

Banana Market in China

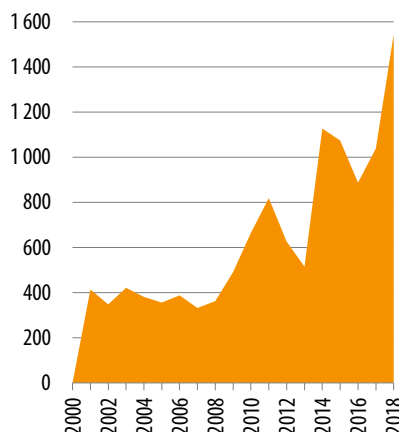
Getting off the ground

by Denis Loeillet, CIRAD
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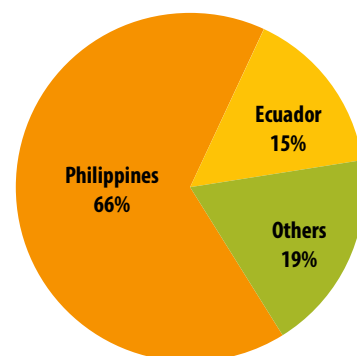


Having been universally expected to awaken in terms of banana imports, China seems to have answered the call in 2018. After a long flat period (imports around one million tonnes between 2014 and 2017), there was a sudden leap, with Chinese imports reaching more than 1.5 million tonnes in 2018. To be precise, the take-off started in the second half of 2017. Since then the market has maintained an upward trend. Of course, 1.5 million tonnes shared out between a population of 1.4 billion amounts to extremely little. These imports are topping up local dessert banana production estimated at 12.5 million tonnes and situated mainly in the provinces of Guangdong, Guangxi, Yunnan and on Hainan peninsula. Increasing demand, as well as production greatly handicapped by the presence of Panama TR4 disease, largely explain the boom in imports. Alongside the Filipino giant (1 million tonnes), the supply is topped up by three other origins (Ecuador, Vietnam and Myanmar). Note that Chinese operators also have a very big presence over the border in Laos, producing for the big market to the north (no data in the statistics), under dreadful social and environmental conditions ■

Banana - China - Annual imports
(in 000 tonnes | source: Customs)



Banana - China - Imports by origin in 2018
(source: Customs)



Banana Market in Japan

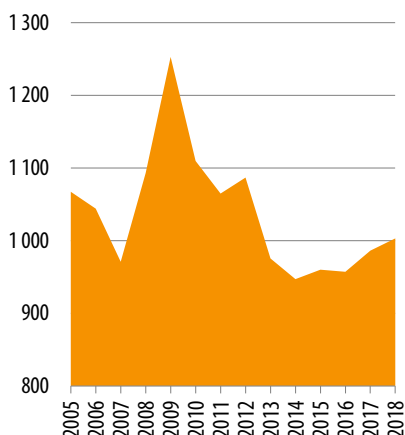
A praiseworthy performance

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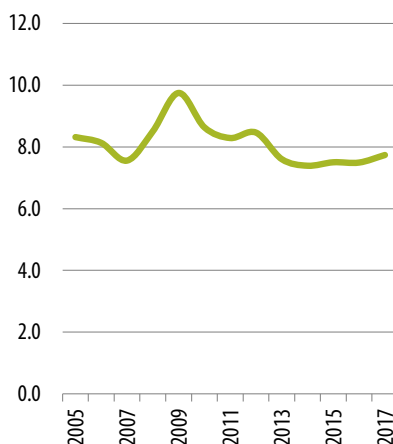
Kiai! The performance of the Japanese market is worthy of the samurai's battle cry ("the death cry"). Since 2012, Japanese imports had not exceeded one million tonnes. Yet it did manage this feat in 2018 with 1 003 000 tonnes! The Philippines still holds 84 % of demand, with Ecuador in poor form trailing well behind. Annual consumption per capita leapt to 7.9 kg (+ 150 g), thanks also to a shrinking population ■



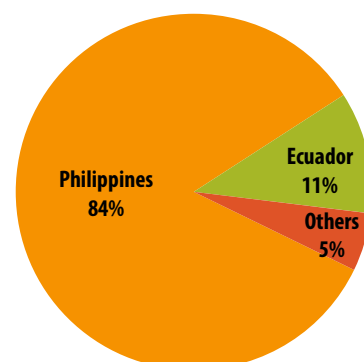
Banana - Japan - Annual imports
(in 000 tonnes | source: Customs)



Banana - Japan - Consumption
(in kg per capita | source: Comtrade)



Banana - Japan - Imports by origin in 2018
(source: Customs)

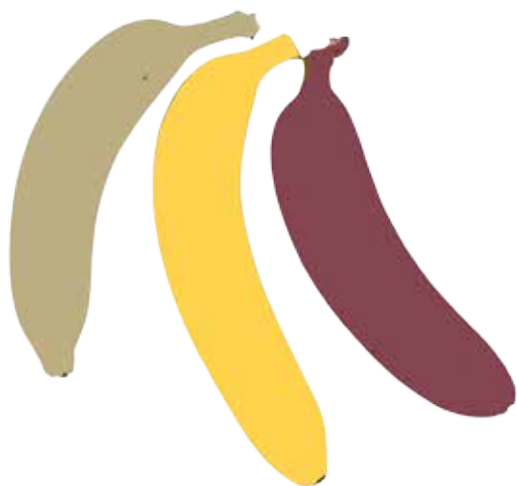


Banana

Market in the United States

Stagnation

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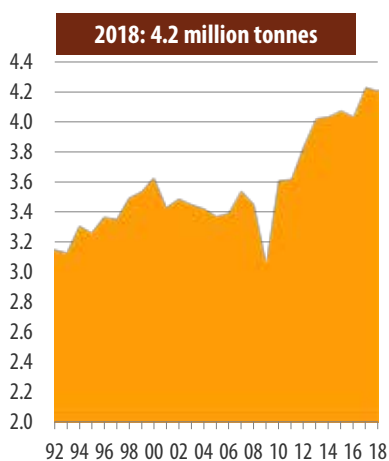


The attentive reader will have realised that the big world markets, which we are talking about in this 2018 review, had bigger banana imports. The only zone to buck the trend was the USA and Canada zone. Their combined imports were down by 1 % to 4.8 million tonnes. Guatemala was by far the number one supplier with a 41 % market share. Its volumes were stable, while those of Costa Rica and Honduras fell by 13 % and 8 % respectively. Ecuador was a big hit, with 15 % growth. At the bottom of the table, we can find Mexico (+ 10 %) and also Colombia (+ 9 %). Annual consumption per capita remained practically unchanged at 12.9 kg.

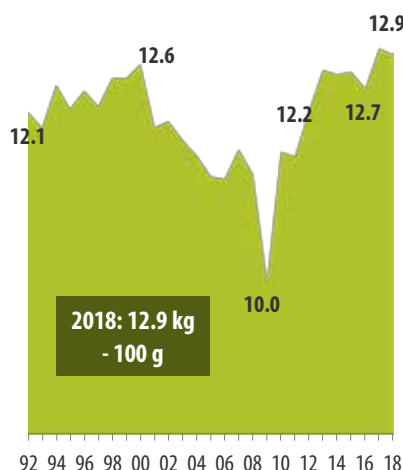
This import zone is the only one to offer data on the organic segment. Hence we can observe that volumes were up by one third over a year to 571 000 tonnes, for an estimated market share of 12 %.

Generally speaking, this volume stagnation on the North American market (USA and Canada) indicates the complete control of the market by the traditional operators. In a period of very high supply pressure, as may have been the case in 2018, the other markets responded by stepping up their procurement... and with a historic fall in prices, especially in Europe. None of that happened in the USA and Canada, two supposedly ultra-liberal markets, yet ultimately ultra-controlled by their market operators. Perhaps this is the American version of "do as I say (to the WTO), not as I do" ■

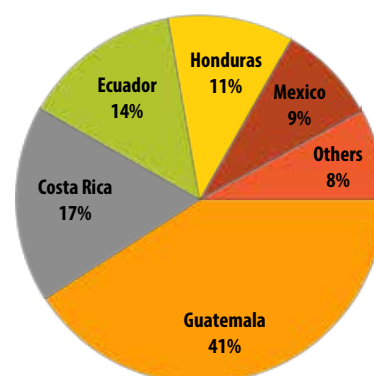
Banana - USA - Net supply
(in million tonnes | source: Customs)



Banana - USA - Consumption
(in kg per capita | source: Customs, 2018 provisional)



Banana - USA and Canada Imports in 2018



Banana Market in Russia

Ever increasing consumption

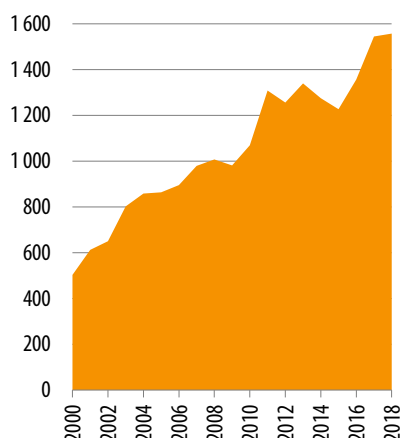
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We can only marvel – Russia has consolidated its import levels at nearly 1.6 million tonnes. This is excellent news, especially for the Europeans. Since if Russia sneezes, Europe catches cold. 96 % of the Russian supply comprises highly mobile Ecuadorian bananas “of no fixed abode”, and very much able to cross the Eastern borders of the EU. Hence after two years of very strong growth (11 % in 2016 and 14 % in 2017), an ebb was expected; yet 2018 saw the market make a one point gain. Annual consumption per capita increased again to reach 10.8 kg, bearing in mind that the population is shrinking. This figure was just 8.5 kg in 2015 ■

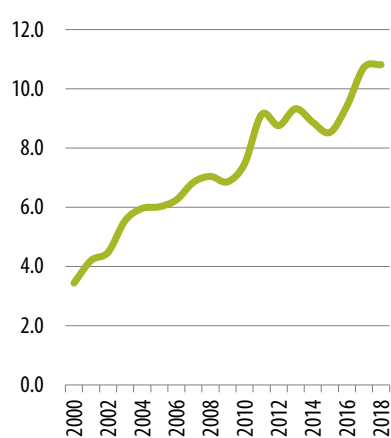


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Banana - Russia - Annual imports
(in 000 tonnes | source: Customs)



Banana - Russia - Consumption
(in kg per capita | sources: Comtrade, Eurostat, Cirad)



Banana - Russia - Imports by origin in 2018
(source: Customs)

