INTERNATIONAL FRESH PRODUCE ASSOCIATION℠

U.S. Mango Market Report: 2021-2022

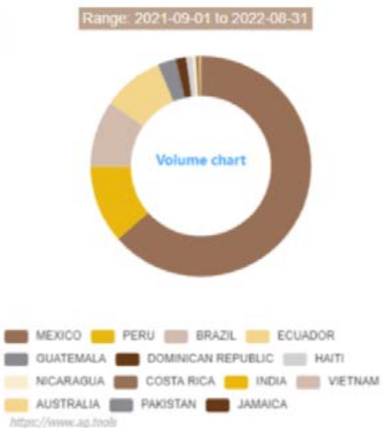
International Fresh Produce Association is committed to providing members with relevant market data and insights to guide their business considerations and decisions. This paper discusses the mango market in the United States from September 1, 2021, to August 31, 2022. The data was collected and analyzed by Ag Tools.

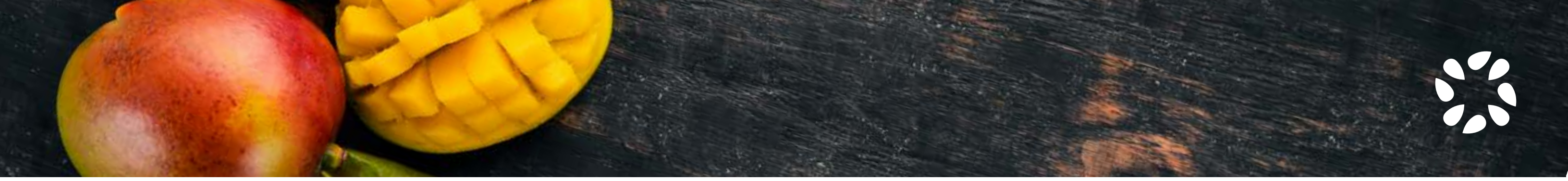
> **"Throughout 2022 the mango market grew. U.S. consumers consumed more than 1.1 billion pounds of mangoes from 14 world regions showing its increasing popularity."**
>
> *– Joe Watson, IFPA Vice President Of Retail, Foodservice, Wholesale Membership*

U.S. MANGO MARKET REPORT: 2021-2022

USA Volume Report

Location	Volume Lbs	Description	Var.%
MEXICO	743,463,457	85,744,877 lbs more than same period 2020-2021	13.04%
PERU	133,853,107	12,420,511 lbs less than same period 2020-2021	-8.49%
BRAZIL	114,318,850	39,932,490 lbs more than same period 2020-2021	53.68%
ECUADOR	104,659,474	13,698,259 lbs more than same period 2020-2021	15.06%
GUATEMALA	31,375,480	2,583,671 lbs less than same period 2020-2021	-7.61%
DOMINICAN REPUBLIC	18,062,427	3,988,553 lbs more than same period 2020-2021	28.34%
HAITI	10,608,175	12,008,293 lbs less than same period 2020-2021	-53.10%
NICARAGUA	6,295,157	1,558,978 lbs less than same period 2020-2021	-19.85%
COSTA RICA	4,656,994	976,144 lbs less than same period 2020-2021	-17.33%
INDIA	1,784,763	1,783,753 lbs more than same period 2020-2021	176609.21%
VIETNAM	1,134,848	59,743 lbs more than same period 2020-2021	5.56%
AUSTRALIA	424,146	321,926 lbs more than same period 2020-2021	314.93%
PAKISTAN	160,187	327,433 lbs less than same period 2020-2021	-67.15%
JAMAICA	59,834	127,225 lbs less than same period 2020-2021	-68.01%
Total:	1,170,856,899		





More than 1.1 billion pounds of mangoes were sourced from 14 regions, all of them outside the United States, and in some cases from places as remote as Vietnam, Pakistan, or Australia. Despite the small volume from these regions, they continue to attract attention. However, more than 93.6% of the supply is concentrated in four main regions:

- Mexico: 63.5%
- Peru: 11.4%
- Brazil: 9.7%
- Ecuador: 8.9%

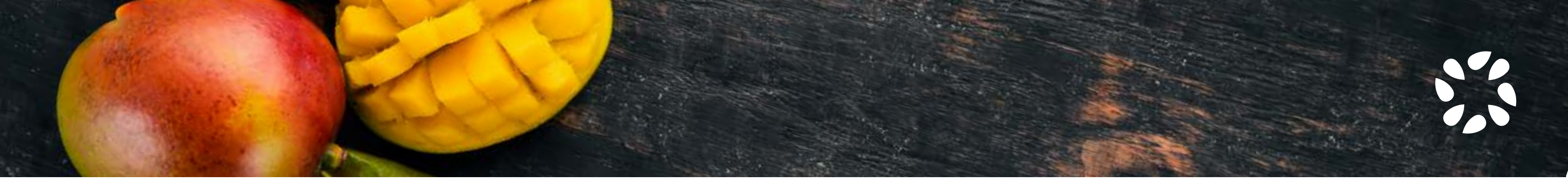
The other 10 regions held a share of 6.4% collectively – 74 million pounds of fruit. Some of these regions experienced growth while others contracted, but because their contribution is minimal, these shifts were not significant market factors.

GROWTH BY REGION VS. ANNUAL MARKET

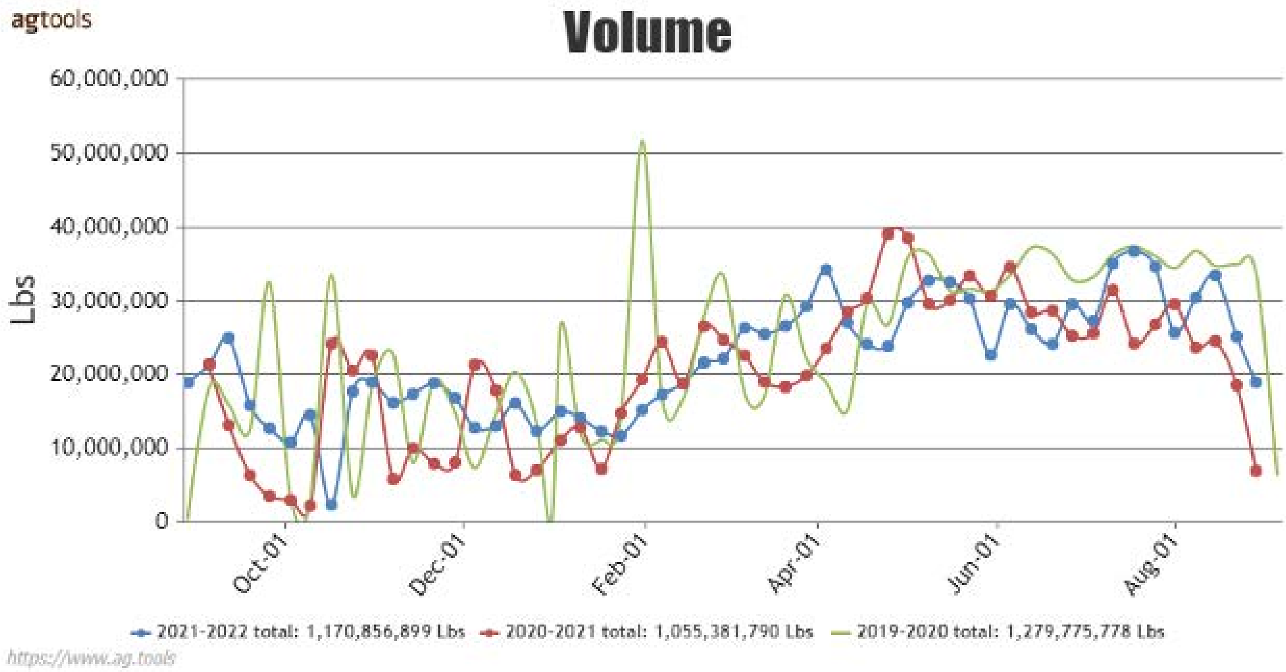
COMPARATIVE GROWTH OF MANGOES FROM SEPTEMBER 1ST 2021 THRU AUGUST 31ST 2022						
REGION	2021-2022	PART %	VAR (Lbs)	VAR %	2020-2021	PART %
Mexico	743,463,457	63.5%	85,744,877	13.0%	657,718,580	62.3%
Peru	133,853,107	11.4%	(12,420,511)	-8.5%	146,273,618	13.9%
Brazil	114,318,850	9.8%	39,932,490	53.7%	74,386,360	7.0%
Ecuador	104,659,474	8.9%	13,698,259	15.1%	90,961,215	8.6%
Rest of the regions	74,562,011	6.4%	(11,480,006)	-13.3%	86,042,017	8.2%
TOTAL (Lbs)	**1,170,856,899**	**100.0%**	**115,475,109**	**10.9%**	**1,055,381,790**	**100.0%**

During the study period, the market grew almost 11% or 115 million pounds: from 1.05 billion pounds in 2021 to 1.17 billion pounds in 2022.

- Mexico’s volume grew 13%, higher than the overall average growth, resulting in a greater market share.
- Peru lost market share – from 14% to 11.4% -- with volume dropping from 146 million pounds in 2021 to 133.8 million pounds in 2022.
- Out of the four primary regions, Brazil had the largest volume increase at 53.7%, with market share growing from 7% to 9.8%.
- Ecuador’s volume grew 15% more than the market average, reaching more than 104 million pounds.
- The minor regions, in aggregate, had a volume decrease of 13%.

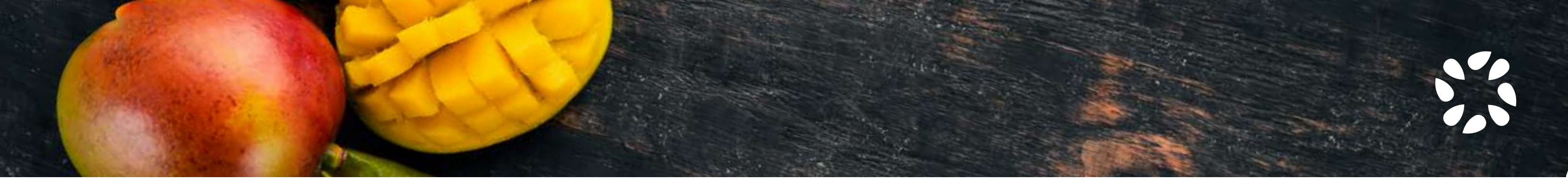


3-YEAR COMPARISON OF TOTAL WEEKLY MANGO VOLUME IN THE U.S. MARKET

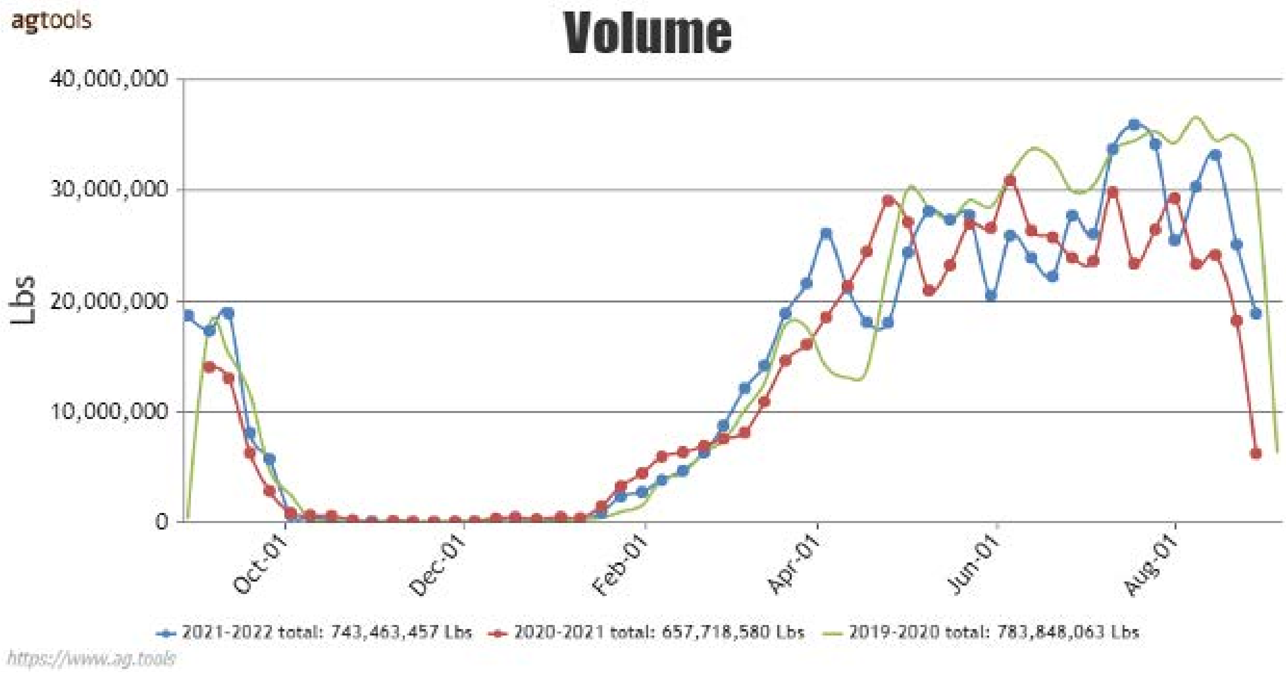


At the beginning of the 2019-2020 season (green line), the supply was variable until April, partly influenced by the arrival of shipments from South America, reaching top volume in the first week of February (exceeding 50 million pounds). In 2020-2021 (red line) these fluctuations occurred only between October and November. Once Mexican product entered the market, supply normalized and grew, reaching peak volume in the first and second week of May (nearly 40 million pounds, a slightly negative trend).

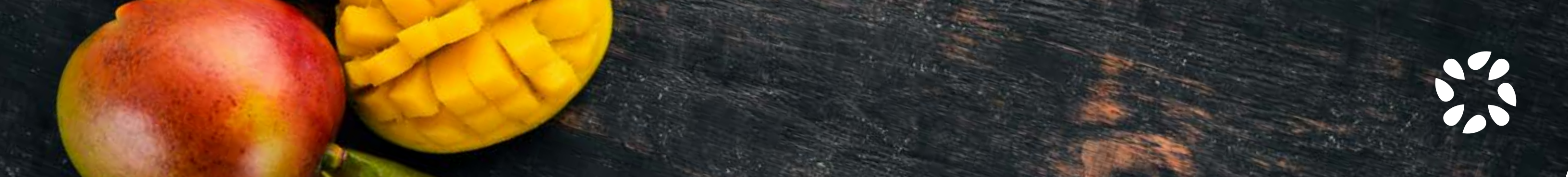
Supplies also varied at the beginning of the 2021-2022 season. However, beginning in November, supply normalized with a slightly negative trend through the last week of January. After that, the market sustained weekly growth until reaching a peak of almost 35 million pounds in the first week of April. Later, in the second week of July, volume exceeded 37 million pounds per week, the highest volume for the season.



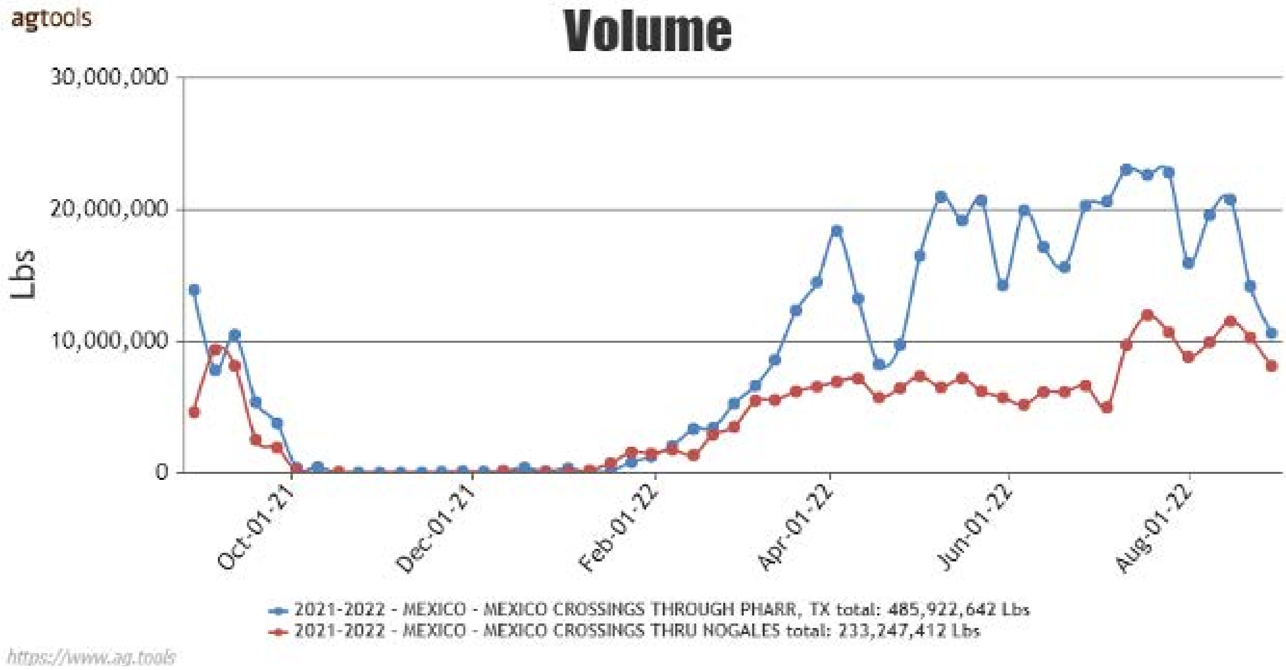
3-YEAR COMPARISON OF MEXICO WEEKLY MANGO VOLUME IN THE U.S. MARKET



Mexico's mango supply over the three prior years, began strongly in the second half of January and grew week by week. In 2020, the total volume was 783 million pounds with peak volume in the first week of August exceeding 36 million pounds. In 2021 total volume fell 16% compared to the previous year, at 657 million pounds with peak volume at 31 million pounds in the first week of June. During the 2022 season, volume recovered, reaching 743 million pounds, a 13% increase over the previous year, but still below 2020.

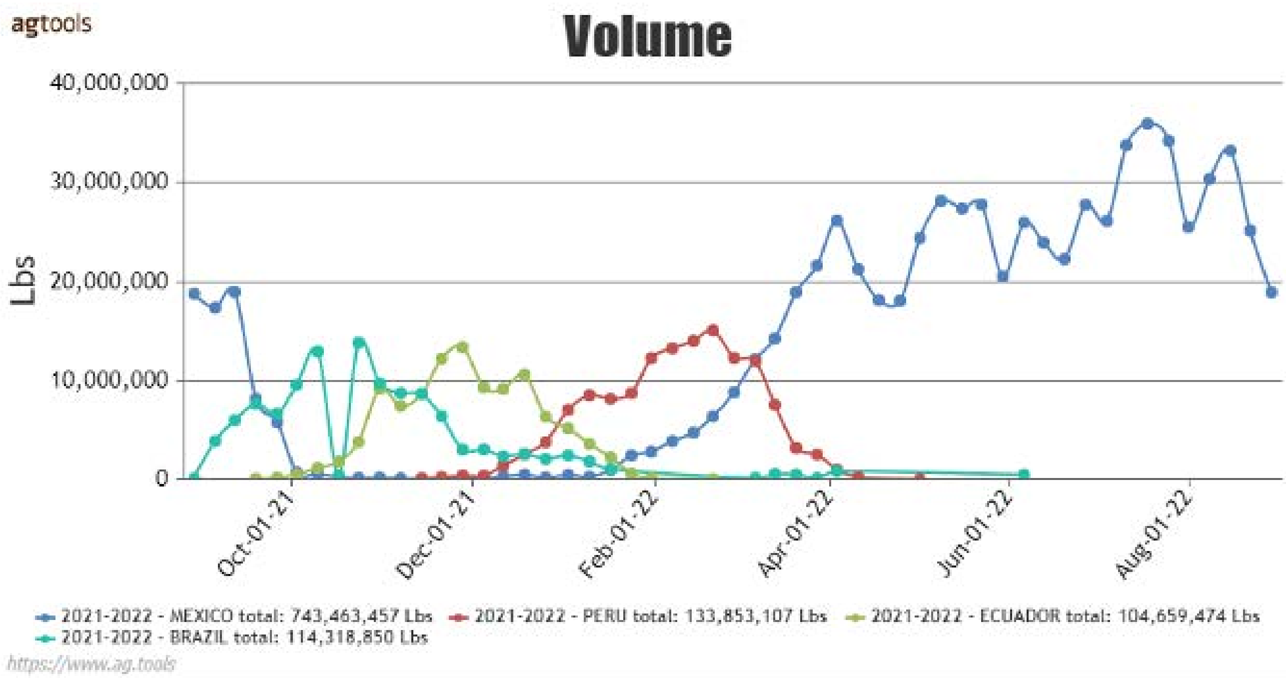


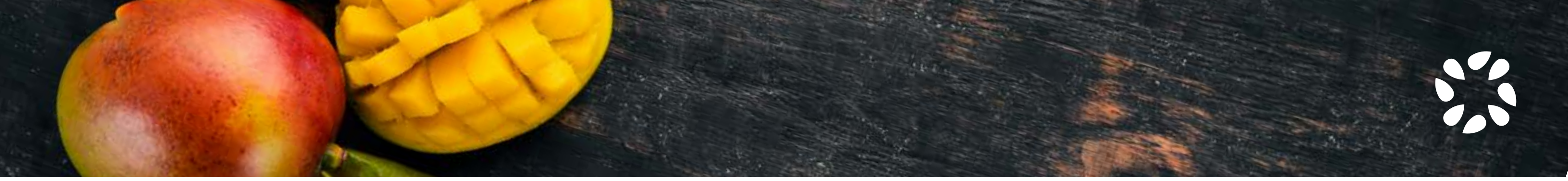
COMPARISON OF MEXICAN IMPORT VOLUME AT MAIN U.S. BORDER CROSSINGS



Out of the total 743 million pounds exported by Mexico to the United States, 65% entered through the Pharr, Texas, border crossing, while 31% crossed through Nogales, Arizona. The rest of the volume — just 3% — entered at other border crossings. Crossings are determined by the proximity of the producing areas as well as market destinations. Although exports cross throughout the year, the primary season runs from the third week of January through the third week of October.

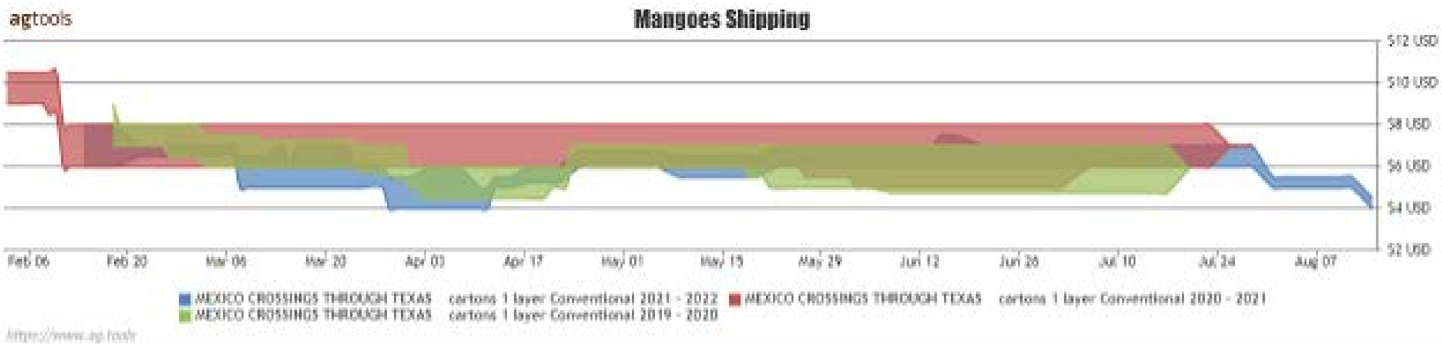
COMPARISON OF MANGO EXPORT SEASONS FROM TOP FOUR SUPPLIER REGIONS





This chart shows weekly volumes from each of the four main supply regions. The Mexico season (blue line), which drops off in October, is complemented by Brazil supplies arriving in September. Ecuador exports increase in November. The Peru season is December through April and complements the start of the Mexico season. Mexico dominates the remainder of the year due to its proximity to the U.S. market. This indicates that there is an opportunity for the top three regions of South America to grow their U.S. exports in the winter.

3-YEAR PRICE COMPARISON FOR ATAULFO VARIETY MANGOS (SIZE 16) IN TEXAS



Prices at the Pharr/McAllen crossing varied for some varieties, while prices for other varieties were more stable. Prices for the Ataulfo mango during the last three years were stable. In 2020 prices ranged between $5.00 and $8.00, with few variations, the most remarkable being in April, just at the time of the pandemic confinement. Prices subsequently returned to normal range. In 2021 (red line) prices showed the greatest stability, as there were only slight fluctuations in June. In the 2021-2022 season (blue line), the market was remarkably different. It began in a price range similar to previous years, but fell to $4.00 in April, recovering to $7.00 in May when it stabilized. But in August prices fell sharply – below $5.00 -- which is unprofitable for the entire mango marketing chain.

3-YEAR PRICE COMPARISON FOR TOMMY VARIETY MANGOS IN TEXAS

Tommy variety mango pricing in the Pharr/Mc Allen market presented much more volatility. In 2020 (green line) it had a very stable performance but with very low prices (under $5.00 all season). In 2021 (red line) the starting prices were above $5.00 with ups and downs. After reaching $7.00 in May, prices fell to the unattractive, unprofitable prior-year levels.

For the Ataulfo mango, 2022 presented significant price fluctuations. The starting price was $9.00 per box, the highest price recorded during the prior six years, though it lasted only a few days. The previous season had better prices through the end of March. April had its lowest price level despite an improved price trend from previous years. From May to mid-June, it had price fluctuations with an upward trend, reaching its highest level the third week of June, at $7.50 per box for a few days. In July, prices dropped, closing similar to 2020 and 2021 seasons. However, 2022 prices stayed higher on balance compared to the low, but stable, prices of the prior year.

> **“Thus, the mango is a fruit that has been growing among the tastes of consumers. Apparently this trend will continue, as new generations seek to include this type of food in their diet. There is a growth opportunity for this fruit in autumn/winter, where regions of South America can take advantage of the growth potential as consumer demand grows.”**
>
> *– Joe Watson, IFPA Vice President Of Retail, Foodservice, Wholesale Membership*

For more information, market data, and insights, consult IFPA’s online resource directory.