

FRESH FRUIT AND VEGETABLES

The EU market for pineapple

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Report summary

This CBI market survey discusses the EU market for fresh pineapples. The main findings include:

- The market for fresh pineapple grew rapidly from 2003 to 2007 in all EU countries, although growth slowed down from 2006 to 2007. Germany, Italy and the UK are the largest markets, while the new EU members offer good prospects for the future.
- Since 2003, EU imports of pineapple almost doubled in volume and the value increased by 46% (i.e. price level decreased 25%). Pineapple is a common product in EU consumer market.
- There is extensive trade in pineapple within the EU, with a few EU countries acting as suppliers. Belgium and the Netherlands are the leading importers and distributors in the EU through the harbours of Antwerp and Rotterdam.
- Supermarkets are the main outlets for pineapple, but they are also sold by greengrocers, street markets or hotel and catering outlets.
- The supply of pineapple to large supermarkets is highly concentrated. They are supplied by large agro-multinationals. Aside from these companies, many importers are active in trading pineapple.
- Developing countries (DCs) are the sole suppliers of pineapple. Costa Rica is, by far, the leading supplier. Other Latin American countries have strong positions, while imports from African countries are in decline with the exception for Ghana.
- For the coming year demand is difficult to predict due to the looming economic crisis. It is expected that growth will slow down, especially for the higher value market like convenience, organic and fair-trade. The United Kingdom was the first country in the EU to experience the economic downturn, and as a result, the demand for high-value exotic fruit has decreased.

This survey aims to provide exporters of pineapple from developing countries (DCs) with product-specific market information about gaining access to the EU market(s). By focusing on the EU market(s) for one product, this document provides additional in-depth information, complementary to the general information and data provided in the CBI market survey 'The fresh fruit and vegetables market in the EU', which can be downloaded from <http://www.cbi.eu/marketinfo>

Detailed information about pineapples is given in Appendix A. This survey discusses the EU in general and particularly the markets in Belgium, France, the United Kingdom, Germany, the Netherlands and Spain.

1 Market description: consumption and production

Consumption

Fresh pineapple is one of the products in the EU market for fresh produce that is increasing most rapidly. Total consumption of fresh pineapple in 2007 was 693 thousand tonnes, more than twice as much as in 2003 (+21% annually) (Table 1.1). Germany and the UK are the fastest growing markets.

Large retailers in the EU led the remarkable increase in pineapple consumption by introducing them into their product ranges several years ago. Canned pineapple has been a common product in retailing for a long time.

The introduction of fresh pineapple in the major supermarkets led to a wider group of consumers becoming acquainted with them and resulted in an increase in sales.

Table 1.1 Apparent consumption¹ of fresh pineapple, 2003 – 2007, in thousand tonnes.

	2003	2005	2007
EU27 Total	326	449	693
Germany	55	96	137
Italy	71	93	125
United Kingdom	42	72	111
Spain	53	61	93
France	42	59	71
Portugal	16	23	41
Belgium	13	13	26
Czech Republic	3	7	16
Austria	7	10	13
Denmark	5	7	11
The Netherlands	4	n.a.	8
Poland	0	5	8

n.a. not available

Source: Eurostat (2007,2008)

Germany is the leading consumer of pineapple in the EU, accounting for 20% of EU consumption in 2007. The German market has developed rapidly, with supermarkets being the main outlet. Discounters like Aldi and Lidl have contributed to success by introducing them in their assortment. Consumers in Germany are price-sensitive but do value the quality of fresh produce. Italy is the second largest market in the EU. Italian consumers appreciate tropical fruit, as reflected in the growing sales over the last years. After bananas, pineapples are the most popular tropical fruit in Italy. The UK is the fastest growing market in the EU. Pineapple consumption increased by 164% between 2003 and 2007.

For the coming year demand is difficult to predict due to the looming economic crisis. It is expected that growth will slow down, especially for the higher value market like convenience, organic & fair-trade. England is a fore-runner in the EU as the financial and economic crisis affected the UK earlier. The UK has suffered from substantial job losses since October 2008. Up to the end of 2008 no significant change in demand could be seen, but this is expected in 2009.

Market segmentation

Pineapples are appreciated by people in all EU countries of all ages. It has become a common product in many supermarkets, especially in urban areas. The high-income, western European countries have the highest consumption levels but the low-income, eastern European countries are rapidly moving towards western consumption patterns and demanding more exotic fruits such as pineapples. Southern European countries like Italy, Spain and Portugal already have a long history of consumption of pineapple.

¹ Apparent consumption is calculated as: production + imports – exports. Negative figures may arise because of exports from stocks, delays between imports and exports, or errors in trade statistics.