

Mango



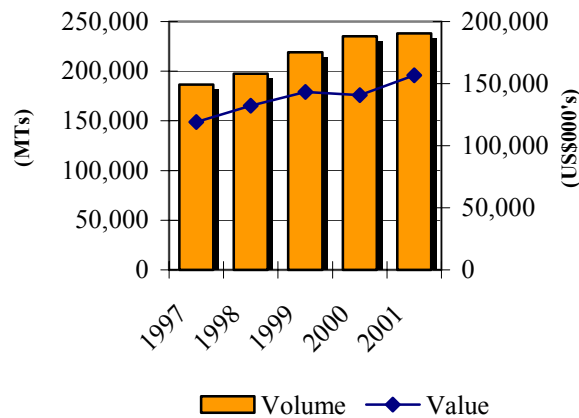
HILLSIDE
AGRICULTURAL
PROGRAM

Product Bulletin #1
2001 – 2002

Imports: Two factors have contributed to an increase in mango imports from the US in the past years: consumer awareness and product availability. Imports account for about 99 percent of total US domestic sales. In 2001, the US imported 237,953 MTs of mangoes (value estimated at \$156 million), marking an increase of less than 2 percent over 2000 volumes.

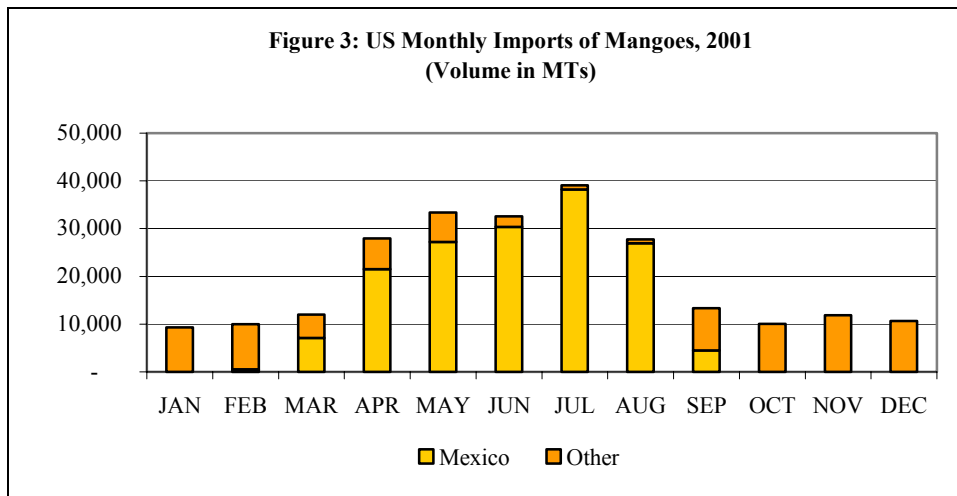
Market Share: Mexico remains the dominant supplier of mangoes to the US with 66 percent market share in 2001 a decrease of 19 percent from the previous year. Mexico's share has decreased marginally since 1997 primarily due to increased shipments from other suppliers like Brazil, Ecuador, and Peru during the Mexican off-season. However, Mexico's main advantage over

Figure 1: US Imports of Mango



Source: USITC

Figure 3: US Monthly Imports of Mangoes, 2001
(Volume in MTs)



these other suppliers is its proximity to the US. Panama and Haiti are also significant suppliers during the summer periods. Despite intense competition from Mexican mangoes, Haiti is able to compete by shipping mangoes directly to the East coast via Miami and New York. However, in 2001 Haiti's relative share

decreased by 4 percent. Brazil is the main supplier from mid-September through February. Other suppliers include Ecuador and Peru, both of which gained significant market share in 2001. Low volumes from Venezuela have been registered.

Seasonality: Nearly 70 percent of all mango imports arrived during the period April-August in 2001, a time when Mexico supplies the market with large volumes at low prices. Mexico's main competitors during the spring

This product bulletin was produced by Fintrac, Inc. under the auspices of the USAID-funded Haiti Hillside Agricultural Program (Contract # 521-C-00-00-00035-00)

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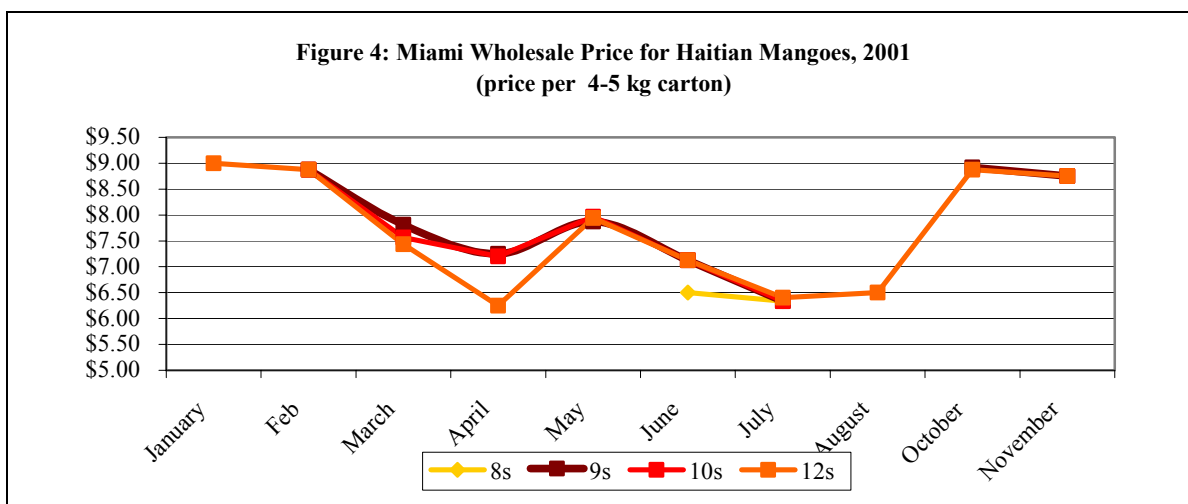
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are Guatemala and Haiti. Reliable supplies from Brazil, Peru, and Ecuador between September and March have made mangoes available on a year-round basis.

Prices: In the Los Angeles wholesale market, Mexican mangoes averaged between \$7-\$10 per carton from September to December. According to sources, Mexico is able to sustain lower prices and effectively dominate the market due to lower transport costs vis-à-vis competitors. Importers note that prices fluctuate greatly from year to year based on supply and weather conditions. Because of sporadic changes in the market, it is difficult to predict a trend in the prices of fresh mangoes. Miami is a major destination for mango imports from Central American and South American suppliers. However, buyers also report large quantities of mangoes being shipped to Miami by truck from Mexico via Texas and Arizona. Figure 4 and 5 provide a sampling of fresh Haitian Francis mango wholesale prices registered in the Miami terminal market. Prices for 2001 averaged between



Source: USDA/MN

\$6.00 - \$9.00 dollars per box for the Francis variety in Miami while it averaged between \$5.00-\$12.00 per box in New York. A small increase in prices is notable during the months of January-February and again during October through November reaching a maximum of \$12.00. According to the New York wholesale market, prices for the Haitian Francis tend to be more volatile. Prices ranged between \$5.00 and \$12.00 per box for the 2001 season. 9s, 10s, and 12s peaked at almost \$12.00 per box during the month of May while 8s peaked at \$12.00 per box in August. Shipments to the New York wholesale market were null during the months of September through November when Mexican mangoes offer more competitive prices and Haitian Francis production was minimal.

Trends: The majority of US consumers are largely unfamiliar with mangoes. It should also be noted that appearance, texture, and taste are also generally lower than what consumers in other markets would find and enjoy since most imported mangoes are treated with hot water in order to meet phytosanitary requirements.

Tommy Atkins remains a popular variety due to its red blush, despite it being fibrous and less sweet than others. Retailers attribute this to the tendency of consumers to select fruit based on appearance rather than taste; hence produce managers are reluctant to stock supermarket shelves with better-tasting but less attractive varieties. Of the major imported varieties, buyers note that Haden possesses superior taste but a limited shelf life relative to the Tommy Atkins and Kent varieties.

Some buyers believe that sweet, yellow-skinned varieties such as Mexico's Ataulfo mango may soon develop a following in the US. In addition to the large presence of poor quality varieties, the appearance, texture, and taste of mangoes found in the US are inferior to what consumers in other countries expect. Appearance is a major concern for suppliers who wish to be successful in the US market.