

# Crisil

a company of **S&P Global**



# Monthly dashboard Pineapple

HS code: 080430

**Feb 2026**



# **Acreage and production trends**



# Pineapple crop calendar of top 10 producing countries

Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Costa Rica												
Philippines												
Indonesia <sup>1</sup>												
China												
Brazil												
India <sup>2</sup>												
Nigeria												
Mexico												
Thailand												
Colombia												

Lean season  Peak season 

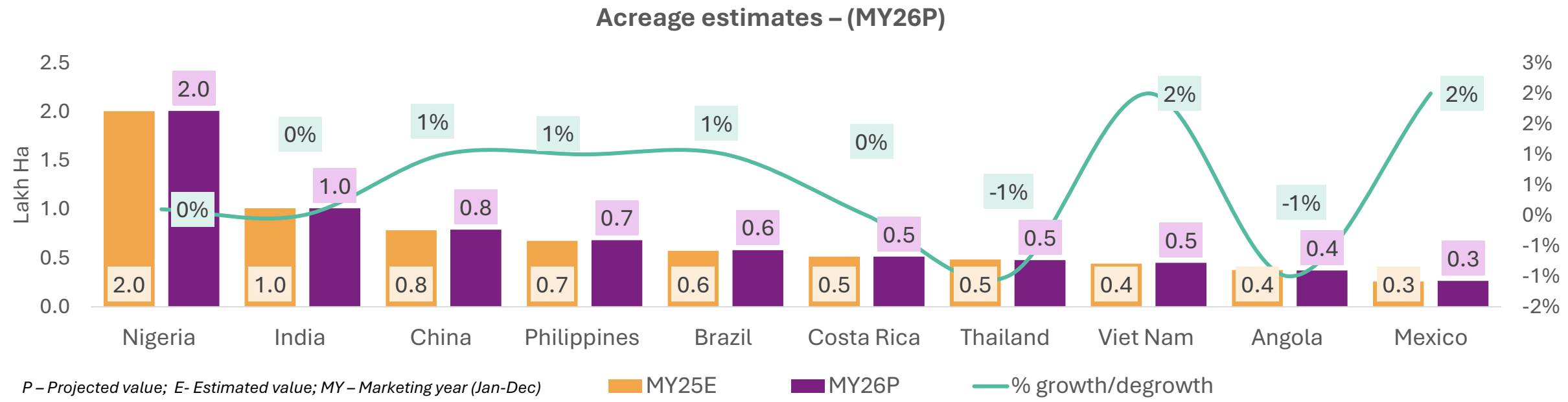
- The peak harvesting season for many pineapple-producing countries, including Indonesia, Philippines, Costa Rica, China, Brazil, India, Nigeria, Mexico, Thailand, and Colombia, is between March and August.
- Thailand has two main pineapple harvesting seasons: a summer season from April to July and a 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:** Marketing year is considered as Jan-Dec

Source: 1. [Kingstar Foods](#)

Source: 2 NHB

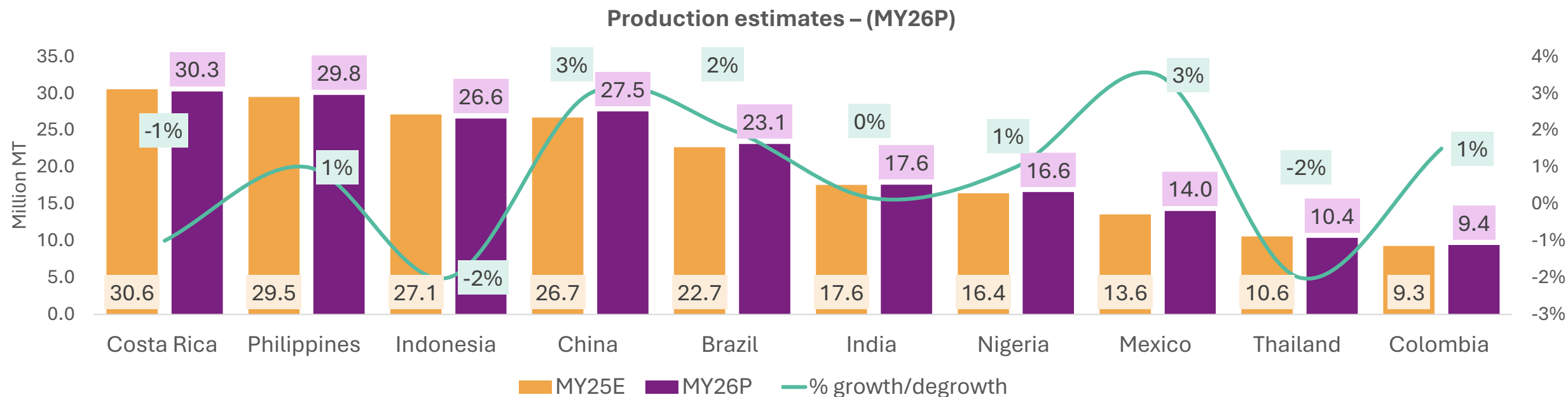
# Acreage Estimates of Major Producing Countries



- The countries in the chart **account for ~70% of global pineapple area**, with global acreage **estimated to rise moderately by 0-1% YoY** in MY26P, driven by China, Mexico, Vietnam, Philippines, and Brazil.
- **Acreage in Costa Rica is expected to remain stable**, as unstable weather patterns and temperature variability present significant yield challenges.
- **Acreage is expected to remain stable in India in MY2026**, while countries like **China, is likely to witness improved acreage** due to rising export momentum and profitability.
- **Brazil's pineapple acreage** is poised to grow, driven by government initiatives like "Agricultural Zoning of Climate Risk", which aim to enhance cultivation conditions and support the industry.
- Colombia, to see boosted acreages due to favorable temperature and rainfall conditions.

*Source: Acreage for MY2025E and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT  
India's acreage referred from MoA&FW and projection based on trends and interactions*

# Production Estimates of Major Producing Countries



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

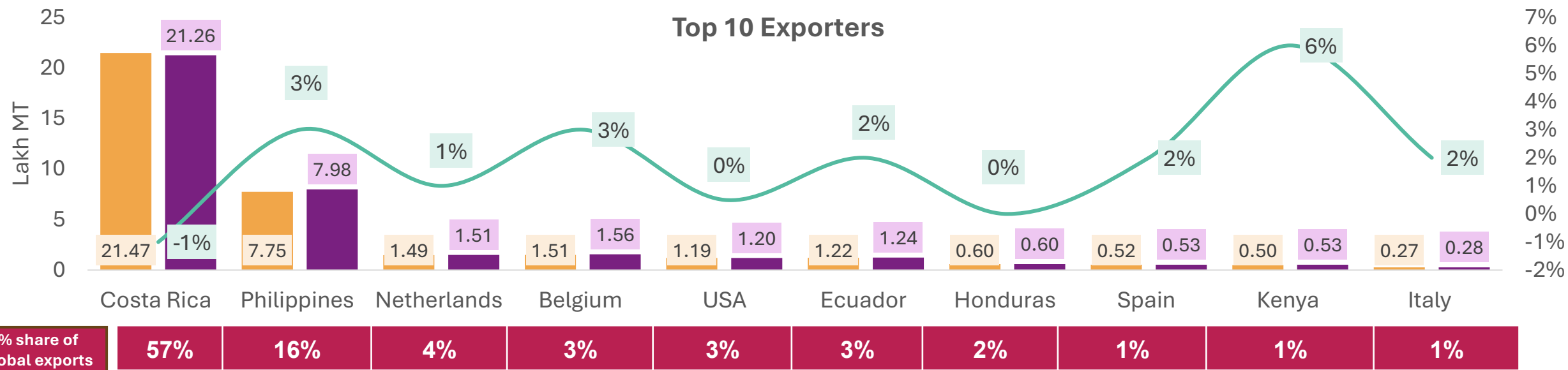
- The countries in the chart account for **~70% of global pineapple production**, with production estimated to moderately improve by 0-1% in MY26P, driven by Philippines, China, Brazil, Nigeria, and Mexico.
- **Production is expected to decline in Costa Rica**, primarily due to erratic climatic conditions 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

Source: Production for MY2025E and MY2026P is estimated and projected, respectively, based on historical trends from FAOSTAT  
 India’s production referred from MoA&FW and projection based on trends and interactions



# **Export trends and price outlook**

# Major Exporters of Pineapple



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

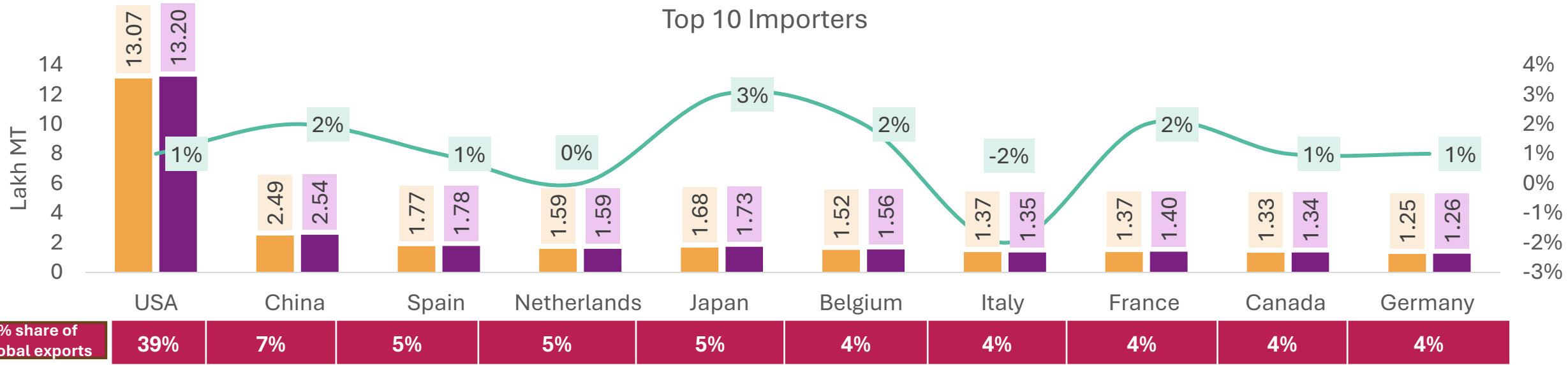
MY25E MY26P % growth/degrowth

- 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.
- **Costa Rica's pineapple production** is expected to **decline** due to planting delays, plant stress, and increased pest infestations in regions like Río Cuarto and Sarapiquí. This will lead to lower availability in 2026, driving up international prices. In MY25, Costa Rica's shipments were mainly destined for the US (54%), Belgium (12%), and Spain (8%).
- **Philippines'1 pineapple** exports are projected to increase in MY26P, following a **~14% rise** in MY25 to **~775,028 MT**. This growth is driven by strong demand from **China, Japan, and South Korea**, as well as **improved yields**.
- **Spain's pineapple exports** are expected to **grow 2% in MY26P**, driven by strong demand for premium-quality fruit. In MY25, shipments surged to key markets like Germany, Portugal, Italy, and Morocco, fueled by record import volumes and robust demand.

Source: MY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & export trends. HS code 080430

Source1: [Freshplaza](#)

# Major Importers of Pineapple



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

MY25E

MY26P

% growth/degrowth

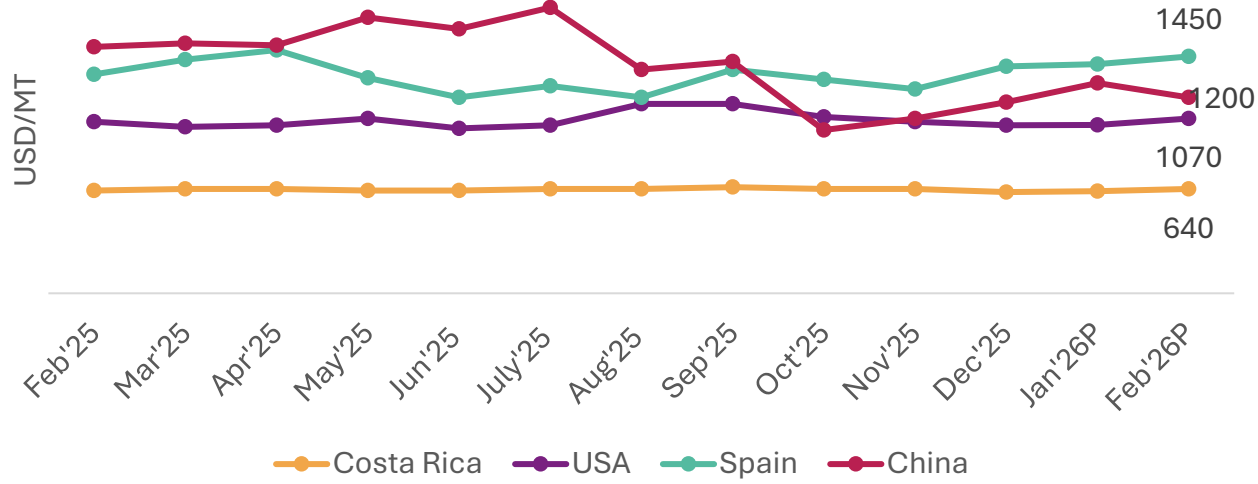
- **US:** Costa Rican pineapple imports surged in MY25 after a 15% tariff removal and are expected to remain strong in MY26 due to limited domestic production and steady demand.
- **France:** Imports were limited in MY25 due to high prices and logistical issues, but the EU-Mercosur trade agreement may boost imports in MY26.
- **Japan<sup>1</sup>:** Pineapple imports rose 7-8% in MY25, driven by processing and retail demand, and are expected to remain robust in MY26.
- **China:** Imports grew 8% in MY25, fueled by consumer demand and wider distribution, and are expected to stay positive in MY26 despite stricter phytosanitary rules.
- **Italy:** Pineapple imports declined in MY25 due to subdued demand and lower Costa Rican arrivals and are expected to remain constrained in MY26.

Source: MY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable;; MY26P figures are based on trade estimates & export trends. HS code 080430

Source1: [Fresh Pineapple from Japan](#)

# Price Trends and Outlook of Key Exporting Nations

Export Price Trend



Price outlook for next quarter (MAM)\*

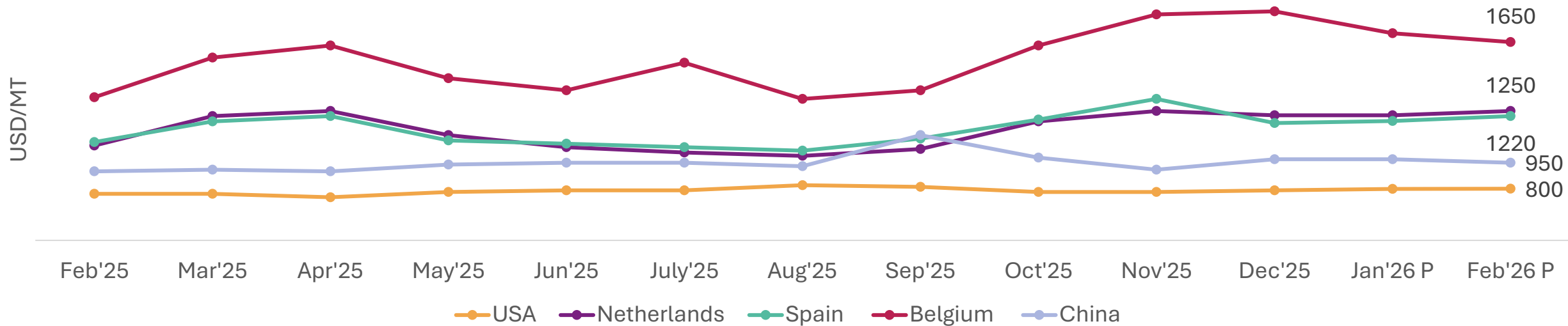
Countries	Feb'26 P Price (USD/MT)	Feb'25 Price (USD/MT)	%age change	Price direction	Price range
<b>Costa Rica</b>	640	630	2%	<b>Bullish</b>	650-700
<b>USA</b>	1070	1050	2%	<b>Sideways</b>	1040-1100
<b>Spain</b>	1450	1340	8%	<b>Bullish</b>	1450-1550
<b>China</b>	1200	1510	-21%	<b>Bullish</b>	1250-1350

- **Despite Costa Rica's continued dominance** in global exports (nearly 80%), improved market access in the US (its largest export destination) following the removal of tariffs has supported price stability.
- **U.S. pineapple prices are expected to remain range-bound** around \$1,040–1,100/MT, as strong import demand particularly for processed pineapple products continues to support stable market prices. Prepared pineapple imports into the U.S. have grown sharply by ~21% (Nov'24 to Oct'25) in volume, reflecting strong consumer demand and supporting steady price levels.
- **China's pineapple export prices are expected to remain bullish** in the next quarter, supported by growing demand from processing industries and expanding exports of canned and prepared pineapple products.
- Spain's export prices are expected to remain firm with a bullish outlook (~\$1,450-1550/MT), supported by tightening supply and stable demand in European markets.

Source: Prices are from ITC Trade Map (till Dec 2025); Jan & Feb 2026 figures are seasonality and trend-based estimates, HS code 080430

**Note** Price forecasting is based on the fundamental analysis. MAM stands for March, April, and May 2026.

# Price trends of Key Importing Nations



- **US:** Pineapple import prices remain firm in February 2026, driven by steady processing demand and limited sourcing options.
- **Major exporters** like Costa Rica, Netherlands, Thailand, and Honduras **face difficulties meeting trade commitments** due to high input costs, strong domestic demand, and unfavorable weather.
- **Netherlands:** Import prices are high **due to strong EU re-export demand** and **tight Costa Rican supplies**, with logistical congestion supporting prices.
- **Spain:** Import prices are firm, driven by steady retail demand for premium quality fruit and lower Latin American inflows.
- **Global pineapple prices are expected to remain firm 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



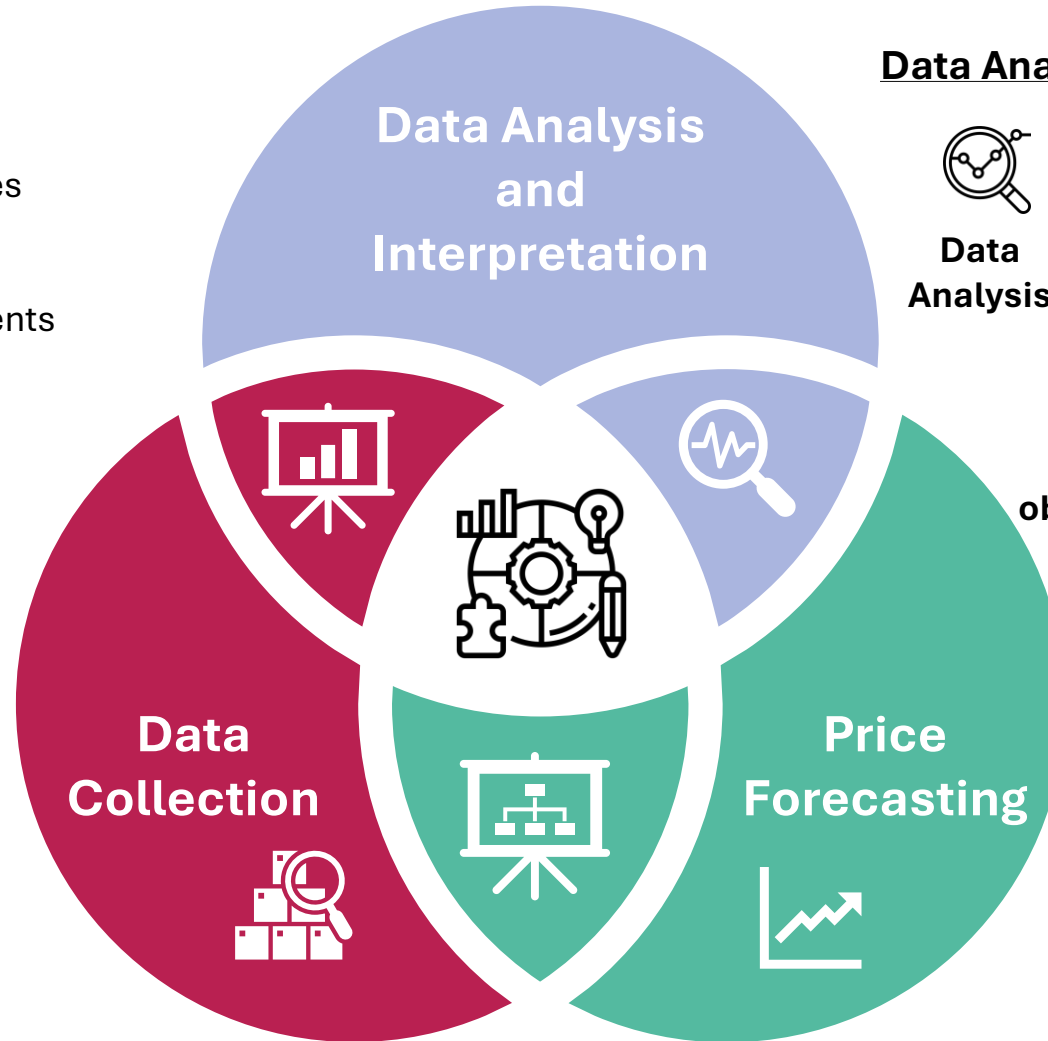
### Sources

- 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 of FOB prices
- 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.*