

The European fresh pineapple market

Costa Rica takes over

The swing was long-expected and it is far from being a scoop for anybody. In 2003, Costa Rica became the leading supplier of fresh pineapple to the European market, with a 43% market share. Shipping only a third of supplies, Côte d'Ivoire lost the leading position that it had held for decades.

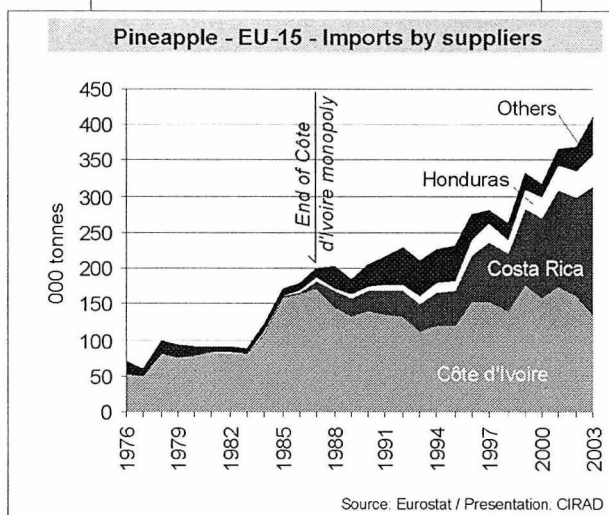
The time when Côte d'Ivoire pineapple reigned unchallenged is long gone. The increase in shipments from Latin America, and especially Costa Rica, from the end of the 1980s put more and more pressure on the West African origin. After an attempt with the Champaka variety that will be remembered as a failure or a mixed success (according to the observer), Del Monte and its MD-2 or extra sweet pineapple has been gaining market shares in Europe since the mid-1990s and took the lead in 2003, as it had done long before in the United States. The success of the combination *commercial effectiveness + innovative variety* is a textbook case. In less than ten years, Del Monte's MD-2 progressed from being an outsider to the absolute reference. The commercial success has been such that MD-2 has been distributed in all production zones, including West Africa.

While Smooth Cayenne, the spearhead of the entire world fresh (and processed) pineapple export industry led for several decades, extra

sweet and a bunch of cousins—mega, super, giga and tera sweet—took 15 years to move from a strong development phase to market maturity. The life cycle of pineapple has accelerated impressively, even encouraging Del Monte to envisage the enlargement of its varietal range, doubtless more quickly than planned.

precipitate the renewal of the range. If it had remained in the same hands, the variety would not have displayed this premature wear. This contrasts completely with the development of the Pink Lady apple (see box).

Is there life next to MD-2?



And what about Smooth Cayenne in all this? Elbowed out to second place, it is nonetheless not finished. It has the very valuable advantage of possessing intrinsic organoleptic quality. Often badly treated, it has lost much of its credibility with supermarket buyers and wholesalers in Europe. It can be considered that its life cycle is over. However, some people feel that it still has substantial potential that was expressed in the past but now largely forgotten. The return to cultural, logistic and commercial practices that respect the fruit

could give it another chance. Efforts have been made in this respect. However, MD-2 and its copies are gaining ground and Côte d'Ivoire, the centre for Smooth Cayenne, is also experiencing a worsening political and economic situation. We hope that the attempts to renew the range available, wherever this is done, lead to commercial success. Beyond the simple defence of commercial positions, it is encouraging to see that the introduction of a new variety gave new life to the European market. The latter increased by 11% in volume (+ 41 000 tonnes) between 2002 and 2003 alone. It would be sad to see a return to a monolithic pineapple market of the type that existed fifteen years ago ■

Denis Loeillet, CIRAD-FLHOR
denis.loeillet@cirad.fr

The example of Pink Lady

This sector was constructed on of the principles of exclusive ownership rights and vigorous defence of these. Mastery of dissemination of the product and hence of the innovation makes it possible to lengthen its life cycle and hence spread out expenditure on R&D and promotion. The next innovation is not something to put up with, as is the case with pineapple, but something that is managed in the interest of the entire range.

Honey Gold is announced as the successor to MD-2 and should be put on the market in 2006.

Del Monte has undeniably participated in one of the finest success stories of the fruit and vegetable sectors. The factors in this success have been a transnational corporation, a new variety, agricultural and technical mastery, post-harvest robustness, a very efficient commercial system, stable quality, diversified outlets (Europe and the United States) and finally a certain opportunism with regard to the difficulties in the Côte d'Ivoire pineapple sector.

Only one thing is missing from this idyllic scene—exclusive ownership of the variety. This weakness in Del Monte's development plan will