Crisil Intelligence

एपीडा
APEDA

Monthly dashboard Pineapple

May 2026

HS code: 080430

Acreage and Production trends

Pineapple Crop Calendar for Top 10 Producing Countries

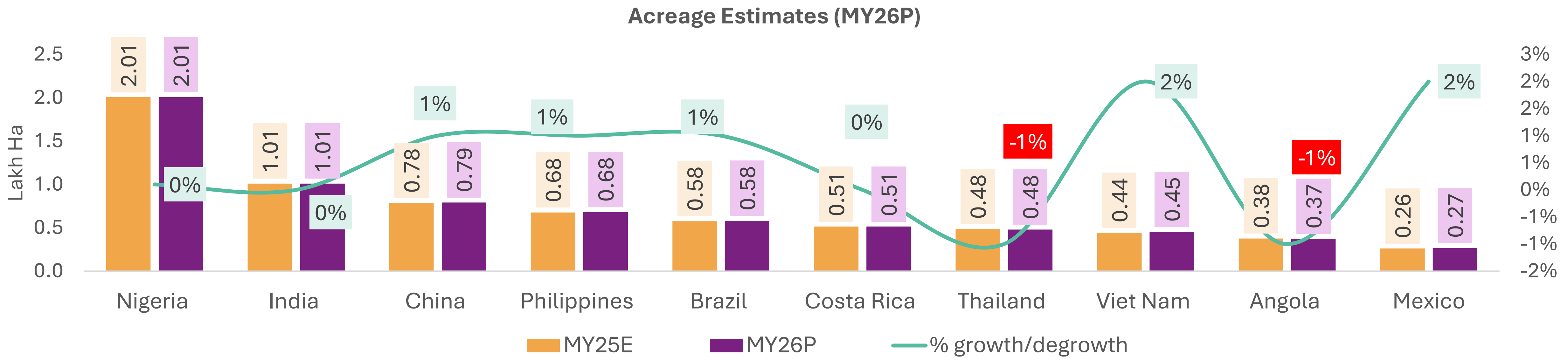
Countries	Jan	Feb	March	April	May	June	July	August	September	October	November	December
Costa Rica	Lean	Lean	Lean	Peak	Peak	Peak	Peak	Lean	Lean	Lean	Lean	Lean
Philippines				Lean	Peak	Peak	Peak	Lean				
Indonesia	Lean	Lean	Peak	Peak	Peak	Peak	Peak	Lean	Lean	Lean	Lean	Lean
China			Peak	Peak	Peak	Peak	Peak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

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

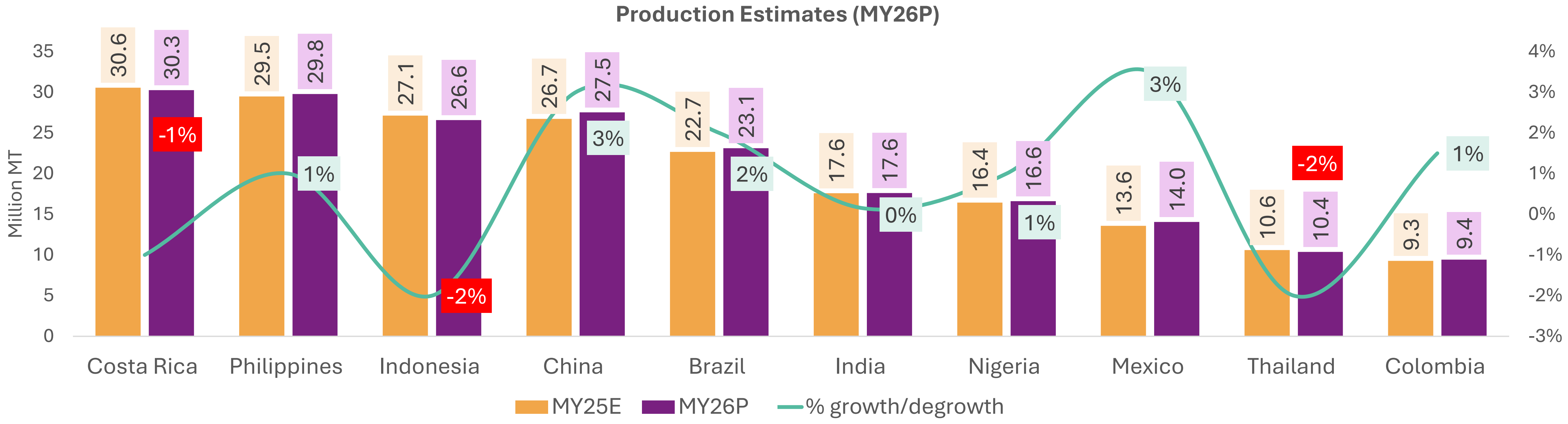


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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



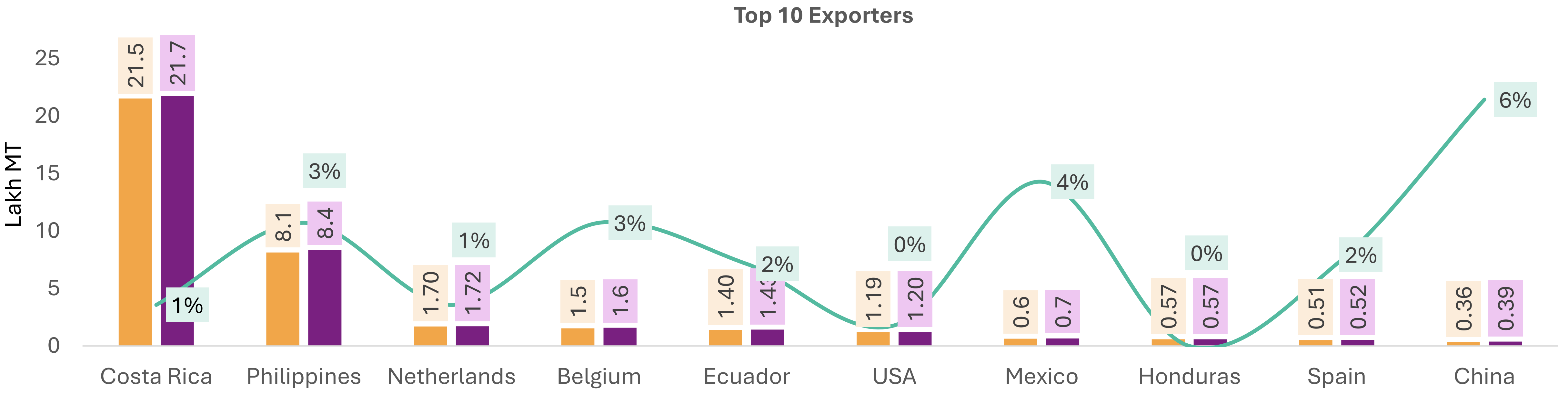
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- 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



% share of global exports	53%	20%	4%	4%	3%	3%	2%	1%	1%	1%

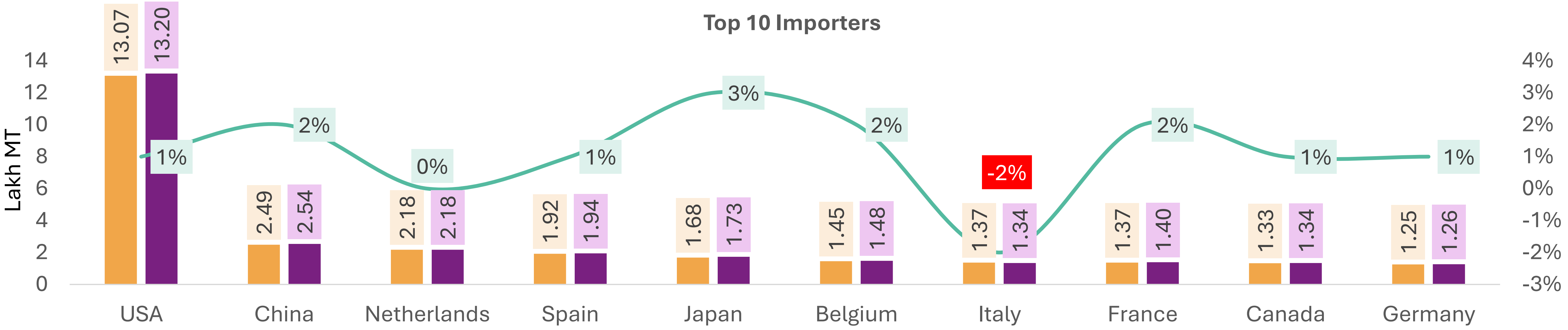
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

MY25E MY26P % growth/degrowth

- The countries in the chart account **for ~92% of global exports**. Global exports in **MY26P** are expected to **inch-up** marginally by **2-3%,** led by **Philippines, Mexico, and China.**
- **Costa Rica's**[1] pineapple exports are projected to **rise** by **1–2%** in **MY26P** as **demand** from the **juice-processing industry** remains **strong,** although decline in production and higher operating costs could constrain gains.
- **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.**
- **Netherlands'**[3] pineapple exports are expected to grow by 1 to 2% in MY26P, supported by Rotterdam's role as a key perishable's hub, re-exports from Costa Rica, and stable intra-European Union redistribution.

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. Costa Rica Exports; 2: Philippines Exports; 3. Netherlands Exports;

Major Importers of Pineapple



% share of global exports	36%	7%	6%	5%	5%	4%	4%	4%	4%	3%

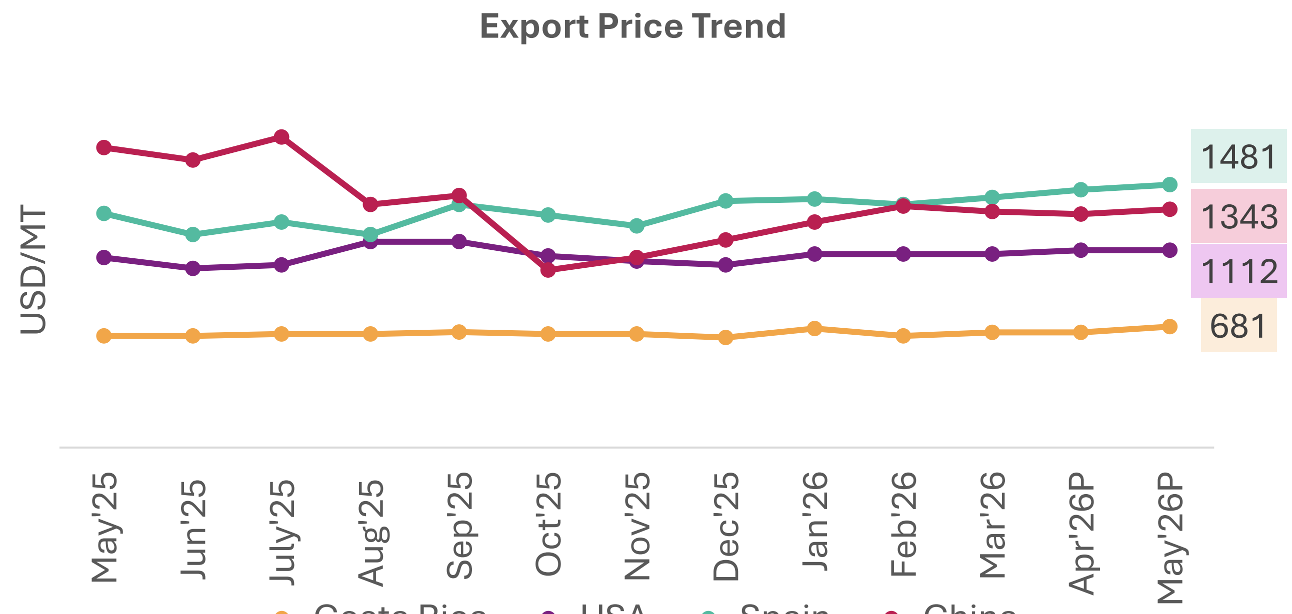
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec) MY25E MY26P % growth/degrowth

- **USA's pineapple imports are expected to rise in MY26P**, driven by APHIS's proposed full market access for Taiwanese pineapples, unlocking ~16,900 tonnes of year-round supply, supported by government incentives and strong 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.
- **Italy:** Pineapple imports are anticipated to **ease** marginally by **~1-2%** in **MY26P**, as **elevated prices** driven by **Costa Rica supply constraints**, **rising logistical costs**, and **shrinking household buyer base** weigh on import pull.
- **Belgium[3]**: Pineapple imports are expected to grow by **1-2%** 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



P – Projected value

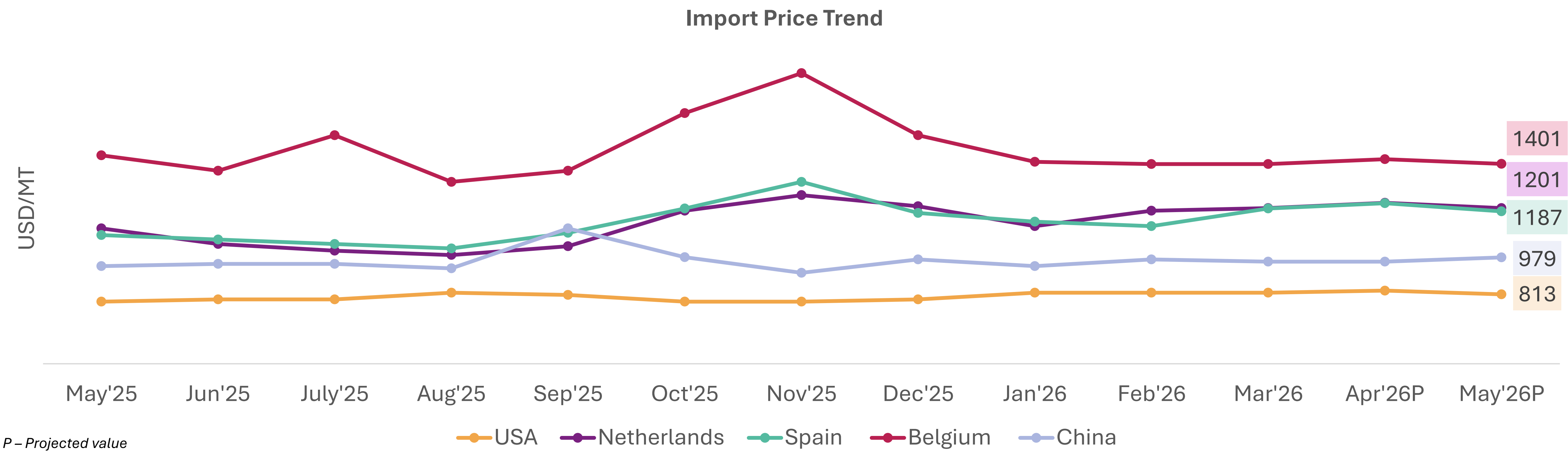
	Price outlook for next quarter (JJA)*				
Countries	**May'26 P Price (USD/MT)**	**May'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for JJA (USD/MT)**
Costa Rica	681	630	8%	Sideways	660-720
USA	1112	1070	4%	Sideways	1110-1170
Spain	1481	1320	12%	Sideways	1460-1520
China	1343	1690	-21%	Bullish	1530-1590

- **Costa Rica's continued dominance** in global exports 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 $1,110–1,170 per metric tonne** in the upcoming quarter, as strong demand is offset by steady Costa Rican supply
- **China's pineapple prices** are expected to remain firm at ~$1,340–1,350 per metric tonne in May 2026 and **stay bullish in June–August 2026**, as domestic harvest in Guangdong and Hainan ends by July, tightening supply and supporting prices
- **Spain's pineapple market remains import-dependent on Costa Rica**, with prices rising by ~2-3% month-on-month in May 2026 (provisional) due to limited shipments and higher European spring demand. **Prices are expected to remain stable in the upcoming quarter.**

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

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

Price Trends of Key Importing Nations



P – Projected value

- **The US** pineapple import prices are projected to **ease** marginally by **~1-2%** in **May’26P (MoM)**, as natural flowering in Costa Rica temporarily nudges exportable volumes slightly higher, softening landed costs despite sustained processing demand.
- **The Netherlands’** import prices are estimated to **soften** in **May’26P** due to **post-Easter demand cooling** and Costa Rica's natural bloom-driven supply surge, easing **Rotterdam** landed costs across **Dutch import channels.**
- **Belgium's** role as a **European redistribution hub**, cushioned by multi-origin sourcing across **Costa Rica** and **West Africa**, is expected to **limit** the seasonal price correction to a marginal dip by **~1-2%** in **May’26P (MoM).**
- **Spain’s import prices to decline in May’26P**, driven by higher Costa Rican supply of smaller fruit, leading to seasonal price pressure.

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.

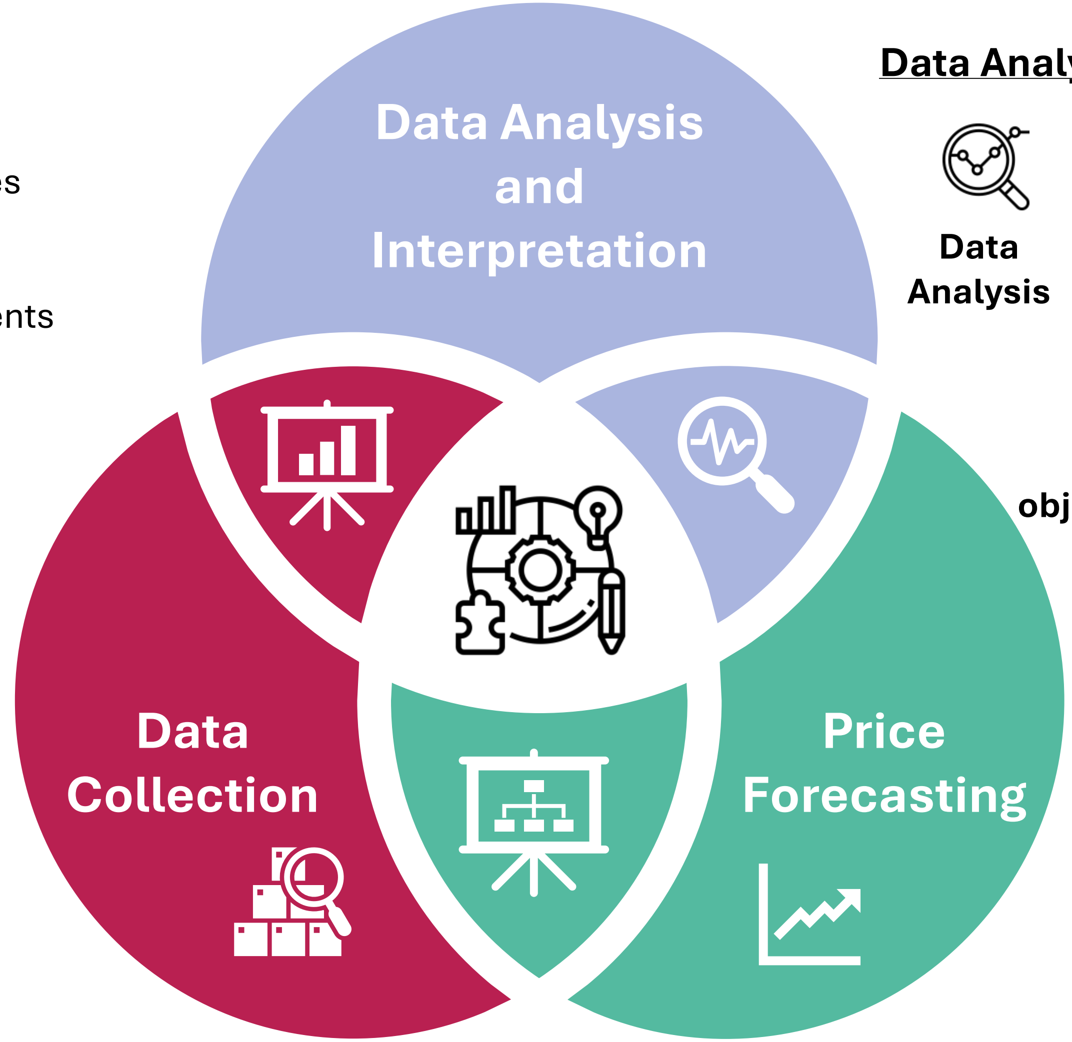
Data Collection

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.