Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard – Pineapple

Nov-2025

Acreage and production trends

Pineapple crop calendar of major producing countries

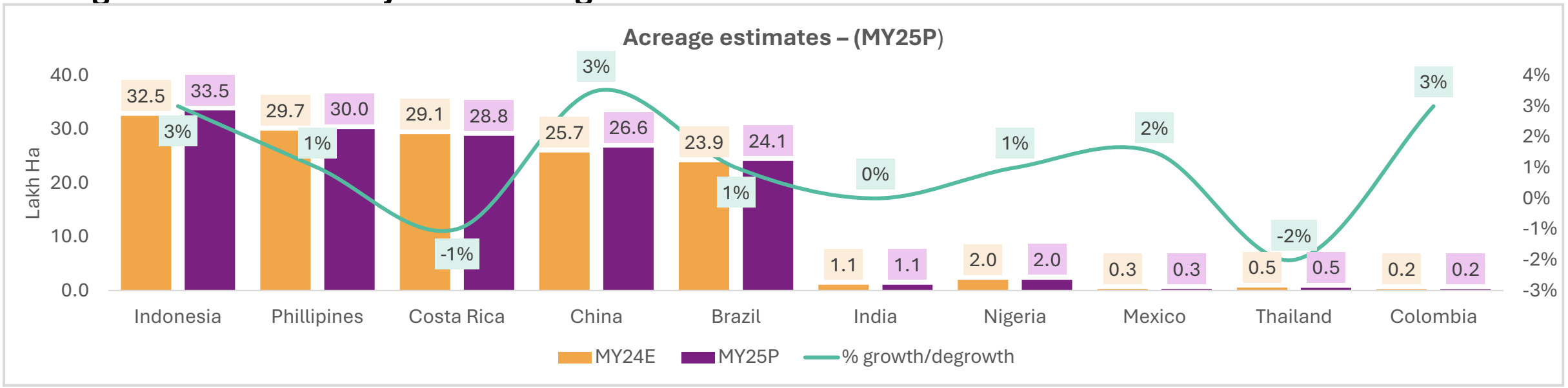
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Indonesia												
Phillipines												
Costa Rica												
China												
Brazil												
India												
Nigeria												
Mexico												
Thailand												
Colombia												

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 April to July 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

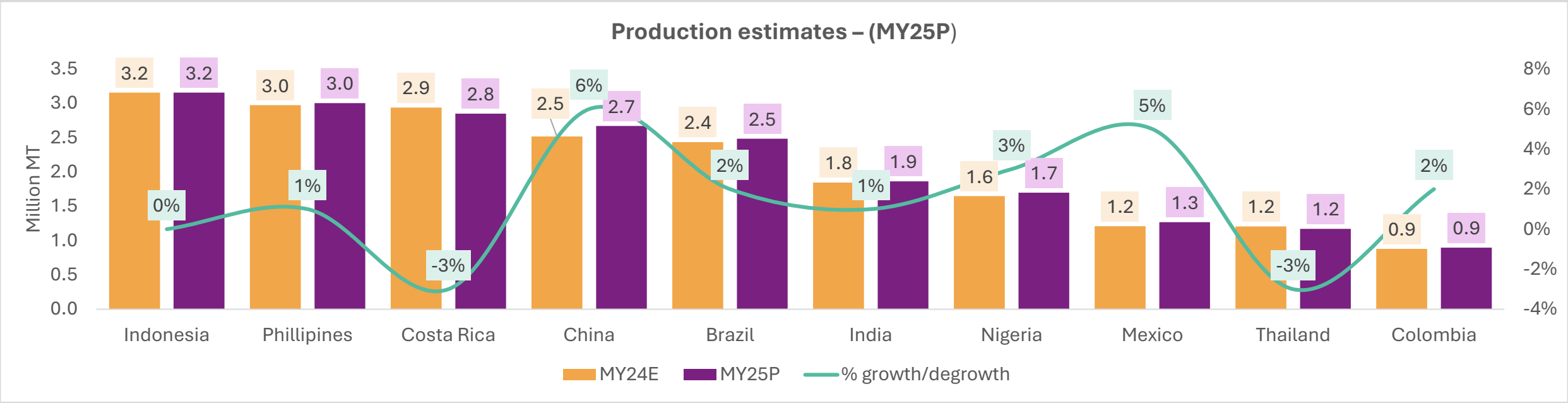


P – Projected value; MY – Marketing year (Jan-Dec)

- 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

Source 1. SIAP, CRISIL Intelligence

Production Estimates of Major Producing Countries

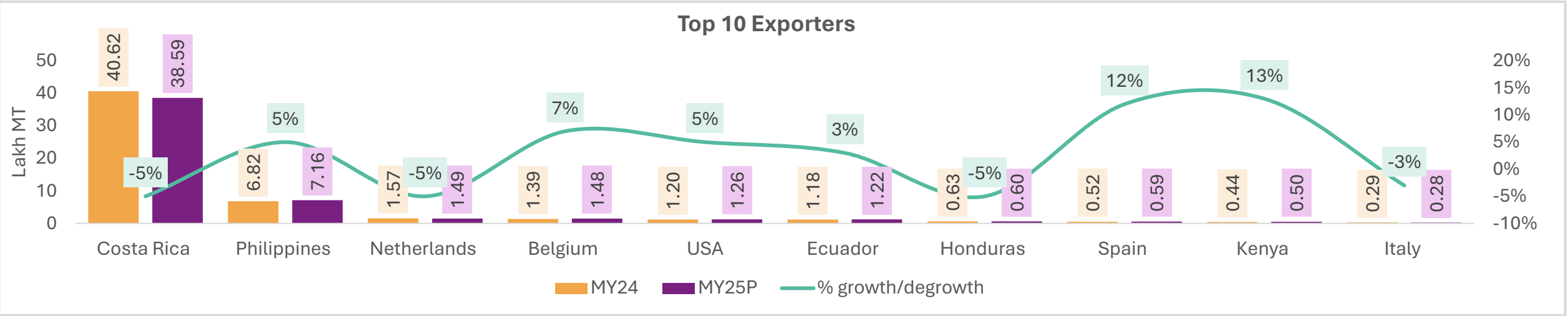


P – Projected value; MY – Marketing year (Jan-Dec)

- 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



% share of global exports	71%	12%	3%	2%	2%	2%	1%	1%	1%	1%

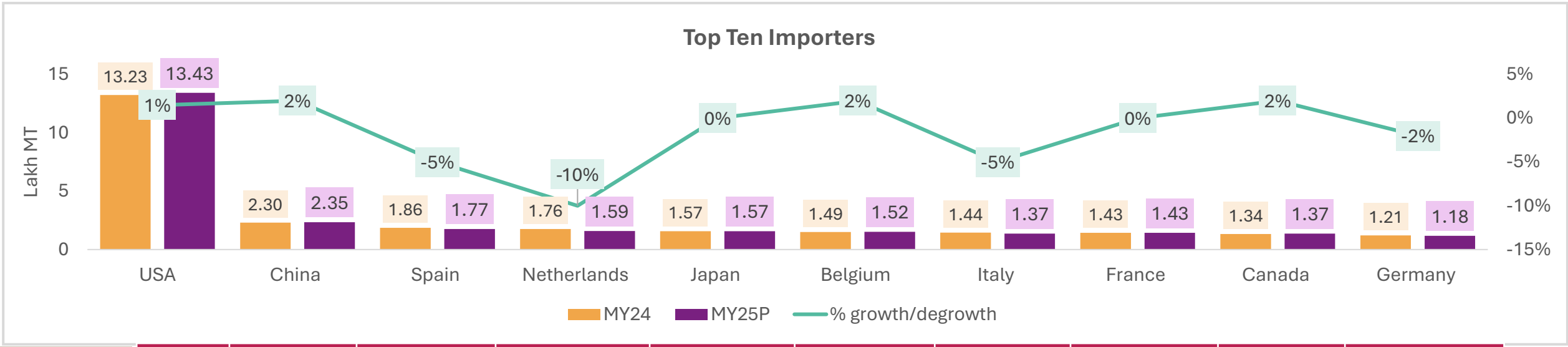
P – Projected value; MY – Marketing year (Jan-Dec)

- 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** backed by excess rainfall and record high temperatures**. 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.**
- **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 supported by demand from European union, US and Chile. Further plans to sign SECA with South Korea** to boost exports as well.
- **Italy's** pineapple exports **declined** by **3%**, driven by **higher domestic absorption**, **retail prioritization** due to **better local price realization**, and **logistics** and **cost pressures**, which together constrained exportable volumes despite steady demand in key markets.
- **Belgium's** pineapple exports **increased by ~7%** in 2025, supported by its role as a key **European re-export hub**, with **efficient port logistics** and **stronger intra-EU redistribution demand** enabling higher shipment volumes to neighboring markets.

Major Importers of Pineapple

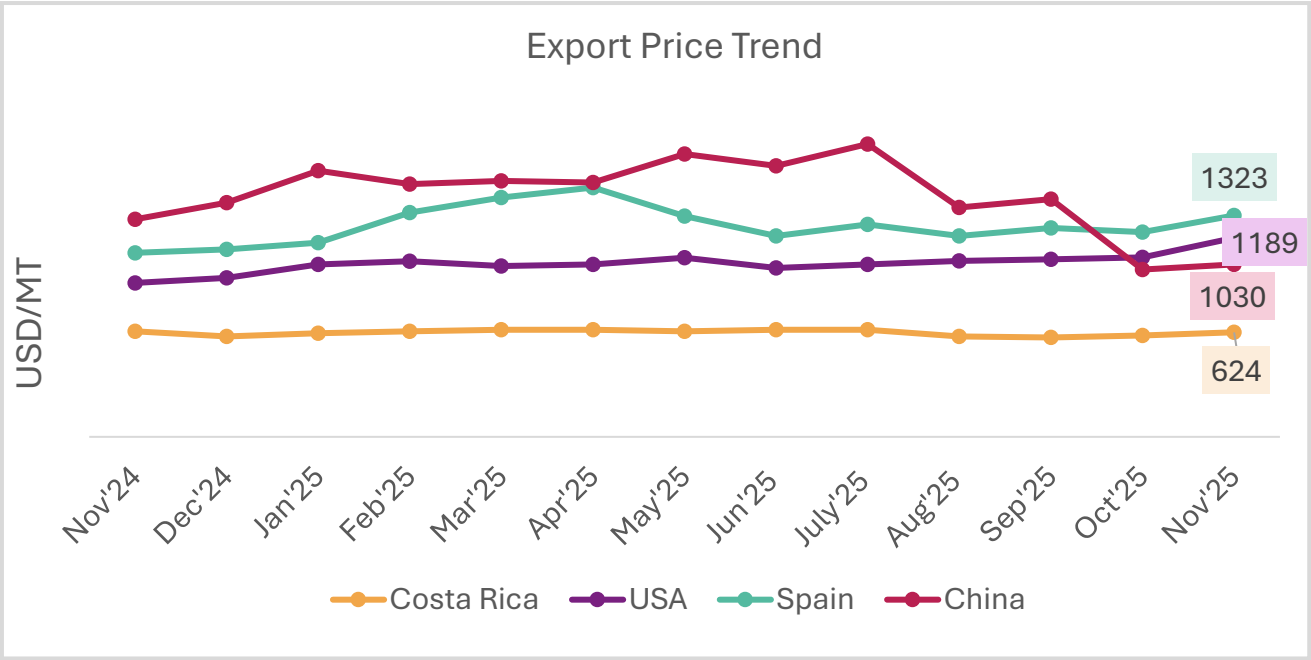


% share of global imports	39%	7%	5%	5%	5%	4%	4%	4%	4%	3%

- **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.
- **France: High import prices and tight supplies in 2025**, exacerbated by logistical issues, expected to keep imports lower on year. October'25 witnessed low demand which is expected to recover towards November.
- **Germany, Spain, and Netherlands: Imports** are expected to **decline** due to **lower production** in **Costa Rica**, with sourcing **likely shifting to other regions**. There's also a move towards **crownless pineapples** to reduce transport volumes.
- **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:** Higher stock in market wherein some older stock are also currently present in market against low demand from the importing countries have kept imports subdued.
- **Italy** : Subdued demand and **reduced arrivals** from **Costa Rica** have kept imports **below** last year's levels. In **October'25**, persistent **weak demand** and **logistical delays** further dampened market activity. However, demand is anticipated to **strengthen** from **December onwards**, potentially reviving import momentum.

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

Price Trends and Outlook of Key Exporting Nations

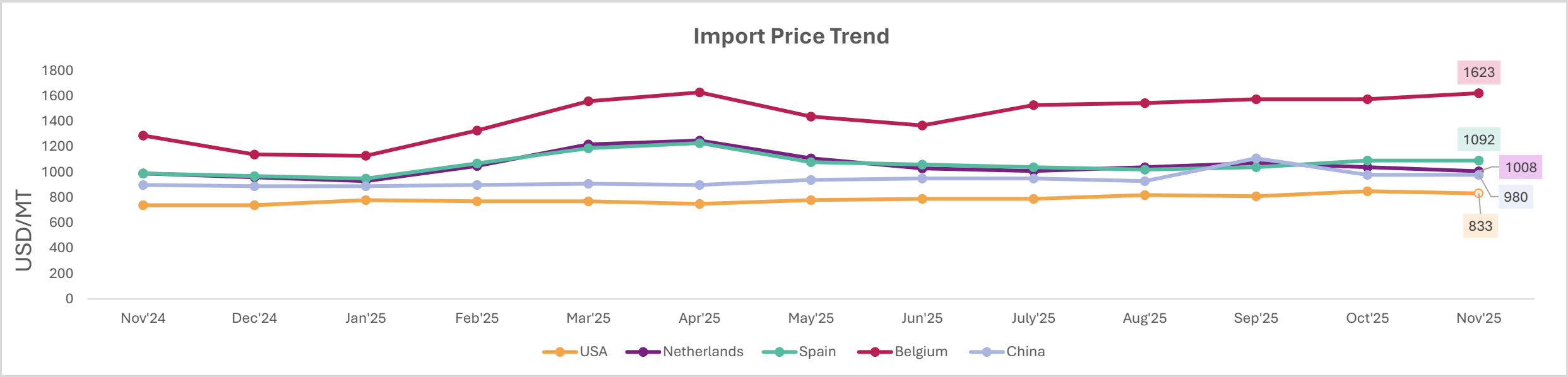


Price outlook for next quarter (DJF)					
Countries	**Nov'25 Price (USD/MT)**	**Nov'24 Price (USD/MT)**	**%age change**	**Price direction**	**Average price range for DJF (USD/MT)**
Costa Rica	624	630	**-1%**	**Bullish**	620-660
USA	1189	920	**29%**	**Bullish**	1210-1310
Spain	1323	1100	**20%**	**Bullish**	1390-1490
China	1030	1300	**-21%**	**Bullish**	1000-1300

- **Costa Rica :** Despite low supply in Aug–Sep'25, prices were bearish due to weak demand and Ecuadorian competition. Storms and US tariffs in Oct curbed exports, lifting prices 1–2% YoY. Prices are set to rise marginally in November with a price correction.
- **U.S. pineapple** export prices **rise by ~11%** from **Oct to Nov 2025**, driven by **tight global supply** from key origins such as **Costa Rica** and the **Philippines**, **weather-related production constraints**, and **increased diversion of fruit toward juice** and **processing demand**, which has **reduced exportable availability** and **supported higher price realization**.
- Pineapple supply in the **Spanish market** was impacted all year by Costa Rica's production. Natural flowering in summer led to a temporary oversupply and lower prices. Post-summer, reduced volumes stabilized the market, but October and early November saw slow activity with slightly higher supply and subdued demand. Prices are expected to firm from December as retailers restock for Christmas.
- **China's pineapple** export prices softened in August due to increased domestic arrivals and stock clearance, rebounded in September, but dropped sharply in October with peak harvests boosting supply and competition. Prices are expected to remain firm and stable from November to February as supply tightens and inventories normalize.

Source: Crisil Intelligence & ITC trade map
Note : Price forecasting is based on the fundamental analysis. DJF stand for December, January '26, and February'26 . 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.
- **USA:** Pineapple import prices often ease from October to November as late season harvests in key origins increase seasonal supply, especially from Costa Rica and Panama, leading to greater availability and downward pressure on FOB offers, coupled with weaker post holiday domestic demand before year end festivities.
- 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.
- **Netherlands:** Import prices **soften** from **October to November** due to a **temporary oversupply** of **larger fruit sizes** and **slower consumption** after **peak demand** months, which creates excess inventory against subdued buying interest, prompting importers to **lower prices to clear stocks**.
- **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

Source: Crisil Intelligence & ITC trade map

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.

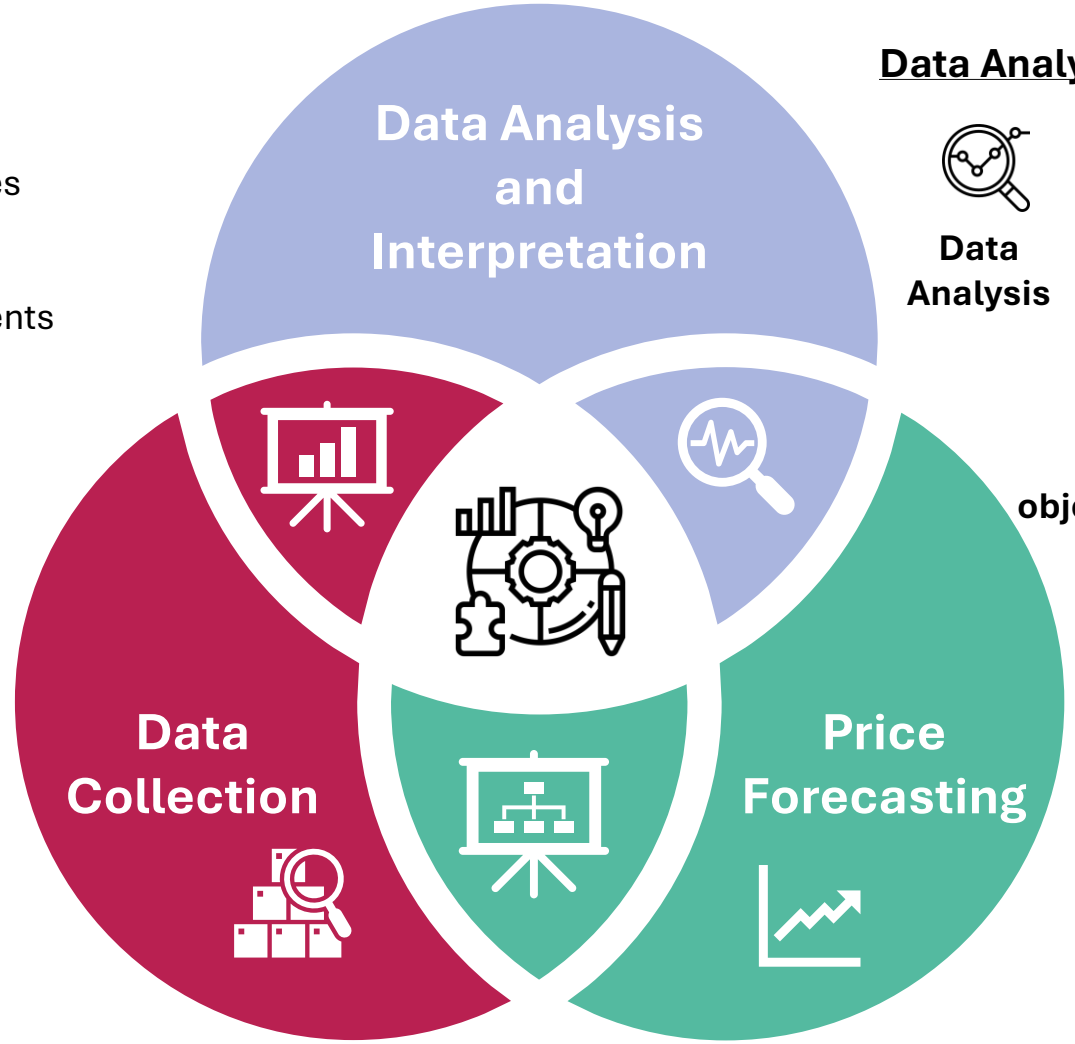
Data Collection

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.