

MARKET PROFILE

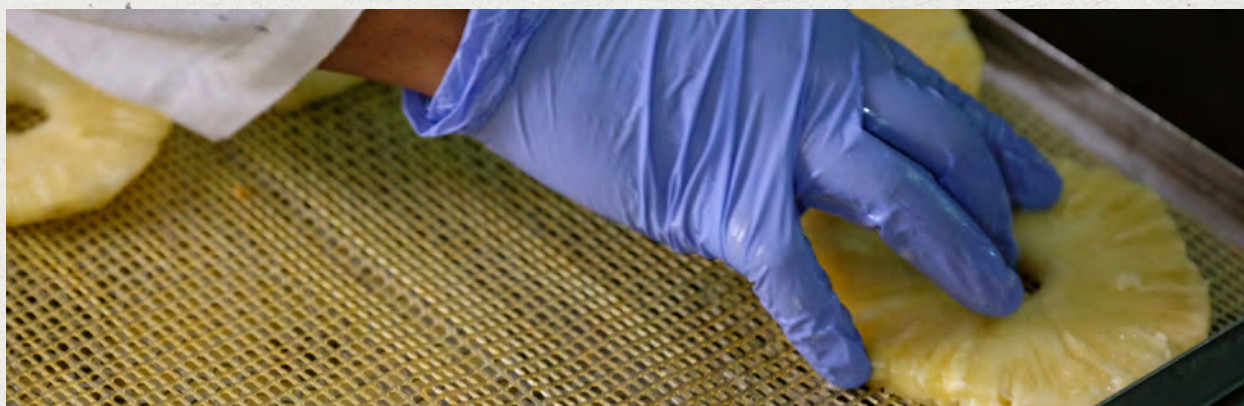
Market profile

Processed Pineapples
in Guinea



COLEACP

Subject of the study:	Three processed pineapple products (dried pineapple, juice and syrups) on the Guinean, West African and European markets
Date :	October 2021



This market profile was produced as part of the activities of the COLEACP Market Intelligence Service and the Fit For Market and Fit For Market SPS programmes, funded by the European Union and co-financed by the Agence Française du Développement (AFD) for the Fit For Market programme. This document is disseminated in the framework of the development cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union.

The Comité de Liaison Europe-Afrique-Caraïbes-Pacifique (COLEACP) is a non-profit inter-professional association of the private sector, created in 1973 by actors of the international fruit and vegetable trade. A network of companies, professional organisations and experts committed to inclusive and sustainable agriculture, COLEACP supports sustainable and inclusive private and public sector development through technical cooperation and capacity building programmes in 50 ACP countries, funded by international donors (mainly the European Union).

COLEACP's mission is to develop an inclusive and sustainable trade in agricultural and food products (especially fruit and vegetables), primarily in African, Caribbean and Pacific countries and between these countries and the European Union. More information is available on [our website](#).



I. SUMMARY

The main objective of this market profile is to determine the market opportunities for a selection of three processed pineapple products (dried pineapple, juices and syrups) in the Guinean, West African and European markets. This study mentions some of the players in the processed pineapple market. More details on the main players in the local market can be requested from COLEACP.



Ranked among the top ten products in Guinea's 2019¹ National Export Promotion Strategy (NES), pineapple is one of the priority commodities in the agricultural sector recovery program, for which significant efforts have been made by the Guinean government in recent years. This is why, despite the sharp decline in African pineapple exports to the EU that has been going on for more than ten years due to strong competition with the MD2 variety exported from Costa Rica and other Latin American countries, Guinea is positioning itself according to a different approach aimed at developing the Baronne De Guinée variety for more interesting niche markets. Moreover, for a sustainable performance, the valorization of the production of unsaleable pineapples in the fresh state for the local, regional (West Africa) and European markets is one of the concerns of the actors engaged in the strategy of revival of the sector in Guinea.

The analysis showed the following trends:

On the local and West African markets :

- The local and sub-regional **dried pineapple** markets are growing slowly as this product is particularly consumed in urban areas where there is sufficient purchasing power to buy it.
- The markets for locally produced pineapple **juice** and **syrup** from fresh fruit are not an opportunity for new players because of the presence in these target markets of imported juices or drinks or those made from concentrate by local industries. These products are also marked by strong competition at the sub-regional level from Benin and Ghana and problems of competitiveness linked to various constraints at the processing and marketing levels.

On the European market :

- **Dried pineapple** is in the same category as fresh pineapple when it comes to analysing statistics, so we cannot draw any conclusions. However, we are able to assess the general trend in the consumption of dried tropical

¹ ACP-EU TradeCom II PROGRAMME "Appui à l'amélioration des capacités institutionnelles et techniques en matière de formulation, de mise en œuvre et de suivi des politiques commerciales de la Guinée"

fruit. According to the CBI analysis, a stable growth in the volume of European imports of 5-6% is expected for the coming years.² The UK and Germany stand out as the two largest markets for dried fruit.

- Europe is a large and growing market for tropical fruit juices, the most imported of which is pineapple juice. The main suppliers of pineapple juice to Europe are Thailand and Costa Rica. Intra-European trade in pineapple juice is also important as many countries import less processed forms which they re-export as pineapple juice.

The pineapple value chain (VC) is still underdeveloped in Guinea but offers interesting prospects for the Guinean agricultural economy, provided that the stakeholders mobilize to strengthen it.

With an interesting added value on the niche markets that are developing in the sub-region and internationally, Guinea should be more interested in the Baronne de Guinée variety, which it could make its trademark. This variety has enough assets to be part of the agro-industrial dynamics promoted by the national authorities and their partners, as it is also the variety most used in Guinea for processing. However, much remains to be done to improve the coordination of actors, reduce the costs of certain inputs, better integrate the value chain into a quality approach and also develop the national market.



² CBI - The European market potential for dried tropical fruit (2021) <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/dried-tropical-fruit/market-potential>

II. SUPPLY

Pineapple is one of the sectors on which Guinea can build to improve its export earnings, in addition to coffee, cocoa and cashew nuts. It also represents a source of income for farmers and one of the sectors in which young graduates can build their future. It is aware of these advantages that the Guinean government has made it one of the priority sectors in its programme to revive the agricultural sector.

For some years now, the government, with the support of its technical and financial partners, has been making significant efforts through projects to improve the performance of the pineapple sector and promote its growth by stimulating its contribution to industry, regional trade, exports and job creation.

2.1 Presentation of the main processed pineapple products

The pineapple-based processed products selected for this profile are dried pineapple, pineapple juice and pineapple syrup. These products were selected for this profile because of their relevance to Guinea. They are either produced in this country or have a significant market locally and regionally. Canned pineapple, although an important product in the processed pineapple market, was not included in this profile because it is not (yet) produced in Guinea. Pineapple production in Guinea is not sufficiently constant and is too small in quantity to ensure the production of this type of product. In addition, it does not have as much of a place on the local market as the other selected products.

2.1.1 Dried pineapple

Dried pineapple, like all other dried tropical fruits, is a product prepared from ripe fruit, transformed by drying in the sun or by any other recognised dehydration method, with or without sweeteners (such as cane sugar) and food additives. Sliced and dehydrated, dried pineapple has the advantage of being

rich in sugar while remaining very light. This makes it, for example, an excellent choice of snack for athletes.

In addition to the benefits of the fruit, dried pineapple contains up to 5 times more minerals than fresh pineapple (potassium, calcium, magnesium, iron). Dried pineapple also has a higher fibre concentration than fresh fruit, which can help reduce cholesterol absorption. Dried pineapple can also be used in meat and fish dishes or in desserts.

In the Harmonized System (HS) statistics, dried pineapples are in the same category as fresh pineapples (HS 080430), so it is generally difficult to distinguish between them.

Regarding the variety of pineapple used, the Baronne De Guinée is preferred to the Cayenne Lisse for its aroma, taste and texture. This variety is the most used in processing in Guinea. The country has the capacity to expand pineapple cultivation and could fill a niche in the organic market, which is in high demand. The Baronne De Guinée variety has enough assets to be part of the agro-industrial dynamics promoted by the national authorities and their partners. However, much remains to be done to improve the coordination of actors, reduce the costs of certain inputs, better integrate the value chain into a quality approach and also develop the national market.

2.1.2 Pineapple juice

Pineapple juice is a drink prepared from fresh pineapple or pineapple concentrate (usually imported by industries). It can be consumed by the general public as a refreshing drink, pure or in cocktails (including the famous pina colada, originating from the island of Puerto Rico). By the presence of bromelain, pineapple juice has proteolytic properties (endopeptidase, hydrolase) used industrially to tenderize meat for example.

Pineapple juice is the third most consumed juice in the world, after orange juice and tomato juice.

For quantitative data, we use the following category of pineapple juice with a Brix value below 20: HS 200941 “Pineapple juice, unfermented, Brix value \leq 20 at 20°C, whether or not containing added sugar or other sweetening matter (excluding alcohol)”.

2.1.3 Pineapple syrup

Pineapple syrup is a thick, viscous liquid, served with water as a drink, often served very cold. Because of its richness in nutrients, the syrup constitutes an energy drink with strong added value to be recommended within the framework of the nutrition of the organizations in progress such as the young people and the people with the high physical activities.

For this type of product, we use category HS 200949 “Pineapple juice, unfermented, Brix value $>$ 20 at 20°C, whether or not containing added sugar or other sweetening matter (excluding alcohol)”, with a Brix value greater than 20. This category also includes “pineapple juice concentrate”, which is created by heating pineapple juice to evaporate the water and retain a puree output. This puree is then transported and re-processed into “pineapple juice from concentrate”.

Pineapple syrup is often made from pineapple concentrate (about 15-18% of the syrup).

2.2 The main Guinean producers and exporters

Apart from the production of pineapple juice and recently industrial dried pineapple, only a few artisanal and semi-industrial units are involved in the production of juice and other pineapple fruit derivatives such as dried pineapple, pineapple syrup, pineapple jam or exceptionally pineapple confit. In the production and marketing of pineapple-based products, there are more than **ten companies** in Guinea, detailed in *Appendix 1*.

However, few of them export their products. Of the ten companies contacted, only three are active in the export of dried pineapple to regional and international markets (Morocco,

Europe and the United States): Tropicaux, KDF and EFK.

Of these three companies, the only one with a significant volume of dried pineapple exports is Tropicaux (about 20 tonnes of dried fruit per year) to the American market. Its export development objective for its dried fruit production (pineapple, mango) is to process 3,000 tonnes of fresh fruit per year. The capacity of its industrial unit in Friguigbé (Kindia) is 10 tonnes of fresh fruit per day. This company is also interested in the possibility of organic cultivation, in particular for the Baronne de Guinée variety.

2.3 Supply of main processed pineapple products

The Guinean supply of products (dried pineapple, juice, syrups and concentrate) based on processed pineapple or pineapple derivatives consists of **local and imported products**. However, while the imported products are essentially industrial, the local products are mostly manufactured in a **traditional and semi-industrial manner**. Diversification is therefore apparent in terms of origins, but also in the manufacturing system.

The types of locally processed pineapple products are still limited and the distribution channels are not well defined. According to the Product-Market Combinations (PMCs), three categories of products obtained from primary processing have been selected for this study. These are :

- **dried pineapple** for local, regional and international markets
- **juices**, mainly for the local and regional market;
- **syrups**, mainly for the local and regional market;

These three niches are slowly developing in the Guinean agri-food sector, particularly with women’s associations, SMEs and industrial enterprises.

The supply of **dried pineapple** is mainly oriented towards **the local market and the USA**. Since the product is easy to preserve, this supply is available throughout the year. The quality of dried pineapples varies greatly due to the different drying techniques (sun drying, electric drying, etc.).

One example of artisanal pineapple processors is the Kindia Women's Processing Cooperative "Kania Donsé Fanyi (KDF)" which produces 300 kg of dried pineapple every three months and has little knowledge of processing techniques. Another company, Fatou & Kadidja (EFK), has a solar unit producing dried pineapple (300 kg per year) in bags, pure pineapple juice obtained after extraction of the pineapple juice (200 litres per year) in glass bottles and syrup (500 litres per year) in glass bottles, as well as a semi-industrial unit, with a capacity of 2 to 5 tonnes of fresh products per day during good production periods. This company makes quality one of the bases of its production policy. It applies a systematic quality control of its products (mould, micro-organisms, organoleptics, moisture content and Brix degree).

The volumes of processed pineapple products (**dried pineapple** and **juice**) marketed in Guinea and abroad have **remained almost insignificant** since the Salguidia factory was shut down between 2013-2014, during the Ebola epidemic. However, volumes have **started to increase** since 2020. This is the result of the start of dried fruit production activities by the company Tropicaux after the installation of its industrial unit in Friguigbé (Kindia). Part of the production will come from organic cultivation, which is being set up thanks to COLEACP's technical assistance on organic pineapple production and packaging techniques, with a view to exporting (mission to Guinea in May 2021 by Mr Jean-Pierre MBA, COLEACP expert).

2.4 Guinea's exports and imports

As in 2019, **dried pineapple** remains the **main processed pineapple product exported to the international market** from Guinea. Other

by-products including pineapple juice and syrup are mainly positioned on the local and sub-regional market.

Regarding **pineapple juice exports from Guinea to the rest of the world**, there is actually very little international trade data. In 2008, only 11 tonnes of juice were exported to France. In 2011, 42 tonnes to Lebanon. In 2017, 2018 and 2020, extremely small quantities (less than one tonne) were recorded in Eurostat for Belgium. This confirms that current Guinean production of pineapple juice and syrup is mainly oriented towards domestic markets.

Export prospects are good with the relaunch of the activities of the Salguidia agro-industrial unit, whose main product is pineapple, taken over in 2020 by the Guineo-Emirati Agro-industrial Company (SAGE-SA). The revival of this factory was made possible by a partnership between the Guinean state and the Abu Dhabi-based venture capital and development company Alsa Asset Management Ltd. This company will take over the assets of the former Salguidia and create one of the most efficient industrial units in the sub-region and should fill a huge gap in this sector in Guinea. The company SAGE has more than 2,200 hectares of agricultural land of the former Salguidia, cultivated in pineapple and other market garden products, as well as units of conditioning, transformation and packaging for the marketing and export of finished products. It will produce and export fresh fruits but also fruit juices, some of which are organic with a laboratory certifying the quality for export to the international market. With regard to **Guinea's imports**, the main processed pineapple products imported are **juices and concentrates** used by local agro-industries. These products are intended for local consumption and represent part of the supply to consumers, but they are also used as semi-finished products for processing and packaging by some local companies. After a sharp drop in quantities in 2015, which could be due to the effects of the Ebola crisis and the closure of the Salguidia factory, a new growth in juice imports has been observed over the last 5 years. These imports are

made up of **pineapple juice** (brix value < 20), representing 68% of the cumulative import volumes of pineapple juice (all brix values) over the last 10 years, and concentrated juice or **syrup** (brix value > 20), which represent the remaining 32% of the cumulative import volumes. **Pineapple juice** is mainly imported from **the European Union** and other European

countries (76% and 8% of cumulative import volumes respectively) and from sub-Saharan Africa (12%), while **syrup** is mainly imported from the **Middle East** (43%), **Asia** (41%) and North Africa (7%). The detailed breakdown between countries of origin can be seen in Figure 2.

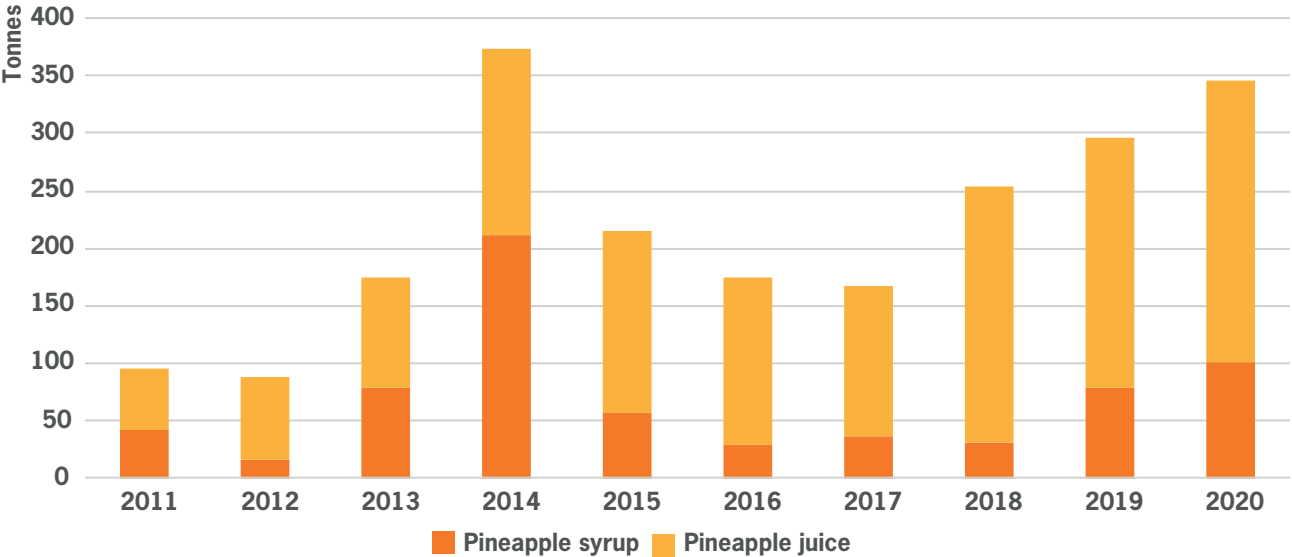


Figure 1: Guinea's imports of pineapple juice and pineapple syrup from the rest of the world, 2011-2020.
(Source: COLEACP based on Eurostat, IFPRI, CEPII BACI, UN-Comtrade and national statistics)

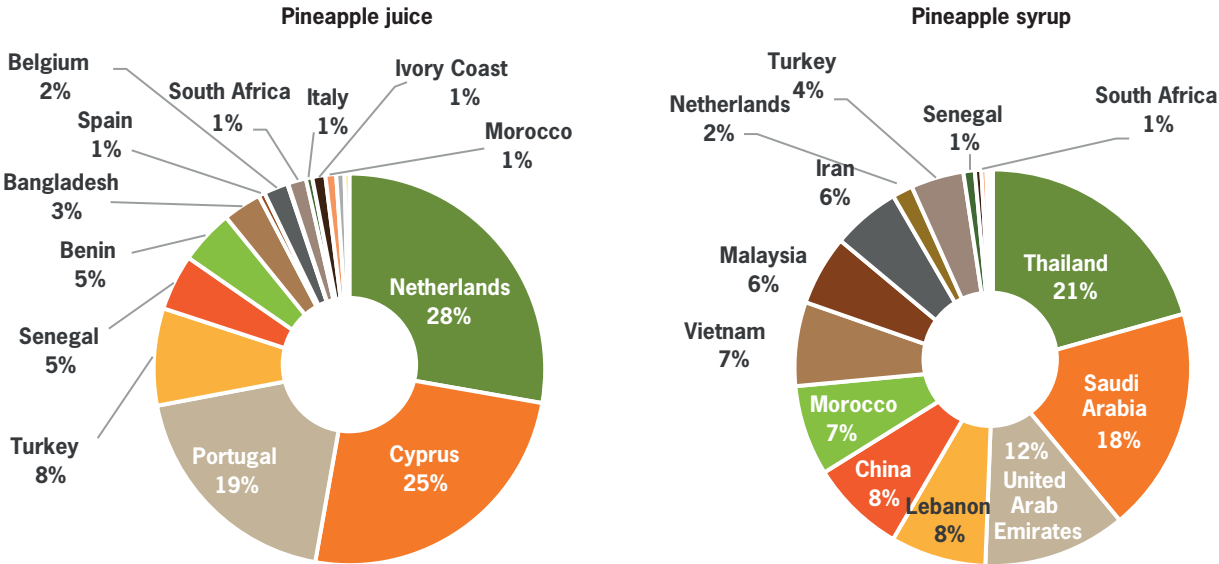


Figure 2: Origins of pineapple juice and pineapple syrup imports into Guinea, cumulative share over 10 years, in volume
(Source: COLEACP based on Eurostat, IFPRI, CEPII BACI, UN-Comtrade and national statistics)

III. DEMAND

The development prospects for processed pineapple are more difficult to assess than those for fresh pineapple because of fluctuations in the purchase price from producers. The less concentrated nature of the processed sector compared to the fresh sector favours more competition between the main Asian origins sharing the industry. The demand for processed pineapple is large, but more volatile than for fresh pineapple due to the vagaries of production and price variation³. This demand differs from one segment to another⁴.

3.1 Trends for the various markets

3.1.1 Local market

Dried pineapple is not yet very popular in Guinea. It is **not widely consumed**. Currently, it is consumed particularly in urban areas where there is sufficient purchasing power to buy it. On the other hand, domestic demand for **fruit juice** is generally **increasing due to** population growth, urbanization, improved living conditions and the needs of an evolving processing industry.

3.1.2 Sub-regional market (West Africa)

Dried pineapple and **juices** are the by-products of pineapple that are sold on the various markets of the sub-region. Ghana and Benin are the main countries that sell their products on this market. In Benin, the majority of processors sell on the local market only and 47.3% export these by-products to the Hinterland markets: Burkina-Faso, Nigeria, Niger, Ghana, Mali and Senegal, while selling on the local market. In Guinea, the dried pineapple “Baronne de Guinée” is also sold to Morocco.

Ghana has the largest share of **dried pineapple** production and export thanks to investments by the Swiss company HPW, which is Ghana’s

largest pineapple processor as well as one of the most important suppliers of dried pineapple to Europe.

Pineapple juice is widely consumed, especially in bars and restaurants in the cities of the sub-region, and is also sold in grocery stores in these cities. Despite the absence of statistical data on the volumes offered, **imported** or **locally manufactured pineapple juice** appears to be the **leading product** on the local and sub-regional market because of the presence of the beverage in all places of mass consumption (family and religious ceremonies), restaurants, street and domestic commerce. Next in importance are **artisanal products** (pineapple juice and syrup, dried pineapple) made by women and other producers, either individually or in groups.

3.1.3 European market

It is difficult to differentiate all types of processed pineapple in the available statistics. The different Harmonised System codes used for each category are indicated in the section “presentation of the main products”. The evolution of imports into the EU28 of the three categories studied are shown in Figure 3.

European imports of processed pineapple have rather constant respective trends. The category gathering fresh and dried pineapple noted a decrease between 2019 and 2020, but juices and syrups have been growing rather steadily for 10 years.

For the **fresh and dried pineapple** category, in 2020 the main European **importers** are the Netherlands (301,564 tonnes), Spain (151,447 tonnes) and Italy (136,111 tonnes). The main **supplier** to the EU27 is Costa Rica (663,009 tonnes representing over 87% of extra-European imports in 2020), the second supplier being Ecuador with only 33,800 tonnes (4.48%).

³ INFOCOMM and UNCTAD - Pineapple, a commodity profile (2016)

⁴ FAO - Market analysis of key tropical fruits (2018)

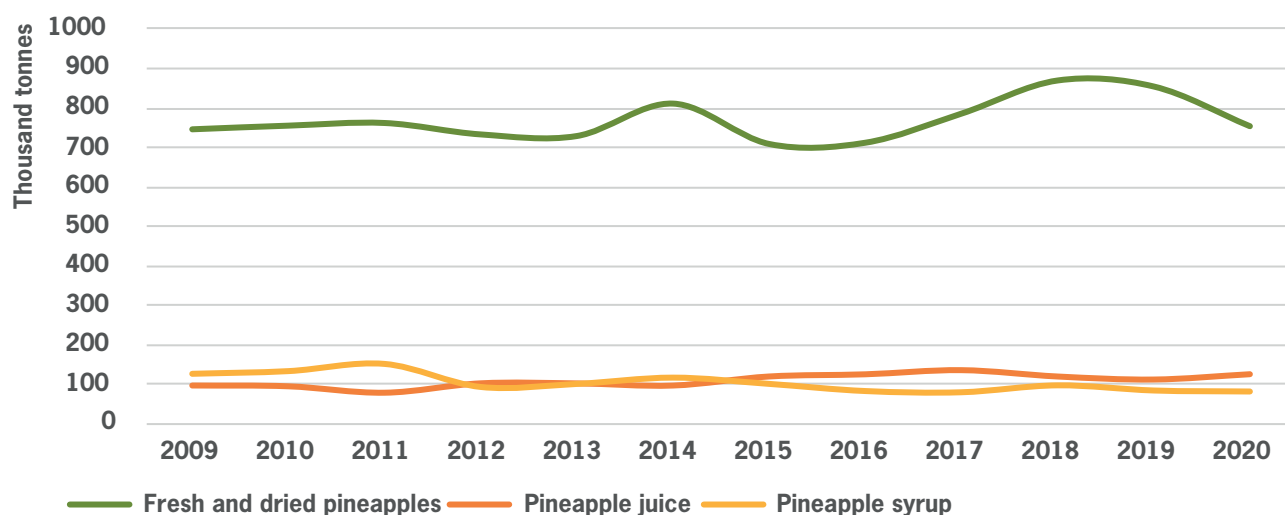


Figure 3: Evolution of processed pineapple imports into Europe (in thousand tonnes) from the rest of the world, 2009-2020 (Source: COLEACP from Eurostat)

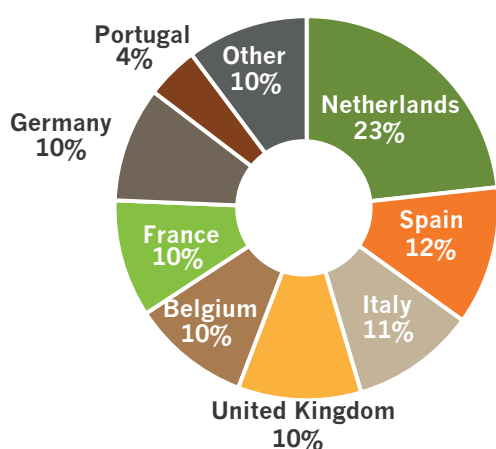


Figure 4: Distribution of fresh and dried pineapple importing countries (in tonnes) in 2020. (Source: Eurostat for the EU27, and UK Trade Info for the UK)

Intra-European trade accounts for a significant share of the trade in fresh and dried pineapple in Europe, although European production is negligible. For example, including re-exports from European countries, Costa Rica's imports represent only 57% of imports in 2020. The main re-exporting countries are the Netherlands (161,417 tonnes), Belgium (84,206 tonnes), Germany (41,210 tonnes), Spain, Italy and Portugal.

Guinea is only 35th in the ranking of total extra-European imports. If we consider **Sub-Saharan African** countries, Côte d'Ivoire, Ghana, Kenya, Togo, Cameroon and Benin are in the top 15 extra-European suppliers, exporting mainly to France and Belgium.

However, these data mainly reflect the fresh pineapple market and reveal little about dried

pineapple. However, according to the CBI analysis, a steady growth in European import volumes of 5-6% is expected in the coming years; the UK and Germany appear to be the largest markets for dried fruit.⁵

Europe is a large and steadily growing market for tropical fruit juices, the most imported of which is **pineapple juice**⁶. In 2020, the EU27 countries **importing** the most pineapple juice are the Netherlands (87,180 tonnes), France (41,532 tonnes), Germany (36,647 tonnes) and Belgium (30,471 tonnes), accounting for more than 75% of imports. As for fresh and dried pineapple, the main **supplier** is Costa Rica (116,534 tonnes representing 92% of extra-European imports in 2020), followed by the Philippines (3,000 tonnes and 2.4%) and Thailand (2,400 tonnes and 1.92%). Guinea is not listed among the suppliers. If we consider the **SSA** countries, Côte d'Ivoire (Europe's 4th largest extra-European supplier, 1,491 tonnes), Togo and Madagascar are in the top 10 extra-European suppliers, but account for only a small percentage of European imports.

5 CBI - The European market potential for dried tropical fruit (2021) <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/dried-tropical-fruit/market-potential>

6 CBI, 2021. What is the demand for processed fruit and vegetables on the European Market? <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/what-demand>

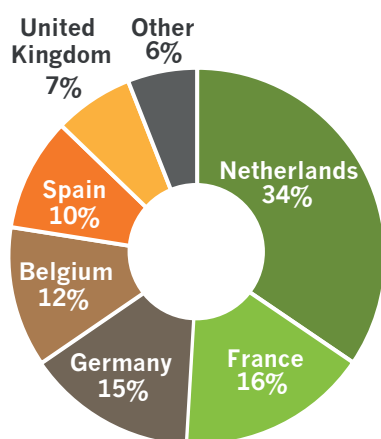


Figure 5: Distribution of pineapple juice importing countries (in tonnes) in 2020. (Source: Eurostat for the EU27, and UK Trade Info for the UK)

Intra-European re-exports are also important for pineapple juice, as European countries import pineapple juice concentrate or puree and use this raw material for processing and re-export. The Netherlands (58,860 tonnes), Germany (17,386 tonnes) and Spain (8,869 tonnes) are the main hub countries.

Finally, for **pineapple syrups**, the leading country for EU **imports** in 2020 is the Netherlands (65,290 tonnes), accounting for 47% of imports alone. Spain (15,851 tonnes), Italy (12,288 tonnes) and France (10,195 tonnes) are next, accounting for around a quarter of syrup imports. Europe's **suppliers** are more dispersed than for the two previous categories. The main non-European exporters to the EU27 countries are Thailand (23,828 tonnes representing 29 % of extra-European imports), Indonesia (13,311 tonnes and 16 %) and Costa Rica (10,963 tonnes and only 13 %). It is interesting to note that despite the very important presence of Costa Rica in all categories, this country exports less pineapple

syrup (juice with Brix value > 20) and that the market is therefore slightly more open. If we consider only **SSA**, Guinea is not present and Kenya accounted for 94% of pineapple syrup exports from SSA to Europe in 2020 with 7,955 tonnes, the 5th largest non-European supplier. If we consider intra-European flows, the Netherlands exports more than 37,800 tonnes to the rest of Europe, exceeding imports from Thailand. It should be remembered here that the code for "pineapple syrup" also contains what is known as "pineapple concentrate". This product is mostly used for further processing into juice, which explains the large intra-European re-exports. Only a small part of this category represents syrups marketed as such in private shops.

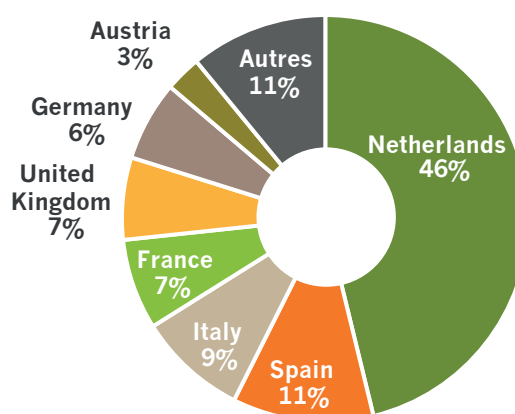


Figure 6: Distribution of European pineapple syrup importing countries (in tonnes) in 2020. (Source: Eurostat for the EU27, and UK Trade Info for the UK)

3.2 Specific requirements of concerned markets

3.2.1 Local and sub-regional market requirements

In the ECOWAS region, there is Regulation [C/REG.21/11/10](#) of 26 November 2010 on the harmonization of the structural framework and operational rules on plant, animal and food safety. It applies to the entire value chain: production, processing and distribution of plants, animals and marketed food. It is a general regulation for the ECOWAS region of West Africa.

With regard to **dried fruits**, the United Nations Industrial Development Organization (UNIDO) and IGNM are negotiating the signing of a memorandum of understanding for the development and/or adoption of standards on this type of fruit.

According to the Ministries of Commerce and Industry-SME, the production of fruit juices and nectars in Guinea must comply with the standard [NG 02 - 01 - 012/ 2013: Codexstan247 - 2005- General Standard for Fruit Juices and Nectars](#), which sets out the essential provisions for public health, food safety and consumer protection. This standard determines the specific characteristics of each individual product. It is aimed at producers, processors, exporters and consumers in the local market. It is an approved standard in the Republic of Guinea. Thus, the actors of the concerned sectors are obliged to apply it. However, like many other standards, it is still little known by companies and consumers. Information and awareness sessions are offered by the Institut Guinéen de Normalisation et de Métrologie (IGNM).

Box 1: Scope of NG 02 - 01 - 012/ 2013: Codex stan 247 - 2005

This standard replaces the various standards for fruit juices and derived products, as indicated below:

Fruit juices preserved exclusively by physical processes: orange juice (CODEX STAN 45-1981), pomelo juice (CODEX STAN 46-1981), lemon juice (CODEX STAN 47-1981), apple juice (CODEX STAN 48-1981), tomato juice (CODEX STAN 49-1981), grape juice (CODEX STAN 82-1981), pineapple juice (CODEX STAN 85-1981), blackcurrant juice (CODEX STAN 120-1981) and General Standard for Fruit Juices not Covered by Individual Standards (CODEX STAN 164-1989).

Fruit juice concentrates preserved exclusively by physical processes: apple juice concentrate (CODEX STAN 63-1981), orange juice concentrate (CODEX STAN 64-1981), grape juice concentrate (CODEX STAN 83-1981), sweetened grape juice concentrate of the Labrusca type (CODEX STAN 84-1981), blackcurrant juice concentrate (CODEX STAN 121-1981) and pineapple juice concentrate (CODEX STAN 138-1983).

Concentrated fruit juices with added preservatives for industrial use: pineapple juice concentrate (CODEX STAN 139-1983).

Guidelines: Guidelines for Mixed Fruit Juices (CAC/GL 11-1991) and Guidelines for Mixed Fruit Nectars (CAC/GL 12-1991).

3.2.2 European market requirements

In Europe, all imported processed fruit and vegetables must meet the requirements of the General Food Law ([Regulation\(EC\) 178/2002](#)), concerning food safety and establishing the European Food Safety Authority (EFSA).

The main requirements of the European market for **dried fruit** in terms of regulations concern :

- Pesticide residues: the European Commission sets a regularly updated list of active ingredients that must respect a Maximum Residue Limit (MRL). The evaluation of MRLs is done by laboratory analysis of samples and may concern several hundred molecules⁷;
- Microbiological contamination: particular attention is paid to E. coli and salmonella contamination which present major public health risks;
- Food additives: the European Commission regulates the addition of foreign substances to food products⁸, such as colourings, preservatives or flavourings. In the case of dried fruit, the main additives concerned are preservatives (sulphur) and E110, a yellow-orange colouring agent.

Some importers have additional requirements, such as compliance with [UNECE DDP-28 standards](#) for dried pineapple⁹. Other contaminants may also be subject to controls and interceptions, such as heavy metals, physical contaminants, mycotoxins, etc. The COLEACP Research & Innovation Department is currently revising a document containing the mango “[technical itinerary](#)”, with information on diseases and SPS problems in mango, some of which can be adapted to dried pineapple. The department has also produced the sugar loaf pineapple “[technical itinerary](#)”, as well as other relevant documents in the e-library (<https://eservices.coleacp.org/fr/e-bibliotheque>).

Fruit juices are subject to the European Directive on fruit juices: [Council Directive 2001/112/EC](#). This directive gives the characteristics of fruit juices, juice from concentrate and nectars, their names, compositions, etc. It is a directive and not a law, which means that it must be transposed into the laws of each specific country in order to export fruit juice to that country. The Directive is complemented by the two directives [2009/106/EC](#) and [2012/12/EU](#). In addition to the EU fruit juice directive, these products are subject to various EU laws regarding manufacturing and labelling, such as EU regulation [1169/2011](#)¹⁰.

3.3 Marketing mix

3.3.1 Packaging

On the local market, **dried** pineapple is available in supermarkets, food shops, wholesalers and retailers. Pineapple **juice** is also available in supermarkets and food shops, but also in ordinary shops in urban centres and in restaurants and hotels.

The products are mainly offered in the following types of **packaging**:

- Dried pineapples: in zip bags of 80 gr for Tropicaux and 200 gr for KDF and EKF, as well as in boxes of 2.5 kg for Tropicaux.
- Pineapple juice: mostly in cans, glass or plastic bottles, or in 25 cl, 33 cl and 1 litre Tetrapacks;
- Pineapple syrup: in glass bottles, especially of 1 l and 70 cl.

⁷ [European Commission website on MRLs](#)

⁸ [Food Commission Food Additive Regulation Act](#)

⁹ UNECE Standard DDP-28 for Dired Pineapples https://unece.org/fileadmin/DAM/trade/agr/standard/dry/Standards/DDP28_DriedPineapples_2014_e.pdf

¹⁰ AIJN. <https://aijn.eu/en/publications/key-eu-legislation/introduction>

For example, the company Tropicaux produces under licence and markets the Reign brand in its range of **dried** pineapple and mango on the local and American markets. The packaging is similar on the local and European markets.



Figure 7: Dried pineapples marketed by Tropicaux on the local and American markets, and by EFK

The **juices** are sold under different names or brands on the local market. We can mention brands such as: Zein, Viva, U-Fresh, Wofa, Solo, Salam, Messi, Planet, etc. Here are some examples of juice and syrup packaging.



1. Zein

2. Viva

3. EFK

Figure 8: Pineapple juice sold on the local market



1.

2.

1.

2.

Figure 9: Examples of pineapple juices sold on the European market

(Source : 1. <https://www.greenweez.com/vitamont-pur-jus-d-ananas-bio-75cl-p19758> ; 2. <https://www.carrefour.fr/p/jus-d-ananas-carrefour-classic-3560070117345>)

Figure 10: Examples of pineapple syrup sold on the European market (Source : 1. https://www.amazon.fr/Teisseire-Sirop-dananas-sp%C3%A9cial-barman/dp/B06Y3XJDK8/ref=dp_prsubs_1?pd_rd_dp=B06Y3XJDK8&psc=1 ; 2. <https://www.monin.com/fr/sirop-ananas-70-cl.html>)

(Source : 1. https://www.amazon.fr/Teisseire-Sirop-dananas-sp%C3%A9cial-barman/dp/B06Y3XJDK8/ref=dp_prsubs_1?pd_rd_dp=B06Y3XJDK8&psc=1 ; 2. <https://www.monin.com/fr/sirop-ananas-70-cl.html>)

3.3.2 Prices

The **prices** charged for processed products and local **dried pineapples** vary according to the volume of the packaging methods. In terms of **packaging**, the products are sold per unit and per box.

Table 1: Prices of different products in the studied markets

Company	Product	Price in local currency (per unit)	Price in US\$ ¹¹ (per unit)	Price in US\$ (per kilo or per litre)
Dried pineapple				
Local and regional market				
Tropicaux	2,5kg box	300,000 GNF	30,47	12,188
Tropicaux	Bag of 80 gr	20,000 GNF	2,3	28,75
EFK	Bag of 100gr	30,000 GNF	3,07	30,7
European market				
Dorimed	1 kg bag	22,9 €	27,19	27,19
Mund Feliz	Bag of 200 gr	6 €	7,12	35,6
Pineapple juice				
Local and regional market				
EFK	Bottle of 33 cl	10,000 GNF	1,02	3,09
European market				
Carrefour	1l Tetrapack	1,09 €	1,29	1,29
Vitamont	75 cl glass bottle	4,88 €	5,79	7,72
Pineapple syrup				
Local and regional market				
EFK	1l bottle	50,000 GNF	5,12	5,12
European market				
Monin	70 cl glass bottle	7,79 €	9,24	13,2
Teisseire	70 cl glass bottle	8,49 €	10,08	14,4

¹¹ The conversion used is as follows: 1US\$ = 9 760 GNF

IV. SECTOR ANALYSIS, CHALLENGES AND OPPORTUNITIES

4.1 Organization of the sector

Tropical fruit processing in general and pineapple processing in particular is an activity in which various companies, associations and organizations are operating in Guinea today, differing in terms of technical and financial capacities, operators' motivations and product destination markets.

Through new forms of fruit valorization (processing and drying), the following objectives are mainly targeted:

- Responding to a request motivated by the possibilities of conservation, the practical value of the product and its new characteristics (taste, texture, presentation, etc.);
- To help solve the problem of outlets for agricultural production, especially for the overproduction observed regularly during the periods and seasons of full production;
- To work in the fight against poverty with the greater involvement of women who have made fruit and vegetable processing one of their main income-generating activities.

The Fédération des Planteurs de Fruits et Légumes de la Basse Guinée (FEPAF-BG) is the umbrella organization of the pineapple production sector. It brings together the main pineapple production organizations and some individual producers. The mission of FEPAF-BG is to coordinate, direct and support the professional activities of growers and other actors, focused on the revival and increase of fruit production to improve the supply of quality products to the markets.

This federation, which has received substantial support from various projects and should continue to do so in the context of new projects underway and in the start-up phase, seems relatively well structured and active, particularly in the grouping of production for group sales to Senegal.

Producer organizations (COPEFL, UGPAM), members of FEPAF, are very active in supplying these sub-regional markets. COPEFL has a refrigerated truck for transporting pineapple and a relay store in Dakar. This store is the main place where fresh pineapple from Guinea is traded with Senegalese traders. In addition to these organizations, some traders also export pineapple from Guinea to the sub-region.

For a better synergy of action around the pineapple sector, FEPAF-BG plans with the support of partners, to develop the pineapple value chain through actions in the valorization of pineapple production, especially those unsaleable in the fresh state (dried fruits, puree, juice, jam, preserves) for the local, regional (West Africa) and European markets

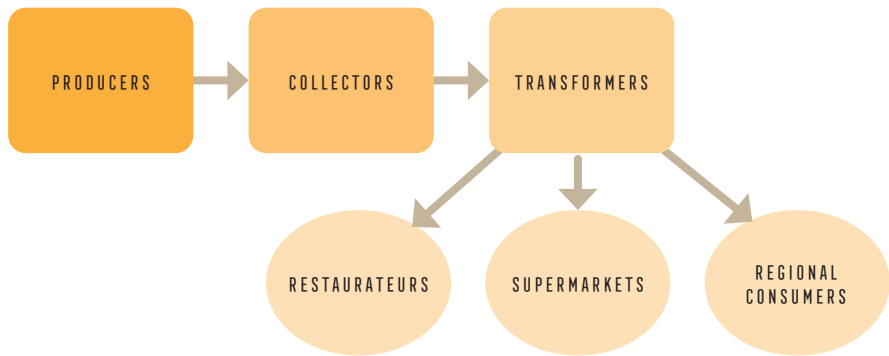
Thus, the establishment of the organization of pineapple processors producing a range of products in the Association of Pineapple Processors of Guinea (ATAG) and of exporters in the Association of Pineapple Exporters of Guinea (AEAG) is one of the priorities.

4.2 Categories of actors and their relationships

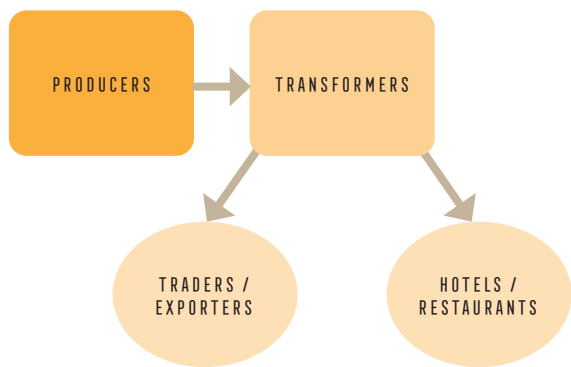
The pineapple juice value chain for the local market includes a large number of artisanal, semi-artisanal and semi-industrial processing units, as well as producers, collectors, wholesalers, processors, restaurants, supermarkets and finally regional consumers of pineapple juice. The different types of relationships include contractual relationships, linking producers to processing units in order to ensure the supply of raw material, and more open relationships guided by the search for the availability of raw material at any location. Another category of actors in this chain includes the structures responsible for quality control and approval.

The diagrams below summarize the organization of pineapple value chains by type of processing as follows

Artisanal unit

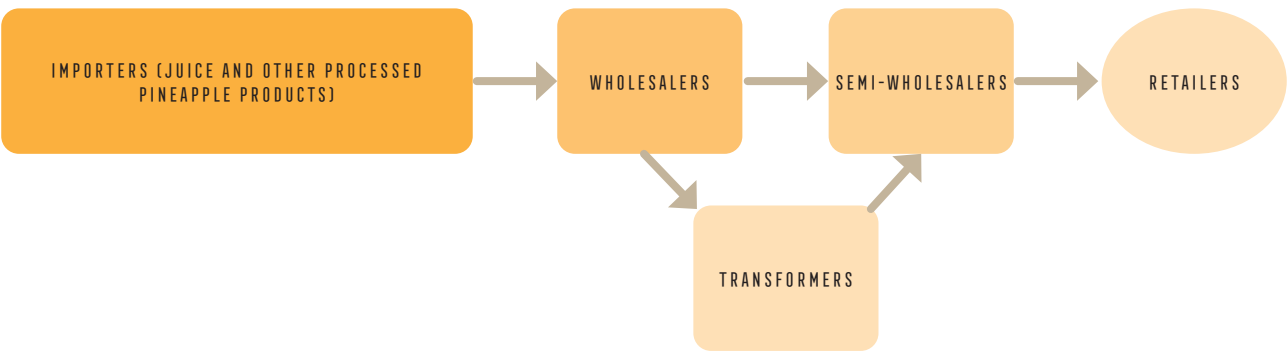


Semi-industrial and industrial unit



The organization of the imported processed pineapple product chain in Guinea mainly follows the following pattern:

Importers (juice and other processed pineapple products)



4.3 Weaknesses and challenges

At the processing level :

- lack of production reliability causing a lack of raw materials in the processing units;
- insufficient or no appropriate equipment;
- low processing capacity of the units ;
- high costs of processing pineapple into juice (especially energy costs);
- problem related to the import of packaging (bottles, cartons, etc.);
- weak market for processed products ;

At the marketing level :

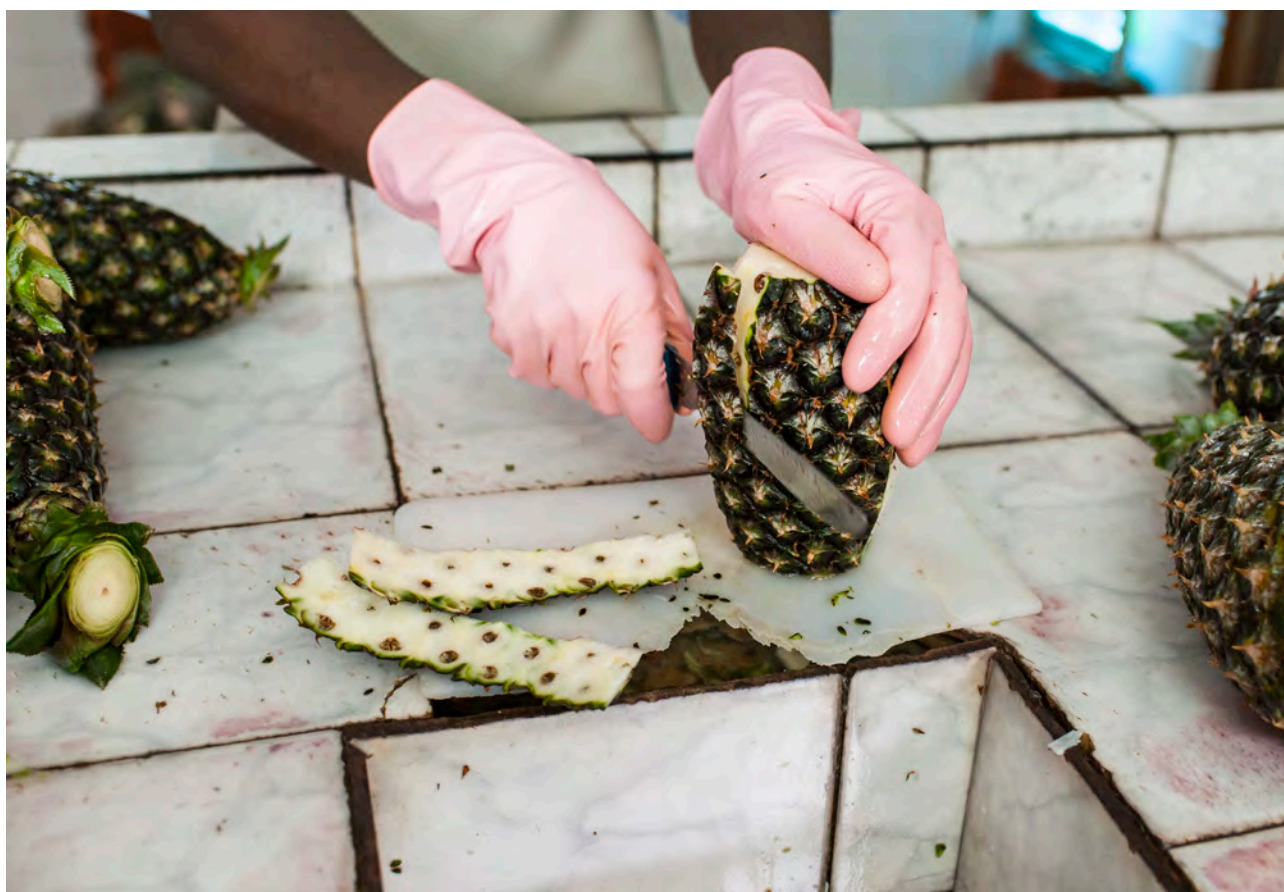
- limited transport supply and high cost ;
- actors insufficiently organized to promote marketing to the external market;
- police and customs problems.

4.4 Opportunities

4.4.1 On the local and regional market

As regards **pineapple juice**, consumers are not very demanding about the origin of the product. A product differentiation highlighting the “Guinea origin” of the juices could be a way of differentiation and commercial opportunities. However, this would require a lot of work in fresh fruit production, communication and marketing, which limits the interest of this development. It should be noted here that the new Emirati company that has taken over Salguidia is considering getting involved in the production of fruit, in order to better control supplies and product quality.

Dried pineapple has proven to be a successful alternative in other countries in the sub-region.



An example to follow could be Burkina Faso and Mali, with several companies producing and marketing dried mango. However, it is again a little known product in local and regional markets. This niche market is **slowly developing** in the snacking or energy products sector. Despite the problems associated with the production of dried fruit in Guinea and the constraints on processing, there are advantages for export markets. The existence of a significant fruit potential and the enthusiasm of stakeholders, particularly women, who have received good training thanks to the support of programmes and projects financed by the government and its partners, are noteworthy. Training in improved drying and storage/preservation techniques and initiation in the manufacture of dryers are therefore major assets for the sustainable development of this sub-sector.

Indeed, pineapple production constitutes a real opportunity and the value chain offers important possibilities of direct and indirect job creation with the production-sale of fresh products, light processing (artisanal and semi-industrial) and industrial processing through the provision of by-products and their sale on the national, regional and international markets.

4.4.2 On the European market

The UK and Germany present the best opportunities for **dried** fruit. The dried fruit market in Eastern and Central Europe is growing faster than in Western Europe.¹²

According to the Centre for Promotion of Imports from Developing Countries (CBI), the growth of the fruit **juice** market is **relatively low** among processed fruits and vegetables, due to consumers' desire to eat less sugar. Demand for pineapple juice and mango juice is growing, with pineapple juice being the most imported tropical fruit juice in Europe.¹³



However, as Guinea is **far from being a major supplier** in terms of volume to the European market, it is in the country's interest to differentiate itself by promoting the "Guinea origin", especially as it has a "Baronne de Guinée" pineapple variety.

In **organic** agriculture, pineapple juice is in the top 5 of juice imports into Europe from the rest of the world, and is the first juice imported from ACP countries. Benin and Togo are already marketing it and could thus be a model for Guinea, while organic is a fast-growing market segment in Europe with a promising future.

¹² CBI - Exporting edible nuts and dried fruits to Europe (2018)

¹³ CBI - What is the demand for processed fruit and vegetables on the European Market? (2021)

V. CONCLUSION AND RECOMMENDATIONS TO THE VARIOUS STAKEHOLDERS

The demand for dried fruits, especially dried pineapple, on the local, sub-regional and international markets is generally increasing due to population growth, urbanization and the improvement of living conditions. It concerns essentially the semi-industrial and industrial production of dried pineapple as it is the case of the products of the Tropicaux company which are very much in demand on the local market and that of the United States. However, this demand is difficult to meet due to structural and raw material supply problems linked to high agricultural prices, poor logistics, losses related to fruit quality and diseases (fruit flies for mango and other pests), as well as the lack of compliant plantations.

The valorization of pineapple from Guinea into fresh pineapple juice and syrups for local and sub-regional markets is still very limited due to the low manufacturing capacities of quality and competitive products, but especially to the presence on these markets (Guinean and West African markets) of imported juices or drinks or manufactured from concentrate by local industries. Juices and syrups can be interesting for these markets but require more investments, in terms of production and promotion, like the actions planned and in progress, such as the relaunch of the activities of the former Salguidia, taken over by Sage S.A.

As regards Europe, the volume markets for dried pineapple and pineapple juice appear difficult to access for the Guinean product given the competitors already well established and the evolution of demand. However, the Central and Eastern European market remains to be monitored as it has a development reserve in volumes. Organic is an opportunity, in particular through the differentiation of the origin linked to the Baronne de Guinée variety.¹⁴ The pineapple syrup market could also be an opportunity if the Guinea syrup meets the expected quality standards.



Recommendations to companies in the Agro Business sector :

- Support the dynamics of grouping processing units with a view to setting up individual or collective brands, juices and other processed pineapple-based products of Guinean origin with the leverage of grouped purchases of packaging, contractual supplies, traceability and the capacity to satisfy the major demands in the sub-region;

¹⁴ Unijus - The health crisis has a heavy impact on the fruit juice market (2020)

- Support operators exporting juice and other processed pineapple products to develop initiatives aimed at pooling the efforts of processors for grouped purchases of packaging;
- Support initiatives to formalize contracts and agreements between producers and processors (cultivation or supply contracts) in order to guarantee the supply of raw materials at reduced cost;
- Inform processors of juice and other processed pineapple products about the installation standards and their importance;
- Systematize internal quality control by providing processors with information via an internal control kit;
- To improve and structure the export sector through a labeling¹⁵ process, which is a guarantee of a reference in processing and marketing of juice and other processed pineapple products on the markets of the sub-region, the United States and Europe.

Recommendations to exporters :

- Recognition of and compliance with processing and export standards for processed pineapple products by each processing unit manager within his/her unit;
- Develop institutional marketing actions to attract the interest of financial structures in order to accompany them;
- A good organisation of exporters would also favour the grouped ordering of packaging and labels, which would be less costly and would undoubtedly reduce the cost of production of the juice and therefore the selling price.

Recommendations to the professional organizations of the pineapple sector :

- Advocacy to allow the cost of energy to fall.
- Capacity building on quality approaches

Recommendations to the competent authorities :

- Establish incentives to encourage strong involvement of the technical directorates of customs to assist exporters in the transit of their processed pineapple products;
- Promote collaboration between the different state actors involved in the export of agricultural products in order to increase accountability and visibility on standards issues;
- Facilitate the establishment of a national packaging production unit;
- Raise awareness among Guinean operators on the ECOWAS Trade Liberalization Scheme (TLS) and ECOWAS approvals.
- Inform companies on regulations and technologies (requirements in terms of standards and quality) and markets (volume of supply, cost structure, potential demand, export offers, prices, etc.) to enable them to better position themselves on the various sub-regional, notably the recipient countries of our fresh pineapples (Senegal, Gambia, Mali and Sierra Leone), regional and international markets (Maghreb, Europe and America).

¹⁵ Labelling is understood here to mean: the fact of attributing a distinctive mark to a product which allows it to be recognised as having a certain quality, a conformity in relation to standards, with the aim of distinguishing it from other products.

APPENDIX 1: MAIN PINEAPPLE PROCESSING COMPANIES IN GUINEA

Processing unit	Website	Products	Markets
Manufacturers of pineapple juice from fresh fruit			
Tropicaux S. A	Friguiagbé (Kindia)	Dried pineapple	Local and American
Sage S.A	Maférinyah (Forécariah)	Pineapple juice,	Local and international
Guinea Fruits Corporation (Gfc)	Downtown Kankan	Fruit juice (mango, pineapple, orange)	Local, sub-regional and international
Kanya Donse Fanyi (Kdf)	City centre (Kindia)	Dried pineapple	Local, Maghrebien and international
Entreprise Fatou & Kadija (EFK), SARL	Friguiagbé (Kindia)	Dried pineapple, Fruit juice (mango, pineapple, orange) and syrups	Local, Maghrebien and international
Manufacturers of juice or beverages from concentrate and artificial flavourings			
General Drink Company	Gomboya (Coyah)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
American Beverage	Kagbélen (Dubréka)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
Sonoco	Sonfonia (Conakry)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
U-Fresh	Maférinya (Forécariah)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
Braguinee	Massaya (Dubréka)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
Wofa	Maférinya (Forécariah)	Fruit juice (mango, pineapple, orange)	Local, sub-regional
Zein-Industry	Sanoyah (Conakry)	Fruit juice (mango, pineapple, orange)	Local, sub-regional

Source: Study report (Mamadou CONDE, June 2020)

APPENDIX 2: DATA SOURCE [BIBLIOGRAPHY]

The data mentioned in this market research report comes from the following sources:

1. World Bank

- Analysis of the economic and financial profitability of promising sectors, Nicolas Gergely, Expert, , March 2019

2. International Trade Centre (ITC),

- Market study and identification of opportunities for fresh pineapple from Guinea in the Malian market, November 2020 ;
- Market study and opportunity identification for fresh pineapple from Guinea in the Gambian market, December 2020 ;

3. Europe-Africa-Caribbean-Pacific Liaison Committee (COLEACP),

- Pineapple import and export statistics, 2008 -2018, 2021 ;
- Market profile for processed tomatoes in Senegal

4. World Trade Organization (WTO)

- Trade Policy Review, WTO Secretariat Report 2011

5. West Africa Competitiveness Program (WACP),

- Relaunching the pineapple industry (REFILA), 2017;

6. Republic of Guinea, Customs

- Guinea import and export statistics (all products) 2017-2020, , May 2021



COLEACP

PARIS · BRUSSELS · NAIROBI

GROWING PEOPLE

COLEACP

Belgium - Avenue Arnaud Fraiteur 15/23 - B-1050 Brussels
France - Rue de la corderie, 5 - Centra 342 - 94586 Rungis Cedex
Kenya - Laiboni Center, 4th floor, P.O. BOX 100798-00101, Nairobi
network@coleacp.org | www.coleacp.org