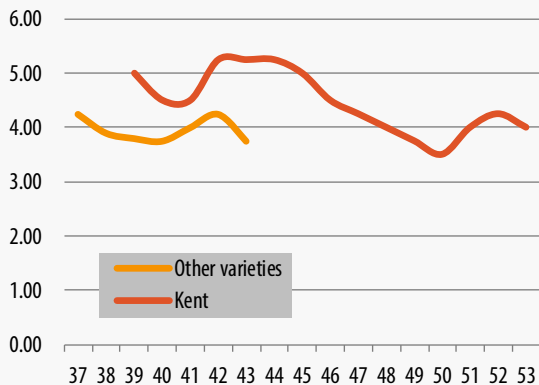
### Mango - Brazil - Varietal breakdown of weekly export volumes to Europe in 2020

(sources: Brazil, Pierre Gerbaud)



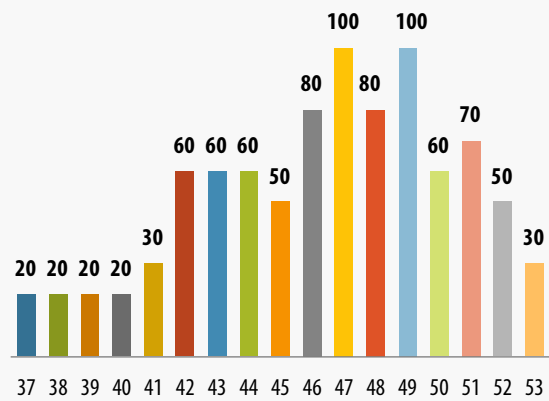
### Brazilian air-freight mango - Weekly average import price on the French market in 2020

(in €/kg | source: Pierre Gerbaud)



### Brazilian air-freight mango - Weekly incoming shipments on the French market in 2020

(in tonnes | source: Pierre Gerbaud)



## A late air-freight campaign

As in 2019, the first air-freight shipments were placed on the market in week 37 (early September). They comprised Keitt, which sold at around €4.00/kg. Two weeks later, the first Kent shipments began. With a scarcity of this variety, the market offered good conditions, with sale prices often above €5.00/kg in October. Brazilian shipments remained restrained, though the limited demand and qualitative variations of the Brazilian fruit sent prices on a gradual and long-term fall. In November, Brazilian mangos were trading on a footing of €4.00/kg. In December, the market became more mixed, with the start of the Peruvian campaign and the progress made by its shipments. Brazilian mangos saw their prices drop back down to €3.50/kg by mid-December. The invigoration of consumption by the end-of-year festivities enabled prices to partially recover (€4.00-4.25/kg), while the origin was nearing the end of its season. The last batches from Brazil received in the first half of January obtained prices on a downward footing, faced with the surging Peruvian supply.



## A mixed sea-freight campaign

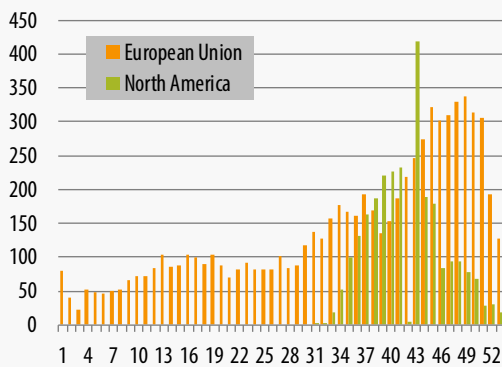
Generally, the beginning of the year is never very favourable for mangos from Brazil or elsewhere. Brazil is nearing the end of its winter campaign, mainly focused on the Kent variety. From December Peruvian shipments are on the rise; this origin enters the market with massive quantities in January. This transition between Brazil and Peru is often a tough time for the former, which is subjected to a Peruvian wave which drives down prices.

This situation continues throughout Q1, when Peru largely dominates the mango supply to the European market. During the European spring, Brazil steps up its shipments upon the transition from the Peruvian campaign to the West African campaign. The handover between these campaigns is characterised by a fall in the Peruvian supply level and a late start by South Africa, leaving a trade window for Brazil, which represents an alternative to the more or less marked breaks in the supply. This period also provides a pick-up in consumption for the Easter holidays, with promotion programmes in the supermarket sector. In the less common scenario of a prolonged Peruvian campaign, Brazilian shipments represent an overload on the market, favouring price decreases. This was the case in 2019.

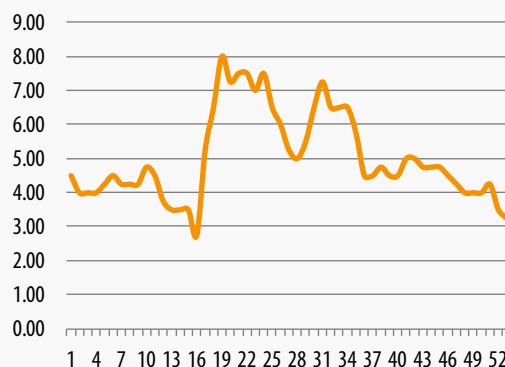
In 2020, the spring and summer period was rather favourable for Brazilian mangos. This origin indeed made up for the drop by the secondary origins, which are nonetheless important in the European supply calendar: West Africa (- 10 000 t), Israel (- 3 700 t), the Dominican Republic (- 1 600 t) and Senegal (- 4 000 t). In total, these nearly 20 000 tonnes correspond to the increase in Brazilian exports to Europe. From April to September, the price of Brazilian mangos maintained a level above €5.00/box, at times reaching over €7.00/box. The situation deteriorated in the autumn with the start of the Kent campaign. The less marked demand and above all disparate quality of Brazilian fruit from October to mid-November brought prices back to around €5.00/box. In late November and December, prices continued to fall, before stabilising at around €4.00/box, because of the supply progressing while demand remained stable, and the first batches arriving from Peru.

Hence Brazil experienced the best moments of its 2020 campaign when it was offsetting the defection of other origins, once again showing its responsiveness, with the support of a well-developed production sector. Furthermore, volumes shipped by this origin remained measured during these periods. Conversely, the end of the year proved more complicated, with a large and concentrated supply facing a fairly quiet market ■

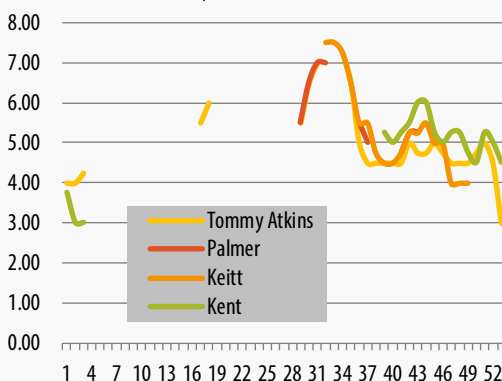
**Sea-freight Brazilian mango - Weekly incoming shipments in 2020 in the EU and in North America**  
(in number of 40-ft containers | source: Pierre Gerbaud)



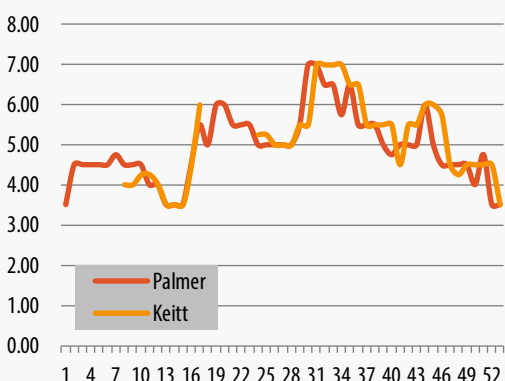
**Sea-freight Brazilian Tommy Atkins mango Weekly average import price in 2020 in the Netherlands**  
(in €/box | source: Pierre Gerbaud)



**Sea-freight Brazilian mango - France - Weekly average import price in 2020 for various varieties**  
(in €/box | source: Pierre Gerbaud)



**Sea-freight Brazilian mango - Netherlands - Weekly average import price in 2020 for various varieties**  
(in €/box | source: Pierre Gerbaud)



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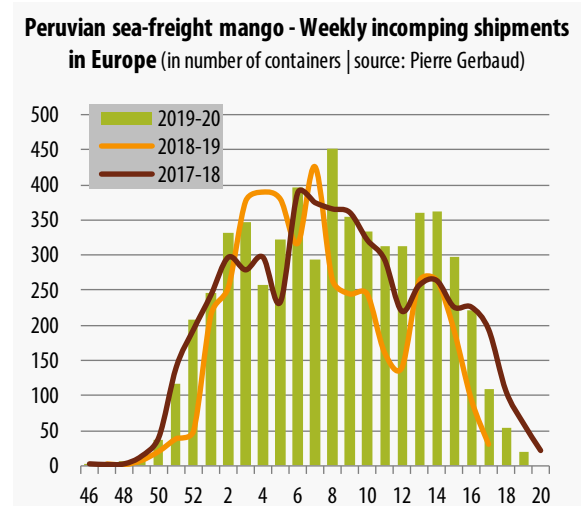
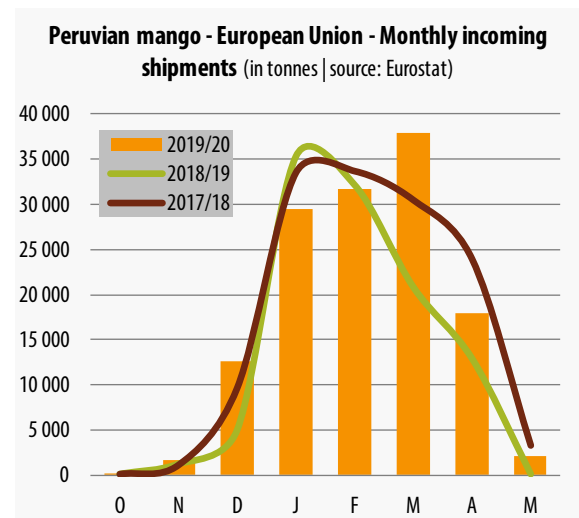
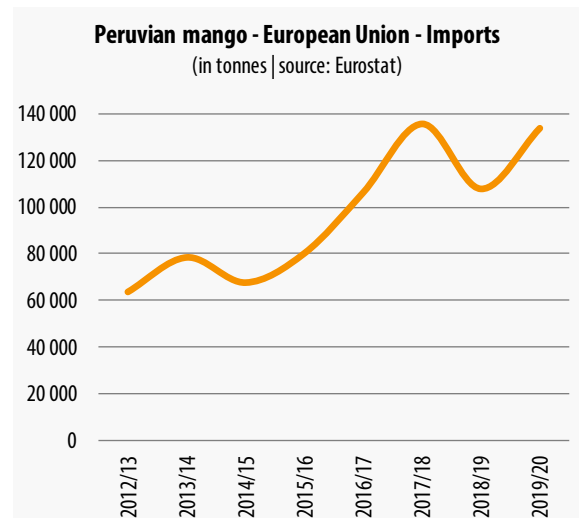
# Peru

## Climbing ever higher!

The 2019-20 campaign marked a new step in Peru's development of its mango exports to the European markets. With exports of nearly 125 000 tonnes between October 2019 and May 2020, Peru regained its relentless expansion on the international mango market, which had reached its zenith during the 2017-18 campaign (135 500 tonnes). The 2018-19 season had marked a downturn of nearly 28 000 tonnes, because of less favourable weather conditions combined with the alternate bearing phenomenon. The entry into production of new orchards did not offset this shortfall. In 2019-20, Peru came back strongly on the European markets, and regained practically all the volumes lost between the 2017-18 and 2018-19 campaigns.



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## A steadier sea-freight campaign

The 2019-20 Peruvian export campaign began in mid-November with unrepresentative volumes, which were received when Brazilian fruit was really dominating the market. They sold on the same price footing as Brazilian fruit, with a slight markdown, as the Peruvian supply primarily comprised small sizes less sought after by the distributors. Despite Brazil's withdrawal in terms of the Kent variety at the beginning of 2020, Peruvian mango rates dipped by practically €1.00/box from the start of the campaign. This fall steepened in January, before prices stabilised at around €4.00/box on average for medium-sized fruit. Small sizes, which dominated the incoming shipments, earned only €2.50 to €3.50/box. The magnitude of the volumes received (300 to 350 boxes/week), in a context of depressed demand after the end-of-year festivities, weighed down heavily on sales of the merchandise.

In February, although incoming shipments were still large, sale prices strengthened slightly, returning to around €4.50/box. This improvement can doubtless be attributed to the better sizing balance of the Peruvian supply. The height of the European counter-season was another factor reinvigorating demand.

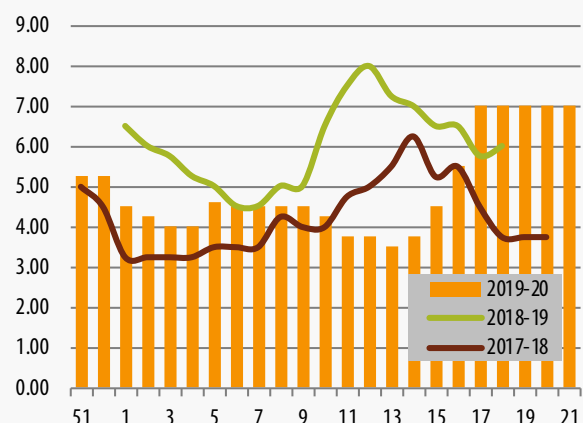
In March, the disruptions due to the Covid-19 pandemic and the lockdown measures arising from it plunged the market back into a difficult period. Over the first two weeks of lockdown, mango consumption dropped, with consumers preferring to switch to staple products. Thereafter, distributors expanded their range of fruits once more, and in the mango found an opportunity for diversification at decent prices. The still substantial supply from Peru drove prices downward to their lowest level of the campaign, below €4.00/box on average.



In late March-early April, the situation turned around rapidly, with consumption making an unexpected recovery, accelerating in the run-up to the Easter holidays, which even during lockdown saw consumers fall back into their more traditional purchasing behaviours. Peruvian mango rates literally soared, while shipments maintained a particularly high level in the first half of April. In the second half of the month, the rapid decline in Peruvian shipments maintained the price rises, which reached a stable level of €7.00/box until the end of the campaign. In the space of three weeks, the rate went from its rock-bottom level of the campaign to its highest level, with more than a twofold rise. The change in prices from March to April 2020 exhibited the exact opposite of the profile from the same time the previous year, when the breakdown in tonnages and their intensity were different. Traditionally, Peruvian volumes peak in January/February, a time when prices are at their lowest. They tend to rise in March/April when shipments dip. In 2020, incoming Peruvian shipments maintained a high level throughout the campaign (more than 300 boxes/week), with a marked peak in late March/early April. These intensified shipments, right at the peak of the health emergency, caused a drop in prices. There was a bounce-back in consumption after the trade had adapted to the restrictive measures, which made for a distinctly better end of the campaign.

In the end, the extension of the Peruvian campaign, with larger volumes in April than in previous years, initially bore the full brunt of the effects of the health crisis. But it also took advantage of it at the end of the period, due to the recovery in consumption due to the lockdown. On the other hand, Peru filled the relative supply trough during the transition between its campaign and the West African campaign. An earlier start by Côte d'Ivoire would probably have kept the market in a tougher spot. The quantitative growth in Peruvian exports did not lead to better economic results, but only to predominance on the market.

Peruvian sea-freight mango - Weekly average import price on the French market (in €/box | source: Pierre Gerbaud)

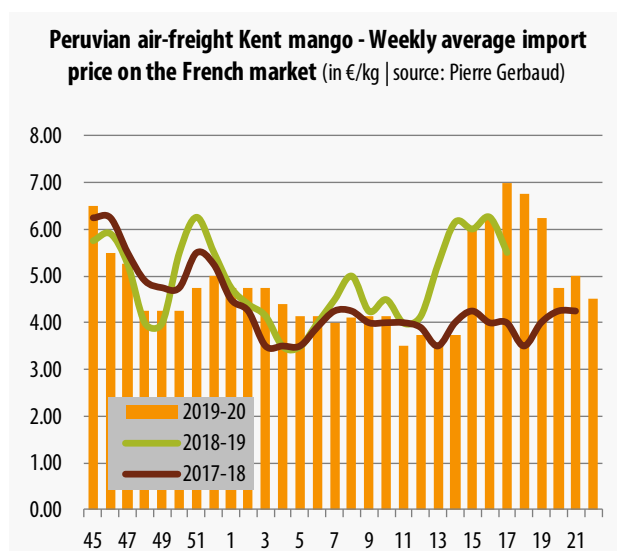


## An extended air-freight campaign

The profile of the Peruvian air-freight campaign was similar to that of the sea-freight campaign, with rates rapidly falling from the start in the face of the Brazilian competition, stagnating in December before partially recovering in January due to the halt of the Brazilian Kent campaign. Sale prices then gradually dropped in February, and sank in March when lockdown was implemented. In the second half of March, air-freight mango sales suffered a particularly heavy slowdown, resulting in prices of around €3.50/kg, below cost price for the merchandise. In early April, rates soared to €6.00-€7.00/kg during the Easter holidays. These high prices held up until week 17. They then dipped for the last batches of the campaign down to €4.50/kg, given the increasingly fragile quality in the face of the first Ivorian shipments, which kept better.

The air-freight campaign this year was marked by highly versatile sale prices from one week to another, especially during lockdown periods, when stop-start shipments generated uncertainty. The readability of the market was blurred according to the dramatically reduced capacities to transport the merchandise. Incoming batches traded at high prices for the good sizes, but rapidly deteriorated, especially at the end of the campaign when the fruit quality became more fragile. This price yo-yoing made marketing more complicated, especially since freight rates, and therefore the cost price of the merchandise, were on the increase. In spite of the transport constraints during the last two months of the campaign, Peru managed to ship approximately 14 600 tonnes of fruit by air, i.e. approximately 10 % of its total exports to the European markets.

Whether by sea-freight or air-freight, Peru remains one of the mainstays of the mango supply to the European market, alongside Brazil. Its production and export capacities are not limited to Europe, since it also ships 79 000 tonnes to North America (2019-20), slotting in alongside Mexico, Ecuador and Brazil. Peru exported a total of around 214 600 tonnes to these two main markets. On top of this figure we should add its shipments to other countries (e.g. Japan), though the quantities are smaller ■



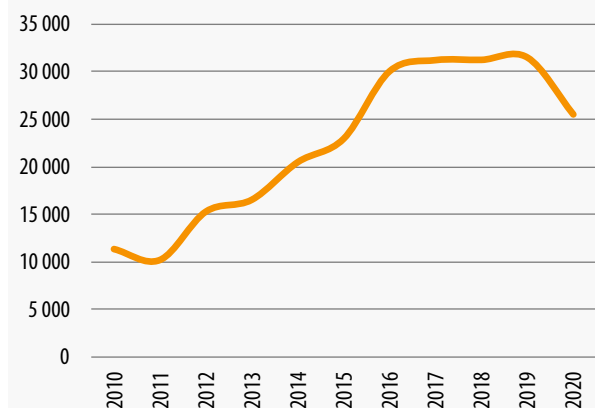


# West Africa

## Standing in the midst of the storm

**D**espite their exports to Europe taking a downturn of nearly 10 000 tonnes in 2020 from the previous season, the West African origins (Côte d'Ivoire, Mali, Burkina Faso and Guinea) held up against the competition and the health crisis. In fact their campaigns coincided with the first wave of the Covid-19 pandemic. The emergency adaptation to the protective measures imposed by the authorities of these countries imposed new constraints on operators in the West African mango industry, on top of the pre-existing ones already mentioned in FruiTrop (no.268 in March 2020). Under these particular and exceptional circumstances, the export campaign nonetheless went ahead as lockdown measures spread across Europe, providing little opportunity to read the reaction of the recipient markets. Sales of West African mangos ultimately seem to have gone well, and the loss of volumes was doubtless offset by better economic results. Maybe this is something for the professionals to think about?

**Côte d'Ivoire mango - European Union - Imports**  
(in tonnes | source: Pierre Gerbaud)



## Côte d'Ivoire

### A quantitative downturn, but better valuation

Côte d'Ivoire was set for a complex mango export campaign in 2020 due to the progress of the Covid-19 pandemic, and its consequences on the merchandise flow. The lockdown measures taken by both European and African states blurred the supply conditions and the market prospects. For the supply, Ivorian exporters had to quickly adapt to social distancing rules, with the economic capital in go-slow mode. Traffic restrictions in the country's northern production zones reduced the supply rate to the packing stations. The reduced working hours and the number of employees at the stations inevitably had consequences on volumes shipped. As for Europe, the uncertainty over sales also represented a brake on import flows, with scaled-back or cancelled fruit supply programmes. With exports of approximately 25 500 tonnes, the 2020 campaign marked a 20 % drop from previous years. This major West African origin made considerable progress in terms of mango exports in 2016. Indeed they rose to around 30 000 tonnes until 2019, with variable economic results. The 2020 campaign went differently, and more positively than the backdrop of the health crisis would have led us to expect.

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## A compact but lively sea-freight campaign

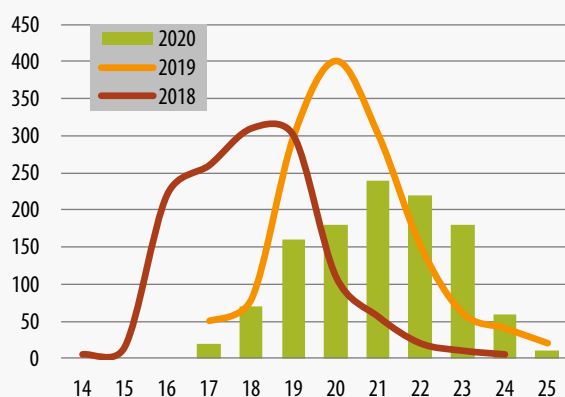
The Ivorian campaign frequently begins too late to enjoy good market conditions over the Easter holidays, when demand is generally vigorous. The fruit reaches physiological maturity for the export market later. The official opening of the mango harvest by the Ivorian authorities this year was set for 12 April, leading to the produce entering the European market at the end of April. The fruit harvesting and packing times, as well as the transport times, could hardly allow earlier market entry. In a sense, this configuration proved favourable, since it made the supply to the European market scarcer, and therefore provided an opportunity for better sale prices. The fairly rapid withdrawal of Peruvian mangos left the market in a situation of under-supply, all the more marked since demand remained high and seasonal fruit availability remained very moderate.

Hence the first Ivorian batches available in the last week of April sold on the same price footing as the last of the Peruvian batches. The Ivorian supply made rapid progress, reaching its peak in the second half of May, when most export companies were winding down their campaigns. The more abundantly supplied market and less urgent demand led to a gradual drop in prices, though they remained high and well above the previous season's level. In the first half of the campaign, their average rate registered a price differential from 2019 of plus €1.00 to €1.50/box, and plus €2.00 to €2.50/box in the second part of the campaign. At the end of the period, price ranges widened given the more haphazard fruit quality (heterogeneous batch maturity, fungal attacks, etc.). The general trajectory of the market was also less favourable due to the proliferation of supply sources and the increasingly marked consumption switch toward seasonal products. In mid-June, this campaign wound down with the sale of the last Ivorian batches; contrary to all expectations, it was one of the best in recent years.

The particular context of this year, with the lockdown measures due to the first wave of the Covid-19 pandemic, was rather favourable for mango marketing. After the second half of March, a period which marked a nearly complete halt to mango consumption, this fruit won back market share primarily through the supermarket sector, with the catering sector and open-air markets having been closed. The rapid fall in Peruvian shipments from April was also an asset for the Ivorian campaign, as was the decrease in shipments of approximately 5 000 tonnes. The combination of these favourable factors – if they were behind the smoothness of the campaign – should be food for thought for the Ivorian industry, in particular in terms of better adapting export volumes to the market's absorption capacities. Overloading would appear pointless, particularly in the context of a short and condensed season.

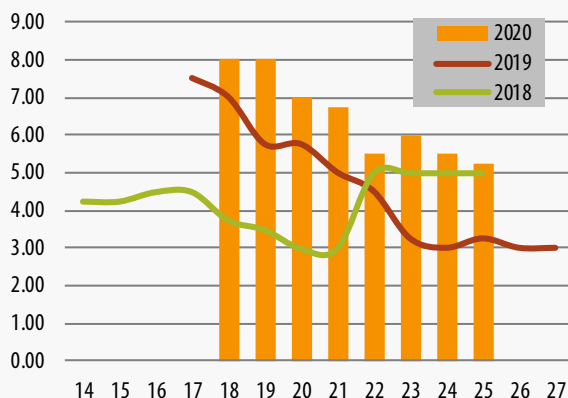
**Côte d'Ivoire sea-freight mango - France**  
**Weekly incoming shipments**

(in number of containers | source: Pierre Gerbaud)



**Côte d'Ivoire sea-freight Kent mango - France**  
**Weekly average import price**

(in €/box | source: Pierre Gerbaud)



## Air-freight campaign governed by transport

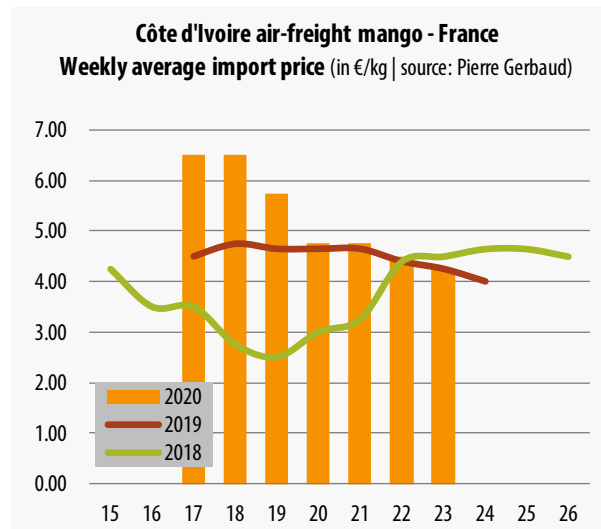
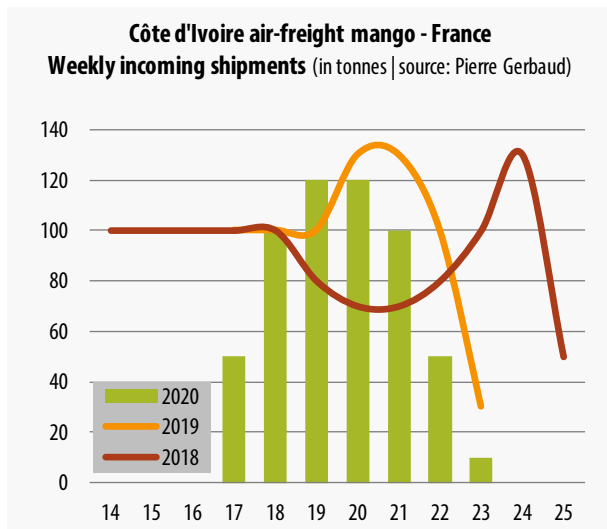
While the Covid-19 pandemic ultimately had fairly little effect on sea-freight flows, it heavily disrupted air-freight supplies. When the Ivorian export campaign started in the second half of April, the lockdown measures in Europe were being strictly implemented. The closure of many countries' borders and the resulting reduction in travel paralysed a large proportion of air traffic. Most passenger flights were cancelled or minimised, and reserved for repatriation purposes. Logically, air-freight export capacities were scaled back, resulting in a loss of the supply regularity that characterises this mode of transport. To offset this logistical bottleneck, professionals resorted to cargo freight. Yet the fleets of airlines serving West Africa proved insufficient to transport merchandise aimed at the European markets. Hence operators also employed charter/cargo flights to ensure the air-freight mango supply to the European markets.

While this solution did feed the markets, there were some drawbacks. The first was the soaring freight rates, which were automatically passed onto fruit sale prices. Then there were the consequences of chartering on the import tempo, and the jerkiness it caused on the markets. At the beginning of the campaign, this aspect did not make itself felt, insofar as the air-freight fruit supply was particularly small, with a considerable fall in Peruvian shipments at the end of the country's campaign. With a small market supply, Ivorian air-freight mango prices approached those of Peruvian mangos. Yet after two weeks on the market, prices dipped distinctly, from more than €6.00/kg on average to €5.00/kg, an apparently satisfactory price in a normal context, though less lucrative due to increased freight rates. In mid-May, Ivorian air-freight Kent rates settled back into their trajectory from the previous campaign, not affected by the pandemic context. Exports wound down from the end of May, with average prices of €4.25/kg.



As decent as they were, these average prices conceal large variations in the transactions. The stop-start supply resulted in high sale prices for high-quality incoming batches, though with considerable depreciation at the tail end of batches, often of advanced maturity after some time in storage. After a favourable start, the second part of the campaign proved to be less brilliant. The extremely high fruit retail prices gradually put off a section of consumers, especially since from mid-May the lockdown easing process began. With the reopening of stores, consumption expanded to a greater variety of goods, having been highly focused on food products during the lockdown. The lack of consumer interest in tropical products was also aggravated by the parallel progress of the seasonal fruits supply.

Despite particularly tough conditions and the difficulty getting a read on the market trajectories, Ivorian operators managed to consolidate their trade niche on the European market. Atypical situations sometimes generate positive factors. And the economic results of the 2020 campaign seem satisfactory and positive. We can note that the health constraints of the international situation did not wipe out the industry's export capacities. It certainly did force operators to show great adaptability, and forced volumes downward. In view of the results obtained, was this quantitative downturn not actually advantageous? ■



# Mali

## A campaign of perseverance

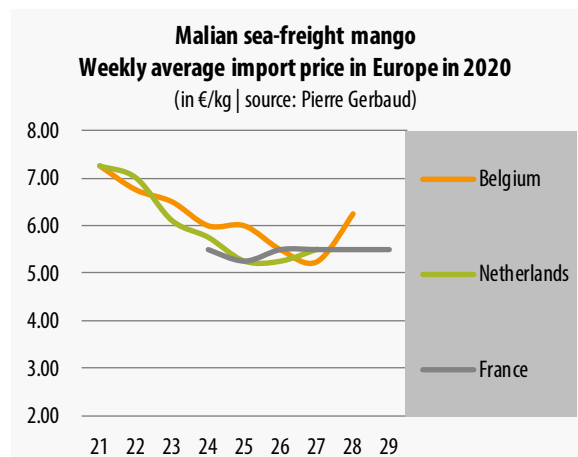
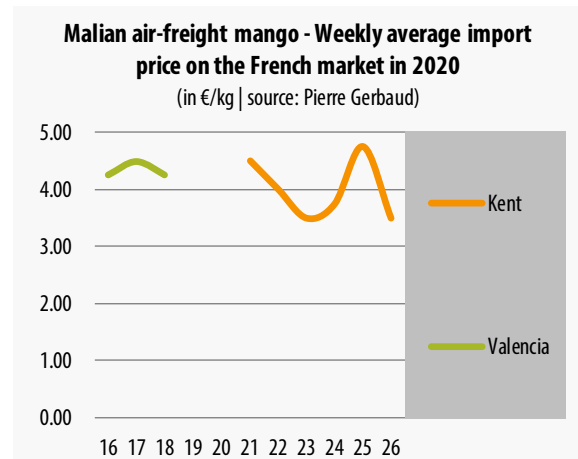
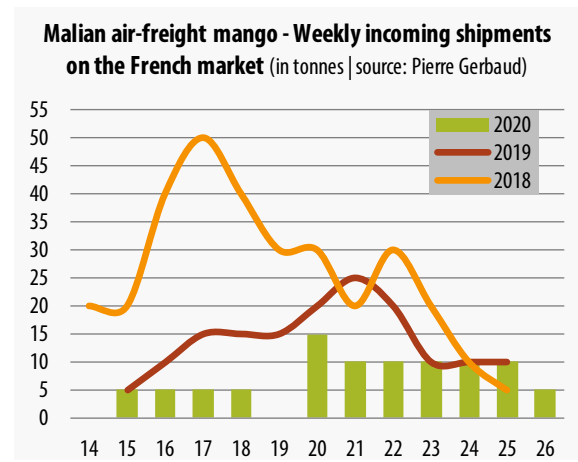
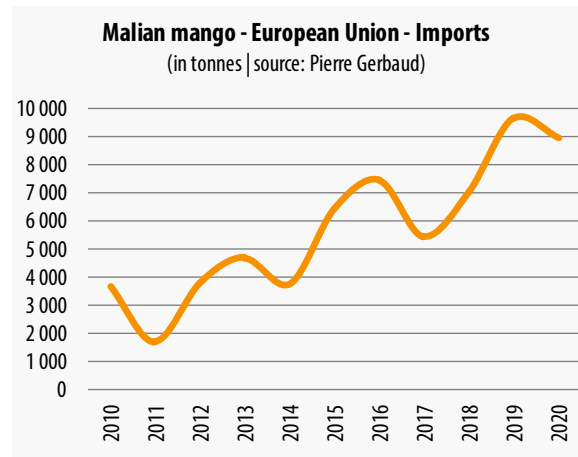
True, the rise in mango volumes shipped by Malian operators to Europe came to a halt in 2020. However all in all the downturn was limited (700 tonnes), with the origin remaining in place (8 960 tonnes, as opposed to 9 660 tonnes in 2019). Over the last decade, this landlocked country tormented by a fragile geopolitical situation has managed to more than double its mango exports to European markets. These sales are being topped up, like its neighbour Burkina Faso, by shipments on the regional market and progress in processing, especially in the dried fruits sector.

## A two-part air-freight campaign

As for the other West African countries, air-freight exports this year were governed by air freight availability, and limited by the impacts of the worldwide health crisis. However, operators were able to ship some volumes from early April, with Valencia selling steadily at around €4.50/kg for approximately four weeks. After a brief hiatus in late April/early May, shipments resumed with Kent, which traded on the same price footing, but quickly became exposed to fierce competition from Ivorian and then Mexican fruit. With Ivorian shipments on the wane in late May/early June, Malian mangos regained more favourable market conditions. They also represented an alternative to Mexican fruit, often available at higher prices.

## A steady sea-freight campaign

Sea-freight mangos started trading in mid-May, with the campaign continuing until mid-July. Hence they avoided the shipments peak from Côte d'Ivoire, thereby limiting massive frontal competition. From mid-May to mid-June, Malian fruit was aimed mainly at North European markets: Belgium and the Netherlands, and their re-shipment markets (Germany, Eastern Europe and Scandinavia). Feeding these multiple markets helped the sales fluidity, and kept prices higher overall than those registered the previous season. Malian mango rates nonetheless dropped until mid-June due to the increasing supply and the weight of the merchandise from Côte d'Ivoire still available on the European market. From mid-June to mid-July, the rate stabilised at around €5.50/box. The French market opened up to Malian fruit, which bit by bit replaced Ivorian produce, whose campaign was winding down earlier. Malian produce also benefitted from the later arrival of the first batches from Senegal, especially since the overall supply to the European market comprised more Keitt than Kent, since Keitt is less popular among consumers. With a slight quantitative downturn, Mali recorded a fairly smooth campaign, and maintained its position among the West African suppliers behind Côte d'Ivoire, without access to the latter's logistical advantages ■



# Burkina Faso

## Relative stability in the crisis

With nearly 5 300 tonnes of mangos exported to the European market in 2020, Burkina Faso registered a quantitative downturn of less than 350 tonnes on the previous campaign. As for Côte d'Ivoire and Mali, the Burkinese export campaign coincided with the lockdown period. It has to be recognised that the Covid crisis had little effect on the Burkinese campaign, at least in terms of volumes. Of the origin's total exports, air-freight shipments can be estimated at approximately 300 tonnes, with the rest shipped by sea-freight. A few tonnes also seem to have been transported by road-freight, though these remain marginal and unrepresentative.

The Burkinese mango industry is continuing its commercial diversification based on three mainstays: intercontinental exports, supplying the regional markets and finally the processing sector. Hence on the fresh market, on top of the 5 300 tonnes shipped to Europe, we should add approximately 7 500 tonnes aimed at the regional markets (Ghana, Niger and Côte d'Ivoire). As for the domestic market, it would seem to have taken in 3 800 tonnes, not counting volumes involved in informal trading. The processing sector logically accounted for much larger quantities (of fresh fruit), providing decent value for the country's production as a whole. Its share can be estimated at around 85 000 tonnes of fresh fruit for processing into purée and fruit juices, but also into dried fruit. Sales of dried mangos are reported at around 2 150 tonnes of finished product, nearly all of which was exported to Europe (96 %), with the remainder distributed on the regional and local markets. Volumes of fresh fruit involved in intercontinental trade remain limited, although they are far from negligible, given the economic returns that they generate. Yet the Burkinese mango industry cannot focus too heavily on this sector. The value earned from processed products, and more particularly dried mango, has an equivalent turnover to the entire fresh fruit trade.

The Burkinese air-freight campaign began in the second half of March, when the lockdown measures were taking effect in several European countries. Freight capacities were considerably reduced at this time, due to the cancellation of the majority of flights by airlines serving the country. The division of the merchandise between the various European countries and their irregular shipments made it impossible to track sales accurately. Some Amélie imports in mid-April onto the French market illustrated the good sales conditions, with prices in excess of €4.00/kg. These prices were particularly high for this variety, corresponding to a dwindling supply at this time. This irregular flow rapidly wound down in favour of Kent and Valencia, which then sold at high prices too, although on a downward footing from early May. During May, Ethiopian Airlines provided an occasional service to Bobo-Dioulasso Airport, with four flights to transport mangos to the international markets.

Sea-freight shipments were distributed to the usual markets, though it was impossible to record sale prices regularly. These shipments were 70 % packed into May and June. April marked the start of the campaign, which wound down in July, with distinctly smaller tonnages. We will be able to refer to the graph of prices recorded for Malian mangos shipped at the same time, which should be fairly similar for Burkinese fruit.

As for all origins whose campaign began in March or April, the disruptions generated by the health crisis hindered shipment organisation. First of all, in the exporter countries, which had to adapt to the social distancing measures and curfews adopted by the governments. And then in the logistical aspects, and more particularly in the air-freight sector, heavily handicapped by border closures. Finally, on the recipient markets, where lockdown measures often caused a considerable drop in store footfall. Under these specific conditions, we can nonetheless observe that countries such as Burkina Faso maintained their place on the international mango market ■

Sources: Pierre Gerbaud and APEMAB



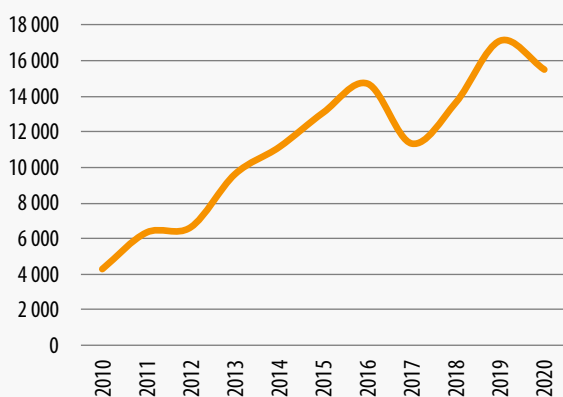
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# Dominican Republic

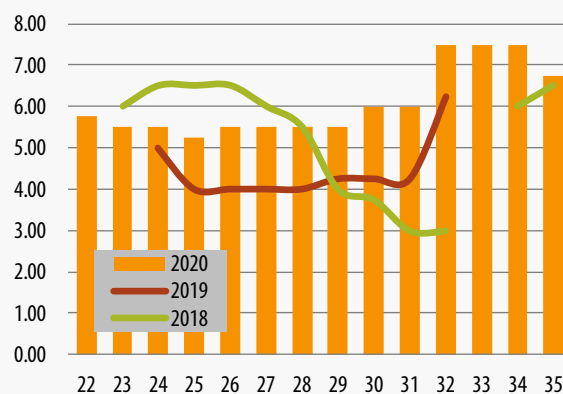
## An extended campaign

**D**ominican mango exports amounted to 15 500 tonnes from May to early September 2020, stepping up the origin's presence on European markets. In 2019, it exported more than 17 000 tonnes – a quantitative record to Europe – during a more condensed period from June to August. While volumes shipped were distinctly bigger than the previous year (13 700 t in 2018), sales proved particularly difficult from the start because of qualitative problems. Furthermore, the difficult general market conditions also generally hindered the campaign.

**Dominican mango - European Union - Imports**  
(in tonnes | source: Pierre Gerbaud)



**Dominican Republic mango**  
**Weekly average import price in France**  
(in €/box | source: Pierre Gerbaud)



The 2020 campaign seems to have enjoyed more favourable conditions. The first shipments were received in Europe in early June, i.e. two weeks before the previous season. At this time the mango market saw a downward shift because of the progress made by seasonal fruits, and a more heterogeneous mango supply in terms of origin, variety and quality. Nonetheless, sale prices stabilised at between €5.50 and €6.00/box, which though down on the €7.00-€8.00/box charged the previous month, were high nonetheless. In July, the overall supply dwindled and balanced against demand, itself on the slide. This market balance, or even slight under-supply, benefitted Dominican produce, whose sales prices strengthened and rose, even in the second half of the month. However, this good price trend was partly wiped out by the development of quality problems. Hence it was good-quality, well-preserved mangos which enjoyed the price increase, while fruit of more fragile quality sold at lower prices. In August, the situation improved further due to the reduction in the overall supply. The effective end of the Malian campaign and the temporary suspension of Senegalese shipments came at the same time as the winding-down of the Dominican campaign, still partially offset by the surges from Israel and Brazil. Hence the Dominican campaign had a decent ending for high-quality fruit, with prices exceeding the €7.00/box threshold. The staggering and scaling back of exports doubtless enabled Dominican operators to achieve a better campaign in the changeable supply context at this time of year ■



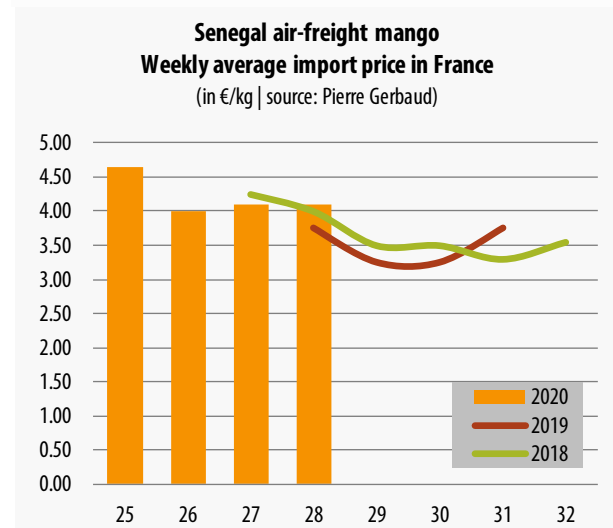
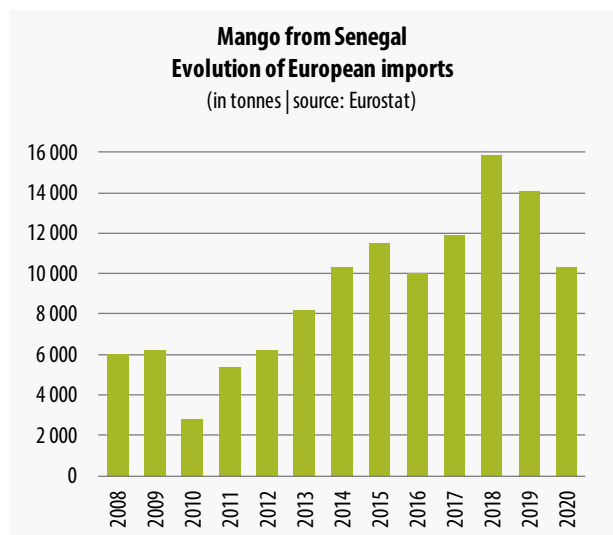
# Senegal

## A bizarre season!

**F**or the past few years, Senegalese exports to Europe maintained an upward curve. Following this exponential growth, for the second consecutive year there was a clear fall in tempo, sliding back to the export levels of 2014 or 2016. This origin, later than the West African countries (Côte d'Ivoire, Mali, Burkina Faso), is positioned in the European summer period, which is certainly not the most dynamic in terms of demand. The summer holidays scatter consumption according to flows of holidaymakers, and are also characterised by the peak consumption of European production. However, mango consumption does not stop in summer, and Senegal has a trading window between the end of the West African campaigns and the later Israeli campaign. It is one of the only origins, at this time of year, able to provide Kent. Competition from the Dominican Republic and Puerto Rico, present simultaneously on the market, primarily comprise Keitt. For 2020, Senegalese export forecasts already appear to be down on the good years. Less favourable weather conditions during fruit bearing in the orchards, as well as a perhaps more marked alternate bearing phenomenon, were reported before the start of the campaign. The predicted shortfall was 20 % to 30 %.



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## A rapid and early air-freight campaign

While the last two campaigns (2018 and 2019) were fairly late and concentrated on July, the 2020 export calendar was completely different. Like the 2017 campaign, air-freight exports from Senegal were distinctly earlier. They progressed from mid-June, spilling over into the first half of July. Given the air-freight shipping difficulties due to the lack of freight capacity, the competition from Mexican produce already available and more fragile fruit quality, the flows came to rapid halt. After being marketed at around €4.50/kg, Senegalese mango rates stabilised at around €4.00/kg. This did not ensure sufficient profitability given the increase in freight and transit prices. The limits on air-freight shipments contributed to a dip in overall volumes shipped, but to a moderate degree. Senegal's export focus was instead on sea logistics.





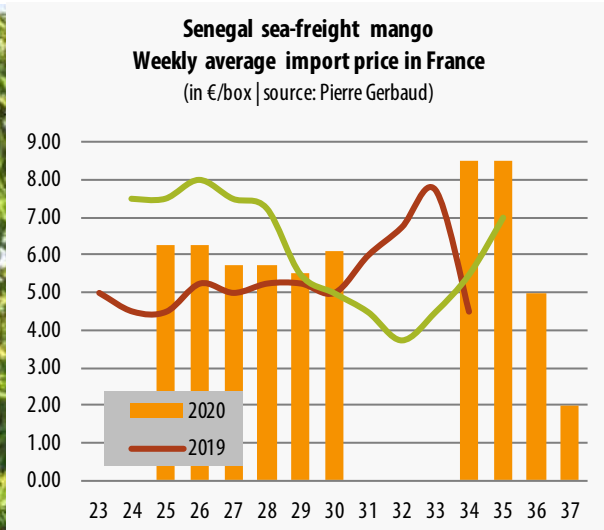
## A campaign split in two

The sea-freight campaign started later this year, in the second half of June. It began two weeks later in 2019. One third of the 10 300 tonnes of exports in 2020 came in June, with the remaining two thirds shipped in July. The first sales were made at a price of approximately €6.00/box, dipping to around €5.50/box, and then stabilising until the end of July. Senegal enjoyed satisfactory market conditions because of its own supply limitation, but also restrained shipments from competing origins (Puerto Rico, Dominican Republic). Senegal had an additional asset insofar as it was the only Kent supplier, slipping in between the end of the Malian campaign and the start of the Israeli campaign.

In the second half of July, the market saw a period of relative under-supply which helped rates strengthen. Yet paradoxically, it was also at this time that supply levels exhibited more fragile quality. The market exhibited a dichotomy, with high prices for good quality fruit, but in parallel sales at low prices for deteriorated fruit. At this point in the campaign, Senegalese shipments collapsed. Fruit from later blooms initially had to ensure the continuity of the shipments, but they were prac-

tically one month late, arriving in late August. It was tough for the supply to resume after such a break, after purchasers had switched to other origins. Nonetheless, Senegal remained the sole Kent supplier. Shipments proved to be of very average quality, explaining the rapid price drop registered at the end of the campaign. Fortunately, Senegalese shipments remained marginal at this time, limiting the collapse in economic results.

The interruption to Senegal's supply dragged down the economic results for the campaign, despite the positive trend in the first part of the season. Resuming a supply is always a tricky matter, since it is difficult to revitalise marketing operations, with purchasers switching to longer-lasting origins. In addition, the Senegalese campaigns often come to a complicated end due to the qualitative deterioration of the fruit. The fruit is exposed to frequent rainfall during harvesting, favouring fungal growth. After two downward campaigns, with 2020 affected by the health crisis, Senegal should in future return to export levels more in line with its recent trajectory, because of the genuine potential of its mango industry ■



# Mexico

## Ever bigger volumes

**A** summer supply origin, Mexico regained its mango export level from the 2010s. After a drop in shipments to Europe, reaching its lowest point in 2014, Mexico has gradually rejoined the ranks of supplier countries, increasing its shipments year on year. In 2019, it regained its level from 2011 (around 2 250 tonnes per year). In 2020, it broke this ceiling, with nearly 6 000 tonnes. While the figures registered for the European market might seem well below those of other origins, they illustrate the diversification of Mexico's target markets. This country is the world number one exporter country. Yet as we might expect, its flows are mainly aimed at the closer and more traditional North American markets, providing more than 60 % of total mango imports. The 6 000 tonnes shipped to Europe are merely a drop in the ocean compared to the 400 000 tonnes shipped to the USA and Canada. The Mexican calendar extends from January to October, and its role is supposedly proportionally comparable to that played by Brazil in the European supply. Its European season is shorter, extending from mid-May to mid-August, doubtless for two main reasons. On the one hand, the handover between the West African and Israeli campaigns leaves a relatively favourable window, and on the other hand, this period corresponds to the Kent production season.

Apart from a few sea container shipments, Mexican exports are more focused on air transport. The 2020 campaign began in the second half of May, with restrained volumes slowly rising to their peak in mid-July. This longer start can be explained, as for the other origins, by the dwindling air-freight capacities due to the health crisis. The increase in freight rates also slowed down the start of this campaign in quantitative terms.

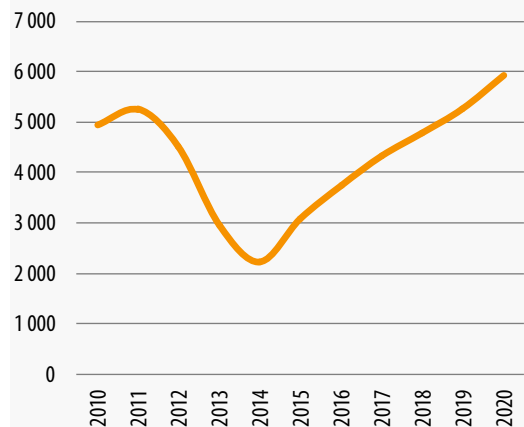
After some Haden shipments to begin the campaign, shipments focused on Kent, which obtained high prices for the first batches available. They dipped slightly at the end of the month due to ongoing lively competition from West African fruit, still available and often charging lower prices. In June, the quality of Mexican fruit decreased again, with prices following a constant downward trend, going in the space of a few weeks from €5.50-€6.00/kg to €4.50/kg. The situation deteriorated further in July due to the often mediocre quality. While fruit of satisfactory quality sold at around €4.00-€4.50/kg, numerous batches of advanced maturity or affected by fungal attacks sold at lower prices, with some on commission or at clearance prices. In early August, prices strengthened in spite of ongoing disparate quality, because of a more marked under-supply (€5.00-€5.50/kg). The campaign wound down earlier than in previous years, when it continued through practically the whole of August.

The quantitative rise in Mexican imports was not accompanied by clear success. The middling fruit quality and its short lifetime dented the renown generally enjoyed by fruit from this origin ■

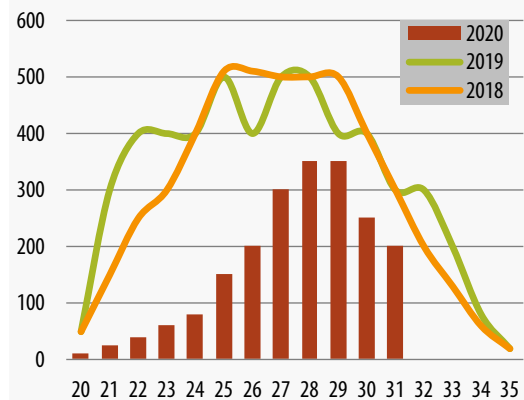


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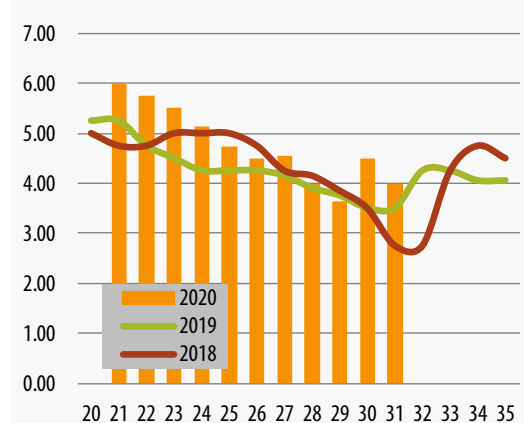
**Mexican mango - European Union - Imports**  
(in tonnes | source: Pierre Gerbaud)



**Mexican mango**  
**Weekly incoming shipments in Europe**  
(in tonnes | source: Pierre Gerbaud)



**Mexican mango - Weekly average import price on the French market** (in €/kg | source: Pierre Gerbaud)



# Israel

## A smaller campaign



Israeli mango exports to the European market reached their maximum in 2016 and 2017. Since then, there has been a downward trend, although the 2019 campaign regained a bit of ground. In 2020, the Israeli supply registered another downturn of nearly 4 000 tonnes from the previous campaign.

## A steady air-freight campaign

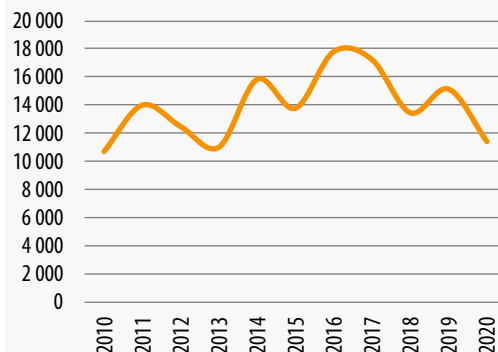
Israeli mangos began trading in late July, with the first batches of air-freight Aya and then Maya. These varieties remained available until early September. Their marketing was hampered by the presence of Kent from Senegal and Mexico, more popular among consumers. Sale prices settled at around €4.00/kg. Yet rates quickly strengthened to between €4.50 and €5.00/kg, insofar as the competing supply was decreasing, and frequently exhibited fragile quality and unreliable keeping. This situation lasted until the second half of August, when Kent took over in Israeli shipments. Kent sales were steady, at an average price of €4.50/kg. Kent volumes ran out of steam in the second part of September, giving way to a few shipments of Omer and Shelly for a fortnight. These products sold on a downward footing (€4.00/kg), and ended this origin's air-freight campaign.

## A good sea-freight campaign

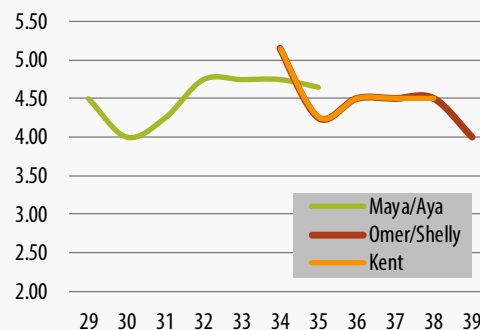
The first sea-freight shipments were made in the first or second week of August, when the market supply level was low. The Senegalese campaign was at a standstill, while the Dominican campaign was on the wane. With moderate quantities, Israeli products obtained high prices of between €7.50 and €8.00/box on average. The supply above all comprised Omer and Kasturi. August also brought the most intense flow. At the end of the month, Keitt became predominant in Israeli shipments. They continued to be supplied until mid-October, though with a distinct decrease in volumes. Their prices dipped gradually to reach an initial plateau of around €6.00-€7.00/box in September, before ending up at €4.00-€5.00/box for the final batches sold in the first half of October. Kent shipments were apparently smaller than in previous years, and concentrated in September. They earned steady value, on a footing of €6.50/box. From mid-September, market conditions became less favourable, with the progress made by Brazil and Spain.

Ultimately, the Israeli campaign profile was fairly similar to the 2019 campaign, though with smaller quantities. The origin consolidated its position as a major supply source to the European market during the summer period, and during the handover to the autumn supplier countries, mainly Spain, another Mediterranean origin ■

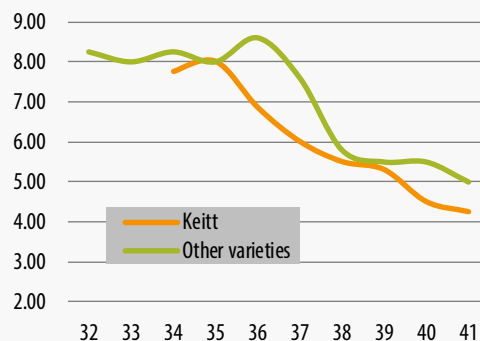
Israeli mango - European Union - Imports  
(in tonnes | source: Pierre Gerbaud)



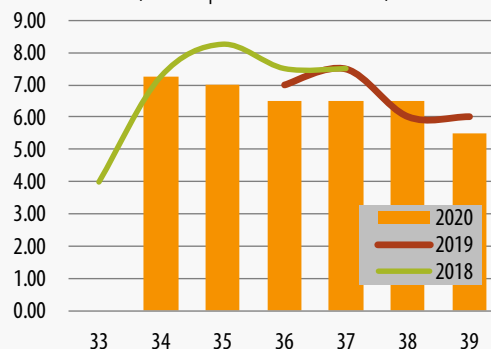
Israeli air-freight mango - Weekly average import price in France in 2020  
(in €/kg | source: Pierre Gerbaud)

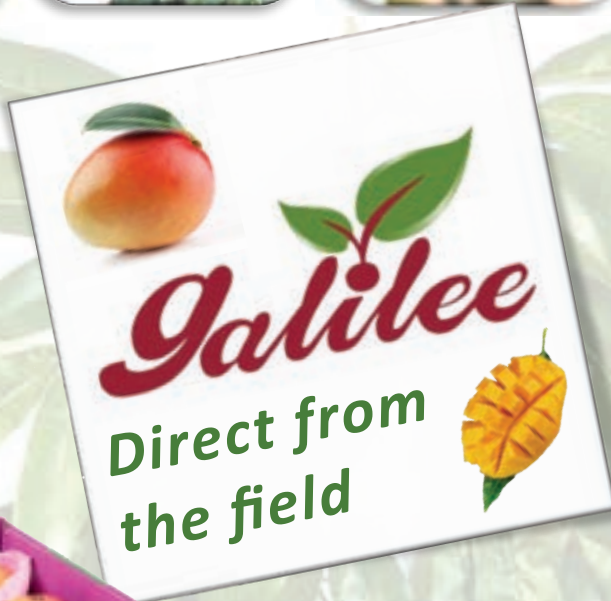


Israeli sea-freight mango - Weekly average import price in Northern Europe in 2020  
(in €/box | source: Pierre Gerbaud)



Israeli sea-freight Keitt/Kent mango  
Weekly average import price in France  
(in €/box | source: Pierre Gerbaud)





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# Spain

## A balanced campaign

As has been the case for several years, forecasts for the Spanish campaign issued at the beginning of summer are often overestimated in terms of sales. Not that they are incorrect - these forecasts reflect the scale of the blooms and fruit bearing at what is still a long time from the harvest. Their accuracy varies according to the year. They were similar for the past two campaigns (2019 and 2020), with high estimates. Yet the recurrent high temperatures in July and August substantially cut down the harvests. This heat affects mango fruit bearing, in particular causing high fruit droppage in its growth phase. This phenomenon explains the stagnation in Spanish shipments, in spite of expanding cultivation areas. Hence after a particularly abundant 2018 campaign, with exports of around 32 000 tonnes, the following two campaigns levelled out at around 22 000 tonnes.

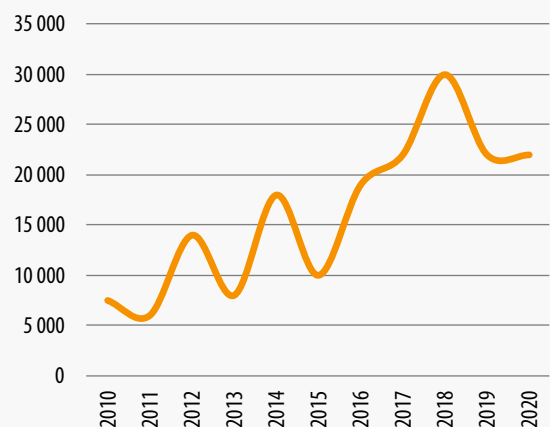
Overall, the 2020 campaign enjoyed good conditions, with mild competition from the two other origins supplying the market at this time of year: Brazil and Israel. The fairly steep decrease in Israeli shipments in October and the gradual start of the Brazilian Kent campaign maintained a favourable trading window for Spanish mangos.



The campaign began in late August-early September, with moderate volumes, one week later than the previous season. The supply made gradual progress, reaching cruising speed in the second half of September for Osteen, which formed the bulk of the Spanish potential. The shipments were topped up by a few Tommy Atkins batches as August passed into September. These finely coloured products earned slightly lower prices than those registered for Osteen, though high nonetheless. Osteen trading proved to be difficult in the first half of September, despite rather favourable market conditions. The frequent lack of fruit coloration and maturity partly explained this tough start to the campaign. From mid-September, the increase in volumes weighed down on the market, sending prices into a limited downward trend. The qualitative disparity of incoming batches resulted in widening price ranges, with differences of as much as €3.00/box.

In the first half of October, the gradual disappearance of Israeli produce left Spanish produce with a larger trading window, especially since the origin was reaching its campaign peak. This situation consolidated Osteen sales in the face of Brazilian competition that was livelier, but undermined by Kent shipments of variable quality. Osteen rates strengthened as the quantities entering the market gradually decreased. The final batches were sold in early November, and were replaced for the next three weeks by Keitt, selling steadily at around €8.00/box.

**Mango - Spain - Evolution of exports**  
(estimates in tonnes | source: Pierre Gerbaud)



**TROPS**

# MANGO TROPS

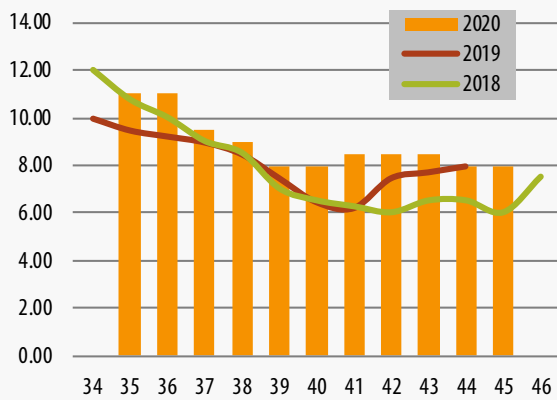
“ALWAYS GOOD”

**THE MANGO THAT NEVER  
LETS YOU DOWN**



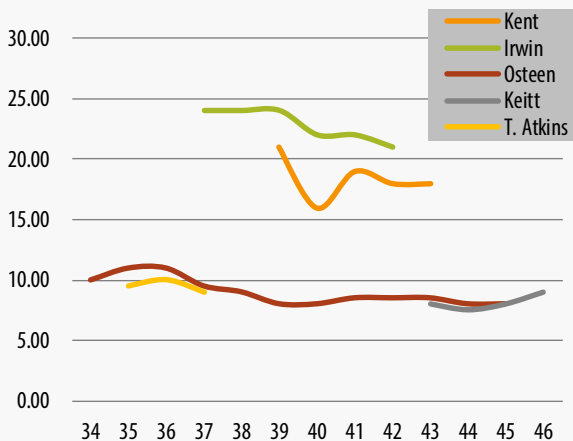
### Spanish Osteen mango - Weekly average import price on the French market

(in €/box | source: Pierre Gerbaud)



### Spanish mango - Weekly average import price on the French market in 2020

(in €/box | source: Pierre Gerbaud)



The Irwin and Kent varieties from Spain supplied the market on a more modest scale. This is the case in particular for Irwin, which is present on the market from September to mid-October, and sold mainly on the wholesale markets to stores specialising in top-end products. This variety was scarcer than in previous years, doubtless suffering more heavily from the August heatwaves in southern Spain. It obtained high prices throughout the season, despite a dip in the middle of the period. Meanwhile, the Kent supply was more abundant, with the campaign starting in the second half of September. The increase in volumes shipped, as well as the quality disparity in merchandise, meant distinctly wider price ranges. Batches of higher quality matched the air-freight fruit from Brazil, the supply of which was on the rise (€4.50-€5.00/kg). Meanwhile, fruit of more standard quality was trading from €3.00/kg. On this subject, we can note the adoption by several brands of a new box format, of the same type as used by Peruvian and Brazilian exporters (folding box of approximately 6 to 6.5 kg). At the height of the Kent campaign, good-quality batches traded at abnormally low prices (€3.50/kg), pointing to the development of intense competition between Spanish exporters.

In conclusion, with more restrained volumes of Osteen, though slightly bigger Kent and Keitt volumes, the 2020 Spanish campaign was similar to the previous one in terms of overall tonnage. Conversely, the economic results seem to be better, with the origin having enjoyed favourable market conditions, with less marked competition from Israel and Brazil. So Spain is consolidating its place as a market supplier in the autumn, with its specific variety Osteen now well received by consumers ■



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