Crisil
a company of S&P Global

एपीडा
APEDA

Monthly dashboard
Pineapple

HS code: 080430

March 2026

Acreage and Production Trends

Pineapple Crop Calendar of Top 10 Producing Countries

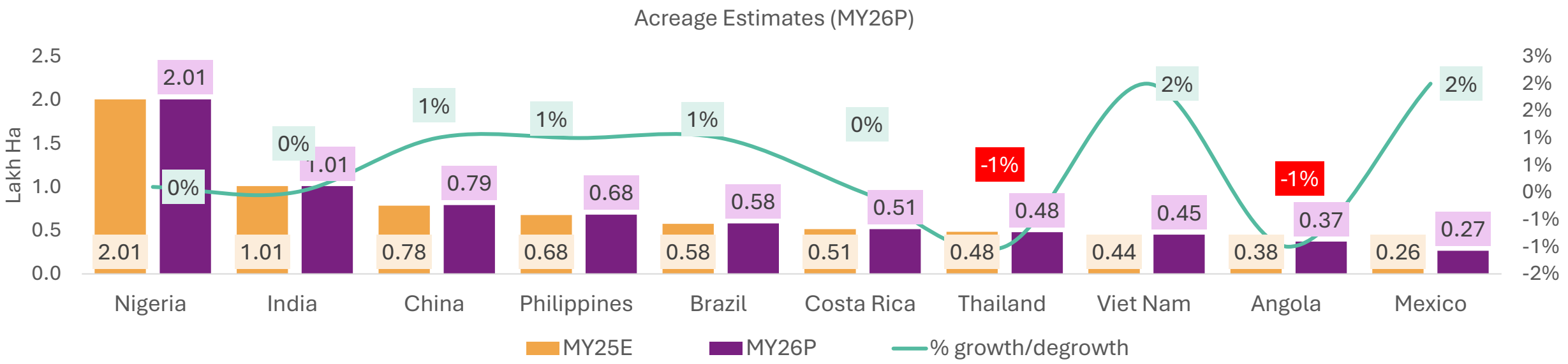
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Costa Rica												
Philippines												
Indonesia												
China												
Brazil												
India												
Nigeria												
Mexico												
Thailand												
Colombia												

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.
- **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*

Acreage Estimates of Major Producing Countries

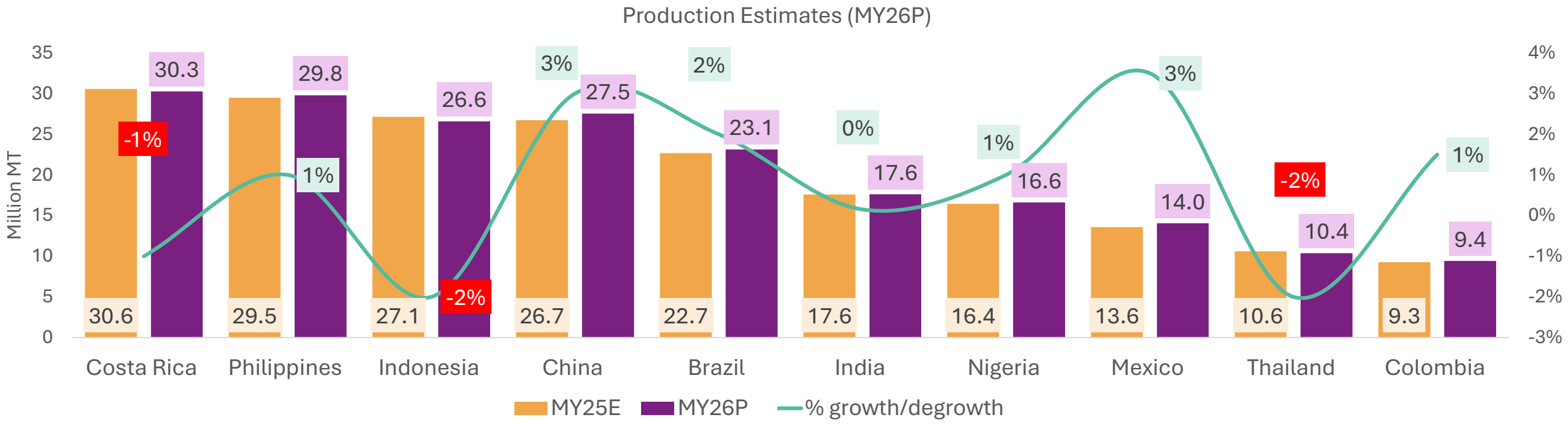


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart **account for ~70% of global pineapple area**, with global acreage estimated to rise moderately by 0-1% YoY in MY26P, driven by China, Philippines, Brazil, Vietnam and Mexico.
- **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 MY2026P,** while countries like **China, is likely to witness improved acreage** due to rising export momentum and profitability.
- **Brazil's[1] 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.
- Pineapple acreage in **Mexico** is **increasing** in Veracruz and Oaxaca as exporters expand MD2 plantations to supply the U.S. market, supported by improved irrigation investments and stronger fresh pineapple export logistics.

Source: FAOSTAT; MY25 acreage estimated and MY26 projected based on historical trends and secondary research; *India's acreage referred from MoA&FW and projection based on trend analysis and interactions*
Source 1. Brazil's pineapple acreage; 2. Mexico's pineapple acreage

Production Estimates of Major Producing Countries



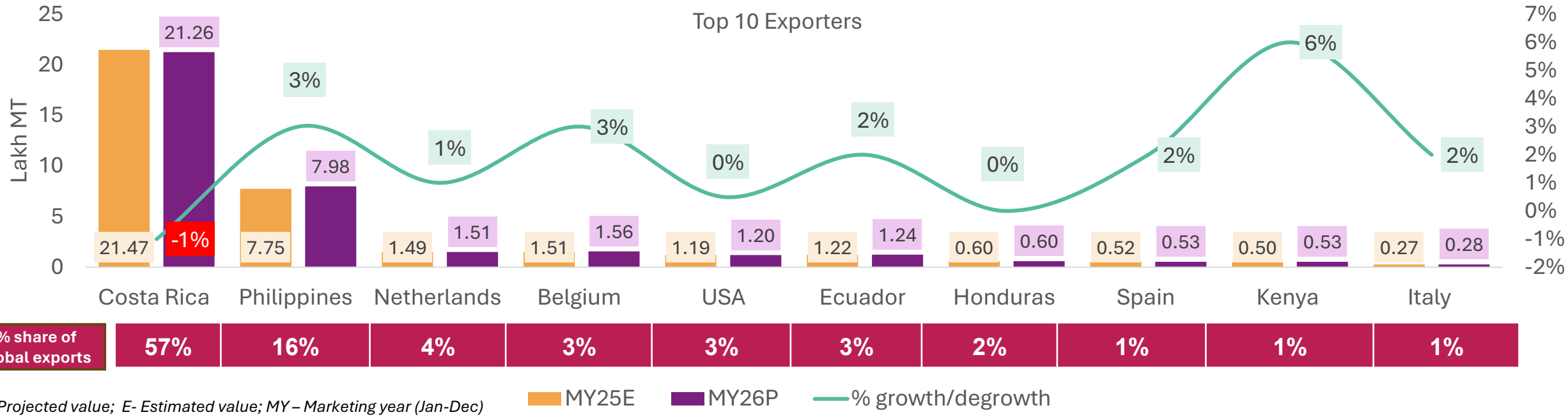
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart account for **~70% of global pineapple production**, with production estimated to marginally 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: FAOSTAT; MY25 production estimated and MY26 projected based on historical trends and secondary research. *India's production referred from MoA&FW and projection is based on trend analysis and on ground interactions*

Export Trends and Price Outlook

Major Exporters of Pineapple

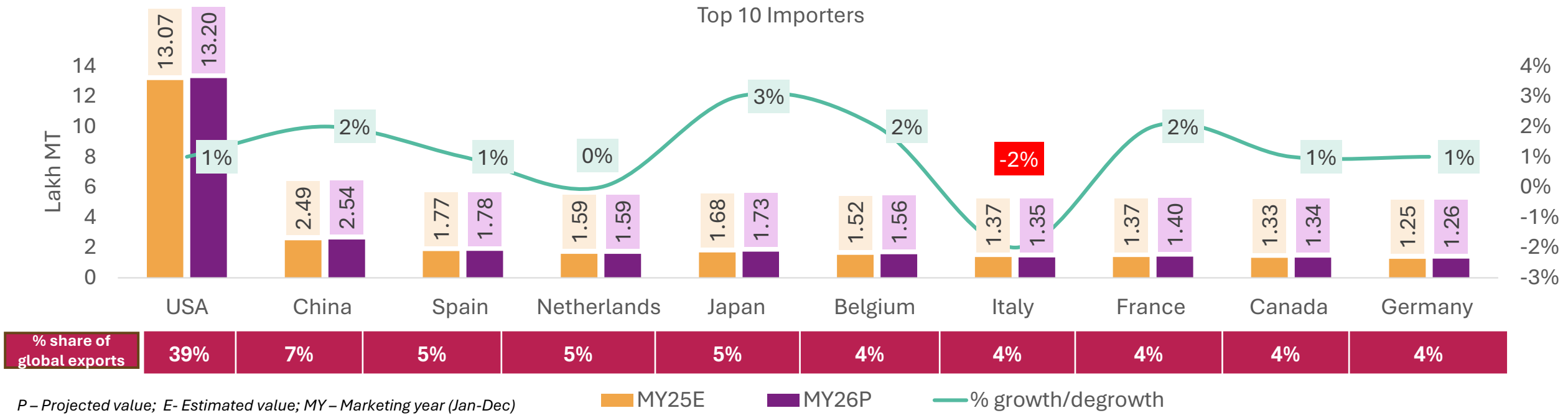


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart account **for ~92% of global exports**. Global exports in MY26P are expected to remain stable.
- **Costa Rica's[1] pineapple production** is expected **to decline** due to planting delays, and increased pest infestations in regions like Río Cuarto and Sarapiquí. Exports also projected to fall by around ~1%. In MY25, Costa Rica's shipments were mainly destined for the US (54%), Belgium (12%), and Spain (8%).
- **Philippines'[2] pineapple** exports are projected to increase in MY26P, on a high base of **~14% rise** in **MY25**. This growth is driven by strong demand from **China**, **Japan**, and **South Korea**, as well as **improved yields.**
- **Netherlands exports are expected to rise** as the country strengthens its position as a European redistribution hub, supplying Germany and Nordic markets via Rotterdam-based traders, supported by stable EU demand and efficient intra-EU logistics.[3]

Source: ITC Trade Map; MY25E export volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends. HS code 080430
Source: 1. Freshplaza; 2: Freshplaza; 3. Netherlands Exports;

Major Importers of Pineapple

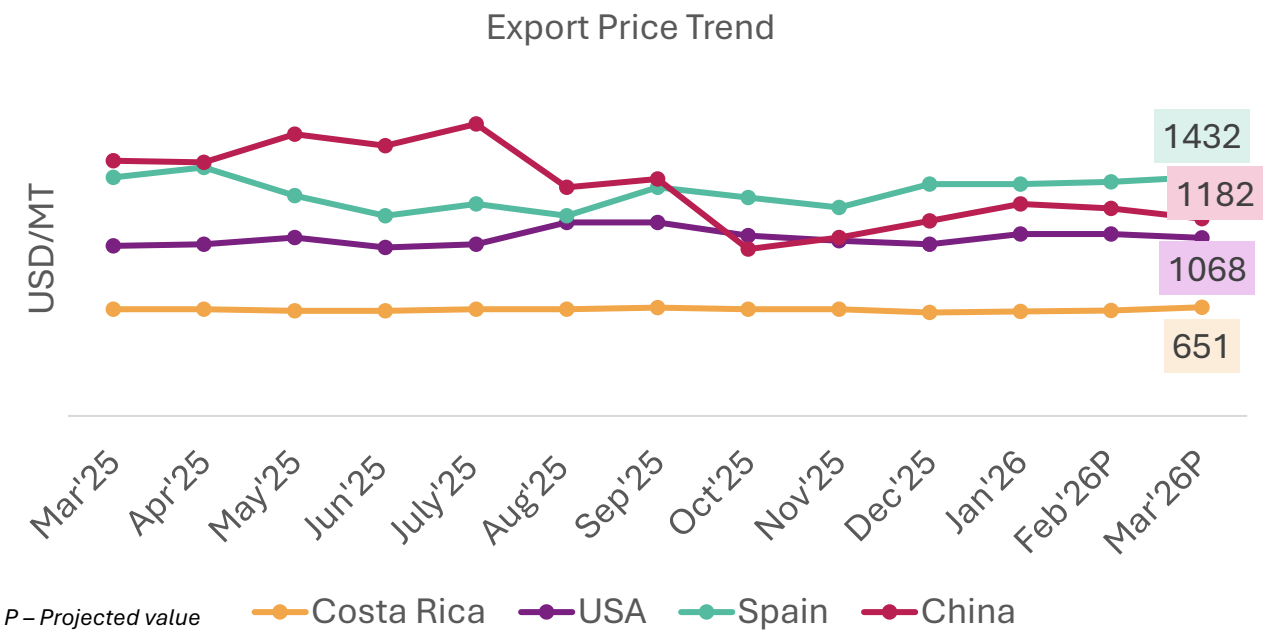


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **US**[1]: Pineapple imports are expected to **increase marginally** due to **rising consumer demand** for **fresh tropical fruits**, **expansion of processed fruit applications**, and **limited domestic production**, keeping the US market heavily import-dependent.
- **France**: Imports were limited in MY25 due to high prices and logistical issues, but the EU-Mercosur trade agreement may boost imports in MY26, as **the EU accounts for ~7-10% of France's pineapple imports.**
- **Japan**[2]: 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 (~+2%) in MY26 despite stringent phytosanitary rules.
- **Belgium**[3]: Pineapple imports are projected to rise modestly (~2%) as Antwerp-linked trading hubs increase sourcing from Costa Rica and EU suppliers, supporting intra-European redistribution and strengthening Belgium's role in tropical fruit logistics.

Source: ITC Trade Map; MY25E import volumes include estimates where recent data is unavailable; MY26P based on trade estimates and export trends. HS code 080430
Source: 1. USA imports 2. Fresh Pineapple from Japan; 3. Belgium Imports;

Price Trends and Outlook of Key Exporting Countries



P – Projected value

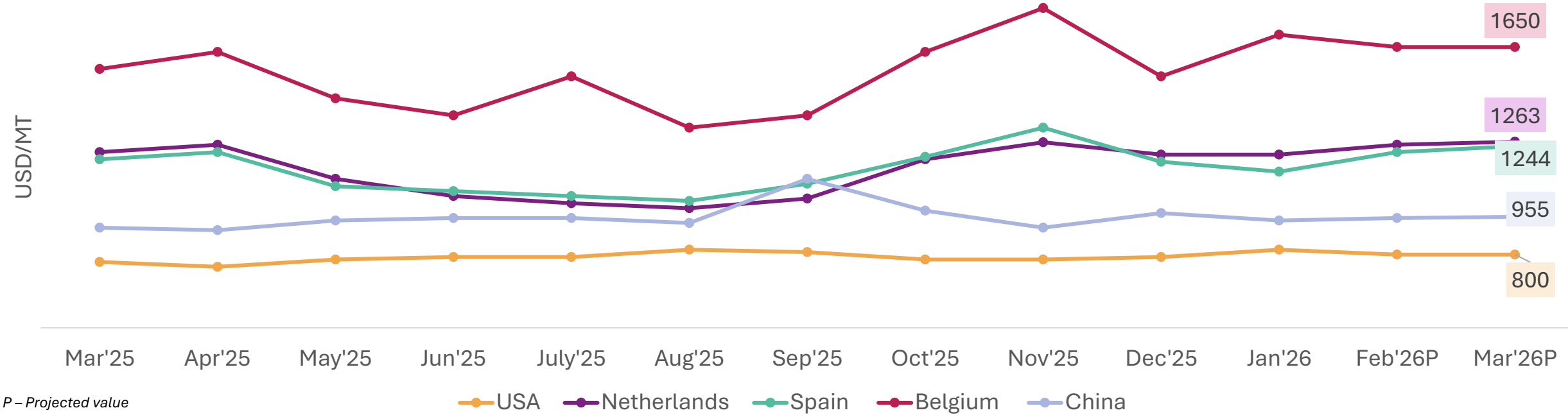
Price outlook for next quarter (AMJ)* 2026					
Countries	**Mar'26 P Price (USD/MT)**	**Mar'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for AMJ (USD/MT)**
Costa Rica	651	640	2%	Bullish	650-710
USA	1068	1020	5%	Sideways	1050-1100
Spain	1432	1430	0%	Bullish	1450-1510
China	1182	1530	-23%	Sideways	1160-1220

- **Costa Rica's continued dominance** in global exports (~80%) and improved market access in the US (its largest export destination) following the removal of tariffs has supported firm prices.
- **U.S. pineapple prices are expected to remain stable at $1,050–1,100/MT**, supported by strong import demand—especially for processed products, which saw a 21% volume increase. Despite higher shipping costs and geopolitical tensions, steady retail demand is keeping prices firm, with a slight rise likely through May before stabilizing in June.
- **China's** pineapple prices are projected to **ease** by **~5% M-o-M in March 2026**, as **recovering regional production** and **moderate domestic demand** temporarily **boost supply**, helping to counterbalance **global supply limitations.**
- Spain's pineapple market continues to rely heavily on Costa Rican imports. Limited shipments and stronger European spring demand have driven a month-on-month export price increase of about 1–2% in March 2026. Prices are expected to edge higher in the next quarter.

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates, HS code 080430

Note Price forecasting is based on the fundamental analysis. AMJ stands for April, May, and June 2026.

Price Trends of Key Importing Nations



P – Projected value

- **US**: Pineapple import prices are projected to stay strong in March 2026, supported by consistent processing demand and restricted sourcing choices.
- **Major exporters** like Costa Rica, 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 remains firm, supported by consistent consumer demand for premium fruit and higher export prices from Costa Rica.
- **Global pineapple import prices are expected to remain firm throughout MY26P due to:**
  - **Erratic rainfall and temperature fluctuations** impacting yields in major producing regions like **Guangdong** & **Hainan** in **China**[1].
  - **Localized heavy rainfall forecast in Southeast Asia,** potentially disrupting short-term harvest in countries like Thailand and emerging supplier Vietnam.

Source: ITC Trade Map (up to Jan 2026); prices for Feb and Mar 2026 are estimated based on seasonal patterns, trade trends and trade estimates, HS code 080430
Source: 1. China's climatic conditions

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.

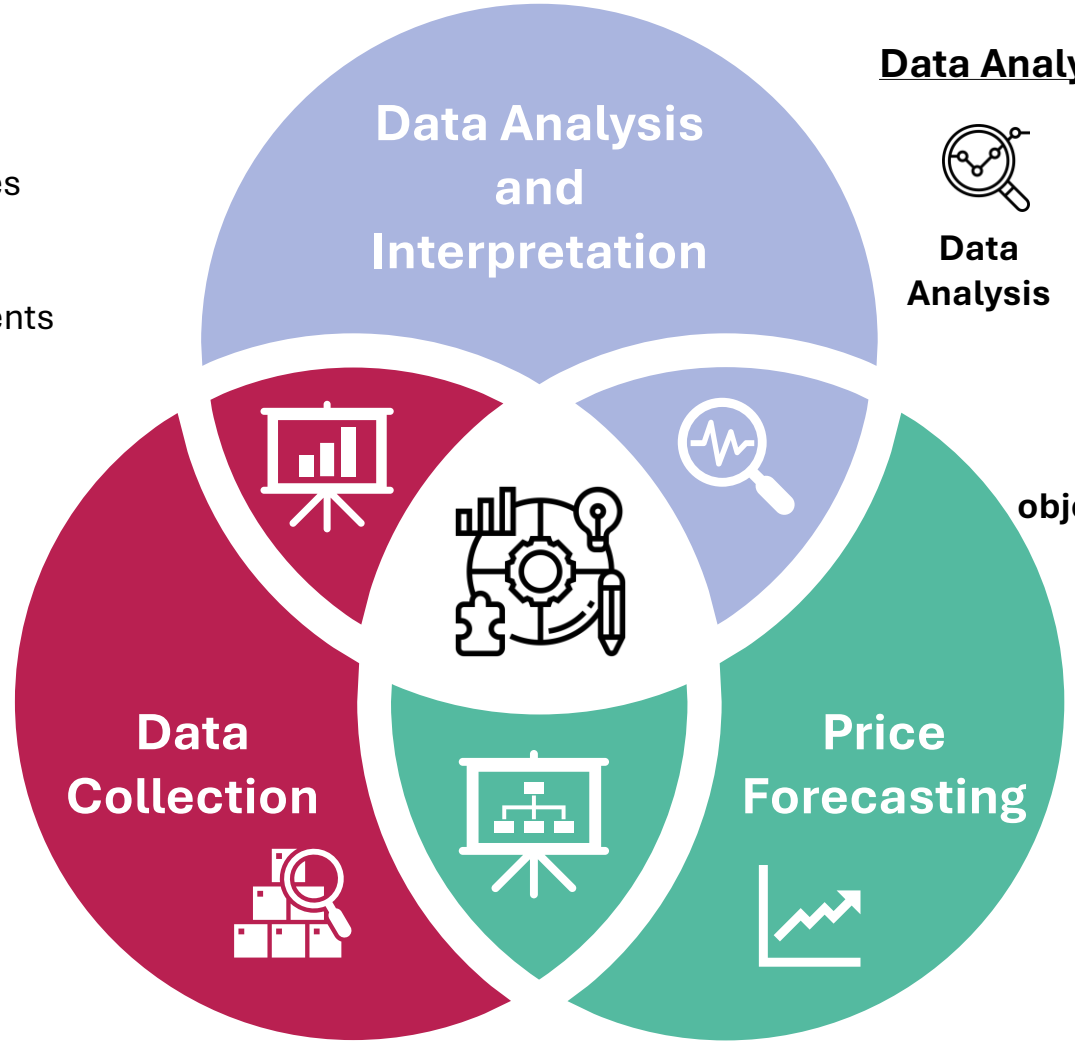
Data Collection

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.