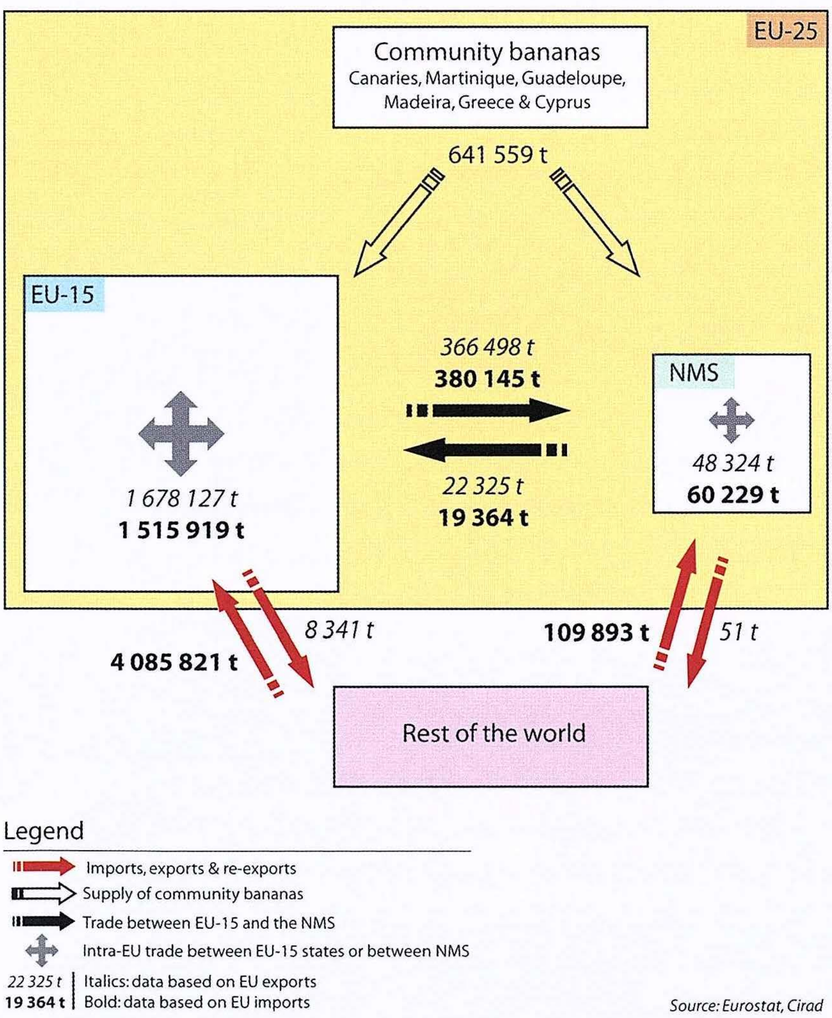
Banana in Europe

To all malcontents...

The EU market supply balance for 2006 will give food for thought to all the malcontents who considered that banana consumption had reached a peak and that nothing could make things move. To judge by the statistics provided by Eurostat, EU-25 consumed 460 000 tonnes more bananas than in 2005. In 2006, more than 4.8 million tonnes of the fruit was swallowed by the 450 million strong population of the EU in comparison with a little less than 4.4 million in 2005. This growth (+ 11%) was both extraordinary and unexpected and took per capita consumption to 10.6 kg per year. This is exactly 1 kg more than in 2005. There has never been such a strong increase in the EU for a constant number of members. It is all the more astonishing as the opposite trend is observed on other fresh fruit markets where consumption is stabilising at best.

Two features may account for this very strong increase. The first is a catching-up effect. Indeed, the European supply policy set up on the

Banana - EU-25 supply - 2006



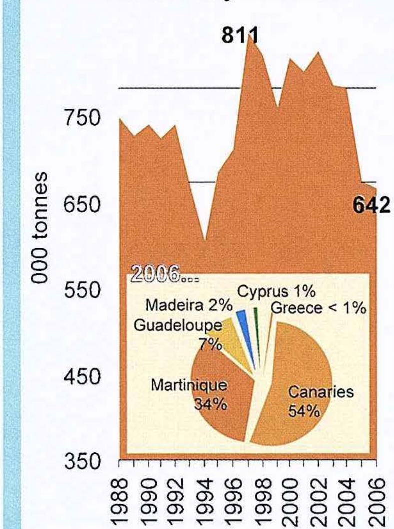
Source: Eurostat, Cirad

EU production

The expected recovery of community production did not happen in 2006. European production decreased for the fourth year running and was hardly more than 640 000 tonnes. This is far from the absolute record of 810 537 tonnes in 1997. Production is stabilising or possibly improving in the Canary islands (the leading European producer), Madeira, Greece and Cyprus. In contrast, supplies from Martinique and especially Guadeloupe are decreasing. The latter has reached a new historical floor at 48 000 tonnes.

The market share of European production has fallen to 13.3%, a decrease of 1.5% in comparison with 2005. APEB, grouping European banana producers, has just issued a remainder of its objectives for the coming years: 'limiting our production to today's level, developing a strong quality and environmental policy and ensuring for our European consumers the greatest transparency ad the greatest reliability in food hygiene and the traceability of our production' (***Trait d'Union*** No 171). This strategy is facilitated by the reform of the support system for European producers that was negotiated in 2006 and came into force of 1 January 2007.

Community bananas



Source: European Commission

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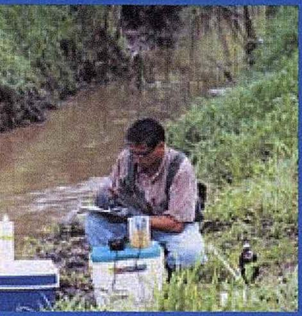

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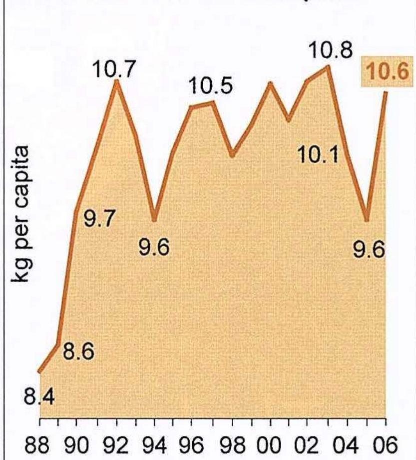
joining of the new member countries (NMCs) in 2004 had restricted and reduced the volumes reaching the market via quotas that were all subsequently seen to be a bit small with regard to consumption by the NMCs. In fact, a 240 000-tonne decrease in total supplies was observed in 2005. The second reason is the major change in the regulations related to the common market organisation of bananas in 2006. The old quota systems was removed on 1 January 2006 and replaced by a tariff-only system. Imports from non-ACP third countries are no longer regulated by quotas but subject to the payment of customs dues of EUR 176 per tonne. ACP suppliers have to juggle with an undersized duty-free quota (775 000 tonnes) managed by a bi-monthly system of issue of import certificates and the common regime consisting of the tariff of EUR 176 per tonne. This liberalisation of the European market soon led to an increase in shipments from practically all supplier countries. The 'catching-up' and 'liberalisation' effects were cumulated with an increase in the quantities available world-wide following the return to full production in Costa Rica, certain ACP countries in the West Indies (Jamaica and St Lucia) and in Côte d'Ivoire. The Dominican Republic, Surinam, Ghana, Brazil and Peru also made substantial contributions to the unprecedented increase in imports.

Promise kept

As we have already reported (***FruiTrop*** 143, pages 2 and 3), 2006 made it possible to verify the respect of the dogma laid down by the WTO, with the tariff-only regime 'at least

Banana - EU - Consumption



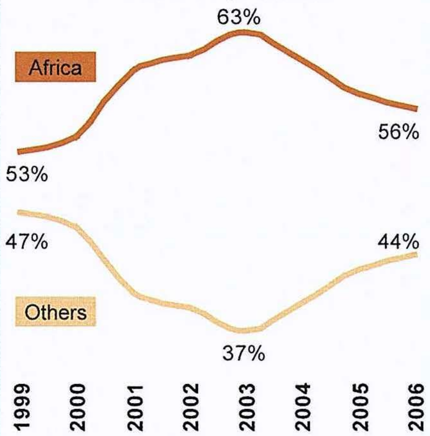
Note: before 1995 EU-12, then EU-15, from 2004 EU-25
Sources: Eurostat, FAO

ACP production

For the first time in its history, the ACP producer group sold more than 900 000 tonnes of banana on the EU market. It improved its market share by 1.2% to 18.7% thanks to an increase of 140 000 tonnes in shipments. ACP producers exceeded their duty-free quota by 131 000 tonnes; this affected their competitiveness by obliging them to pay the full EUR 176 per tonne customs tariff.

West Indian ACP producers confirmed their recovery, enhanced of course by the return of production in Jamaica and St Lucia, but above all thanks to the continued strong development of the Dominican Republic which is confirming its position as world leader on the organic and fair trade banana market and the results of the re-launching of banana exports from Surinam. In the ACP group, the West Indian share

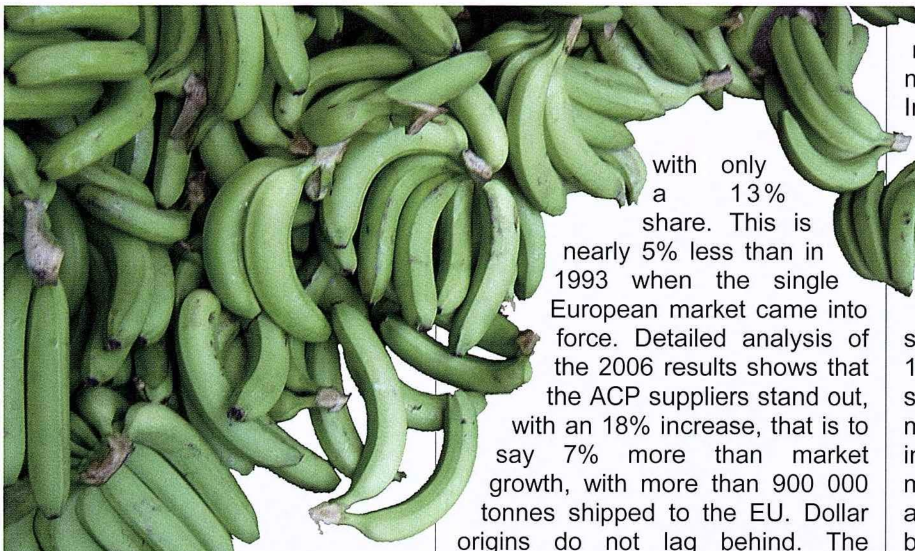
Banana - EU imports from ACP producers



Source: Eurostat

rose to 44% in 2006. But Africa did not do badly either. Cameroon maintained the same level of shipments as in the two preceding years, but this was less than the magnificent performance of 2003. Côte d'Ivoire succeeded in breaking its record, shipping 228 000 tonnes against a background of difficult political conditions. Exports from Ghana, the newcomer, are already running at more than 24 000 tonnes.

All eyes are on the ACP group. For the Latin American producer countries and especially Ecuador it is the perfect expiatory victim that shows how stimulating the European system is for the ACP countries. It remains to be proved that ACP growth is at the expense of dollar suppliers but Ecuador sees this as just a detail…



maintaining total market access for MFN banana suppliers' (MFN: most-favoured nation). With regard to the quantities imported, whether in market share or volume, the new supply regime was more than convincing in its beneficial effects for third countries, including ACP countries. Third countries have never held such a large market share in Europe at 87%! This increase in imports has been entirely at the expense of community production, with only a 13% share. This is nearly 5% less than in 1993 when the single European market came into force. Detailed analysis of the 2006 results shows that the ACP suppliers stand out, with an 18% increase, that is to say 7% more than market growth, with more than 900 000 tonnes shipped to the EU. Dollar origins do not lag behind. The quantities are increasing at the same rate as market growth (+ 11%) to 3.3 million tonnes. The additional 330 000 tonnes shipped to the EU in 2006 also allowed them to improve their market share slightly to 68% (+ 0.3%).

The increase in imports from third countries was marked above all from May onwards. The first four months of the year were marked by hesitation resulting in growth of only just 50 000 t. Subsequently, an extra 50 000 t found takers every month until the end of the year. Only Ecuador shipped less and less to the EU as the months went by. ACP releases were governed by the bi-monthly issuing of import certificates. Indeed, ACP banana operators had to juggle with three systems here too—first come first served to 105 000 tonnes per two-month period, using the certificates gained on the basis of imports made in past years (historical references) and, when the two systems are exhausted, paying EUR 176 per tonne. As the first-come-first-served system is managed on a bi-monthly basis, it is in operators' interest to concentrate their shipments to the EU in the early weeks, as the quantities allocated will soon be exhausted. For example, exports from Côte d'Ivoire or the Dominican Republic are often performed at the beginning of the two-month period.

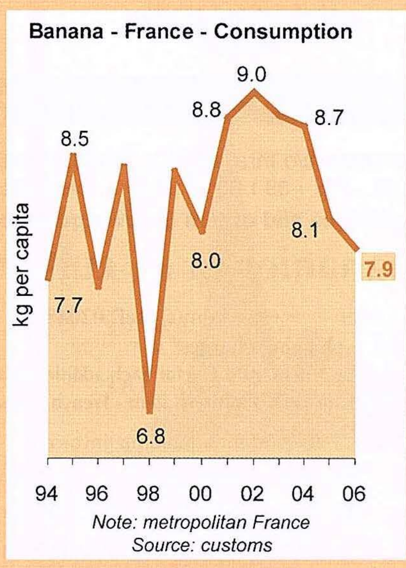
Ever-increasing uncertainty

The impact of the increase in these volumes on the value of the European banana market received extensive coverage in the February 2007 issue of FruiTrop (No 142, pages 6 to 9). Market volatility has increased considerably. The removal of its structure—that some call liberalisation—has had devastating effects. Opportunist and unmethodical market releases of fruits from Guatemala from April onwards are a good example of the destabilisation that is now a constant threat to the European market. It has become an unpredictable market where on the one hand operators may behave irrationally or like sheep and on the other where the large retail chains have considerable weight in negotiations.

The European market was long extremely dependent on reforms of the common market organisation (CMO) of bananas. Operators had to manage the uncertainty in the regulations resulted in repeated complaints to the WTO and incessant multilateral negotiations. They now have to handle commercial uncertainty and this seems more dangerous for individual sales accounts. In the first case, the value-added of the goods was relatively well protected, but the opposite can now be feared. The destruction of value or even the pauperisation of the industry is a threat. The most

French market

French consumption has moved away from the European trend. It remained stable in 2006 at 8 kg per person whereas it had reached some 9 kg in 2002. The market totals about 487 000 tonnes. This is 40 000 tonnes less than in 2004 and practically the same as in 2005. The stability in comparison with 2005 hides major changes in market supply structure. Strong pressure is felt from ACP suppliers who achieved a 44% market share in comparison with 36% in 2005. In contrast with what might be imagined, pressure from dollar bananas (including volumes arriving via an EU member country) has decreased a little. The share returned to 18% after a peak at 24% in 2005. France is confirming its position as a re-shipping hub in Europe. One banana in four, that is to say some 160 000 tonnes, goes on to other member-countries. This is a lot but nonetheless far from the 196 000 tonnes re-shipped in 2004.



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Le bananier et sa culture

Cet ouvrage propose des modes de gestion technique et agronomique pour une culture durable de la banane. Après un rappel des connaissances sur la plante, les contraintes parasitaires et l'évolution économique récente de ce produit, l'auteur présente les concepts de culture raisonnée et de banane biologique. En tenant compte des évolutions récentes tant dans les domaines phytosanitaires et agronomiques que dans ceux de la fertilisation et de l'irrigation, il développe ensuite tous les aspects de la production : les conditions de mise en culture pour réduire les intrants et donc la pollution ; les pratiques optimales pour obtenir une productivité satisfaisante ; les opérations de conditionnement nécessaires pour garantir la qualité des fruits ; les techniques d'aide à la décision pour raisonner les pratiques culturales.

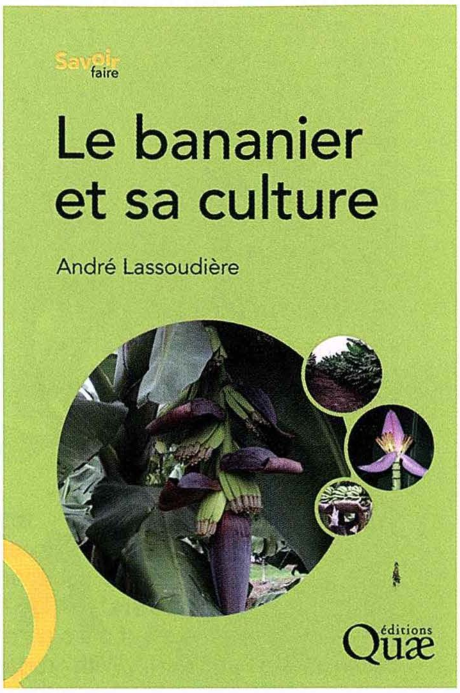
The banane and its cultivation

This book proposes technical and agricultural management systems for sustainable banana farming. After providing an overview of existing knowledge about the plant, parasitic constraints and the recent economic development of this product, the author presents the concepts of integrated and organic banana farming. Taking recent developments into account in the areas of plant health and agriculture, as well as those of fertilisation and irrigation, he then focuses on the different aspects of production: cropping conditions conducive to reducing inputs and, therefore, pollution; optimum practices to obtain satisfactory productivity levels; packaging operations necessary to ensure fruit quality; decision-making techniques for integrated cultural practices.

The author

André Lassoudière, engineer at CIRAD since 1967, has worked both as a researcher in the area of banana production, as well as an advisor to planters and professional organisations in the sector. In addition to his extended stays in Côte d'Ivoire, Cameroon and the French West Indies, he has carried out many expert missions throughout the world.

The summary



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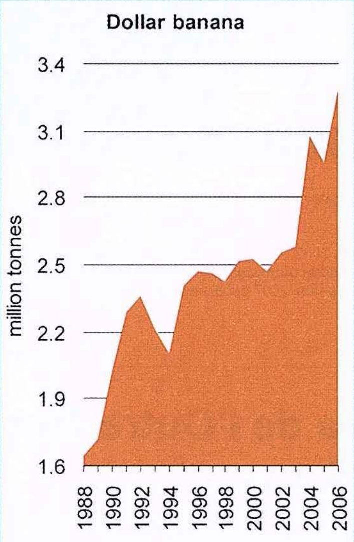
Dollar origins

Costa Rica was clearly the winner in 2006. With nearly 825 000 tonnes put on the market(+ 32%), it returned to the highest levels of 2004 just before climatic catastrophes hit the production zone. Whereas some suppliers such as Colombia and Ecuador chose between the American and European markets, Costa Rica gained on both fronts (+ 13% in exports to the USA). Colombia increased its exports to the EU by nearly 60 000 tonnes but lost 40 000 tonnes in shipments to the USA. Ecuador considers that it was hard done by in Europe (- 40 000 tonnes) and increased exports to the USA by 90 000 tonnes. Panama increased its shipments, with all the fruits going to Europe. For reasons of commercial opportunism, Guatemala shipped large quantities to Europe in mid-year but remained concentrated above all on the United States. Honduras continued its slow decline and Venezuela reduced shipments slightly, remaining focused on Europe. Two supplier countries—Brazil and Peru—are gaining ground but for different reasons. The former is quietly approaching sales of 100 000 tonnes in Europe and is now the fifth largest non-ACP supplier. Its development is based on the projects of large transnational corporations. Peru is continuing to invest in the organic and fair trade segments, somewhat like the Dominican Republic among ACP origins.



Source: Eurostat

vulnerable supply origins are trying to set up alternative strategies. The Caribbean ACP countries, in conjunction with several British distributors, are turning to fair trade and community producers are defending their positions on the domestic market by controlling market release and vigorous promotion of their advantages.

So who was the big winner in 2006? Consumers to a certain extent, distributors with no doubt and certainly the member states. The revenue from customs dues exceeded EUR 600 million in 2006. This is nearly 400 million more than in 2005! This is enough to set up fine development projects on community ■

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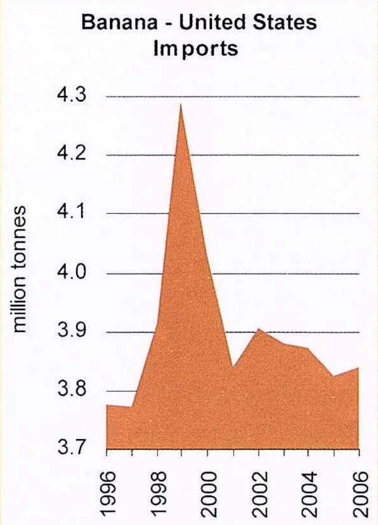

Source: customs

US market

The US market performed very well in 2006, with the quantities imported remaining stable. It might seem paradoxical to praise such a trend but indeed there is satisfaction. Consumption has decreased since the early 2000s. Consumption support policies, in particular via the IBA (International Banana Association), had no effects. For years, diets of the Atkins type damaged the nutritional image of banana. Does 2006 mark the beginning of a reversal in trend? One might believe this in the light of the first results from 2007 that confirm and amplify the favourable movement. Indeed, imports displayed a 6.4% net increase in the first two months of the year. Consumption is around 11.5 kg per capita, putting the USA in the leading group of developed countries. Ecuador (+ 90 000 t) remained the leading supplier in 2006, just ahead of Costa Rica, which strongly reinforced its positions (+ 105 000 t). In contrast, Guatemalan exports (- 116 000 t) plummeted, with exporters preferring to ship some quantities to Europe. Exports from Colombia and Honduras decreased by 30 000 to 40 000 tonnes in each case.

Banana — European Union to 25 — Evaluation of banana supplies — Tonnes

Year	Banana type or origin			Sub-total	Exports	Supplies
	Community	ACP	Others ($)			
1988	719 270	514 061	1 644 100	2 877 431	17 265	**2 860 166**
1989	698 925	544 441	1 716 175	2 959 541	13 415	**2 946 126**
1990	710 635	621 875	2 024 248	3 356 758	36 219	**3 320 539**
1991	695 402	596 416	2 286 019	3 577 837	53 468	**3 524 369**
1992	711 191	680 191	2 365 883	3 757 265	39 689	**3 717 576**
1993	646 242	748 120	2 219 721	3 614 083	36 138	**3 577 945**
1994	584 622	726 927	2 102 303	3 413 852	58 044	**3 355 808**
1995	658 206	763 966	2 405 180	3 827 352	43 082	**3 784 270**
1996	684 605	800 074	2 471 263	3 955 942	30 598	**3 925 344**
1997	810 537	693 054	2 464 412	3 968 003	16 571	**3 951 432**
1998	786 232	615 596	2 426 419	3 828 247	26 448	**3 801 799**
1999	729 303	675 993	2 522 455	3 927 751	27 359	**3 900 392**
2000	782 176	756 808	2 528 170	4 067 154	35 327	**4 031 827**
2001	767 268	728 776	2 474 665	3 970 709	34 284	**3 936 425**
2002	790 622	726 452	2 554 508	4 071 582	8 011	**4 063 571**
2003	754 216	786 798	2 578 827	4 119 841	6 020	**4 113 821**
2004	750 910	782 598	3 073 764	4 607 272	11 029	**4 596 243**
2005	648 395	764 357	2 959 464	4 372 216	4 970	**4 367 246**
2006	**641 559**	**905 692**	**3 290 022**	**4 837 273**	**8 392**	**4 828 881**
	(1)		(2)		(3)	

(1) 1988 to 1993 inclusive: Eurostat + European Commission data for Madeira and Greece. From 1994 onwards: supplementary aid data.
(2) Eurostat data: all imports from non-community and non-ACP countries.
(3) Duty-paid bananas (released for free circulation) in one of the EU-25 member countries and then exported outside EU-25.
General note: before 1994: dessert bananas + plantains / From 1994 onwards: dessert bananas. Before 1995: EU-12 / From 1995 to 2003: EU-15 / Then from 2004 onwards: EU-25. 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* 2007 published by CIRAD for ODEADOM.
Source: Eurostat, European Commission / Processing: Cirad Market News Service

Banana — EU-25 imports — 2006

Tonnes	FR	BE-LU	NL	DE	IT	UK	IE	DK	GR	PT	ES	SE	FI	AT	PL	HU	CZ	SK	SI	EE	LV	LT	CY	MT	EU-25
Total 3rd count.	**173 597**	**1 155 525**	**159 642**	**853 938**	**513 201**	**855 684**	**40 752**	**9 115**	**43 827**	**104 783**	**75 635**	**96 034**	**17**	**4 072**	**61 413**	**5 904**	**5 965**	**66**	**29 534**	**89**	**4 814**	**269**	**0**	**1 840**	**4 195 714**
of which ACP	172 555	240 415	834	114	10 240	466 454	2 939	1	11	8 810	2 442	0	0	0	475	162	0	0	242	0	0	0	0	0	905 692
Ecuador	21	224 179	9 018	288 465	296 634	4 285	582	2 798	36 439	24 438	67 160	6 764	17	99	49 107	1 794	21	0	9 236	0	4 774	110	0	508	1 026 447
Colombia	752	402 380	86 512	226 457	66 300	97 793	2 850	5 237	0	27 029	1 149	968	0	3 870	3 140	2 285	379	0	19 339	0	40	104	0	1 332	947 915
Costa Rica	111	181 244	35 108	159 817	101 755	195 269	29 002	1 078	5 763	35 149	4 118	64 227	0	103	5 049	1 156	5 338	0	284	0	0	21	0	0	824 590
Panama	0	55 072	653	166 678	23 061	24 751	3 876	0	1 595	7 250	0	24 075	0	0	3 642	0	228	0	293	89	0	0	0	0	311 260
Cameroon	18 186	120 432	0	0	0	115 736	0	0	0	4 765	0	0	0	0	0	0	0	0	242	0	0	0	0	0	259 360
Côte d'Ivoire	100 450	82 298	0	0	20	38 986	0	0	0	3 410	2 442	0	0	0	0	162	0	0	0	0	0	0	0	0	227 767
Dominican Rep.	0	24 742	737	88	10 220	140 970	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	176 756
Brazil	0	10 360	1 019	7 924	14 854	58 578	0	0	20	2 088	651	0	0	0	0	0	0	0	100	0	0	0	0	0	95 595
Belize	0	0	0	0	0	70 268	2 939	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	73 207
Suriname	44 660	0	0	0	0	0	0	0	11	0	0	0	0	0	475	0	0	0	0	0	0	0	0	0	45 146
St Lucia	0	0	0	0	0	36 726	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	36 726
Jamaica	0	1 529	0	0	0	30 334	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	31 863
Guatemala	0	0	22 364	61	0	3 205	1 504	0	0	0	0	0	0	0	0	285	0	0	0	0	0	0	0	0	27 418
Ghana	9 259	11 357	97	0	0	2 843	0	0	0	635	0	0	0	0	0	0	0	0	0	0	0	0	0	0	24 190
Peru	1	14 179	3 978	4 396	0	0	0	0	0	20	95	0	0	0	0	0	0	0	0	0	0	33	0	0	22 703
Honduras	0	18 390	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	18 390
St Vincent	0	0	0	0	0	17 239	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	17 239
Venezuela	140	9 124	0	0	0	5 311	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14 575
Dominica	0	0	0	0	0	13 298	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	13 298
Mexico	17	181	139	0	359	19	0	0	0	0	21	0	0	0	0	223	0	66	0	0	0	0	0	0	1 024
Total Intra, incl.	**234 704**	**25 349**	**119 779**	**444 656**	**140 112**	**68 841**	**10 810**	**78 257**	**53 202**	**38 019**	**57 563**	**92 033**	**63 363**	**126 722**	**181 113**	**60 411**	**125 088**	**66 387**	**6 621**	**14 196**	**19 320**	**21 884**	**2 858**	**2 725**	**1 993 784**
Total EU-15, incl.	233 467	25 015	118 965	428 826	126 715	68 839	10 810	78 248	52 803	38 019	57 531	92 033	61 326	123 323	165 849	52 458	95 628	24 682	6 621	7 603	11 470	10 251	2 858	2 725	1 896 064
Belg.-Lux.	143 083	0	78 165	293 618	25 207	26 752	450	2 604	418	6 390	10 729	7 053	6 361	27 857	48 461	22 516	11 853	8 905	1 180	2 615	885	1 123	0	0	726 224
Germany	36 131	2 740	34 341	0	19 610	254	516	50 394	20	228	0	34 965	14 949	77 192	88 286	20 679	38 945	13 262	1	4 704	9 436	2 446	0	0	449 100
Netherlands	13 528	9 009	0	56 109	43 158	19 637	136	18 006	49	216	11 023	29 789	19 379	17 407	12 759	1 349	16 236	280	481	123	1 129	6 240	2	25	276 067
France	0	8 551	970	51 031	23 514	13 514	1 153	104	0	8 659	26 946	1	2	456	12 979	936	22 706	856	19	0	0	422	0	0	172 818
Italy	23 706	2 310	4 080	21 513	0	48	16	823	52 317	7 715	945	0	0	411	2 903	2 104	5 083	976	4 518	52	21	0	869	2 676	133 083
Portugal	5 395	0	0	1	14 228	1 189	0	0	0	0	7 703	0	0	0	0	0	0	0	0	0	0	0	0	0	28 515
Sweden	0	0	584	786	0	0	0	5 921	0	0	0	0	20 636	0	0	0	0	0	0	21	0	21	0	0	27 970
United Kingdom	8 631	0	657	297	766	0	8 539	393	0	0	184	3 478	0	0	0	164	0	0	0	0	0	0	0	0	23 108
Spain	2 093	1 306	94	2 950	109	298	0	4	0	14 811	0	0	0	0	56	0	60	20	0	0	0	0	0	0	21 800
Denmark	0	1 097	16	237	0	0	0	0	0	0	1	14 592	0	0	0	0	0	0	0	0	0	0	0	0	15 943
Austria	832	0	0	2 218	123	0	0	0	0	0	0	0	0	0	5	4 709	745	383	422	0	0	0	0	0	9 437
Ireland	21	0	0	1	0	7 127	0	0	0	0	0	0	0	0	401	0	0	0	0	0	0	0	0	25	7 575
Finland	0	0	0	65	0	0	0	0	0	0	0	2 156	0	0	0	0	0	0	0	88	0	0	0	0	2 309
Greece	0	0	40	0	0	21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1 987	0	2 048
Luxembourg	47	1	19	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	69
Total NMS, incl.	1 237	167	407	7 915	6 699	1	0	5	200	0	16	0	1 018	1 700	7 632	3 977	14 730	20 852	0	3 297	3 925	5 817	0	0	79 593
Czech Rep.	877	42	0	1 913	0	0	0	0	0	0	0	0	0	128	5 882	95	0	19 076	0	0	395	251	0	0	28 658
Poland	255	125	387	5 534	359	1	0	0	0	0	16	0	0	918	0	817	8 771	1 705	0	0	3 497	2 480	0	0	24 864
Slovakia	9	0	0	0	0	0	0	0	0	0	0	0	0	559	303	2 060	5 861	0	0	0	0	0	0	0	8 792
Slovenia	96	0	0	2	6 340	0	0	0	0	0	0	0	0	95	0	865	19	0	0	0	0	0	0	0	7 416
Lithuania	0	0	20	82	0	0	0	0	0	0	0	0	20	0	1 124	0	0	0	0	2 764	0	2 994	0	0	7 005
Estonia	0	0	0	0	0	0	0	5	0	0	0	0	998	0	323	0	0	0	0	0	0	92	0	0	1 418
Latvia	0	0	0	277	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	533	33	0	0	0	843
Malta	0	0	0	0	0	0	0	0	200	0	0	0	0	0	0	139	60	0	0	0	0	0	0	0	399
Hungary	0	0	0	107	0	0	0	0	0	0	0	0	0	0	0	0	19	72	0	0	0	0	0	0	197

Source: Eurostat