Crisil
Intelligence

एपीडा
APEDA

Monthly dashboard
Pineapple

April 2026

HS code: 080430

Acreage and Production trends

Pineapple Crop Calendar for Top 10 Producing Countries

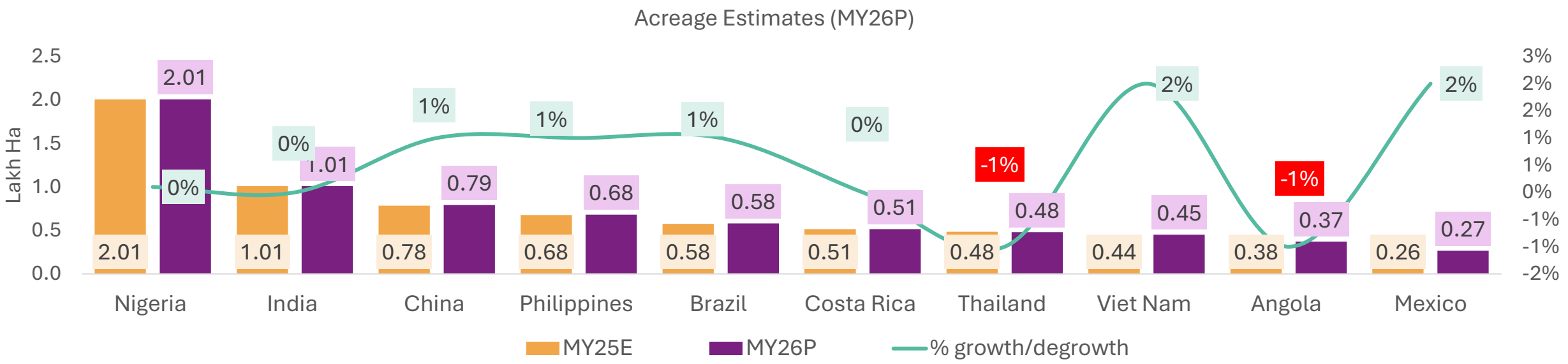
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Costa Rica												
Philippines												
Indonesia												
China												
Brazil												
India												
Nigeria												
Mexico												
Thailand												
Colombia												

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

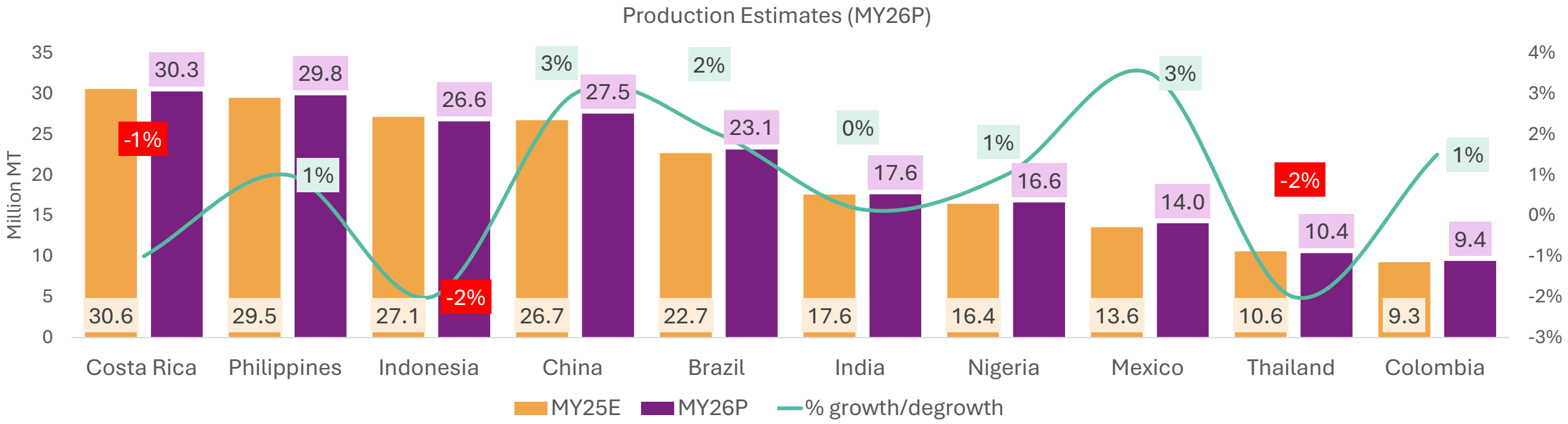


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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** in **MY26P,** 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 in **MY26P**, 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 in **MY26P** to supply the U.S. market, supported by improved irrigation investments and stronger fresh pineapple export logistics.

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

Production Estimates of Major Producing Countries



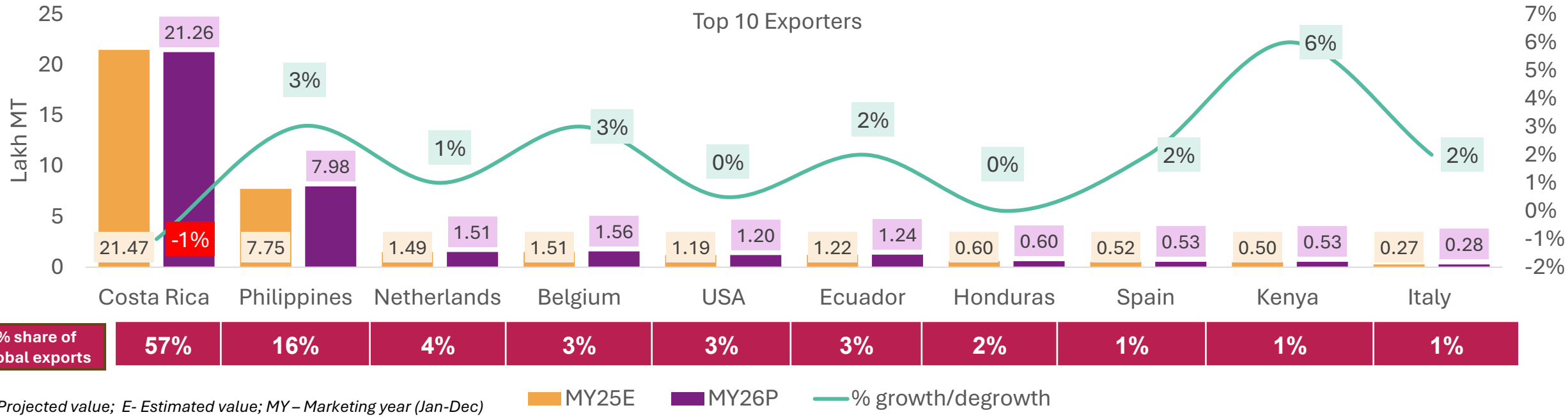
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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** by **1-2% in Costa Rica** in **MY26P**, primarily due to erratic climatic conditions affecting yields and crop cycles.
- India's production is projected to remain stable in **MY26P**, supported by steady acreage and unchanged cultivation practices.
- Key trends and drivers across key countries in **MY26P**-
  - **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 figures are based on historical trends and secondary research. *India's production figures are referred from MoA&FW and projection is based on trend analysis and on-ground interactions*

Export Trends and Price Outlook

Major Exporters of Pineapple

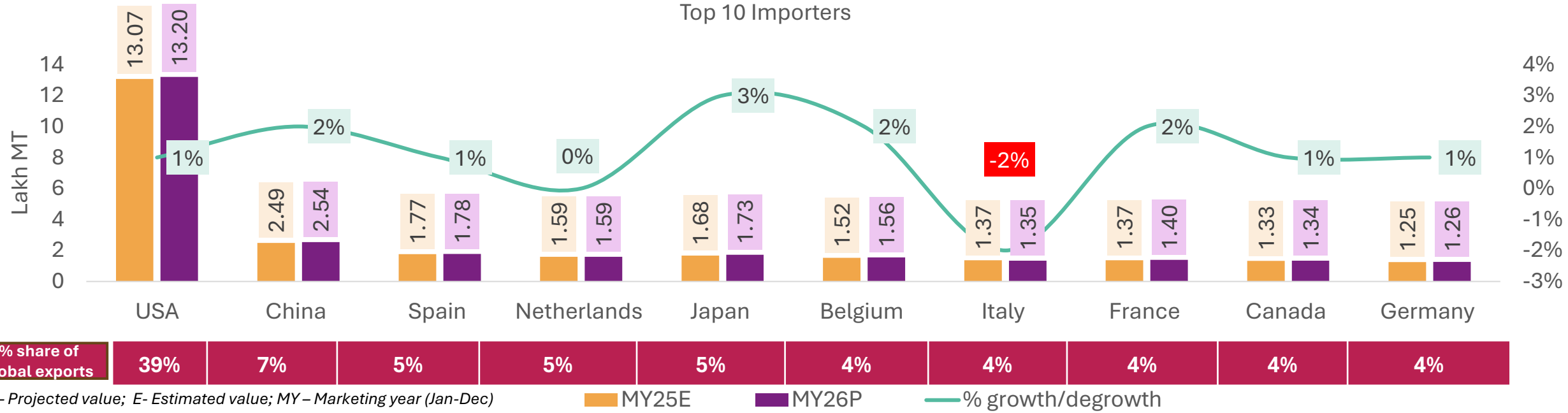


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- The countries in the chart account **for ~92% of global exports**. Global exports in **MY26P** are expected to **inch-up** marginally by **1-2%.**
- **Costa Rica's[1] pineapple production** is expected **to decline** due to planting delays, and increased pest infestations led by adverse climatic conditions in regions like Río Cuarto and Sarapiquí. Exports also projected to fall by around ~1% in **MY26P**, with shipments largely destined for the US (54%), Belgium (12%), and Spain (8%).
- **Philippine[2] pineapple** exports are projected to **grow 2-3%** in **MY26P,** supported by **efforts to access the U.S. market** through **phytosanitary compliance** and **irradiation systems**, alongside expansion of **MD2 (Golden) varieties** preferred for **sweetness**, **shelf life**, and **retail consistency.**
- **Ecuador's[3] pineapple exports are projected to increase by 1-2% in MY26P.** This growth is driven by diversification efforts beyond bananas, improved yields resulting from favorable weather conditions, expanding cultivation areas, and stronger regional trade connections.

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: Philippines Exports; 3. Ecuador Exports;

Major Importers of Pineapple

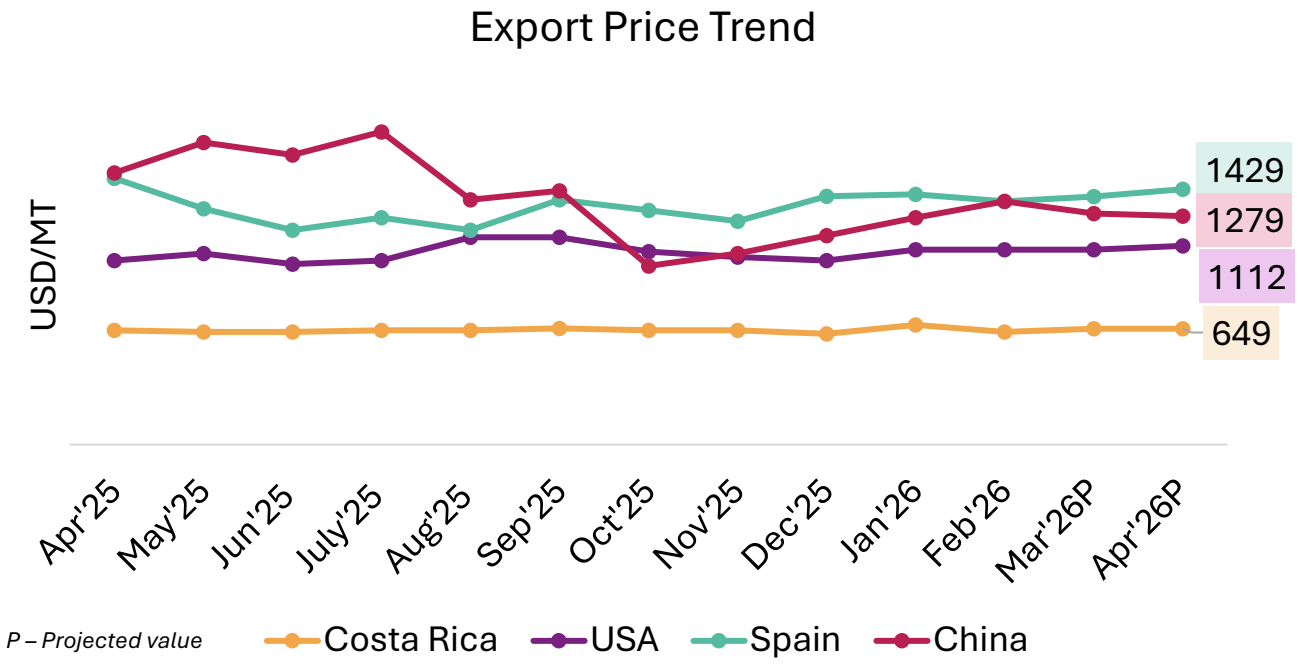


- **USA's** pineapple imports are expected to **rise** in **MY26P**, driven by **APHIS's** proposed full market access for **Taiwanese pineapples** — currently restricted to **Guam** and **CNMI** — unlocking **16,892 tonnes** of year-round **Taiwanese supply** backed by **government export incentives** and **active US buyer partnerships.**
- **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]: MY25 saw a 7-8% increase in pineapple imports, primarily fueled by strong processing demand resulting from the orange juice shortage spillover and high retail consumption. Imports are forecasted to grow by 3-4% in MY26P, maintaining elevated levels on a high base.
- **China:** Imports grew 8% in MY25, fueled by consumer demand and wider distribution, and are expected to further expand (+2%) in MY26P despite stringent phytosanitary rules.
- **Belgium**[3]: Pineapple imports are expected to grow by **~2%** in **MY26P,** as **Antwerp-linked trading hubs** boost their sourcing from **Costa Rica** and **EU suppliers**, which in turn facilitates **intra-European redistribution** and reinforces **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;

APHIS: The Department of Agriculture's Animal and Plant Health Inspection Service
CNMI: Commonwealth of the Northern Mariana Islands

Price Trends and Outlook of Key Exporting Countries



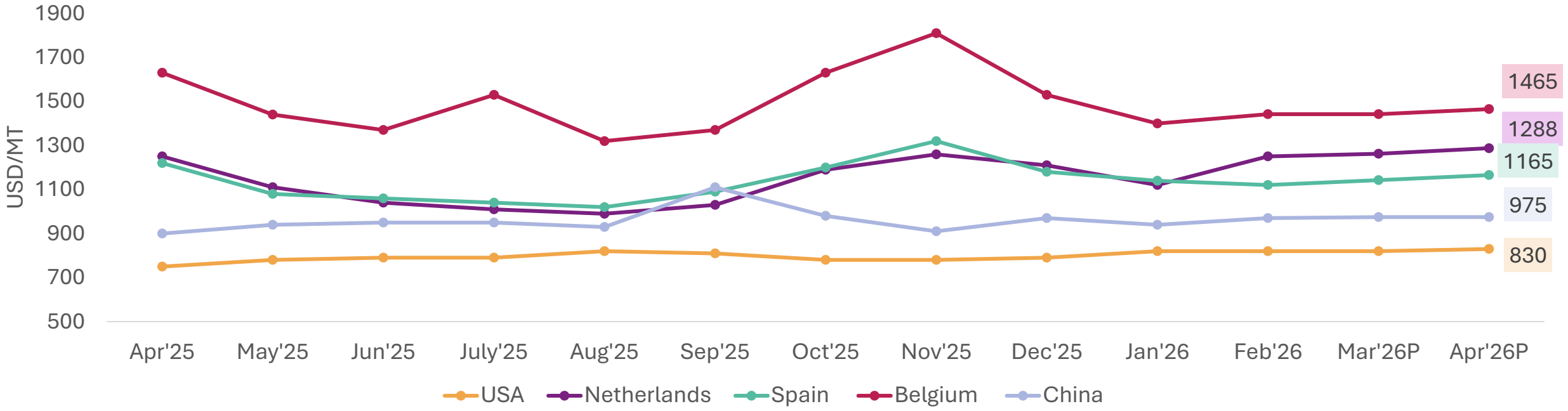
Price outlook for next quarter (MJJ)* 2026					
Countries	**Apr'26 P Price (USD/MT)**	**Apr'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for MJJ (USD/MT)**
Costa Rica	649	640	**1%**	**Bullish**	660-720
USA	1112	1030	**8%**	**Sideways**	1090-1150
Spain	1429	1490	**-4%**	**Sideways**	1410-1470
China	1279	1520	**-16%**	**Bullish**	1340-1400

- **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 sideways at $1,090–1,150/MT** in the upcoming quarter, as **strong import demand** - led by a **21% surge in processed product** volumes is offset by **steady Costa Rican supply** (80% of global share), and **elevated shipping cost** keeping the **net price movement sideways**, despite firm underlying demand.
- **China's** pineapple prices hovering around ~USD 1,275-1,280/MT in **April'26** and are expected to remain firm in the upcoming quarter despite a ~16% Y-o-Y dip, as strong summer demand and export grade sorting offset peak supply season, with weather variability limiting effective availability.
- **Spain's** pineapple market remains heavily dependent on imports from **Costa Rica**. Due to limited shipments and **increased European spring demand**, export prices are **anticipated to rise ~2-3% MoM in April 2026**. Prices are projected to **stay range bound** during the upcoming quarter.

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

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

Price Trends of Key Importing Nations



P – Projected value

- **US**: Pineapple import prices are projected to remain stable in April 2026, driven by steady processing demand, restricted sourcing options, and a tight supply from Costa Rica.
- **Belgium's** role as a **European redistribution hub**, coupled with firm **intra-EU demand** and **logistical constraints** at **major ports**, is expected to **marginally lift** import prices in **April'26**.
- **Netherlands**: Import prices are estimated to have remained high **due to strong EU re-export demand, Easter-led consumption, and constrained Costa Rican arrivals** which is anticipated to have supported **higher landed prices** across **Dutch import channels** during **April 2026.**
- **Spain**: Import prices remains firm, supported by consistent consumer demand for premium fruit and higher export prices from Costa Rica.

Source: ITC Trade Map (up to Feb 2026); prices for Mar and Apr 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.

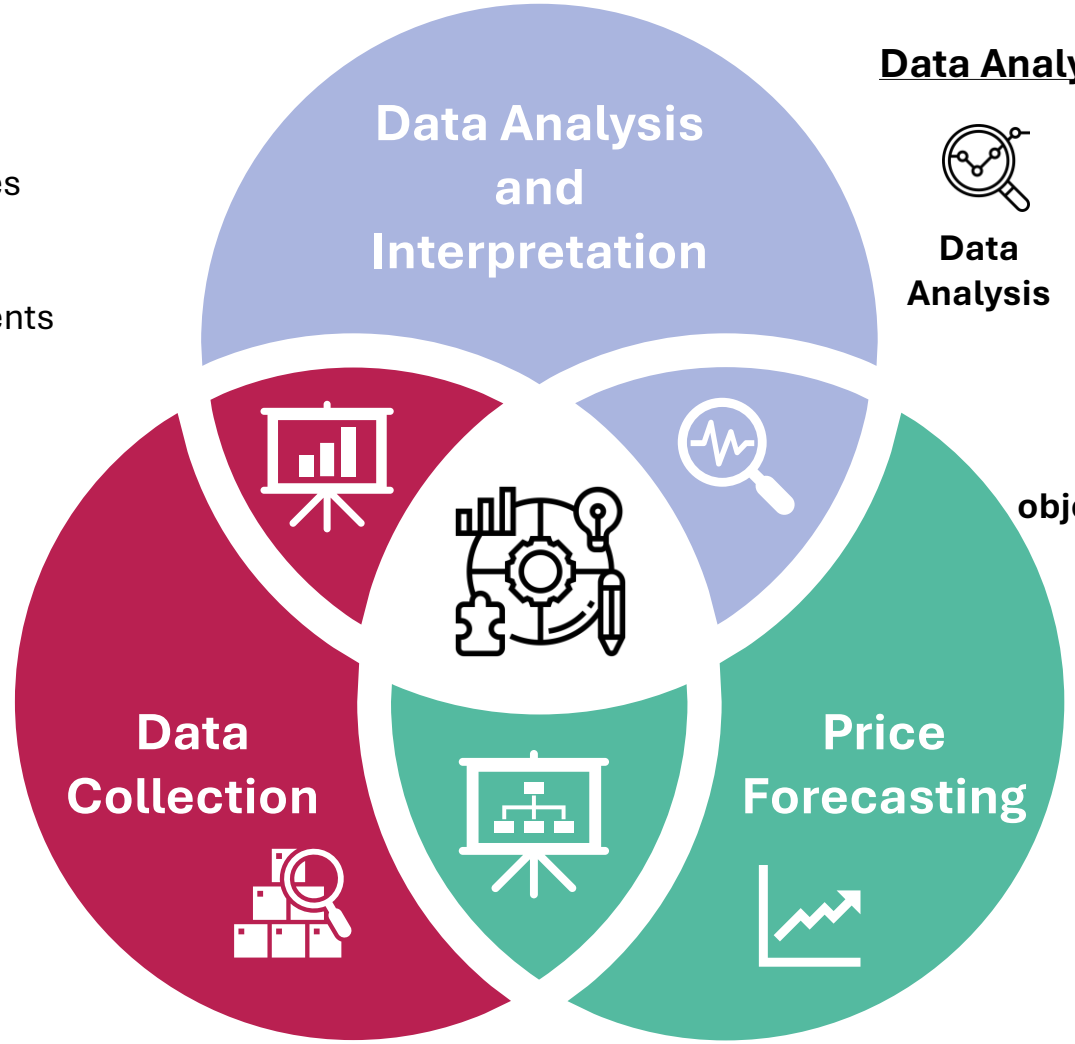
Data Collection

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.