

The European market potential for mango puree

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In the long term, the European market for mango puree is expected to undergo gradual expansion. This growth is likely to be driven by an increasing population of health-conscious consumers [in Europe](#), who opt for products that make them feel good, both mentally and physically. In addition, the increasing use of mango puree instead of mango fruits in food products is helping to boost the import of mango puree in Europe. Many players in the food and beverage industries are exploring the use of mango puree in their products (e.g. in [fruit-based yoghurt and beverages](#)). Other products include dairy fruit preparations, pastry fillings, beverages and baby food. The Netherlands, the United Kingdom, Germany, France, Spain and Portugal offer opportunities for suppliers from developing countries.

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1. Product description

Mango puree is obtained by disintegrating and sieving the edible portion of ripe mango fruits (*Mangifera indica*). The terms pulp and puree are sometimes used interchangeably.

Mango puree can be produced without removing the water (single-strength puree) or by physically removing part of its water content (concentrated mango puree). Mango purees are traded as a product that can be kept at room temperature (in aseptic packaging) or frozen.

Mango purees are used primarily as an ingredient in the beverage industry (to produce juices and smoothies), but also in the baby food industry and in the jam, bakery and confectionery industries. Smaller quantities of mango purees are also sold as final products.

The world's largest producer of mango puree is India, which accounts for around 75% of all global production. Other important producers include Mexico, Ecuador, Brazil, Guatemala, Cuba, Peru, Costa Rica, Pakistan, Vietnam and South Africa. Although many varieties of mango are used for processing into purees, the leading ones are the Indian varieties Alphonso, Totapuri and Kesar. Famous varieties used for pulping in Central and South America include Tommy Atkins, Del Ica, Magdalena and Kent.

This study covers general information regarding the market for mango puree in Europe that could be of interest to producers in developing countries.

It is not possible to compile precise trade statistics for analysing the European trade in mango puree, as there is no official statistical code. The closest code that can give some insight into the trade of mango puree is 20089948: 'Guavas, mangoes, mangosteens, papaws "papayas", tamarinds, cashew apples, lychees, jackfruit,

apodilla plums, passion fruit, carambola and pitahaya, prepared or preserved, not containing added spirit but containing added sugar, in immediate packaging of a net content >1 kg'. As the description shows, this code also includes other products.

Figure 1: Mango puree



Source: [Unsplash](#)

2. What makes Europe an interesting market for mango puree?

Europe accounts for around 40% of the world's mango puree imports. Mango puree imports have increased in volume by an estimated yearly average of 7%. Virtually all imports from outside Europe come from developing countries.

Exact data about quantities of mango puree imported into Europe are not available, due to the lack of precision in international trade statistics. According to several industry and statistical sources, however, imports of all forms of mango puree to Europe in 2019 were estimated at around 100,000 tonnes. A volume of around 70,000–80,000 tonnes of imported mango puree consists of concentrated mango puree, with 25,000–35,000 tonnes consisting of single-strength mango puree.

In the next five years, the European market for mango puree is likely to increase at an annual growth rate of 5–7%. The main reasons for the expected market growth are the increased usage of mango puree in food and beverage products, along with the popularity of mango as a flavour. Mangoes are also being increasingly used by fruit-preparation producers to make ingredients for drinks (smoothies and functional beverages), the dairy industry (yoghurts) and the bakery industry (as a filling). Mango puree is also very popular as a baby food. One of the newer, trendy applications of mango puree is in the production of fruit bar snacks. Mango fruit bars are produced in several ways, including the dehydration of mango puree.

Source: Eurostat, national statistics and industry estimations

Note: The figure above represents the estimated import shares of mango puree based on industry sources and available statistics by India (as the largest European supplier). Exact data about imports by country are not available. These data represent imports from developing countries, and they do not reflect internal European trade. At the time of writing this study, no additional information was available.

3. Which European countries offer most opportunities for mango puree?

As Europe's main importer of mango puree, the Netherlands is an interesting focus market. Because the Netherlands re-exports most of the quantities imported, it is also important to explore opportunities in high-consumption markets, such as the United Kingdom, Germany, France, Spain and Portugal.

The Netherlands: Europe's largest importer of mango puree

The Netherlands is Europe's largest importer of mango puree. In 2019, roughly 40,000 tonnes of mango puree were exported to the Netherlands. Most of those imports (up to 80%) consisted of concentrated mango puree.

Around 80% of all imported mango puree is said to be re-exported to other destinations (primarily to Germany and France), while the remaining 20% is consumed domestically. This means that the Netherlands is a relatively small market.

India is the largest supplier of mango puree to the Netherlands, with an estimated market share of over 70%, followed by Mexico, Colombia and Brazil. In the past five years, Brazil has apparently been the fastest-growing developing-country supplier, with an estimated annual growth rate of 14% in exports to the Netherlands. The share of Brazilian suppliers is nevertheless still very small (approximately 5%).

The majority share of imported puree is traded by large Dutch beverage industry suppliers, including [SVZ](#) (with facilities in the USA, Poland, Belgium and Spain) and [Prodalim](#) (with processing facilities in Brazil, Vietnam, Mexico and Poland). Other traders include [Verbruggen Juice Trading](#), [Fruitlife](#), [Global Fruit](#) and [Santos Enterprise Food](#).

Mango is a very popular ingredient for Dutch producers of mixed-flavour juices. These juices are usually labelled with names like '*Tropisch/Tropical*', '*Exotisch/Exotic*' or '*Multivitamine/Multivitamin*', and most contain some proportion of mango puree. Juice-blending companies mix mango puree with other ingredients to create exotic combinations that are appealing to consumers. Other fruits used in these mixes include pineapple, melon and passion fruit. The retail market share of mixed-flavour juices in the Netherlands is the highest in Europe (45%) with mango as a frequently-used ingredient.

The leading juice-blending and bottling company in the Netherlands (using mango puree in flavour combinations) is [Riedel](#). Other juice producers and mango puree users include [Vrumona](#) (part of the Heineken group), [Infra](#), [Mogumogu](#) and [Fruity Line](#). Finally, the Netherlands is also home to Europe's largest producer of soft drinks and fruit juices, [Refresco](#).

One of the main market trends is a decrease in the consumption of fruit juices and an increase in the consumption of low-calorie ('light') soft drinks. Mango puree is one of the most popular flavours in these types of drinks, as well as in energy drinks, iced teas and mineral waters with added fruit juices. The smoothie production segment has seen particularly high growth in use, as mango puree adds sweetness, thickness and smoothness to final products.

Imports of organic mango puree into the Netherlands are also increasing, specifically boosted by increased demand from the baby food industry. Some Dutch companies, such as [Ariza](#), are specialized suppliers to users of organic mango puree, including baby food producers. Dutch baby food brands using mango puree in their products include [Nutricia](#) (with the 'Olvarit' brand) and [De Kleine Keuken](#).

Tip:

Stay abreast of the fruit juice market in the Netherlands by contacting the [Dutch Association for soft drinks, mineral water and juices](#) (Dutch language site).

Reach out to [potential fruit puree importers](#) from the Netherlands to find out their needs and expectations.

The United Kingdom: a smoothie lover

The United Kingdom is the second-largest importer of mango puree in Europe. There are [180 active mango puree buyers](#) in the United Kingdom, accounting for almost 3,000 shipments. The United Kingdom imports slightly more concentrated mango puree than it does single-strength puree, as compared to other European countries. This can be explained by the large-scale use of single-strength purees in ready-to eat-products (e.g. canned mango pulp).

Although exact data about the shares of the leading suppliers are not known, the market structure is estimated to resemble that of other markets, with India being the largest supplier. The United Kingdom also imports significant quantities of mango puree from the Netherlands and Germany (as transit countries), as well as from Dutch and German fruit-processing and warehouse facilities established in other European countries (mostly Poland).

[In the United Kingdom](#), mango puree is widely used in fruit juices, smoothies, dressings, ice cream and desserts. The leading importers and suppliers of mango puree in the United Kingdom include [Cobell](#), [Kiril Mischeff](#), [David Berryman](#), [Uren](#), [Fuerst Day Lawson](#), [Döhler UK](#) and [Billington Food Ingredients](#). The leading smoothie brand is [Innocent](#) (owned by Coca Cola), followed by [Naked](#), and the leading brand of fruit juice is [Tropicana](#) (owned by PepsiCo). In the category of baby food, the largest user of organic mango puree is [Ella's Kitchen](#).

The consumption of smoothies is the main driver of the increased demand for mangoes in the United Kingdom. According to the [European Fruit Juice Association](#), the United Kingdom is the largest European market for smoothies. In the United Kingdom, [smoothies](#) have become a choice for many people who are looking for a tasty and convenient way to obtain the recommended daily consumption goal of five servings of fruit and vegetables, which is being promoted to reduce the risk of certain health problems (such as heart disease). In 2021, [sales of juice and smoothie bars in the United Kingdom](#) (PDF) amounted to around \$54.4 million, reflecting a 28.6% recovery from the pandemic slump in 2020. In 2022, Euromonitor forecasts further recovery to almost \$77.9 million, with an anticipated CAGR growth of 13.1% through 2025.

Tips:

Learn more about the market for fruit juices in the United Kingdom by visiting the website of the [British Soft Drink Association](#).

Study major suppliers of fruit puree to the United Kingdom (such as [Kiril Mischeff](#)), to learn what competitors are offering.

Germany: fond of organic mango puree

Germany is said to import around 10,000 tonnes of mango puree from non-European countries, mostly from India. The German market is much larger, however, and at least 5,000 tonnes more are imported from the Netherlands (as a transit country).

The largest quantities of mango puree are used by a variety of German fruit juice and smoothie companies. As a flavour, mango is very popular in exotic fruit drinks, and many new product launches are including mango puree

as an ingredient. The smoothie industry in Germany, which has the second-highest number of smoothie consumers in Europe ([following the United Kingdom](#)), is an especially significant user of mango puree. One third of all smoothies sold in the country were private-label, with the remainder being brand names. The international brand [Innocent](#) is one of the leading brands, but there is also a significant local production. One of the most innovative companies is [TrueFruits](#), which uses mango puree in several types of products. From 2021 to 2027, [the smoothie market in Germany](#) is expected to expand at a CAGR of around 5%.

Germany is also one of Europe's leading markets for organic products, and it is [the largest market for healthy beverages](#) in the region. In 2021, German consumers spent \$15.7 billion (+5.8%) on organic food and beverages. This creates opportunities for suppliers from developing countries that offer organic mango puree. The baby food industry is a large user of organic mango puree in Germany, led by one of the foremost organic baby food pioneering companies, [Hipp](#). The leading organic food brands [Alnatura](#) and [dm-Bio](#) have also launched several products with mango puree as an ingredient, including baby food, curries, yoghurts and sorbets. Some of these companies (such as Hipp) support [direct sourcing from organic suppliers](#) (PDF) from developing countries.

Leading importers and industry suppliers of mango puree in Germany include [Döhler](#), [Binder International](#), [Carrière](#) and [Pijahn](#), as well as Austrian companies with facilities in Germany ([Agrana](#) and [Grünewald](#)). In the German fruit juice industry, mango puree is used primarily in juice blends ('multivitamin juices'). Most fruit juices (with mango puree as an ingredient) are sold under brands of retail chains (private labels), with [Refresco](#) as the leading developer and packer of fruit juices. Although Refresco's headquarters are in the Netherlands, Germany is one of its key markets.

Tips:

Find German traders of fruit puree in the [German company directory - Wer liefert was](#).

Stay abreast of the German fruit juice industry by visiting the website of the [Association of German Fruit Juice Industry](#) (in German only).

Stay informed about developments in the German baby food sector by consulting the [German Special Nutrition Association](#).

France: mango puree as a comfort food

Around half of all mango puree imported to France is sourced from India, followed by the Netherlands and Germany (as transit countries). The largest user of mango puree in France is the fruit juice industry, which is one of the most important [markets for juices in Europe](#). Consumption of mango puree is dominated by mixed-flavour fruit juices, such as [Joker](#) or [Tropicana](#), the two most popular juice and smoothie [brands](#) in France. Although the consumption of smoothies in France is increasing, it is smaller than in Germany or the United Kingdom.

More specifically, in France, mango puree is increasingly being sold as an ingredient in soft sweets/comfort foods, such as mousses, spoonable fruit yoghurts, panna cotta and puddings. In addition, several producers offer mango purees as a final product. Examples include [Valade Group](#), [Ethiquable](#), [Capfruit](#), [Ponthier](#) and [Léa Nature Group](#). Many of these companies source mango puree directly from suppliers in developing countries.

Tip:

Find French traders of mango puree on online trading platforms, such as [Go4WorldBusiness](#).

Spain: a preference for mango puree from Mexico

The structure of the market for mango puree in Spain is different from other European markets, as it is one of the rare countries for which India is not the leading supplier. It is estimated that at least one third of all mango puree is imported from Mexico, followed by India, Brazil and Colombia.

In addition, Spain has its own [mango production area](#), with an area of about 5,000 hectares, mainly in the [Malaga](#) region, with a yield of 15,000 tonnes per hectare. The varieties available from Spain are Osteen, Kent, Keitt and Tommy Atkins.

Mango purees are used primarily by the fruit juice and nectars industry, with [Don Simon](#) and [Juver](#) (part of Conserve Italia) as the leading brands. Like in other European countries, mango puree is used in several different market segments (such as smoothies, yoghurt and ice cream). One special characteristic of the Spanish market is the use of the mango puree in 'salsa' type dips. Products include [Montosa](#) and [Hacendado](#) (private label of the Mercadona retail chain).

Tip:

Keep track of the use of mango puree in the juice market by visiting the website of the National Association of Manufacturers of Juices and Gazpachos ([ASOZUMOS](#)).

Portugal: a true mango juice lover

Portugal imports most of its mango puree [from India](#). The share of other suppliers is very small, with Vietnam as the only growing developing country, although quantities remain small. Juices containing mango puree as an ingredient are also imported from the South African beverage company [Ceres](#).

Portugal may be Europe's largest per capita consumer of mango puree, and it has a strong preference for mango flavour in fruit drinks. In fact, the Portuguese are credited with bringing mangoes from India to Europe in [the 15th century](#). Most of the mango puree imported into Portugal is used by the fruit juice and nectar industry.

The leading users of mango puree in Portugal are fruit juice bottlers and blenders, with [Compal](#), [Ceres](#) and [Um Bongo](#) as the leading brands. Mango puree is also sold as a final product by producers including [Panegara](#). The Portuguese smoothies segment is developing as a user of mango puree, with such innovative companies as [GL](#) (smoothies brand [Sonatural](#)).

Tips:

See our study on [Market Statistics & Outlook for Processed Fruit and Vegetables](#) for more information on general trade developments within the European processed fruit and vegetables sector.

Consult relevant trade statistics using various tools, such as ITC [TradeMap](#) or [Trade Helpdesk](#).

4. Which trends offer opportunities on the European mango puree market?

The growing interest in mango puree in Europe is driven primarily by the increasing popularity of healthy beverages (e.g. yoghurts, smoothies and juices) and the increasing popularity of mango as an exotic flavour, combined with the increasing demand from the food-processing industry.

To find out more about general trends, read our study about [Trends on the European Processed Fruit and Vegetables Market](#).

Increased demand for healthy beverages

The demand for more health-conscious drinks in [Europe](#) is growing. Consumers are increasingly looking for drinks with nutritional benefits, fewer calories and less sugar. These drinks must also taste good. They prefer beverages with [natural ingredients](#), rather than artificial flavours. Mango puree is a popular ingredient in the region's fruit juice industry.

Smoothies are a relatively new type of drink. They can be defined as a blended fruit puree with a thick, smooth texture, often with added milk, yoghurt or fruit juice. Smoothies have become a very popular option for breakfast in Europe, or as a kind of healthy liquid snack between main meals. Home-prepared smoothies are usually made by blending fresh or frozen fruit and vegetables with the addition of water, fruit juice or milk. In contrast, the smoothie-processing industry typically uses fruit purees as the most common ingredients. The fruit purees give the drinks their typical thickness and smooth texture.

Mango puree is very popular for adding sweetness and the preferred thick texture to smoothies. Most mango-type smoothies are prepared by blending mango puree with other fruit purees (e.g. banana, apple, passion fruit and orange). Smoothies with mango puree are becoming increasingly popular drinks in restaurants, cafés and juice bars. To supply the food-service industry and at-home consumers with more convenient products, some companies have launched frozen packs of single servings of frozen mango puree. The German company [Acai](#) is one example.

Mango as a popular flavour

Mango is a very popular flavour, especially among younger consumers. According to Innova Market Insight, global product launches incorporating mango flavours have increased by 240% in the past ten years. In addition to being nutritionally rich, mango provides unique flavour, taste, fragrance and health-promoting qualities.

Mangoes/mango puree offer several health benefits, including the prevention of [cancer](#), heart disease, high [cholesterol](#) and [high blood pressure](#), in addition to being [beneficial to digestion](#), eye health and immunity. Mango puree has a high amount of vitamin A, vitamin C, potassium, protein and fibre. It also enhances skin health due to the presence of carotenoids. Mango is often labelled as a super fruit.

Mango puree is used in many products, including ready-to-eat breakfast bowls (with cereals, yoghurt and mango-peach puree), mango ice cream enriched with passion fruit and chia seeds, Brazilian mango fruit spread with tonka bean, mango sweet and sour sauce, and vegan mango yoghurt with coconut milk. It is also frequently used in combination with coconut water as a flavour enhancer.

One good example of a developing country supplier offering 100% mango-based juice with enhanced natural mango flavour is the Egyptian company [El Nile Growth](#). These kinds of 100% mango juices are still not very common on the European market.

Organic mango puree

Organic mango puree is increasingly being used by the baby food industry. Traditionally, banana puree was the most commonly used type of fruit puree in infant food. Currently, however, producers are trying to diversify

their flavour offerings, and they are increasingly using new flavours (e.g. mango puree). Because of its pleasant taste, mango puree is also mixed with vegetable purees to improve the overall taste and make it more appealing to babies.

One interesting example of a supplier of organic mango purees from a developing country is the Peruvian company [Frutosa](#). This private venture is supported by several associates, including the Pronatur growers collective, which supplies organic fruit for the production of purees. Frutosa successfully entered the European market in partnership with French aromatic and fruit ingredients supplier [Astier Demarest](#).

One example of European success with added-value products using organic mango puree is the German company [Cosmoveda](#), which has partnered with producers in Sri Lanka.

Other market segments (e.g. the smoothie and fruit juice industries) are also increasingly using organic mango purees.

Tips:

Suggest new product developments to your buyers, including smoothie combinations or new flavours. European producers of smoothies are constantly looking for innovations to increase their sales or to distinguish themselves from competitors.

Read the [CBI Market Statistics and Outlook for Processed Fruit & Vegetables](#) to learn more about the general trade trends and the size of specific market segments.

Visit the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe relevant to mango purees are [SIAL](#) (France, even-numbered years in October), [ANUGA](#) (Germany, odd-numbered years in October) and [BioFach](#) (Germany; organic products, every year in February).

This study was carried out on behalf of CBI by [Autentika Global](#) and updated by [M-Brain](#).

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