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Note on methodology

Data and information in this market review were compiled from communications with national sources and industry partners in trading countries, monthly data from TDM and COMTRADE and secondary information and data from desk research.

Detailed tables on global trade in bananas as well as further information on data sources and any deviations from the underlying methodology can be found in the Banana Statistical Compendium 2019.

All data in this report should be considered as provisional.

Foreword

The Banana Market Review is issued on an annual basis to Members and Observers of the Sub-Group on Bananas of the Intergovernmental Group on Bananas and Tropical Fruits, which is a subsidiary body of the Committee on Commodity Problems (CCP).

It is prepared by the Team on Responsible Global Value Chains, Markets and Trade Division, Food and Agriculture Organization of the United Nations (FAO), Rome, and the tables contained bring together the information available to FAO, supplemented by data obtained from other sources in particular with regard to preliminary estimates.

The Team on Responsible Global Value Chains provides research and analyses on global value chains for agricultural commodities, and economic data and analyses on tropical fruits. Regular publications include market reviews, outlook appraisals and projections for bananas and tropical fruits. The team also provides assistance to developing countries in designing and implementing national policies regarding responsible value chains in agriculture.

The report is available at the following FAO website:
<http://www.fao.org/economic/est/est-commodities/bananas/en/>

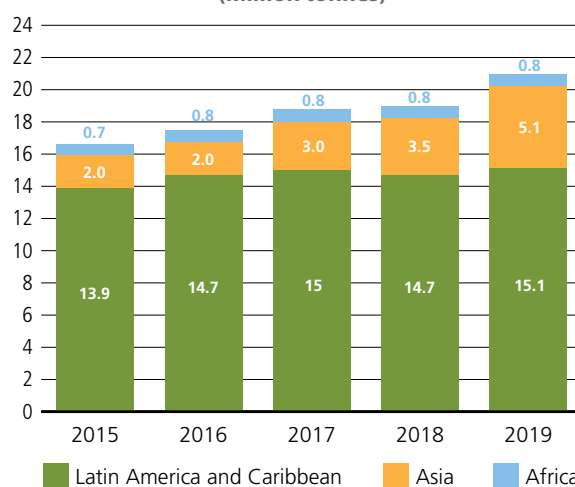
Developments in banana trade - results for 2019

Exports

Global exports of bananas, excluding plantain, reached a new record high of an estimated 21 million tonnes in 2019, an increase of 10.2 percent compared with 2018. Data for the full year indicate that strong supply growth in Ecuador and the Philippines, the two leading exporters, was again chiefly accountable for this rise. Fast expansion in exports was also recorded for Panama, which benefited from ample growth in supplies following the activation of a major banana production zone in the Baru district. Adverse weather conditions attributed to the El Niño weather phenomenon meanwhile continued to affect shipments from several other key suppliers, most severely those from Costa Rica and the Dominican Republic.

Exports from **Latin America and the Caribbean** increased by 3 percent in 2019, to 15.1 million tonnes, due to strong growth in shipments in several of the key exporters. Ecuador, which accounts for over 40 percent of exports from the region, registered a further 4.2 percent expansion in shipments and reached nearly 6.7 million tonnes. Although adverse weather conditions attributed to the El Niño weather phenomenon had hampered production during the first eight months of the year, the country increased its exports for the third consecutive year. Fast growth in demand from China and Turkey, two key emerging destinations for banana shipments from Ecuador, were mainly behind this rise. Compared with 2018, supplies from Ecuador to Turkey increased by 42 percent in 2019, while exports to China increased by 73 percent, to approximately 460 000 tonnes, thereby more than offsetting a near 4-percent decline in exports to the Russian Federation. Shipments from Ecuador also continued to benefit from the scheduled tariff reductions under the European Union (EU)-Andean agreements in 2019, which facilitated imports into the EU market at a reduced rate of EUR 83/tonne throughout the year and contributed to a reported 61 percent increase in exports to the Netherlands.

Figure 1
World banana exports by region, 2015-2019 (preliminary)
(million tonnes)



Exports from Guatemala, currently the second leading exporter in the region, increased by 1.5 percent in 2019, to approximately 2.4 million tonnes. Volume growth from Guatemala was supported by an approximate 3.3 percent decline in average unit values in 2019, as large supplies outstripped demand. On average, around 90 percent of Guatemalan bananas are destined for the United States, where they compete well against bananas from other origins due to their comparatively low unit prices at import level. As such, Guatemala remained the third leading exporter of bananas globally, behind Ecuador and the Philippines, at a near 12 percent volume share in 2019. Shipments from Colombia, currently the fourth largest supplier globally, grew by 8.4 percent to 1.9 million tonnes in 2019, equivalent to 9 percent of global volumes. Successful efforts to raise production through an expansion in planted area as well as technology-related productivity gains supported this growth. These also helped to counteract the damaging effects of heavy rains attributed to the El Niño weather phenomenon that affected Colombian banana production during the first eight months of the year. In addition, the discovery of the highly damaging Fusarium wilt Tropical Race 4 (TR4) pathogen on farms in Northern Colombia in July 2019 caused substantial concern throughout the industry, threatening to reduce profit margins on account of higher costs for prevention in the second half of the year (see section on TR4 below).

Weather-induced production shortages also resulted in a 19 percent drop in exports from Costa Rica, to approximately 1.4 million tonnes. Low temperatures, humidity and flooding, which had already afflicted Cost Rican banana plantations for several months in 2018, continued to reduce yields significantly. This in turn benefited banana exports from Panama, which reported shipments of 295 000 tonnes to Costa Rica in 2019. Overall, exports from Panama more than doubled in 2019, reaching 64 000 tonnes, as a result of higher supplies and a related 40-percent decline in export unit values.

Exports from the **Caribbean** declined to an estimated 114 000 tonnes in 2019 – a decrease of 10.9 percent compared with 2018. Severe weather-related disruptions to production in the Dominican Republic, which accounts for approximately 90 percent of exports from the region, continued to affect the overall export performance of the Caribbean. Banana production in the Dominican Republic has been dramatically affected by adverse weather conditions since 2017, when Hurricane Irma caused substantial damage to plantations. Critical conditions of drought and repeated tropical storms again resulted in substantial crop losses in 2019, leading to high domestic prices for bananas within the Dominican Republic and an estimated 9.8 percent decline in exports from the country. In light of the uncertain production situation, producers reportedly continued to be unable to secure export contracts and faced additional difficulties from higher input costs caused by elevated irrigation needs to alleviate drought conditions. The increasing frequency and magnitude of adverse weather events in the region provide considerable cause for concern, particularly for small exporters from the Windward Islands, whose competitive positioning in banana trade has been undermined by their inability to shield crops from natural disasters.

Asian exports continued to display a healthy recovery from the weather-induced production shortages that occurred between 2015 and 2017 and reached a peak of 5.1 million tonnes in 2019, representing an increase of 42 percent compared with 2018, when they stood at 3.5 million tonnes. The rise was primarily due to another year of strong production growth in the Philippines, where exports reached 4.4 million tonnes

in 2019, an estimated increase of 41 percent compared to the previous year and an unprecedented record.¹ Banana production in the Philippines had been affected by a series of adverse weather conditions as well as outbreaks of TR4 between 2015 and 2017, in response to which significant investments were made in area expansion, disease prevention, new technologies and improved inputs. The Philippines ranks as the largest exporter in the region, accounting for approximately 90 percent of total export volumes from Asia. Its two major markets continued to be China and Japan in 2019, which were reported to have absorbed around one third of Pilipino exports each in 2019. Following an increase in shipped volumes of 38 percent, China overtook Japan as the largest destination for bananas from the Philippines in 2019, procuring 1.6 million tonnes.² Thanks to the significant recovery in supplies in 2018 and 2019, the Philippines regained its place as second largest global exporter of bananas behind Ecuador, accounting for 23 percent of global shipments in 2019.

Africa's exports³ declined by an estimated 2.5 percent from the reported volumes in 2018, to approximately 790 000 tonnes, as a result of further significant disruptions to supplies from Cameroon. The country ranks as the second largest exporter in the region, but prolonged civil unrest continued to hinder production and export routes for the second year in a row in 2019. Consequently, shipments from Cameroon declined again, this time by nearly 20 percent, dropping to an estimated 167 000 tonnes, equivalent to 21 percent of exports from the region in 2019. Shipments from the leading exporter in the region, Côte d'Ivoire, rose by 3 percent in 2019 compared with 2018, to an overall export volume of 411 000 tonnes. The country had made significant investments into revitalizing its domestic banana production since 2017, with additional financial support from the European Union. Exports from Côte d'Ivoire primarily reach the European Union, most importantly France, where they benefited from the supply shortages from Cameroon in 2019.

1 Data reported by the Philippine Statistics Authority in June 2020.

2 Data reported by the Philippine Statistics Authority in June 2020.

3 For the purpose of this study, intra-African trade is excluded.

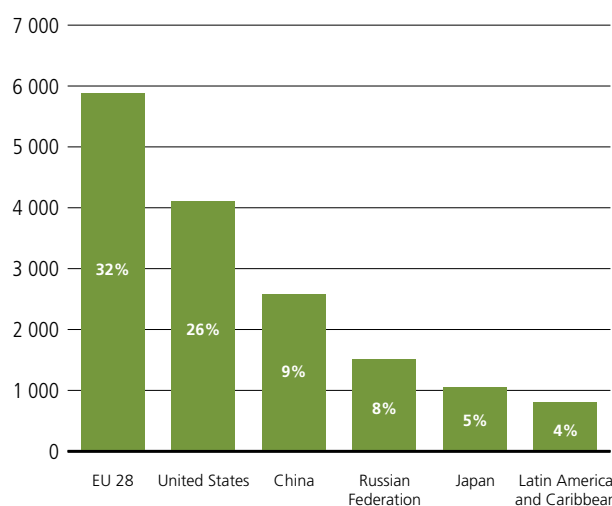
While shipments from Cameroon to France declined by 69 percent in 2019, exports from Côte d'Ivoire registered a 37 percent increase, to a reported volume of 243 000 tonnes.

Imports

Global net import volumes of bananas reached 19.4 million tonnes in 2019, an estimated increase of 6.5 percent compared with 2018. Data for the full year indicate a contraction of 1.3 percent and 2.6 percent in the two largest net importers, the European Union and the United States, respectively. Conditions of supply outstripping demand continued to suppress prices significantly in both markets in 2019, particularly during the summer months, when competition from temperate fruits was strong in both the United States and the European Union. This continued to cause substantial concern to African, Caribbean and Pacific (ACP) exporters and European producers, who tend to have difficulty to compete on prices. While these two groups are not homogenous and costs vary broadly across countries within each group, ACP producers are generally faced with higher production costs arising from less favourable land and infrastructure conditions, small farm sizes and a high exposure to natural disasters.

Figure 2

Distribution of global imports by market, 2019
(thousand tonnes and share in global imports)



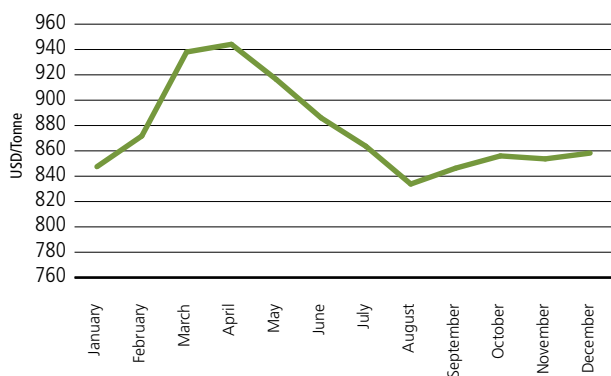
Net imports by the **European Union (EU)**, the largest global importer, declined slightly to 5.9 million tonnes in 2019, from their unprecedented peak of 6 million tonnes in 2018. The major importing countries within the EU, in particular Germany, the United Kingdom and Italy, reported lower import and consumption levels on account of strong competition from temperate fruits during the unusually long and warm summer season. Imports by France and Spain faced additional competition from higher domestic supplies from the French West Indies and the Canaries, respectively. Monthly developments of indicative EU import values of bananas closely reflected the overall supply and demand situation. Early in the year, a shortage in export supplies resulted in EU import unit values reaching a peak of USD 944 per tonne in April 2019. During the summer months, abundant export supplies, coupled with the above-mentioned decline in demand, resulted in a significant drop in prices, with EU import unit values reaching a trough of USD 834 in August 2019. Overall, average EU import prices in US dollar terms stood 7.5 percent lower in 2019 than in 2018. In terms of imports by origin, three of the main exporting countries situated in Latin America – Ecuador, Colombia and Costa Rica – continued to dominate the market, providing some 70 percent of all EU imports. While shipments from all three exporters benefited from further scheduled tariff reductions in 2019 (see section on market access to the EU below), they nevertheless registered stagnating or declining volumes compared to the previous year as a result of the reduced EU import demand.

European banana production reached 624 425 tonnes in 2019, approximately 5 percent above the level reached in 2018.⁴ This was primarily due to further output increases reported for Guadeloupe and Martinique, the main suppliers of bananas to France, which together accounted for almost one third of European banana production in 2019. Following the severely destructive tropical storms that hit the Caribbean in the fall of 2017, Martinique and Guadeloupe, the two French West Indies suppliers, had suffered a near complete loss of banana crops, which continued to affect their production capacity in 2018. Despite the partial recovery in Martinique,

⁴ Data provided by the European Commission in May 2020.

Figure 3

European Union Import Unit Values 2019



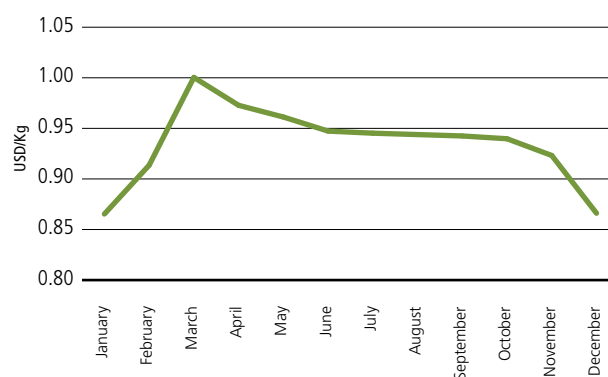
production remained well below the average of 190 000 tonnes registered from 2014 to 2016, at a reported 154 383 tonnes in 2019. Production in Guadeloupe meanwhile increased to a reported 43 215 tonnes in 2019, but similarly remained below the average of approximately 48 000 tonnes registered from 2014–2016. In response to the improved supply situation from the French West Indies, and in view of higher competition from temperate fruits during the warm summer months, France reduced its imports of bananas from third country suppliers in 2019. Over the course of 2019, France acquired approximately 672 000 tonnes from global markets, a 7.5 percent decrease compared with the same period in 2018.

Net imports into the **United States** (US) fell to 4.1 million tonnes in 2019, equivalent of an approximate global volume share of 21 percent. As such, the US continued to rank as the second largest banana importer globally in 2019. Adverse weather in some of the major exporters to the US – most notably in Costa Rica – resulted in continued difficulties in obtaining supplies. Overall, Guatemala accounted for some 41 percent of supplies to the US in 2019, while Costa Rica and Ecuador provided approximately 17 percent and 14 percent of volumes, respectively, making disruptions to shipments from these exporters particularly critical. However, in addition to the shortages in supply, import demand in the US remained subdued from April 2019 onwards, more than offsetting the effects of lower imports on prices. Similarly to the situation observed in the EU, this

was mostly on account of a shift in consumer demand towards summer fruits. US wholesale prices closely reflected the overall market situation, reaching a peak of USD 1 per kilogram in March 2019 and declining continuously thereafter to USD 0.86 per kilogram in December 2019. On average, US wholesale prices stood 1.6 percent lower throughout the year than in 2018.

Figure 4

**Monthly Wholesale Prices 2019
United States of America**



Imports by **China** reached nearly 2.6 million tonnes, following a significant expansion of 59 percent from 2018. Chinese import demand for bananas continued to be driven by disruptions to domestic production caused by adverse weather and diseases, as well as fast income growth and associated changes in consumer preferences. As such, China expanded its volume share to an estimated 13 percent of global net imports, overtaking the Russian Federation as the third largest importer of bananas globally. Similarly to Japan, China procures the majority of its bananas from the Philippines, and benefited from higher Pilipino supplies in 2019 following the recovery of production. Data for the full year further suggest that China increased imports from Ecuador by 91 percent, to approximately 459 200 tonnes, and doubled imports from Viet Nam, to roughly 277 600 tonnes in 2019.

Imports by the **Russian Federation** declined by 2.8 percent in 2019, to 1.5 million tonnes. Previously the third largest banana importer globally behind the EU and the US, the Russian Federation accordingly

moved to fourth place, accounting for 8 percent of total global net imports in 2019. Banana imports by the Russian Federation had witnessed significant increases in 2016 and 2017, aided by a stronger currency, rising incomes and changing consumer preferences. In view of the rouble's renewed loss of purchasing power, banana imports by the Russian Federation began to slow down in 2018, and were additionally hampered by competition from abundantly and cheaply available temperate fruits in 2019. Approximately 97 percent of banana imports into the Russian Federation originated in Ecuador in 2019.

Banana imports by **Japan** slightly exceeded 1 million tonnes following growth of 4.2 percent in 2019. In light of an increasing popularity of bananas among Japanese consumers, import growth in Japan continued to benefit from the production recovery in the Philippines, traditionally the largest supplier to Japan. The country additionally imported larger volumes of bananas from origins in Latin America, most notably from Ecuador and Mexico, whose unit prices ranged on average 10 and 4 percent lower than those of the Philippines in 2019.

Market access to the European Union

Market access for bananas to the European Union is regulated by the terms and conditions of the Geneva Agreement on Trade in Bananas, which was negotiated between the European Union and Latin American banana producers in December 2009 and entered into force on 1 May 2012. By this agreement, the European Union committed to a gradual reduction of the Most Favoured Nations (MFN) tariff in eight steps, from the previous level of EUR 176/tonne to EUR 114/tonne in 2019 at the latest. Accordingly, the MFN tariff stood at EUR 114/tonne in 2019.

A number of bilateral trade agreements concluded between the European Union and Latin American banana producing countries in 2013 ensure preferential tariff duties on most of the imports from this region. Bananas imported from Central America (except for Belize), Colombia and Peru paid a reduced rate of 82 EUR/tonne in 2019 under the Central America Agreement and the European

Union-Andean agreements. This tariff was reduced to EUR 75/tonne on 1 January 2020. The ACP banana suppliers benefit from duty- and quota-free access to the European Union market under the Economic Partnership Agreement (EPA), which came into effect on 1 January 2008.⁵ The most significant development in trade policy in recent years was the accession of Ecuador to the European Union-Andean agreements, with effect from 1 January 2017. Under this provision, the tariff on banana imports from Ecuador, previously the only major supplier paying the MFN tariff, stood at a rate of EUR 83/tonne in 2019, i.e. one euro above the rate paid by its main competitors Costa Rica and Colombia. This preferential tariff was reduced to its final level under the current agreement, EUR 76/tonne, on 1 January 2020, maintaining the one euro difference with the rate paid by other Andean and Central American suppliers.

To alleviate concerns by European Union producers, who fear that excess supply from Ecuador and other Latin American suppliers might harm demand for European Union bananas, the European Commission has adopted a safeguard clause that limits the preferential access of the nine Latin American suppliers to certain agreed annual thresholds. In 2019, this threshold was set at 1 957 500 metric tonnes for Ecuador, well above the country's total exports to the European Union of 1 463 067 metric tonnes reported in the same year. The annual import thresholds are revised upwards on a yearly basis.

Data reported by the European Commission show that three Latin American exporters exceeded the import volumes agreed in the respective bilateral trade agreements in 2019. According to these data, volumes from Nicaragua reached 74 366 tonnes or 513 percent of the agreed level in 2019, while volumes from Guatemala reached 199 779 tonnes or 276 percent of the agreed levels. Imports from Peru, meanwhile, reached 109 278 tonnes or 108 percent of the agreed level, thereby slightly exceeding the trigger level. Given the relatively small share of bananas imported into the European Union from these producers when compared

⁵ All current banana suppliers in the ACP have concluded negotiations on either a full or interim EPA: Belize, Cameroon, Côte d'Ivoire, Dominica, Dominican Republic, Ghana, Grenada, Jamaica, Saint Lucia, Saint Vincent and the Grenadines, and Suriname.

Table 1: European Union’s preferential tariff reduction schedules under the banana agreements

Year	MFN	ACP	Central America and Andean countries*	Ecuador
2010	148	0	148	148
2011	143	0	143	143
2012	136	0	136	136
2013	132	0	124	132
2014	132	0	117	132
2015	132	0	110	132
2016	127	0	103	127
2017	122	0	96	97
2018	117	0	89	90
2019	114	0	82	83
2020	114	0	75	76
2021	114	0	75	76
2022	114	0	75	76

Source: WTO Tariff Database.
* except Ecuador

to their main competitors, Colombia, Ecuador and Costa Rica, the impact on prices and on the overall stability of the European banana market remained negligible. Considering this, the European Commission decided against the temporary suspension of the tariff preferences foreseen in the stabilization mechanism agreements, thereby raising the concerns of both ACP exporters and European Union producers.

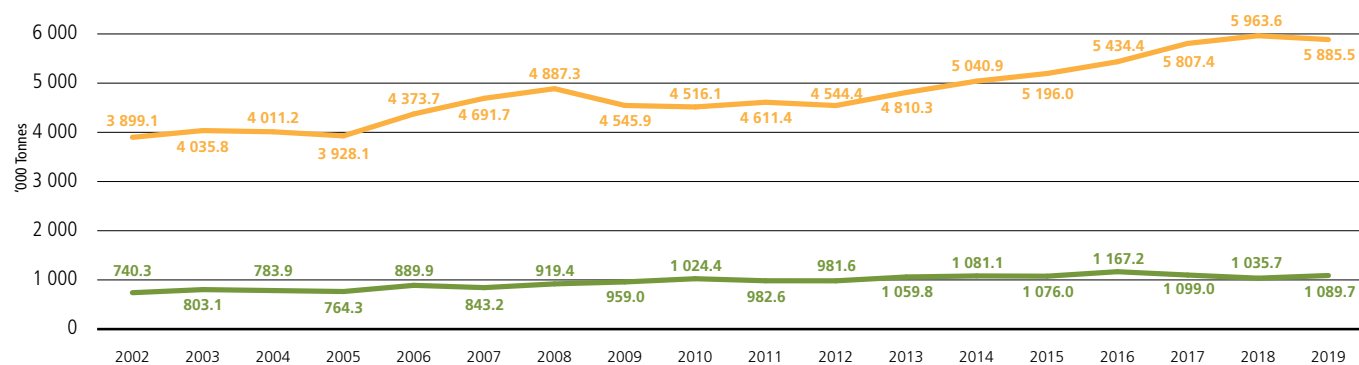
Annual data from the European Union show a distinct increase in total banana imports following the implementation of the Geneva Agreement on Trade in Bananas in 2012 and the conclusion of the bilateral trade agreements with Andean and Central American banana producers in 2013 (Figure 5). Between 2012 and 2019, total European Union imports of banana grew at an average annual rate of 4 percent, while imports originating in ACP producing countries experienced an average annual growth of only 0.9 percent. This compares with average annual growth of 4.1 percent for imports from ACP suppliers for the period of 2004 to 2011, when total European Union imports expanded on average by only 2.2 percent per annum. Further, following Ecuador’s accession to the European Union-Andean agreements on 1 January 2017, European Union banana imports from ACP suppliers displayed declines in 2017 and 2018 and also remained below their 2016 peak in 2019. Compared to the three-year average

of 2014-2016, volumes from ACP producers stood 2 percent lower in 2019, while aggregate volumes from Central American and Andean suppliers stood 16 percent higher (Table 2). However, it should be noted that the scheduled tariff reductions may not be the only reason for the observed slowdown in exports from ACP suppliers, since these have been additionally curtailed by adverse climatic and other events such as the strong hurricanes experienced in the Caribbean in 2017. Both European Union and ACP producers, particularly those located in the smaller Caribbean ACP countries, notoriously face difficulty to compete in both the global and European Union banana markets. Less favorable land conditions, small farm sizes, difficult transport networks and the exposure to natural disasters result in high production costs, which in some cases such as Saint Vincent and the Grenadines are reported to be a multiple of the production costs in the most efficient Latin American countries.

Table 2: European Union's Imports

Evolution of European Union imports	2014-2016 <i>'000 tonnes</i>	2019 <i>'000 tonnes</i>	Difference <i>percent %</i>
Total European Union Imports	5 224.4	5 885.5	13%
European Union imports from ACP suppliers	1 108.1	1 089.7	-2%
European Union imports from Central American and Andean suppliers	4 000.5	4 645.8	16%
Ecuador	1 380.7	1 482.4	7%
Colombia	1 230.3	1 406.1	14%
Costa Rica	1 005.0	1 159.1	15%
Panama	210.8	285.9	36%
Peru	104.8	110.7	6%
Guatemala	68.9	201.6	193%

Figure 5
EU Banana Imports



Recent challenges to banana trade

The example of the Fusarium wilt disease of banana

Banana Fusarium Wilt disease, which has been affecting banana plantations in several growing regions since the late 19th century, continues to be of serious concern to the global banana industry.⁶ The current strain of the disease, described as Tropical Race 4 (TR4), poses particularly elevated risks to global banana supplies as it can affect a much broader variety of banana and plantain cultivars than previous strains of Fusarium wilt.⁷ In addition, there is currently no effective fungicide or other eradication method that is capable of eliminating TR4. In affected plants, the disease can quickly cause a total yield loss. According to official information, TR4 is currently confirmed in 17 countries, predominantly in South and Southeast Asia.⁸ Due to the longevity of the fungus in the soil, infected land becomes unavailable for banana or any other cultivation for decades, resulting in a shift of production to new, unaffected land as the only recourse. Depending on the severity of the spread, outbreaks can result in an increasing scarcity of pathogen-free soils. In all reported cases, once a piece of farmland has been contaminated, managing the disease has proved extremely challenging and costly. This poses a particular threat to the livelihoods of smallholder banana producers in affected regions, who often lack the financial means to sustain operations in the face of simultaneous yield losses and increased production costs. In this regard, prevention, rapid containment and quarantine are particularly important.

In July 2019, the fungus was detected for the first time on banana plantations in Latin America, in the northeastern region of La Guajira, Colombia. According to official information, 175 hectares of banana farms have been put under quarantine by the Instituto Colombiano Agropecuario (ICA). The discovery of Fusarium wilt TR4 in the world's most significant net

exporting region, Latin America and the Caribbean, as well as its enduring occurrence in Asia, has caused considerable alarm in the banana export industry. Given the current annual value of production for export and the importance of Cavendish bananas for smallholders in the region, TR4 threatens to cause substantial losses to the sector. To date, few estimates of the additional disease-related expenses to producers are available, but it is clear that Latin American producers and exporters will be faced with significantly higher costs to shield their production from TR4. Key exporters from the region, including Ecuador, Costa Rica, Peru and Panama, have started to draw up national prevention and containment strategies, such as fumigation and sterilization of vehicles at border crossings, and the application of organic measures to neutralize the fungus. The formation of a regional, and potentially global, TR4 initiative was additionally requested by Costa Rica's National Banana Corporation (Corbana) in November 2019, alongside a request for a doubling of the funds dedicated to disease research.⁹ FAO and the World Banana Forum have furthermore established a Global Network on TR4¹⁰ aimed at facilitating global collaboration to complement the work of the Forum's Task Force on TR4, as well as a regional Technical Cooperation Project to help countries in Latin America and the Caribbean fight the spread of Fusarium wilt. Strengthened international collaboration, particularly with regards to enhanced data collection, information sharing and capacity development, can support improved awareness, prevention and containment of Fusarium wilt TR4 and be conducive to more resilient global banana production systems.

9 Freshplaza, <https://www.freshplaza.com/article/9166454/south-american-banana-producers-want-to-create-a-common-front-to-fight-the-fusarium/>

10 Available at www.fao.org/tr4gn and www.fao.org/wbf

6 An assessment of the potential economic impact of the TR4 disease was published in the November 2019 edition of the FAO Food Outlook, pp. 13-20, accessible here: <http://www.fao.org/3/CA6911EN/CA6911EN.pdf>

7 Ploetz (2005)

8 FAO (2019)



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