

## Practical market insights for your product

# Fresh mangoes in Germany

Consumer demand for mangoes in Germany is on the rise, after a slight dip in consumption in 2010. In the competitive German and EU markets, mangoes are commercially the second largest tropical fruit. Mango producers from Developing Countries (DC) have most potential by differentiating their products. Examples include high quality, reaching new market segments (ready-to-eat mangoes) and marketing stories.

**MANGO****PRODUCT DEFINITION**

Various species of mango trees exist; the mango most commonly sold in Germany comes from the *Mangifera indica*, also known as the 'common mango'. This tree is cultivated in tropical and sub-tropical regions. Additionally, mangoes are available in different cultivars/varieties, the main ones on the EU and German market being Tommy Atkins, Kent, Haden and Keitt. The colour of the fruit can vary from yellow or orange to red or green. In Germany, red-skinned species are preferred.

Globally, the largest producers of mangoes are India, China, Thailand and Mexico. Other mango producers include Brazil, Pakistan, Indonesia, Bangladesh, the Philippines, Nigeria, Spain and Peru.

**CLASSIFICATION OF COCONUT WATER**

- Harmonised System (HS) code: no separate HS code exists for mangoes, instead it is traded under 0804.50; 'Fresh or dried guavas, mangoes and mangosteens'

**PRODUCT SPECIFICATION**

**QUALITY** In the UNECE standard, mangoes are categorised into three classes; 'Extra' Class (superior quality), Class I (good quality) and Class II (satisfies minimum requirements).

These minimum requirements for fresh mangoes are that they are intact, sound, clean, fresh in appearance and free from: pests, damage caused by pests or low temperature, black stains, marked bruising, abnormal external moisture and any foreign smell and/or taste.

Additionally, the condition and development of the mangoes must be in a state that they can withstand transportation and handling and arrive in a satisfactory condition at place of destination.

**CONSIDERATIONS FOR ACTION**

For more information on fresh mangoes, please refer to the [CBI Product Fact-sheet on Fresh Mangoes in the European Market](#).

Please refer to the [UNECE](#) standard for mangoes for more information on the quality requirements for the different classes and size codes. This standard is voluntary, but commonly used in Europe as a reference for food quality.

Grade mangoes according to size, colour and maturity as based on the UNECE standard for mangoes. Ensure that the content of each package of mangoes is uniform and only contains mangoes of the same origin, variety, quality and size.

According to the UNECE standard, the minimum weight of mangoes is 150 gr. They are classified according to their size, from A – D.

Once harvested, mangoes are very sensitive and their quality deteriorates quickly. This can be the result of damages to the fruit, high temperatures, moisture (resulting in mould, rotting and spoilage), odour, inadequate ventilation or unclean containers.

#### CONSIDERATIONS FOR ACTION

Ensure that at harvesting the fruit is not overripe as this makes it difficult to sell on the German market.

Ensure that mangoes have the correct internal maturity and sufficient brix. For more information on maturity for specific mango varieties, please refer to a [mango maturity and ripeness guide](#). Although this is a US guide and as such not a requirement in Germany, it can be used as a reference guide.

Please refer to the [German Transport Information Service](#) for information on adequate transport and storage conditions of mangoes for the German market.

To be seen as a dependable supplier, consistent taste as well as other internal attributes (e. g. pulp fibrousness and aroma) is important. Products with consistent good taste and quality are of more interest to end-consumers and consequently to your buyers.

Colour and appearance (pulp firmness, size and shape) are indicated as important factors in purchasing decisions.

Aim for a consistent taste of your mangoes. Use the right seeds or varieties, be consistent in cultivation and ripening and employ thorough seasonal and logistic planning.

Use storytelling to differentiate your product. Focus on the growing and ripening conditions of your product.

In Germany, consumer preference is typically for red-skin species of mangoes, commonly Tommy Atkins, with the main suppliers of these species being Brazil, Peru and Spain. However, their popularity is waning in favour of the greener Kent variety.

For more information on cultivation and harvesting of mangoes, please refer to the mango profile from the [Traditional Tree Initiative](#), hosted by the USDA National Agroforestry Center.

**LABELLING** Enable traceability of individual batches.

Use the English language for labelling unless your buyer has indicated otherwise.

Labels must include the following:

- Product name
- Class (Extra, I or II)
- Batch code
- Name and address of exporter
- Size (code)
- Number of units
- Net weight in metric units
- Recommended storage conditions
- Organic: Name/code of the inspection body and certification number

## PACKAGED MANGOES



Source: Special Fruit

## PACKAGED MANGOES



Source: Indiamart

**PACKAGING** Mangoes are commonly packaged in single layer crates and cartons. Sometimes, the fruits are wrapped in paper or padded (wood wool, straw or hay) to prevent damages. Buyers might have specific packaging requirements as well.

Organic mangoes should remain physically separated from conventional mangoes.

Ensure preservation of quality by:

- Using new, clean and quality packaging.
- Protecting the cargo from moisture during loading, as to avoid mould and spoilage.
- Ensuring appropriate temperature, humidity/moisture and ventilation conditions during transportation.
- Protecting the cargo from pests such as beetles, moths, etc.

Please refer to the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruit and Vegetables](#) and the [German Transport Information Service](#) for more information.

## LEGISLATIVE REQUIREMENTS

Legal requirements are the minimum requirements which must be met by products marketed in the EU. Products which fail to meet these requirements are not allowed on the EU market. EU legislation sets the basis for legal requirements in the EU, which is generally implemented fully in Germany. Where Germany deviates from the EU legislation, information on the applicable German legislation has been added.

**GENERAL FOOD LAW** Food safety is the key issue in EU food legislation, in which the General Food Law is the framework regulation. The legislation also introduces requirements on traceability.

### CONSIDERATIONS FOR ACTION

Familiarise yourself with the relevant [Regulation \(EC\) 178/2002](#).

**MAXIMUM RESIDUE LEVELS (MRLs)** EU legislation has been laid down to regulate the presence of pesticide residues (MRLs) in food products.

Make sure that you comply with the MRLs in your mangoes, for more information on the levels check the relevant [MRLs for mangoes](#). Be aware that large retailers, especially in Germany, often have more strict MRLs than specified by [EU legislation](#). These retailers can allow even up to only 30% of the legal permitted levels, with a maximum of four components found.

**CONTAMINANTS IN FOOD** The EU food safety policy has set maximum levels for certain contaminants in specified products or product groups. Germany has established additional requirements on contaminants in food.

Familiarise yourself with the [German legislation on contaminants in food](#), which is additional to the [EU Regulation \(EC\) 1881/2006](#).

**MICROBIOLOGICAL CONTAMINATION OF FOOD** The EU has set microbiological criteria for food borne micro-organisms, their toxins and metabolites.

Ensure that you comply with the requirements on maximums laid down in [Regulation \(EC\) 2073/2005](#).

**PHYTOSANITARY CERTIFICATE** Mangoes exported to Germany often need a phytosanitary certificate, issued from the country of origin. They are listed under the Directive on Plant Health and as such require compulsory plant health checks. Specifically, the fruits are sensitive to the pest *Sternochetus mangiferae*, the mango seed weevil, as well as other pests.

#### CONSIDERATIONS FOR ACTION

Refer to Regulation [EC/1756/2004](#) for requirements on plant health. Familiarise yourself with the [Directive 2000/29/EC](#). Under Annex VI (page 170 – 171) this Directive provides an example of a phytosanitary certificate.

**HYGIENE OF FOODSTUFFS** The EU legislation on hygiene of foodstuffs (HACCP) is legally binding for food processors, and is recommended for farmers (primary production).

Ensure compliance with the requirements as laid down in [Regulation \(EC\) 852/2004](#).

**GENERAL PRODUCT SAFETY OF FOOD PRODUCTS** The EU introduced the European rapid alert system for food (and feed) products (RASFF) as a tool to exchange information on the enforcement of EU food safety legislation. For fresh mangoes, the main reasons for border rejections are spoilage and the presence of prothiophos, omethoate and dimethoate.

For more information check the relevant [Regulation \(EC\) 178/2002](#). Please refer to an overview of the [RASFF database](#) for notifications on mango.

**FOOD CONTACT MATERIALS** The European Union has laid down rules for materials and articles coming into contact with food (including for example packaging) in order to prevent any unacceptable change in the composition of the foodstuffs and to protect human health.

Germany has established voluntary requirements on food contact materials in addition to the framework legislation [Regulation \(EC\) 1935/2004](#), as well as Directives 84/500/EEC, 2007/42/EC, 78/142/EEC and 93/11/EEC. For more info on these additional requirements refer to the German [Federal Ministry of Food and Agriculture](#).

**FOOD CONTROL** All food products entering the EU are subject to official controls to check whether they are in compliance with the relevant food legislation. Mangoes from the Dominican Republic require an increased level of official controls for pesticide residues.

Familiarise yourself with the [Regulation \(EC\) 882/2004](#) on official controls to verify compliance with food law, which is applicable in Germany as well. For information on increased levels of control refer to Regulation (EC) 669/2009.

Check the [CBI overview of buyer requirements for Fresh Fruit and Vegetables](#) for more information.

## NON-LEGISLATIVE REQUIREMENTS

Additional, non-legal requirements reach beyond legislation, as companies can go further in their requirements than legislation. The main categories of additional requirements are environmental requirements and social (labour) requirements.

### GLOBAL GOOD AGRICULTURAL PRACTICE (GLOBAL G.A.P.)



The most important non-legislative requirement is that of G.A.P. Most German and EU retailers demand compliance with this global standard and certification for agricultural products.

#### CONSIDERATIONS FOR ACTION

Please refer to [GLOBAL G.A.P.](#) for more information on compliance requirements. In order to supply German supermarkets, you need to comply with this standard.

[Buyers are increasingly asking for G.R.A.S.P. certification \(Global G.A.P. Risk Assessment on Social Practice\), an extension of Global G.A.P., for more information on the standard please refer to the \[Global G.A.P. website\]\(#\).](#)

### THE BUSINESS SOCIAL COMPLIANCE INITIATIVE (BSCI)



The BSCI code of conduct has been developed to improve social conditions in sourcing countries. Currently, this standard is only required for bananas in a few supermarkets, but it may become more important in the future.

Even though it is not yet required for mango producers, keep a close watch on the developments of BSCI in Germany, as it could become an industry requirement in the future. You may ask such information from your buyers or German importers. For more information, please refer to the [BSCI website](#).

### FOOD SAFETY MANAGEMENT



Buyers commonly require their suppliers that they have a quality/food safety management system in place. These systems require companies to demonstrate their ability to control food safety hazards in order to ensure that food is safe at the time of human consumption.

Suppliers can apply a basic HACCP system. However, if they aim to supply food manufacturers more directly, it is necessary to have a certified food safety management system recognised by the Global Food Safety Initiative, such as [ISO22000](#) or [IFS](#). The IFS standard has been developed by a union of German supermarket chains, [Hauptverband des Deutschen Einzelhandels](#) (HDE) and is most important for supplying German supermarkets.

### ORGANIC

The EU has established requirements on production and labelling with which an organic product of agricultural origin must comply, in order to be marketed in the EU as 'organic'.

If you choose to obtain a certificate for organic production, find out more about the following three Regulations: [Regulation \(EC\) 834/2007](#) on organic production and labelling, [Regulation \(EC\) 889/2008](#) on organic production, labelling and control, and [Regulation \(EC\) 1235/2008](#) on imports of organic products from third countries.

## SUSTAINABLE STANDARDS



There are also non-legal requirements related for sustainable sourcing and fair trade. Of the standards available, Fairtrade certification from Fairtrade International is most important on the German market.

### CONSIDERATIONS FOR ACTION

For more information, check the [Fairtrade International and FLO-cert certification requirements](#) and [Fairtrade minimum prices](#). For more information on the developments in fair trade certification, please refer to the Market Trends.

## DOCUMENTATION

Buyers need well-structured product and company documentation. Documentation should include information on fumigation.

Buyers will appreciate a commercially oriented Product Data Sheet with photos, information on origin and bibliographic references, where available. Especially in Germany, background information on your fruit production is highly appreciated and even demanded by buyers.

## DELIVERY TERMS

Pay attention to strict compliance with delivery terms as agreed upon with your buyer.

Familiarise yourself with [German delivery terms](#), which are based on [international delivery terms](#)

## WEBSITE

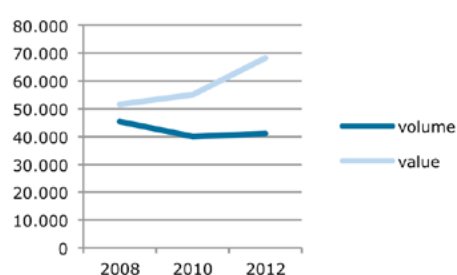
European buyers look for credible suppliers. You can improve the perceived credibility of your company by developing your website accordingly.

The website of [Freshtrop](#) provides a good example of a website that enhances the credibility of a company. This website has a professional image with clear and relevant information on the company and its product range.

## TRADE AND MACRO-ECONOMIC STATISTICS

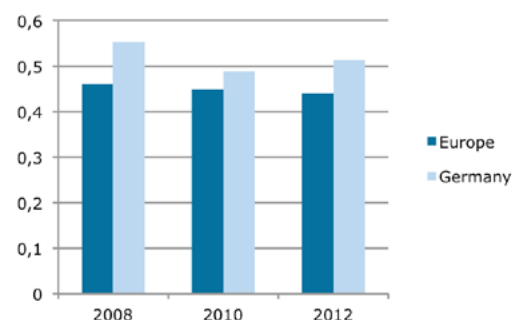
No separate records for trade in mangoes are available; they are included in trade statistics of fresh and dried guavas, mangoes and mangosteens. Analysis of Norwegian trade demonstrates that the main portion of this product group consists of mangoes as Norway does register trade in these products separately. Compared to total Norwegian imports of fresh and dried guavas, mangoes and mangosteens, 99 % of the volume and 98 % of the value is attributed by mangoes. In addition, various sources state that, after bananas, EU imports of mango represent one of the largest product groups of tropical fruits.

**FIGURE 1: TOTAL GERMAN CONSUMPTION\* OF FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS VALUE IN € THOUSAND AND VOLUME IN TONNES**



\* Apparent consumption calculated as imports-exports  
Source: Eurostat, 2013

**FIGURE 2: GERMAN CONSUMPTION\* OF FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS COMPARED TO THE EUROPEAN AVERAGE, PER CAPITA, VOLUME IN KG**



\* Apparent consumption calculated as imports-exports  
Source: Eurostat, 2013

### INCREASED GERMAN CONSUMPTION OF (HIGHER VALUED) MANGOES

German consumption of mangoes in terms of volume decreased by almost 2.5 % annually, as from 2008, to over 42 thousand tonnes in 2012. However, consumption of mangoes in value increased annually by 7 %, indicating an increase in consumption of higher valued mangoes.

#### CONSIDERATIONS FOR ACTION

Monitor developments in German (per capita) consumption, because in an increasing market there is more room for new suppliers. Compare German imports and exports of mangoes to determine consumption by using the [Export Helpdesk of the European Commission](#).

German per capita consumption of mangoes is higher than the average EU + EFTA per capita consumption. The difference was the smallest in 2010 (over 9 %) as German per capita consumption decreased at a higher rate than the European average. However, from 2010 to 2012, German per capita consumption increased at a larger rate than the European average and German per capita consumption was higher than the European average.

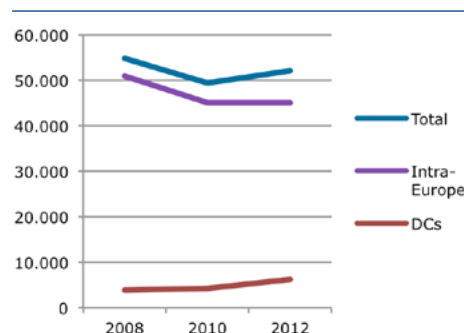
A higher per capita consumption in Germany compared to the EU average indicates that this market offers good potential for exports of mangoes.

According to Agricultural Market Information (AMI), retail sales of mango in Germany in the first quarter of 2012 were lower than in the two previous years. This was caused by a significant increase in prices, mainly due to smaller available supply from Peru. Therefore, at higher global supplies, and resulting lower prices, there is still potential for exports of mango to Germany.

#### CONSIDERATIONS FOR ACTION

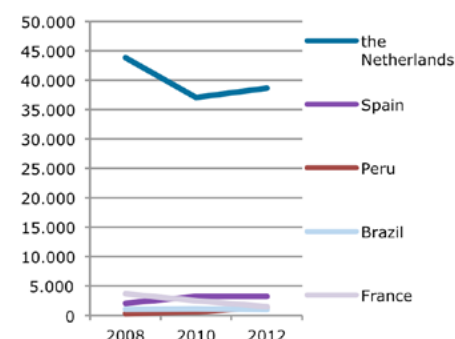
For more information on German markets for various agricultural products, including mango, use the website of [Agricultural Market Information](#). This website gives an indication towards the potential for mangoes in Germany.

**FIGURE 3: GERMAN IMPORTS OF FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS, VOLUME IN TONNES**



Source: Eurostat, 2013

**FIGURE 4: LEADING SUPPLIERS OF FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS TO GERMANY, VOLUME IN TONNES**



Source: Eurostat, 2013

#### INCREASE IN DIRECT SOURCING OF MANGOES

Since Germany does not produce mangoes, the country is entirely dependent on imports.

Total German imports in volume of mangoes decreased annually by more than 1 % from 2008 – 2012, to 52 thousand tonnes. However, imports in volume from DCs increased by 13 % in the same period. The annual change in total German imports of mangoes was mainly caused by a dip in imports from 2008 – 2010, after which the market recovered from 2010 – 2012. Imports in value from DCs increased at a higher rate (over almost 21 %), indicating that import prices increased.

The Netherlands is still by far the largest supplier of Germany in mangoes. The country's share of total German imports in volume amounted to 74 % in 2012.

Between 7 and 12 % of total imports in volume originated from DCs from 2008 – 2012. In this period, German imports (volume) from European sources decreased, except for Spain and Belgium. Imports from Spain, the sole European producer of mangoes and large re-exporter as well, increased annually by almost 12 %.

Consider reaching the German market by using the Netherlands as an intermediary. Even though its role as a trade hub to Germany decreased slightly during the review period, it is expected to remain strong the coming years.

Both online and offline (trade fairs) market research will be an invaluable way for DC exporters to understand market needs and to discover ways to differentiate. Please refer to the [Useful Sources](#) in this document.



Interestingly, imports in terms of value increased by over 7 % in the same period, to over € 68 million. This indicates that price per unit of imports increased by 10 % annually. Per unit export price increased at a higher rate, indicating that Germany adds value to the mangoes for re-exports (e.g. ripening or re-packaging mangoes).

#### CONSIDERATIONS FOR ACTION

As imports in value increased at a higher rate than imports in volume, focus on providing value-added products. Examples include high quality, ready-to-eat or sustainably certified mangoes.

With the exception of Brazil, imports from direct suppliers of mangoes increased from 2008 – 2012. This points to a shift towards direct sourcing and away from European re-exporters of mangoes, such as the Netherlands (–3 %).

As Germany is increasing direct sourcing of mangoes, this offers opportunities for DC exporters to start or increase supplies to the German market.

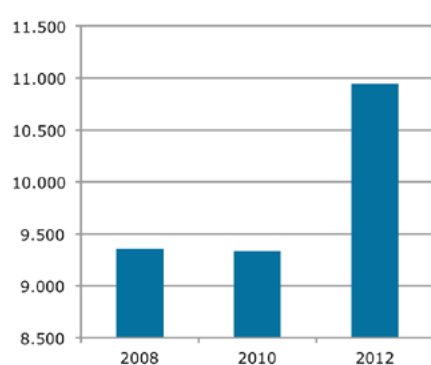
Some growing DC suppliers to Germany of mangoes, in volume from 2008 – 2012, were Peru (+49 %), South Africa (+142 %), Ghana (+11 %), India (+7 %), Thailand (+3 %) and Pakistan (almost +1 %). Please note that these countries accounted for only 6 % of total German imports (volume).

Monitor production of the main suppliers of red species (the favorite in Germany), Brazil, Peru and Spain, as these are competitors for DC exporters from other countries.

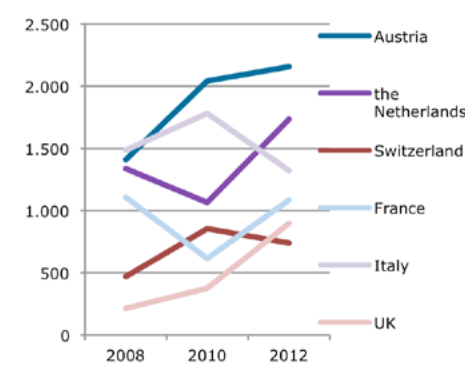
Production of mangoes is extremely high in south-western Asia (e.g. India); however, as domestic consumption is also very high in these countries, few mangoes make it to international markets. Additionally, not all varieties produced in these countries are suitable for export. Some varieties are less popular internationally, as the main markets focus on Tommy Atkins, Kent and Keitt, or have unfavourable storage capabilities.

Even though red-skin mango species, such as Tommy Atkins, are still most popular in Germany, greener varieties have an increased potential on the market. For an overview of mango varieties, please refer to the [Good Fruit Guide View](#) from the UK.

In addition, industry sources have pointed towards an increase in global production of mangoes. Within five years, this is expected to substantially increase global available supply of mangoes, resulting in lower prices and increased usage of the fruit.

**FIGURE 5: GERMAN EXPORTS OF FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS, VOLUME IN TONNES**

Source: Eurostat, 2013

**FIGURE 6: TOP 6 EXPORT DESTINATIONS OF GERMAN FRESH AND DRIED GUAVAS, MANGOES AND MANGOSTEENS, VOLUME IN TONNES**

Source: Eurostat, 2013

**SMALL, BUT GRWOING, REGIONAL EXPORTER OF MANGOES**

German exports (volume) of mangoes increased significantly between 2010 and 2012 (over 17 %) while between 2008 and 2010 it was relatively stable. Re-exports of Germany increased, as a larger share of imports was destined for exports from 2008 – 2012 (+5 % annually).

In the period 2008 – 2012, Germany exported around 20 % of imports; shares in volume and value were relatively similar.

In 2012, German exports of mangoes were almost entirely (98 %) destined for other European countries. The top 6 export destinations were Austria, the Netherlands, Switzerland, France, Italy and the UK, which together imported almost 73 % (volume) of mangoes. Value of exports to these countries was higher than volume (77 % of total exports), indicating that these countries demanded higher quality mangoes than other importing countries, for example ready-to-mangoes that have been ripened in Germany.

**CONSIDERATIONS FOR ACTION**

Consider using Germany as a first entry point to reach neighbouring countries in Europe, since Germany is a growing regional re-exporter of mangoes.

With the exception of Italy, German exports to its top 6 export destination increased from 2008 – 2012. Annually, exports in volume increased most to Austria (+11 %), Switzerland (+12 %) and the UK (almost +44 %). Of these, Switzerland and the UK were the smallest importers of German mangoes, amounting to almost 7 % and 8 % respectively.

**MARKET TRENDS****CONVENIENCE**

As consumers are becoming familiar with mangoes, they are increasingly demanding mangoes that are easy to consume. Examples include ready-to-eat, cut or mixed mangoes. Most opportunities for mango exports to Germany are a response to this trend, specifically ready-to-eat mangoes (mangoes that are ripe at purchase).

Be aware that production of ready-to-eat mangoes requires excellent logistical planning, ripening facilities, as well as appropriate transportation and cooling facilities. In addition, ensure that you produce the right mango variety for production.

Keitt and Kent mango varieties hold opportunities for the rising ready-to-eat segment. These varieties are better suited to adhere to the specific ripening and transport conditions to deliver ready-to-eat mangoes, as they maintain their quality. Tommy Atkins is not suitable for this specific ripening process. Ready-to-eat mangoes are commonly transported via sea freight, instead of air freight and are often further ripened in Germany.

#### CONSIDERATIONS FOR ACTION

Differentiate your product by supplying ready-to-eat mangoes, new varieties or sustainably produced and certified mangoes.

#### VARIETY DIFFERENTIATION

The common variety Tommy Atkins is slowly making way for new varieties (most commonly Kent and Keitt) and growing imports from new supplying countries (e.g. Thailand and Pakistan). As the market for particularly Tommy Atkins is reaching maturity, other varieties have increased opportunities to enter the market as diversified products.

#### ORGANIC CERTIFICATION

Opportunities exist for organic mangoes in Germany, with the varieties Keitt and Kent being more commonly sold with organic certifications. Industry sources indicated that, currently, sufficient supplies of organic mangoes are available on the German market to meet demand. However, as Germany is the largest and still a growing EU market for organic food, demand for organic mangoes may grow in the future. Sales of organic food has tripled from 2006 – 2012 and 27 % of sales were realised by the fruits and vegetables sectors. German consumption of organic products is rising at a steady, although lower, pace. Consumers link organic fruit, such as mangoes, to health and a better taste. According to the ITC, mangoes are among the fastest growing tropical fruits.

Keep a close watch on the developments in the German market for organic mangoes, e.g. by talking to organic importers. For more information on where to find these, please refer to the Market Channels and Segments. For more information on the EU requirements for organic certification, refer to the Non-legislative requirements. Always discuss your options for organic certification with your (potential) buyers.

Data from IFOAM and FiBLE indicate that from 2008 – 2011 the global land area for organic production of tropical and subtropical fruit increased by 13% annually, to 190,000 hectares (0.8% of total land for these products). In 2011, 13% of this land was used for mango production, the third largest product in this group, after bananas and avocados.

Please refer to [Organic World by FiBL](#) (German Research Institute of Organic Agriculture) for more information on global organic agriculture.

#### ETHICAL CERTIFICATION

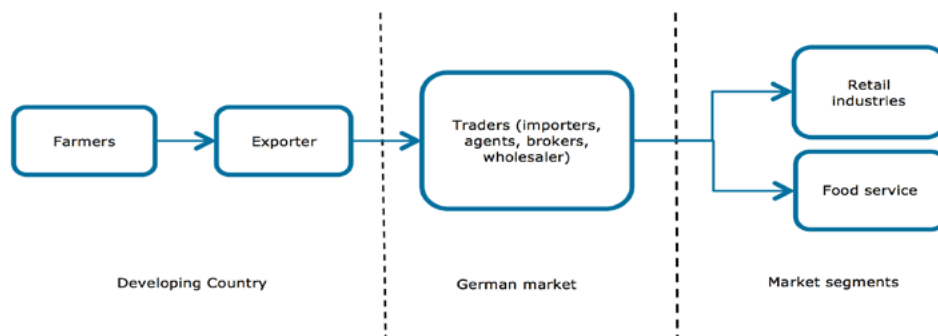
In general, there is an increased interest in ethically sourced food products in Germany. According to industry sources, stand-alone fair trade certification offers limited opportunities for mangoes. However, opportunities are higher when it is combined with organic certification, as organic certification itself offers more opportunities than fair trade. Bananas were among the first products with this dual certification. It is likely that its popularity will spread towards other exotic fruits, such as mango, in the future.

Always discuss your options in obtaining fair trade certification with your (potential) buyers. Be aware that even though current market opportunities are limited, this may change in the future. Determine whether there is sufficient market potential for your fair trade certified mangoes before obtaining certification.

For more information on general trends in the European market for fresh fruits and vegetables, please refer to [CBI Trend mapping](#).

## MARKET CHANNELS AND SEGMENTS

MARKET CHANNELS **FIGURE 7: MAJOR MARKET CHANNELS FOR MANGOES**



Please refer to [CBI Market channels & Segments](#) for more information.

### SHORT VALUE CHAIN

Mangoes are among the larger exotic fruit species on the market with high and increasing import volumes. As such, the fruit is moving towards a commodity product, even though it is not there yet.

Most mangoes sold in Germany are sold at various retailers, with food service outlets (e. g. catering industries) representing a smaller market channel. As is similar in other northern European countries, the main retailers include supermarkets, with a smaller role for street markets and specialised stores.

### CONSIDERATIONS FOR ACTION

For retail outlets such as supermarkets, ready-to-eat mangoes are increasingly demanded. If you supply to supermarkets, ensure that you can deliver ready-to-eat mangoes. Be aware that you know exactly how to harvest these mangoes so that they can consistently mature in the ripening facilities of companies in Germany or other European countries.

Because of its nature, mangoes require little additional processing in the country of origin or in Germany. Consequently, the value chain is relatively short. Common activities taken on in the country of origin are sorting, washing and packing of the mangoes. German or other European importers or traders often ripen ready-to-eat mangoes and often re-pack the mangoes for the consumer market.

For organic mangoes, specialised importers exist in Germany. Examples are [BioTropic](#) and [Lehmann Natur](#). Specialised importers in other Western European countries, such as [Pronatura](#) in France or [Eosta](#) in the Netherlands, export organic mangoes to Germany as well. Additionally, organic mangoes are more commonly sold at specialised organic shops as well as some German supermarkets such as [REWE](#) and [Edeka](#), instead of discounter supermarkets.

If you export organically certified mangoes, focus your sales on relevant specialised importers. Additionally, if you want to find out more on the market potential for organic mangoes in Germany, contact organic importers. For an overview of organic importers, please refer to [www.Bio-markt.info](http://www.Bio-markt.info) or [www.Organic-bio.com](http://www.Organic-bio.com).

## MARKET SEGMENTS

### MARKET DIFFERENTIATION OPPORTUNITIES

Mangoes are commonly sold directly to the consumer market in retailers. The segments on the German market vary from low-end, to middle- and high-end mangoes. High-end products are of superior quality ('Extra' Class), or have added value in terms of certifications or catering to a specific niche segment, e.g. ready-to-eat mangoes.

#### CONSIDERATIONS FOR ACTION

Differentiate yourself on the market by supplying mangoes of superior quality or by complying with organic certification standards.

Ready-to-eat mangoes represent the fastest growing consumer segment, which drives consumption of mangoes in Germany. Exporters need to guarantee the right internal maturity and ripeness of mangoes for this segment.

For more information on ready-to-eat mangoes, please refer to the Market Trends.

Organic or dual certified mangoes represent a small share of the total German market for mangoes.

For more information on the trends for organic and/or fair trade certified mangoes in Germany, please refer to the Market Trends.

## PRICES

### LARGE VARIATIONS IN PRICES FOR FRESH MANGOES

Prices for fresh mango vary based on variety, size, country of origin and time of year. Import prices can vary from € 2.50 per 4 kg for the Tommy Atkins variety when supplies are plentiful, to € 9.00 per 4 kg, for the same variety and origin, four weeks later. This indicates that temporary changes in supply can have large effects on prices.

For an example of prices of mangoes in Germany, please refer to the overview of [Fresh Fruit Portal](#). This overview commonly lists import prices for mangoes from Brazil, Peru and Ecuador, with occasional prices for mangoes from Spain, Mexico, Ivory Coast, Costa Rica and Israel.

Special varieties, such as Edward from Peru or Shelly and Omer from Israel can be priced much higher, between € 9.75 and € 15.00 per 4 kg, as these mangoes are often transported by airplane to Germany.

Reduce fluctuations in prices of your raw materials through agreements with your suppliers.

In addition, mangoes from Spain are generally higher priced than the same variety from countries outside of Europe. To compare; in the same time frame, Mangoes from Spain (Osteen) were priced at € 10.00 per 4 kg, whereas Brazil offered Tommy Atkins mangoes at € 5.75 – 6.75 per 4 kg.

Use organic certification standards to obtain a premium pricing. In Germany, there is a market for organic mangoes, however, always discuss these options with your buyers.

According to industry sources, future prices of mangoes are expected to decline as global production is increasing.

Transportation costs make up a large part of the added value for mangoes. Depending on the season and consumer segment, mangoes can be transported by sea or air. Ready-to-eat mangoes for the German market are often transported by sea, whereas air transport is more relevant for high quality, sun ripened mangoes. These later mangoes are more commonly exported to Southern European countries.

#### CONSIDERATIONS FOR ACTION

Find out what the best transportation is for your product and consumer segment. Discuss the options with your buyers.

Industry sources indicated that organically certified mangoes are sold at a premium on the German market. However, the size of this premium depends on the quality of the fruit, the season it is sold in and available supply of organic mangoes. As there is a Fairtrade standard for mangoes, a Fairtrade minimum price and premium have also been specified for various regions and countries.

For more information on Fairtrade prices, please refer to the [pricing database](#) as provided by Fairtrade International.

## MARKET COMPETITIVENESS

### COMPETITIVE GLOBAL MANGO MARKET

Mangoes from outside of Europe are available all year round, as production is spread around different tropical regions. In Spain, the sole European producer of mangoes, the fruits are only available from September to November. As a producer outside of Europe, you have a competitive advantage outside the Spanish season. From September to February, Brazil is the main producer of mangoes.

Regarding organic mangoes, industry sources indicated that Peru, Ecuador, Brazil and West-African countries (e.g. Burkina Faso) are the main suppliers and sources of competition.

For more information on the potential of mangoes in other European countries, please refer to the [CBI Product Factsheet: Fresh Mangoes in the European Market](#).

Keep a close watch on mango production in other regions that produce at the same harvesting season. You may request such information from your buyers.

As mangoes are often sold through large retailers in Germany, such as supermarkets, these place pressure on mango producers and exporters to supply consistent, good quality products at competitive prices and constant supplies. This is a major barrier to enter the market.

Explore your potential for mango products in addition to fresh mangoes, to reach market diversification. Examples include canned or dried mangoes, or processing mangoes into pulp, juice or mango kernel oil (for the cosmetics market). These latter products are of special interest for damaged mangoes that cannot be sold on the fresh mango market.

Worldwide, the production of mangoes is increasing, which leads to a higher rate of global competition. For example, industry sources indicated that the UK is investing in mango production in African countries, such as Senegal, with Spain substantially increasing its production as well. Often, there is fierce rivalry between competitors on the market.

As a fruit, other mango producers are not the sole source of competition. An increasing diversity of fruit supplies to Germany is competing with mangoes, since consumers see these as substitute products. Examples include common and new tropical fruits, such as bananas, pineapples and papayas, as well as the large markets of non-tropical fruits (various melons, apples, pears etc.).

#### CONSIDERATIONS FOR ACTION

Use marketing (e.g. storytelling, novel packaging, recipes), certification standards (organic) or premium quality (e.g. ready-to-eat) production to differentiate yourself on the market as a supplier. As such, you do not compete on price alone, which can be difficult.

Meeting (non-) legal buyer requirements is a major buyer requirement to reach the market for mangoes.

In addition, the consistent cooling of mangoes after collection requires large amounts of energy and an investment in cooling equipment.

Producers of mangoes can cooperate to share the investments in equipment for cooling and transporting the mangoes.

Please refer to [CBI Market Competitiveness for Fresh Fruit & Vegetables](#) for more information.

## USEFUL SOURCES

### TRADE FAIRS

Visiting or even participating in trade fairs is highly recommended as one of the most efficient methods of testing market receptivity, obtaining market information and finding prospective business partners. The most relevant trade fairs for exporters of mangoes are:

- Fruit Logistica ([www.fruitlogistica.de](http://www.fruitlogistica.de)) in Berlin, Germany, is an international trade fair for fresh produce trade
- Biofach ([www.biofach.de](http://www.biofach.de)) in Nuremberg, Germany (for organic producers)

This survey was compiled for CBI by ProFound – Advisers In Development, in collaboration with CBI sector expert Piet Schotel

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