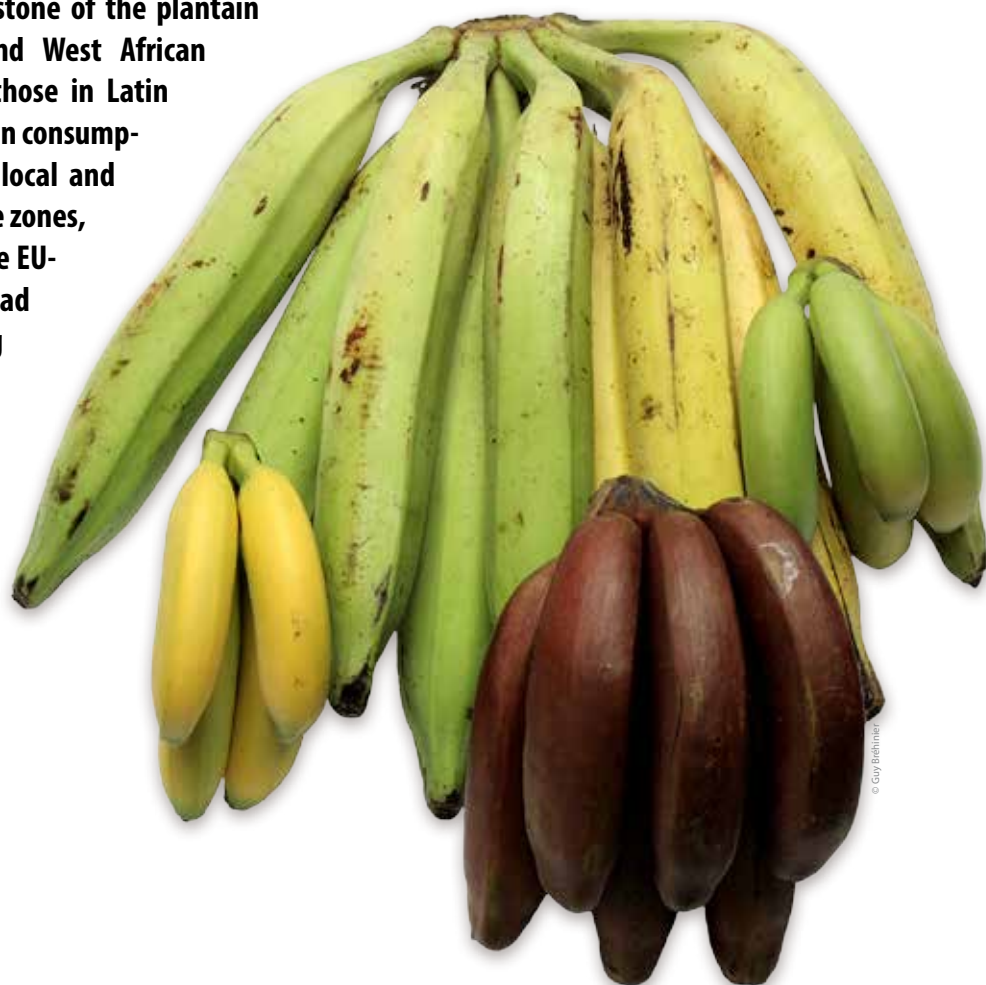


Plantain banana market

Self-consumption predominant on this still non-globalised market

Despite world production reaching approximately 20 million tonnes, international trade remains extremely limited, involving just 5 % of production, i.e. probably 750 000 t. Self-consumption remains the cornerstone of the plantain market: the Central and West African production areas, plus those in Latin America, are also the main consumption zones. Besides the local and regional markets in these zones, the United States and the EU-28 (the former well ahead of the latter) are driving international trade, mainly meeting the demand from populations of Latin American or African ethnic origin.



© Guy Brehmer

World production mainly aimed at self-consumption

The discreet presence of the plantain banana on European supermarket shelves and in world trade might imply that world production is limited; yet it is nothing of the sort! With approximately 20 million tonnes produced in 2016, the plantain banana, cultivated mainly in Central and West Africa, and also in Latin America, represents nearly 15 % of world banana production (dessert + cooking). Production of this cooking banana, hard to estimate due to the vast number of small producers, is rising by just 1 to 2 % per year, steadily but very slowly. Hence in the space of ten years, world production has increased by just 8 %, mainly in Central and West Africa (4 %), and also in South America (5 %). A big rise has also been seen in India, promoting Asia to the world number three production region spot, still far behind the other two.

Plantain – Top 10 producer countries

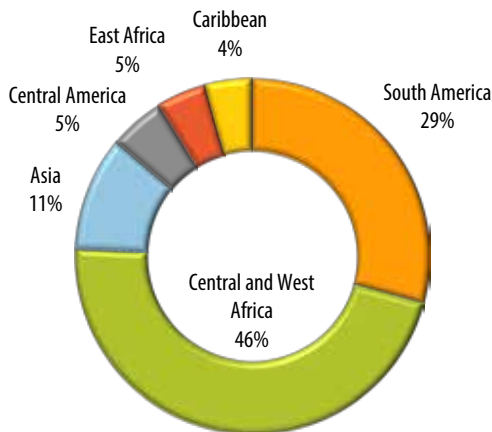
in tonnes	2016
Colombia	2 700 000
Nigeria	2 580 000
Ghana	1 980 000
India	1 900 000
Cameroon	1 700 000
Côte d'Ivoire	1 589 643
Peru	1 391 339
Ecuador	570 413
Brazil	560 000
Venezuela	557 146

Source: FAO 2016



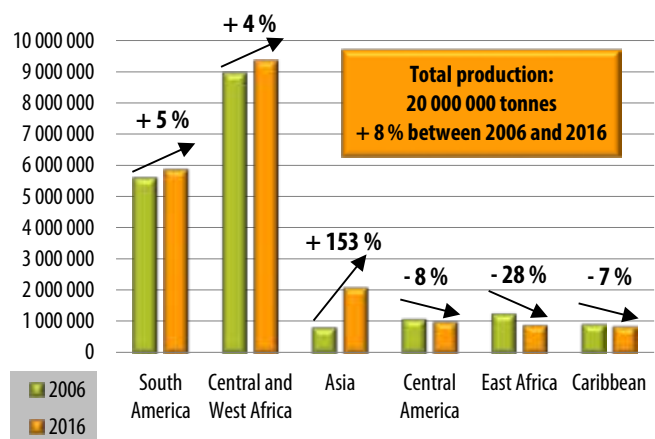
Plantain - Breakdown of world production

(sources : FAO 2016, CIRAD)



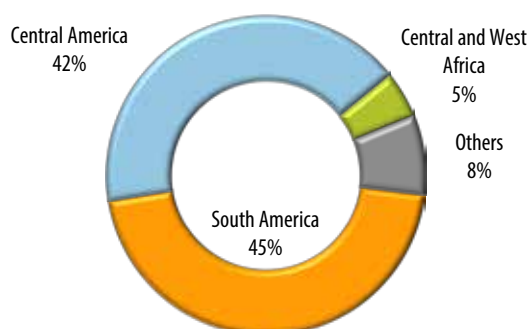
Plantain - Evolution of production between 2006 and 2016

by producer region (in tonnes / sources: FAO, CIRAD)

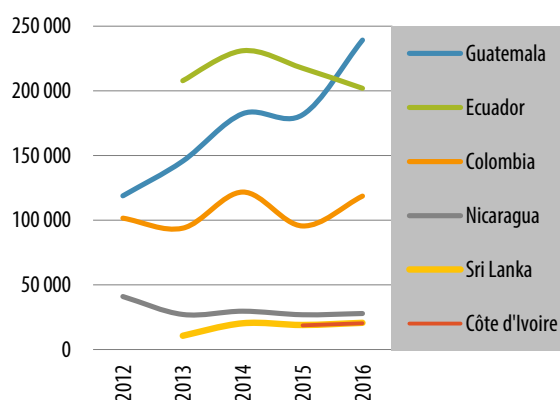


Plantain - Breakdown of world exports

(source: Comtrade 2016)

**Plantain - Evolution of main exporter countries**

(in tonnes / source: Comtrade)

**Central and West Africa: big production**

While Central and West Africa is the leading production region, representing 46 % of world production in 2016, export volumes remain highly limited. This paradox can be explained above all by the highly dynamic local demand, with plantain a staple for these populations. Hence there is a big shortfall between supply and demand in the sub-region, maintaining an attractive price level on these markets. In addition, the industry is under-organised in terms of export, while the production model is still for the most part traditional, comprising almost exclusively small producers using a wide range of varietal types because of the diversity of culinary uses and the large number of ethnic groups. It is difficult to determine the proportion of varieties belonging to one of the two main types of plantain: "French" (abundant hands, fruits bananas) and "Corne" (some hands, big fruits). Hence given the Latin American competition, Central and West Africa are outmatched (high cost) and are restricted to intra-regional trade, still lucrative and with high demand. By way of example, we can mention Cameroonian exports to Equatorial Guinea, Gabon and also the Central African Republic, Chad and Nigeria; or trade from Côte d'Ivoire to Liberia, Mali and Burkina Faso.

Latin America, more focused on exports

It is in Latin America (South and Central America), where the multinational Chiquita has developed plantain banana exports and set the standards, that we need to look for the big exporters. While this zone represents just 34 % of world production (29 % in South America and 5 % in Central America), it is responsible for 87 % of world exports. While local and regional demand is dynamic, as in Central and West Africa, exports growth has been driven by export purchasers. There are two coexisting production models: traditional small producers, some of whose production is still aimed at the local and regional markets, and medium-sized plantations, which have adopted more intensive models, driven by export purchasers.

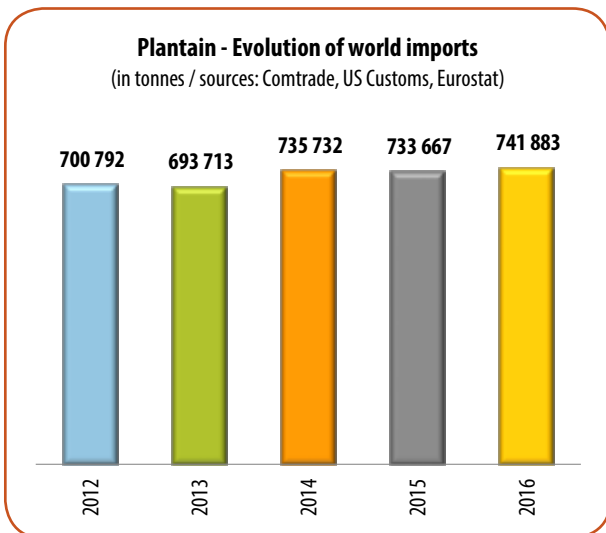
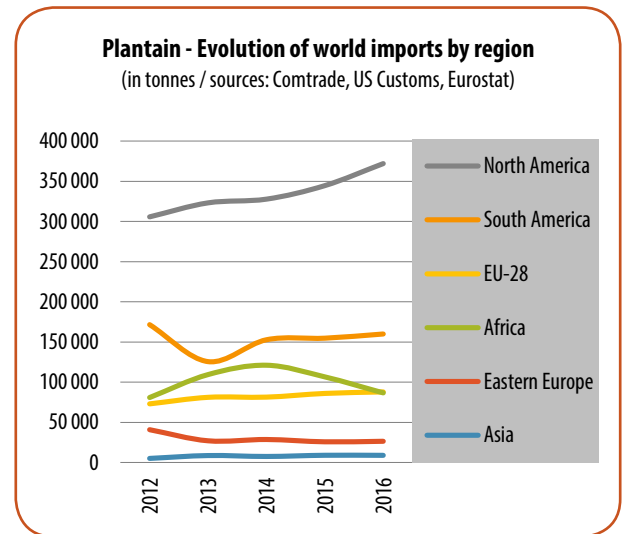
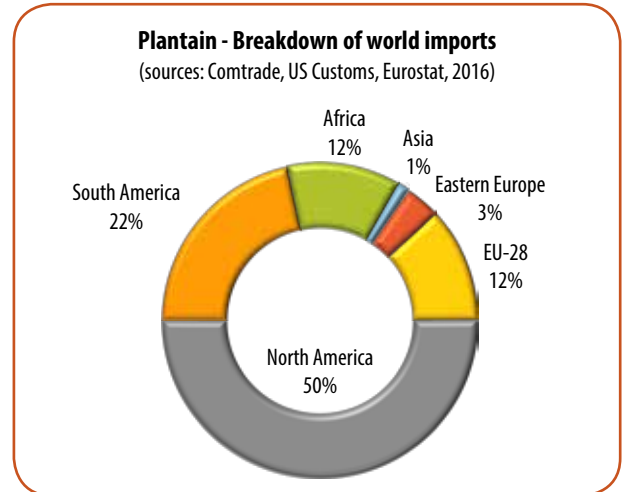
Unlike with large-scale Cavendish production, the multinationals have refrained from direct involvement in plantain production, which represents too risky an investment (diseases, yield, theft, etc.). However, they have imposed strict technical procedures and qual-



ity controls to meet the requirements of exporting to the Northern Hemisphere. This production is mainly based in Ecuador (main zone "El Carmen" to the north of Guayaquil), in Colombia ("Uraba" export banana zone), in Guatemala (new big exporter), but also in Nicaragua, Mexico and Costa Rica. Whether the production is traditional or intensive, the predominant variety type is "Corne", and more particularly the "Fake-Corne" largely preferred by Latin Americans, earning them numerous names in local dialects ("Baraganete" in Ecuador, "Harton" in Colombia, "Currare" in Costa Rica, and "Cuerno" or "Macho" in other Latin American countries).

World demand still meagre

Overall, production remains aimed at self-consumption, a powerful force in the production areas, relegating world trade to a limited secondary role, accounting for just 4 % of world production. Since 2012, world trade, estimated at 700 000 to 750 000 tonnes, has maintained a relatively stable level. It is hard to estimate world imports because of the uncertainty prevailing over possible customs declaration errors (similar customs codes for the banana/plantain banana). Here, we have opted to exclude the Middle East, despite the data available (approximately 950 000 tonnes in 2016), given the dietary habits of the populations and the data of countries exporting to this region. Besides the intra-regional trade in Africa and South America, which nonetheless represented 25 % of world trade in 2016 (i.e. 247 000 t), it is North America (especially the United States) that is registering solid figures, with 50 % of world imports in 2016, i.e. 370 000 tonnes. The European Union remains far behind, with just 12 % in 2016, i.e. 88 000 t.



USA, the number one and driving force behind world trade

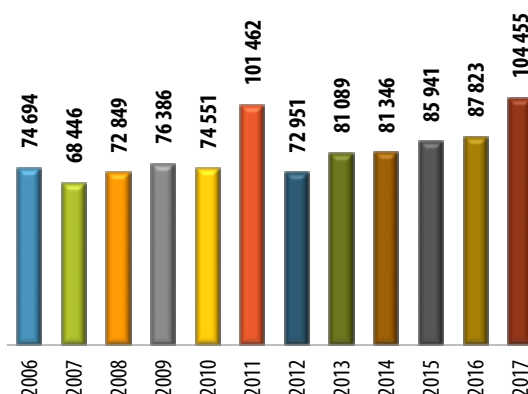
With estimated imports of 380 000 t (33 % of the world market) and a steady rise of 5 to 8 % per year between 2012 and 2017, the USA is the driving force behind international trade. Since re-exports are minimal (between 15 000 and 18 000 tonnes to Canada according to US Customs), it would very much seem that it is US consumption which is rising, albeit slowly but surely. The size of the US plantain banana market should, of course, be put into context compared to the Cavendish banana (more than 4.5 million tonnes) or other tropical fruits such as the pineapple (more than one million tonnes). The plantain is not yet a familiar product for all consumers. So it would seem that consumption and therefore the rise in imports are extremely closely linked to dietary habits of ethnic populations.

The supply to the US market comes solely from Latin America. Since 2016, Guatemala has been the market leader (+ 100 000 tonnes in 5 years), to the detriment of Ecuador. This shift in market share is in some ways reminiscent of the Cavendish banana, with Guatemala in this case too asserting its competitiveness. The boom in volumes from this origin is doubtless due to its favourable strategic position in relation to the US market (logistics facilitated by geographic proximity, low freight costs and competitive production costs). In second position, Ecuador seems to have suffered from the Guatemalan boom, with a downward trend since 2015 and volumes barely reaching 110 000 tonnes in 2017. Though trailing far behind, Colombia is holding up with stable exports of 60 000 to 70 000 tonnes. Mexico and Nicaragua are bringing up the rear, with respective rises of approximately 10 000 t and 8 000 t in the space of five years.

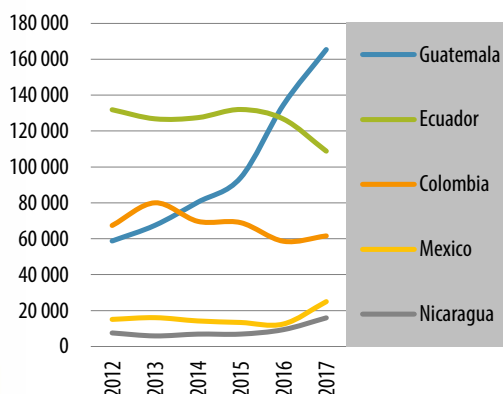
EU-28 market still just as limited, apparently...

After several years of near-stability, European Union imports reportedly exceeded the 100 000-t mark in 2017. It is legitimate to doubt this astonishing rise, bearing in mind that the lack of distinction between banana and plantain on Customs declarations could still be responsible. In 2016, a volume of 131 000 t had been declared, before being revised downward to approximately 88 000 tonnes (see **FruiTrop** 248, April 2017, p. 58). Regarding the various EU-28 members, customs declaration errors have apparently put countries such as Romania, Poland and Hungary among the biggest importers and consumers. So we should remain cautious with regard to customs figures, and above all bear in mind an approximate European market size of 80 000 t to 90 000 t. With

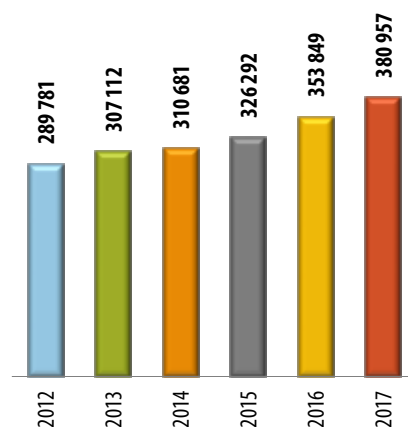
Plantain - EU-28 - Evolution of imports
(in tonnes / source: Eurostat)



Plantain - USA - Evolution of imports by main supplier countries
(in tonnes / source: US Customs)



Plantain - USA - Evolution of imports
(in tonnes / source: US Customs)



this level of plantain imports, Europe pales on the international market in comparison to the USA (more than 350 000 t). The list of the main importers includes more credible members such as the United Kingdom, the Netherlands, Belgium, Spain, France and also Italy, which re-export to other member countries. Hence European consumption per capita was just 0.17 kg on average, and as in the USA the regular demand comes mainly from ethnic populations.

The supply to the European market comes primarily from Latin America because of its production model (as set out above). While keeping a critical eye on customs figures, indisputably Colombia and Ecuador are by far the leading supplier countries, disputing first place. However, there remains a doubt over the exact value of imports, and the recent rise from Colombia. Far behind, Costa

Rica, long in the top three, has been driven out by the emergence of Guatemala. Finally, despite their special links with the European market (historical and geographic proximity), Central and West Africa have only a very small presence: the number one African country, Uganda, occupies a very distant fourth place.

Has the plantain a chance of seeing success?

Outside of the big production zones, the plantain banana remains a niche market with limited rises, especially in the European Union where its consumption remains restricted to ethnic populations, due to lack of knowledge of its uses and recognition of this “fruit-cum-vegetable”. Yet the plantain banana is all in all comparable to the sweet potato, which has seen renewed interest from consumers. Like the sweet potato, the plantain banana is exotic, featuring a slightly sweet taste, and has the advantage of an affordable price (wholesale price in France around 0.90-0.95 euro/kg, and according to IRI/Fresh Look Marketing, retail prices around 0.60-0.65 USD/kg in the USA). Hence, why could the plantain banana not see the same boom as the sweet potato, reaching a wider public? ■

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Photos © Thierry Lescot

