



Week N° 34

MANGO INDICATOR-2024

Period: 19th to 23RD August 2024

Pricing collected on the European markets

(In €/kg for air freighted mangoes - in €/box for sea or road transported mangoes)

	ORIGIN	VARIETY	SIZE	FRANCE		BELGIUM		NETHERLAND		GERMANY	
				Week 33	Week 34	Week 33	Week 34	Week 33	Week 34	Week 33	Week 34
Freight	Mexico	Kent	tt	7.50	6.50-7.50		7.00				
	Israel	Kent	tt	5.00-6.00	4.50-6.00		4.50				
Air	Israel	All varieties	tt	3.50-4.00	3.00-4.50	4.90-5.50					
	Egypt	All varieties	tt	3.00-4.00							
	Brazil	Kent	tt	6.00-7.00	5.50-6.00						
Sea	Brazil	TA	tt			5.00-6.00	4.00-5.25	6.00-6.50	5.00-5.50	6.00-7.00	5.00-6.00
	Brazil	Keitt	tt	6.00-7.00	5.00-7.00	5.00-6.50	4.00-6.50	4.50-6.00	4.00-5.50	6.00-7.00	5.00-6.00
	Brazil	Palmer	tt			5.00-6.00	4.00-5.25	4.50-6.00	4.00-5.50	6.00-7.00	5.00-6.00
	Dominican Rep	Keitt	tt	6.00-7.00	5.00-7.00	5.00-6.00	4.00-5.25	4.50-6.00	4.00-5.50	6.00-7.00	5.00-6.00
	Senegal	Kent	tt	5.50-6.00	5.50-7.00	5.50-6.75		5.50-6.50			
	Israel	Shelly	tt	8.80-10.00	8.80-10.00	8.00-9.00	8.00-8.50			8.00-9.00	8.00-8.50
	Israel	Kent	tt	6.50-7.50	7.50-8.50	8.00-9.00	8.00-8.50			8.00-9.00	8.00-8.50
	Israel	Omer/Kastury	tt	8.80-12.00	8.80-10.00	8.00-9.00	8.00-8.50			8.00-9.00	8.00-8.50
	Egypt	Keitt	tt								

Pricing indicated in the present note are market trends. In no case should they be viewed as specific sales price.

TA : Tommy Atkins, Had: haden, MR: Red Moon. Others varieties: Noa, Shelly, Lily, Omer/Kasturi * kg

VOLUMES

Estimation of arriving volumes.

(in tons for air-freighted mangoes and containers for sea-freighted fruits).

Freight	Origin	Week 32	Week 33	Week 33	Week 34	Freight
Air	Mexico	37	28	41		Tons
	Sto Domingo	4				
	Colombia	2				
	Senegal					
	Pakistan	19	17	5		
	Israel	138	42			
	Egypt	13	13	23		
	Indonesia	2				
	Brazil		17	17		
	Sea	Brazil	167	147	135	
Total Ctns		167	147	135		

These figures are given as an indication
Container 40' (approximately 20/22 tons per container)

GENERAL INFORMATION

The situation remains complicated on the European mango market. Faced with still sluggish demand, stocks continue to pile up and operators are unable to stem the fall in prices. Overall supply far exceeds the current level of demand. Several origins (Senegal, Dominican Republic, Israel and Egypt) are reaching the end of their campaign, which means that in September, Brazil should be the main origin present on the market, especially since the Osteen mango campaign of Spain promises to be extremely limited. The supply of Brazilian mangoes to the European market is down slightly this week but remains dynamic. Palmer's supply is decreasing and is positioned on average seasonal volumes. Keitt supplies are down slightly this week compared to the trend of recent weeks. To date, the threshold of 500 containers exported to Europe has not yet been crossed. It should be very soon. The current dynamic of volumes is comparable to the 2022 and 2023 campaigns (around 1850 containers). It is likely that the 2024 campaign will be lower than the 2021 and 2023 campaigns, the volumes of which were around 2,200 containers. Tommy Atkins deliveries are maintaining the low, steady volumes seen in previous weeks. Starting next week, deliveries to the North American market for this variety will be higher than supplies to the European market. This gap in favour of the North American market should continue until week 44.

This week's supply of Brazilian mangoes is made up of Palmer (50%), Keitt (40%) and Tommy Atkins (10%). A few packages of Kent were shipped to the European market this week.

MARKET COMMENTS

France: Activity on the mango "sea freight" market remains sluggish this week. Pending the end of the school vacations and the resumption of activity by several operators, demand for mangoes remains sluggish. The end of the campaign is complicated for the supply of Keitt

mangoes from the Dominican Republic, whose last batches are of very heterogeneous quality, with the above-mentioned prices valid for good quality batches. The last batches of Kent mangoes from Senegal should go on sale next week.

Very quiet activity this week on the mango “airfreight” market. The market continues to be dominated by Israeli supply, which remains as diversified as ever in terms of varieties. Weak global demand has led to a drop in the price of Kent mangoes from Mexico, which are finding it a little harder to sell this week. Sales of Kent mangoes from Brazil are also difficult. End of campaign for Kent mangoes from Israel.

Netherlands: Slowed activity on the mango market, especially at the start of the week, when many operators have returned from vacation and in the Southern Region of the country, the start of the school year has taken place. The weakness of demand does not facilitate the absorption of stocks which remain quite high. At the end of the week, even if the market seems more active, prices remain quite low, particularly for the Keitt offer (from Brazil and the Dominican Republic) which is having more difficulty selling. The drop in prices is less pronounced for the less available supply of Tommy Atkins.

Germany: Complicated situation on the mango market. Demand remains sluggish, despite the implementation of some small promotional operations (1€/piece). The drop in prices is more marked for South American fruits than for Israeli fruits, whose prices are still managing to hold up.

Belgium: No change on the mango market, which again this week is at a standstill. Interest in mangoes is more than lukewarm, and as a result sales, which are taking place in dribs and drabs, are unable to prevent substantial stocks from building up. At the end of the week, the market is overloaded with fruits of all origins and in all sizes and price trends are very wide and vary depending on the volumes held by the operators. A number of sales are even being made at open prices, without succeeding in freeing up stocks. Promotional offers continue but have no real effect on demand. The Brazilian offer is mainly composed of large-calibre fruit. A difficult end to the campaign for Keitt mangoes from the Dominican Republic. The prices mentioned above apply to good quality lots, with other lots offered at open prices. The offer of mangoes from Israel, although diversified (Omer, Kent and Keitt), is attracting very little interest.

Sales also calm on the mango “airfreight” market. The supply is mainly dominated by Mexico and Israel.

TRENDS

