European banana market supply balance More and more!

In 1999, the European banana market handled at least 130 000 tonnes more than in the previous year. This strong increase in officially imported volumes (fraud not counted) partly explains the very marked fall in import prices.

The results presented on the basis of import certificates (source: European Commission) show imports of 3 257 371 tonnes of bananas from third countries. On the same basis of calculation (ACP and non-ACP, excluding re-exports), the European statistical office (Eurostat), whose data we publish each year (see below), gives the figure of 3 169 374 tonnes. Whatever the difference between sources, the trend is an upward one. The market has taken at least a further 130 000 tonnes, to which should be added bananas imported illegally—whether this is proved or only suspected ('real/forged' import certificates and overweight boxes).

FRuiTROP

It is true that the reasons for poor market conditions should not be sought only in over-supply. Distributors' bargaining power has considerably increased in recent years. The spreading of import rights resulting from an

increase in the number of operators has disturbed the market. Finally, the market supply rate, with quarterly opening of part of the quota, is sometimes out of phase with real consumption.

Nevertheless, increased supplies have weighed on prices and highlighted the lack of market steering. The supply balance calculated on almost a real time basis would make it possible to adjust the volumes imported to the share of European consumption not covered by community production. This will no doubt remind many French operators of the pre-1993 period when the *Comité Interprofessionnel Bananier* (CIB) organised the French market for over sixty years for the well-being of all the sub-sector stakeholders •

> Denis Loeillet, Cirad-flhor denis.loeillet@cirad.fr

Year [–]	Banana type or origin						
	Community	ACP quantity		Others (\$)	Sub-total	Exports	Supplies
		traditional	non trad.	Others (\$)			
1988	719 270	513 043	1 018	1 644 100	2 877 431	17 265	2 860 166
1989	698 925	542 628	1 792	1 716 500	2 959 845	13 415	2 946 430
1990	710 635	617 353	4 523	2 024 243	3 356 754	36 219	3 320 535
1991	695 402	584 516	11 898	2 286 014	3 577 830	53 468	3 524 362
1992	711 191	641 005	39 161	2 366 800	3 758 157	39 689	3 718 468
1993	646 242	677 326	70 785	2 219 715	3 614 068	36 138	3 577 930
1994	584 622	629 595	97 338	~ 2 102 375	3 308 068	58 044	3 250 024
1995	658 206	670 479	93 486	2 386 931	3 765 803	43 082	3 722 721
1996	684 605	682 526	116 866	2 466 380	3 916 508	30 598	3 855 910
1997	810 537	614 026	76 567	2 394 976	3 896 106	16 571	3 879 535
1998	786 232	537 349	77 812	2 393 350	3 794 743	26 448	3 768 295
1999	729 303	572 320	103 994	2 520 419	3 926 036	27 359	3 898 677
	(1)	(2 a)	(2 b)	(3)		(4)	
(1)	1988 to 1993 inclusive: Eurostat + European Commission data for Madeira and Greece. From 1994 onwards: supplement						
(1)	1988 to 1993	inclusive: Eurosta	it + European Co	mmission data for	Madeira and Gree	ce. From 1994 of	nwards: supplemer
(1)	aid data.		nan - Gerlanden die Friederschutze der				
(1) (2)	aid data. Eurostat data	divided into (a) tra	aditional quantitie	s from traditional A	CP states, i.e. with	nin the limits of in	dividual quantities
	aid data. Eurostat data 155 000 tonne	divided into (a) tra es for Côte d'Ivo	aditional quantitie ire) and (b) non-	s from traditional A traditional quantitio	CP states, i.e. with es from traditional	nin the limits of in ACP countries (dividual quantities (e.g., for Côte d'lv
	aid data. Eurostat data 155 000 tonn exported quar	divided into (a) tra es for Côte d'Ivo ntities over and	aditional quantitie ire) and (b) non-	s from traditional A	CP states, i.e. with es from traditional	nin the limits of in ACP countries (dividual quantities (e.g., for Côte d'lv
(2)	aid data. Eurostat data 155 000 tonn exported quar Republic, Gha	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.).	aditional quantitie ire) and (b) non- above the 155 (s from traditional A traditional quantitio 000 tonnes allowe	CP states, i.e. with es from traditional ed) and from not	nin the limits of in ACP countries (dividual quantities (e.g., for Côte d'lv
(2)	aid data. Eurostat data 155 000 tonn exported quar Republic, Gha Eurostat data:	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r	aditional quantitie ire) and (b) non- above the 155 (ion-community ar	s from traditional A traditional quantitio 000 tonnes allowe Id non-ACP countri	CP states, i.e. with es from traditional ed) and from not es.	nin the limits of in ACP countries (n-traditional ACP	dividual quantities (e.g., for Côte d'lv countries (Domir
(2)	aid data. Eurostat data 155 000 tonno exported quar Republic, Gha Eurostat data: Duty-paid ban	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r anas (released fo	aditional quantitie ire) and (b) non- above the 155 (ion-community ar or free circulation	s from traditional A traditional quantitio 000 tonnes allowe	CP states, i.e. with es from traditional ed) and from not es.	nin the limits of in ACP countries (n-traditional ACP	dividual quantities (e.g., for Côte d'lv countries (Domir
(2) (3) (4)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that	divided into (a) transformed to the constraint of the constraint o	aditional quantitie ire) and (b) non- above the 155 (non-community ar or free circulation pananas.	s from traditional A traditional quantitio 000 tonnes allowe nd non-ACP countri) in one of the EU	CP states, i.e. with es from traditional ed) and from non es. member countries	nin the limits of in ACP countries (n-traditional ACP and then export	dividual quantities (e.g., for Côte d'lv countries (Domir ed outside EU-15.
(2)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that Before 1994: d	divided into (a) transformed to the contract of the contract o	aditional quantitie ire) and (b) non- above the 155 (non-community ar or free circulation pananas. + plantains / From	s from traditional A traditional quantitio 000 tonnes allowe of non-ACP countri of the EU of 1994 onwards: de	CP states, i.e. with es from traditional ed) and from non es. member countries essert bananas. Be	nin the limits of in ACP countries (n-traditional ACP and then export fore 1995: EU-12	dividual quantities (e.g., for Côte d'Iv countries (Domir ed outside EU-15. 2 / From 1995 onwa
(2) (3) (4)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that Before 1994: o EU-15. The st	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r anas (released fo these are dollar h dessert bananas- udy concerns ext	aditional quantitie ire) and (b) non- above the 155 (non-community ar or free circulation bananas. + plantains / From ra-community imp	s from traditional A traditional quantition 000 tonnes allowe of non-ACP countri of none of the EU of 1994 onwards: de port data for ACP a	CP states, i.e. with es from traditional ed) and from nor ies. member countries essert bananas. Be and dollar bananas	nin the limits of in ACP countries (n-traditional ACP and then export fore 1995: EU-12 and re-export. Ti	dividual quantities (e.g., for Côte d'Iv countries (Domir ed outside EU-15. ? / From 1995 onwa he rules of operatio
(2) (3) (4)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that Before 1994: o EU-15. The st the common n	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r anas (released for these are dollar b dessert bananas- udy concerns ext narket organisatio	aditional quantitie ire) and (b) non- above the 155 (non-community ar or free circulation bananas. + plantains / From ra-community imp	s from traditional A traditional quantitio 000 tonnes allowe of non-ACP countri of the EU of 1994 onwards: de	CP states, i.e. with es from traditional ed) and from nor ies. member countries essert bananas. Be and dollar bananas	nin the limits of in ACP countries (n-traditional ACP and then export fore 1995: EU-12 and re-export. Ti	dividual quantities (e.g., for Côte d'Iv countries (Domir ed outside EU-15. ? / From 1995 onwa he rules of operatio
(2) (3) (4)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that Before 1994: c EU-15. The st the common n comparable re	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r anas (released fo these are dollar b dessert bananas udy concerns ext narket organisation sults.	aditional quantitie ire) and (b) non- above the 155 (pon-community ar or free circulation bananas. ← plantains / From ra-community imp n of banana (199	s from traditional A traditional quantition 000 tonnes allowe of non-ACP countri of none of the EU 1994 onwards: de port data for ACP a 3 version) have be	CP states, i.e. with es from traditional ed) and from nor es. member countries essert bananas. Be and dollar bananas een applied to the	hin the limits of in ACP countries (n-traditional ACP and then export fore 1995: EU-12 and re-export. Th data from 1988 of	dividual quantities (e.g., for Côte d'Iv countries (Domir red outside EU-15. 2 / From 1995 onwa he rules of operation nwards in order to
(2) (3) (4)	aid data. Eurostat data 155 000 tonne exported quar Republic, Gha Eurostat data: Duty-paid ban supposed that Before 1994: o EU-15. The st the common n comparable re Publication of	divided into (a) tra es for Côte d'Ivo ntities over and na, etc.). all imports from r anas (released fo these are dollar b dessert bananas - udy concerns ext narket organisatio esults. the results in the	aditional quantitie ire) and (b) non- above the 155 (pon-community ar or free circulation oananas. ← plantains / From ra-community imp n of banana (199 supplement to Inf	s from traditional A traditional quantition 000 tonnes allowe of non-ACP countri of none of the EU of 1994 onwards: de port data for ACP a	CP states, i.e. with es from traditional ed) and from nor ies. member countries essert bananas. Be and dollar bananas een applied to the ublished by CIRAE	hin the limits of in ACP countries (n-traditional ACP and then export fore 1995: EU-12 and re-export. Th data from 1988 of	dividual quantities (e.g., for Côte d'Iv countries (Domir red outside EU-15. 2 / From 1995 onwa he rules of operation nwards in order to