FRuiTROP

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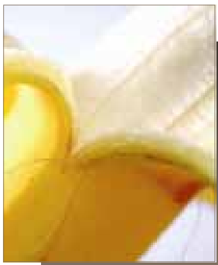
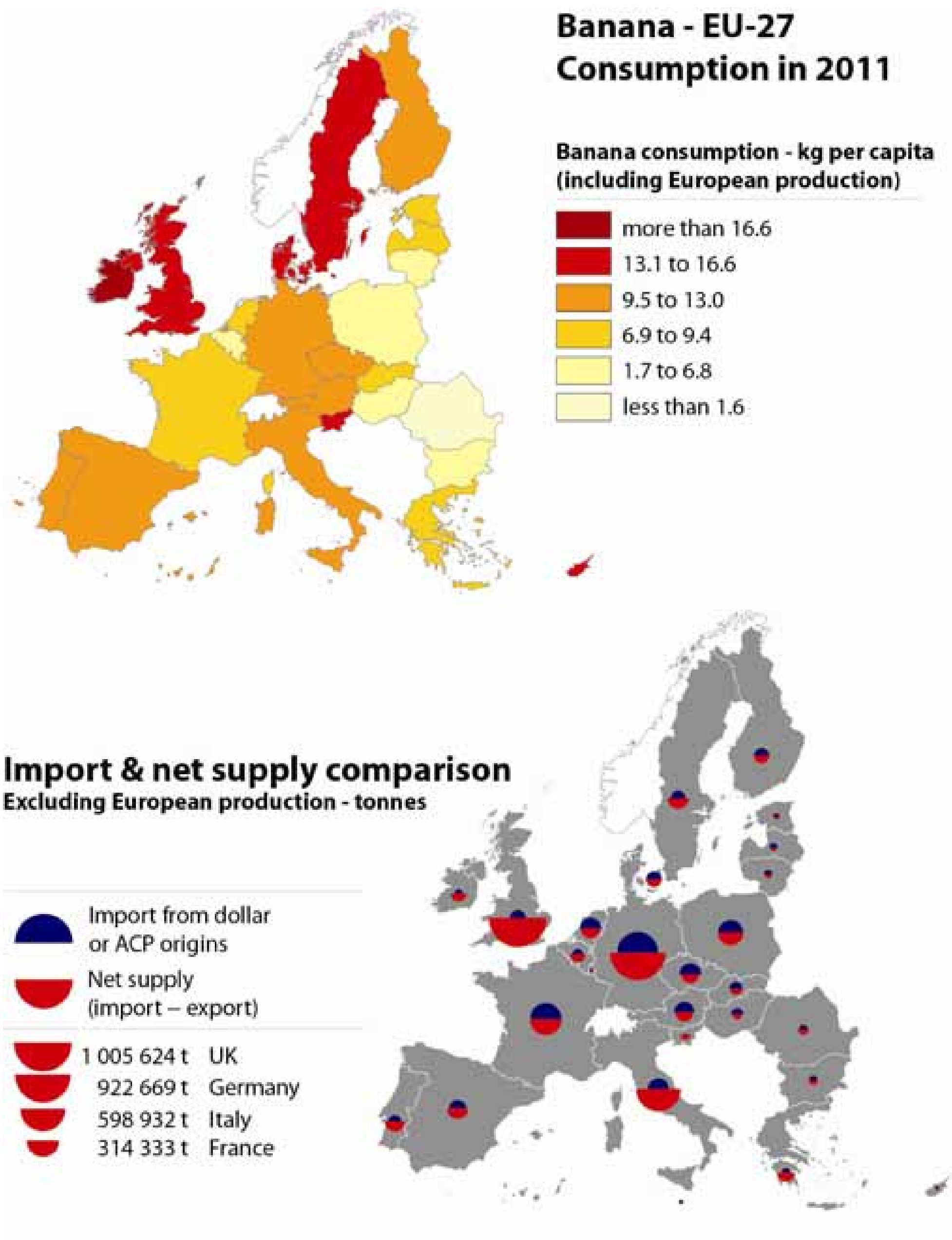


European banana consumption

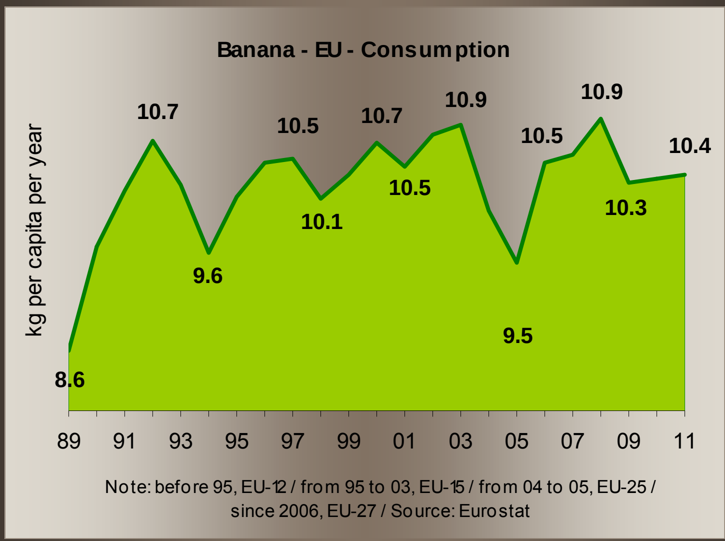
Both good and much less good

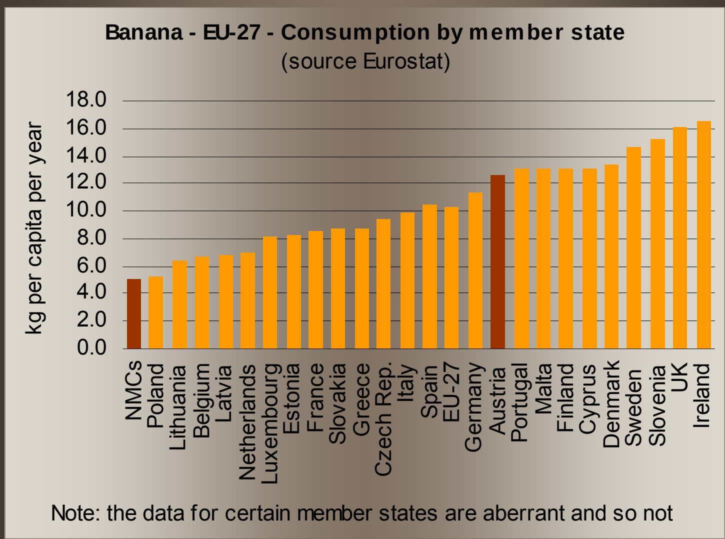


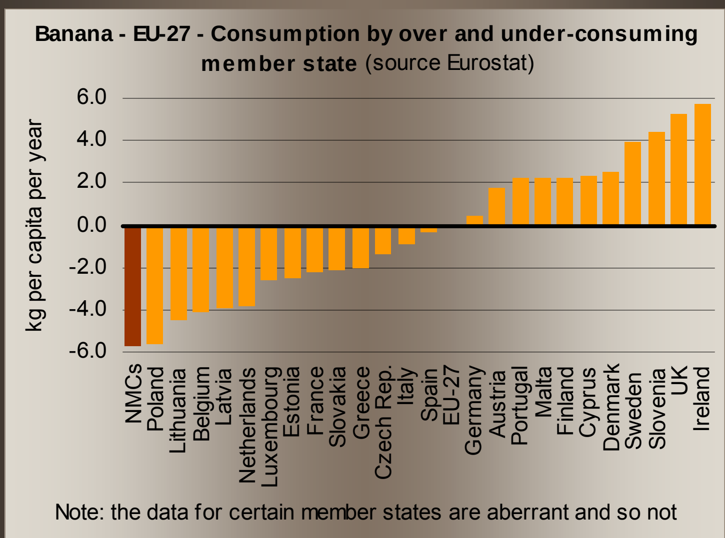
Source: Cirad - FruiTrop / Processing and presentation : philcarto.free.fr, Cirad - FruiTrop

The calculation of European banana consumption by member state is a delicate and difficult operation. It involves juggling with European production and it is not known how much of this—especially in the case of France—is sold outside national metropolitan frontiers, counting sometimes vague re-exports between members, allowing for over-consumption of bananas at the entry points of the fruits (in Slovenia for example) and evaluating ghost imports, especially at the eastern frontier of the EU. It is vain to search for accuracy. This is why I talk in terms of 'apparent' rather than real consumption. In spite of these difficulties, with certain absurd data corrected and others cross-checked, the exercise is extremely instructive.

The first feature is the gap between the countries of EU-15 and the new member states (NMS-12). In 2011 annual apparent consumption in the NMS was less than half that of the average for EU-27 (10.4 kg). The NMS zone displays structural under-consumption of bananas and does not seem to display favourable development. It has even experienced a disturbing downward slide for the last three years. But attention should be paid to data quality. Indeed, levels are exaggeratedly low for at least three of the NMS zone countries (Romania, Hungary and Bulgaria) at 1.7 to 3.9 kg; this has an impact on the figures for the group but does not call into question the weak consumption observed in the eastern part of the European Union.







Two neighbours—Ireland and the United Kingdom—are at the other end of the scale with banana consumption at more than 16 kg per year. This is 160% of the European average. In general, the countries in the north of the EU-15 zone consume more than the average. This is the case of Sweden, Denmark and Finland. The explanation lies in the fairly small availability of competing fruits. It is less difficult to compete with a narrow range of mainly imported fruits than with the range of fruits available in countries like Spain, Italy and France. But France is an exception here again. It displays under-consumption (8.6 kg) while Spain scores better with 10.5 kg (decreasing) and Italy at 9.9 kg (stable). The leading group also includes Austria where consumption is vigorous, having increased from less than 10 kg in 2001 to more than 12.5 in 2011.

The level is greatly over-evaluated in Slovenia which supplies a fair proportion of the Eastern Mediterranean and Eastern European countries via the port of Koper. The leading group also includes two banana producing countries, Portugal and Cyprus. The proportion of national production in consumption

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ranges from nearly 50% in Cyprus to less than 11% in Portugal. Finally, Germany, with the largest population of European countries and consumption at 11.3 kg, draws average consumption upwards. But this is far from the peak of 12.7 kg observed in 2000!

Annual European consumption has been fairly stable at around 10.5 kg for the last ten years. Average consumption fell to 9.5 kg in 2004 and 2005, two difficult years. In 2005, the tariff-only system was about to begin (it came into force on 1 January 2006) and operators had just experienced two years of very low import prices and this encouraged caution in their sales programmes. As mentioned above, the trend is better in EU-15 than in the NMS.

Vox clamantis in deserto

Finally, to have another bash at the idée fixe concerning supermarket chains, there is no link between per capita consumption and average retail prices or even import prices. An in-depth econometric study would confirm these observations. Bananas must be sold at a price that makes sense, that is to say be sold as bananas and not be used as a lure to shift game consoles or moisturising creams. It would be a lie to say that there is no such psychological price threshold for bananas. But we have never been able to define it as we are so far down in the scale of values for produce grown thousands of miles from the production zones. This mental construction must be dismantled as soon as possible in order to increase value-added (or at least no longer lose any) and also to increase sales by stimulating the market. Unfortunately, in practice this is like preaching in the desert. The seminar held in Paris in April by banana growers from Guadeloupe and Martinique ruled out any hope for a change in mentalities. We even reached unsuspected frontiers of commercial obscurantism. Although it was considered that bananas have an objective price that should never be departed from, we also heard that this policy, which is more of a farce, is applied whatever the type of banana: clean, less clean or frankly soiled. The production mode (from both the social and environmental angles) is not allowed for. Only organic and fair trade fruits remain the only exceptions to this rule, but for how long? The gap is closing in a terrible downward spiral that generates despair among hundreds of thousands of workers and small and large plantation owners around the world. Japanese kamikaze pilots had at least a purpose and considered that they were serving their country. I am not sure that the same spirit drives the banana industry because although the retail sector is still earning a good living it could earn a better one while informing consumers about the principles of sustainable development, by ensuring the survival of chains and finally giving a little hope and purchasing power to banana plantation workers around the world. But we are losing our way because consumers only spend a few seconds in front of each item and want to get home to watch the 8 o'clock news! Don't give them a headache by discussing questions of the distribution of value and of danger for the environment—especially if this is a long way from their neighbourhood. Sweet dreams, people. We'll look after all the rest... ■

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