



National Mango Board
2020 Frozen Mango Market Assessment – Executive Research Summary

The National Mango Board (NMB) contracted with Thomas J. Payne Market Development to perform a market assessment for frozen mangos in the US food industry. This assessment was designed to be a practical exercise and a road map to assist the NMB in exploring current and future market development activities. For this project Payne interviewed suppliers of mangos in the US as well as food processors using or with the potential to use of mangos. Payne investigated mango formats and gathered product data through a variety of reputable sources to identify the current market and opportunities.

Executive Summary

The US food industry is in a state of continual change with many ingredients competing for space. Garnering acceptance requires understanding what drives the market, reaching key decisionmakers and encouraging opportunities for awareness, interest, trial and acceptance. The following areas were covered.

- **Definitions.** A search of global food science databases identified thousands of mango citations. Around the world researchers are working on processing improvements, especially in the frozen value chain. This indicates interest and effort to steer mangos into usage categories beyond the frozen polybag. There are frozen mangos for ingredients, freeze-dried for chunks and powders and even essence for natural cosmetics. Although there is a lot of emphasis and interest, industry professionals know that all of the ingredient categories are reliant on fresh which synergistically drives the demand of all sorts of mango uses!
- **Demand.** In the US and abroad, new trends come along and drive the ingredient market. According to sellers and users interviewed, mangos are hot! The fruit continues to maintain popularity as a consumer-desirable ingredient. Mangos have the whole package: health, beauty, unique flavor and texture, and are also inherent to Asian and Latin food businesses.
- **Functionality.** Frozen mangos are a unique fruit with multiple varieties and characteristics. For frozen mango, firmness and brix are important characteristics, and buyers look for a homogeneous product with consistent size at specified flavor and BRIX levels. Although varieties and origin are of extreme interest in the initial phases of the value chain, end users are looking for case-to-case, container-to-container and package-to-package product consistency. Although frozen was the focus for this assessment, we looked at the entire universe of mango ingredients which impact mango use in the food ingredient sector.
- **Product Development.** The typical US grocery store has 30,000 items, with 2,500 new products per month launched. Mango new products continue each year with more than 377 individual items in 50 +categories in 2020. Frozen mangos in the primal state of diced and frozen are common with new brands and combinations launched monthly. Mango purees (aseptic packed) are utilized in innovative sauces and toppings. A new trend is seen towards usage



of frozen fruit-based preparations to provide fruit identity and texture. With the development of further processed mango items such as freeze dried, microwave dried and others, mangos are important ingredients in the non-frozen and liquid categories.

- **Trade Structure.** Frozen mangos are delivered and distributed in the US in a very unique and integrated hybrid value chain. It has gone well beyond the initial imported fruit channels and is fully integrated now with specialty frozen fruit and vegetable importers and distributors. Century old, traditional fruit companies balance their core business with mango imports. A decade ago, mango was a small item, but now it rivals berry offerings. New channels for further processing are an emerging area, with products such as freeze-dried, micro-dried and others that are capable of significant volume usage (*i.e.*, it takes 11 kg of frozen to make 1 kg dry). Fruit preparations as well as jams and jellies in the US are important ingredients for dairy, confectionery and other areas, and end users are beginning to purchase more primal cuts (mango halves) for production in the US.
- **Supply Chain Analysis.** Frozen mangos are in demand in the supply chain. For frozen polybag fruit and smoothie businesses, there are regular channels and only a limited amount of freezer space in grocery chains and foodservice channels. In monitoring distressed merchandise suppliers, we observe at times periodic loads of frozen-chunks. These typically are scooped up by fruit prep and further processors. The fruit prep, jam, preserve and sauce producers are an ideal area or “safety-valve” for frozen fruit surplus.
- **Opportunities.** All forms of mangos—fresh, processed, further processed and further-further processed—play important functions in the overall health of the mango business. Fresh mangos benefit from the presence of mango products in the marketplace. With the rising Hispanic and Asian populations in the US, mangos and mango products are a comfort food. For mango novices, the consumption of mango-containing products can be a first step in becoming regular mango purchasers. Marketing ideas are presented for market development in the food industry that could benefit the mission of the National Mango Board and help keep usage and market momentum.

To view the complete report, send your request to foodservice@mango.org.