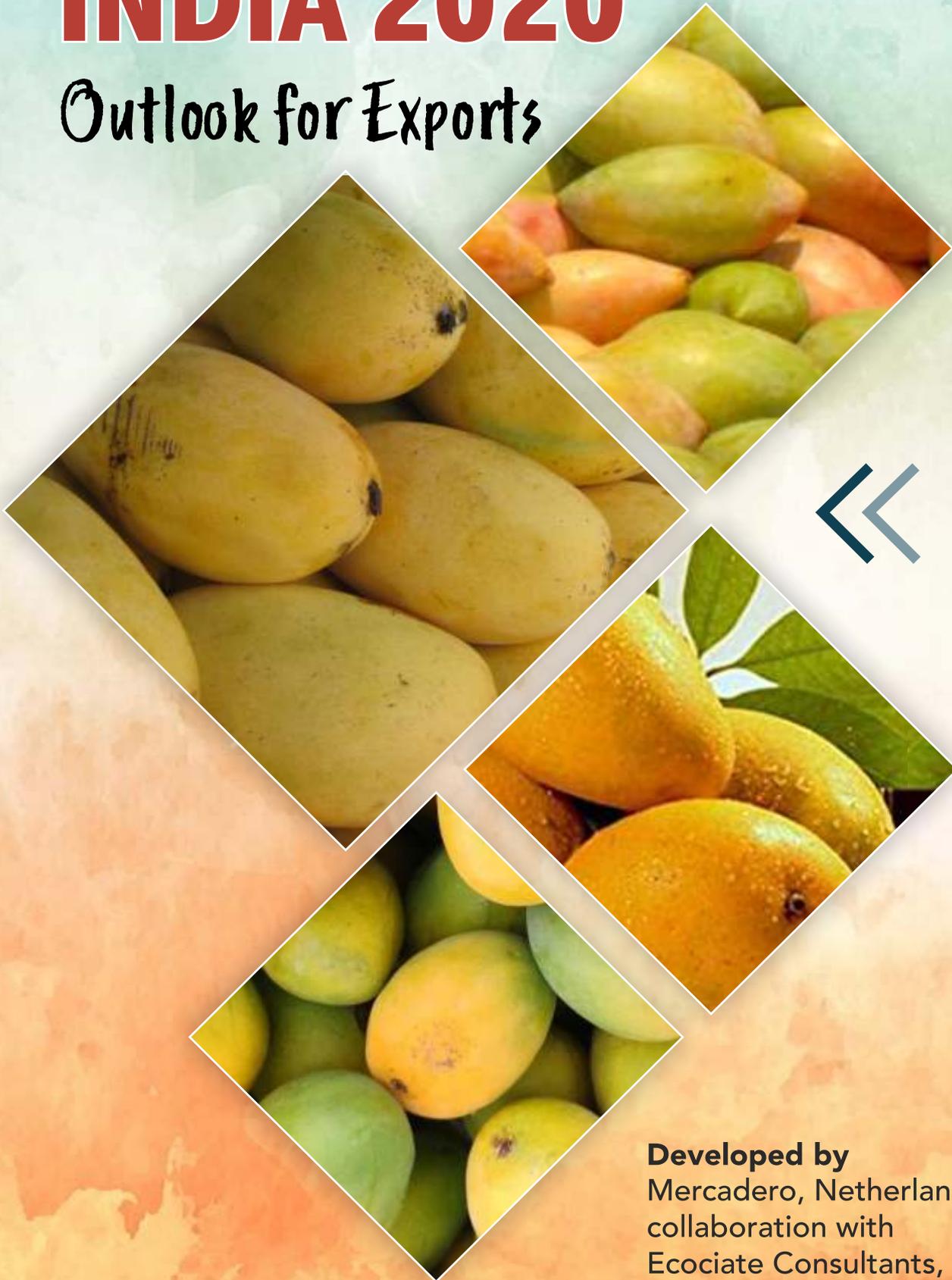


Update: 15th June 2020

MANGO SEASON OF INDIA 2020

Outlook for Exports

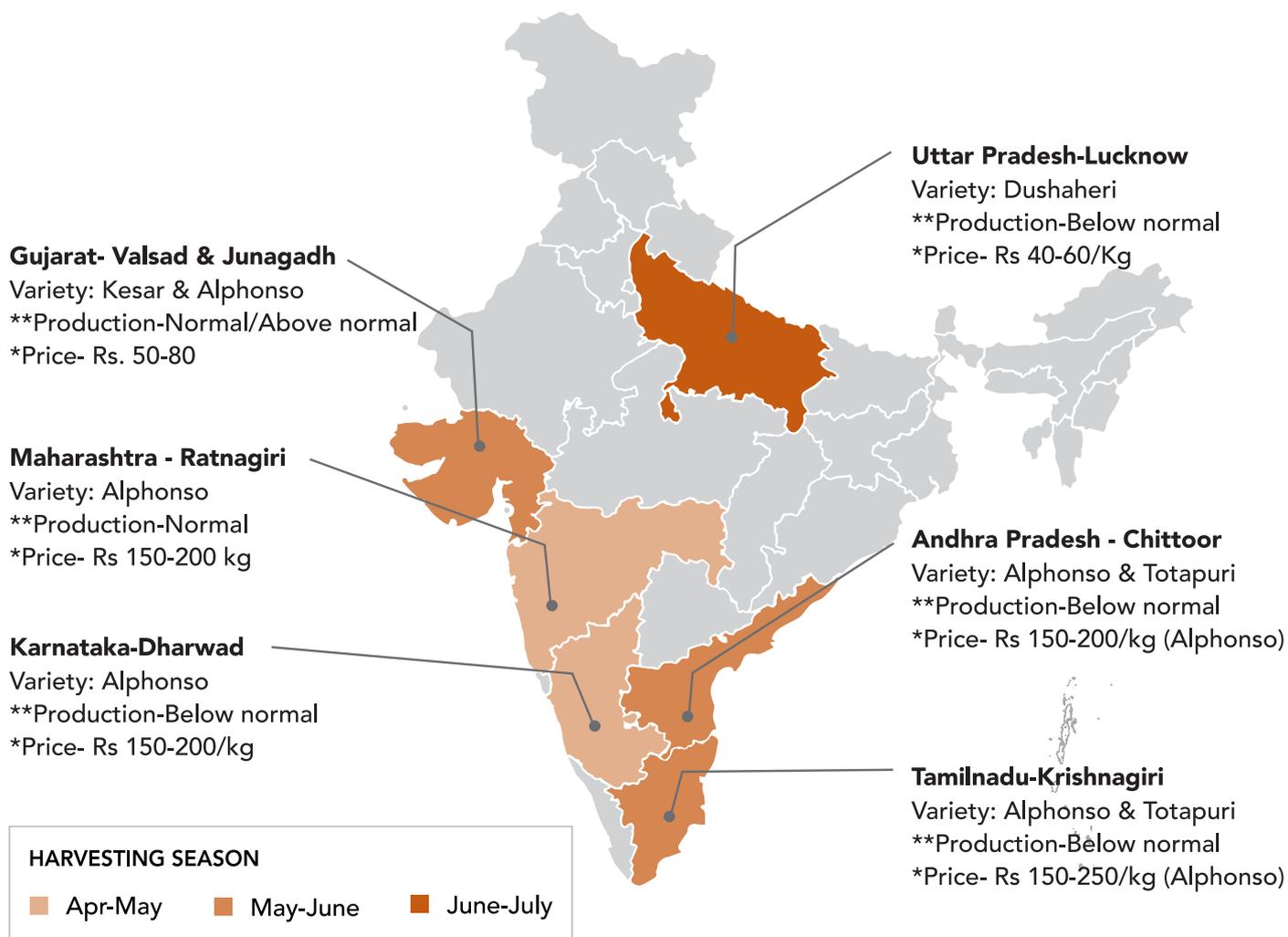


Developed by
Mercaderero, Netherlands in
collaboration with
Ecociate Consultants, India

India has exported around 48.5 Thousand MT of fresh mangoes worth 55.39 Million \$ and around 66.7 Thousand MT of mango pulp worth 62.87 Million \$ within 3 quarters (April to December) of 2019. The previous year (2018-19) saw an export of around 49.2 Thousand MT of fresh mangoes and over 105 Thousand MT of mango pulp (Source: APEDA). While majority of the fresh mango exports are routed to Middle Eastern countries, European and Western markets import more of mango pulp from India. The Middle Eastern countries contribute of around 70% of the total mango exports.

Due to late monsoon and relatively cold weather in January, flowering was late across India this year. This resulted in late start of the mango season for almost all varieties by more than two weeks and will result (most probably) in a shorter season this year.

Overview of Mango Season in India (Year 2020)



*Prices mentioned in the above diagram are the average farmgate prices of Grade 'A' fresh mangoes obtained from various stakeholders. Market prices may vary at different layers in supply chain.

** The production and yield expectation of mangoes in this report are based on the 5-point scale below which is assumed on the basis of media reports, various stakeholder interviews and are reviewed by scientific experts of IIHR and CISH:

	Alphonso	Totapuri	Kesar	Dashehari
Description	Average yield estimate in Kgs from 20-25 years old tree in normal agronomic and weather circumstances.			
Poor	<30	<40	<30	<50
Below normal	30-50	40-100	30-60	50-80
Normal	50-70	100-120	60-80	80-120
Above normal	70-90	120-180	80-120	120-160
High	>90	>180	>120	>160

Corona virus (COVID-19) pandemic impact for farmers:

- Government regulated markets (*Mandis*) for Mango were closed in April and May and major pre-harvest contractors and traders were out of business or their traditional channels of intermediaries were disrupted. This resulted in a differentiated picture for farmers.
- Farmers who were fully dependent on the traditional channels, suffered losses with less demand and limited contractors visiting their orchards and thus low prices.
- Farmers, mostly larger farmers, that found alternative channels such as direct sales to consumers in metro-cities, supermarkets or traders who managed to work outside the *Mandis*, did get a good price for their volume. These shorter chains resulted in a competitive consumer price and still a good farmgate price for the farmer.

The overall Mango season has been analysed across 4 major varieties in the following section:



ALPHONSO

PRODUCTION AND HARVESTING



- Production in Ratnagiri & Devgad in Maharashtra and Valsad in Gujarat has been normal to above normal this year, along with good yield of Grade 'A' mangoes. The production and availability in Dharwad in Karnataka, Chittoor in Andhra Pradesh and particularly Krishnagiri and Dharmapuri in Tamil Nadu have been below normal this year due to poor rainfall in last 2 years.
- In Ratnagiri (Maharashtra) season started in 2nd week of April and lasted till 1st week of June. In Krishnagiri (Tamil Nadu) season started in 3rd week of April and is expected to last till 2nd week of June.

QUALITY AND PRICE



- Quality this year is expected to have higher brix, smooth skin and better pulp colour due to less water content in fruit and minimal pest infestation.
- Prices have been higher this year for both 'A' Grade and 'B' Grade Mango. While per kilogram prices in domestic market for 'A' Grade Mango was in range of Rs 150-250 for 'B' and 'C' Grade mango it was in the range of Rs 40-50. This was 40-60% higher this year for Grades B and C which may have significant impact on pulp making.

PROCESSING AND EXPORTS



- Harvest for pulping only started in May in Maharashtra, Karnataka and South region and is expected to finish by end of June.
- Fresh exports season was short and limited due many cancelled flights, disruptions in the supply chain services and skyrocketing airfreight prices in COVID-19 lockdown situation.
- Higher domestic prices result in better margins for fresh sales and less volume available for pulping.

TOTAPURI

PRODUCTION AND HARVESTING



- The south Indian region of Chittoor in Andhra Pradesh and Krishnagiri in Tamil Nadu has seen delayed harvesting by a week or two this year. The season is expected to last till July instead of August in a good fruiting year.
- Yield is expected to be lower than normal, particularly from Tamil Nadu due to poor rainfall last year.

QUALITY AND PRICE



- Majority of the pulp making industries process Totapuri which has the best pulp recovery rate.
- Farmgate prices for pulp grade mango are higher this year; up to Rs. 15-25 per kg instead of Rs. 5-10 in a normal year. pulp prices were prevailing at advance orders of Rs 45 per kg locally in Chittoor (AP)

PROCESSING AND EXPORTS



- Harvest for pulping is expected to start from mid-June and prices will open by mid-August in the domestic market.
- Around 25% of the small-scale pulp making units are not operational in Chittoor and Krishnagiri area this year and several operational units are operating at the reduced capacity. Lockdown measures implemented to prevent spread of Covid-19 has led to the shortage of labour and disrupted existing supply chain systems of processors from both supply and demand side. In such a scenario several small processors kept their processing units closed instead of taking risk.

KESAR

PRODUCTION AND HARVESTING



- Gujarat (Valsad and Saurashtra region) is the major producer of Kesar in India. There is little seasonal impact on production of Kesar this year. Harvesting had started in early May and expected to last till mid-June.
- Yield is expected to be normal or higher than normal this year in Gujarat.

QUALITY AND PRICE



- Farmgate prices are in the same range as they were last year.
- Prices are in range of Rs 50 -80 per kg based on grade of produce.

PROCESSING AND EXPORTS



- Many Valsad based pulp processing units could not operate during the start of the season due to limited availability of labour and other lockdown measures.

DASHEHARI

PRODUCTION AND HARVESTING



- Lucknow and surrounding areas of Uttar Pradesh are the major production centres of Dashehari in India. The season is delayed by almost 2 weeks. Starting in June, the season is expected to last till mid-July.
- Availability is expected to be 25-30% less than normal due to late monsoon last year and an elongated winter period at the start of the year which caused late flowering. Unexpected rains and hailstorms in March-May period further damaged the crop and made yields highly variable in Uttar Pradesh.

QUALITY AND PRICE



- Prices are 20-25% higher than last year in local markets. However, the full season for ripe mango is yet to start.

PROCESSING AND EXPORTS



- Unlike other years, this time due to the lockdown, very few traders from Maharashtra and other states procured mangoes directly from orchards in Uttar Pradesh for processing.

Following table summarizes the region wise mango season in India for year 2020

State	District growing belt	Varieties	Yield expectation	Harvest season period expectation
Maharashtra	Ratnagiri, Devgad	Alphonso	Normal to above normal	2 weeks late/shorter
West Karnataka	Dharwad	Alphonso	Below normal	2 weeks late/shorter
Tamil Nadu	Krishnagiri, Dharmapuri	Alphonso	Below normal	2 weeks late/shorter
Andhra Pradesh	Chittoor	Alphonso	Below normal	2 weeks late/shorter
Gujarat	Junagadh, Valsad	Alphonso	Normal	2 weeks late/shorter
Tamil Nadu	Krishnagiri, Dharmapuri	Totapuri	Below normal	2 weeks late/shorter
Andhra Pradesh	Chittoor	Totapuri	Below normal	2 weeks late/shorter
Uttar Pradesh	Malihabad, Lucknow	Dashehari	Below normal to normal, highly variable	2 weeks late/shorter
Gujarat	Junagadh, Valsad	Kesar	Normal to above normal	2 weeks late/shorter

Corona virus (COVID-19) pandemic impact on exports:

- Since international flights were largely restricted due to the pandemic, flight and shipping prices were extremely high for fresh mango exports, and thus fresh exports have been very limited.
- In a large country like India the domestic market has great influence on the export outlook. The current high mango prices and various COVID-19 related complications have resulted for many, especially small pulping facilities, to refrain from pulping this year.
- Especially smaller and relatively new traders and companies do not focus on fresh or pulp exports this year, but instead focus on the domestic markets. Only the larger and longer established facilities are operational and maintain their focus on exports.
- The over-capacity in pulping facilities that developed over the last 10 to 15 years also resulted in some facilities to stop operations last few years.



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Source of Information:

This report was prepared with the help of information provided by Swad Canning industries from Ratnagiri (Maharashtra), Dhandekar Alphonso Mangos from Ratnagiri (Maharashtra), Quinzee Agro, Kaveripattnam from Krishnagiri (Tamilnadu), A.K. Traders from Krishnagiri (Tamilnadu), Bharath Agro Food Products from Chittoor (Andhra Pradesh), Mukesh Bhai Farms from Valsad (Gujarat), Kasis Dua Mango Trader from Uttar Pradesh and Azadpur (Delhi), Om Shankar Dwivedi Mango farmer from Malihabad (Uttar Pradesh), Phalada Agro from Bangalore (Karnataka), ChaiNMassala, Fresh mango Exporters from Devgad (Maharashtra), ABC Fruit from Krishnagiri (Tamilnadu), Mother India Farms (Tamilnadu), Indian Institute Horticultural Research (IIHR) at Bangalore (Karnataka) and Central Institute of Sub-tropical Horticulture (CISH) at Lucknow (Uttar Pradesh) among many others.