

Monthly dashboard – Pineapple

Aug-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												

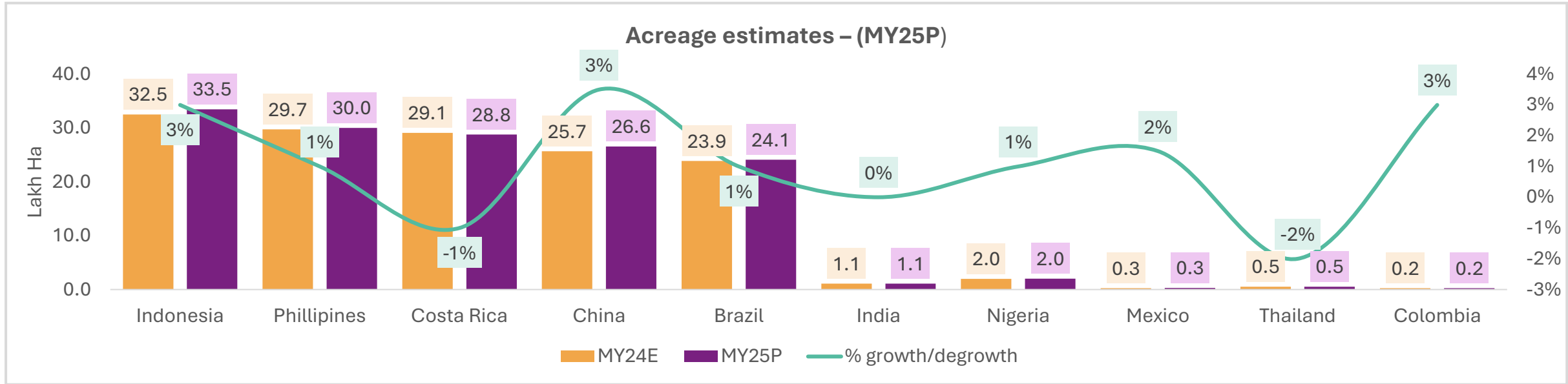
Lean season

Peak season

- Peak harvesting season for countries like Indonesia, Philippines, Costa Rica, China, Brazil, India, Nigeria, Mexico, Thailand and Colombia ranges between March and August.
- In Thailand pineapples are harvested during two main seasons - a summer crop from February to June and a winter crop from October to December.
- In countries like Indonesia, Costa Rica, Brazil, Mexico, India, Thailand and Colombia the pineapple supplies are available almost throughout the year, making them major global suppliers
- Costa Rica is the leading global producer and exporter of pineapple hybrid variety MD2 also known as golden pineapple, the most popular variety in the world. It has an almost uniform size, with a cylindrical appearance and an orange-yellow color. The interior is made up of a creamy-yellow color pulp, the pulp is aromatic with a crunchy and juicy consistency. The pineapple has high water content and is low in calories while being 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

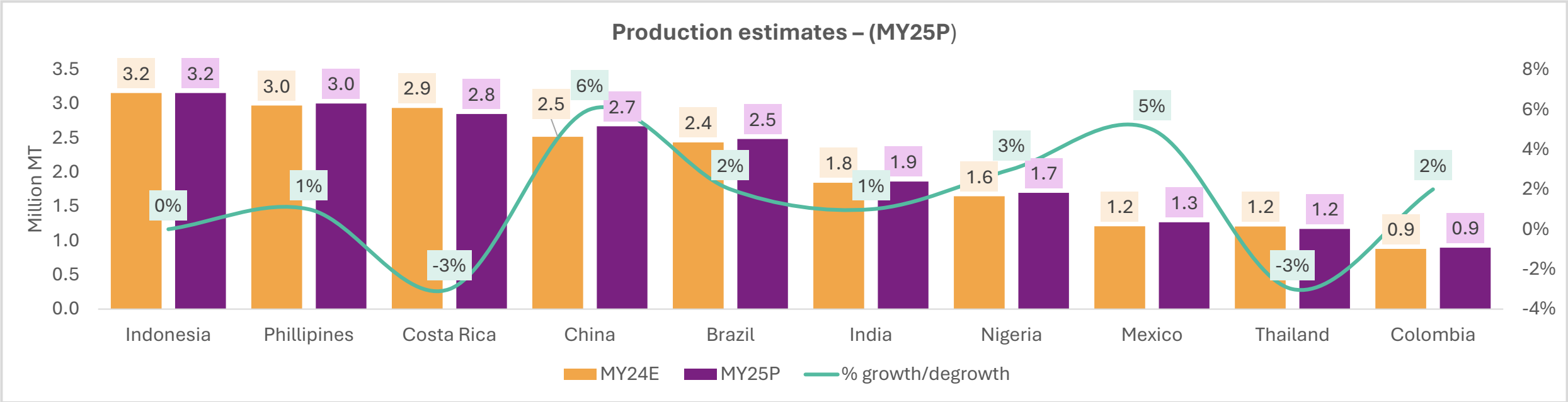
Acreage Estimates of Major Producing Countries



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

- The countries in the chart contributes to ~60% of global area. **For MY25P, global acreage is set to rise moderately by 0-1% YoY, led by Indonesia, China, Mexico, Colombia, Philippines, Brazil and Nigeria.**
- **Acreage expected to see downtrend in countries like Costa Rica** due to yield challenges led by erratic rainfall and temperature patterns in recent years while for India it is expected to remain stable on year. Extreme temperature conditions in **Thailand** as of 2024, along with lower acreages, have led to lower production levels. In the wake of this, 2025 is witnessing efforts to replant, but the overall **acreages are still expected to be moderately lower year-on-year** due to yield concerns
- **Acreage for pineapple in China is expected to improve** on year backed by rising export momentum (grew at CAGR of 70% (MY20-MY24) **as well as in Mexico** due to firm domestic prices making it a profitable crop with profitability over 11,000 USD/ hectare.¹
- Government impetus on pineapple cultivation in Brazil with introduction of “**Agricultural Zoning of Climate Risk**” wherein tool classifies risk levels associated with fruit development phases and categorizes available soil water classes, is expected to improve area under the crop in MY25P.
- Congenial temperature and rainfall conditions to boost acreages under tropical fruits including pineapple in Colombia for MY25P.

Production Estimates of Major Producing Countries



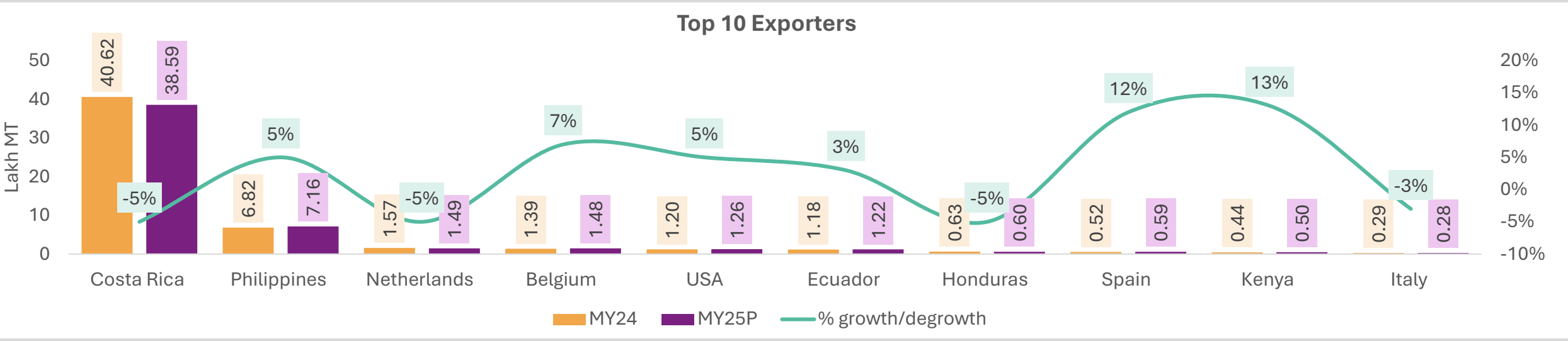
P – Projected value; MY – Marketing year (Jan-Dec)

- The countries in the chart **contributes to ~70% of global production**. The **production for MY25P is expected to moderately improve by 0-1%** led by China, Mexico, Nigeria, Brazil, Colombia, India and Philippines while countries like Costa Rica and Thailand is expected to witness downtrend in production.
- With growing demand of Philippine pineapple (MD2 varieties) in markets like China and Europe, production is expected to improve led by increased acreages in MY25P which will support pineapple industry in medium term.
- **Costa Rica witnessed erratic climatic conditions in MY25 marked by transition from El Nino to La Nina which is expected to lower production on year.. While in Thailand, severe drought and heatwaves, driven by the El Niño phenomenon to keep production lower on year.**
- **Production for Indonesia to remain at par** on year in 2025, with harvest weighing towards second half of the year. Despite experiencing some drought effects, Indonesia has managed to maintain stable pineapple production, largely thanks to initiatives like **vertically integrated plantations in regions like Lampung Province**.
- Key growing regions in China like Guangxi, Hainan, and Guangdong are witnessing higher output, supported by favorable weather conditions and improved cultivation techniques.
- **Production in Colombia is expected to rise followed by expanding area specifically under MD2 varieties** backed by growing domestic and global demand



Export trends and price outlook

Major Exporters of Pineapple

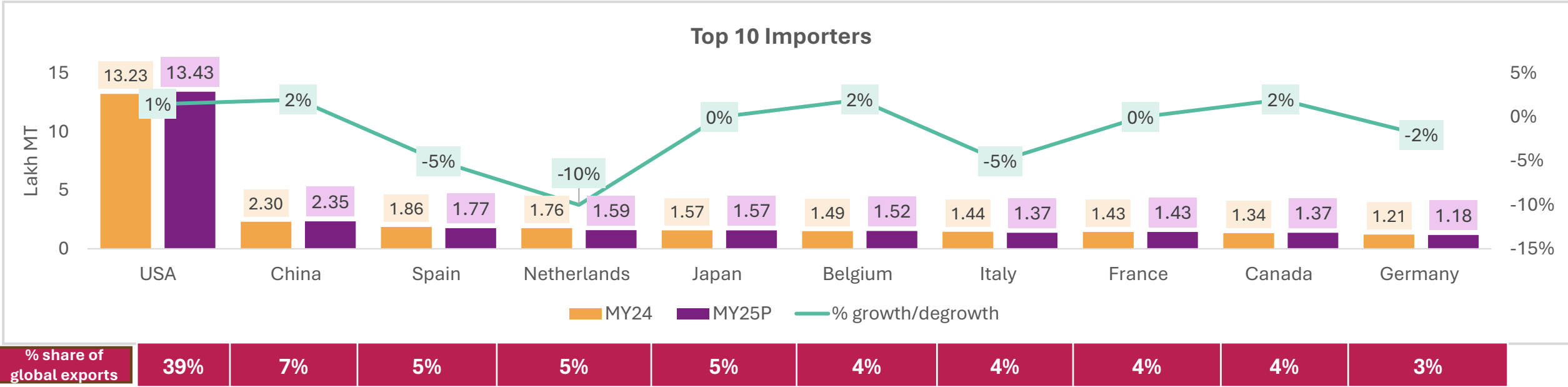


% share of global exports	71%	12%	3%	2%	2%	2%	1%	1%	1%	1%
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P – Projected value; MY – Marketing year (Jan-Dec)

- The countries above account for ~96% of global pineapple exports wherein Costa Rica is the largest exporter with ~70% of share in global export basket.
- Global pineapple exports in MY25P are projected to decline by around 2-3% year-on-year, primarily fueled by a significant decline in export volumes of Costa Rica, Netherlands and Honduras.**
- Costa Rican volumes is expected to see a downtrend in MY25 due to impacted production levels. **In wake of this, Costa Rica’s National Chamber of Pineapple Producers and Exporters CANAPEP have introduced a voluntary sustainability certification for pineapple growers.** The move aims to ensure adherence to socio-environmental standards and enhance transparency in international market.
- Indian government initiated promoting Tripura’s “Queen” pineapple as a global brand** (branding, tech integration, post-harvest reduction, and plans for staggered planting over ~2,000 ha initially) as well as planning PPP fruit-processing units to support farmers and reduce post-harvest losses to support exports.
- Philippines have witnessed strong export growth in 2024 (~14% higher YoY), and the **momentum is expected to increase in MY25** backed by growing demand of MD2 varieties in China. Another key market witnessing traction is Japan and South Korea. **According to projections from the OECD and FAO, by 2033, one in every four pineapples grown in the Philippines will be exported.**
- Ecuador's strategic focus on other tropical fruits than banana to diversify their exporting portfolio backed by congenial weather conditions to keep exports higher on year in MY25P.

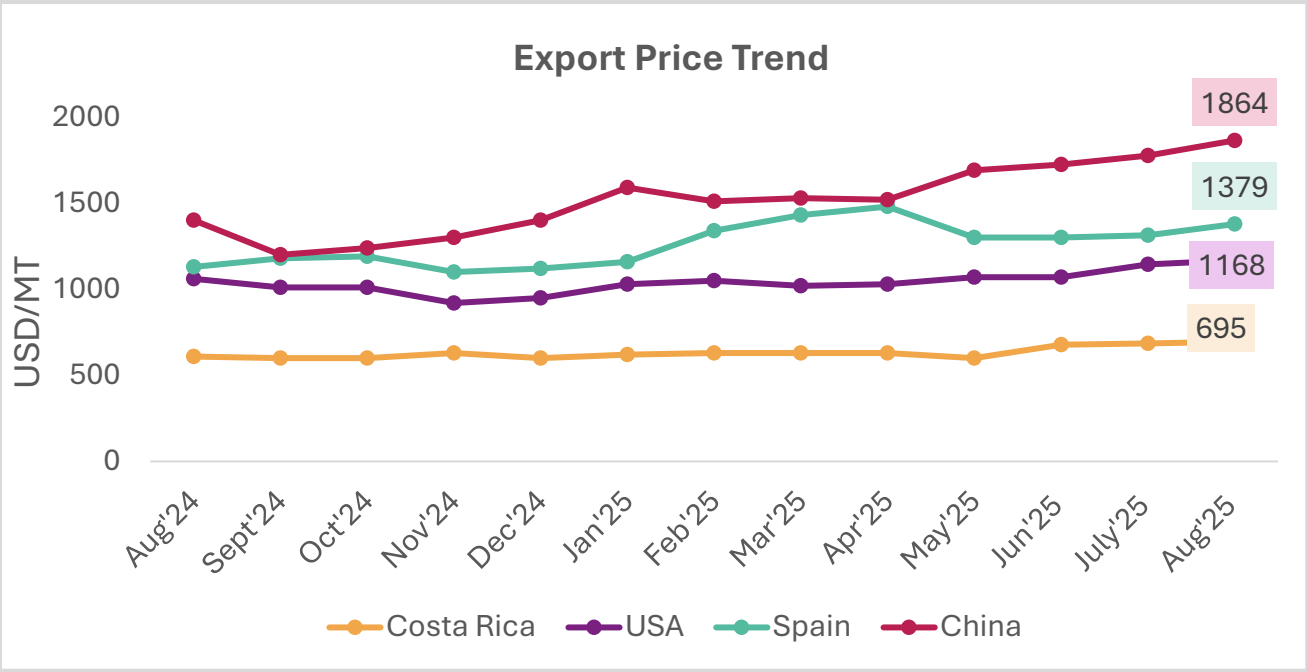
Major Importers of Pineapple



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

- The countries in the chart **account for ~81% of global pineapple imports.**
- U.S. puts tariff of ~15% on Costa Rican pineapple which contributes ~90% share in the total import basket. The hike in import duty is expected to lower the import momentum however rising demand without comfortable domestic production to offset any significant decline in imports.
- After the ban of 2019, Chinese government announced (Nov 2024) allowance of imports from Myanmar that meet stipulated phytosanitary requirements which is expected to keep imports volume elevated on year. Previously, Myanmar pineapples were exported to China in large volumes through a duty-free border trade scheme and hence a ban was a significant blow to their pineapple industry.
- In France, the start of 2025 has witnessed high import prices amidst tight supplies which is expected to be further aggravated by logistical issues and is expected to keep imports lower on year in MY25.
- Most of the pineapple supply in Germany, Italy, Spain and Netherland originates from Costa Rica wherein production is estimated to be impacted against high demand which is to keep imports lower on year for these importing countries.
- Shift to other exporting geographies than Costa Rica may be witnessed however amid high demand, global pineapple supply is expected to be impacted.
- Imports of pineapple have remained stable in Japan past four to five years. This is largely due to weakening yen which has impacted all major fruit categories except kiwi wherein the demand remain intact.

Price Trends and Outlook of Key Exporting Nations



Price outlook for next quarter (SON)					
Countries	Aug'25 Price (USD/MT)	Aug'24 Price (USD/MT)	%age c hange	Price direction	Average pri ce range for SON (USD/MT)
Costa Rica	695	610	14%	Bullish	700-710
USA	1168	1060	10%	Bullish	1170-1180
Spain	1379	1130	22%	Sideways	1375-1385
China	1864	1400	33%	Sideways	1860-1870

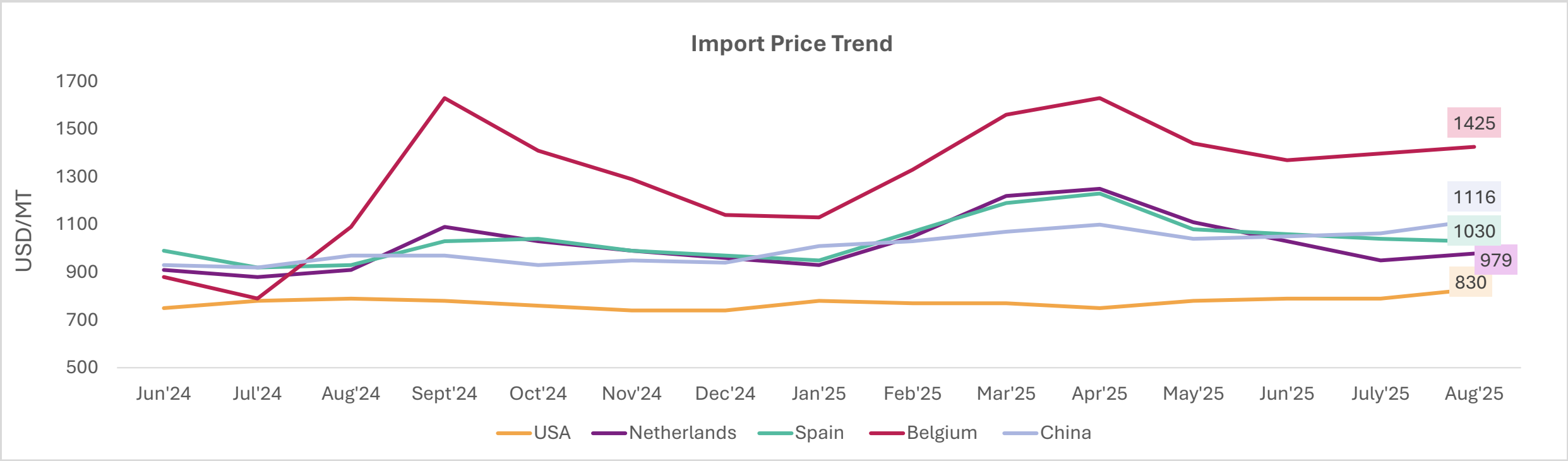
- Costa Rica** export prices remained low since early 2024. **Prices saw an uptick June’ 25 onwards** as natural bloom remained weak due to end of season and heavy rainfall led reduced yields, with buyers also reporting concerns over coloration patches. Available fruit sizes were mainly 8, 9, and 10¹, indicating smaller calibers compared to premium grades. With supply estimated to be low tin Aug’25, the **outlook is bullish, and prices are expected to firm up to \$700–710/MT in the coming months.**
- Export prices in USA** were elevated in August 2025 and is expected to remained stable to slightly firmer due to tight supplies in market in MY25 over production concerns in central American countries. Spain prices also remained firm to slightly elevated, dependence on multiple origin have safeguard European countries against unusual spikes
- 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)
- China’s** canned pineapple production has witnessed a robust demand driven by increased investment in fruit processing facilities and advancements in agricultural practices. The country is positioning 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 **support prices.**

Note Price forecasting is based on the fundamental analysis. SON stand for September , October and November, Above prices are FOB prices. CAGR mentioned for the time period : MY20-MY25

Source: Crisil Intelligence & ITC trade map

1. No of pineapple/boxes

Price trends of Key Importing Nations



- **Key importing countries are witnessing elevated prices due to strong demand from processing and fresh segments amidst tight supplies.** A key driver behind these market shifts is the **global shortage of orange juice, which has intensified industrial demand for pineapple.** Smaller pineapples, previously channeled into IQF or export markets, are being **redirected toward juice production** in key importing countries, creating supply gaps for processors and exporters alike.
- **USA and China have witnessed elevated prices in August 2025** led by tight supplies in key exporting countries while for European countries like Spain and Belgium the inch up have been relatively low due to wide range of suppliers.
- **In Netherland,** amidst delayed and tight supplies, supermarkets and processing plants are facing supply shortages, hence **prices to remain firm.**
- Despite **relatively stable logistics,** several key pineapple-exporting countries including Costa Rica, the Netherlands, Thailand and Honduras are facing challenges in fulfilling existing trade contracts. **This is driven by a combination of high input costs, rising domestic demand, and adverse weather conditions** such as erratic rainfall and temperature fluctuations, which are impacting yields in major producing regions like Costa Rica and Thailand. As a result, **global pineapple prices remain elevated, and this high-price environment is expected to persist, potentially through 2026.**

Way Forward for Indian Pineapple Exports

Leveraging FTA with United Kingdom

- In 2024, the UK having a ~5% share in global pineapple import basket imported around 112,000 tonnes of pineapples worth USD 94 million, supplied mainly by Costa Rica and the Philippines, while India's share remained negligible.
- Until now, Indian pineapples faced a 4% import duty in the UK, which has been reduced to zero under the India–UK FTA, representing a clear under-penetrated opportunity for India.
- To leverage this opening, India should focus on strengthening supply chains, ensuring quality consistency, and developing robust cold-chain and shipping infrastructure to address perishability challenges.
- Export competitiveness can also be enhanced through value-added formats (canned, juices, dried pineapple), which reduce risks linked to fresh exports and expand shelf life.
- Branding India's pineapples as naturally sweet, sustainably grown, and high-quality will help differentiate them from Latin American supplies, creating scope for penetration in both mainstream UK retail and niche ethnic segments.
- Additionally, specialty varieties from regions like the Northeast, such as the GI-tagged Tripura Queen, can be selectively promoted in the UK as premium, heritage-driven offerings, strengthening India's overall positioning in the high-value segment



Canada, Israel and Japan are another potential markets for Indian Pineapple exports

- **Canada** is a significant importer of pineapples, accounting for around 4% of global imports, with a steady demand growth of around 4% over the past 5 years. Despite regulatory approval in 2018, India has had limited presence in the Canadian market due to phytosanitary concerns. However, Canadian buyers are open to new varieties and origins, as seen by the growing popularity of Colombian pineapples. This presents an opportunity for India to tap into the Canadian market, potentially by offering new and diverse pineapple varieties that meet the country's phytosanitary standards.
- **Israel** has registered growth in import volumes at a CAGR of ~26% wherein in 2025 India requested India-Israel market for ten agricultural commodities including pineapple as part of broad agriculture cooperation agenda. Once access is formalized, India can tap Israel which is a growing market with robust retail demand.
- **Japan** and India are already linked with via Comprehensive Economic Partnership (2011) wherein Japan holds a ~5% share in global import basket and remains a high value market. India can tap the market wherein India has failed to leveraged due to strict SPS and MRL standards globally.



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.

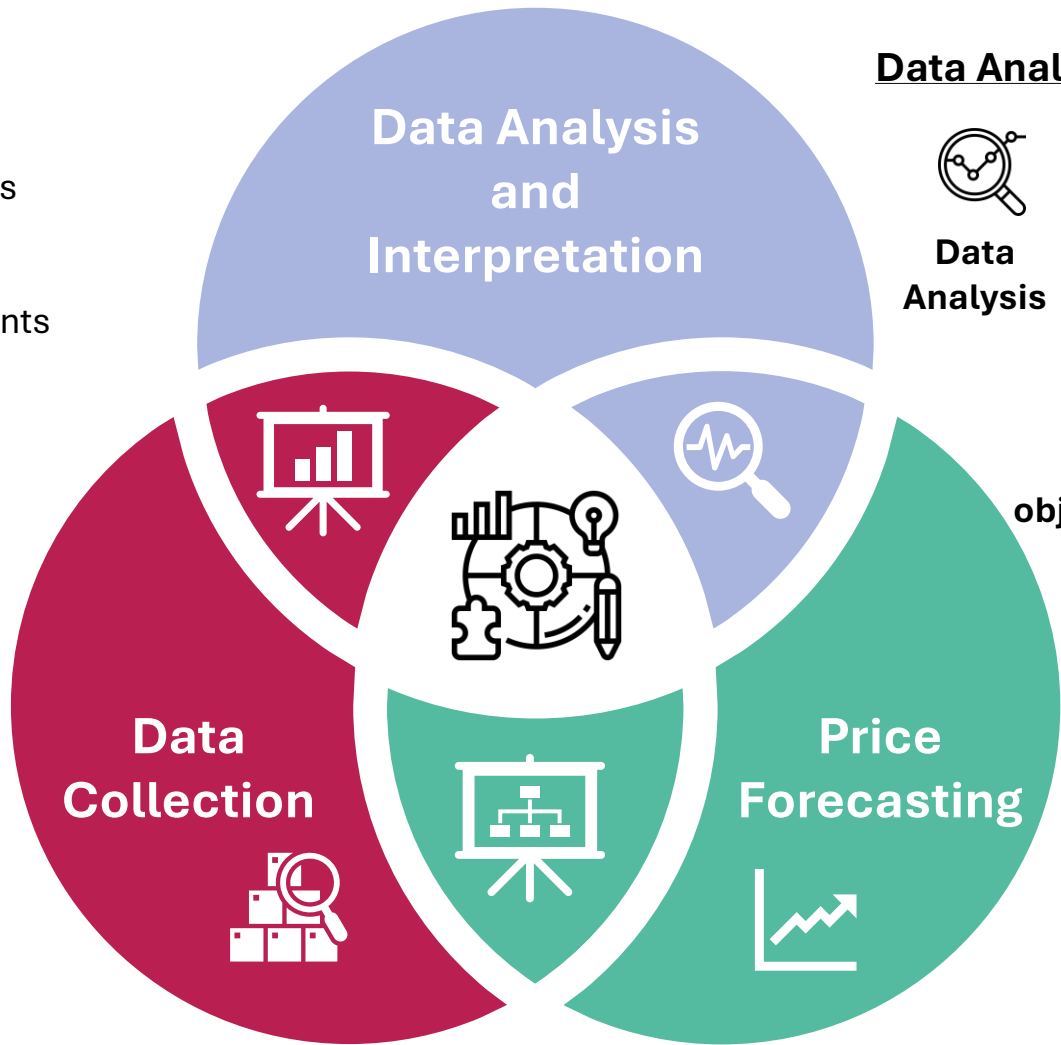
Data Collection

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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.