

Entering the European market for fresh pineapples

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When entering the European market for pineapples, expect strong competition from multinational brands. Costa Rica covers 84% of the market with the MD2 pineapple. As a new supplier, you must focus on the right maturity and find a way to differentiate your product. Supermarkets sell most pineapples in Europe, but the wholesale market can be ideal for specialties.

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1. What requirements and certification must pineapple comply with to be allowed on the European market?

Fresh pineapple must comply with the general requirements for fresh fruit and vegetables. You can find these in the general [buyer requirements for fresh fruit and vegetables](#) on the CBI market information platform. You can also use [My Trade Assistant](#), which provides an overview of export requirements (use code 0804300090 for fresh pineapples).

What are mandatory requirements?

Avoid pesticide residues and contaminants

Pesticide residues are 1 of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental damage, the European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Fresh pineapples containing more pesticides than allowed will be withdrawn from the market. The same goes for other chemical residues and contaminants such as heavy metals.

Note that retailers in several Member States such as the United Kingdom, Germany, the Netherlands and Austria use MRLs that are stricter than the MRLs laid down in European legislation.

Ethephon

Pineapple growers use Ethephon to induce flowering in pineapples. It also helps to 'de-green' pineapples and get them ready for harvest at about the same time. In European production, there is already a restriction on the use of Ethylene products, and it is only allowed for indoor uses.

Imported pineapples with non-European origins are subject to a legal residue limit. The maximum residue limit for Ethephon on pineapples in Europe is 2.0 mg/kg. In organic cultivation, Ethephon is not allowed.

Tips:

- Read about the current legal status of Ethephon use in the [Final Report on Plant Protection IV](#) by the Expert Group for Technical Advice on Organic Production.
- Find out the MRLs that are relevant for pineapples by [consulting the EU Pesticide Database](#) in which all harmonised MRLs can be found. You can search on your product (0163080 'Pineapples') or pesticide used. The database shows the list of the MRLs associated with your product or pesticide.
- Read more about [MRLs on the website of the European Commission](#). Check with your buyers if they require additional requirements on MRLs and pesticide use.
- Reduce the amount of pesticides by applying Integrated Pest Management (IPM) in production. IPM is an agricultural pest control strategy that involves an integrated approach to prevent harmful organisms and keep the use of pesticides within acceptable levels. Read about [Integrated Pest Management \(IPM\) on the website of the European Commission](#).
- Make sure that contamination of lead in pineapples remains below 0.10mg/kg and cadmium below 0.020 mg/kg. The limits must be according to Regulation [\(EC\) 1881/2006 setting the maximum levels for certain contaminants in foodstuffs](#).

Maintain high quality standards

The [United Nations Economic Commission for Europe \(UNECE\) Standard for Pineapples](#) describes the minimum quality requirements for Pineapples. In general, pineapples for fresh consumption weigh 1 to 2.5 kilos and are classified into 3 classes: 'Extra' Class, Class I and Class II. Most of the pineapples sold in the European market are Class I or 'Extra' Class (see Table 1).

In all classes, the pineapples must be:

- Intact, with or without crown; if present, the crown may be reduced or trimmed;
- Sound; produce affected by rotting or deterioration, such as to make it unfit for consumption, is excluded;
- Clean, practically free from any visible foreign matter;
- Practically free from pests;
- Free from damage caused by pests affecting the flesh;
- Fresh in appearance, including the crown;
- Free of abnormal external moisture;
- Free of any foreign smell and/or taste.

When a stalk is present, it must not be longer than 2.5 cm measured from the shoulder of the fruit, and the cut must be transversal, straight and clean.

The development and condition of the pineapples must be such as to enable them to withstand transportation and handling and to arrive in satisfactory condition at the place of destination.

Table 1: Summary of quality requirements of 'Extra' Class and Class I pineapples

'Extra' class	Class I
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<ul style="list-style-type: none"> • Superior quality; • The crown (if present): straight, no side shoots or discolouration and <150% of the fruit length; • Perfectly sound flesh; • Free from defects, or only very slight superficial defects. 	<ul style="list-style-type: none"> • Good quality; • The crown (if present): no side shoots and <150% of the fruit length; • Perfectly sound flesh. <p>It may be:</p> <ul style="list-style-type: none"> • Slightly damaged; • Slightly discoloured; • Slightly curved with a maximum inclination not exceeding 30° from the longitudinal axis of the fruit. <p>Slight defects allowed:</p> <ul style="list-style-type: none"> • A slight defect in shape; • Slight defects in colouring, including discolouration caused by the sun; • Slight skin defects not exceeding 5% of the total surface area; • Slight bruises.
<p>Tolerances:</p> <p>5% may satisfy the requirements of Class I, of which <0.5% satisfies the requirements of Class II</p>	<p>Tolerances:</p> <p>10% may satisfy the requirements of Class II, of which <1% does not satisfy any Class or minimum standards</p>

Source: The [United Nations Economic Commission for Europe \(UNECE\) Standard for Pineapples](#)

Maturity

Because fresh pineapples do not ripen after being harvested, the flavour and sweetness of the fruit is an important selection criterion for importers.

The pineapples must be sufficiently developed and display satisfactory maturity and/or ripeness. The maturity level should be according to the specifics of the variety and the cultivation area:

- The total soluble solids content of the fruit flesh should be at least 12° Brix.
- Fruit that is over-ripe must be excluded from export.
- The skin colour can be green as long as the minimum maturity requirements are met.

Buyers in Europe usually focus on brix levels of between 13 and 17. This depends on the buyer and the end market. Air-freighted pineapples can be exported with higher brix levels.

Figure 1: Pineapple flesh in different stages of maturity



Source: United Nations Economic Commission for Europe (UNECE) [Standard on the marketing and commercial quality control of Pineapples](#), 2013

Maturity requirement: “appropriate degree of maturity and ripeness”. Stages of ripeness: the fruit on the left is

sufficiently mature, provided the minimum Brix level is met.

Figure 2: Commercial classification of external maturity



Source: United Nations Economic Commission for Europe (UNECE) [Standard on the marketing and commercial quality control of Pineapples](#), 2013

Maturity requirement: “skin colour”. Example of colour classification C0 to C4 (peel-colour index) – optional

An optional buyer requirement can be maturity grading by skin colour (see Figure 2). Commercial grading uses codes from C0 to C4:

- C0: fruit is entirely green;
- C1: one-quarter of the fruit begins to turn yellow/orange;
- C2: the fruit is yellow/orange on half of its surface;
- C3: two-thirds of the fruit is yellow/orange;
- C4: the fruit is yellow/orange all over.

Ethylene can be used to de-green the fruit as long as it does not exceed the allowed residue limit. This is common for sweet pineapple production on large-scale farms. It makes the fruit colour uniform and more suitable for retail standards.

Tips:

- Maintain strict compliance with quality requirements and deliver the quality as agreed with your buyer. Being careless with product requirements or stretching the minimum standards will give buyers a reason to claim on quality issues.
- Make sure you have perfectly mastered the grading of quality and maturity. A common mistake is exporting pineapples that are not yet sufficiently matured, which end up as sour fruit in European retail. This gives consumers a bad experience and can hurt the pineapple business. Sometimes, the European client is to blame when it persists in receiving the fruit (too) early. It is better to say no to a buyer when you know that the quality and maturity are not right!
- See the explanatory brochure of the United Nations Economic Commission for Europe (UNECE) [Standard on the marketing and commercial quality control of Pineapples](#) and the [presentation on pineapples](#) with specific and visual examples.
- Maintain an excellent cold chain to preserve quality, using pre-cooling after harvest and storage and transport at the right temperature. The [BMT Cargo Handbook](#) advises 10° to 12° Celsius for mature green pineapples and 7° to 10° Celsius for fruit that are turning (from green to ripe).

Check product size and uniformity

The contents of each package must be uniform and contain only pineapples, with or without crowns, of the same origin, variety, quality and size. The maturity (brix level) must be the same for the whole box. For the ‘Extra’ Class and Class I, uniformity in colouring and length of crowns is also required.

The size is determined by weight. To ensure uniformity in size, the range in size between produce in the same package shall not exceed:

- 300 grams for fruit weighing 1,300 grams or less;
- 680 grams for fruit weighing more than 1,300 grams.

A total tolerance of 20% is allowed for fruit that does not satisfy the requirements for the number or weight.

Commercial sizing is usually a count of the fruit per box. Boxes carry sizes 5 up to 10, filling the box with 5, 6, 7, 8, 9 or 10 pineapples. Calibers 6 to 8 are most demanded by European buyers, in particular in Western European markets.

Packaging and labelling

Pineapples must be packed in such a way as to protect the produce properly. They require strong carton boxes, made from quality cardboard and glue. The packaging is also your business card. Saving money on the boxes will eventually push you out of the market.

The most common packaging for fresh pineapples is open-top cardboard boxes of 12 kg gross weight (net weight approximately 11.5 kg). Smaller pineapple varieties such as the Queen Victoria can be packed in smaller boxes of 4 kg or 5 kg. Consider offering the option to label the fruit individually, as this is a requirement for many retailers (see Figure 3 below).

Tips:

- Always discuss the specific requirements for size and packaging with your buyer.
- For other additional requirements, such as labelling, payment and delivery terms, see the CBI's reports on [buyer requirements for fresh fruit and vegetables](#) and [tips for doing business with European buyers](#).

What additional requirements do buyers often have?

Obtain commonly used certifications

Common certifications for fresh pineapples are [GlobalG.A.P.](#) for good agricultural practices and [BRCGS](#), [IFS](#) or similar HACCP-based food safety management systems for packing and processing facilities. Using management systems recognised by the [Global Food Safety Initiative \(GFSI\)](#) is most highly recommended.

Apply additional sustainability and social standards

Complying with sustainable and social standards has become common for all fresh fruit and vegetables. Besides GlobalG.A.P. to ensure good agricultural practices, a social certificate such as Sedex Members Ethical Trade Audit ([SMETA](#)) is highly recommended to get your product up to retail standards.

In the coming years, the [European Green Deal](#) will influence how resources are used and greenhouse gas emissions are reduced. The new EU policies on sustainability will prepare Europe in becoming the first climate-neutral continent by 2050.

The [Farm to Fork Strategy](#) is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally friendly. It will ensure a sustainable food production and address, for example, packaging and food waste. EU trade agreements, for example with Costa Rica ([Central America](#)), already include rules on trade and sustainable development – other countries are expected to follow. For suppliers of fresh fruit and vegetables, it is important to look ahead of the increasing standards and try to be in the frontline of the developments.

Retailers can also impose their individual standards, such as [Tesco Nurture](#). Especially larger retail chains in Northern Europe will be more prepared to buy your product if your compliance with social and sustainability standards is in order.

Tips:

- Implement at least 1 environmental and 1 social standard. See the [Basket of standards](#) of SIFAV Sustainability Initiative for Fruit and Vegetables.

- For other additional requirements such as payment and delivery terms, see [CBI Buyer Requirements for fresh fruit and vegetables](#) and the [Tips for doing business with European buyers](#).

What are the requirements for niche markets?

Buyers look for better ways to source sustainable fruits

Social and environmental issues are not uncommon in pineapple production. For this reason, you can expect European importers and retailers to demand extra effort from their suppliers in sustainable production. This will, for example, contribute to more [Rainforest Alliance](#) and [Fairtrade](#) certified pineapples in the future.

Use organic certification to increase product value

Organic certification can be an interesting way to set your product apart and market it at a higher value. There is a market for organic pineapples, although the current offer is still limited. Production data and industry experts in Costa Rica estimate the organic production share to be around 1% to 1,5%.

The spraying of chemicals, for example to create a uniform colour shortly before the harvest, is not allowed in organic production. In the commercial production of MD2 pineapples, the use of agrochemicals is very common. Organic production can be an opportunity for smaller, more specialised farms. But even for these farms, it can be difficult to grow organic pineapples and still comply with the quality standards for Europe.

In order to market organic products in Europe, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier. Since January 2022, the new [Regulation \(EU\) 2018/848](#) has come into force. This legislation includes new rules for group certification, new approaches for dealing with suspected non-compliances and residues and new rules at the EU borders for imported products, among other things.

Figure 3: Example of an Italian brand with an organic pineapple from Togo



Source: [ICI Business](#)

Tips:

- Strive for residue-free pineapples, and only certify your production as organic if this is possible for your farm. Organic certification can help market your product in a premium market. But remember that implementing organic production and becoming certified can be expensive. You must be prepared to comply with the whole organic process.
- Download the [up-to-date list of control bodies and authorities](#) to see which certifiers are active in your region.
- Find guidelines and the main changes of the new organic regulation on [IFOAM Organics Europe](#).

Figure 4: Segmentation and indicative retail prices per pineapples



Source: [ICI Business](#)

MD2 and convenience dominate the supermarkets

The mainstream pineapples are imported in bulk. The MD2 from Costa Rica dominates the European supermarkets. The MD2 variety withstands sea freight well and has a good balance between quality and shelf

life. This makes it a very competitive fruit and widely available. Supermarkets are really focused on uniformity in size and appearance. Although several sizes of pineapples are sold in Europe (size 5 to 10), the sizes most sought after by supermarkets are size 7 or 8. The processing industry and the spot market supplying the food service segment may also absorb larger sizes.

A new and growing segment is convenience fruit. Freshly cut pineapples are an excellent way for grocery retailers to sell more fresh pineapples. With this ready-to-eat segment, a new target audience can be reached. Freshly cut is ideal for consumers that look for direct consumption or an easy product.

Occasionally, you will find special varieties or certified pineapples in regular supermarkets, such as whole air-freighted or organically grown pineapple.

Restaurants and specialised stores are a good segment for niche varieties

Although the MD2 is the most popular pineapple, there are opportunities for other sweet varieties, such as Sugarloaf (*'pain de sucre'*) from Benin, Ghana and Togo or the aromatic Queen Victoria from Mauritius or Réunion. All of these sweet, but lesser-known varieties are air freighted and therefore more expensive in the end market. They are mainly sold by specialised greengrocers, sometimes by ethnic shops and in the gastronomic segment. Aromatic and special varieties appear regularly on wholesale markets such as Rungis near Paris.

Other niche and premium pineapples include organic certified pineapples. Organic pineapples can be sold through the regular channels, but there are also several grocery chains that are fully focused on organic food. The organic market share of specialised/organic retailers is between 30% and 35% in most Northern European countries. They include chains such as [Biocoop](#) in France, [Denn's biomarkt](#) in Germany and [Ekoplaza](#) in the Netherlands. Organic pineapples are usually 50% more expensive in retail, or even more when they are shipped by air. Air shipment also allows you to supply smaller volumes to more specialised clients.

Fresh convenience requires internal quality

Freshly cut pineapples are an 'added-value' product and therefore belong to a higher price segment. There will be stricter criteria for the internal fruit colour and Brix level. Pineapples are processed in Europe, and in some cases, freshly cut fruit is directly supplied from origin. In that sense, the fresh processing is a different segment from the canning industry. The latter takes place predominantly in Southeast Asian countries.

In the canning industry, the 'Smooth Cayenne' has been the preferred variety due to its productivity, flavour and square shape. Fresh processing can also make use of other, sweeter varieties, as long as they are easy to process. The more perishable varieties such as Sugarloaf can best be processed in the origin country and shipped by air.

By processing pineapples in origin, you can add value to the product and sell them in high-end markets in Europe. You can also save on the air-freight costs because cut pineapple is exported without the peel and crown.

Crownless pineapple for fresh processing and food service

According to [Fruitrop](#), the trade in crownless pineapple is increasing. It estimates that crownless pineapple represents 20-25% of the market, but exact figures are lacking. Crownless pineapples are most common in the processing and food service sector. Without the crown, you can place more pineapples in a box. The prices per box also tend to be higher. In this segment, you can possibly also more easily sell the larger sizes.

The demand from the food service segment was reduced in 2020 and 2021 due to several lockdowns during the COVID-19 pandemic.

Figure 5: Ripened Smooth Cayenne pineapple by air from Cameroon, sold at an Italian supermarket



Picture by [ICI Business](#).

Tips:

- Use labelling to inform consumers about the sweetness of your pineapple. Many consumers in Europe cannot distinguish between different varieties. You can also add tips to increase the consumer experience.
- Implement all necessary measures to ensure food safety when you plan to supply freshly processed pineapples. Make sure that your cleaning and sanitary procedures are well documented and that your staff members are correctly briefed on hygiene and sanitary procedures. Implement a Quality Management System based on the principles of Hazard Analysis and Critical Control Points (HACCP) such as [FSSC 22000](#), [BRCGS](#), [IFS](#). Processing for the European market is only an option if you are price competitive and if you have the right contacts to sell.
- Find an overview of supermarkets on [Wikipedia's list of supermarket chains in Europe](#) or the [Top 10 Food Retailers in Europe in the Retail-Index](#).

Through what channels does a product end up on the end market?

Most pineapples are sold through mainstream channels: multinational pineapple brands, supermarkets and their service providers. Premium and niche varieties can be sold through specialists and wholesalers that have a good link with the gastronomic sector.

Figure 6: European market channels for fresh pineapples



Source: [ICI Business](#)

Wide range of importers and international specialists

Importers play a central role in the import and distribution of fresh pineapples. They are familiar with all the different requirements of end clients and are able to distribute to different market channels, such as wholesalers, processors and supermarkets.

Direct sourcing and partnerships are important in the pineapple business. For that reason, you will see many importers with a close connection to pineapple growers and brands.

For example, [Total Produce Indigo](#) maintains a large distribution network in France and distributes 'Extra Sweet' pineapples of the Fyffes brand from Costa Rica and Panama. The company [Kraaijeveld](#) represents a Costa Rica pineapple brand with and without crown and resells them in the wholesale and the processing industry. [Staay Food Group](#) works with farmers that grow MD2 pineapples on an area of 1,300 hectares in Costa Rica. The Spanish company [Ramafruit](#) has its own subsidiary in Panama, sourcing pineapples year round.

Also, several specialised importers, such as [Eosta](#), focus only on organic and fair pineapples. The French [Lilot fruits by Capexo](#) and the Spanish [Glamour Fresh](#) offer a wider range, including Victoria pineapples from Mauritius or Réunion and Sugarloaf, for example from Ghana, Benin and Cameroon.

Service providers provide access to supermarkets

Supermarkets are an important channel for fresh pineapples. They usually work with supply programmes and want to buy as close to the source as possible. This gives them control and transparency in their supply chain.

They work with selected service providers that can organise the supply chain according to their needs, from sourcing to (re-)packing and branding. You can become part of a supply programme if you are able to offer the quality, volume and logistics that a service provider and supermarket require.

Integrated pineapple companies such as [Del Monte](#) and [Compagnie Fruitière](#) have a dominant position in the supply to retailers. These companies are known for their pineapple brands. However, in European retail, there are increasing opportunities to supply private label pineapples.

Service providers and supermarkets need each other to move the big pineapple volumes. Because of this, they often have a close relationship or even become an extension of each other. This is the case with service providers and purchase centres such as [Fruit-service](#) (OGL) for Lidl, [Bakker Barendrecht](#) for Albert Heijn, [Eurogroup](#) for Rewe and [Socomo](#) for Carrefour. For example, Bakker Barendrecht and Albert Heijn in the Netherlands have integrated their systems to manage real-time data on sales and supply.

Processors

Processors in Europe that require 'fresh' pineapples mainly consists of companies that provide cutting and packing services. One of the largest companies in fresh convenience is the Dutch company [Vezet](#). This company processes large quantities of fruits and vegetables, for example to pack ready-made fruit salads for the main supermarkets.

European processors are usually very diversified and need partners that organise their supply efficiently and according to their requirements. As a foreign exporter, you will most likely reach these companies through existing import channels.

When you are considering fresh processing yourself, look at successful examples such as the company [Blue Skies](#). This company introduced pineapple that is freshly cut in origin countries such as Ghana.

Wholesalers (spot market)

Most pineapples have a programmed supply. The spot market, mainly managed by wholesalers, has an estimated market share of 20% to 30%. The spot market also helps regulate the pineapple market; surpluses can be sold on the wholesale market, while spot sales can add additional volumes to supply programmes when needed. Traditional fruit wholesalers mainly cover the spot market and move according to the fluctuations of the fresh trade.

Wholesalers have an important role in supplying independent greengrocers, street merchants and restaurants. Sometimes, import and wholesale activities are combined, especially in the case of air-freighted pineapples that are easy to source in smaller volumes. Wholesale markets such as [Rungis](#) near Paris house a high concentration of tropical-fruit wholesalers. Here, you will also find companies that differentiate with premium quality and niche varieties.

Larger, non-specialised wholesalers, or 'cash & carry', such as [Metro](#), cater to a similar end market. They are especially strong in the gastronomic segment. Most of their supply will be sourced via importing partners or purchase centres. Just like supermarkets, they are able to work with long-term contracts.

Tip:

- Select the type of buyer that fits your company and your product. Different target groups will have different preferences. Retailers and their programmed supply will provide you with stability but are most demanding in certification and compliance. The wholesale channel may provide the best opportunities for special varieties and premium pineapples with superior taste.

What is the most interesting channel for you?

The pineapple trade is about choosing your market. If you can supply large and regular volumes of popular pineapple varieties, you can try to find partnerships with major players. You will be working with the mainstream buyers. The buyers that you should aim for are service providers that work with retail supply programmes. These programmes will give you the most stability. When you do enter a supply programme, you must focus on the long term. Prices may be higher on the spot market, but with a programme, you will have less risk of fluctuations, and the average revenue can actually be higher.

However, most exporters will depend on wholesalers. If you are unable to compete in the mainstream market, go for the premium market or find another way to distinguish your product in a positive way. This will be necessary if the sea-freight logistics from your country are not fast enough, or when you cannot comply with the high standards of the main retailers. The best thing to do is to find a specialised importer that knows the premium pineapple market.

Tips:

- Visit trade fairs to find buyers. The most important trade fairs in Europe for fresh fruit and vegetables are [Fruit Logistica](#) in Berlin and the [Fruit Attraction](#) in Madrid.
- Visit wholesale markets such as [Rungis wholesale market](#) in France to find more specialised importers and wholesalers. Visiting wholesale markets will also help you assess the work done by competing origins/suppliers in terms of quality and packaging.
- Read the [Tips for doing business with European buyers of fresh fruit and vegetables](#) on the CBI website.

2. What competition do you face on the European pineapple market?

The pineapple supply is highly standardised, in particular from Costa Rica. Competing in this market means you must be able to match the general quality standard or differentiate yourself with more sustainable or premium pineapples.

Which countries are you competing with?

Costa Rica dominated the European pineapple market with 84% in 2021. Ecuador, Ivory Coast and Ghana follow with market shares of 3 to 4%. These market shares have not changed much in the last 5 years. Costa Rica will remain the principal supplier with the export of the MD2 variety. But there are opportunities to compete with the right timing or a differentiated product.

*Mauritius only exports the exotic Victoria pineapples

Costa Rica

Costa Rica is responsible for about 84% of the European import value of pineapples. In 2021, this value was €631 million.

With the sweet MD2 varieties, Costa Rica has taken over much of the supply from Ivory Coast and other pineapple suppliers in the early 2000s. The MD2 was developed by Del Monte in Costa Rica. It has become the undisputed leader in the fresh pineapple market thanks to its firm skin, sweet taste and transportability. The modern MD2 variety and fast transit times make Costa Rica a strong competitor in sea-freighted pineapples. It has replaced part of the export of traditional varieties such as the Smooth Cayenne.

The MD2 is now also grown in other countries in Africa and Latin America. But it is a capital-intensive crop. Therefore, large and financially strong companies in particular have had success with this variety.

Costa Rica is only a small country, but it is a very important player in pineapple production and export, with over a hundred pineapple exporters and nearly as many packing plants. The ideal climate allows the country to produce pineapples year round. The peak of Costa Rica's supply starts in May. In the few weeks when production is lower, European importers can shift to other supply countries. After the overproduction in 2018, the harvested volumes decreased. This took some of the pressure off the market.

The enormous expansion and monoculture of pineapples on industrial scale in Costa Rica have also raised concerns among European organisations about the sustainability of the crop. Labour circumstances, deforestation and soil degradation have become common subjects of discussion. Only [1.5% of the fresh pineapple export is organic](#) certified. This could provide a competitive advantage for organic growers elsewhere.

Ecuador

In export value, Ecuador is the largest supplier of pineapples to Europe after Costa Rica. In 2021, the export to Europe rebounded to €30 million after a 10% dip in 2020. The main destination countries in Europe are Germany and the Netherlands.

Ecuador is specialised in tropical fruit cultivation and trade, including high-volume fruits such as pineapple and banana. Producers commonly grow the MD2 variety and attempt to compete in quality with Costa Rica. The production is much lower than in Costa Rica, but the few exporters in Ecuador are large and experienced. For example, the company [Terra-Sol](#) has decades of experience in pineapples and merged with French fruit and vegetable importer SIIM (Société Internationale d'Importation). Together, they announced the [world's first 'Zero-Carbon' pineapple](#) in 2021.

Ivory Coast

Ivory Coast used to be the principal pineapple supplier to Europe. Exporters lost most of their market share to the sweeter pineapples from Costa Rica. It has become very difficult to compete against Costa Rica with the sea-freighted Smooth Cayenne pineapples from Ivory Coast.

Europe imports around €25 million of pineapples from Ivory Coast. This is a sharp contrast with the current volumes from Costa Rica, but the diversification has done Ivory Coast some good.

The current supply from Ivory Coast has shifted largely to the MD2 variety, with international companies such as the French [Compagnie Fruitière](#) in the lead. A significant part of the pineapple production still comes from small farmers. It is difficult for them to make large investments. Due to the late variety change, only a few of these producers continue to grow MD2 pineapples for the export market. The remaining producers of Smooth Cayenne have started to focus more on air freight of fully ripened pineapples.

Ghana

Pineapple is 1 of the more developed export fruits in Ghana. Ghana cultivates all the different pineapple varieties that are found in Europe, including Smooth Cayenne, MD2, Sugarloaf and Queen Victoria. Europe is the main buyer of Ghanaese pineapples. Belgium, France, Germany and Switzerland were among the main destinations in 2021.

Ghana exports pineapples both by air and by sea. The majority of sea freight and MD2 pineapples is covered by a select number of exporters. Not all farmers in Ghana have been successful in adopting the more capital-intensive MD2 due to a lack of knowledge and financial resources. They have continued exporting Smooth Cayenne. According to the association of Sea-freight Pineapple Exporters of Ghana (SPEG), [80% of the Ghanaese exports are Smooth Cayenne](#). Pineapple experts contradict this statement and claim that Ghana's sea-freighted pineapples are practically all MD2, complemented by Smooth Cayenne and Sugarloaf by air. However, the vertically integrated company Blue Skies also kept believing in Smooth Cayenne. It is 1 of the major exporters of freshly cut pineapples.

Exporters also try to [promote Sugarloaf in Europe](#), which was the focus during Fruit Logistica in 2022. This sweet variety is mostly sold locally, but it has potential as a premium fruit in Europe as well. When Benin stopped its export of de-greened pineapples in 2016/2017 when it was facing high-residue issues, Ghana seized the opportunity to start both green and de-greened Sugarloaf pineapples. Ghana also has a good supply during the peak demand in Europe in December. The Christmas period provides opportunities for premium air-freighted pineapples.

Kenya

Kenya is an upcoming supplier of pineapples to Europe. This is mainly because of recent developments by the Del Monte company. Del Monte has invested in fresh packing facilities to expand into Europe with the [air freight of their Del Monte Gold® Pineapple from Kenya](#).

In 2020 and 2021, Europe, for the first time, imported a significant value of Kenyan pineapples of over €5.5 million. This new trade will potentially pave the way for other suppliers of premium pineapples in Kenya. However, it remains to be seen how much success smaller growers will have while bigger companies dominate most of the market.

Mauritius

Mauritius has made a name for itself with the Queen Victoria pineapple export to Europe. It is a specialty market that does very well during the Christmas and Easter holidays. France is by far the largest importer of these pineapples.

Supply and demand are somewhat irregular. Generally, the export value from Mauritius to Europe goes up to €5 million on an annual basis. Due to the COVID-19 pandemic and flight restrictions, the export dipped in 2020.

The main competing countries for this special Victoria, besides Mauritius, are Réunion and South Africa. The export of Victoria pineapples from producers in Ghana, Sri Lanka, Thailand and the Philippines is estimated to be minor.

Tips:

- Look beyond your borders and monitor the seasons and issues in other production countries. Always be ready to supply pineapples when other countries cannot.
- Work with the pineapple varieties that you know best and that do well in your area. Experiment with new varieties first before completely turning to another type of pineapple. The learning process can be expensive, which has been the case for several [Ghanese farmers that shifted to MD2](#).
- Find out how to enter the market, specifically when [exporting fresh pineapple from West Africa to Europe](#). The CBI Market Information platform offers more detailed information for exporters from West Africa.

Which companies are you competing with?

The pineapple trade is mainly a business of big brands and multinationals. There are also independent competitors with strong partnerships and large-scale, well-financed operations. To compete with these companies, you must be able to match their supply on all levels, from technological aspects to quality consistency.

Multinationals dominate the pineapple trade

Vertically integrated companies dominate the worldwide trade in fresh pineapples. Companies such as [Del Monte](#), [Dole](#), [Chiquita](#) and [Fyffes](#) have a strong brand value. [La Compagnie Fruitière](#) has managed to integrate its supply with production in Africa. These companies have their own plantations, packing houses, cold storage and even shipping lines.

La Compagnie Fruitière: compete or integrate?

[La Compagnie Fruitière](#) is 1 of the main pineapple companies with production in Africa. Its pineapple brand SCB Ana'dou is of the MD2 variety. It recently introduced the SCB Ana'dou 'Supreme' in 2019, which is a premium pineapple that is harvested at full maturity. Being a French company, it is well established on the French market, but it also supplies other countries around the world.

The company is completely vertically integrated. It owns plantations in Ivory Coast and Ghana and has its own shipping line: Africa Express Lines. As an (African) producer, you have the option to compete with large companies such as this or find a way to integrate with them.

Grupo Acón: independent competitor

The Acón Group ([Grupo Acón](#)) is 1 of the main independent pineapple suppliers in Costa Rica. Grupo Acón produces over 3,500 hectares of pineapple on 4 farms in Costa Rica, certified under high national and international standards. It produces and ships Golden Extra Sweet pineapples (MD2) to various countries in Europe.

It is possible for (large) independent suppliers to compete with the major brands, as long as the product is competitive in price and quality. For these suppliers, it may be interesting to sell as private labels for supermarkets and avoid brand competition with big names such as Del Monte and Fyffes.

Terra-Sol: growth through partnership

The company [Terra-Sol](#) cultivates about 1,300 hectares of different crops in Ecuador. It is also GlobalG.A.P., Rainforest Alliance, BASC and BCSI (Business Social Compliance Initiative) certified.

The company has successfully adopted the MD2 variety and developed into a supplier with high quality standards. [Terra-Sol](#) is the largest producer and exporter of Ecuadorian pineapples.

By merging with the French fruit and vegetable importer SIIM (Société Internationale d'Importation), it has gained a strong position on the European market. Their relationship resulted in several innovations such as the adoption of reusable and recyclable packaging and a carbon-neutral pineapple certified by TÜV Rheinland.

Tips:

- Try to avoid competition with the dominant pineapple companies. Focus on niche markets, such as socially responsible fruit, organic or environmentally friendly pineapples or specialties such as baby pineapples (Queen Victoria).
- If you are a producer and have difficulty distinguishing your product or lack marketing strength, consider joining or supplying a multinational or integrated pineapple operation.

Which products are you competing with?

Since the introduction of the MD2 variety, the pineapple market in Europe has almost completely shifted to this variety. The MD2 has a higher sugar content and is less acidic than the Smooth Cayenne. Its colour is usually more appealing to European customers, and it is more suitable for sea freight. For these reasons, the MD2 has pushed much of the Smooth Cayenne out of the fresh pineapple market. However, traditional consumers sometimes still prefer the Cayenne variety because of its typical pineapple taste. There is also some competition from air-freighted Sugarloaf and Queen Victoria (mini pineapples), but this is almost a different segment that runs well during special holidays.

Sea-freighted and air-freighted pineapples can also compete with each other. Because of the COVID-19 pandemic, freight has become less reliable. But in the past years, sea freight has become faster and more efficient for pineapple traders. Therefore, pineapples can be shipped almost fully ripened by sea. This way, they

are almost as fresh and sweet as air-freighted pineapples.

In the European summer, pineapples have to compete with local seasonal fruits such as strawberries. This results in a reduced demand for pineapples.

Tips:

- Stay up to date with varietal developments and preferences. Check with your European buyers what they see happening in their market.
- Check the [seasonal calendar of northwest Europe](#) to see which local summer fruits are possibly competing with your pineapples. Where possible, try to plan around these seasons or export when prices for local seasonal fruit are still high.

3. What are the prices for fresh pineapples on the European market?

Pineapple prices fluctuate throughout the year, depending on supply and demand. The quality and variety also influence the value, but the biggest influence on the final market price is the type of transport. At wholesale level, air-freighted pineapples sell for a much higher price than pineapples shipped by sea.

The import prices for a box of pineapples generally fluctuate between €6 and €8/€9 (Cayenne/MD2). Air-freighted pineapples are much more expensive due to transport costs but also seem to be more price stable. Pineapples by air are imported for around €2.20 to €3.50 per kilo. The highest prices are paid for Victoria pineapples. The prices for imported tropical fruits are expected to remain higher than in previous years due to inflation and rising freight costs. Higher air-freight rates have turned pineapples by air into a true luxury item. Retail prices for pineapples vary between €1.50 and €2.50 per kilo, and air-freighted fruits sell roughly between €4 and €8.

Importers usually calculate a minimum profit margin of 8% in addition to their commercial costs such as customs clearance and inspections. When selling on a minimum-guaranteed-price (MGP) or consignment basis (commission based), you can ask about the profit and cost structure of your importing partner.

Tips:

- Find a [price history of pineapple \('ananas'\) in France on the Market News Network of FranceAgriMer](#) from wholesalers ('grossistes') and retail ('détail').
- Use [Fruitrop](#) as a source for prices and developments on the pineapple market.

This study was carried out on behalf of CBI by [ICI Business](#).

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