Food and Agriculture Organization of the United Nations

MAJOR TROPICAL FRUITS

Market review 2020

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NOTE ON METHODOLOGY

Data and information in this publication were compiled from communications with national sources and industry partners in trading countries, monthly data from TDM and COMTRADE and secondary information and data from desk research.

Detailed tables on global trade in major tropical fruits as well as further information on data sources and any deviations from the underlying methodology can be found in the *Major Tropical Fruits Statistical Compendium 2020*.

All data in this report should be considered as provisional.

FOREWORD

This report is issued on an annual basis to the Members and Observers of the Sub-Group on Tropical Fruits of the Intergovernmental Group on Bananas and Tropical Fruits, which is a subsidiary body of the Committee on Commodity Problems (CCP). It is prepared by the Team on Responsible Global Value Chains, Markets and Trade Division, FAO, Rome, and the tables contained bring together the information available to FAO, supplemented by data obtained from other sources in particular with regard to preliminary estimates.

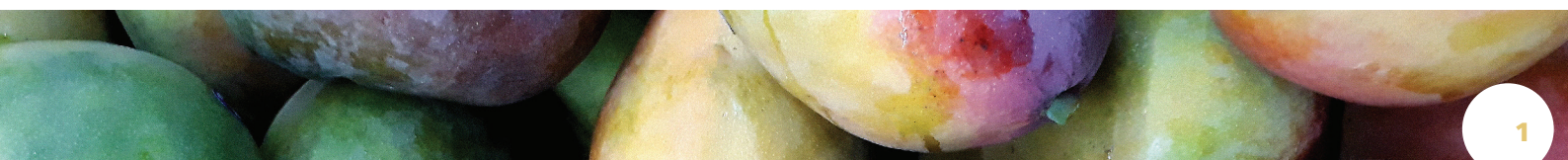
The Team on Responsible Global Value Chains provides research and analyses on global value chains for agricultural commodities, and economic data and analyses on tropical fruits. Regular publications include market reviews, outlook appraisals and projections for bananas and tropical fruits. The team also provides assistance to developing countries in designing and implementing national policies regarding responsible business conduct in agricultural value chains.

The report is available at the following FAO webpage:
www.fao.org/economic/est/est-commodities/tropical-fruits/en/

2020 DEVELOPMENTS AT A GLANCE

- Available data and information suggest that aggregate global trade in the four major tropical fruits proved overall more resilient to the impact of the COVID-19 pandemic than earlier anticipated.
- Full year data show that aggregate world trade in the major tropical fruits expanded by 3.6 percent in 2020, reaching a record volume of USD 9.6 billion in constant 2014-2016 dollar terms.
- Export growth was underpinned by ample global supplies from the main production zones, with the exception of pineapples, whose exports seem to have been adversely impacted by the COVID-19 pandemic.
- Although aggregate exports were stronger than expected in view of the challenges created by the pandemic, performances varied markedly across commodities.
- Reports and information received from industry sources suggest that the pandemic and related containment measures caused disruptions to some supply chains and constrained import demand, hampering in particular exports from Central America. It is likely that these disruptions contributed to the relatively low growth of shipments for some commodities, compared with the rapid growth observed in previous years, and to the decline in pineapple exports as indicated below.
- Developments by commodity:
  - Global exports of mangoes, guavas and mangosteens rose to 2.2 million tonnes in 2020, an increase of 2.9 percent from 2019.
  - Global pineapple exports decreased to 3.1 million tonnes in 2020, corresponding to a 7.9 percent fall from 2019.
  - Global exports of avocados grew to approximately 2.3 million tonnes in 2020, an increase of 8.2 percent from 2019.
  - Global exports of papayas rose to approximately 353 000 tonnes in 2020, a rise of 2.7 percent from 2019.
- World average export unit values rose in 2020, with the exception of avocados, whose world export unit values averaged 5.7 percent below their 2019 level as global supplies outstripped import demand.

This note defines major tropical fruits as pineapple, avocado, papaya and the commodity cluster composed of mango, mangosteen and guava.



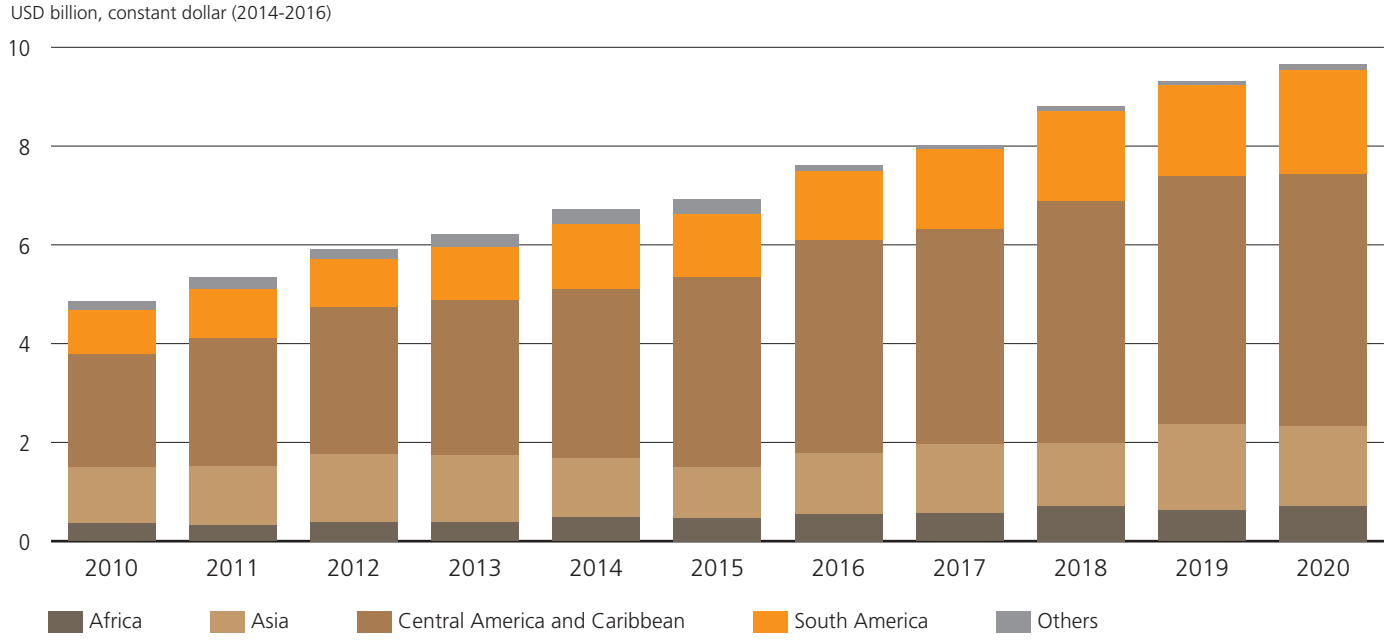
Overview

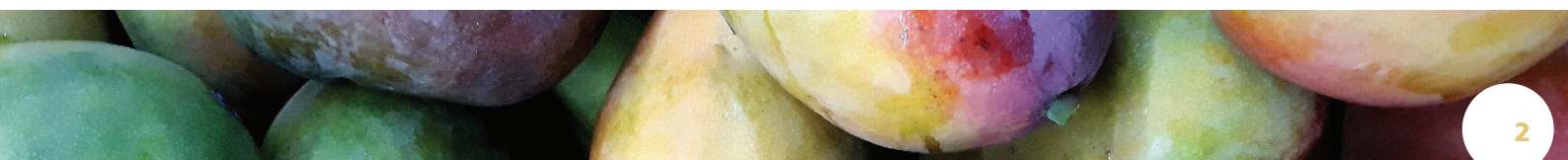
This report examines full year information on developments in major tropical fruit global trade in 2020 and represents an update to the Major Tropical Fruits Preliminary Market Results 2020, issued earlier. The data on trade quantities presented in this report were compiled from the following sources: country responses to the 2021 questionnaire of the FAO Intergovernmental Sub-Group on Tropical Fruits; data from the UN Comtrade database as well as from the Trade Data Monitor; and secondary data and information from desk research. The findings incorporate revised data and information as available up to the end of June 2021. FAO is continuously monitoring global trade flows of major tropical fruits and will update these results should revisions of officially reported data be released.

Presently available data indicate that, despite the negative effects of COVID-19 and its related mitigation measures on labour, supply chains and incomes globally, the overall volume of world trade in major tropical fruits in 2020 grew to a record of USD 9.6 billion in constant 2014-2016 dollar terms, marking an expansion of approximately 3.6 percent from 2019 (Fig. 1). This positive performance, aside from pineapples, was underpinned by abundant supplies from the major production zones, which had invested in production expansion in response to burgeoning global demand and lucrative export opportunities in previous years. However, despite a generally sustained availability of produce for export markets in 2020, temporary as well as longer-lasting disruptions to supply chains and contractions in demand were widely reported, which particularly hampered exports from Central America. The dramatic reduction in international air traffic, for example, significantly impeded shipments of mangoes and papayas to the European Union, while the lockdown-induced closures of the hospitality sector reduced demand for pineapples in both the United States of America and the European Union, the two main importers.[1] On the other hand, in retail markets, consumers displayed a higher propensity to spend on nutrient-rich foods perceived to support the immune system. This particularly supported the demand for

[1] *See for example: www.freshplaza.com/article/9201157/overview-global-impact-of-coronavirus/*

Figure 1 - Major Tropical Fruits Global aggregate export volumes

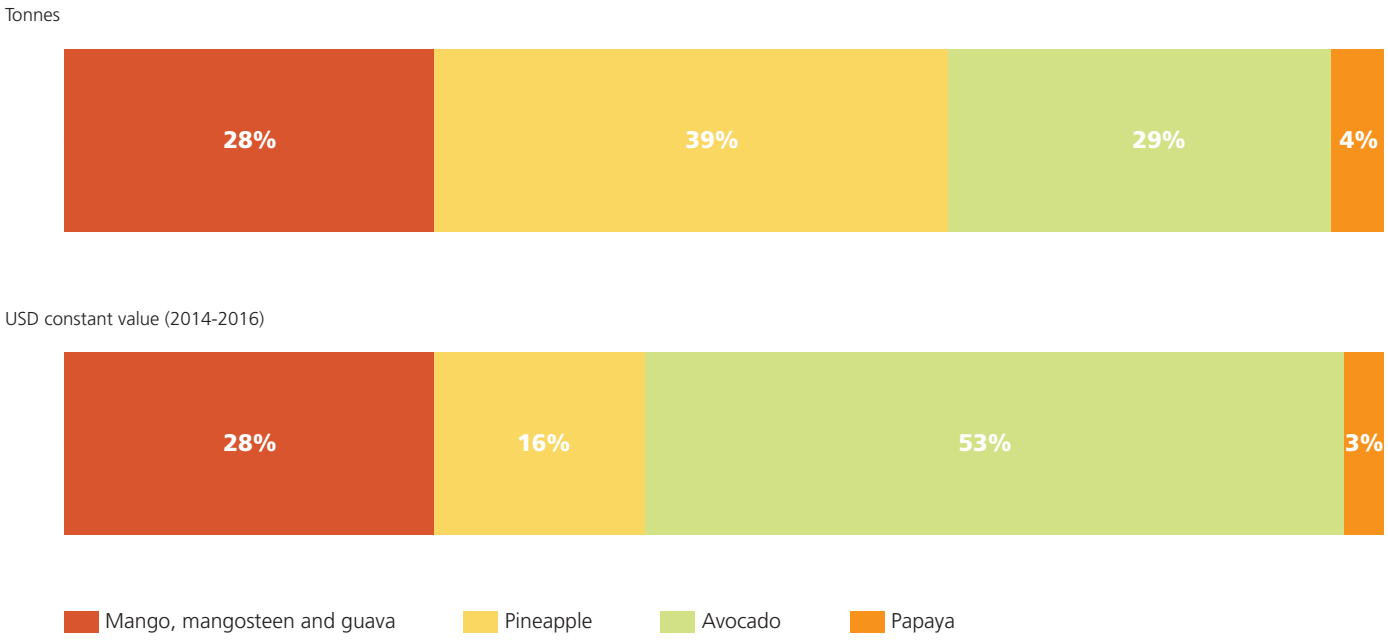


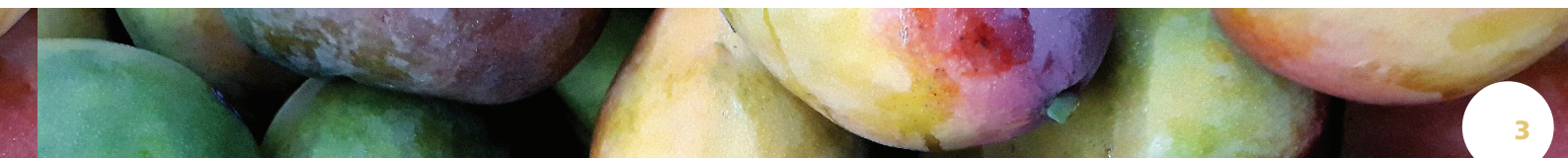


avocados, whose global exports reached a peak in 2020 despite all difficulties, although sales might have been even higher in the absence of COVID-19-related constraints on supply chains, the hospitality sector and incomes.

Globally, pineapple, avocado and mango continued to be the three most traded tropical fruits in terms of their export quantities in 2020, bananas aside (Fig. 2). With global exports of approximately 3.1 million tonnes, pineapples remained by far the predominant commodity in quantity, with their popularity in world trade primarily driven by the fruit's extremely low average export unit values. However, in value terms, avocados accounted for over 50 percent of global trade in major tropical fruits in 2020 (Fig. 2), on account of the significantly higher average export unit value of this fruit, which is typically a multiple of the average export unit value of pineapples (Fig. 3). The commodity cluster mango, mangosteen and guava accounted for approximately 29 percent of global major tropical fruit trade in both quantity and constant value terms in 2020. At an export quantity of only 353 000 tonnes, papayas continued to play only a marginal role in international markets. A major obstacle to a significant expansion in global papaya trade, outside of its main destination of the United States, remains the fruit's high perishability and sensitivity in transport, which renders Central and South American produce less suitable for supply to far afield destinations, including the European Union.

Figure 2 - Major tropical fruits - Share of 2020 export quantities and volumes by type



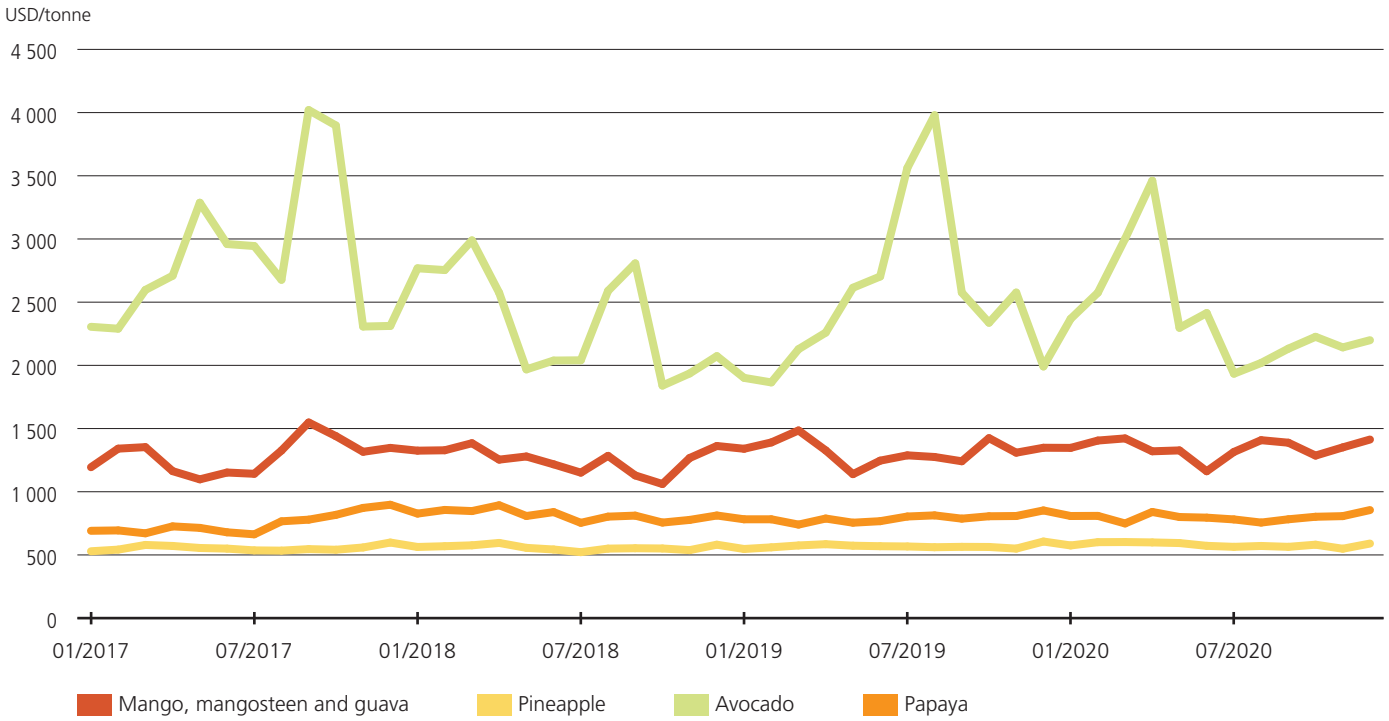


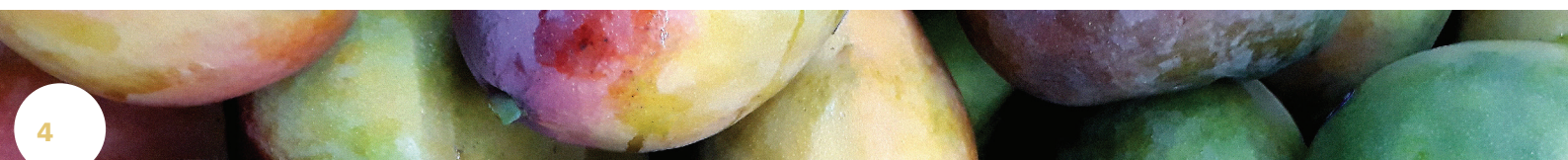
Prices

World average export unit values[2] of all four major tropical fruits continued to reflect closely their respective supply and demand conditions. Most distinctly, average unit values of avocados rose by 46% between January and April 2020 due to temporary supply shortages in the major exporter Mexico, peaking at USD 3 400 per tonne in April 2020, but fell back due to increasing supplies thereafter. Over the full year, average unit values of avocados ranged 5.7 percent below their 2019 average, at USD 2 397 per tonne in 2020. World average export unit values for mangoes, meanwhile, continued to follow largely their regular seasonal variations throughout the year, but on average ranged 2 percent higher in 2020 than in the previous year as a result of robust demand, in particular in the United States, most notably during the second half of the year. Average export unit values of pineapples rose slightly, by 2 percent on average compared to 2019, as COVID-19-related disruptions to supplies from Costa Rica and the Philippines, the two leading global exporters, counterbalanced reduced import demand by the United States, the European Union and China. Average export unit values of papayas displayed a slight tendency to rise on account of the positive demand situation in the United States, the main importer of papayas.

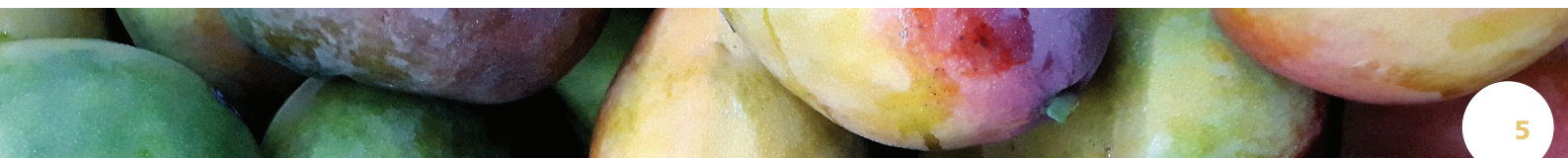
[2] *Calculated as the weighted average export unit values of world shipments of the respective commodities. Indicative export unit values are illustrative of market behaviour only and do not represent actual prices, which are determined in spot or futures markets.*

Figure 3 - Major tropical fruits World average export unit values (January 2017 to December 2020)





MAJOR TROPICAL FRUITS



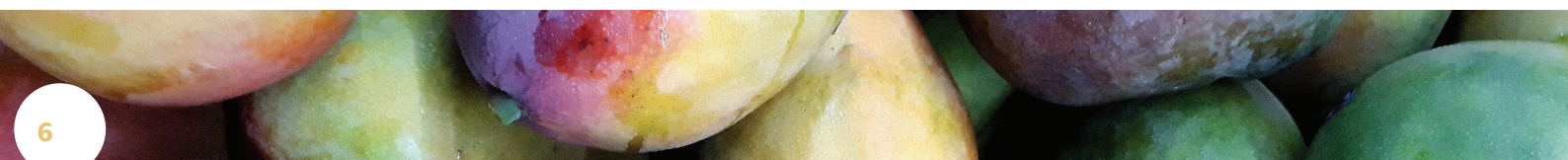
Commodity Briefs

Mango, mangosteen and guava[3]

Global exports of mangoes, guavas and mangosteens rose to approximately 2.2 million tonnes in 2020, an increase of 2.9 percent, or some 60 000 tonnes, from 2019. This places exports of this commodity cluster as the second fastest growing group among the major tropical fruits in 2020, behind avocados. The main driver was a 15.7 percent expansion in exports from South American suppliers, which reached some 550 000 tonnes in 2020. In terms of export quantities by type, mangoes continued to account for close to 90 percent of global shipments. Favourable production conditions in Brazil and Peru resulted in increased supplies, which facilitated growth in exports of 12.7 percent and 19.2 percent for these countries, respectively (Fig. 4). Exports from Mexico, the leading supplier of mangoes globally, meanwhile registered a 13.3-percent growth in 2020, to reach 465 000 tonnes – an equivalent of 21 percent of total global traded quantities. All three suppliers – Brazil, Peru and Mexico – exported higher quantities at reduced prices to the United States, which reported an 11.2-percent yearly expansion in imports in 2020. On average, close to 90 percent of Mexican mango exports are destined to the United States, with the remainder shipped predominantly to Canada. Shipments from Brazil and Peru, meanwhile, are primarily destined to the European Union markets, with only some 20 to 30 percent of exports from both countries reaching the United States. In the European Union, Brazil benefits from its ability to produce mangoes perennially, including a number of varieties such as Tommy Atkins, Keitt and Kent that are popular in key European import markets. With a total reported export quantity of some 240 000 tonnes each, Brazil and Peru each accounted for approximately 11 percent of global mango, mangosteen and guava exports in 2020. Exports from Thailand, meanwhile, fell by a reported 18.4 percent on account of COVID-19-related supply chain disruptions affecting shipments to China, the main recipient of Thai mangosteens. With an average export unit value of USD 1 700 per tonne for shipments from Thailand to China in 2020 – approximately 30 percent higher than in 2019 – mangosteens are the most expensive fruit of this commodity cluster traded at the global level. The considerable decrease in mangosteen shipments from Thailand to China, which registered fast growth in 2019 on account of ample Chinese import demand, hindered further trade expansion for this fruit in 2020. As previously, guavas continued to display a low presence in import markets, in particular due to its lower suitability for transport.

Available data indicate a total global import quantity of fresh mangoes, mangosteens and guavas of 2 million tonnes in 2020, an increase of 6.5 percent from 2019. This expansion was mainly due to higher imports by the United States, the largest global importer of mangoes, mangosteens and guavas. Following an 11.2-percent growth from 2019, imports by the United States reached 545 000 tonnes in 2020, the equivalent of 27 percent of total global imports. Despite the COVID-19-related difficulties experienced by the United States, industry sources reported higher consumer demand for mangoes, in particular organic types, in line with a generally higher nutritional awareness of the assumed health benefits of these fruits. Purchases by China, the second leading global importer of mangoes, mangosteens and guavas, remained relatively stable at just below 380 000 tonnes in 2020 (some 78 percent of which consisted of mangosteens), equivalent to 19 percent of global imports. Given the supply chain disruptions experienced by exports of mangosteens from Thailand, the major supplier of the fruit to world markets, Chinese imports of mangosteens recorded a decrease of 19 percent in 2020, to 294 000 tonnes. At the same time, the country increased imports of mangoes from Viet Nam, whose sea route from Ho Chi Minh port remained largely unaffected by COVID-19

[3] *International commodity classification schemes for production and trade do not require countries to report the fruits within this cluster separately, thus official data remain sparse. It is estimated that, on average, mango accounts for approximately 75 percent of total production quantity, guava for 15 percent and mangosteen for the remaining 10 percent.*



related closures and disruptions. Chinese imports of mangoes thereby expanded almost five-fold in 2020, to 84 000 tonnes, of which some 80 percent originated in Viet Nam. Imports by the European Union, meanwhile, were drastically constrained by COVID-19-related supply disruptions and experienced a fall of 10.6 percent compared to 2019, despite higher supplies from Brazil and Peru, the two major suppliers to European Union markets. As such, the European Union's quantity share in global imports fell to 18 percent in 2020, down from 22 percent in 2019.

Indicative average wholesale prices of mangoes in the United States (Fig. 5), which exclude mangosteen and guava, continued to reflect seasonal fluctuations in supply and demand in 2020, albeit with a lower frequency of variation than in previous years. Prices reached a peak of USD 2.4 per kilogram in October 2020, in response to low supplies, but displayed a distinct downward trend in 2020 overall on account of a generally ample supply situation. Specifically, two distinct troughs occurred in February and November 2020, when supplies from Peru and Ecuador, respectively, were particularly strong. For the year as a whole, the annual United States of America wholesale prices averaged 13 percent per kilogram below the 2019 level.

Figure 4 - Mango, Mangosteen, and Guava: Export quantities from the leading exporters (2016 to 2020)

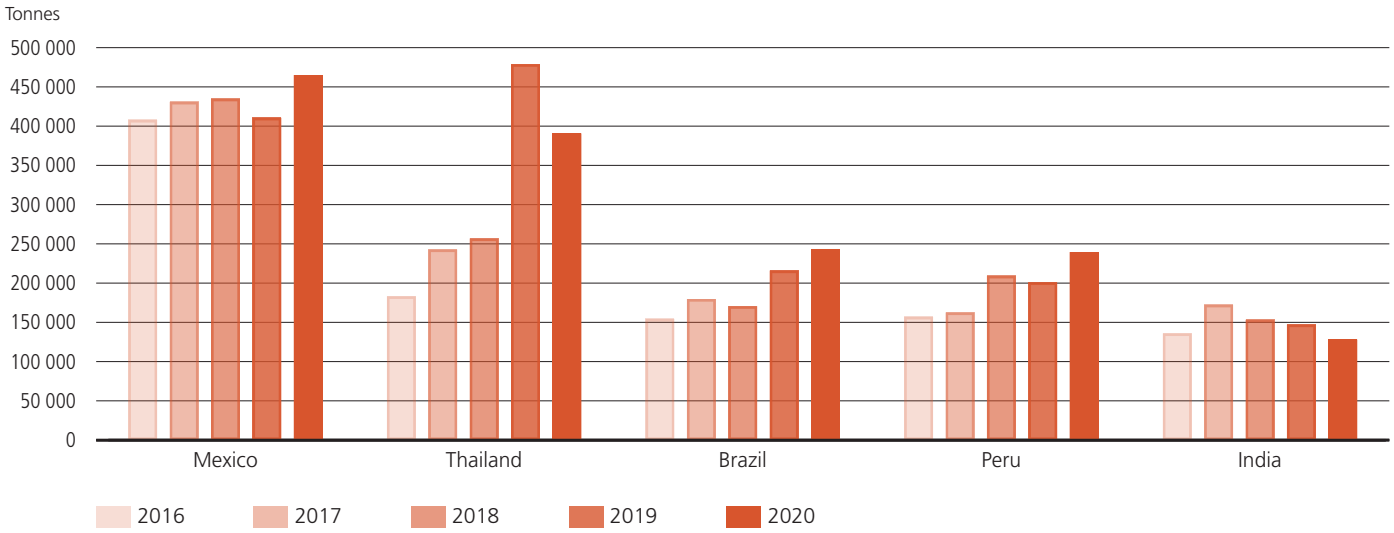
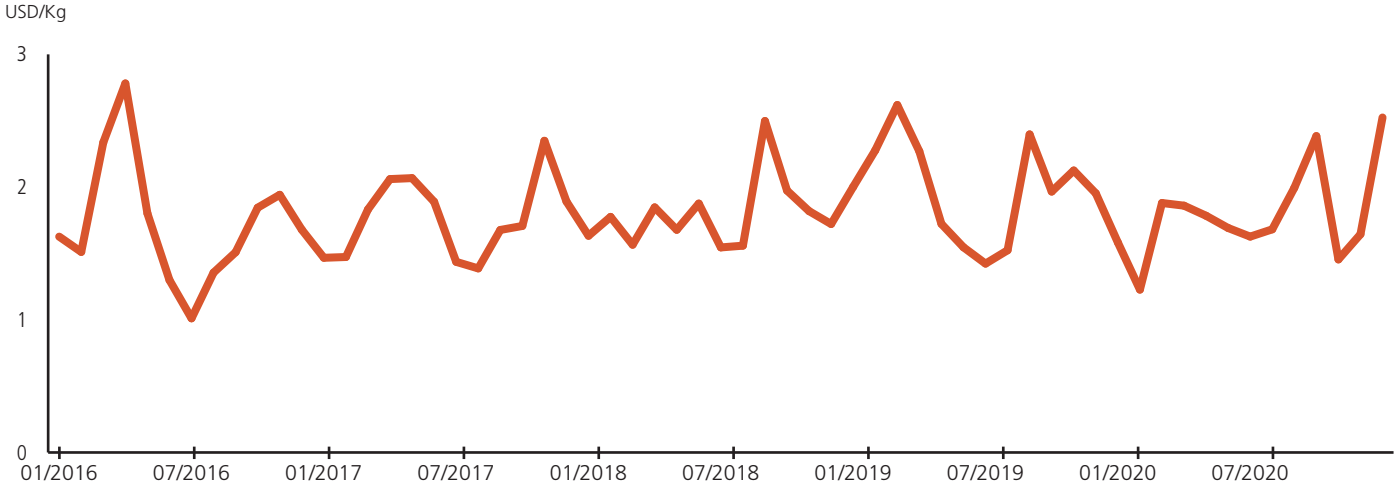
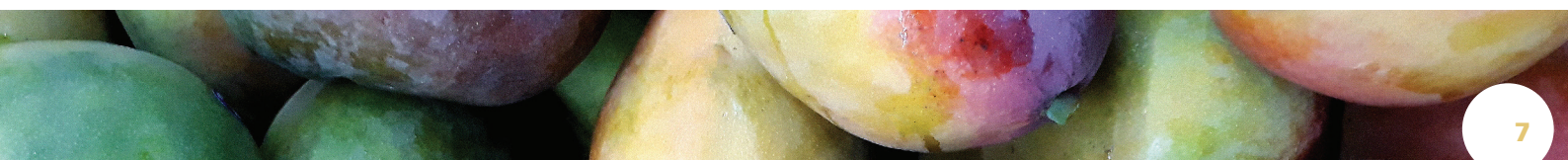


Figure 5 - Mango: United States of America, Indicative average wholesale prices (January 2016 to December 2020)





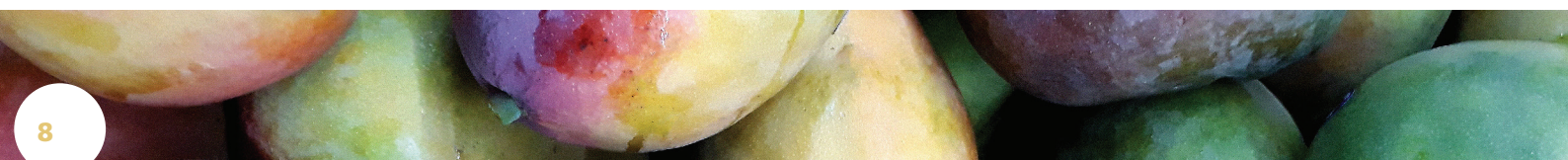
Pineapple

Global exports of pineapples seem to have been strongly impacted by the adverse effects of the COVID-19 pandemic in 2020. Available data suggest a total export quantity of 3.1 million tonnes in 2020, representing a 7.9-percent fall compared to 2019. The two main global exporters of pineapples, Costa Rica and the Philippines, both experienced sharp declines in shipments, at -7.7 percent and -5.8 percent, respectively (Fig. 6). Industry sources reported that exports from both countries were hindered by lockdown-related reductions in labour availability and the global shortage of cooling reefer containers. Costa Rican exports, which fell to some 2 million tonnes, additionally faced lower demand from the European Union and the United Kingdom, which in 2020 procured approximately 25 percent and 16 percent less pineapples from Costa Rica, respectively. Pineapple exports from Costa Rica are almost exclusively destined to the United States and the European Union, with 51 percent of shipments sent to the United States in 2020 and approximately 37 percent to the European Union. According to industry sources, the difficult demand situation in both the United States and the European Union resulted in significant pressure on the Costa Rican pineapple industry, and in particular on smallholder farmers who struggled to absorb the losses from cancelled orders. Exports from the Philippines, meanwhile, contracted by a reported 5.8 percent in 2020, to 595 000 tonnes. The country experienced substantially lower demand from China and South Korea, two major importers of Filipino pineapples. Both of these importing countries had introduced strict lockdowns early in the year, hampering their import routes, as ports and warehouses operated at drastically reduced capacity. Over the full year, shipments of pineapples from the Philippines to China amounted to approximately 200 000 tonnes, a 6 percent decline compared to 2019, while exports to South Korea decreased by 10 percent, to approximately 75 000 tonnes. Shipments to Japan, another key importer of Filipino pineapples, meanwhile contracted by 1.8 percent, to 210 000 tonnes. Likewise, exports to emerging destinations in the Near East, notably the United Arab Emirates, Saudi Arabia and Iran, declined by between 11 and 13 percent in 2020.

The negative impact of COVID-19 also reportedly affected shipments from several African ACP exporters, which primarily supply to European Union markets. According to available data and information, exports from Côte d'Ivoire, the leading African supplier of pineapples to world markets, fell by 18.7 percent in 2020, to 26 000 tonnes. Similarly, shipments from Ghana, previously the second leading exporter from Africa, contracted by 57 percent in 2020, to approximately 8 200 tonnes. Both exporters suffered particularly from lower import demand in France, which led to the cancellation of previously agreed orders. Exports from Ghana additionally struggled to compete with the very low prices of pineapples from other origins, with the average import unit value of shipments from Ghana to France exceeding USD 1 100 per tonne in 2020. By comparison, this was some 55 percent higher than the average import unit value of purchases by France from Costa Rica. Meanwhile, shipments from Kenya, an emerging pineapple supplier, grew by 114 percent in 2020, to approximately 22 400 tonnes, thereby placing the country as second leading exporter from Africa. Some 70 percent of supplies from Kenya were destined to countries of the Persian Gulf, namely Saudi Arabia, the United Arab Emirates and Kuwait, where import demand for fresh tropical fruits has been burgeoning.

Amidst these difficulties, global imports of pineapples decreased to 2.8 million tonnes in 2020, an approximate contraction of 8.9 percent compared to 2019. Industry sources reported that the widely implemented closures of the hospitality sector in the two leading importers, the United States and the European Union, impeded the typical distribution structure for pineapples and resulted in a noticeable reduction in import demand. In the United States, for example, food service sales of pineapples account for some 60 percent of total sales.[4] Against this backdrop, imports by the United States decreased by 3.4 percent in 2020, to approximately

[4] *Estimate by the International Pineapple Organization.*



1 million tonnes, equivalent to 37 percent of total global import quantities. Imports by the European Union (EU-27, excluding intra-EU trade) decreased by 11.7 percent in 2020, to approximately 750 000 tonnes – their lowest level since 2016. Similarly, imports by China, the third global leading importer of pineapples, fell by 16.4 percent in 2020, to some 210 000 tonnes, with the bulk of the decrease accounted for by lower procurements from the Philippines.

Indicative average wholesale prices of pineapples in the United States (Fig. 7) closely reflected the decline in demand and followed an overall downward trend throughout the year, decreasing from USD 1.59 /kg in January to USD 0.92 /kg in December 2020. Overall, the annual average wholesale price of pineapples stood 4 percent lower in 2020 than in the previous year, exerting further downward pressure on a market that is characterised by strong competition. Particularly in key import markets, such as the United States, the United Kingdom and Germany, the fruit is habitually sold at low prices in retail outlets, which puts downward strain on producer margins.

Figure 6 - Pineapple: Export quantities from the leading exporters (2016 to 2020)

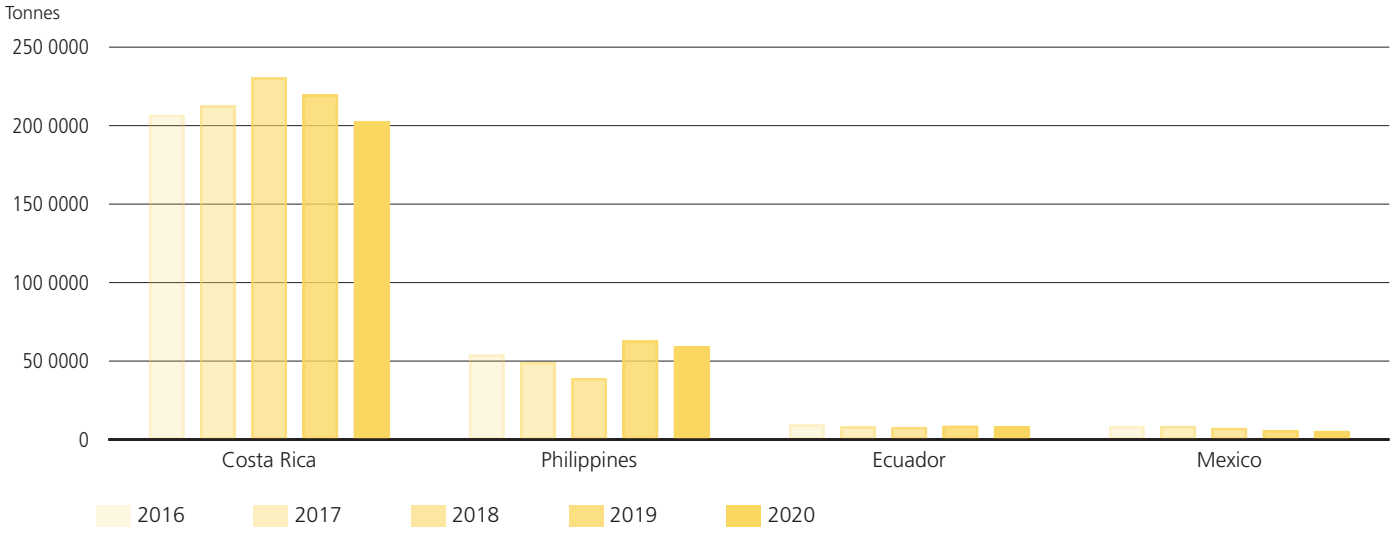
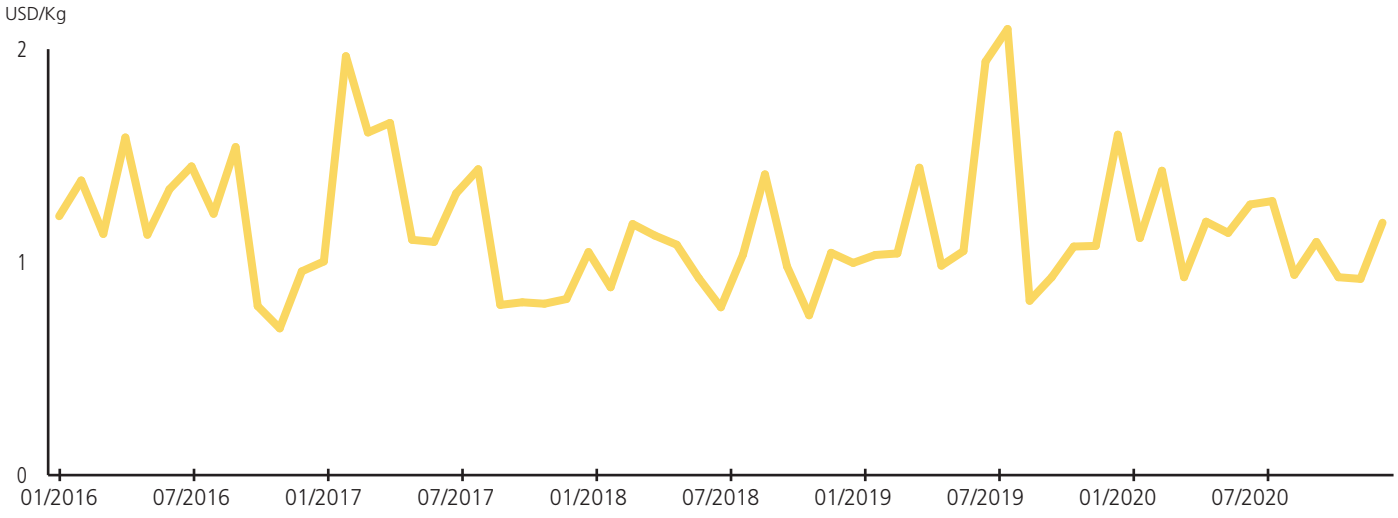
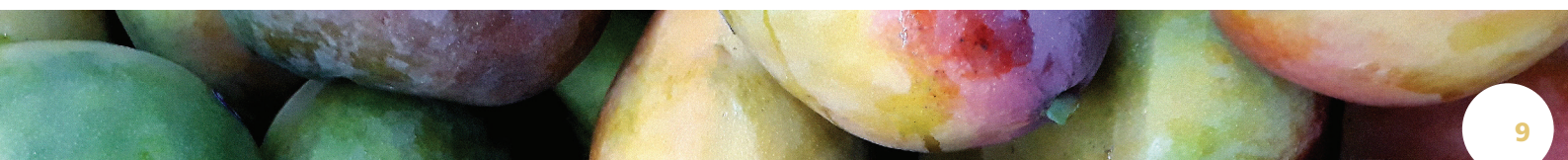


Figure 7 - Pineapple: United States of America, Indicative average wholesale prices (January 2016 to December 2020)



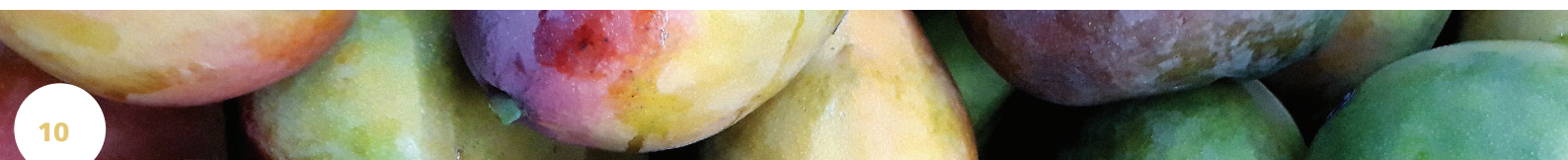


Avocado

Available data suggest that global exports of avocados grew by 8.2 percent in 2020, to approximately 2.3 million tonnes, on account of strong supplies from major producing countries. In previous years, ample global demand and lucrative export prices for avocados were critical drivers of growth, stimulating substantial investments in area expansion in both major and emerging production zones. Data from Mexico indicate a 4-percent expansion in avocado production in 2020, due to a near equivalent rise in area, enabling Mexico to register a 6.2-percent increase in exports in 2020, to nearly 1.4 million tonnes (Fig. 8). As such, the share of trade in Mexican avocado production rose to 57 percent, from 55 and 56 percent in 2018 and 2019, respectively. In global trade, Mexico, where avocados originated, typically accounts for some 60 to 65 percent of total export quantities, due to its ability to produce the fruit in all seasons and its focus on the higher quality Hass variety, which is in greater demand in world markets than other varieties. The country's proximity to the United States is another determining factor since it provides Mexico with a unique competitive advantage in North American markets, placing it as the leading supplier of avocados to the United States. Available data indicate that in 2020, approximately 77 percent of Mexico's avocado exports were supplied to the United States, some 7 and 5 percent to Canada and Japan, respectively, and some 5 percent to the European Union. In view of hampered demand from the United States, where lockdowns impeded sales to the hospitality sector, the indicative average export unit value of avocado shipments from Mexico registered a reported 12.8-percent decrease from 2019, to an average of USD 2 178 per tonne in 2020.

Favourable weather and successful prior investments in production expansion resulted in significantly higher supplies also from Peru, Colombia and Kenya - three emerging avocado exporters. All three suppliers were able to achieve double-digit growth in exports in 2020, and together accounted for about 25 percent of total global exports. As the second largest global supplier of avocados, Peru alone reached a quantity share of 18 percent of global exports in 2020, compared with some 15 percent in the previous year. This reflected a remarkable expansion in shipments from Peru of 32 percent in 2020, to approximately 410 000 tonnes, some 52 percent of which were destined to European Union markets. In conjunction with lower global demand, the strong supply situation in Peru resulted in a 23-percent fall in the indicative average export unit value for avocados from the country in 2020, to an average of USD 1 800 per tonne. This was an enabling factor for increased avocado shipments from Peru to the European Union, which registered approximately a 35-percent growth in 2020. Supplies from Peru to the United States, meanwhile, contracted by 7 percent in 2020, to 79 000 tonnes. The United States had previously imported approximately 27 percent of Peruvian avocado supplies, but this fell to 19 percent in 2020. Exports from Colombia rose by a reported 73 percent in 2020, to approximately 77 000 tonnes, with 86 percent of these destined to European Union markets. Indicative average export unit values from Colombia stood at approximately USD 1 900 in 2020, a contraction of 5 percent from 2019 and a reasonably low level compared to the indicative world average export unit value of USD 2 400 in 2020[5], which supported the strongly positive export performance of Colombia. Exports by Kenya, another emerging supplier to global markets and leading avocado exporter from Africa, grew by 24.8 percent, to approximately 79 000 tonnes in 2020. More than half of Kenya's exports were supplied to European Union markets in 2020, where the country was able to compete well on account of very low average export unit values, ranging at around USD 1 455 in 2020 following a contraction of 9 percent from 2019. Other globally significant exporters of avocado are Chile, Israel and South Africa, which primarily supply the European Union and benefit from the comparatively lower presence of Mexican avocados in European markets. In 2020, however, exports from Chile were hampered by the impact of COVID-19 and, critically, by the conditions of severe drought experienced in central Chile.

[5] *NB the indicative world average export unit value includes the quantities and values of re-exports.*



Exports from the country, which was previously the third leading supplier of avocados to world markets, fell by 33 percent in 2020, to approximately 97 000 tonnes. Similarly, production and exports in Israel were hindered by a persistent heat wave and water scarcity, which reportedly reduced the quantity and quality of the country's avocado harvests in 2020. Available data indicate that exports from Israel declined by 49 percent in 2020, to approximately 18 000 tonnes. Exports from South Africa experienced a 1.4-percent contraction in 2020, to 47 300 tonnes, reportedly due to COVID-19-related disruptions at the Port of Cape Town and difficulties to access reefer containers.

Available data and information indicate that global imports of avocados expanded by 6.9 percent in 2020, to approximately 2.3 million tonnes. The major import markets, the United States and the European Union, absorbed some 48 percent and 25 percent of global shipments in 2020, respectively. In both markets, out-of-home consumption accounts for a substantial share of total avocado consumption, which rendered demand for the fruit vulnerable to the impact of the widely implemented lockdown measures. For example, in France, the largest avocado consuming country in the European Union, one-third of total avocado supply is reported to be consumed out of the home.[6] This share is estimated to be even higher in the United States. However, despite the reduced foodservice sales, available data and information suggest that avocados performed positively in both key import markets. Demand was underpinned by the ample availability of the fruit at comparatively low prices in both the United States and the European Union, and by the fruit's assumed health benefits related to its very high nutritional value. In response to pandemic-induced health concerns, consumers reportedly displayed a higher propensity to spend on nutrient-rich foods perceived to support the immune system. According to available data and information, imports by the United States grew by 1 percent to a peak of 1.1 million tonnes in 2020, albeit accompanied by a 12.4 percent decline in indicative average import unit values. On average, 90 percent of avocado imports into the United States originate in Mexico. Meanwhile, imports into the European Union (EU-27) grew by 13.8 percent, to approximately 592 000 tonnes. Imports by the Netherlands, one of the major trade hubs within the European Union, reported growth in imports from Peru and Colombia of 44 and 75 percent, respectively. Within the European Union, growth was particularly strong in Germany, where imports expanded by 29 percent in 2020, to approximately 126 000 tonnes. Ample growth was also seen in newly emerging avocado consuming countries, notably Italy and Poland, which respectively posted import growth of 18 and 10 percent in 2020, with purchases reaching approximately 29 000 and 25 000 tonnes, respectively. All three countries primarily procured avocados re-exported from the Netherlands.

Indicative average wholesale prices of avocados in the United States (Fig. 9) ranged 16 percent lower in 2020 than in the previous year. Prices peaked at USD 4.91 per kg in March 2020, when supplies from Mexico were low, but displayed a strong tendency to fall throughout the rest of the year, reaching a trough of USD 3.13 per kg in December 2020. The annual average price of USD 3.97 per kg was substantially lower than those registered in the previous years, when price fluctuations were larger and peaks would typically reach between USD 5 and USD 9 per kg.

[6] *www.fruitrop.com/en/Articles-by-subject/Direct-from-the-markets/2020/The-impact-of-covid-19-measures-on-fruit-and-vegetables-distribution-in-France*

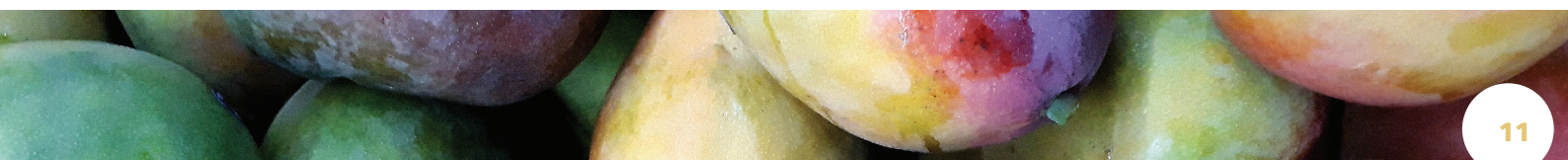


Figure 8 - Avocado: Export quantities from the leading exporters (2016 to 2020)

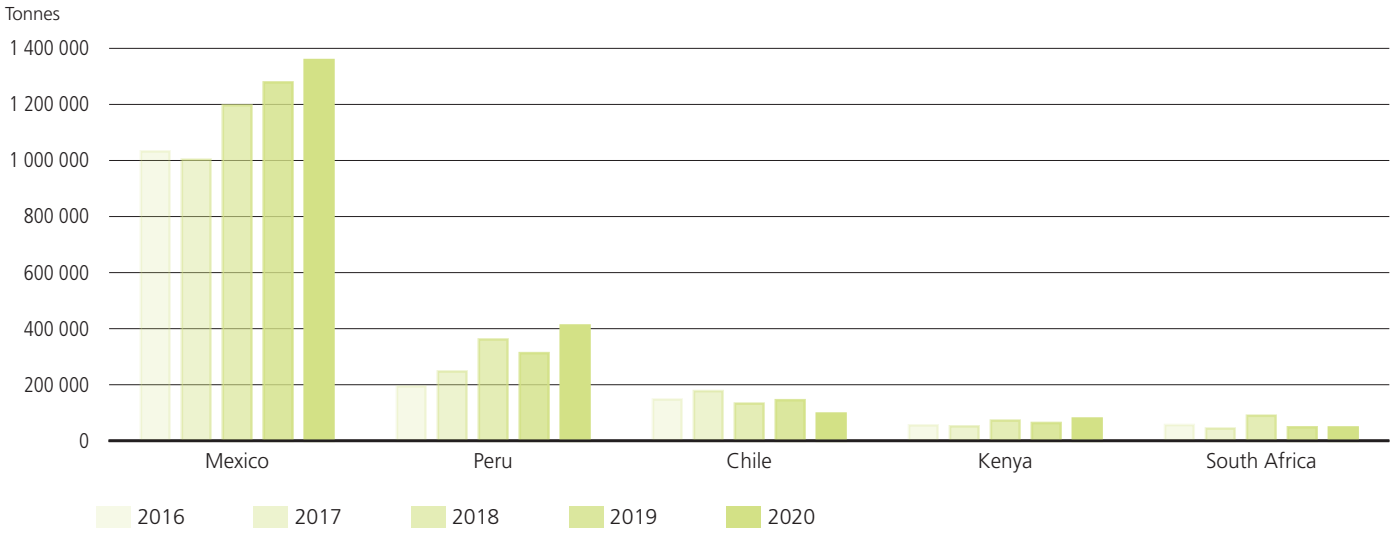
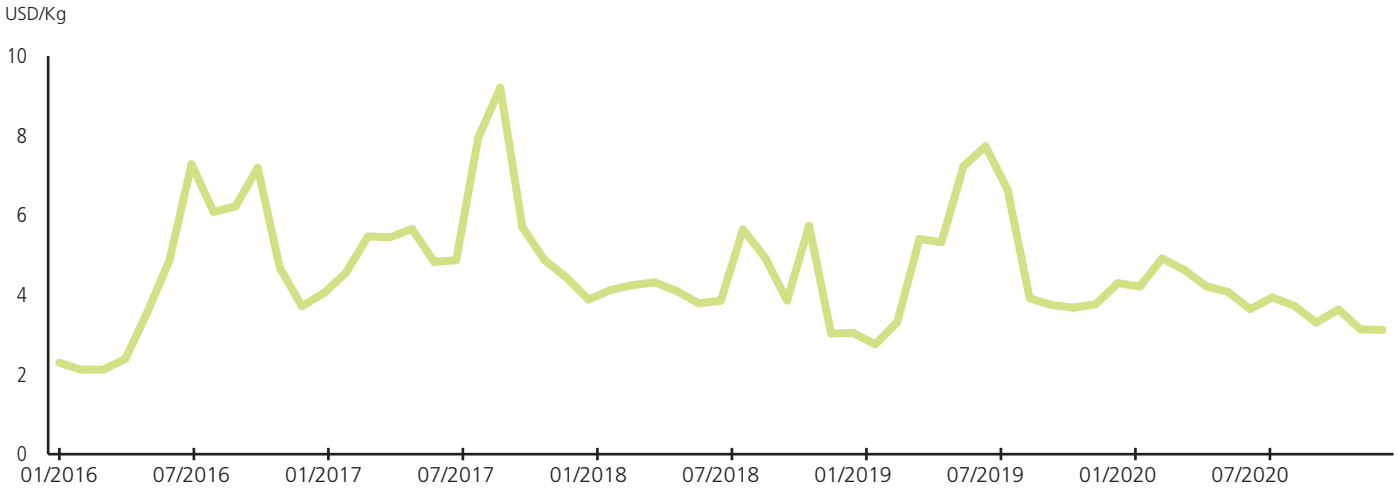
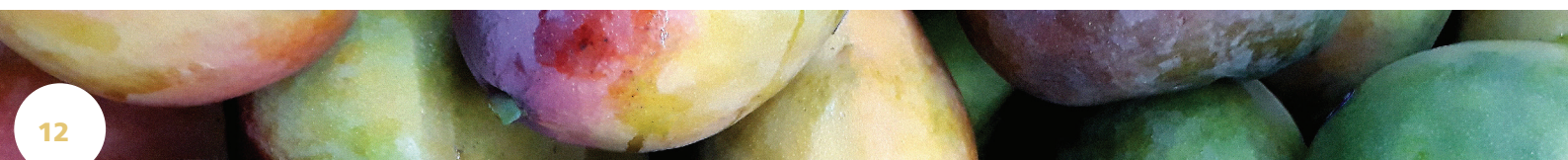


Figure 9 - Avocado: United States of America, Indicative average wholesale prices (January 2016 to December 2020)





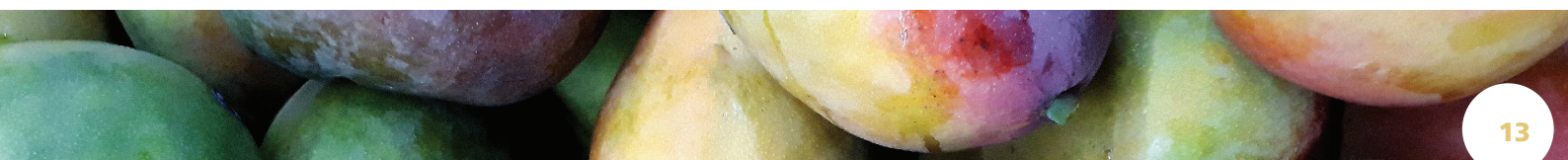
Papaya

Available data indicate a slight increase in global exports of papayas of 2.7 percent in 2020, to some 353 000 tonnes. The key reason behind this growth is a continued production expansion in Mexico, the largest global exporter of papayas, where output grew by a reported 3.2 percent in 2020, to 1.1 million tonnes, mainly on account of a 2.4-percent rise in yields. While the bulk of Mexican papaya production is destined for domestic consumption, the country increased exports by a reported 4.7 percent in 2020, to approximately 170 000 tonnes (Fig. 10), the equivalent of 48 percent of global exports. Virtually all Mexican papaya exports are destined to the United States, which ranks as the largest importer of papayas globally, accounting for an import share of about 55 percent in 2020.

The second and third leading suppliers of papayas to world markets continued to be Guatemala and Brazil, which exported some 55 000 tonnes and 44 000 tonnes in 2020, respectively. Approximately 70 percent of supplies from Guatemala were destined to the United States in 2020, where papayas of the Tainung variety continued to be well received owing to their versatility, consistency in quality and resistance in transport. The remaining share of papayas from Guatemala primarily reached neighbouring El Salvador, where domestic production continued to be low. However, the impact of the pandemic significantly affected trade flows between the two countries in 2020, with data on papaya shipments from Guatemala to El Salvador showing a decline of 26 percent. As such, total papaya exports from Guatemala fell by 11 percent in 2020. Meanwhile, exports from Brazil, one of the leading producers of papayas globally, contracted by 1.2 percent in 2020. Export supplies from Brazil are predominantly destined to the European Union, with only a small share of some 4 percent reaching the United States in 2020. At an average import unit value of USD 1 342 per tonne, shipments from Brazil compete less well in the United States than supplies from Mexico, whose import unit values averaged substantially lower at USD 583 per tonne in 2020. However, the bulk of Brazilian papaya production caters to the domestic market, where demand for the fruit remains high.

Exports from Malaysia, the fourth leading supplier of papayas to world markets, increased by a reported 18.2 percent in 2020, to approximately 22 500 tonnes. This performance was moderately supported by a slight expansion in the country's papaya cultivation area, which facilitated an increase in the produced quantity of 1.3 percent in 2020. However, the strong growth in export quantities from Malaysia was accompanied by a 16-percent decline in the average export unit value in 2020. Some 98 percent of papaya shipments from the country were destined to Singapore in 2020, the second-ranking importer globally, where papayas are the most popular fruit among the four major tropical fruits, ahead of mangoes and pineapples.

Reported global imports of papayas remained relatively stable in 2020, at a total quantity of some 323 000 tonnes. Available data indicate a rise in imports by the United States of 1.1 percent in 2020, to 178 000 tonnes. As was observed for mangoes and avocados, demand for papayas in the United States was supported by consumers' higher awareness of the importance of healthy nutrition, with papayas benefiting from their image as being a rich source of vitamin C. Imports by the European Union (EU-27), meanwhile, decreased by 4 percent in 2020, to approximately 35 000 tonnes, due to the COVID-19-induced disruptions to international air transport, which proved particularly detrimental to the long-distance shipments of highly perishable papayas. As papaya prices in the European Union are strongly influenced by airfreight costs, the drastically reduced number of flights from South America resulted in higher unit values in 2020. For example, indicative average import unit values in the Netherlands and Germany, the two main importers within the European Union, grew by 8 percent and 7 percent, respectively, in 2020. Although the European Union ranks as the second largest importer globally, consumer awareness of the fruit remains low, which posed an additional hindrance to import growth in 2020. Promotion of the fruit and its nutritional benefits would therefore be key to supporting import demand and further growth for papayas, particularly in the European Union.



Indicative average wholesale prices of papayas in the United States (Fig. 11) continued to follow an upward trend in 2020, averaging USD 7.94 per kg throughout the year, or 4 percent higher than in 2019.

Prices displayed a strong tendency to rise, particularly towards the end of the year when competition from seasonal domestic fruits was lower.

Figure 10 - Papaya: Export quantities from the leading exporters (2013 to 2020)

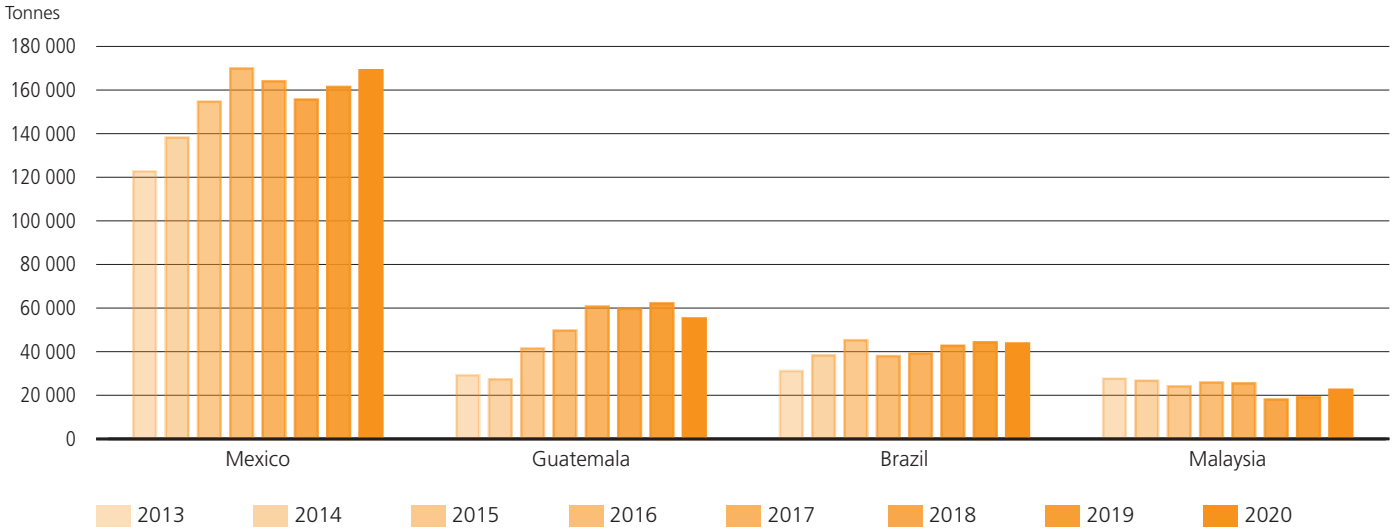
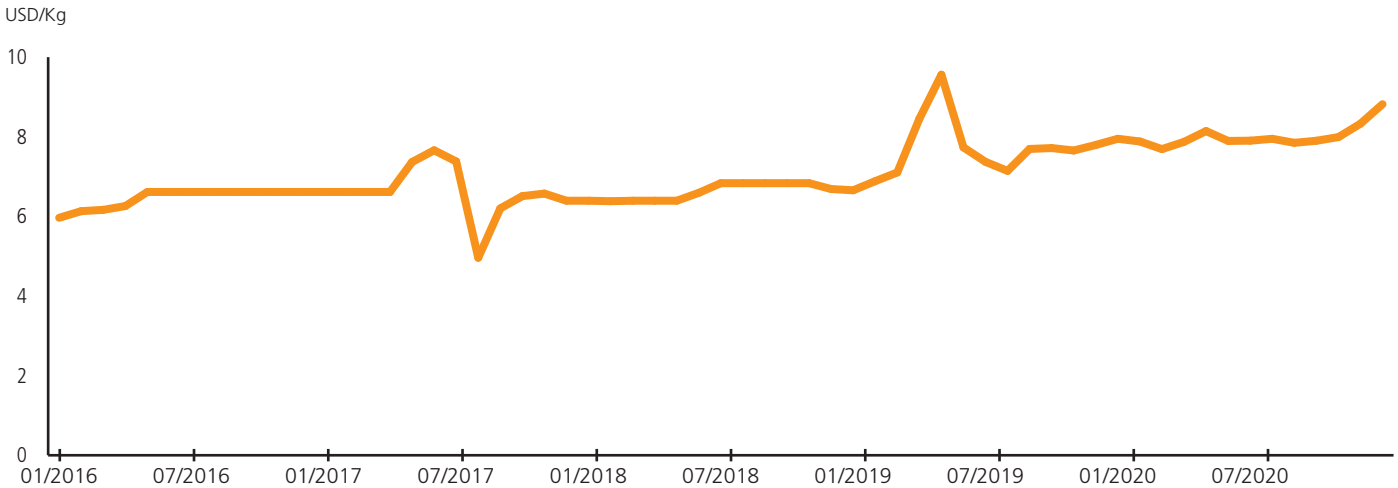
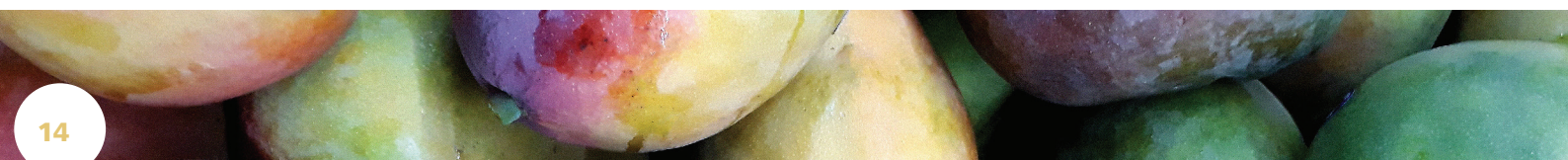


Figure 11 - Papaya: United States of America, Indicative average wholesale prices (January 2016 to December 2020)





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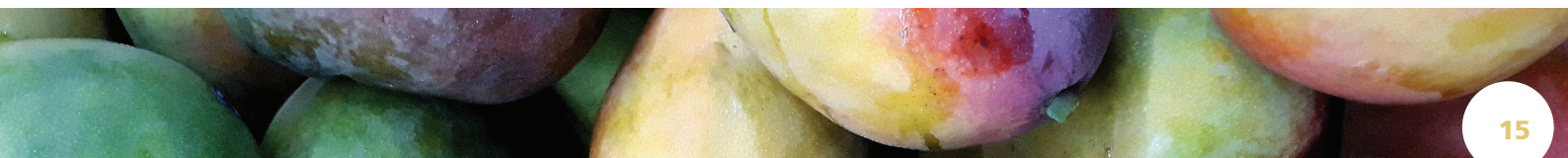

CONTACT

Markets and Trade Division - Economic and Social Development Stream
Team on Responsible Global Value Chains
Tropical-Fruits@fao.org

Food and Agriculture Organization of the United Nations
Rome, Italy

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