

Key insights into global pineapple market

The global pineapple market grew to \$14.9bn in wholesale prices in 2016 - this figure reflects total revenue of producers and importers (excluding logistics costs, retail marketing costs, and retailers' margins, which will be included in the final consumer price). A decline of market value by 5% in 2009 was followed by a robust growth in 2016.



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According to IndexBox estimates, the pineapple market reached 26.4 million tonnes, growing by an average +3.3% per year over the last nine years. In the last year, the growth of pineapple consumption softened against its pace gained over the previous years.

The Asian market is the main driver behind the increasing pineapple consumption

Pineapple consumption will continue to grow at a moderate pace following rising income and population growth as well as marketing programmes aimed at promoting healthy, balanced nutrition.

The main driver behind the growing pineapple consumption will be the dynamically developing Asian market (primarily China, Indonesia, India, Viet Nam and the Philippines) and Latin American markets (the Dominican Republic and Costa Rica), where thanks to sustainable urban growth and rising living standards, the demand for high-quality fruit will continue to grow. An increasing number of consumers are demanding fresh fruit, which is becoming possible due to development of storage technologies.

An increasing demand for canned pineapples worldwide is also a factor, especially noticeable in the Philippines, Indonesia and China, which experienced a noticeable growth in canned pineapple exports over the recent years.

Driven by the anticipated growth of population and income level, the demand for high-quality fruit will continue to grow. On the other hand, growing popularity of healthy eating, using pineapples for products in "fast food" establishments, and for cooking worldwide should also support pineapple consumption over the next nine years.

In addition, the development of e-commerce along with the development of storage technologies made fruit consumption more affordable and convenient. Therefore, the performance of the market is forecast to accelerate slightly, with an anticipated CAGR of +2.9% from 2016 to 2025, which is expected to bring the market volume to 34.2 million tonnes by 2025.

Top five consuming countries

Brazil, the Philippines, Indonesia, India and China held 40% of pineapple consumption.

The countries with the highest consumption were Brazil (11% of the world total), the Philippines, Indonesia (8%, each), India (7%), China (6%), Nigeria, Thailand (5%, each), Costa Rica, the U.S. (4%, each), Angola, Mexico, Colombia, Ghana (3%, each), Viet Nam, the Dominican Republic (2%, each). The remaining countries made up 24% of global pineapple market.

The highest annual growth rates of pineapples consumption from 2007 to 2016 were recorded in Ghana, with +38.4% growth, Angola, with +28.3%, the Dominican Republic and Costa Rica, with +23.4% and +22.0% growth, respectively. Consequently, Angola, Costa Rica, Ghana (+3 percentage points, each) and the Dominican Republic (+2 percentage points) strengthened its share in terms of the global consumption from 2007 to 2016. By contrast, shares of Brazil (-3 percentage points) and Thailand (-9 percentage points) declined over the period under review.

Amongst the leading consuming countries, high levels of per capita consumption were recorded in Costa Rica (242 kg/year), Angola (31.1 kg per year), the Philippines (21.2 kg per year), Thailand (20.6 kg per year), Brazil (13.4 kg per year), which were significantly higher than the world average of 3.6 kg/year. In Costa Rica and Angola, per capita consumption grew rapidly from 2007-2016.

Pineapple production reached its highest level over the last nine years

Global production of pineapples reached 26.9 million tonnes in 2016, with an upward dynamics over the last nine years. From 2007-2009, the volume of production remained relatively stable, which was followed by a tangible growth over the next three years. Afterwards, that upward trend decelerated slightly but remained positive through to 2016. An average annual growth rate of production volume was at +3.4% from 2007 to 2016.

Costa Rica, Brazil, the Philippines and Indonesia remain the main producers of pineapple. Costa Rica was the key world pineapple producing country with an output of about 3.2M tonnes in 2016, which accounted for 12% of total global output. The other major producers were Brazil (10%), the Philippines (10%), Indonesia (8%), India (7%), China (6%), Nigeria (6%), Thailand (5%), Mexico (3%) and Angola (3%).

In Angola, production levels increased by +28.3% annually from 2007 to 2016, largely attributed to the growth of harvested area. In Thailand, production levels decreased by -7.4% annually from 2007 to 2016, largely attributed to the reduction of harvested area. Most of the other major producing countries experienced a tangible growth of pineapples output. In 2007-2016 annual growth rates were especially high in Costa Rica (+8.3%), China (+6.6%), Nigeria (+5.4%), Indonesia (+4.7%), India (+3.9%).

About 13% of global production was exported

Pineapples are a widely traded commodity, with the share of export in total global output stood about 13-14% in 2007-2016. High trade intensity is determined mainly by the substantial distances between the main countries of pineapples manufacturing and key consuming countries.

Costa Rica was the largest exporter of pineapple worldwide, sending abroad approx. 64% of its output.

In 2016, the volume of global exports totalled 3.6 million tonnes, with a mixed trend pattern over the last few years. After shrinking by 10% in 2009, it increased gradually over the next five years; in 2015, however, it dropped again, bouncing back in the following year.

Costa Rica (56% of global exports) and then the Philippines (16%), the Netherlands (7%), Belgium (3%), the US (3%), Mexico (3%) and Ecuador (2%) were the main global suppliers of pineapples. From 2007 to 2016, Mexico (+11.6% per year) and the Philippines (+8.3% per year) were the fastest growing suppliers among the major exporters.

Despite being among the largest global producers of pineapples, Brazil, Indonesia, India and China did not export much of their production, meaning that it was consumed domestically. While the share of Costa Rica and the Philippines (+6 percentage points, each) increased from 2007 to 2016, the share of Ecuador (-2 percentage points) and Belgium (-6 percentage points) illustrated a moderate contraction. The shares of the other countries remained relatively stable throughout the analysed period.

The US remains the largest market for imported pineapples

The value of global imports of pineapples in 2016 stood at \$2.5bn. There was an annual increase of +1.6% for the period from 2007 to 2016. In physical terms, imports of pineapples reached 3.1 million tonnes in 2016, 208K tonnes (+7%) more than the year before.

Among the main importing countries, the US was the largest importers of pineapples, with 34% share of global imports. It was followed by the Netherlands (8%), Germany (5%), Spain (5%), the UK (5%), Japan (5%) and Italy (4%). All these countries (including the US) together comprised 66% of global pineapples imports.

The US (+5.0% per year) was the fastest growing suppliers among the major exporters. It was followed by the Netherlands (+3.7%), Spain (+2.9%) and the UK (+2.0%). By contrast, Japan decreased by -1.6% from 2007 to 2016. The US significantly strengthened its position in terms of the global imports from 27% in 2007 to 34% in 2016, while Japan reduced its share (-2 percentage points). The shares of the other countries remained relatively stable throughout the analysed period.

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