



AGRI MAGAZINE

(International E-Magazine for Agricultural Articles)

Volume: 03, Issue: 07 (July, 2026)

Available online at <http://www.agrimagazine.in>

© Agri Magazine, ISSN: 3048-8656

Why Totapuri Mango Prices Crash Every Season

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Every summer, a wave of Totapuri mangoes floods markets across Andhra Pradesh, Karnataka, and Tamil Nadu within a few short weeks, and prices fall off a cliff from a healthy Rs15/kg to something closer to Rs3. A closer look at the three-state “Totapuri Triangle” reveals that some of the cheapest fixes are the most powerful.

1.45M tonnes produced yearly across 3 states	86,000 farming households affected	Rs3–Rs15 the price swing, in one kilogram	Rs265 cr/yr on the table if fixed
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Sometime in June, farmers around Srinivasapur, a small Karnataka town that likes to call itself the state's mango capital, started dumping fruit by the roadside. Not because it had spoiled. Because selling it wasn't worth the cost of the truck. A year earlier, the same Totapuri mangoes had gone for close to Rs 15 a kilo. This time, buyers were offering Rs 3, sometimes less.

A few hundred kilometers north, in Andhra Pradesh's Chittoor district, growers were getting Rs4 to Rs6 better, technically, but still nowhere near what it costs to grow the fruit. Down in Tamil Nadu's Krishnagiri belt, it was Rs3 to Rs5, and farmers there had a fairly simple ask for the state government: just build us a processing unit so we stop being at the mercy of whoever's buying that week.

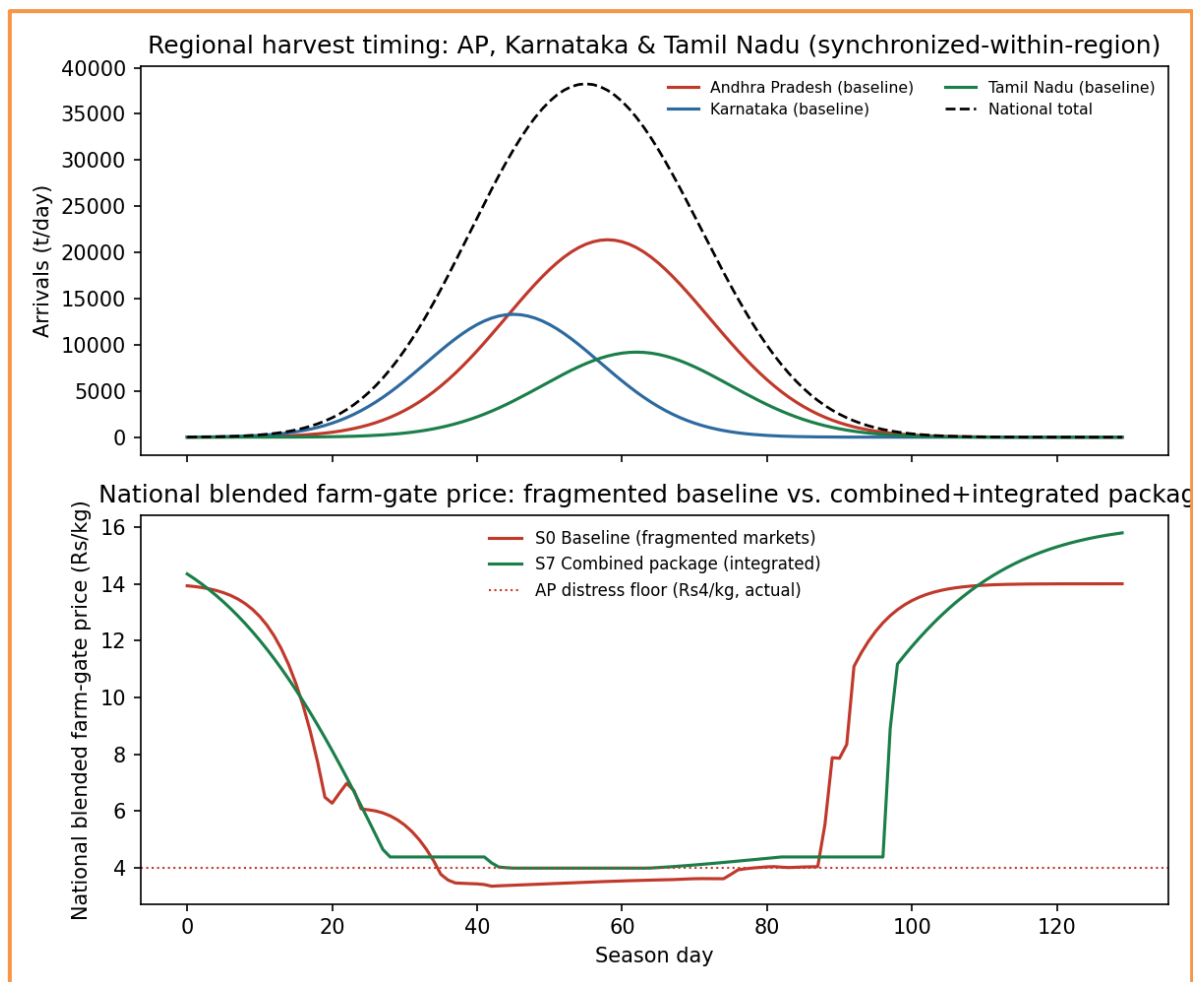
None of this is exactly new. Some version of this crash shows up most years. What's different this time is that someone in Delhi actually noticed. In July, the Union Agriculture Ministry told ICAR, the government's top farm-research body, to set up a committee to investigate why Totapuri prices keep collapsing. This piece and the fuller analysis behind it look at the same question, using production and trade data from all three states. The short version: the causes are fairly well understood, the fixes aren't especially expensive, and at least one of the biggest problems has nothing to do with the mango itself.

A Glut by Design

Totapuri doesn't get much love as a fruit; it's fibrous, more sour than sweet, and not something you'd eat out of hand. As an industrial input, though, it's enormous: something like 60% of India's mango pulp comes from it, feeding juice cartons, ice cream tubs, jams, and bakery lines as far away as Riyadh and Frankfurt. It's grown across a stretch of land that farmers and traders informally call the “Totapuri Triangle”: Andhra Pradesh's Chittoor-Tirupati-Annamayya-Kadapa belt (about 90,000 hectares), Karnataka's Kolar district around Srinivasapur (roughly 47,000 hectares), and a cluster of Tamil Nadu districts Krishnagiri, Dharmapuri, Dindigul, Salem, and Theni, adding up to another 45,000 or so. Put together, that's around 1.45 million tonnes a year and, by one estimate, 86,000 farming households whose income rides on it.

The basic problem is timing. All three regions flower and fruit within a few weeks of each other, so nearly a full year's harvest lands inside a six-to-eight-week window. Processing

plants and cold stores are sized for an average day, not for the one stretch a year when three states' worth of mango shows up at once. And Totapuri doesn't wait around; a few days off the tree and it's finished. Farmers can't hold it back for a better price even if they wanted to. There's no storage of their own, no spare cash to sit on unsold stock, and usually no cooperative behind them to negotiate as a group. So they sell fast, to whoever happens to be buying.



Modeled daily arrivals and farm-gate price across the three states. Karnataka's harvest peaks about two weeks ahead of Andhra Pradesh and Tamil Nadu.

Why do farm-gate prices collapse during the harvest peak?

The mechanism behind the crash is not a single cause but several compounding ones.

- Perishability forces distress selling: Totapuri fruit has a shelf life of days without cold storage, so farmers and small traders have essentially no ability to withhold supply and wait for a better price; the entire crop must clear within weeks of ripening.
- Synchronized harvest concentrates almost a full season's output into a 6–8-week window in each state, so daily arrivals at the peak vastly exceed processing, storage, and fresh-market absorptive capacity, a straightforward too-much-too-fast supply shock.
- A weak farmer bargaining position turns the supply shock into a price collapse rather than just a logistics problem: without FPO aggregation, individual smallholders negotiate one-on-one with traders and processors at exactly the moment their own holding power is lowest (no storage, no working capital to wait), letting buyers set a price near their own reservation price rather than a competitive clearing price.
- Processing capacity is rationally sized for the average season, not the peak: pulp lines running near full capacity for only a few weeks a year would sit idle the rest of the time, so even willing buyers cannot absorb the full glut without uneconomic capacity to hold year-

round, which is exactly why cold storage (to spread the peak out over time) and export demand (to add an outlet) matter as much as processing capacity itself.

- Demand-side shocks compound the supply shock in some years: industry sources explicitly attributed the July 2026 Andhra Pradesh price crash to the West Asia conflict disrupting mango-pulp shipments to Gulf countries, occurring at the same time as the domestic glut. Since Saudi Arabia and other Gulf nations are among India's top mango-pulp export destinations, an export-side shock arriving in the same season as a bumper domestic harvest produces a substantially worse price crash than either shock would on its own.
- An under-explored demand-side ceiling: Industry experts note that mango beverage manufacturers currently use only about 10 ml of mango pulp in a typical 150 ml pack, with the remainder being sugar water; raising this to 20 ml—a formulation change, not new capital—would roughly double per-unit pulp demand from existing beverage volumes without needing any new export market at all.

The Wall Between Chittoor and Kolar

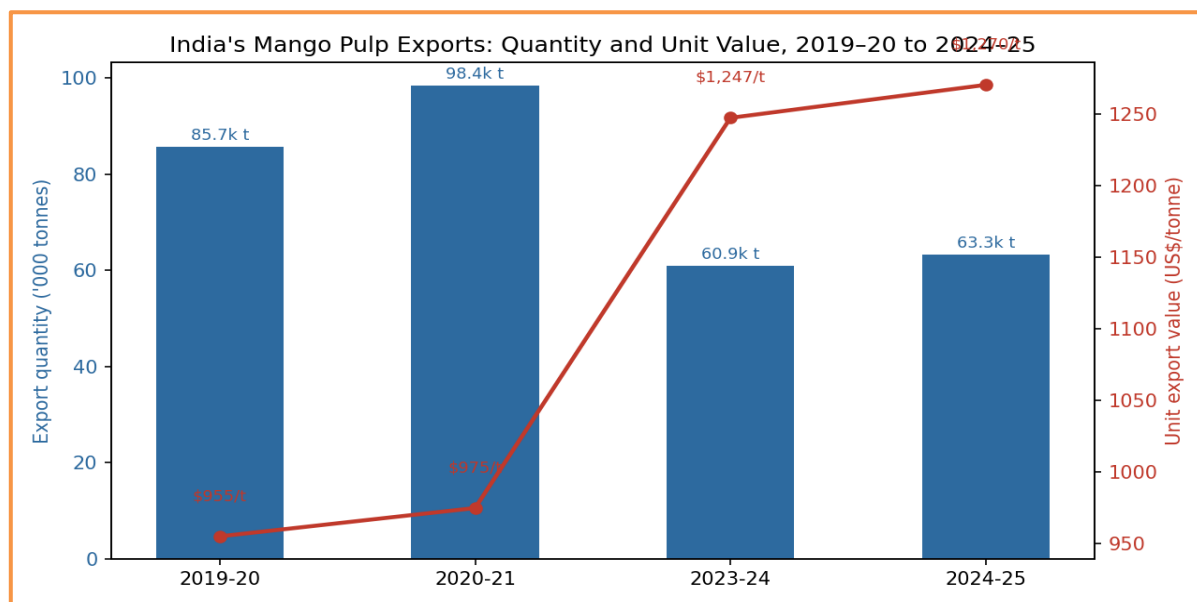
This is where an agricultural story turns into a political one. Karnataka's harvest actually peaks a couple of weeks ahead of Andhra Pradesh's and Tamil Nadu's, which on paper should help early Karnataka fruit move toward Chittoor's processing lines before Andhra's own harvest arrives and those lines get swamped. Instead, in 2025, the Chittoor district administration simply banned Karnataka-grown Totapuri from entering. Karnataka's Chief Minister ended up writing to his Andhra counterpart, asking for the ban to be lifted. Meanwhile, the two states ran entirely separate relief schemes—Andhra's Market Intervention Scheme and Karnataka's Price Deficiency Payment Scheme—with no real attempt to share processing capacity or pool the money behind them.

It would be easy to file this away as local politics, a footnote. The modeling behind this piece treats it differently—as a fifth lever, sitting alongside the usual four: more processing, more cold storage, an export push, and farmer cooperatives. Tearing down the barrier and pooling capacity across the three states does help, but only a little on its own, smaller than you'd hope. The three harvests are close enough together in time that there isn't a huge amount of slack to arbitrage. Market integration by itself isn't the answer. Where it earns its keep is in combination: run it alongside staggered harvesting, extra storage, more processing, and export development, and the whole package delivers roughly Rs40 crore a year more than you'd get from just adding up each piece separately. Letting fruit cross state lines, in other words, is what lets everything else actually work.

The Rs 32 Number

Here's a number worth sitting with. Totapuri pulp sells on the export market for somewhere between \$720 and \$950 a tonne, FOB. Work backwards through the pulp yield and the currency conversion, and a kilogram of fresh fruit turns out to be worth something like Rs32 once it's processed and shipped five or six times what farmers were actually paid at the worst of the glut. Not all of that gap is missing farmer income, obviously; processing, packaging, certification, and shipping all cost real money. But the size of it tells you something. There's a lot of value sitting between the farm gate and the export contract, and a farmer selling one sack at a time under distress has no way of reaching it.

There's a quieter pattern underneath the export numbers too. Volumes have fallen by roughly a third over five years — from about 98,000 tonnes in 2020-21 down to around 63,000 tonnes in 2024-25 — even as the price per tonne on what does get exported has climbed nearly 30%, from about \$960 to about \$1,270. That's an odd combination; a shrinking market doesn't usually get more expensive at the same time. It looks less like fading demand and more like a market that would happily buy more if the supply chain behind it could keep up—which fits everything else here. This isn't a demand problem so much as a capacity and coordination one.



India's mango pulp export volumes have fallen even as export prices have climbed — a pattern more consistent with a supply bottleneck than a shrinking market.

What Actually Works

Run the numbers on each proposed fix separately, and a clear order shows up. Cold storage and processing capacity, on their own, cut down how much fruit gets wasted but barely move the price farmers actually get paid—they help the system absorb the glut without changing when the glut happens in the first place. Staggered harvesting paired with farmer cooperatives is the strongest single lever by a distance: roughly a quarter higher average price and post-harvest losses cut almost in half. It's the only intervention that goes after the timing itself, rather than just building more capacity to cope with the same crush.

Put everything together—staggered harvest, cooperatives, more storage and processing, export development, and knocking down the interstate wall—and the model has the national average price climbing from around Rs3.90/kg to about Rs5.20/kg, with post-harvest losses down from roughly 16% of the crop to under 3%. In money terms, that's something like Rs265 crore a year in additional farmer income across the three states, against an infrastructure bill of around Rs 212 crore—spent once, not year after year.

A Government Is Already Asking

None of this is theoretical anymore. As of this July, ICAR's committee chaired by the director of the Central Institute for Subtropical Horticulture in Lucknow is out visiting growing regions, talking to farmers, processors, exporters, and cooperatives about exactly these questions: how to stabilize prices, add value, and make Indian Totapuri more competitive abroad. Andhra Pradesh has already committed to buying up 7 lakh tonnes this season with extra price support, on top of a central compensation scheme. The state paid out Rs190 crore in mango relief last year and has asked Delhi for another Rs281 crore this year. That's real, recurring money going toward managing the symptoms of something that, on this analysis at least, has a fairly identifiable and fixable cause.

The Bottom Line

It's tempting to think a crisis this size needs an equally big, expensive fix: new cold-storage networks, a wave of new factories. Some of that genuinely is needed. But the single biggest lever here is also one of the cheapest: get farmers organized, spread the harvest out a little, and stop pushing an entire year's crop through the same two-week bottleneck. And the most obvious gap of all — an administrative wall between two states growing the same crop three weeks apart — could be knocked down for the price of a coordination office and a shared price dashboard. For 86,000 families whose income still swings between Rs3 and Rs15 a kilo

depending on a few weeks of timing, that seems like the kind of fix worth making before the next harvest, not the one after.

Policy Recommendations and Investment Priorities

- Fix market integration first, and treat it as urgent, not optional: it is the cheapest lever in this report (Rs5 crore) and directly addresses a documented 2025 policy failure (the Chittoor entry ban) whose economic cost this report has now quantified, even if that standalone quantified cost is more modest than the infrastructure gains its real payoff is unlocking the full value of everything else.
- Prioritize staggered harvesting and FPO aggregation next, in all three states, not just Andhra Pradesh, the model's largest single lever and relatively cheap relative to hard infrastructure.
- Direct new processing capacity toward Karnataka and Tamil Nadu specifically, not Andhra Pradesh; both states are reported to depend on Andhra processors, which is precisely the structural asymmetry that made the 2025 entry ban so damaging. A Krishnagiri processing unit, as Tamil Nadu farmers have requested, would reduce that single-point dependency.
- Replace ad hoc state relief (AP's MIS, Karnataka's PDPS) with a coordinated, pre-committed tri-state mechanism announced before the season starts, not negotiated mid-crisis via Chief Minister-to-Chief Minister letters.
- Fast-track export-readiness infrastructure across all three states, given mango pulp export prices (US\$1,050–1,400/t FOB) sit well above domestic distress-price-equivalent value while also building in resilience to demand shocks like the 2025 Iran-Israel conflict, which cut off a major pulp buyer.
- Pursue demand-side value addition alongside the supply-side package: industry experts note that raising the mango-pulp content of a typical 150ml beverage pack from 10ml to 20ml would roughly double pulp demand from existing beverage volumes at zero new capital cost; diversifying Totapuri pulp into ice cream, lassi, cakes, jellies and shakes, and supporting community-level (e.g., DWCR women's group) value-added product kiosks, are further low-cost demand-side levers largely outside the original five-intervention framing but consistent with its intent.

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