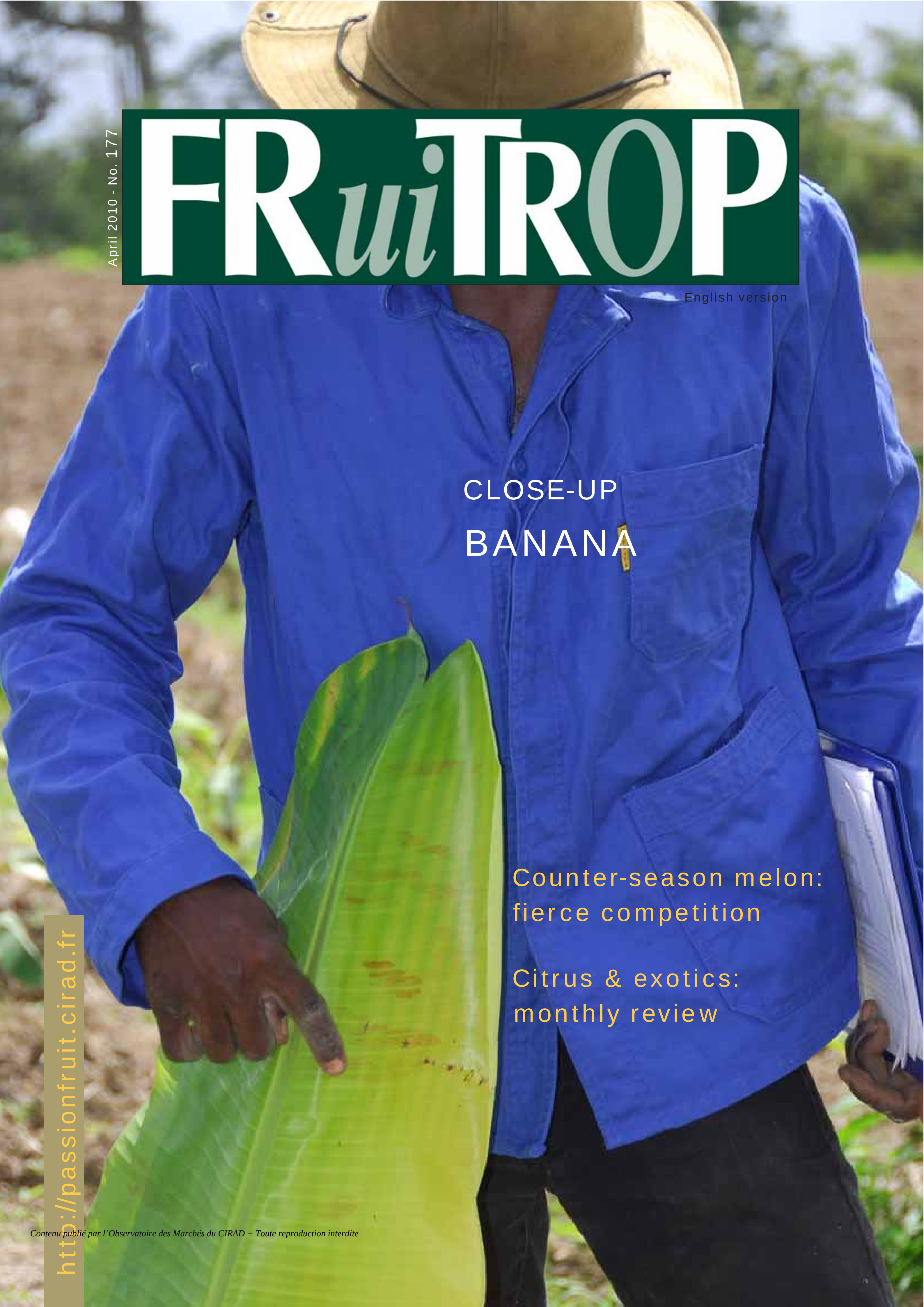


FRuiTROP

April 2010 - No. 177

English version

CLOSE-UP

BANANA

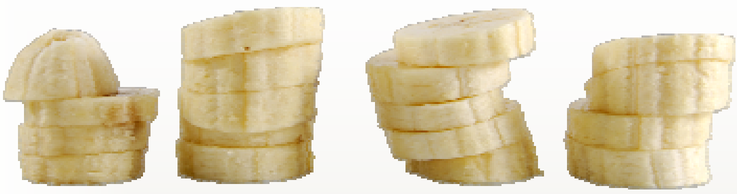
Counter-season melon: fierce competition

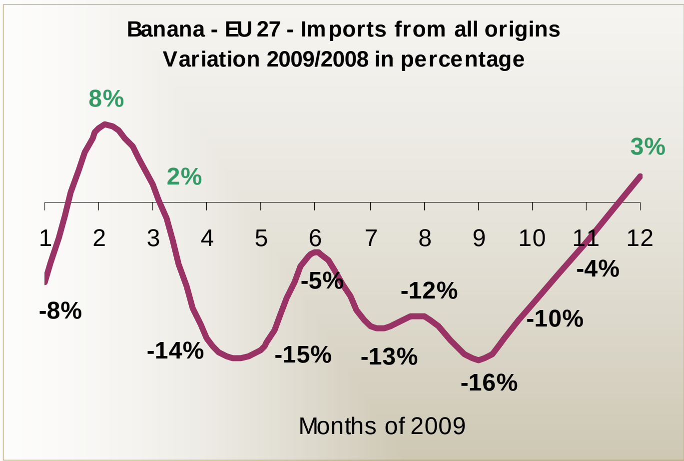
Citrus & exotics: monthly review

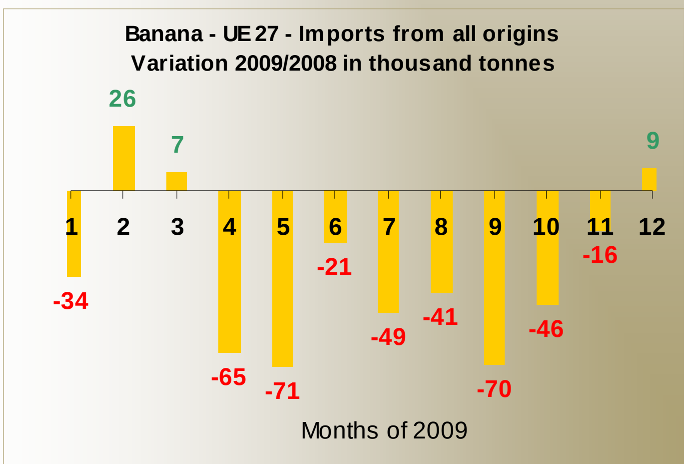
http://passionfruit.cirad.fr

Review of supply of the European banana market

As slow as expected

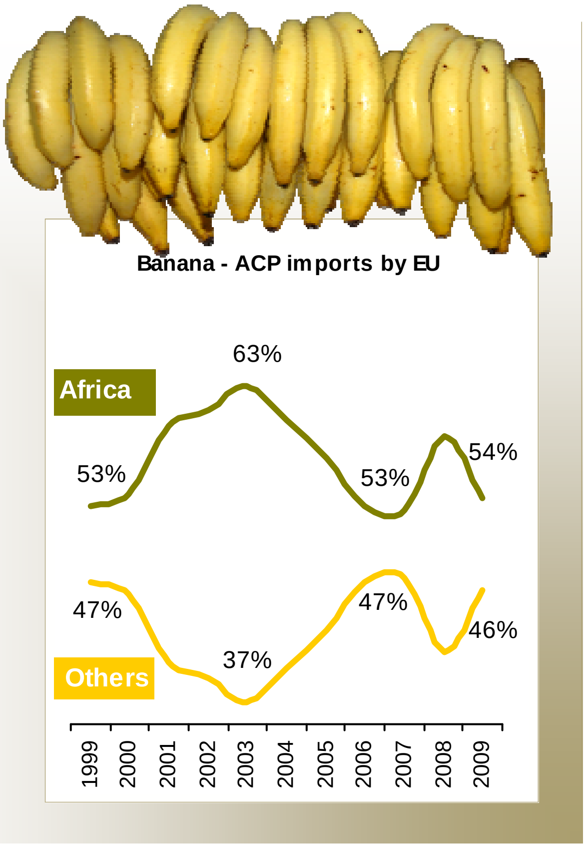






For those impressed by symbols, EU banana consumption in 2009 remained above 10 kg per person in 2009. But after three years of steady growth, the figure dipped by 700 g. After perusing these lines, an inattentive or suspicious reader will blame the level of EU customs dues levied on imports from Latin America, accused of affecting flows of banana imports. However, I suspect that the decrease is related less to politics than to weather. For if you had to choose a single reason for this sudden decrease in consumption and hence in imports it would be the very marked fall in supply from Costa Rica. The world's third largest exporter reduced its presence on the world market by a fifth. And that is the average for the year. The decrease was as much as 50% in some weeks! This obviously had a impact on import figures of the world's two main markets—the European Union and the United States, with Costa Rica's share decreasing by 16% and 38% respectively. The export shortfall from Costa Rica alone was nearly half a million tonnes, that is to say the equivalent of 11 months of French consumption!

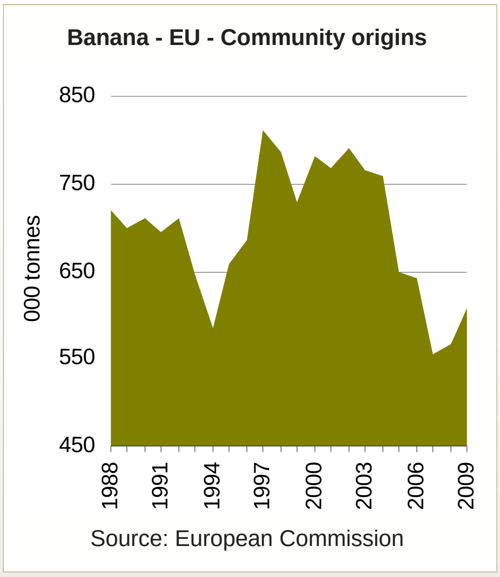
Panama, Honduras, Guatemala and Nicaragua were also affected by the bad weather that swept Central America. Colombian exports were also smaller. Finally, world supply to the two large import regions (North America and Europe/Russia/Mediterranean) shrank by nearly a million tonnes in 2009! In the EU alone, net imports (after the deduction of re-exports) fell by 8% to 4.5 million tonnes. When European production is added (608 000 t), net supply to EU-27 was 5.1 million tonnes in 2009, 6% less than in 2008. Non-ACP third country sources (MFNs) supplied 69% of European consumption against 19% from ACP sources and 12% accounted for by European production.

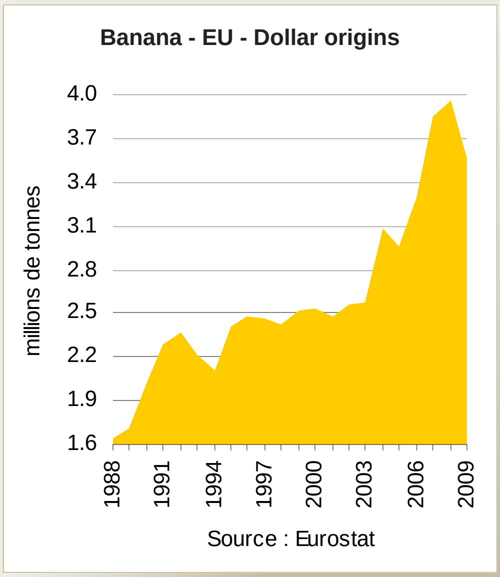


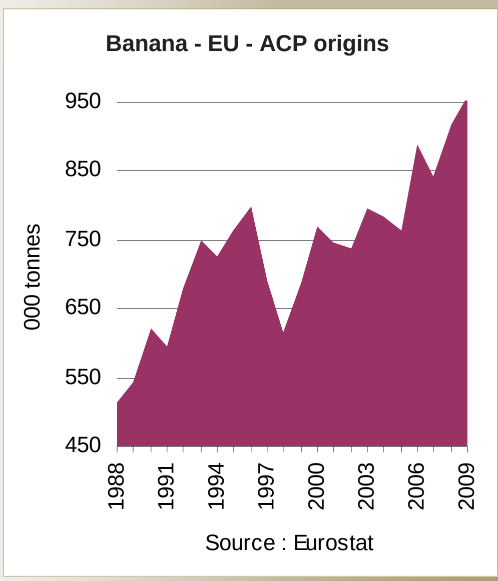
Costa Rica has chosen its side

It is interesting to see how supply sources spread exports among the various markets. Colombia reduced shipments to both the United States and Europe by 6%. Costa Rica chose its side by favouring exports to the EU. Ecuador used its production reserves for operations on the spot market as when world supplies are short, it becomes a very attractive alternative source since it handles very few medium-term contracts and has strong production potential. The good prices obtained by Ecuadorian growers were mentioned in the January 2010 issue of **FruiTrop** (No.174, January 2010, pages 19 ff), especially in the first half of 2009: USD 7.20 per box, that is to say USD 1.80 higher than the minimum price.

The presence of Honduran (- 65%) and Guatemalan (- 74%) fruits dwindled markedly in the EU as both sources favoured the American market. There was less of a dilemma for Panama as it has favoured exports to the EU since the end of the 1990s. Although it was a delicate year,







Photos © Guy Bréhinier et Régis Domergue

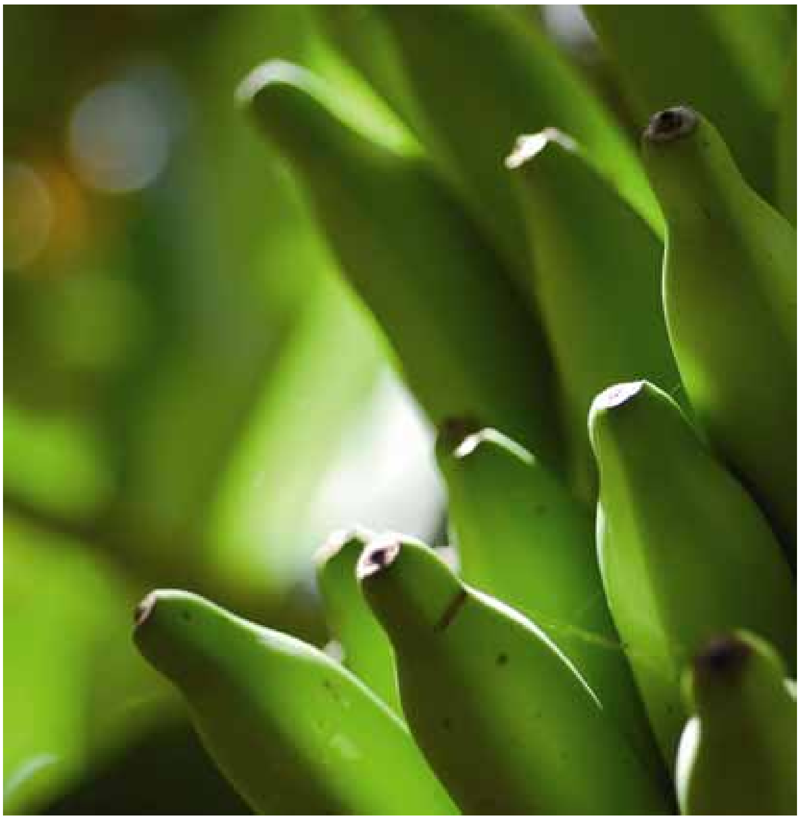
Guatemala remained the leading supplier of the United States with a 31% market share. It hardly appears at all in European statistics.

Brazilian presence on the European market decreased steadily to 56 000 tonnes after a peak at practically double this quantity in 2006. This is a major trend that could become reversed. Indeed, the serious flooding that hit the Del Monte plantation in Rio Grande do Norte state was a handicap for the presence of this source on the international market. However, Del Monte has just announced 2011 production of 1 million boxes (500 hectares) from its plantations in Limoeiro do Norte (Ceara).

Apart from Ecuador, few sources weathered 2009 unscathed. They include Peru, which breaks records year after year. Like the Dominican Republic, it has invested in organic and fair trade banana (see below). The rate of extension of plantations remains high—not only for banana but also for other fruits crops such as avocado and mango.

ACP sources hold 19% of the market

In contrast with dollar sources, the ACP countries performed well in 2009, gaining 4% to reach 958 000 tonnes and setting a new record. Their market share gained 19% (+ 2 points). Closer analysis shows that the dynamics of the ACP group is not homogeneous. In the 1990s and the early 2000s, Africa dominated the rest of the group. Three very different types of dynamics can now be observed. In the category of stable suppliers over the last ten years (with a few inter-annual variations), Côte d'Ivoire ships 200 000 to 230 000 t, Cameroon 220 000 to 300 000 t, Belize between 40 000 and 80 000 t and St Lucia between 30 000 and 40 000 t. The group whose exports are decreasing or even stopping consists of St Vincent, with slow but sure slowing, and Jamaica, which has disappeared completely from the market after being repeatedly hit by hurricanes (see accompanying sheet). Of the sources shipping more, two have recently launched or re-launched their banana sector (Ghana and Surinam) and, above all, the Domini-



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can Republic has increased shipments to Europe fourfold in less than a decade, now exceeding 250 000 tonnes, consisting mainly of organic and fair trade produce.

European production recovering

After a five-year decrease from 2003 to 2007 and two years of stagnation in 2008 and 2009, European production is now getting under way again. It is difficult to sort out the downward trend common to all sources, weather problems and earthquakes and even political features that have all affected West Indian production in recent years and the determination to limit production in the Canary Islands. With 236 000 tonnes shipped in 2009, the

Banana consumption per capita in 2009

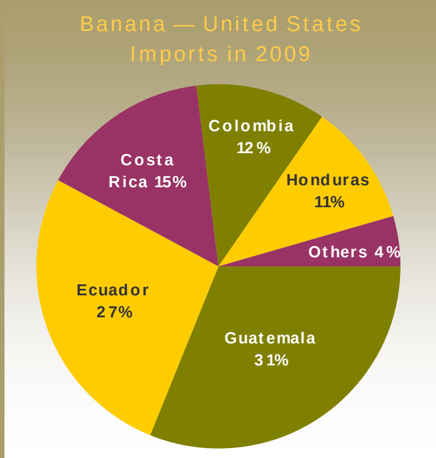
	kg/year
EU-27	10.2
EU-15	11.3
NMS-12	6.2

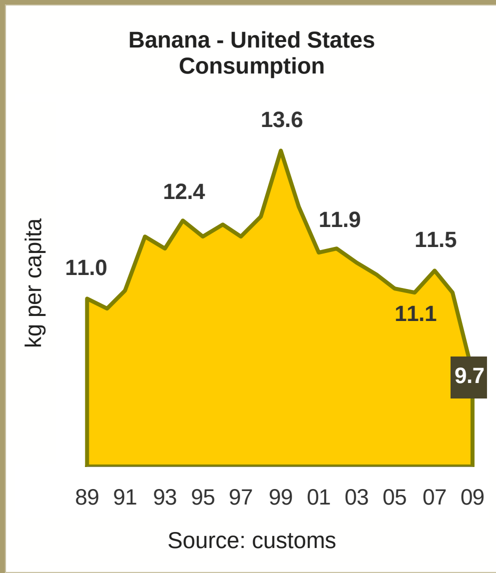
Source: Cirad

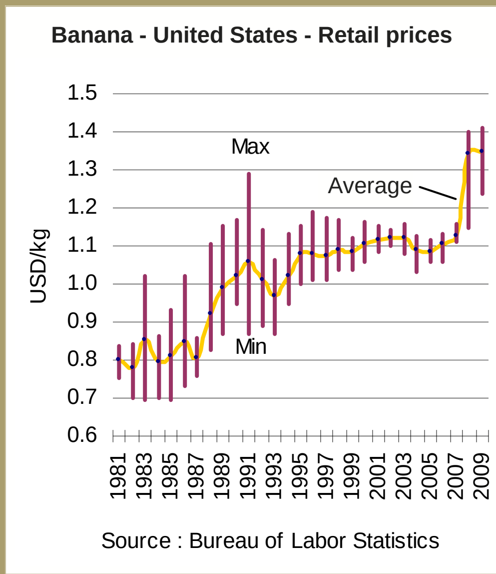
The United States banana market: down and down again

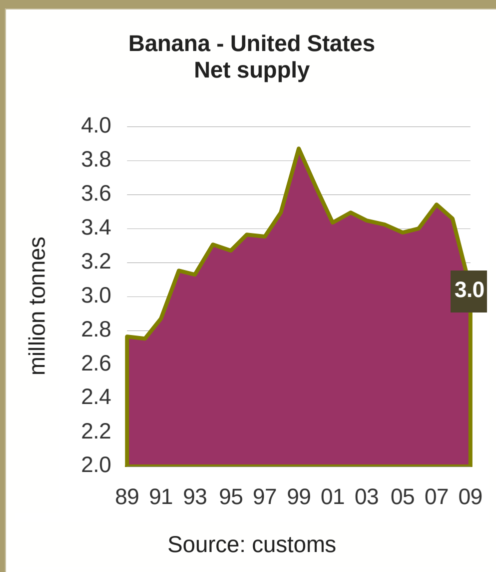
The American market ran into trouble again in 2009 in no uncertain way! Net supply was the lowest since 1991 at only 3 041 594 tonnes, that is to say 12% less than in 2008. This is far from the nearly 3.9 million tonnes imported in 1999. In contrast, re-exports broke records at 538 000 tonnes. Canada was the destination for 98% of this. The increase in population means that annual per capita consumption fell to a hitherto unknown 9.7 kg. The figure has decreased by 4 kg in a decade.

Ecuador benefited from the difficulties experienced by Central American suppliers such as Guatemala, whose shipments decreased by 6% although this source was still the leading supplier of the American market, and Costa Rica and Honduras with dips of 38% and 23% respectively. The presence of Colombia was also reduced in the same proportions as on the European market (- 6%). Ecuador thus made a choice, selling on the spot market and doing 15% better than in 2008 but still less than a million tonnes. It is true that the prices proposed by the American market were very attractive. The average annual spot market price rose to nearly USD16 per box, a 4% increase in comparison with 2008 and 47% more than in 2007! The retail price did not shift at all in 2009, remaining at the USD1.35 peak. A reversal of the 2009 trend was confirmed in the early months of 2010, following the marked decrease in import prices. In terms of volume, the market started a timid recovery with a 2% increase in imports in January 2010. Guatemala and Costa Rica returned to the market (+14% and + 3% respectively) and Ecuador shipped 10% less.









Recherche & Développement Durable

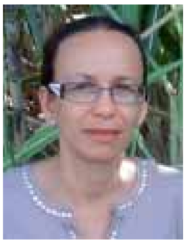
Nouvelle avancée du Plan Banane Durable : la lutte biologique

Depuis plus de 10 ans, la Banane de Guadeloupe & Martinique œuvre à la valorisation et à la protection de la Terre des Antilles. Au cœur de ses actions, la mise en place de nouvelles pratiques culturales qui ont d'ores et déjà permis de diminuer l'utilisation des pesticides de 70%.
Un pas de géant. Mais la filière ne s'arrête pas là.

La lutte biologique, le choix du naturel

Les bananiers doivent régulièrement lutter contre des attaques de champignons, d'insectes ou de mauvaises herbes. Il existe dans la nature des adversaires à chacun de ces parasites. La lutte biologique consiste à utiliser ces agents naturels pour protéger la plante. Dans une logique d'agriculture durable, l'objectif de la filière de production de Banane de Guadeloupe & Martinique est d'utiliser ces substances naturelles en substitution progressive aux pesticides de synthèse.
Un objectif ambitieux compte tenu des étapes à franchir et du temps nécessaire à l'obtention des autorisations européennes.

Travail en collaboration avec les Centres Techniques de la Canne et du Sucre de Guadeloupe et de Martinique



« **Pas moins de 27 essais sont prévus en 2010 en Martinique, 8 concernent la culture de la banane** » confie Isabelle Jean-Baptiste, responsable des expérimentations au CTCS de Martinique. »

QUELQUES EXEMPLES DE SUBSTANCES NATURELLES LUTTANT CONTRE LES PARASITES.

- L'extrait d'arbre à thé contre la cercosporiose (champignon attaquant les feuilles des bananiers)
- L'essence d'orange contre les thrips ou les cochenilles (insectes parasites causant des dommages aux fruits)
- L'huile de citronnelle pour le désherbage
- L'huile de clou de girofle contre les nématodes (vers qui attaquent les racines du bananier)

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UN PROJET EN 3 ÉTAPES

LA SÉLECTION

Il s'agit dans un premier temps d'identifier les agents naturels utilisés sur d'autres cultures, en Europe et dans le monde et qui ont démontré leur efficacité dans ces zones d'utilisation. L'extrait d'arbre à thé pour lutter contre la cercosporiose est, par exemple, actuellement testé dans des bananeraies d'Afrique et d'Amérique centrale.

LES TESTS

Une première phase de tests est réalisée en laboratoire puis sur les bananiers. Les critères des tests sont : l'innocuité pour l'homme et pour l'environnement, et l'efficacité. Ces expérimentations sont conduites par l'Institut Technique de la Banane (ITBAN) en collaboration avec les Centres Techniques de la Canne et du Sucre (CTCS).

L'HOMOLOGATION

Soumis à la même réglementation que les produits phytosanitaires de synthèse, les pesticides d'origine naturelle doivent être autorisés par la Commission européenne sur la base des tests réalisés. Ces démarches nécessitent beaucoup de temps et d'argent, ce qui constitue un frein important au développement de ces méthodes naturelles dans l'Union européenne.

Test d'efficacité de l'extrait d'arbre à thé contre la cercosporiose sur les feuilles de bananier.
Résultat : Pas d'évolution de la maladie à T1=7 jours, T2=14 jours et T3=21 jours.

CAMPAGNE CO-FINANCÉE PAR L'UNION EUROPÉENNE ET L'OFFICE DE DÉVELOPPEMENT DE L'ÉCONOMIE AGRICOLE D'OUTRE-MER

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French West Indies have regained some of the ground lost during hurricane Dean in 2007 and should reach their historic 280 000-tonne level. The volcanic ash that fell on the banana plantations in Guadeloupe at the beginning of this year will fortunately only affect part of this fine recovery. Growers have announced the loss of 20 000 tonnes, that is to say 36% of the total shipped in 2009. The Canaries (352 000 t in 2009) are not far from their 1994 low point at 322 000 tonnes. Measures to bridle supply and voluntary withdrawal of fruits when the market is encumbered (in the spring and especially the summer) have kept Canary shipments at between 350 000 and 370 000 tonnes since 2005. The smaller harvests in Madeira, Greece and Cyprus decreased in 2009, confirming the general trend. Madeiran exports still totalled 43 000 tonnes in 1992 before the single European market. This was three times as much as the 14 500 tonnes shipped in 2009 ■

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Banana — European Union — Evaluation of supply — Tonnes

Year	Banana type or origin			Sub-total	Exports	Supply
	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	763 886	2 405 180	3 827 272	43 082	3 784 190
1996	684 605	798 109	2 471 263	3 953 977	30 598	3 923 379
1997	810 537	692 731	2 464 412	3 967 680	16 571	3 951 109
1998	786 232	614 459	2 426 419	3 827 110	26 448	3 800 662
1999	729 303	688 170	2 522 455	3 939 928	27 359	3 912 569
2000	782 176	770 095	2 528 170	4 080 441	35 327	4 045 114
2001	767 268	747 131	2 474 665	3 989 064	34 284	3 954 780
2002	790 622	738 439	2 554 508	4 083 569	8 011	4 075 558
2003	765 416	797 269	2 578 827	4 141 512	6 020	4 135 492
2004	758 206	782 979	3 077 361	4 618 546	11 029	4 607 517
2005	648 375	763 974	2 959 463	4 371 812	4 970	4 366 842
2006	641 559	889 176	3 306 538	4 837 273	8 392	4 828 881
2007	554 734	842 959	3 848 266	5 245 959	9 270	5 236 689
2008	567 560	918 923	3 964 866	5 451 349	10 002	5 441 347
2009	**608 048**	**958 144**	**3 555 462**	**5 121 654**	**7 884**	**5 113 770**
	(1)	(2)	(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-27 member countries and then exported outside EU-27.
General note: before 1994: dessert bananas + plantains / From 1994 onwards: dessert bananas. Before 1995: EU-12 / From 1995 to 2003: EU-15 / From 2004 to 2006: EU-25 / Since 2007: EU-27. 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. Source: Eurostat, European Commission / Processing: Cirad Market News Service