

Monthly dashboard – Pineapple

Sep 2025



Acreage and production trends



Pineapple crop calendar of major producing countries

Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Indonesia												
Phillipines												
Costa Rica												
China												
Brazil												
India												
Nigeria												
Mexico												
Thailand												
Colombia												

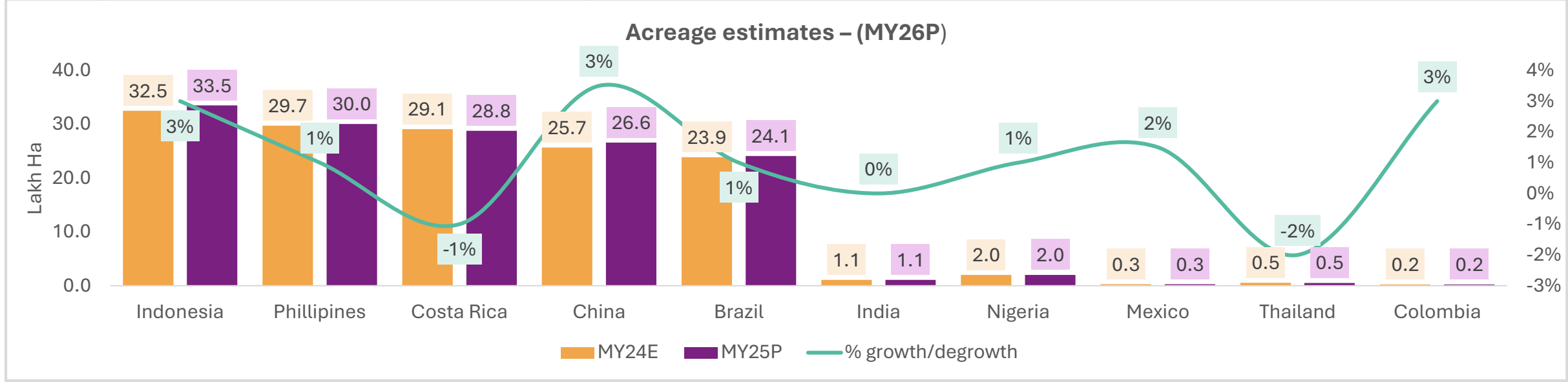
Lean season

Peak season

- The peak harvesting season for many pineapple-producing countries, including Indonesia, Philippines, Costa Rica, China, Brazil, India, Nigeria, Mexico, Thailand, and Colombia, is between March and August.
- Thailand has two main pineapple harvesting seasons: a summer crop from February to June and a winter crop from October to December.
- Countries like Indonesia, Costa Rica, Brazil, Mexico, India, Thailand, and Colombia have pineapple supplies available almost throughout the year, making them major global suppliers.
- Costa Rica is the leading global producer and exporter of the MD2 pineapple hybrid variety, also known as the golden pineapple, which is the most popular variety in the world.
- The MD2 pineapple variety is characterized by:
 - Uniform size and cylindrical appearance
 - Orange-yellow color; creamy-yellow pulp with a crunchy and juicy consistency
 - High water content and low- calorie count
 - Rich in vitamin C and potassium

Note: Pineapple are harvested throughout year globally with crop calendar varies across the countries. Marketing year is considered as Jan-Dec

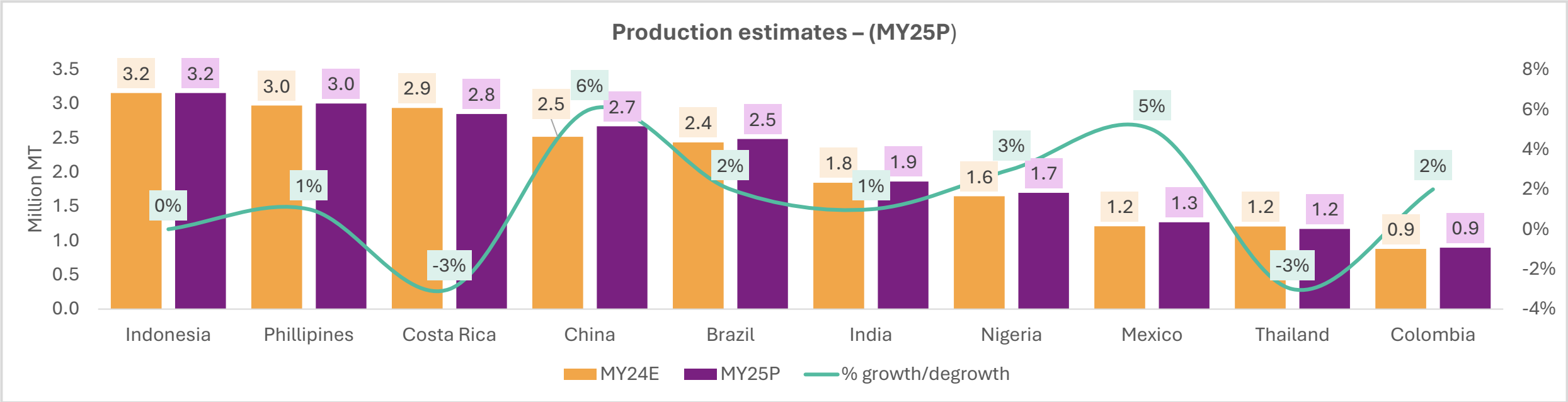
Acreage Estimates of Major Producing Countries



P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~60% of global pineapple area**, with global acreage **expected to rise moderately by 0-1% YoY** in MY25P, driven by Indonesia, China, Mexico, Colombia, Philippines, Brazil, and Nigeria
- **Acreage is expected to decline in-**
 - Costa Rica, due to yield challenges from erratic rainfall and temperature patterns
 - Thailand, due to extreme temperature conditions and yield concerns, despite replanting efforts
- **Acreage is expected to remain stable in India**, while countries like **China**, will see **improved acreage** due to rising export momentum and profitability
- **Mexico**, will see **increased acreage** due to firm domestic prices and high profitability (over \$11,000/ha)
- **Brazil**, will benefit from government initiatives like **"Agricultural Zoning of Climate Risk"** to improve pineapple cultivation
- Colombia, to see boosted acreages due to favorable temperature and rainfall conditions

Production Estimates of Major Producing Countries



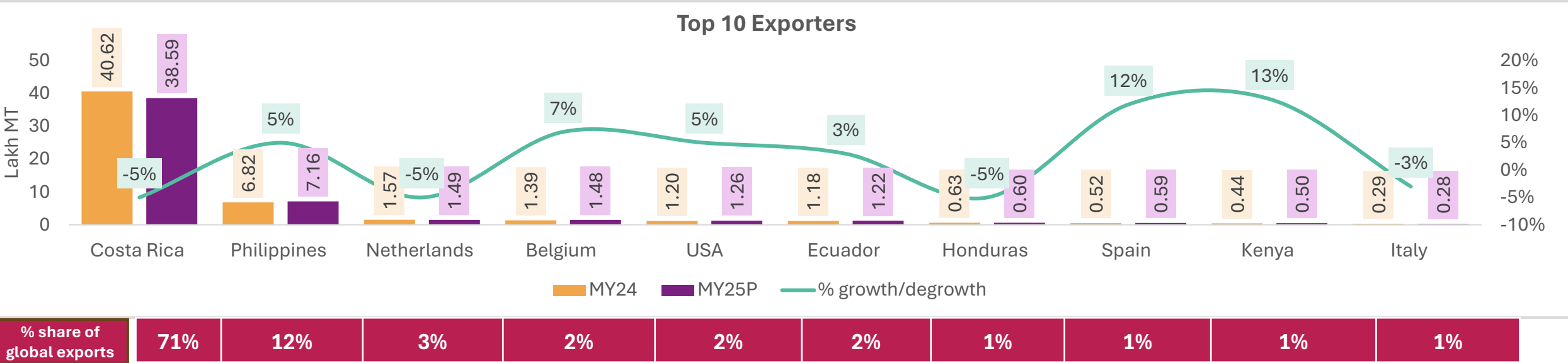
P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~70% of global pineapple production**, with production **expected to moderately improve by 0-1% in MY25P**, driven by China, Mexico, Nigeria, Brazil, Colombia, India, and Philippines
- **Production is expected to decline in:**
 - Costa Rica, due to erratic climatic conditions and the transition from El Nino to La Nina
 - Thailand, due to severe drought and heatwaves driven by the El Niño phenomenon
- **Production is expected to remain stable in Indonesia**, despite some drought effects, thanks to initiatives like vertically integrated plantations.
- **Key trends and drivers across key countries-**
 - **Philippines:** increasing demand for MD2 varieties in China and Europe, leading to improved production
 - **China:** favorable weather conditions and improved cultivation techniques in key growing regions like Guangxi, Hainan, and Guangdong
 - **Colombia:** expanding area under MD2 varieties, driven by growing domestic and global demand



Export trends and price outlook

Major Exporters of Pineapple

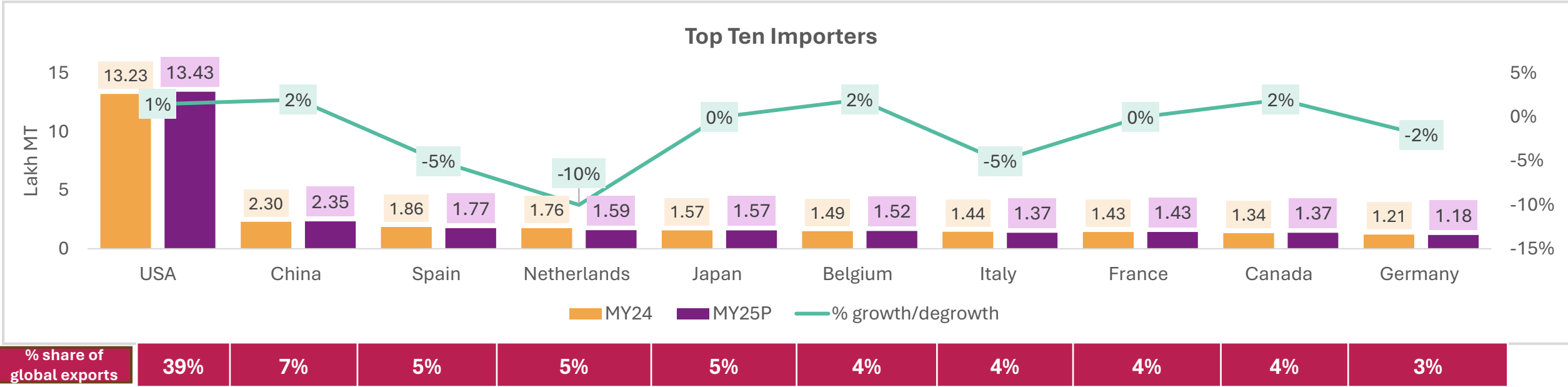


P – Projected value; MY – Marketing year (Jan-Dec)

- Global pineapple exports are **projected to decline by 2-3% in MY25P**, primarily due to declines in Costa Rica, Netherlands, and Honduras.
- Key trends and drivers:**
- Costa Rica:** exports to **decline due to impacted production levels**, but introduction of voluntary sustainability certification to enhance transparency and socio-environmental standards.
- Philippines:** **strong export momentum in MY25**, driven by **growing demand for MD2 varieties** in China, Japan, and South Korea, with **introduction of containerized shipping service** (by Fresh Del Monte)to safeguard quality and command premium prices.
- Ecuador:** diversifying export portfolio to **focus on tropical fruits like pineapple**, with **plans to sign SECA with South Korea** to boost exports.
- Kenya:** developing a **sustainable pineapple export ecosystem** with innovative waste management and environmentally friendly packaging, making it a reliable source during production challenges in Southeast Asia.
- Honduras:** **exports to remain subdued despite increased acreages**, but introduction of new pineapple variety **Colada Royale** may gain traction in the next marketing year.

Note : SECA- Strategic Economic Cooperation Agreement, CANAPEP Costa Rica’s National Chamber of Pineapple Producers and Exporters

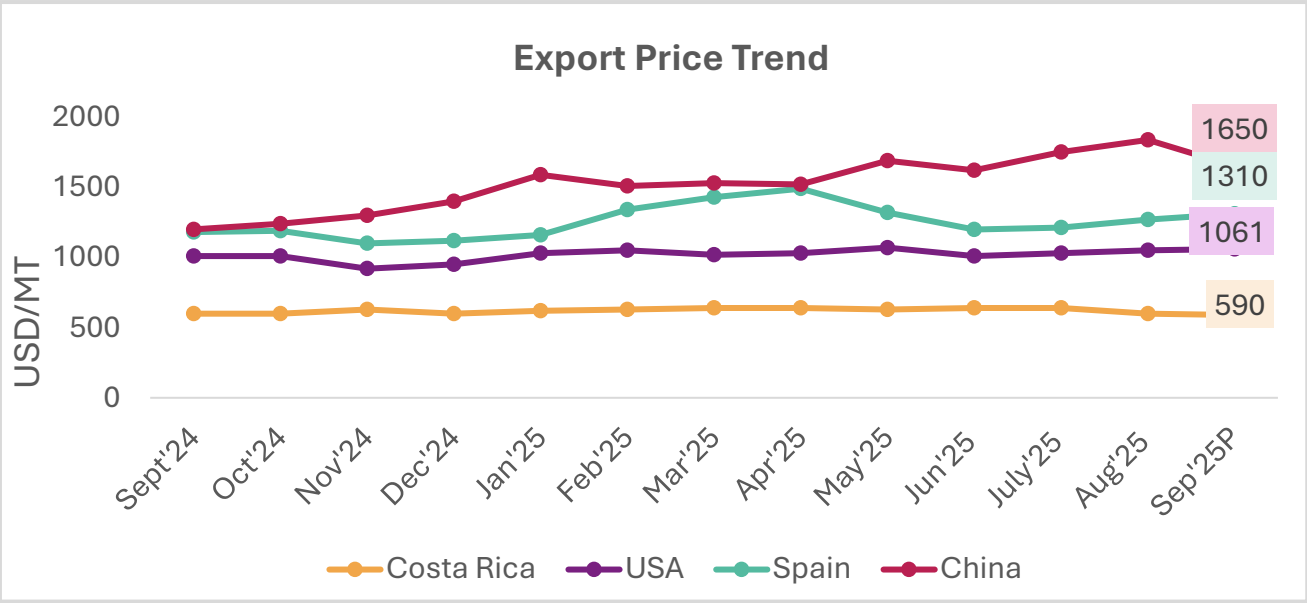
Major Importers of Pineapple



P – Projected value; MY – Marketing year (Jan-Dec)

- **The US has imposed a 15% tariff on Costa Rican pineapples**, which **account for ~90% of US imports**, likely to lower import momentum, but rising demand and insufficient domestic production may offset the decline.
- **China: imports from Myanmar expected to increase** after the government announced the allowance of imports in Nov 2024, but Myanmar needs to seek approval from the GACC.
- **France: high import prices and tight supplies in 2025**, exacerbated by logistical issues, expected to keep imports lower on year.
- **Italy: severe shipment delays due to labor strikes** have kept import sentiments low in MY25.
- **Germany, Italy, Spain, and Netherlands: imports expected to be lower on year** due to impacted production in Costa Rica, with potential shift to other exporting geographies.
- **Japan: pineapple imports have remained stable over the past 4-5 years**, despite a weakening yen, with strong demand for kiwi and **growing imports from Vietnam for processing**.
- Netherlands: also imports pineapples from Peru and South Africa, and exports to other Dutch countries.
- Vietnam: gaining traction as a supplier of pineapples to European countries and China, mainly for processing.

Price Trends and Outlook of Key Exporting Nations

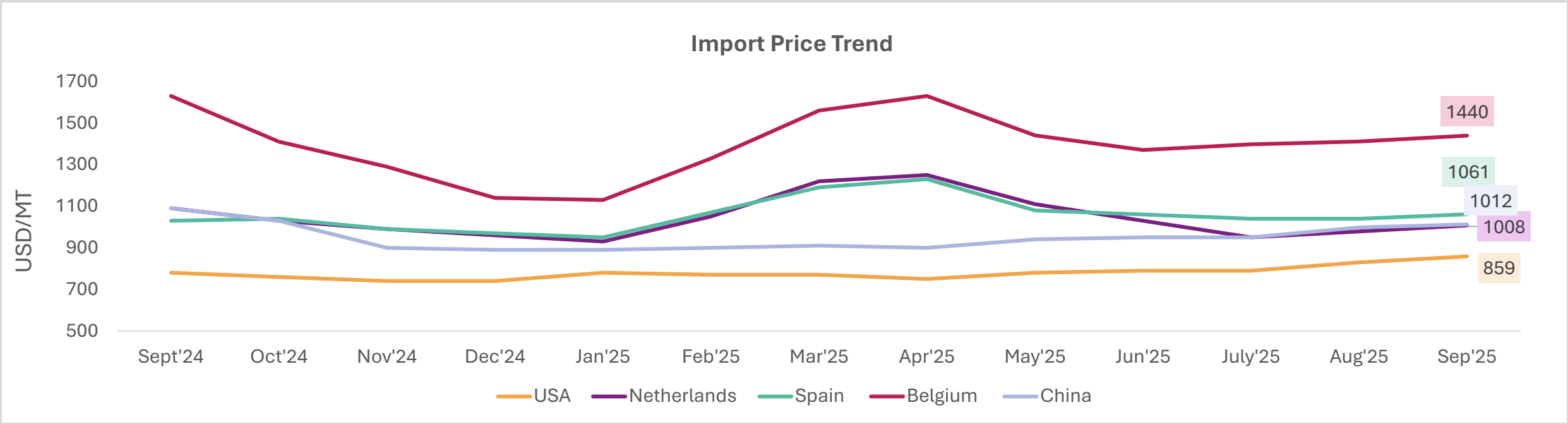


Price outlook for next quarter (OND)					
Countries	Sep'25 Price (USD/MT)	Sep'24 Price (USD/MT)	%age c hange	Price direction	Average price range for OND (USD/MT)
Costa Rica	590	600	-1%	Bullish	610-630
USA	1061	1010	5%	Bullish	1070-1120
Spain	1310	1180	11%	Sideways	1280-1330
China	1650	1200	38%	Sideways	1590-1670

- Costa Rica prices saw an uptick June and July'25** as natural bloom remained weak due to end of season and heavy rainfall led reduced yields, with buyers also reporting concerns over coloration patches. While the supply remained low in Aug'25 and first half of Sep'25, the price sentiments remained bearish due to sluggish demand amid competitive bigger Ecuadorian supply. The second half of September'2025 witnessed minor natural bloom which backed by flat demand contributed to a slight sump in the rates. However heavy thunderstorm on harvesting operations and US tariff in place have curtailed exportable volumes in October'2025, supplies from the country to remain limited translating into bullish price sentiments. `
- Export prices in USA** were flat in September 2025 due to stable supplies from Costa Rica, few Honduras, Guatemala and Ecuador and is expected to remained stable to slightly firmer next quarter due to tight supplies in market in MY25 over production concerns in central American countries.
- In the pineapple trade, re-exports have become increasingly important wherein Spain and USA are two key countries.** Spain exports have registered a good demand from Portugal (~40% CAGR), France (~14% CAGR) and Germany (~12% CAGR) while USA exports are getting traction towards **Canada (5-6% CAGR)** and Caribbean Island nations **(20%-40% CAGR)** which is to keep their prices firm higher YoY. (CAGR mentioned for MY20-MY24)
- With constrained domestic supply, Spain re-exporters received firmer prices in August and September at 3100 USD/MT and is expected to maintain the same momentum in next quarter.
- China** has positioned itself as a reliable supplier, offering a wide range of canned pineapple products to key markets such as Southeast Asia, Europe, and North America which is expected to **keep price stable**.

Source: Crisil Intelligence & ITC trade map
Note : Price forecasting is based on the fundamental analysis. OND stand for October, November, and December. Above prices are FOB prices. CAGR mentioned for the time period : MY20-MY25

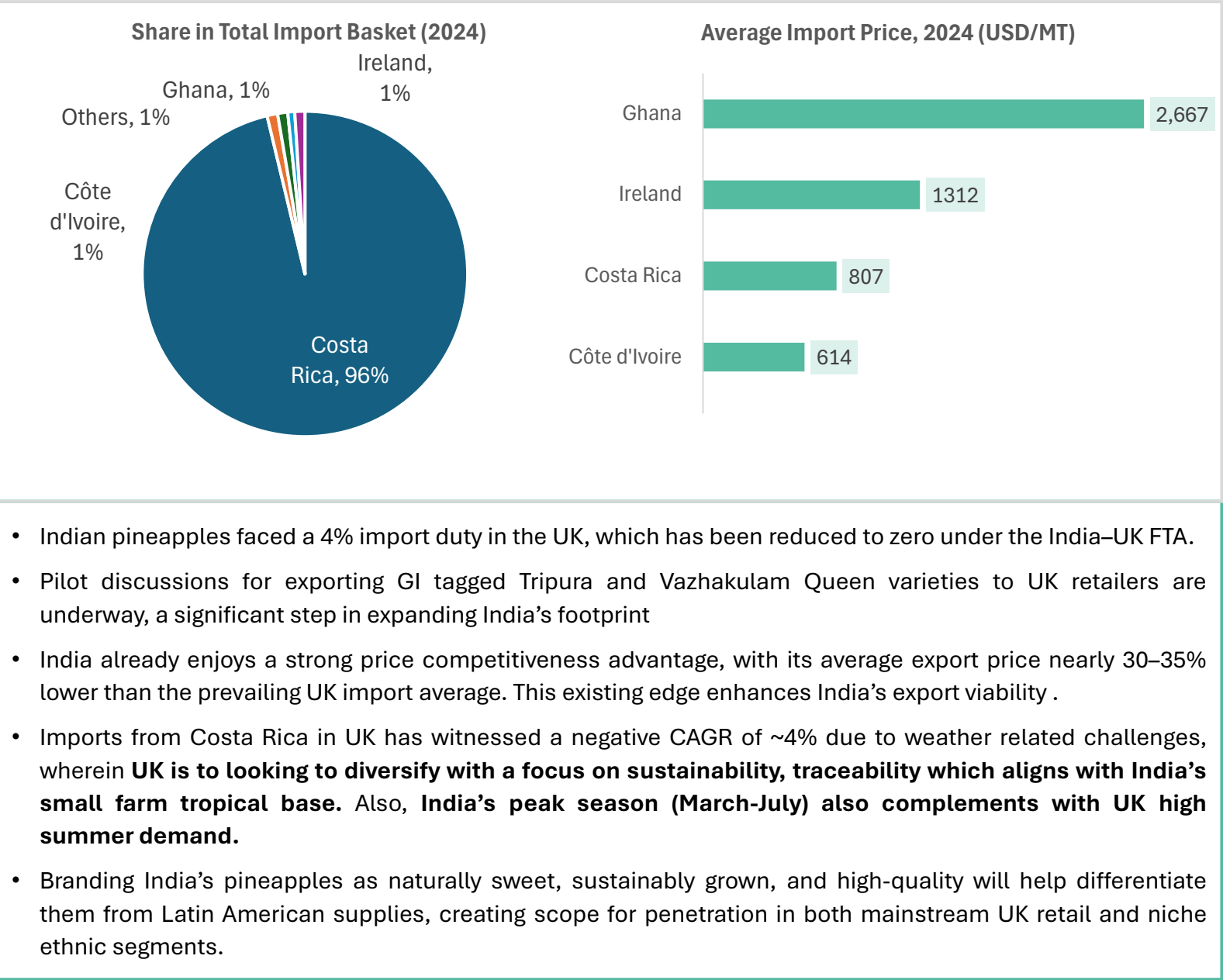
Price trends of Key Importing Nations



- Key importing countries are experiencing elevated prices due to strong demand from processing and fresh segments, amidst tight supplies, driven by the global shortage of orange juice, which has increased industrial demand for pineapple.
- **Prices have risen in:**
 - USA and China, due to tight supplies in key exporting countries
 - European countries like Spain and Belgium, with relatively low increases due to a wide range of suppliers
 - Netherlands, where supermarkets and processing plants are facing supply shortages, leading to firm prices
- Challenges in fulfilling trade contracts are being faced by key pineapple-exporting countries, including Costa Rica, Netherlands, Thailand, and Honduras, due to high input costs, rising domestic demand, and adverse weather conditions
- **Global pineapple prices are expected to remain elevated, potentially through 2026**, due to:
 - **Erratic rainfall and temperature fluctuations** impacting yields in major producing regions
 - **Localized heavy rainfall forecast in Southeast Asia**, potentially disrupting short-term harvest in key suppliers like Thailand and emerging supplier Vietnam

Indian Pineapple Export Opportunity in United Kingdom Market

Imported Volume (2024)	112,495 tonnes
Key Competitive Exporters	Costa Rica, Cote d'Ivoire, Ghana, Ireland and Benin
Share in global pineapple import basket	~5%
India's Penetration (In the country's import basket)	<1% <i>(India 's share remain negligible as compared to overall import basket of UK imports)</i>
Key Imported Product Type	<div><div></div>MD2</div> <div><div></div>Queen/ Queen hybrids</div>
Key Indian Exported Product Type	<div><div></div>Kew</div> <div><div></div>Gian Kew</div> <div><div></div>Queen</div>
Average UK Import Price (2024)	838 USD/MT



Source : ITC Trademap, CRISIL Intelligence

Thank You


Methodology for Price Forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

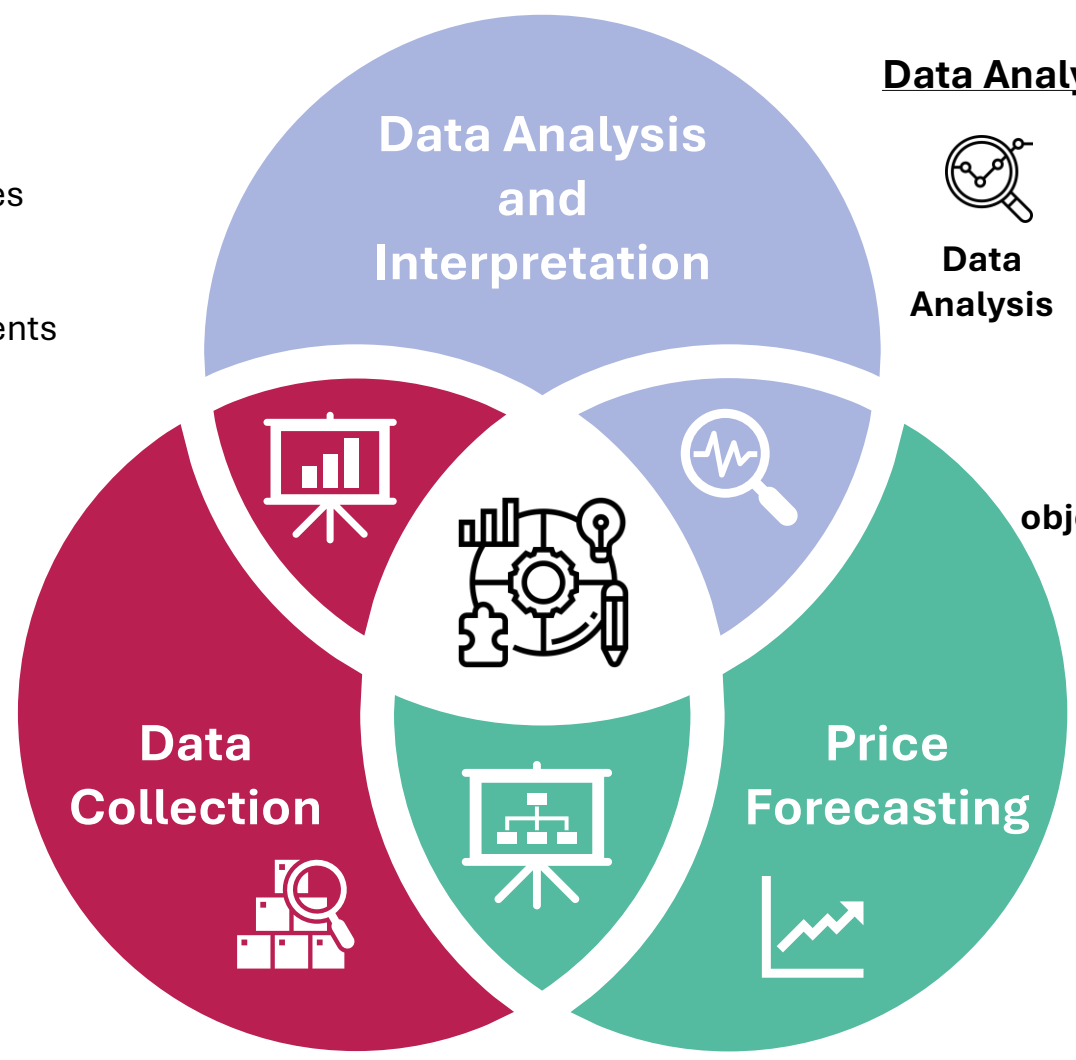
Data Collection

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Sources
- Global agricultural databases (USDA, FAO, etc.)
 - Country-wise statistics from official agriculture departments
 - Industry publications and research reports

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Policy Updates
- Detailed review of Production policies & trade barriers for each country
 - Data from government websites & official publications



Data Analysis and Interpretation

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Data Analysis
- Supply-demand assessment
 - Policy impact analysis
 - Stakeholder consultations

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Key objectives
- Production trends
 - Trade dynamics
 - Policy implications

Price Forecasting

- Historical Trend & Seasonality
 - Macro-Economic & Trade Variables
- Integration of commodity fundamentals to forecast future price ranges.

Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.