

Crisil

a company of **S&P Global**



Monthly dashboard – Pineapple

Jan 2026



Acreage and production trends



Pineapple crop calendar of major producing countries

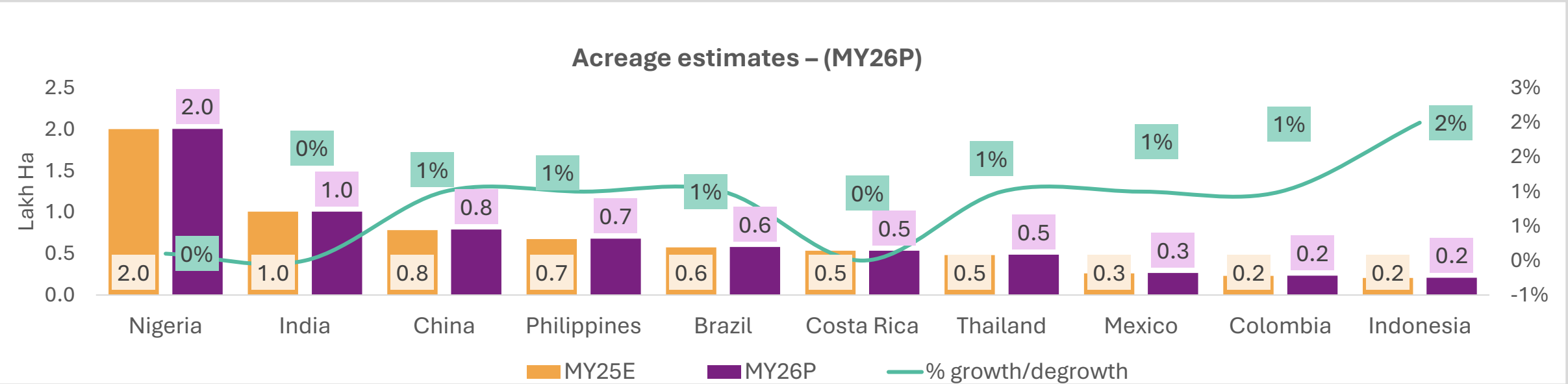
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Indonesia												
Philippines												
Costa Rica												
China												
Brazil												
India												
Nigeria												
Mexico												
Thailand												
Colombia												

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 season from April to July and a winter season from October to December.
- Countries like Indonesia, Costa Rica, Brazil, Mexico, 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

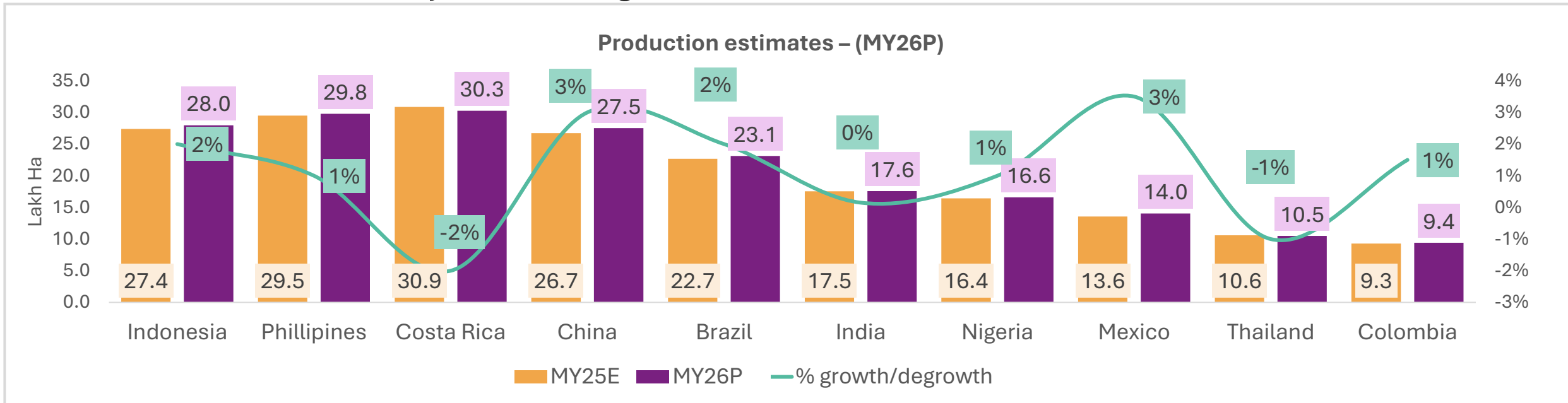


P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~60% of global pineapple area**, with global acreage **estimated to rise moderately by 0-1% YoY** in MY26P, driven by China, Mexico, Colombia, Philippines, Brazil and Indonesia.
- **Costa Rica is expected to remain stable**, as **unstable weather patterns and temperature variability present significant yield challenges**.
- **Acreage is estimated to remain stable in India**, while countries like **China, has seen improved acreage** due to rising export momentum and profitability.
- **Mexico, has reported an 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

Source: Pineapple acreage estimates by country for MY25 and MY26 are derived from trends observed in FAOSTAT data.

Production Estimates of Major Producing Countries



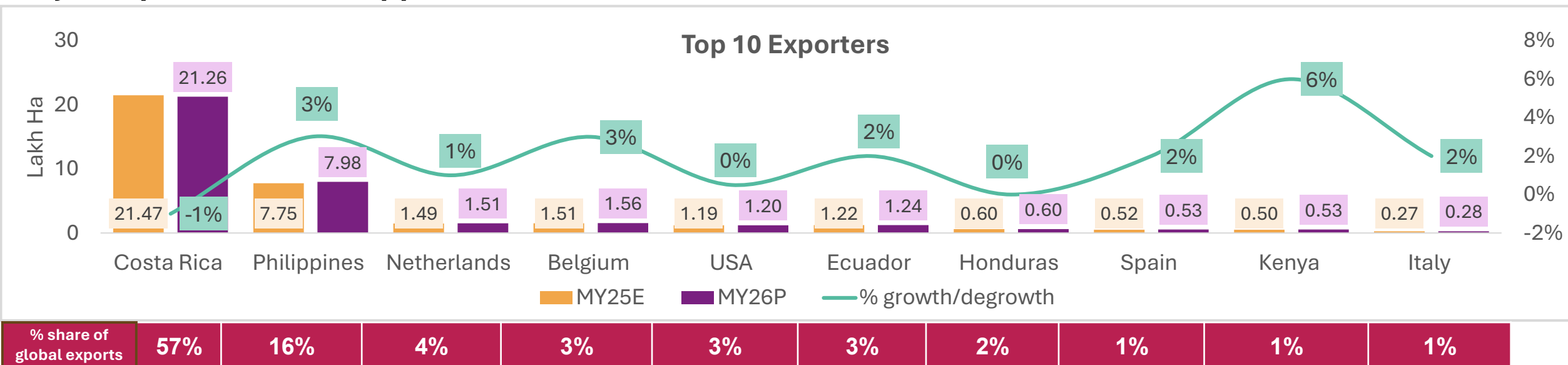
P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~70% of global pineapple production**, with production **estimated to moderately improve by 0-1% in MY26P**, driven by China, Indonesia, Mexico and Brazil.
- **Production is expected to decline in Costa Rica, primarily due to erratic climatic conditions affecting yields and crop cycles.**
- India’s production is projected to remain stable, supported by steady acreage and unchanged cultivation practices.
- **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

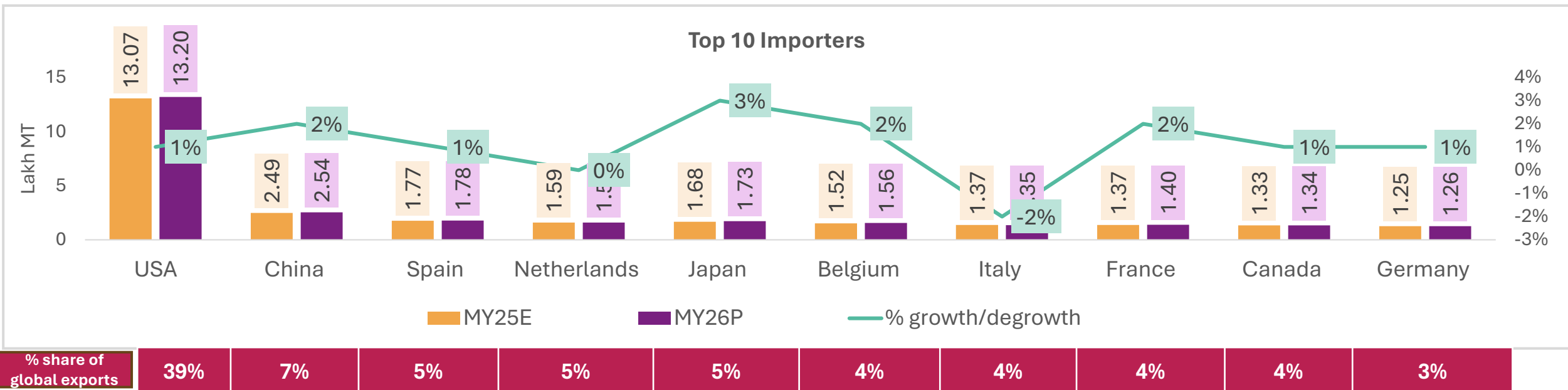
Major Exporters of Pineapple



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

- The countries in the chart account for ~92% of global exports. **Global exports in MY26P are expected to remain subdued**, driven by declining shipments from Costa Rica.
- In Costa Rica are expected to decline due to impact in production levels. Plantations in regions such as Río Cuarto and Sarapiquí report delays in planting, plant stress, and increased pest infestations. Lower availability is expected for 2026, which is already driving up international prices. In MY25, Costa Rica's shipments were heavily concentrated in the United States (54%), Belgium (12%), and Spain (8%).**
- Philippines' pineapple exports are estimated to grow in MY26P, building on a ~14% rise in MY25¹ to ~7,75,028 MT**, supported by strong demand from China, Japan, and South Korea and improved yield interventions. Growth to China was boosted by weather-linked declines in Chinese domestic production, increasing import reliance.
- Ecuador: Diversifying export portfolio to focus on tropical fruits like pineapple supported by demand from European union, US and Chile. Further plans to sign SECA with South Korea to boost exports as well.**
- Spain's pineapple exports are expected to grow by 2% in MY26P.** In MY25, shipments increased sharply to key markets such as Germany (+475%) Portugal (+47%), Italy (+38%), and Morocco (+37%), alongside record import throughput enabling higher volumes and stronger demand for premium-quality fruit.

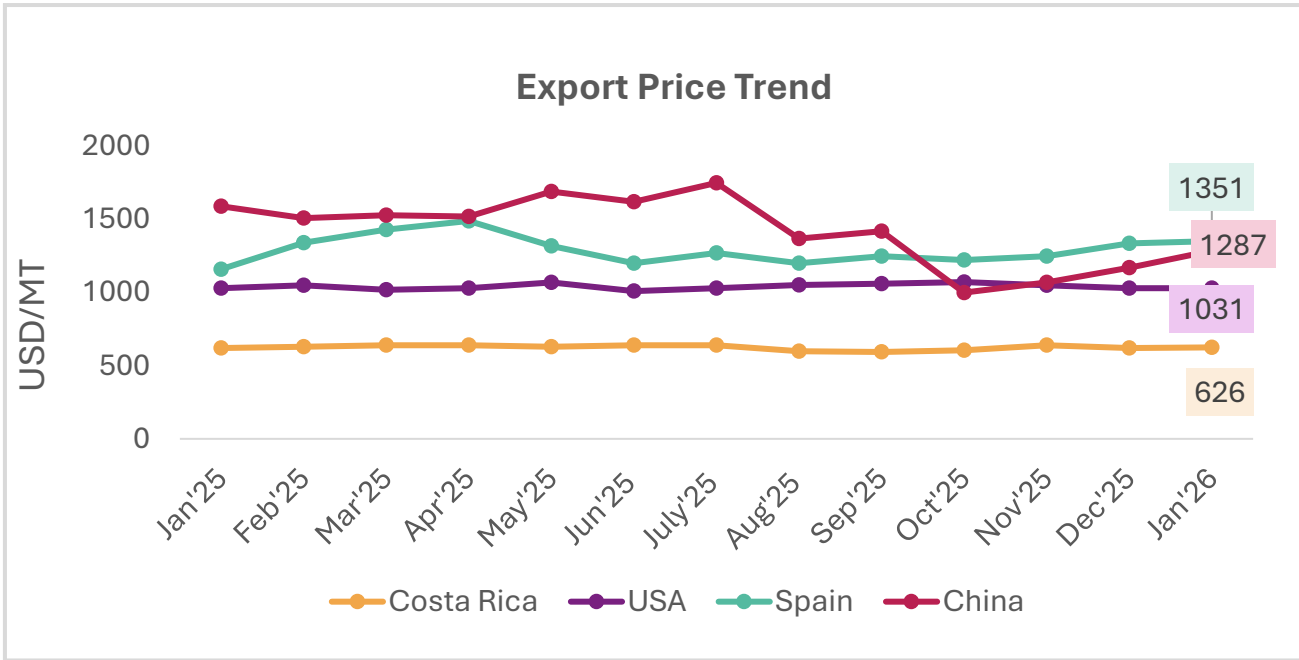
Major Importers of Pineapple



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

- U.S. Removal of the 15% tariff on Costa Rican pineapples has strengthened import growth in MY25, further reinforcing reliance on Costa Rica, which supplies around 90% of U.S. imports.** Import volumes are expected to remain firm in MY26 due to limited domestic production and steady consumer demand.
- France Imports remained constrained in MY25 due to high prices, tight availability, and logistical disruptions. The EU Mercosur trade deal is expected to gradually improve affordability of Latin American supply, supporting a recovery in imports in MY26.
- Japan Pineapple imports increased by around 7% YoY in MY25,** supported by stronger demand for processing and stable retail consumption. Imports are expected to remain resilient in MY26 despite currency pressures.
- China Imports rose by around 8% YoY in MY25,** driven by growing consumer demand and wider retail distribution. While stricter phytosanitary rules may cause near term frictions, **import growth is expected to remain positive in MY26 with improved quality assurance.**
- Italy Pineapple imports remained below last year's levels in MY25 due to subdued demand and lower arrivals from Costa Rica. Import volumes are expected to stay constrained in MY26, with only limited improvement despite seasonal demand support.

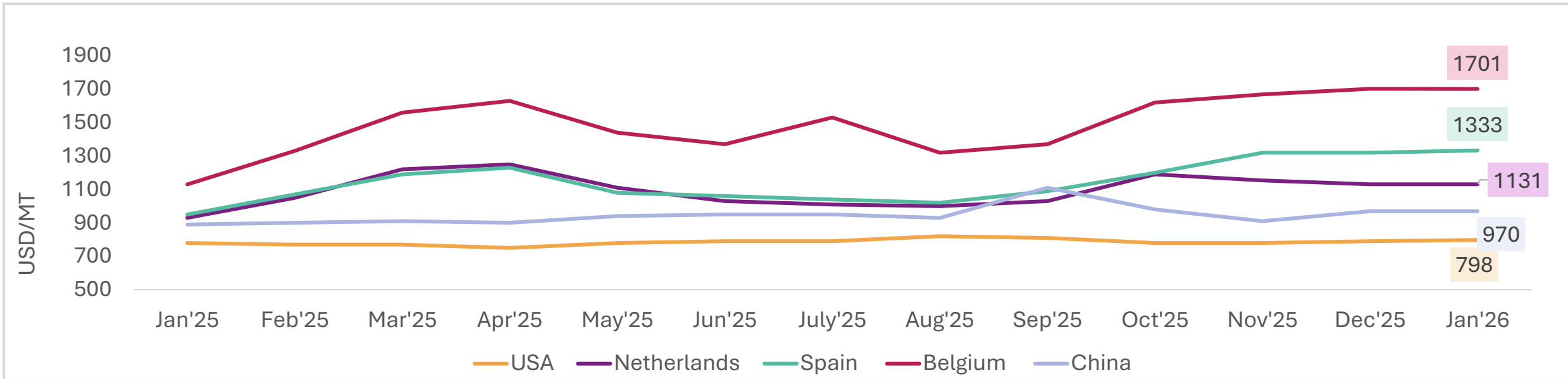
Price Trends and Outlook of Key Exporting Nations



Price outlook for next quarter (FMA)*					
Countries	Jan'26 Price (USD/MT)	Jan'25 Price (USD/MT)	%age change	Price direction	Price range
Costa Rica	626	620	1%	Bullish	620-660
USA	1031	1030	0%	Bullish	1040-1100
Spain	1351	1160	16%	Bullish	1430-1500
China	1287	1590	-19%	Bullish	1300-1450

- **In Costa Rica, current production projections indicate supply shortages, which are strengthening exporters’ negotiating positions and firming prices.** The country continues to **dominate global production of the MD2 Gold variety**, which remains the preferred pineapple due to its consistent flavor profile, disease resistance, shelf life, and quality compliance across key importing markets.
- **The U.S. removal of tariffs on Costa Rican pineapples—its source for nearly 90% of imports—reduces landed costs for importers and improves pricing flexibility,** supporting **broadly stable to slightly softer U.S. export prices in early 2026** rather than **year-on-year inflation.**
- In Spain, export prices remained firm in early 2026, supported by tight supply concentration from key origins and elevated import unit values. Import prices rose by ~16% year on year, reflecting stronger demand for premium-grade fruit, which is expected to keep export prices bullish through the next quarter.
- In China, export prices are expected to remain bullish in the next quarter, driven by rising processing demand and limited global supply availability. Structural growth in canned and prepared pineapple exports is supporting higher price realizations.

Price trends of Key Importing Nations



- United States import prices remain firm in January 2026, supported by sustained processing demand. While the removal of tariffs on Costa Rican pineapples may limit further upside, prices are unlikely to soften materially due to continued dependence on Costa Rica and limited alternate sourcing options.
- Key pineapple-exporting countries such as Costa Rica, the Netherlands, Thailand, and Honduras are encountering challenges in meeting trade contract commitments, driven by elevated input costs, stronger domestic demand, and unfavorable weather conditions.
- Netherlands import prices are holding at elevated levels in January, supported by strong re export demand within the EU and tight availability from Costa Rica. Logistical congestion at key EU ports is restricting spot supplies, keeping landed prices supported in the near term.
- Spain import prices remain firm in January, driven by steady retail demand and lower inflows from Latin America. Importers are increasingly prioritizing premium quality fruit, sustaining higher average prices despite muted volumes.
- **Global pineapple prices are expected to remain elevated throughout MY26P 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

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



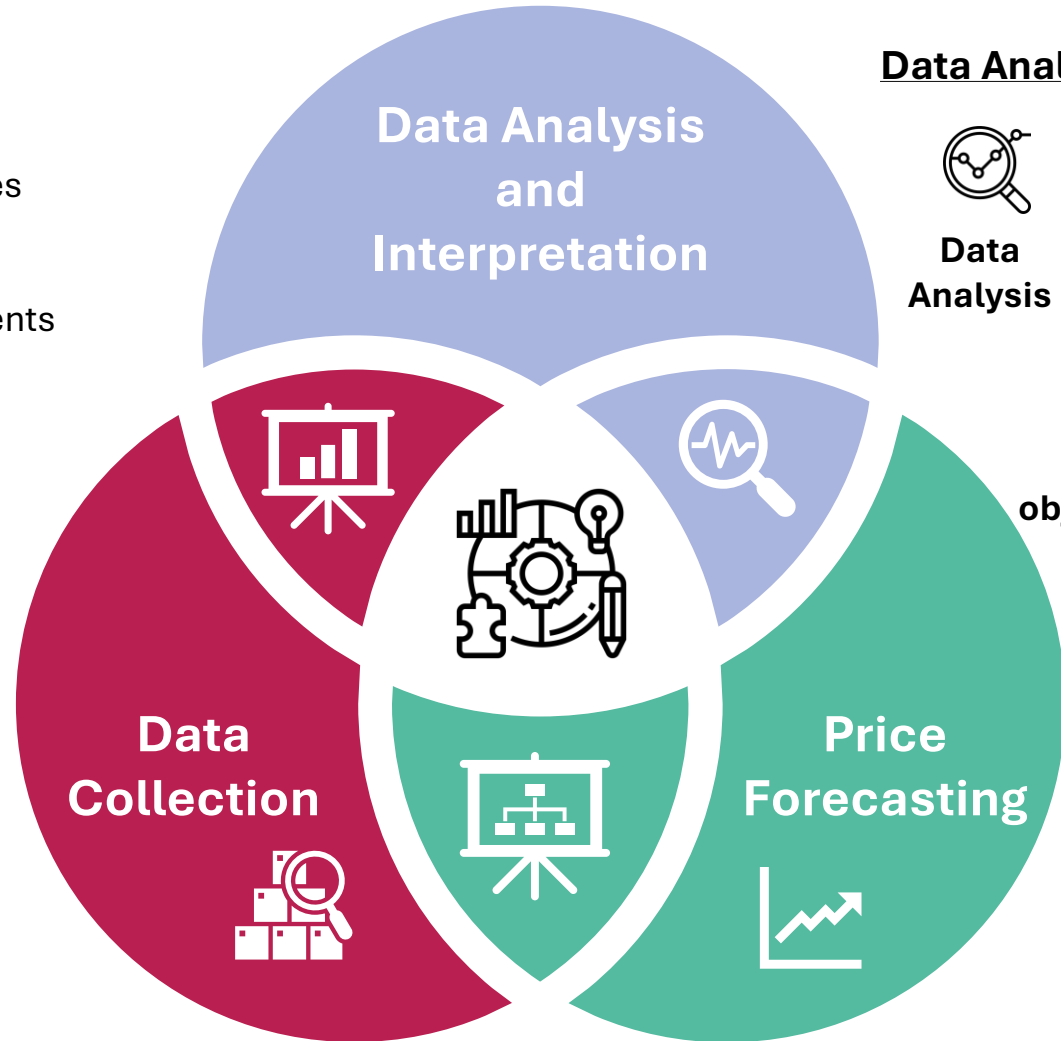
Sources

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



Policy Updates

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



Data Analysis and Interpretation



Data Analysis

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



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.