

European banana market supplies 1988-2001

2001: an exemplary year

Examination of the supply of the European banana market shows a limited but overall decrease in supplies. The decrease in quantities available is to be related to the good market prices in 2001. Even if other factors affected banana prices, it can legitimately be considered that the quantity factor is preponderant.

The proverb of the straw that broke the camel's back applies perfectly to the functioning of the European banana market. In 2000, the supply balance (*Fruitrop* 84, page 14) showed that the symbolic 4-million tonne mark had been exceeded and we remember the catastrophic year for the markets. The situation in 2001 was precisely the opposite: supplies were down by a little more than 2% (-93 000 tonnes) and the market was set fair.

All types of origin participated in this decrease in market releases. ACP supplies fell by 3.5% after a particularly plentiful 2000. This group displayed once again the gap between the African ACP countries Cameroon and Côte d'Ivoire, whose releases increased by 5 and 9% respectively,

and the ex traditional ACP countries in the Caribbean, except for Jamaica, that reduced their releases. The Dominican Republic escaped the doldrums, scoring a very strong increase in shipments (+44 %).

Community origins also reduced their shipments (-2%), with marked differences between regions. The Canaries increased their shipments by nearly 6% whereas Martinique (-14%) and Madeira (-8%) reduced theirs.

Dollar zone exports to the EU fell by 2.4% to less than 2.5 million tonnes. The five leading origins strengthened their hold on the market. Ecuador, Colombia, Costa Rica, Panama and Honduras hold 99% of the dollar banana market, which increased by

2%. Ecuador (+4%) and Colombia (+4%) displayed increases, unlike Costa Rica (-4%) and Panama (-11%). Brazil is an origin to be watched. Although it is clearly a minority source of supply (17 000 tonnes), this large fruit-producing country demonstrated its ambitions by increasing its banana shipments to the EU by 31%. Venezuela displayed the opposite trend with -34 %.

Reduced supplies, a marked decrease in fraud, a better market context (weak competition from the other fruits) and more regular supplying of the market form the known recipe for success. It just needs to be applied ■

Denis Lœillet
denis.loeillet@cirad.fr

EUROPEAN UNION – EVALUATION OF BANANA SUPPLIES (TONNES)

Year	Banana type or origin				Sub-total	Exports	Supplies
	Community	ACP	Dom. Rep. & others ACP	Others (\$)			
		12 ex-traditional ACP					
1988	719 270	513 043	344	1 644 100	2 877 431	17 265	2 860 166
1989	698 925	542 628	855	1 716 500	2 959 541	13 415	2 946 126
1990	710 635	617 578	3 829	2 024 248	3 356 758	36 219	3 320 539
1991	695 402	584 516	9 681	2 286 019	3 577 837	53 468	3 524 369
1992	711 191	641 005	38 492	2 365 883	3 757 265	39 689	3 717 576
1993	646 242	683 583	61 662	2 219 721	3 614 083	36 138	3 577 945
1994	584 622	639 742	86 007	2 102 303	3 413 852	58 044	3 355 808
1995	658 206	687 162	75 046	2 405 180	3 827 352	43 082	3 784 270
1996	684 605	733 467	61 184	2 471 263	3 955 942	30 598	3 925 344
1997	810 537	640 532	46 520	2 464 412	3 968 003	16 571	3 951 432
1998	786 232	554 025	55 730	2 426 419	3 828 247	26 448	3 801 799
1999	729 303	631 548	42 125	2 522 455	3 927 751	27 359	3 900 392
2000	782 176	693 952	59 734	2 528 170	4 067 154	35 327	4 031 827
2001	767 268	640 745	86 044	2 468 462	3 966 275	27 145	3 939 130

- (1) 1988 to 1993 inclusive: Eurostat + European Commission data for Madeira and Greece. From 1994 onwards: supplementary aid data.
 (2) Cameroon, Côte d'Ivoire, Somalia, Cape Verde, Madagascar, Belize, St Lucia, Jamaica, Dominique, St Vincent, Grenade, Surinam.
 (3) Eurostat data: all imports from non-community and non-ACP countries.
 (4) Duty-paid bananas (released for free circulation) in one of the EU member countries and then exported outside EU-15.
- General note: Before 1994: dessert bananas + plantains / From 1994 onwards: dessert bananas. Before 1995: EU-12 / From 1995 onwards: EU-15. The study concerns extra-community import data for ACP and dollar bananas and re-export. The rules of operation of the common market organisation of banana (1993 version) have been applied to the data from 1988 onwards in order to give comparable results. Publication of the results in the supplement to Info Banane No.61 published by CIRAD-FLHOR for ODEADOM.
- Source: Eurostat (CD ROM sup 2-1997, 6-2001 and sup 2-2001), European commission.
- Processing: CIRAD-FLHOR Market News Service.