MARKET STATISTICS FOR MANGO

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This is a graphical presentation of market information that is available for mangos. Statistics are presented for Hawaii, the U.S. market, and some foreign markets. Two points are highlighted: first, it is difficult to get good market statistics for mango, and second, a pattern emerging from the available data is the tendency to import mangos from nearby producers.

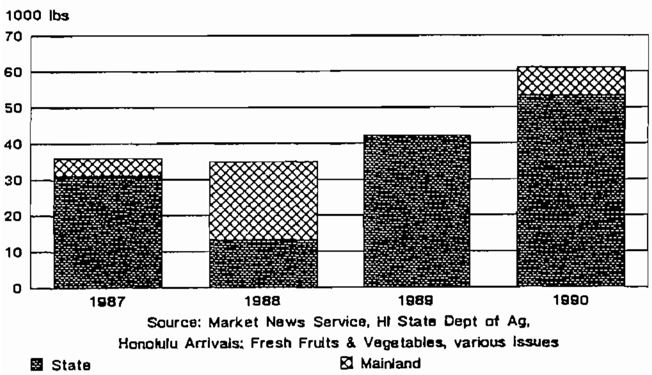

Figure 1. Arrivals of mango in Honolulu, 1987-1990.

Most of the mango consumed in Hawaii comes from backyards of friends and family. Very little passes through the marketplace, and even less through wholesale markets. Figure 1 shows the volume reported by Honolulu wholesalers for recent years. In 1990, these arrivals were a little more than 60,000 pounds. No arrivals were reported for 1991 and 1992. Depending on the year, the amount coming from the U.S. mainland varies. Prices wholesalers charge their customers typically fall in the 35-45¢/lb range, and as for timing, mangos are available during mango season. This is June to October, but especially July and August.

There is not much more information from Hawaii. Figures 2a and 2b help point out why. In Figure 2a, again looking at unloads, we see how mango compares to some other fruits. Figure 2b puts this in even better perspective. The relative size of mango unloads compared to other fruits and vegetables makes it difficult to gather data continuously, especially with the limited resources to do the work.

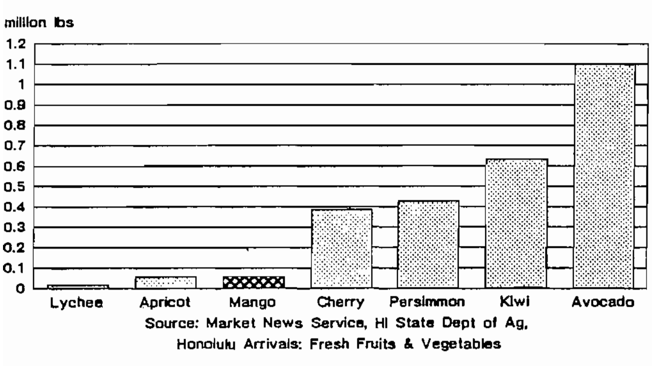

Figure 2a. 1990 Honolulu unloads: Relative importance of selected fruits.

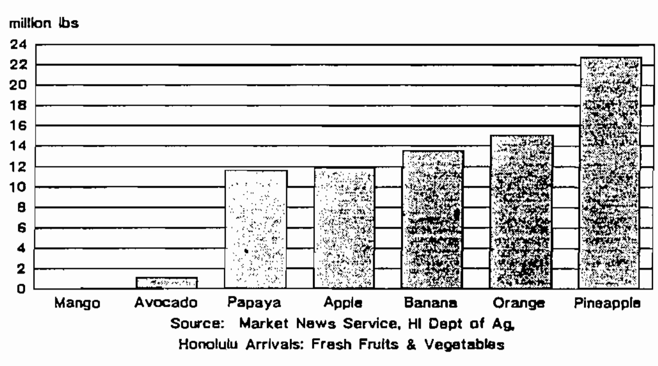

Figure 2b. 1990 Honolulu unloads: Relative importance of selected fruits.

Moving on to the U.S. market: in Figure 4, we see fresh mango imports in the past decade. Notice that from 1989 mangos are combined with guavas and mangosteens. This reflects data problems at the national level (guava producers are also unhappy about the data being aggregated). Note that in Figure 4: (1) data are for only fresh product (203 million lb in 1991); there were also imports of puree (23 million lb), frozen product (0.9 million lbs. and dried product (0.5 million lb); and (2) statistics are for imports. Other U.S. states (notably Florida and California) also produce mangos.

The largest supplier of fresh imports to the U.S. is Mexico (Figure 5). In Figure 6, the prices for Mexican imports follow a consistent pattern. They start high in the beginning of the season, then decline as supplies increase and other fruits come into season.

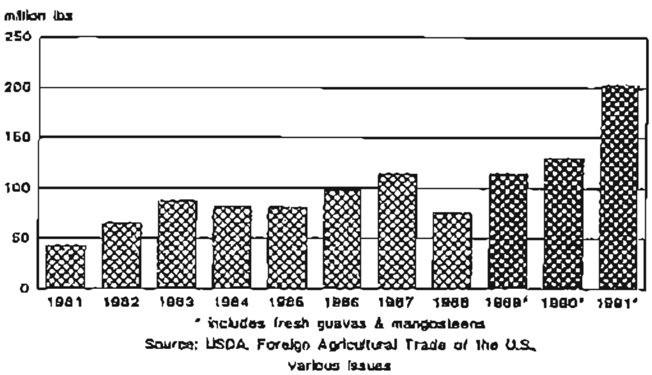

Figure 3. U.S. imports of fresh mangos, 1981-1991.

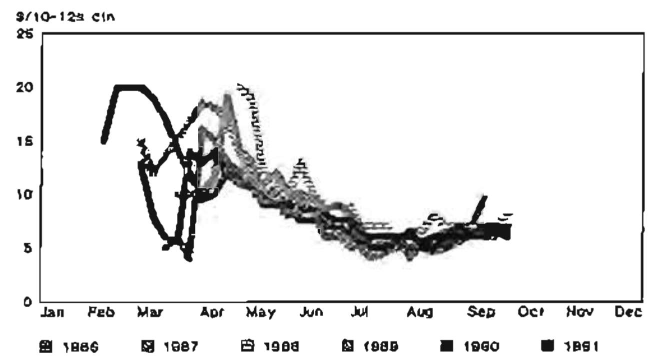

Figure 5. Weekly wholesale price for Mexican mangos in Los Angeles.

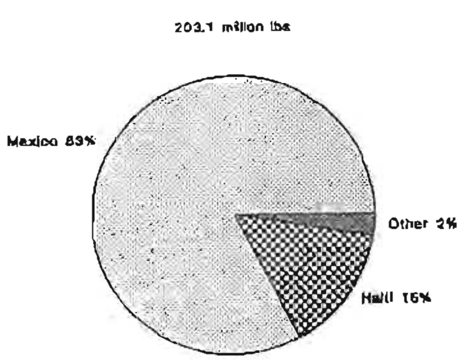

Figure 4. U.S. imports of fresh mangos, guavas, and mangosteens by major suppliers, 1991.

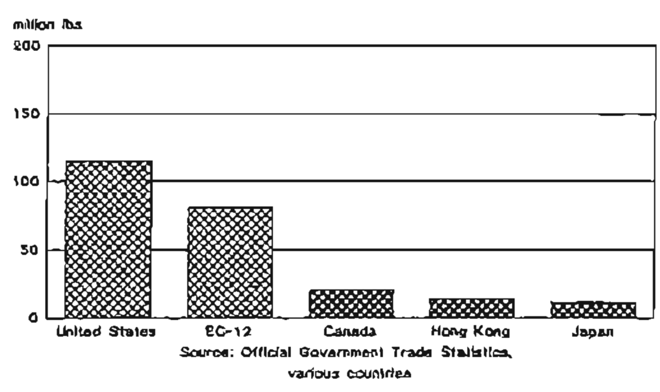

Figure 6. Selected import markets for mango, 1989.

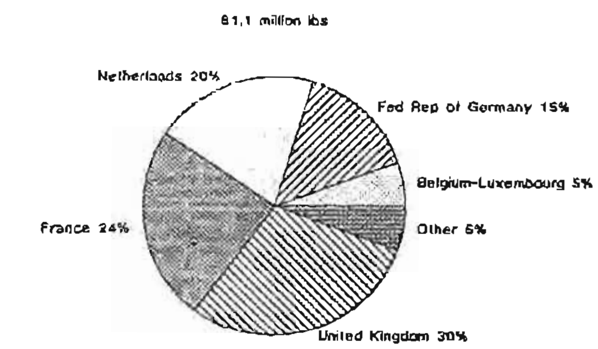

Figure 7. EC-12 imports of fresh and dried mango, guava, and mangosteen by major importers, 1989.

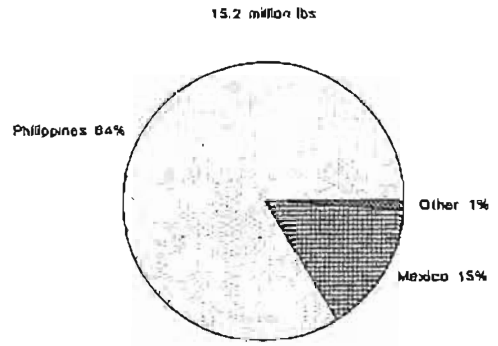

Figure 10. Japan imports of fresh mangos by major suppliers, 1991.

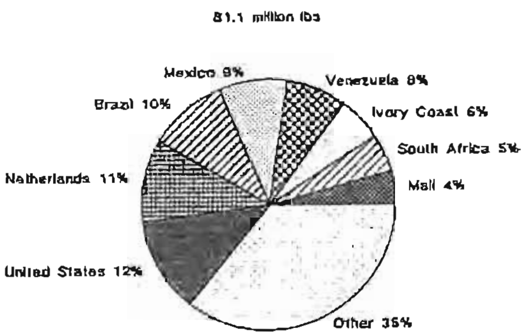

Figure 8. EC-12 imports of fresh and dried mango, guava, and mangosteen by major suppliers, 1989.

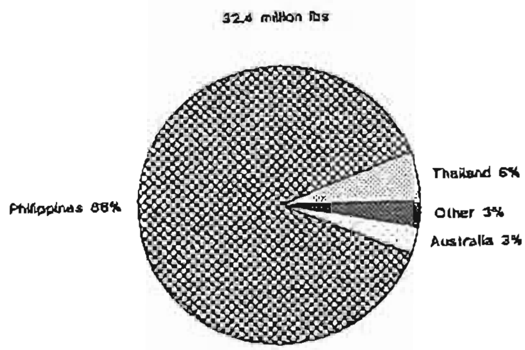

Figure 11. Hong Kong imports of fresh mangos by major suppliers, 1991.

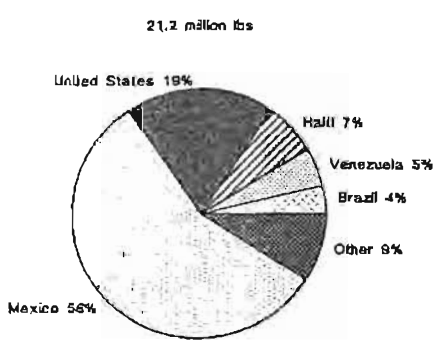

Figure 9. Canandian imports of fresh mangos, guavas, and mangosteens by major suppliers, 1990.

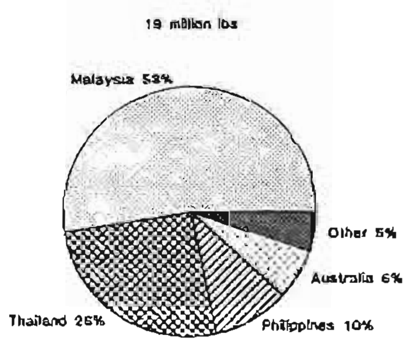

Figure 12. Singapore imports of fresh and dried avocado, mango, guava, and mangosteen by major suppliers, 1991.

Figure 7 compares mango imports for the most recent year, 1989, where data are available for all the countries being considered. A mix of products is being compared. Canada, Hong Kong, and Japan report fresh mango. The U.S. figure is for fresh mango, but includes guava and mangosteen. The EC-12 figure is for fresh and dried mangos, guavas, and mangosteen.

The U.S. is probably still the largest importer. U.S. imports have grown from around the 120 million lbs. reported in Figure 7 to over 200 million lbs. in 1991. The European Community as a group is second, with 81 million lbs. Figure 8 gives a further breakdown of Europe by country. Immigration is one reason for mango's popularity in many countries, so the major importers reflect populations that come from mango producing areas. The Netherlands has a large share because it re-exports product.

The role of the Netherlands is evident in Figure 9, which divides the European pie according to supplier. There is no dominant supplier, and a lot of smaller suppliers make up the 35% "Other". For 1989, the U.S. had the largest share with about 10 million lbs.

Similar to the U.S. case, Mexico is the largest supplier to the Canadian market (Figure 10). The U.S. share is about 4 million lbs. of the 21 million lb. total.

Moving across the Pacific, Japan's market is dominated by the Philippines with Mexico also having a large share (Figure 11). Hong Kong (32 million lbs.) imported twice as much as Japan (15 million lbs.), in part because Hong Kong is a major re-exporter (Figure 12). Again, the Philippines is the main source, with Thailand and Australia also having shares.

At first glance, market shares seem quite different in Singapore, but Figure 13 includes many other products. This leads back to one of our conclusions: it is difficult to get data on mango market and the data that is available often includes other products. With this in mind, the major observation from the information presented here is that markets seem to be supplied by neighboring producers. So, the Philippines is a major supplier for Japan and Hong Kong, and Mexico is dominant in North America. Europe seems to have no close neighbors who grow mango, so is supplied by many countries. This applies even in Hawaii, where backyards and neighbors provide the fruit.

Q: I noticed that mango imports to Hawaii are very small compared to many other fruits that are imported. Does year-round availability of fruits such as apples, bananas, and pineapples influence the overall size of the market for a fruit in Hawaii?

A: I think the bigger impact on the amount of mango imports is that so many people in Hawaii have dooryard mango trees.

Q: What about the tourist market for mangos? Shouldn't that be tremendous?

A: It could be large, but we get our data from the wholesalers and not from the end users, so we don't know how much is sold to hotels and restaurants.

Q: Papayas started out as a backyard crop, but now they have a marketing order, which has made a major difference.

A: The structure of the market and the organization of the people involved does contribute.

Q: Do you think that organizing the mango growers in Hawaii into some kind of cohesive unit would help the industry develop?

A: Producers typically don't have the same amount of influence as the buyers; producers are much smaller. So organizing is one of the ways that producers can deal more effectively in the market.