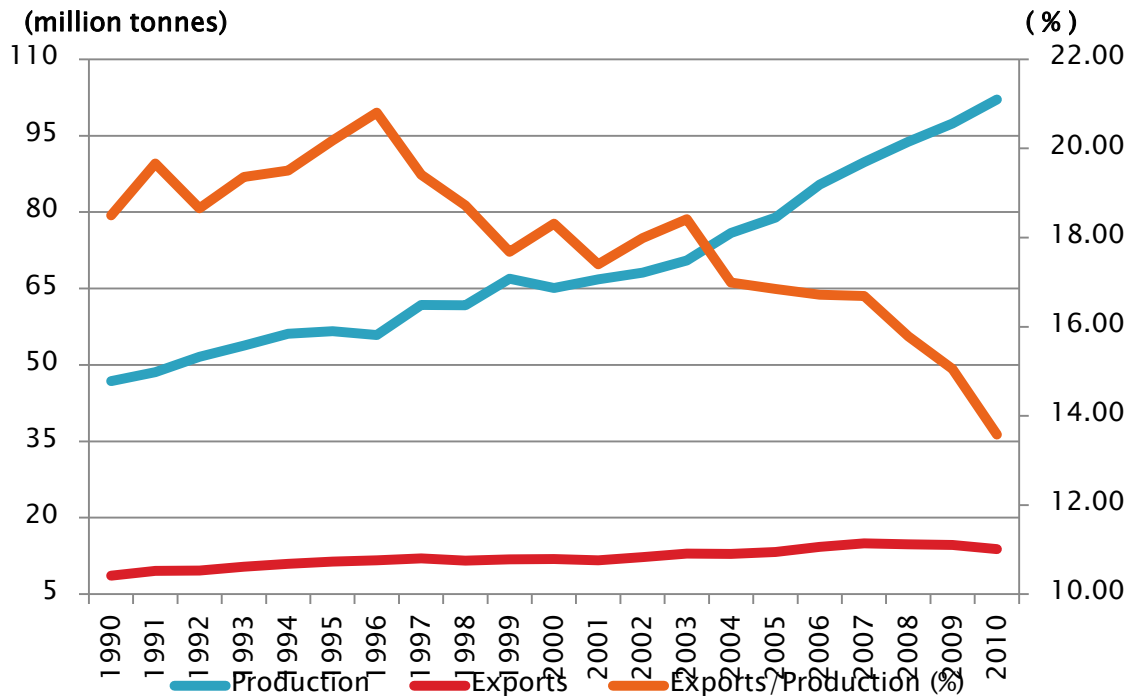


Recent developments in global banana markets

Ekaterina Krivonos
Trade and Market Division
FAO



World production and exports, 1990–2010

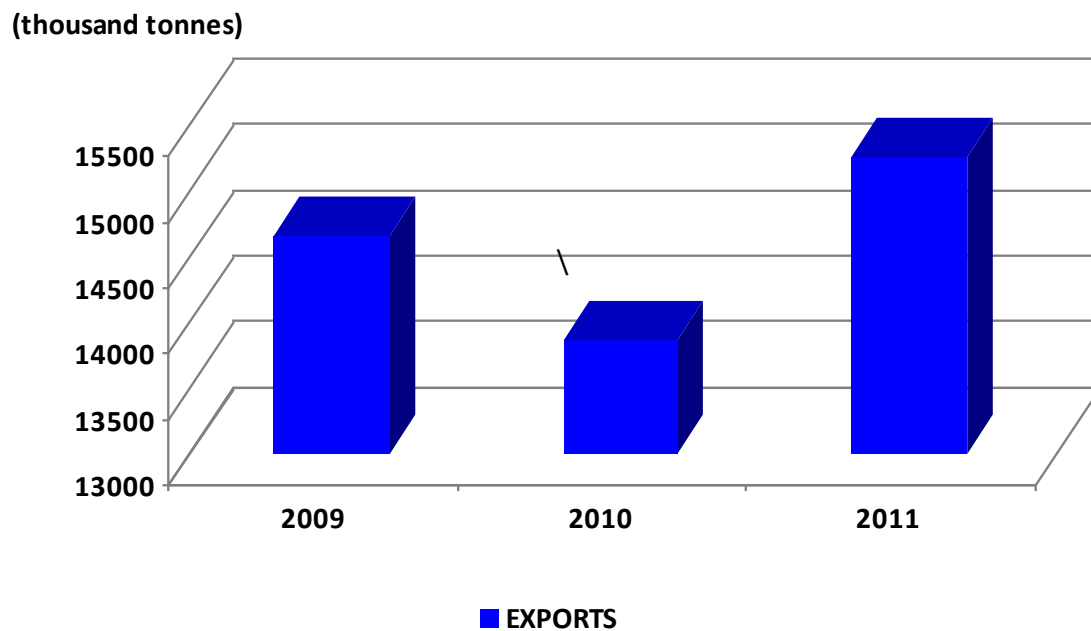


In 2010, world production of bananas reached 102 million tonnes, representing an increase of almost 50 percent from the 65 million tonnes in 2000 and more than double the production in 1990



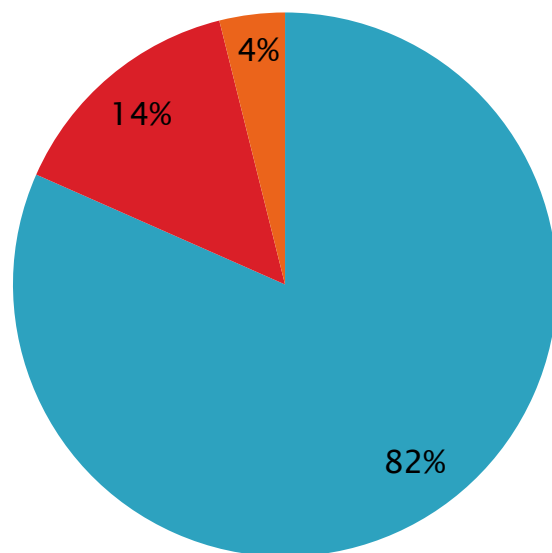
In 2011 world banana exports grew by 7.7%

BANANA WORLD EXPORTS



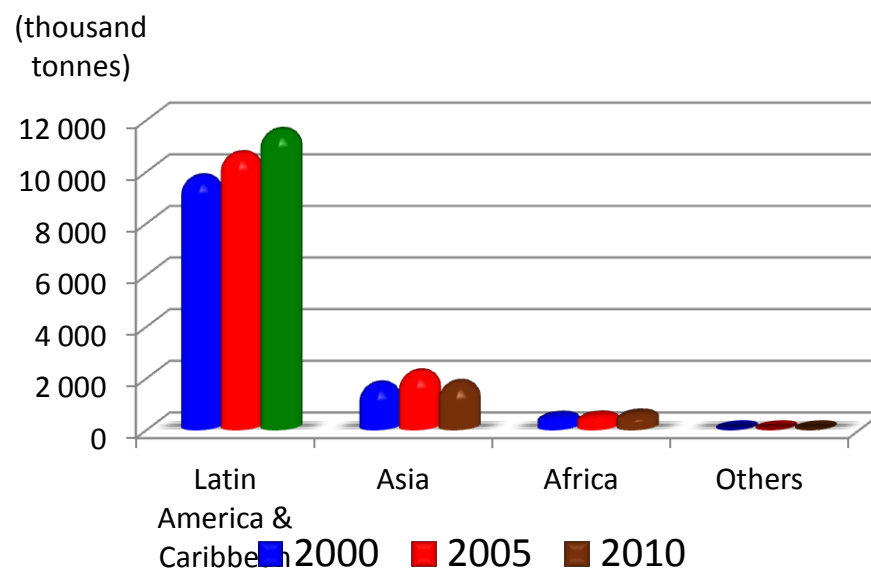
In 2011 LAC region exported 82% of world's bananas

Shares in total volumes of exports in 2011 by region

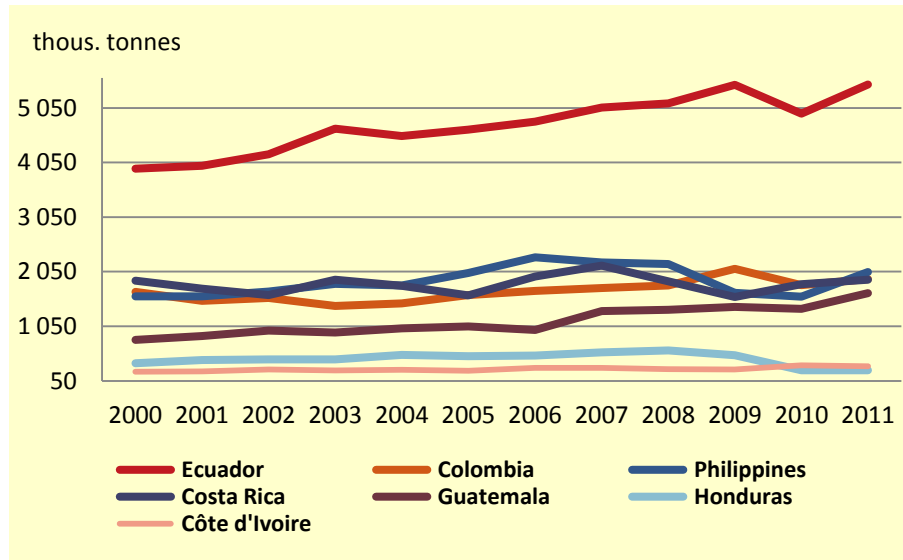


■ Latin America & Caribbean
■ Far East
■ Africa

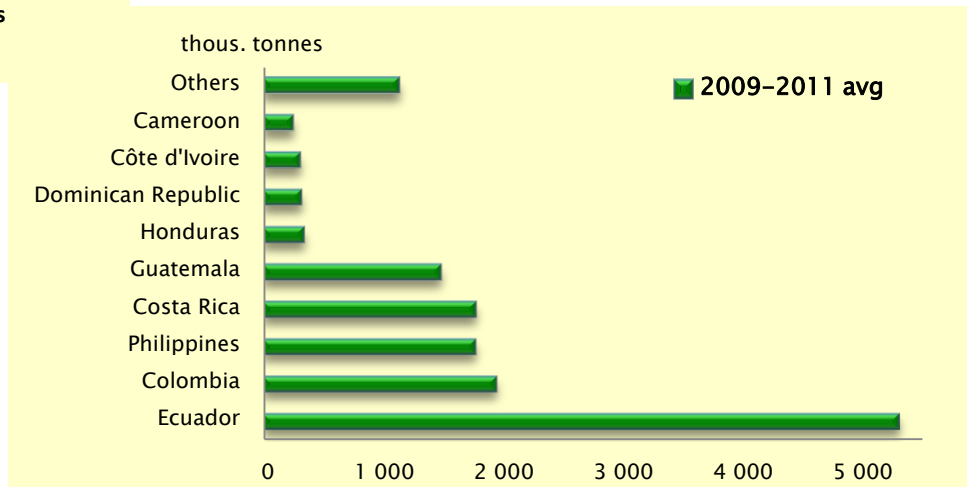
Export volumes in 2000, 2005 and 2010 by region



Ecuador is the dominant exporter with over one third of the market



Banana exports



In 2012 Guatemala and Nicaragua are expected to increase exports substantially

Exports by country in 2011 and 2012, top exporters

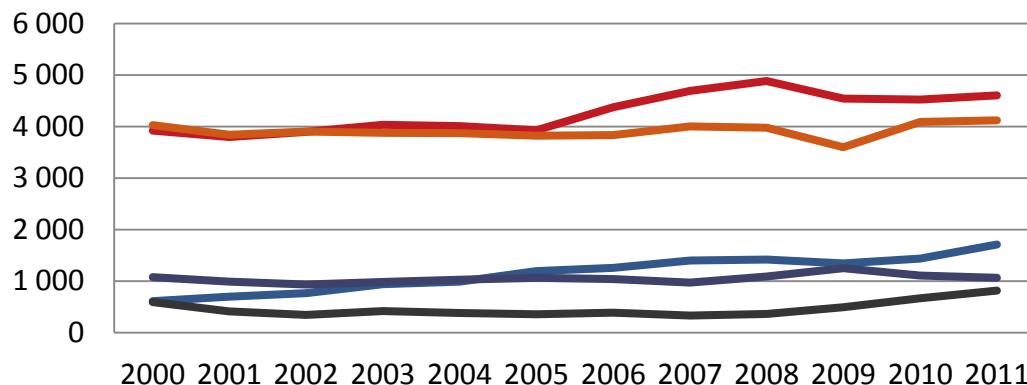
		2011	2012	% change
		(.....000'tonnes)		
Costa Rica	(Jan-Oct)	1 604.2	1 624.8	1.28
Ecuador	(Jan-Oct)	4 488.7	4 158.2	-7.36
Guatemala	(Jan-Oct)	1 296.4	1 691.7	30.50
Mexico	(Jan-Nov)	147.8	167.1	13.05
Nicaragua	(Jan-Nov)	665.3	883.0	32.73
Panama	(Jan-Aug)	143.6	141.6	-1.43
Philippines	(Jan-June)	1 007.0	1 067.0	5.96

Source: Official country data



Among importers, the strongest growth in demand is in the former USSR (11% of all imports in 2011)

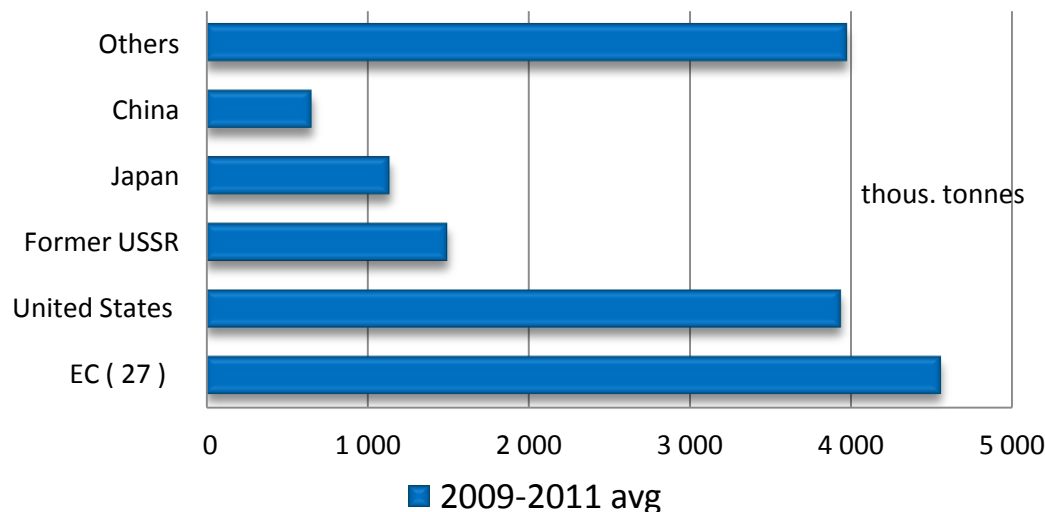
thous. tonnes



— EC (27) — United States
— Former USSR — Japan
— China

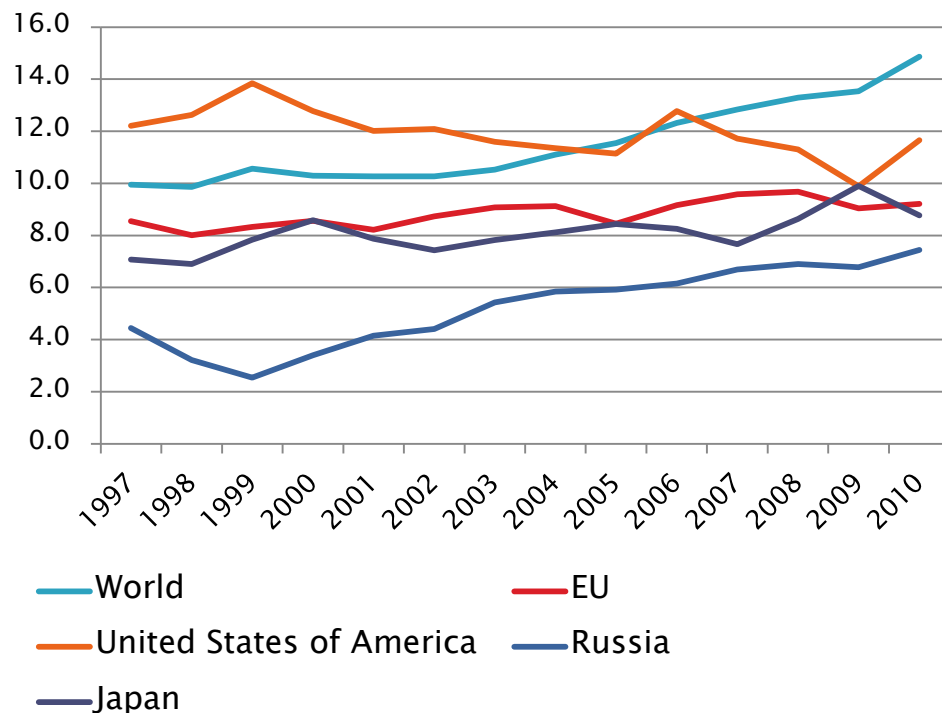
Banana imports

In 2012 US imports are expected to increase by 4.2% to 4,300 tons.



Dynamic growth in world consumption

Per capita consumption of bananas
(kg per capita per year)

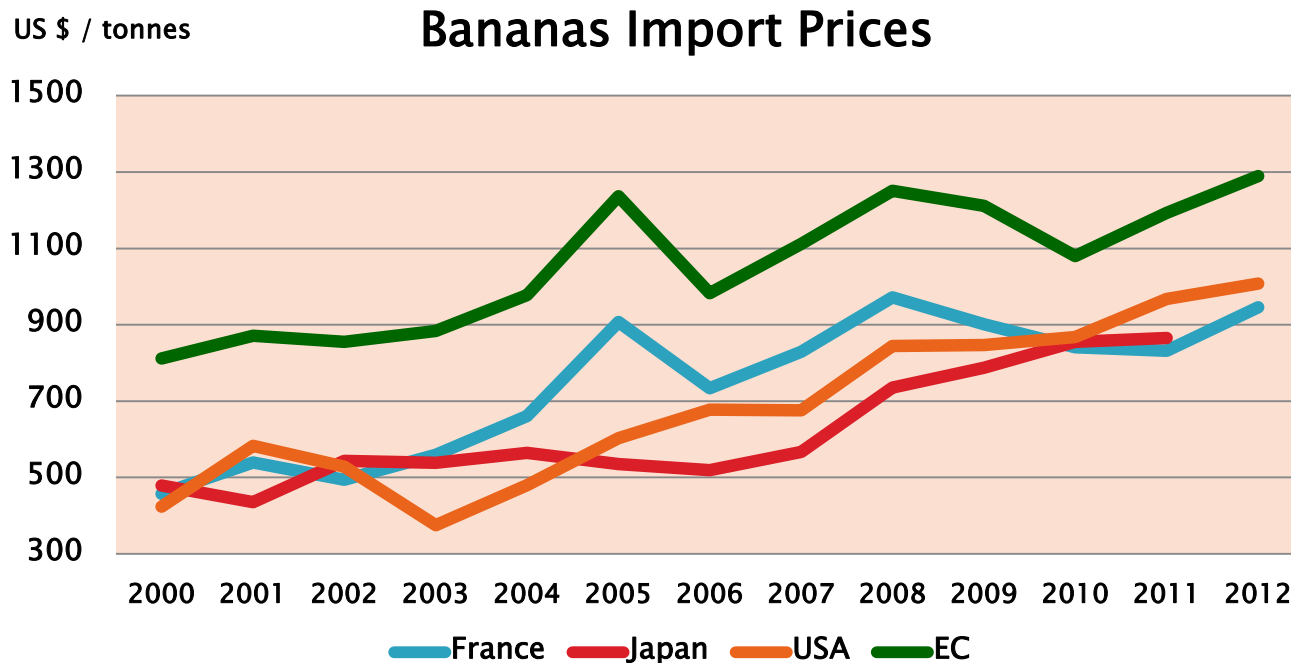


Per capita consumption has increased from 8.6 kg/person in 2002 to 12.5 kg/person in 2010.

Strong growth in Russia at 6.8% annually on average (world: 4.7%) between 2002 and 2010



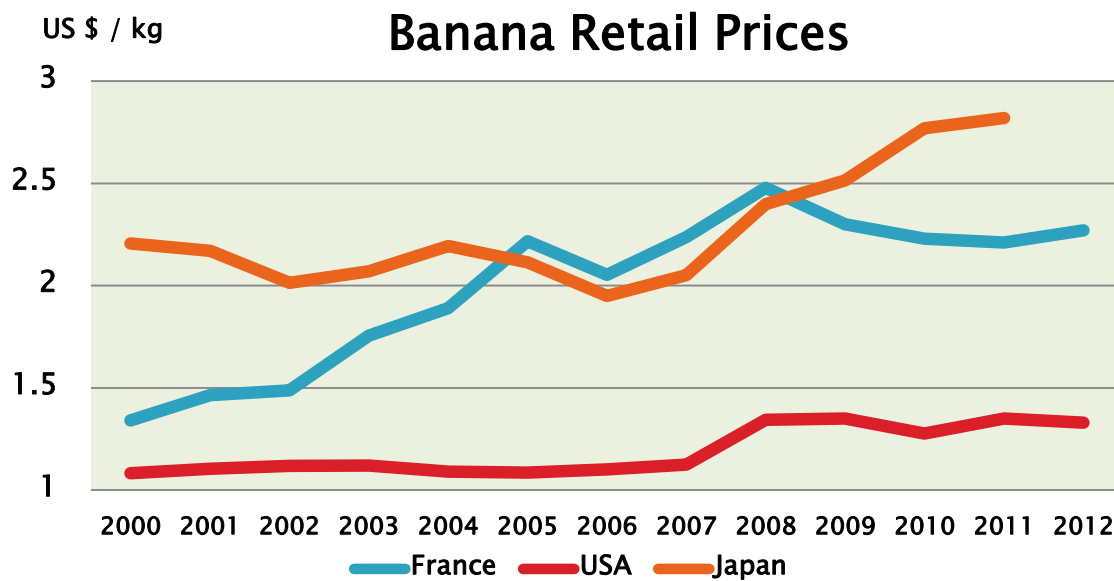
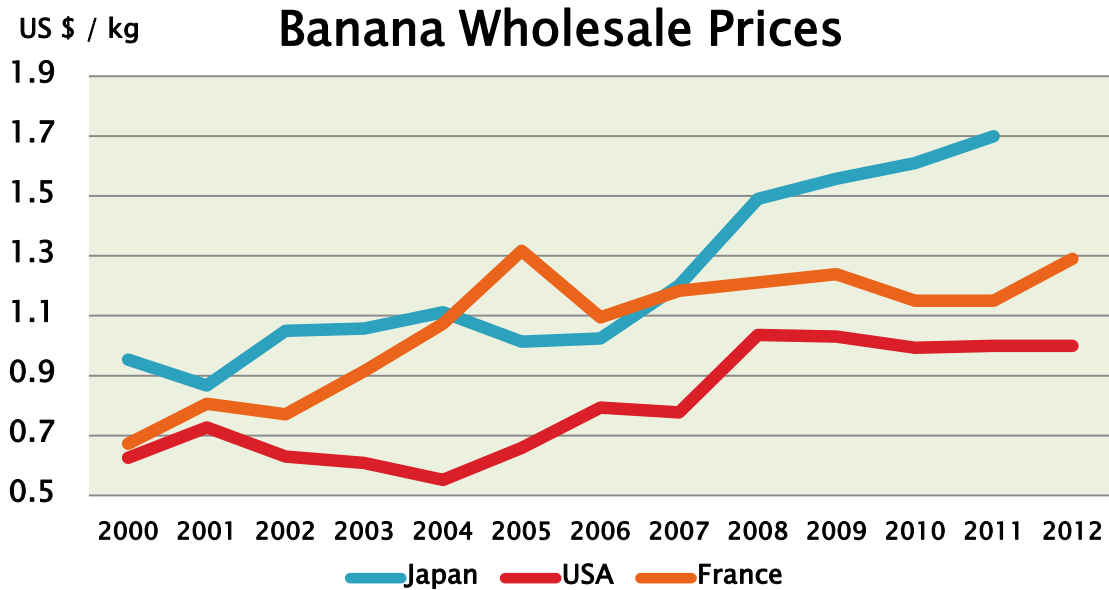
The prices are on the rise, especially on Japan's imports



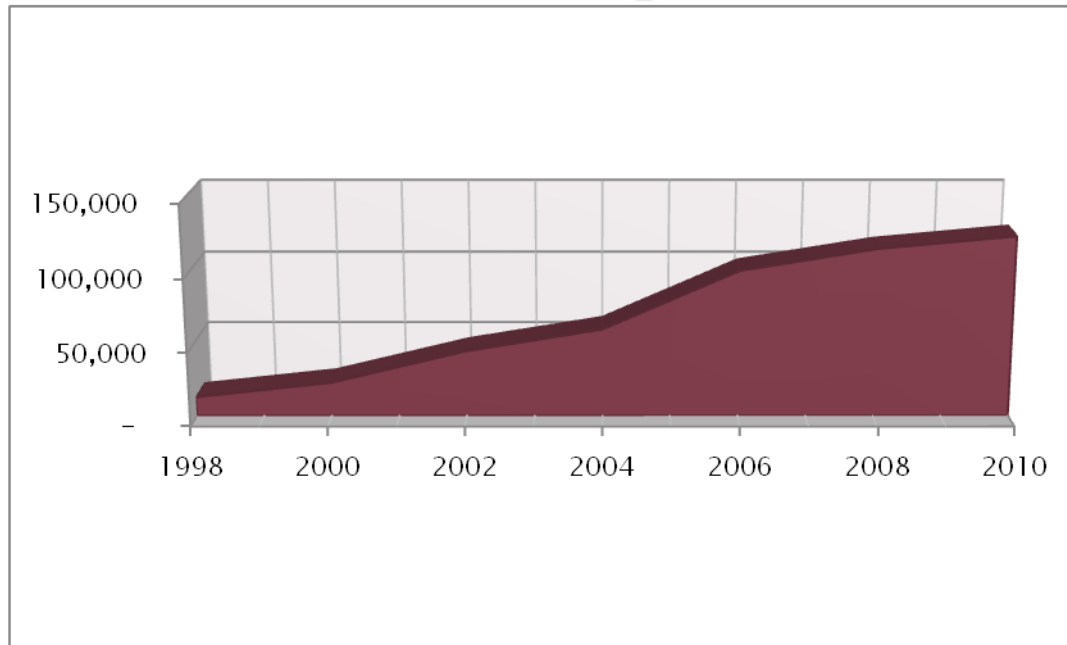
The import price in the EU increased by:

- 10.5% in 2011
- 8.1% in 2012



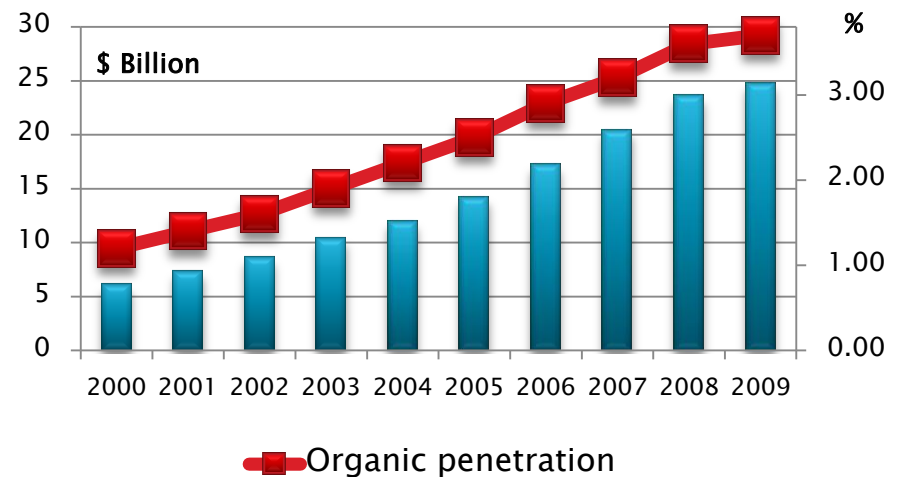


US market for organic bananas

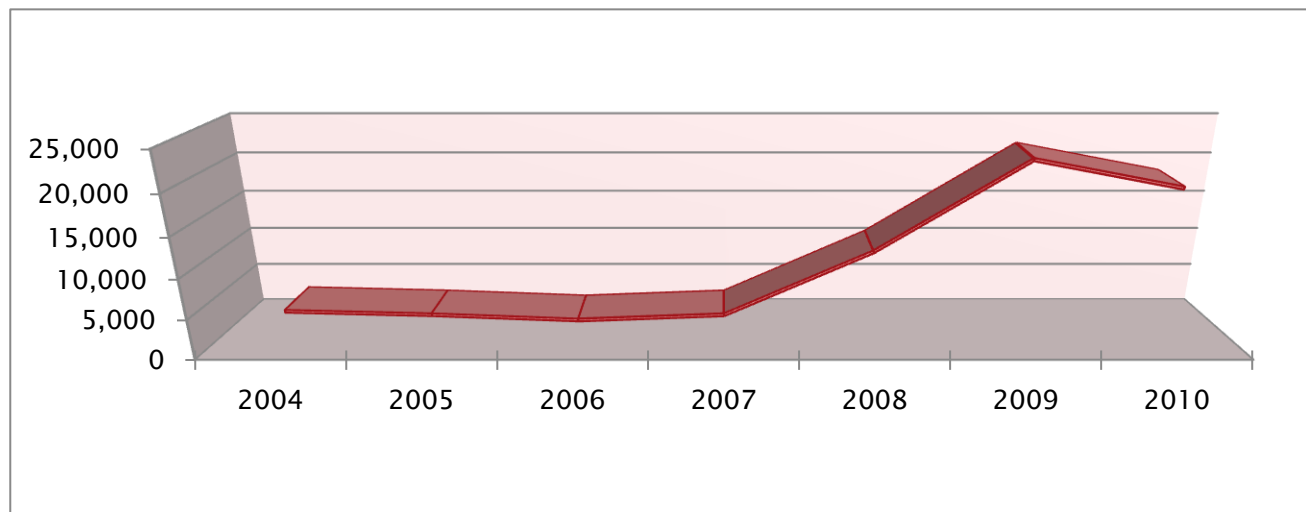


US imports of organic bananas, tonnes

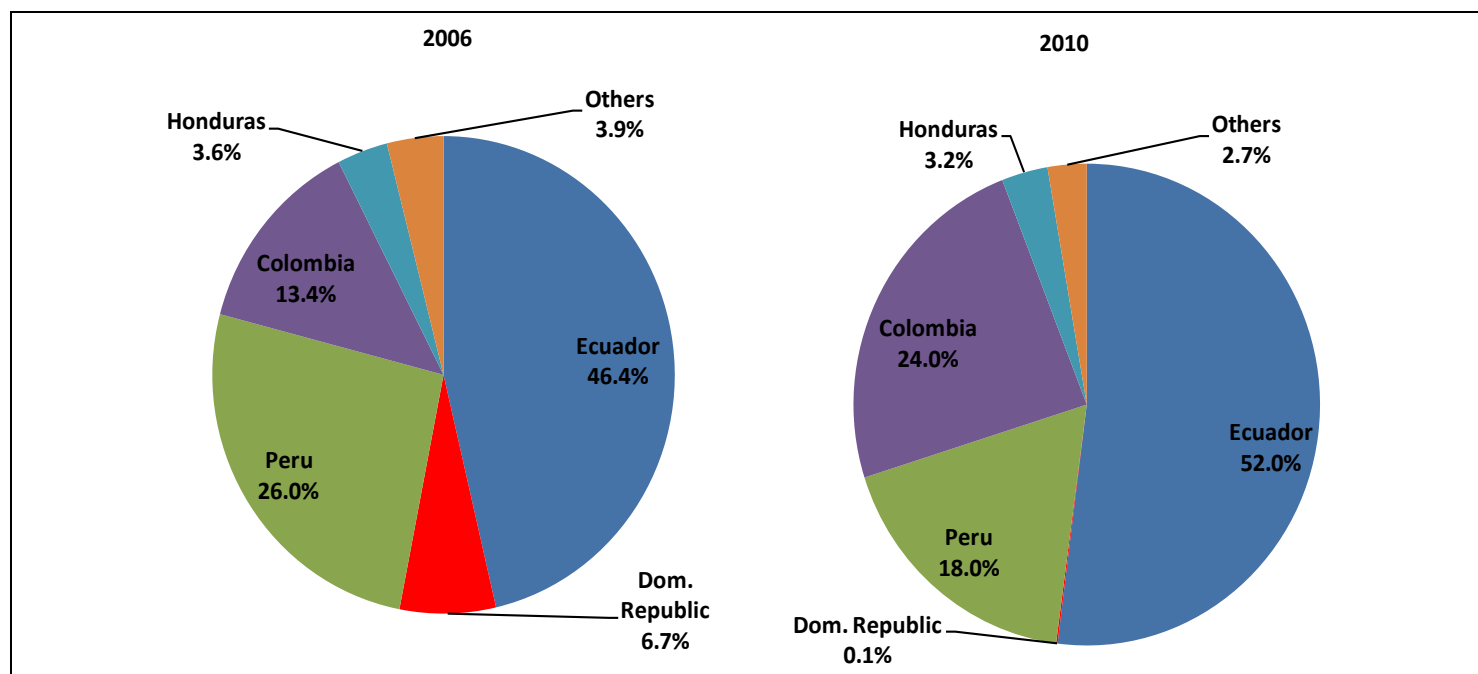
US sales and market penetration of organic food products



US imports of Fair-trade bananas, (tonnes)

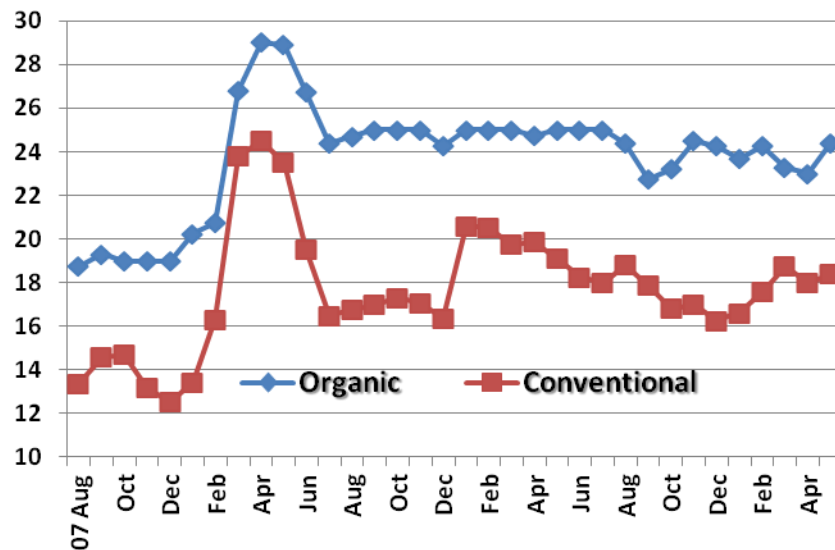


Comparision of market shares by main US organic banana suppliers

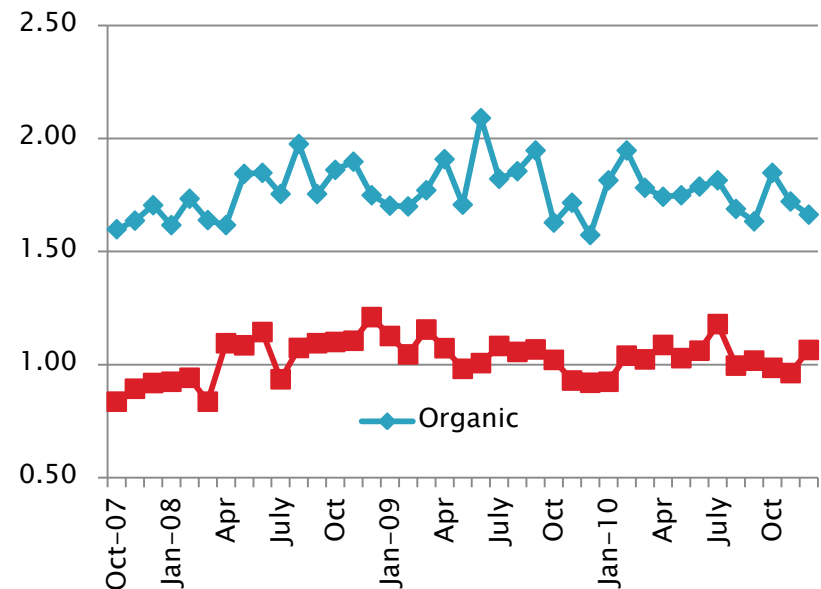


Prices and premiums of organic bananas

Average monthly wholesale prices for organic and conventional bananas in the New York market (USD/box)



Monthly retail prices for organic and conventional bananas (USD/kg)



Organic bananas imports in the EU

- ▶ Dominican Republic accounts for approximately half of total imports of organic bananas by the EU, down from 85% (problems with certification compliance)
- ▶ The rest is almost equally divided between Colombia, Ecuador and Peru.



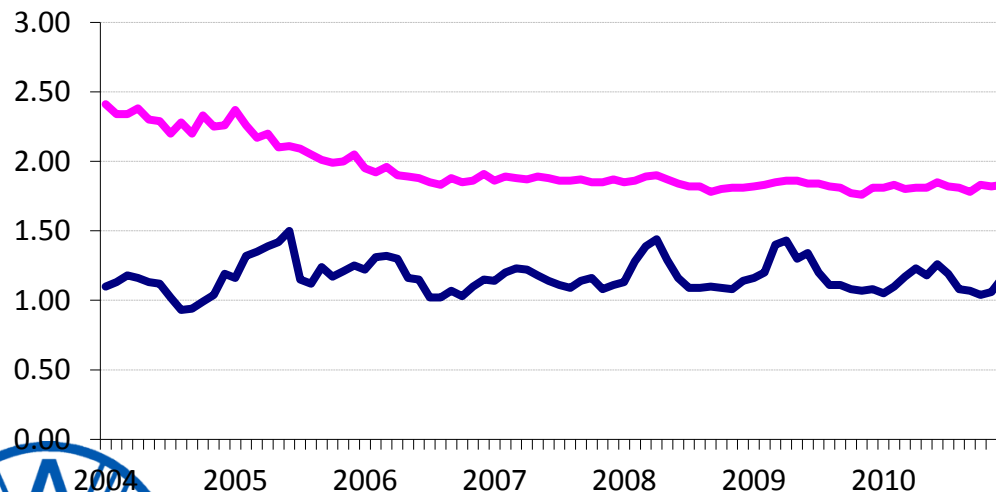
- ▶ The largest European markets for organic food and beverages are Germany, the United Kingdom, France and Italy (2 / 3 of total retail sales in Europe)
- ▶ The countries with the highest per capita spending on organic food and drinks are Denmark and Switzerland.



Share of organic bananas the total value of retail sales of bananas in Germany:

- 2004: 2.8%
- 2010: 14.8%

Retail prices for conventional and organic bananas in Germany (2004–2010; €/kg)



Retail prices for organic bananas in the United Kingdom (March 2011)

	Organic		Non-organic		Price premium
	Price (£/kg)	Origin	Price (£/kg)	Origin	
Tesco	£1.03	Dominican Republic	£0.77	n.d.	34 percent
Asda	£0.85	Dominican Republic	£0.77	Cameroon	10 percent

Source: www.mysupermarket.co.uk.

