
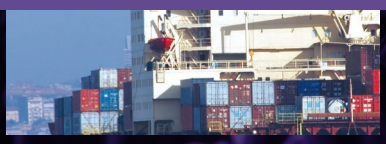


Implications of Trade Policy Changes for the Competitiveness of Ecuadorian Banana Exports to the EU Market

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ICTSD
International Centre for Trade and Sustainable Development

Issue Paper No. 10

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FOREWORD

Bananas has been a particularly sensitive matter in Ecuador´s negotiations on international trade for decades. In its most recent iteration the issue has been at the forefront of talks concerning the establishment of regional trade agreements between the European Union (EU) and Andean countries, as well as in the context of the EU-Central American negotiations. As the world's largest exporter of bananas, Ecuador plays a critical role in the definition of the fruit's world prices. The EU, on the other hand, being the largest importer of bananas is a critical player in the determination of levels and dynamics of demand. An agreement between these two parties is likely to have significant impacts on the world market for bananas and related development challenges.

Our research builds on a series of policy dialogues and consultations held by ICTSD over the past fifteen years, and in particular the last two years, with ministers, policy-makers and other stakeholders from banana producing and exporting countries. This work attracted the attention of the "Ministerio de Coordinación de la Política Económica del Ecuador" (Ecuadorian Ministry of Economic Policy Coordination) and forms the basis for the paper that follows. Through the facilitation of the Ministry and ICTSD, Prof. Anania engaged with a diversity of stakeholders at the national level. Discussions with public and private sector actors led to a reformulation of some key questions and the discovery of new avenues of research. In this way, Prof. Anania has now been able to address issues not yet covered by existing literature.

Most observers believe that the country's banana industry would significantly benefit from Ecuador reaching a trade agreement with the EU similar to those already finalized with Peru, Colombia and the Central American countries.

However, the political decision of signing a Free Trade Agreement (FTA) with the EU needs to be based on an assessment of the overall costs and benefits Ecuador will face.

Given the relevance of bananas to livelihoods and development for varied Ecuadorian constituencies, any study on the proposed FTA with the EU ought to reflect the rich debate in the country. ICTSD's unique approach as an impartial and objective facilitator allows us to capture the diversity of opinion on the matter and is reflected in our findings.

The paper that follows should not be taken as a deliberation on the impact of the trade agreement as a whole. Rather, it focuses on how a trade deal between Ecuador and the EU could impact trade in bananas as well as the competitiveness of the industry. This study should be of use to policy makers, negotiators and other stakeholders and we hope you find this a useful contribution to a sensitive, yet critical, discussion.

Ricardo Meléndez-Ortiz
Chief Executive, ICTSD

EXECUTIVE SUMMARY

The paper discusses implications for Ecuador of a possible bilateral trade agreement with the EU which includes provisions for banana trade similar to those contained in the trade agreements the EU signed in 2010 with Colombia, Peru and Central American countries.

Its main conclusions can be synthesized as follows:

1. **Trade policy changes do matter.** The EU, with 27.1% of the world market in 2008, is the largest importer of bananas. The EU import regime for bananas underwent major changes in recent years which affected – with different, sometimes opposing, effects - the relative competitiveness of banana exports to the EU from different countries. These changes include the 2001 'Everything But Arms' initiative, the introduction in January 2006 of the EU 'tariff-only' import regime, the implementation in January 2008 of the Economic Partnership Agreements (EPAs), the December 2009 WTO agreement on bananas, and the 2010 Trade Agreements (TAs) between the EU and Colombia and Peru and the Association Agreement with Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama. The introduction in 2006 of the 'tariff only' import regime and in 2008 of the EPAs significantly affected banana trade. The 'tariff only' import regime brought a significant increase in EU-27 imports from MFN countries, which rose from volumes very close to 3.1 million tonnes in 2000-2005, to 3.6 million tonnes in 2006, 3.9 in 2007 and over 4 million tonnes in 2008. ACP exports to the EU increased from 843,000 tonnes in 2007 to 920 in 2008, 960 in 2009 and over 1 million tonnes in 2010.

2. **Not only is Ecuador, by far, the largest exporter of bananas in the world, but it has proved in recent years to be a strong and competitive exporter.** Ecuador is a key competitive player in the banana market. Banana production in Ecuador between 1990 and 2009 increased from 3 to 7.6 million tonnes. Ecuador's exports show over the same time period a regular upward sloping trend; Ecuador's share of the growing world market for bananas increased from 23.9% in 1990, to 27.8% in 1995, 27.9% in 2000, 29.4% in 2005 and 29.3% in 2008. Ecuador is the only country which is able to export significant volumes of bananas to both segments of the world market: the East Asia & Oceania market, and the rest of the world.

3. **The EU is a strategic market for Ecuador's banana exports.** Almost 85% of Ecuador's banana exports in 2009 were directed toward three markets only: the European Union (39.2% of total exports by Ecuador), Russia (23%) and the US (22.4%). Ecuador's exports to the EU increased between 2000 and 2009 from 1.4 million tonnes to 2.2. (+60%, from 33.6% of Ecuador's exports to 39.2%).

4. **The implications for Ecuador of the 2010 Trade Agreements between the EU and Colombia, Peru and the Central American countries will be different in the short run (until 2020), and in the medium run (from 2020).** This is because the reduction of the tariff imposed on EU imports of bananas from the countries which signed the TAs will be progressive and because after 2019 the 'safeguard' clause based on the 'Trigger Import Volumes' (TIVs) will no longer be active.

5. **The TAs between the EU and Colombia, Peru and the Central American countries in the short run (between now and 2020) will have a small, gradually increasing, impact on Ecuador's banana exports and export prices**. Ceteris paribus, Ecuador will export a little less to the EU and receive a somewhat lower price for its bananas; however, until the end of 2019 the impact of the TAs on Ecuador's banana exports will be mitigated by (a) the implementation of the preferential tariff reduction being progressive and (b) the TIV provisions, which will act as a 'safeguard' for Ecuador as well as for the EU.

6. **After 2019 the negative impact of the TAs on the relative competitiveness on the EU market of Ecuador's banana exports will be significant.** This will be the case because of both, the magnitude of the preferential margin enjoyed by that time by the eight countries benefitting from the TAs, and the 'safeguard' clause being no longer applied. Ceteris paribus, Ecuador is expected to export less to the EU than it would in the absence of the TAs and receive a lower price for its exports.

7. **Benefits for the banana industry from Ecuador reaching a trade agreement with the EU similar to those agreed by Peru, Colombia and the Central American countries would be significant.** The benefits for Ecuador's banana industry of reaching a trade agreement with the EU similar to those signed in 2010 by Colombia, Peru and the Central America countries will be small during the implementation period, but will become sizeable thereafter. It is important to recognise that the preferential tariff gap resulting from the TA would increase the competitiveness in the EU market of Ecuador's banana exports vis a vis exports from the Philippines, which are subject to the MFN import regime. However, obviously, the decision to be made regarding Ecuador's interest in negotiating a TA with the EU needs to be based on an assessment of the overall net effect of the agreement, i.e. on a comparison of the benefits, of diverse nature, Ecuador will obtain from the TA and of the costs, again, of diverse nature, Ecuador will have to face as a result of the agreement. Not only that, but, the distribution of expected costs and benefits among different social groups needs to be carefully assessed as well.

8. **In a possible negotiation of a TA between Ecuador and the EU, the chapter on bananas will likely focus, at the most, on two elements only: (a) the timing of the reduction of the tariff faced by Ecuador's exports and (b) the volume of the TIVs during the implementation period.** As regards bananas, in negotiations with Ecuador it is unlikely that the EU would be willing to accept provisions different from those included in the analogous TAs signed with Colombia, Peru and the Central American Countries. This means that the level of the preferential import tariff to be eventually reached - 75 €/tonne – would not be a matter for discussion. With respect to the timing of the progressive reduction of the tariff faced by its exports, Ecuador's interest is for the implementation period to be as short as possible and significantly shorter than 10 years, the length of the implementation period for the eight countries which already concluded the TAs. The negotiation space for Ecuador's TIVs seems constrained by receiving, at one end, a generous treatment similar to that granted to Peru, and, at the other end, a much less generous treatment similar to that granted to Colombia. However, Ecuador being a very large and competitive exporter, it is unlikely that the EU would be ready to consider granting it 'generous' provisions, similar to those granted to Peru.

9. **There are several factors different from the EU import regime which are relevant in determining the competitiveness of Ecuador's banana exports in the EU market.** These include: the euro/$ exchange rate; product differentiation, including organic and fair trade bananas; productivity in banana production and quality of domestic logistic infrastructures; the distribution of power along the banana market chain; as well as factors outside the area of possible intervention by the Ecuadorean Government, such as developments in international transportation technologies and costs; developments in the degree of concentration and in buying and pricing strategies by the retail sector, and structural changes in international banana trading.

10. **Need emerges for the design and implementation of an 'integrated policy action plan' for Ecuador's banana industry.** Current and potential public policy interventions in the banana sector in Ecuador include very different policy instruments and touch very different aspects of banana production and trade: from fiscal policies (at farm and border level), to regulating contractual terms of domestic banana trade by fixing the minimum price per box of bananas to be paid by exporters to producers; from regulating farm obligations to its employees in terms of working conditions, minimum wages and social security coverage, to investments in research and development activities; from increasing efforts for the effective implementation of existing regulations (a relevant policy issue per se), to investing in physical domestic infrastructures or in market promotion or development plans. There is a need to develop an 'integrated policy action plan'. This plan should first identify the public goals to be achieved; then cast all public policy interventions relevant for the banana industry to be implemented (current interventions; modified ones, if required; innovative ones) in a single integrated and coherent plan of policy action; finally, identify the contribution expected by the public sector as well as by each of the social groups involved.

1. INTRODUCTION

The goal of this relatively brief policy issue paper is to discuss, on a qualitative basis, the expected implications of Ecuador reaching/ not reaching a bilateral trade agreement with the EU which includes provisions for banana trade similar to those contained in the trade agreements the EU signed in 2010 with Colombia, Peru and Central American countries.

The following section of the paper briefly discusses the characteristics of the world market for bananas and identifies its main actors, both importers and exporters. Section three presents recent changes in the EU domestic and import policy regimes for bananas and discusses their impact on the banana trade. These changes include: the 2001 'Everything But Arms' (EBA) initiative, whose implementation for bananas was completed in 2006; the 2006 reform of the policy intervention supporting domestic banana production; the introduction in 2006 of the 'tariff-only' import regime; the implementation in 2008 of the Economic Partnership Agreements (EPAs); the December 2009 WTO agreement on bananas; and, finally, the 2010 trade agreement between the EU and Colombia and Peru and the Association Agreements with Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama. Section four focuses on structural elements and recent developments in both, Ecuador banana exports and EU banana imports; the expected implications for the EU market and for Ecuador banana exports, in the short and medium term, of the 2010 agreements reached by the EU and Colombia, Peru and the Central American countries are discussed in detail. Section five discusses possible issues specific to the banana chapter of a possible negotiation of a trade agreement between Ecuador and the EU. Finally, the concluding section briefly discusses factors different from trade policy changes which may affect the competitiveness of Ecuadorian bananas on the EU market which may require policy action by the Ecuadorian Government.

2. THE WORLD MARKET FOR BANANAS

Contrary to what happens in most markets, some of the world largest producers of bananas are not among the main exporters. In fact, India, by far the largest producer, and China, the third largest producer (figure 1), are not significant actors in banana trade (figure 2); in fact, in 2008 India exported less than half percent of the bananas it produced, Brazil less than 2% and China was a net importer, while Ecuador, Costa Rica and the Philippines exported 79%, 96% and 22% of their banana production, respectively. Ecuador, the forth largest producer of bananas is, by far, the largest exporter. In 2009[1] Ecuador exported 5.7 million tonnes of bananas; Colombia was the second largest exporters with 2.1 million tonnes, followed by the Philippines (1.7), Guatemala (1.6) and Costa Rica (1.2).

Banana world trade is segmented in two distinct markets, one in East Asia and Oceania, the other involving the rest of the world. While the Philippines export to the former segment of the market only, where it is the market leader, its exports in the rest of the world remain negligible, Ecuador exports bananas to both markets (the only exporter able to do so).

Strong concentration emerges on the importers' side as well, with the EU and the US alone accounting for more than 50% of world imports (figure 3). Considering only net imports (i.e. netting out imports from re-exports), EU27 alone absorbed 27.1% of world imports; the market share of the US was 23.9%, followed by Japan (6.6%), Russia (6%), Canada (2.9%), and China (2.2%).

The world market for bananas is expanding. Looking at the past 20 years, production, consumption and trade of bananas have all been growing (figure 4). Since the early 2000s production and consumption have been expanding at a pace faster than in the previous 15 years. Exports have been growing at a lower rate than production; as a result, the share of world production devoted to exports is declining at the expense of the share of production which is consumed domestically.

Consumption is growing as a result of increases in both, world population and per capita consumption. Figure 5 provides per capita consumption of bananas for the world as a whole and for the main importing countries - EU, USA, Japan and Russia - between 1997 and 2007. World per capita consumption increased from 8.4 to 10.8 kg per year (+28.6%). While Japan's per capita consumption shows fluctuations, but no significant upward or downward trend, in the US per capita banana consumption, albeit remaining above levels observed in the other main importers, shows a declining trend, probably due to competition from other fruits in the presence of a relatively high level of per capita consumption of bananas. On the contrary, per capita consumption continues to grow in the EU and Russia; in the EU between 1997 and 2007 it increased from 7.7 to 8.9 kg per year (+15.6%), in Russia from 4.4 to 6.8 (+54.5%).

Because of differences in demographic size, consumption habits and per capita incomes, banana consumption in the EU is highly concentrated in few member states. Germany, United Kingdom and Italy alone accounted in 2007 for more than 50% of total banana consumption in the 27 member states; if Spain, France, Romania, Sweden and Portugal are added, the share of total EU-27 consumption approaches 80% (figure 6).

If per capita consumption in 1997 and 2007 in the largest EU banana consuming member states are compared, mixed evidence emerges, with an increasing trend in the UK, Italy, France, and Romania, and no significant trend in Germany, Spain, Sweden and Portugal (figure 7). Per capita yearly consumption of bananas in each member state in 1997, 2002 and 2007 are provided in table 1.

3. RECENT DEVELOPMENTS IN THE EU IMPORT REGIME FOR BANANAS

As mentioned above, the EU, with 27.1% of the world market in 2008, is the largest importer of bananas. Domestic production covers around one sixth of domestic consumption, with imports from MFN (Most Favoured Nation) and preferred ACP (African, Caribbean and Pacific) countries covering two thirds and one sixth of the EU market, respectively.

While the other main importer, the US (23.9% of the world market), imposes, *de facto*, no duties on its banana imports, the EU always applied a relatively complex import regime, meant to protect domestic banana producers, and, among the sources of its imports, ACP countries, which are former colonies of member states, vs. other developing country exporting at MFN (i.e. non preferential) conditions.

As a result of international pressure and the reform of the Common Agricultural Policy, both the EU trade and domestic policy regimes for bananas have undergone major changes in recent years.

The reform of the EU Common Market Organization for bananas. In December 2006 the EU approved a reform of its domestic policies for bananas.[2] The reform cancelled the previous Common Market Organization regime for bananas, which provided generous support to domestic producers through a 'deficiency payment' scheme, where the per unit subsidy was given by the difference between a reference price, which did not change over time, and the observed domestic market price. The reform made banana production in Canary Islands (Spain), Guadeloupe and Martinique (France's 'overseas territories') - which, together, accounted in 2009 for 93% of EU domestic banana production - independent of market conditions. The expected medium term impact of the reform of the EU domestic policy regime for bananas is a significant drop in EU banana production and an increase in domestic market prices and imports. As a matter of fact, EU banana production has been declining since the mid 1990s, with most of the reduction taking place in Guadeloupe and Martinique (figure 8).

Recent developments in the EU import regime for bananas include the 2001 'Everything But Arms' initiative, the introduction in January 2006 of the EU 'tariff-only' import regime, the implementation in January 2008 of the Economic Partnership Agreements, the December 2009 WTO agreement on bananas, and the 2010 Trade Agreement between the EU and Colombia and Peru and the Association Agreement with Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama.

The Everything But Arms initiative. With the EBA initiative[3] the EU granted duty-free and unlimited market access to all imports, except arms and ammunitions, originating in Least Developed Countries (LDC).[4] Since 1 January 2006 EU banana imports from LDC enter the EU tariff-free and without any quantitative limitation. So far the EBA initiative has not generated significant results in terms of increased LDC exports to the EU. Most analyses converge in judging the trade preference granted, albeit considerable, insufficient to enable LDC to overcome other factors, linked to both costs of production and product quality, which make their exports to the EU market not competitive. As regards bananas, LDC remain today a very marginal actor in international trade.

The EU 'tariff only' import regime. On 1 January 2006 the EU introduced a 'tariff only' import regime for bananas, removing the tariff rate quota (TRQ) for imports under MFN conditions (the TRQ was equal to 3,113,000 tonnes, with imports within the quota subject to a 75 €/tonne import tariff and out-of-quota imports subject to a prohibitive tariff equal to 680 €/tonne), setting the MFN tariff equal to 176 €/tonne and expanding the duty-free quota reserved for imports from ACP countries from 750,000 to 775,000 tonnes (out-of-quota exports

were subject to the 176 €/tonne MFN tariff). The 'tariff only' import regime increased significantly EU market access for MFN bananas by removing the rigidities associated to quota licences, by eliminating quota rents and by introducing a tariff which implied less restrictive market protection. In fact, the change in the EU import regime brought a significant increase in EU-27 imports from MFN countries, which expanded from a level, in years 2000-2005, very close to the 3,113,000 MFN quota to 3.6 million tonnes in 2006, 3.9 in 2007 and over 4 million tonnes in 2008; in 2009 and 2010 imports declined, but remained well above their levels before 2006 (figure 9).

The Economic Partnership Agreements. On 1 January 2008 the EU implemented the EPAs it negotiated with ACP countries.[5] The EPAs will progressively remove barriers to trade between the EU and several groupings of ACP countries, in a bid to create free trade areas in compliance with WTO rules. All agricultural exports from ACP countries which have successfully concluded the negotiations are now allowed duty- and quota-free access to the EU. Bananas, along with sugar and rice have been indicated as the agricultural commodities for which most of the export benefits of the EPAs for ACP countries are to be gained. The previous regime for ACP country banana exports to the EU included a duty-free 775,000 tonnes tariff rate quota for imports from ACP countries, while the MFN tariff of 176 €/tonne was imposed on out of quota imports. The EPAs increased the competitiveness of ACP bananas in the EU market and eliminated rigidities associated to quota licences as well as quota rents. ACP exports to the EU have increased by roughly 7% a year since 2007, from 843,000 tonnes in 2007 to 920 in 2008, 960 in 2009 and over 1 million tonnes in 2010 (figure 9). ACP share of the EU market increased at the expenses of that of MFN countries from 17.7% in 2007 (the lowest value in the 2000-2010 decade, following the introduction of the 'tariff only' import regime for MFN exporters), to 18.5% in 2008, 20.7% in 2009 and 22.3% in 2010 (figure 10).[6]

The December 2009 WTO agreement on bananas. In December 2009 Latin American exporters, the US and the EU reached an agreement to bring to an end the long-standing 'banana war' at the WTO, dating back to 1996. The agreement called for a reduction of the EU MFN tariff on bananas from 176 to 114 €/tonne between the signing of the agreement and 2017 (if agriculture modalities are agreed by 31 December 2013, otherwise the tariff will reach 114 €/tonne two years later, in 2019), with an immediate 28 €/tonne tariff cut and subsequent cuts thereafter (table 2). The countries involved agreed on this tariff to be excluded from further cuts resulting from the conclusion of the Doha round, if any. It is too early to assess the impact of the agreement on banana trade. The expected effects of the progressive reduction of the MFN tariff are two-fold: a trade creation effect, i.e. a progressive increase in total banana exports, and a trade diversion effect, i.e. a decline in ACP banana exports to the EU and an increase of MFN exports (with the increase in MFN exports being larger than the decline in ACP exports).

The 2010 Trade Agreements between the EU and Colombia and Peru and Association Agreement between the EU and Central American countries. In 2010 the EU concluded Trade Agreements (TA) with Colombia and Peru and, later, an Association Agreement (AA) with six Central American countries (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama). The AA includes three main "pillars": a "trade" agreement, a "cooperation" agreement and a "political dialogue" agreement. The provisions on bananas are considered among the key elements in all the TAs from the perspective of the American countries. EU concessions on bananas are the same for all eight countries: the EU agreed to progressively reduce its import tariff on bananas originating in these countries to 75 €/tonne by 1 January 2020. In the absence of any agreement, the import tariff to be applied to their exports in 2020 would have been 114 €/tonne (the MFN tariff). This means that the new regimes introduce a preferential margin

with respect to Ecuador banana exports which will increase progressively from 3 €/tonne in 2010 to 39 €/tonne from 2020 on (table 2). A 'safeguard' clause ('stabilization clause' in the language of the agreements) will apply until 2020 to prevent larger than anticipated increases in EU banana imports; if imports from a specific country in a given calendar year exceed that country-specific 'trigger import volume' (TIV) for that year, then the EU may suspend for up to three months, or until the end of the calendar year (whichever comes first), the preferential import regime and revert to imposing the MFN tariff. In other words, if, for example, a country's exports exceed the TIV for that year in July, the EU is allowed to impose the MFN tariff only for the following three months, after which the preferential tariff will be reapplied for the remaining part of the year. The fact that the preferential tariff can be suspended for no more than three months is the only element which makes the safeguard mechanism different from a country-specific tariff rate quota. Due to the 'safeguard' clause, the effects on banana trade of the progressive preferential reduction of the tariff applied by the EU on its imports from the eight countries involved are likely to unfold only after 2020, when the clause is due to expire.

Tariffs applied by the EU to its banana imports under the different import regimes between 2010 and 2025 are represented in figure 11.

4. ECUADORIAN BANANA EXPORTS AND THE EU MARKET

Banana production in Ecuador between 1990 and 2009 shows three phases: a strong positive trend between 1990 and 1997, when production rapidly increased from 3 to 7.5 million tonnes; a stable production between 1998 and 2007, with relatively small fluctuations around 6 million tonnes; and, again, a strong expansion in most recent years, when production reached 7.6 million tonnes (figure 12). Ecuador's share of world production of bananas was 6.5% in 1990, reached its maximum value, 12.1%, in 1997 and was 7.8% in 2009 (figure 12).

Ecuador's exports, on the contrary, show over the same time period a regular upward sloping trend, only steeper in years when production increased, less pronounced between 1998 and 2007, when production remained relatively stable (figure 13). Ecuador exports' share of the world market increased over the years: from 23.9% in 1990, to 27.8% in 1995, 27.9% in 2000, 29.4% in 2005 and 29.3% in 2008[7] (figure 13). When exports by the top five exporters – Ecuador, Costa Rica, Philippines, Colombia and Guatemala – over the past decade are compared, Ecuador shows a stronger rate of growth, apart from that of Guatemala in more recent years, and a more stable overall trend (figures 14 and 15).

Not only is Ecuador, by far, the largest exporter of bananas in the world, but it has proved in recent years to be a strong and competitive exporter.

Several factors determine jointly the cost of Ecuador's banana exports. Information on developments in one of these factors, land productivity, is provided in figure 16.[8] Banana production per hectare of land used to produce bananas in Ecuador shows a clear upward sloping trend between 1990 and 2009 (figure 16). Land productivity in Ecuador has been and remains significantly higher than the world average but lower than that of two important competitors such as Costa Rica and Guatemala, while Colombia - as a result of the clear, significant, decline in land productivity in banana production - shows a production of bananas per hectare which in most recent years remained below that of Ecuador, yet the contrary was true throughout most of the 1990s and early 2000s.

Almost 85% of Ecuador's exports in 2009 were directed toward three markets only: the European Union (2,244 thousand tonnes, including re-exports by EU member states; 39.2% of total exports by Ecuador), Russia (1,319 thousand tonnes; 23%) and the US (1,283 thousand tonnes; 22.4%) (figure 17). Chile and Argentina were the next most important destinations, with exports close to 200 thousand tonnes each, around 3.5% of Ecuador banana exports, while total exports to other destinations were close to 500 thousand tonnes (8.5%). Ecuador's exports to the EU and Russia have both increased since 2000; those to Russia from 500 thousand tonnes in 2000 and 2001 to 1.3 million tonnes in 2009 (+140%, from 13.4% of Ecuador's exports to 23%), those directed to the EU from 1.4 million tonnes to 2.2 (+60%, from 33.6% to 39.2%) (figures 18, 19 and 20). Exports to the US fluctuated around one million tonnes, with a peak of 1.3 million tonnes in 2009. Finally, Ecuador's exports to destinations different from the EU, Russia and the US have been stable between 2001 and 2006 around 750 thousand tonnes, but increased in more recent years, reaching 880 thousand tonnes in 2009 (figure 18). As mentioned above, Ecuador is able to export bananas to East Asia and Oceania, a market where the Philippines are the leading exporter. Ecuador exports bananas to New Zealand (it holds 35% of the market) and Japan (5%); however, over the years Ecuador has been losing large portions of these markets to the Philippines: it share of these markets in 2000 was 89% and 20%, respectively.

In 2010, 3.6 million tonnes (77.7%) of bananas imported by the EU originated in countries subject to its MFN import regime, and 1 million tonnes (22.3%) in ACP countries, whose exports enter the EU tariff-free. As discussed above, the competitiveness of MFN bananas on the EU market changed dramatically in 2006 with the

abolition of the quota and the introduction of the 'tariff only' import regime; MFN countries' exports to the EU increased from 3.2 million tonnes in 2005, to 3.6 in 2006, 3.9 in 2007 and 4 million tonnes in 2008. However, MFN exports to the EU declined in 2009 (3.7 million tonnes) and 2010 (3.6), when ACP exports increased as a result of the significant expansion in the preferential market access granted to them by the EPAs (figures 9 and 10).

As a result of differences in the access to quota licenses before 2006, Colombia seems to be the MFN country which benefitted the most from the removal of the MFN quota on EU banana imports, while exports to this market from the other two main exporters, Ecuador and Costa Rica, appear to have increased less significantly (figure 21). Colombia's share of the EU market exceeded 26% in 2008, 2009 and 2010, from levels below 20% between 2000 and 2004. The shares of Ecuador and Costa Rica do not show significant changes over the decade, as Colombia replaced exports from Panama and other residual MFN exporters, whose joint share went from around 15% at the beginning of the decade down to 7% in 2009 and 2010 (figure 22).

Useful information regarding the competitiveness of Ecuador's bananas in the EU market can be obtained by analyzing differences in average unit values of Ecuador banana exports to different destinations (figure 22) and differences in average unit values of EU banana imports from different sources (figure 23). Average unit values of Ecuador banana exports at its border, as reported by the same country, to its three main destination markets – the EU, Russia and the US – from 2000 to 2009 are very close, but for 2006, when exports to the US registered a per unit value unexpectedly higher than those of bananas exported to the EU and Russia. On the contrary, the average unit value of Ecuador exports to markets different from the main three destinations were always significantly lower, with the gap increasing over time and reaching around 70 US$/tonne at the end of the 2000s, from 15 US$/tonne at the beginning of the decade. When average unit values of EU banana imports at its border and based on its own custom reporting are considered, those of Ecuador, Colombia and Costa Rica clearly appear to be moving together. However, those of Ecuador tend to be systematically the lowest of the three and those of imports from Costa Rica the highest (figure 24); however, the wedge between the average unit value of Costa Rican and Ecuadorian bananas at the EU border seems to have become ever smaller over the years. Finally, when average unit values of Ecuador's banana exports to the EU as reported by Ecuador and the EU at the respective borders are compared, the wedge between the two expands over the years (figure 25). This may be due to a range of factors, including increased international transaction costs and changes in non competitive behaviours by banana traders, including strategic pricing.

Between today and 2019 there will be two changes progressively taking place in the EU import regimes for bananas: those due to the 2009 WTO agreement and those due to the TAs between the EU and Colombia, Peru and the Central American countries.

The EU MFN import tariff will be progressively reduced from its current level of 143 €/tonne to 114 €/tonne, assuming that DDA modalities in agriculture will not be agreed by 31 December 2013, otherwise this will occur by 2017 (table 2; figure 11). This reduction in the MFN tariff, *ceteris paribus*, is expected to bring (a) an increase in EU total imports and (b) an increase in the share of EU imports of bananas from MFN countries (while imports from ACP countries are expected to contract). Ecuador's banana exports to the EU are expected to increase as a result of the 2009 agreement on bananas; however, the increase in Ecuador's overall exports is expected to be somewhat smaller; in fact, because of the changes in relative prices, Ecuador will find it profitable to redirect to the EU market some of its exports previously directed to other destinations.

Two distinct phases are to be considered when assessing the implications for Ecuador of the implementation of the changes in the EU import regime for bananas as a result of the 2010 TAs

with Colombia, Peru and Central American countries: the implementation period until 2020, and the subsequent period, when the agreements will be in force and the 'safeguard' clause based on the TIVs regime will no longer be active.

The implementation of the TAs with Colombia, Peru and the Central American countries will progressively reduce the import tariff their banana exports will face in the EU market, to reach by the year 2020 75 €/tonne (table 1; figure 3). This implies a preferential margin *vis a vis* Ecuador banana exports which will increase over time to reach 39 €/tonnes in 2020, a margin of an order of magnitude which makes a difference in relative competitiveness (figure 26). However, it is important to recognise that until 2020 banana exports at increasing preferential conditions originating from the countries which signed the TAs will be subject to the 'safeguard' clause and less favourable preferential tariff conditions with respect to those when the TAs will be fully implemented.

Until 2020, a given country's benefits from the agreement with the EU will depend on the volume of its exports which would have occurred had the agreement not been signed. Four cases are possible:

1. **In the absence of any agreement exports to the EU subject to the MFN tariff would be equal to, or larger than, the TIV.** In this case exports and equilibrium prices would remain unchanged under the agreements. However, this does not mean that the TAs have no effect; in fact, they determine an income transfer from the EU budget to (most likely) banana traders, in the form of 'rents' deriving from the lower tariff applied on the country's exports up to the TIV.

2. **In the absence of any agreement exports to the EU subject to the MFN tariff would be above zero but below the TIV.** In this case the agreements will lead to an increase in the country production, exports and price received, while the opposite will occur for the EU domestic price and for the import price paid for bananas originating in countries, like Ecuador, whose exports remain subject to the MFN tariff. In this case too, depending on the equilibrium reached, part of the reduction in EU tariff revenue on its imports originating in the countries which signed the TAs may well become 'rents' to be captured (again, most likely) by banana traders.

3. **In the absence of any agreement no exports to the EU would occur at the MFN tariff, but they become profitable under the preferential tariff.**

4. **In the absence of any agreement no exports to the EU would occur at the MFN tariff, and the preferential margin granted by the agreements is not sufficient to make them profitable.**

The TAs will generate benefits for the Andean and Central American countries in the first three cases (assuming, rather optimistically, that in case 1 'rents', no matter who captures them, will induce indirect benefits in the exporting country), but production and trade will increase only in cases 2 and 3. This means that during the implementation phase Ecuador banana exports and price received will be affected only if some of the beneficiary countries fall under cases 2 and 3.

To help assess which case may apply to which country, figures 27-30 give for each of the eight countries who signed the TAs with the EU: total banana exports and exports to the EU between 2000 and 2009, and expected exports under the pre-TAs regime (this is the linear trend based on the country's exports to the EU between 2000 and 2009) and TIVs from 2010 to 2019.

Colombia (figure 27) is a possible 'case 1' candidate. In fact, based on recent trends, expected banana exports to the EU appear very close to the TIVs it will face;[9] in addition, its overall exports have been increasing and under the new import regime it will become profitable for Colombia to divert some of its exports from other destinations to the EU market. The reduction in EU tariff revenue which will become 'rents', likely to be transferred to

banana traders, will equal 4 million euro in 2010, to reach 76 million euro by 2019. Peru (figure 27), Costa Rica (figure 28) and Panama (figure 30) seem likely 'case 2' examples. Costa Rica and Peru, on different scales, show upward trends both for their exports to the EU market and overall, but expected exports to the EU under the MFN import regime were likely to remain below the TIVs. Panama, on the contrary, shows a negative trend for its banana exports, both to the EU and overall. All things being equal, the agreement with the EU should help contain this trend. Because of their current ability to export bananas, though not to the EU, Guatemala, Honduras and Nicaragua (figures 29 and 30) seem to fall under 'case 3', while El Salvador (figure 28) can either be a 'case 3' or a 'case 4'.

In the short term, i.e. between now and 2020, Ecuador is expected to see its relative competitiveness on the EU market progressively fall with respect to the signatories of the TAs (this will be the case as well for other MFN countries, ACP countries and LDC); *caeteris paribus*, Ecuador will export a little less to the EU and receive a somewhat lower price for its bananas. In fact, until the end of 2019 the impact of the TAs on Ecuador banana exports will be mitigated by the TIV provisions, which will act as a 'safeguard' for it as well as for the EU.

The 39 €/tonne preferential margin eventually granted by the TAs from 2020 onwards will significantly improve the competitiveness of the eight Andean and Central American countries on the EU market *vis a vis* Ecuador and other exporters. Gains for countries benefitting from the TAs which are already exporting bananas to the EU are expected to be conspicuous, as both their exports and the price they will receive for their bananas will increase. This will likely be the case for countries such as Colombia, Costa Rica and Peru. Countries that currently do not export bananas to the EU, or that are only marginal exporters, will benefit from the agreements only if the increase in their competitiveness on this market as a result of the preferential margin granted is sufficient to overcome the negative factors that make their exports currently unprofitable.

After 2019 Ecuador (as well as other MFN exporters to the EU, ACP countries and LDC) will see its relative competitiveness on the EU market significantly fall with respect to the eight signatories of the TAs. *Caeteris paribus,* Ecuador is expected to export less to the EU than it would in the absence of the TAs and receive a lower price for its exports. In markets different from the EU, imports will decline and prices increase, as a result of the trade diversion to the EU market of some of the exports of the Andean and Central American countries; this means that, on the contrary, Ecuador and other countries are expected to expand their exports to these markets, but this will only partially compensate for the decline of their exports to the EU.

5. BANANAS IN A POSSIBLE NEGOTIATION FOR A TRADE AGREEMENT BETWEEN ECUADOR AND THE EU

Originally the negotiations for a possible Association Agreement involved all four member countries of the CAN (Comunidad Andina de Naciones); however, Bolivia pulled out from the negotiations in 2007 and Ecuador 'suspended' its participation in 2009.

From what has been said so far, there is little doubt that the country's banana industry would significantly benefit from Ecuador reaching a trade agreement with the EU similar to those agreed by Peru, Colombia and the Central American countries.

Obviously, the decision needs to be based on an assessment of the overall net effect of the agreement, i.e. on a comparison of the overall benefits, of different nature, Ecuador will obtain from the TA and of the costs, again, of different nature, Ecuador will have to face as a result of the agreement. Not only that, but, in addition to the extent of the overall costs and benefits deriving from the agreement, their distribution among different social groups needs to be carefully assessed as well (because of the different 'weights' the policy maker may attach to each of them).

Should Ecuador decide to reopen its negotiations with the EU for a trade agreement containing a chapter on bananas similar to that signed by Colombia, Peru and the Central American countries, a first element to keep in mind is that this would hardly be in the interest of the other exporters to the EU, which would prefer an agreement between the latter and Ecuador not to materialize; in fact, this would either reduce the preferential margin they have secured (the eight Andean and Central American countries), or further reduce the competitiveness of their banana exports in the EU market (ACP countries, LDC and the other MFN exporters, such as Brazil and the Philippines).

As regards bananas, in the negotiations with Ecuador it seems unlikely that the EU would be willing to accept provisions different from those included in the TAs with Colombia, Peru and the Central American Countries. This means that negotiations will likely focus, at the most, on two elements only: (a) the timing of the reduction of the tariff faced by Ecuador's exports and (b) the volume of the TIVs in the implementation period. The preferential import tariff to be eventually reached - 75 €/ tonne - seems to be out of discussion.

With respect to the timing of the progressive reduction of the tariff faced by Ecuadorian banana exports, the negotiation appears to be constrained, at one end, by an implementation period as long as that included in the TAs which have already been signed (ten years), and, at the other end, by an implementation period lasting from the start of the implementation of the agreement, whenever this may be, and 2020, the date when the implementation period for Colombia, Peru and the Central American countries, will end. Ecuador's interest is for the implementation period to be as short as possible. The most advantageous scenario is probably tenable - on the basis that Ecuador, being a member of CAN, could have completed the negotiations along with the other members in 2010 – but difficult to obtain, because of possible opposition by the other countries indirectly involved as well as domestic producers in the EU, and because negotiation rigidities by the EU itself; in fact, the EU might be unwilling to concede to Ecuador provisions different from those granted to the other eight countries, as this could affect its 'reputation' in trade negotiations, which is an important asset.

The volumes of the TIVs agreed by the eight countries involved in the TAs are linked to recent exports to the EU by each of them; however, their values suggest that they are not the result of a common 'rule' having been uniformly applied to all countries. In particular, when the TIVs for the major exporters (Colombia, Costa Rica, Panama and

Peru) are compared with their recent export volumes to the EU, it becomes clear that those for Colombia, the largest exporter to the EU among the four, are much less generous than those for the other three countries. In fact the TIV in 2010 equals 109% of average exports to the EU in 2007-2008-2009 for Colombia, 117% for Costa Rica, 135% for Panama and 173% for Peru. In addition, not only has Peru (the smallest, by far, of the four players) the most generous TIV in 2010 with respect to its historical exports to the EU, but its TIVs expand between 2010 and 2020 by 50%, while those of all other seven countries increase by 45% only.

The possible limits of the negotiation space for Ecuador's TIVs could possibly be the outcomes obtained by receiving, at one end, a treatment similar to that granted to Peru (TIV in year one of the implementation period equal to 173% of Ecuador's average exports to the EU in the most recent three year period, and a TIV at the end of the implementation period equal to 150% of that in the first year), and, at the other end, a treatment similar to that granted to Colombia (TIV in year one of the implementation period equal to 109% of average exports to the EU in the most recent three year period, and a TIV at the end of the period equal to 145% of that in the first year). These two extreme scenarios are represented in figure 31. However, Ecuador being a very large and competitive exporter, it is unlikely that the EU would be ready to consider granting it provisions similar to those granted to Peru.

6. OTHER FACTORS AFFECTING THE COMPETITIVENESS OF ECUADOR'S BANANA EXPORTS TO THE EU MARKET

The conclusion which has emerged is that trade policy changes in the banana market certainly do matter. The TAs concluded by the EU with Colombia, Peru and the Central American countries in the short run (between now and 2020) will have a small, gradually increasing, impact on Ecuador's banana exports and export prices. From 2020 the negative impact of the TAs on the competitiveness of Ecuador's banana exports on the EU market will be significant, because of both, the magnitude of the preferential margin enjoyed by that time by the eight countries benefitting from the TAs and the 'safeguard' clause being no longer applied. This, conversely, implies that the benefits for Ecuador's banana industry of reaching a trade agreement with the EU similar to those signed in 2010 by Colombia, Peru and the Central America countries will be small during the implementation period, but will become sizeable after then. In addition, it is important to recognise that the preferential gap in the tariff faced on the EU market would increase the competitiveness of Ecuador's banana exports vis a vis exports from the Philippines, which are subject to the MFN import regime.

Having said that, the final section of the paper is devoted to a brief discussion of factors different from the EU import regime which are relevant in determining the competitiveness of Ecuador banana exports to the EU market.

The euro/$ exchange rate. Since the introduction of the euro, its exchange rate with the US$ has been subject to wide fluctuations and changes in medium term trend (figure 32). Structural changes in this exchange rate will obviously affect Ecuador's volumes exported and prices received (on the EU market as well as on other markets, being, as discussed above, Ecuador's export banana markets well integrated).

Product differentiation, including organic and fair trade bananas. Based on past developments, there is no reason to expect the expansion of banana consumption, both in the EU and worldwide, not to continue in the years to come. Hence, the issue of competitiveness of Ecuadorian bananas relative to that of other exporters relates to its implications in terms of market share of a growing market. The vast majority of EU consumers are unable today to identify the country of origin of the bananas they consume. The multinationals which control the market of bananas are very careful to protect the value of their own branding from the emergence of preferences by consumers based on the country of origin of bananas. In other words, for EU consumers today "a banana is a banana", while a banana from Chiquita, for some consumers at least, is different from a banana by Del Monte or Dole.[10] If Ecuador were able to convince a significant share of consumers that its bananas were different and better than those of other origins, this would give them a competitive margin on the market, leading to a larger market share and/or a price premium (the actual result would depend on the strategic behaviour adopted to exploit the benefits deriving from product differentiation). Product differentiation is a necessary condition for the effectiveness of public and private market promotion and market development actions. Developing a product differentiation strategy based on the country of origin in the banana market is not easy, for several reasons, not least of which being in evident conflict with the strategic behaviours of the multinationals controlling a very large share of the banana market. However, there are examples of countries that have been able to implement product differentiation strategies based on other quality characteristics, namely certified organic and 'fair trade' bananas. The most evident example of the successful implementation of such a strategy is probably the Dominican Republic. Dominican Republic exports to the EU increased from 60,000 tonnes in 2000 to over 300,000 in 2010, becoming the largest ACP exporter to the EU market, surpassing the two traditional main ACP exporters, Cameroon (243,000 tonnes) and

Cote d'Ivoire (244,000 tonnes). This tremendous expansion in exports is largely due to the fact that two thirds of Dominican Republic banana exports today are certified as being both organic and 'fair trade'. Although differences in agro-climatic conditions in Ecuador and Dominican Republic make producing a large share of organic bananas in Ecuador more problematic, Ecuador produces and exports today a volume of organic bananas much smaller than it could. Should Ecuador expand 'fair trade' banana production, this would bring benefits which go well beyond increasing the competitiveness of its banana exports in the EU market; it would provide an important additional push to improve compliance to existing laws in the area of farm employee working conditions, wages received and social security coverage. While a significant expansion of organic and 'fair trade' bananas is likely to generate private benefits mostly in terms of volumes exported (the price premium received is likely to be not much higher than what is needed to cover additional costs and higher production risks involved in 'organic' practices), benefits will extend beyond those of the private entities involved. First of all, 'fair trade' bananas are, because of the specific nature of this 'quality characteristic', associated to their country of origin, and this will help build a positive image with EU consumers of the entire Ecuadorian banana industry, which today suffers from the concerns systematically raised regarding farm working conditions and possible use of child labour. Second, benefits may flow even outside the boundaries of the banana industry, because consumer perception of the Ecuadorian banana industry being linked to organic and 'fair trade' production will have positive spill-over effects on the image of Ecuador as a country strongly committed to the environment, with direct benefits also for the demand for tourist services.

Productivity in banana production and quality of domestic logistic infrastructures. Productivity and the efficiency of logistic infrastructures of the banana industry in Ecuador obviously directly affect costs of production and handling, and, in turn, competitiveness of Ecuadorian banana exports. Based on available information as well as on the opinions expressed by actors I had the opportunity to speak with, significant margins of improvement exist for both factors. Surprisingly, despite the economic and social importance of the banana industry for Ecuador, very little has been invested, both by private and public actors, in the development of improved environmentally and socially sustainable production technologies, and in facilitating the adoption of more productive environmentally and socially sustainable production technologies which are already available. The public sector should consider developing a 'research & development plan' for the banana sector, to support research activities as well as actions meant to facilitate the adoption by farms of new and existing improved sustainable production technologies. Analogously, the need emerges for an assessment of existing infrastructures specifically relevant for the banana industry, in order to identify interventions to fill gaps, if any, and improve the stock of existing infrastructure, in order to reduce domestic handling costs of bananas.

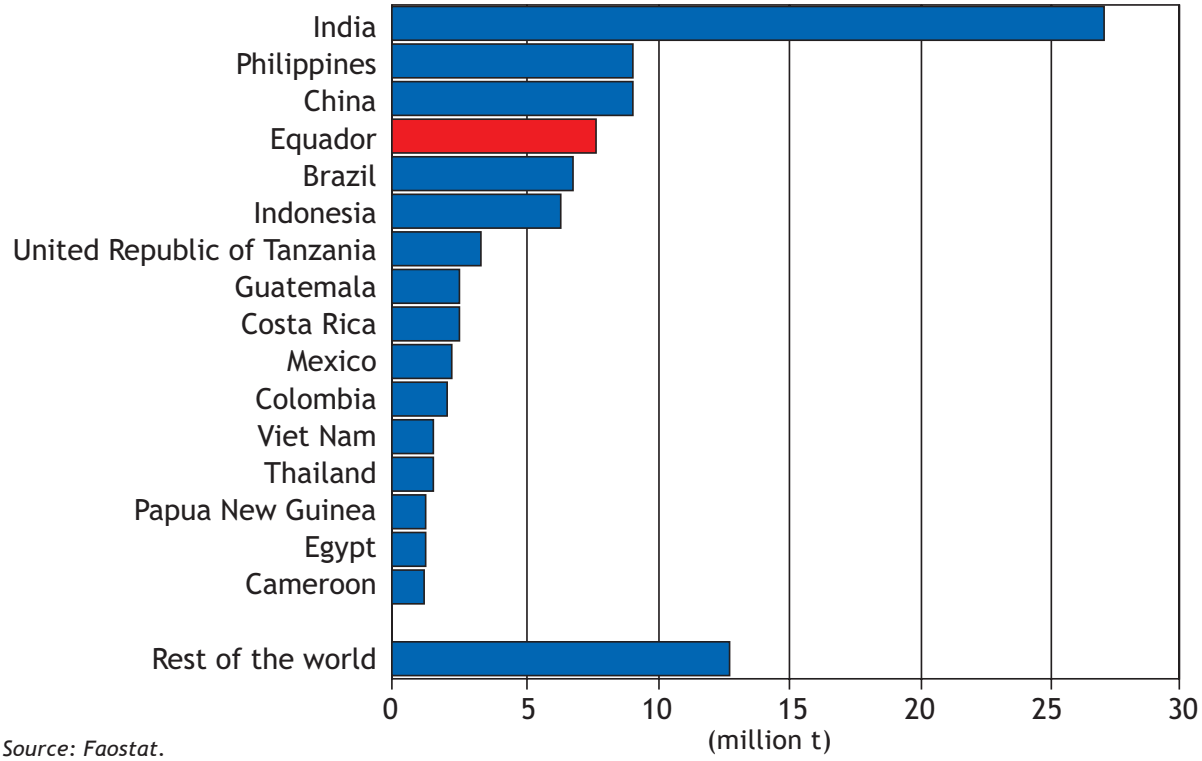
Distribution of power along the banana market chain. The quantification of both (a) potential total benefits for the Ecuadorian banana industry deriving from a TA with the EU similar to those reached by Colombia, Peru and the Central American countries in 2010, and (b) the distribution of these benefits among the main domestic social groups involved (i.e. workers, farm owners, exporters) cannot be performed without an assessment of (formal and informal) contractual terms regulating exchanges of goods and services among them (and, in the case of the exporters, of those between them and downstream agents, such as traders, providers of transportation services and importers). In the absence of information on the distribution of market power along the chain of Ecuadorian banana production and trade any policy decision, regardless of it being related to trade or domestic interventions, will be ill-informed, because the implications of the alternatives being considered and of the decision eventually made will be imprecisely assessed. This means that an effort should be

made to identify, at least in general terms, formal and informal 'rules' governing prices paid and received in the exchanges of goods and services along the market chain of Ecuadorian bananas.

Other factors outside the area of possible public intervention by the Ecuadorian Government. Other important factors which will affect the competitiveness of Ecuadorian banana exports on the EU market include developments in international transportation technologies and costs, developments in the degree of concentration and in buying and pricing strategies by the retail sector, and structural changes in international banana trading. All these factors fall largely outside the area of possible direct intervention by Ecuador's policy makers.

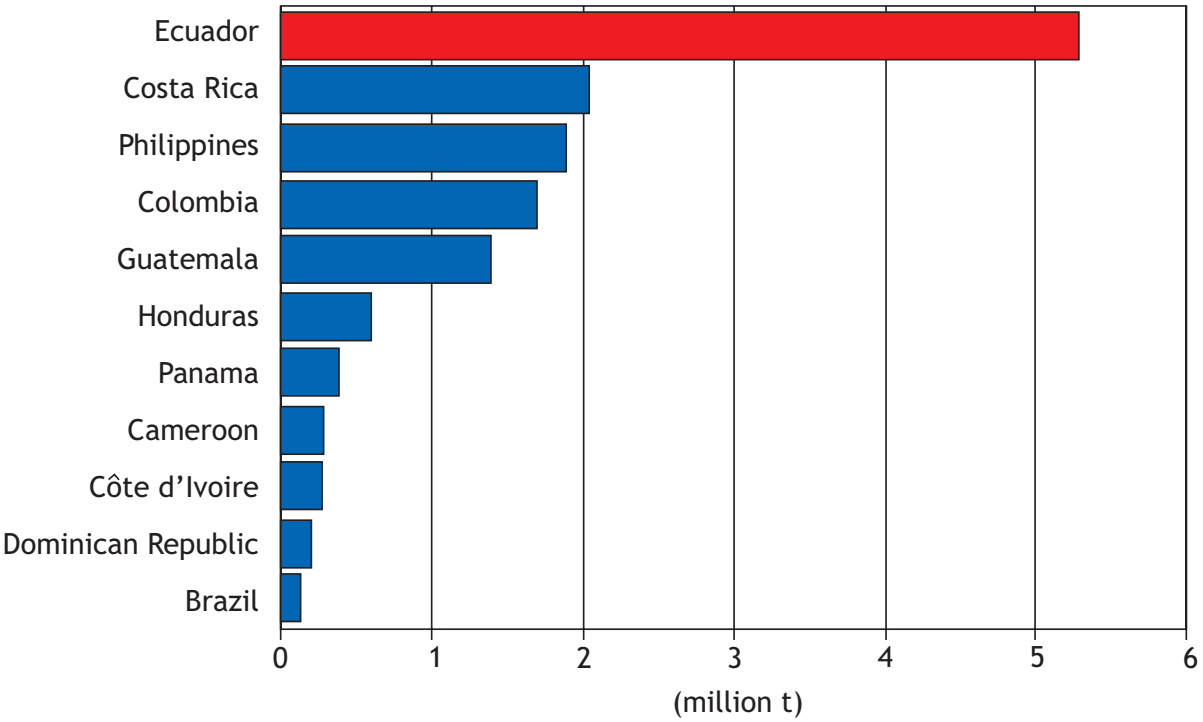
A final consideration refers to the more general issue related to the design of public policy interventions for the banana industry. Current and potential public policy interventions in this sector in Ecuador include very different policy instruments and touches very different aspects of banana production and trade: from fiscal policies (at the farm and border level), to regulating contractual terms of domestic banana trade by fixing the minimum price per box of bananas to be paid by exporters to producers; from regulating farm obligations to its employees in terms of working conditions, minimum wages and social security coverage, to investments in research and development activities; from increasing efforts for an effective implementation of existing regulations (a relevant policy decision per se), to investing in domestic physical infrastructures or in market specific promotion or development plans. Because of the economic and social relevance of the banana industry in Ecuador, there is a need to develop an 'integrated policy action plan', defined under the sole responsibility of the Government but developed with the involvement of all relevant social actors. This plan should first identify the public goals to be achieved; then draw up all public policy interventions relevant for the banana industry to be implemented (current interventions; modified ones, if required; innovative ones) in a single integrated and coherent plan of policy action; finally, identify the contribution expected by the public sector as well as each of the social groups involved. Only if defined and implemented within a concerted, coherent single plan of action, can public policy interventions be effective and efficiently implemented to reach the stated public goals.

Figure 1. Bananas. Main Producing Countries (million t; 2009)



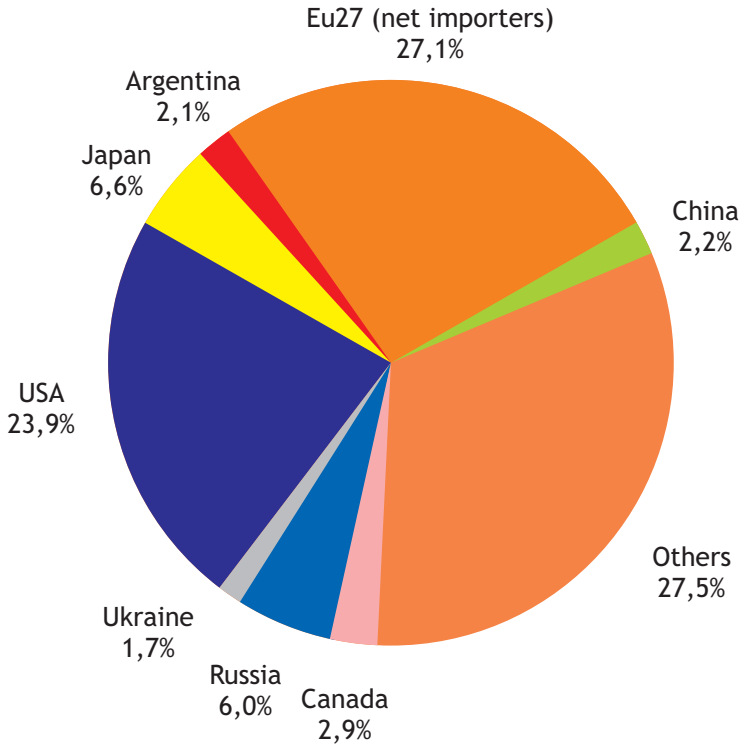
Source: Faostat.

Figure 2. Bananas. Main exporting countries (net exports; million t; 2008)



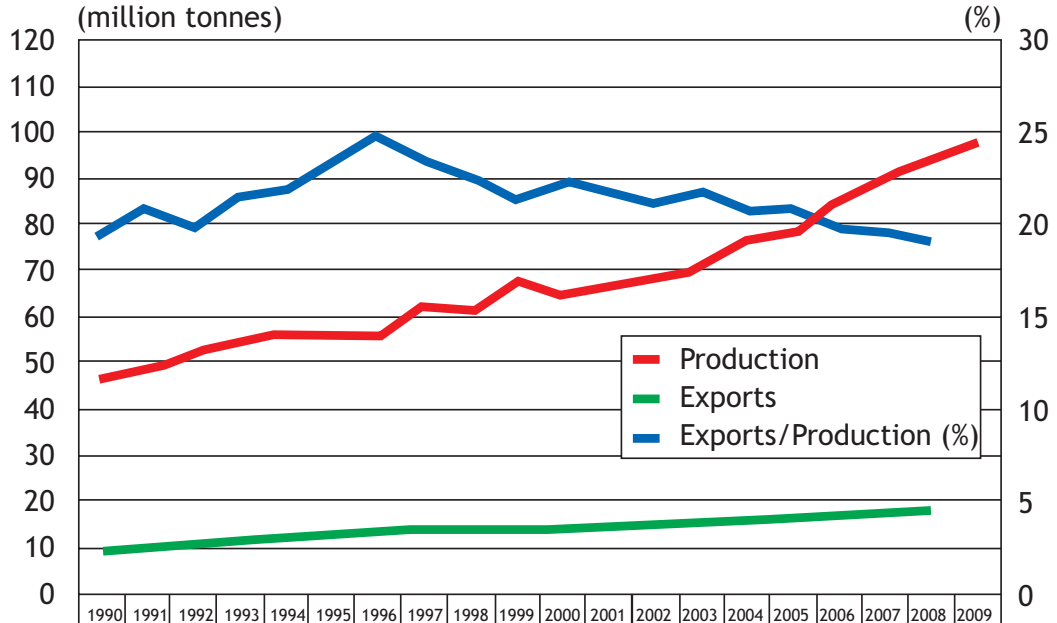
Source: Faostat.

Figure 3. Banana importers' shares of world market (2008; %)



Source: Faostat.

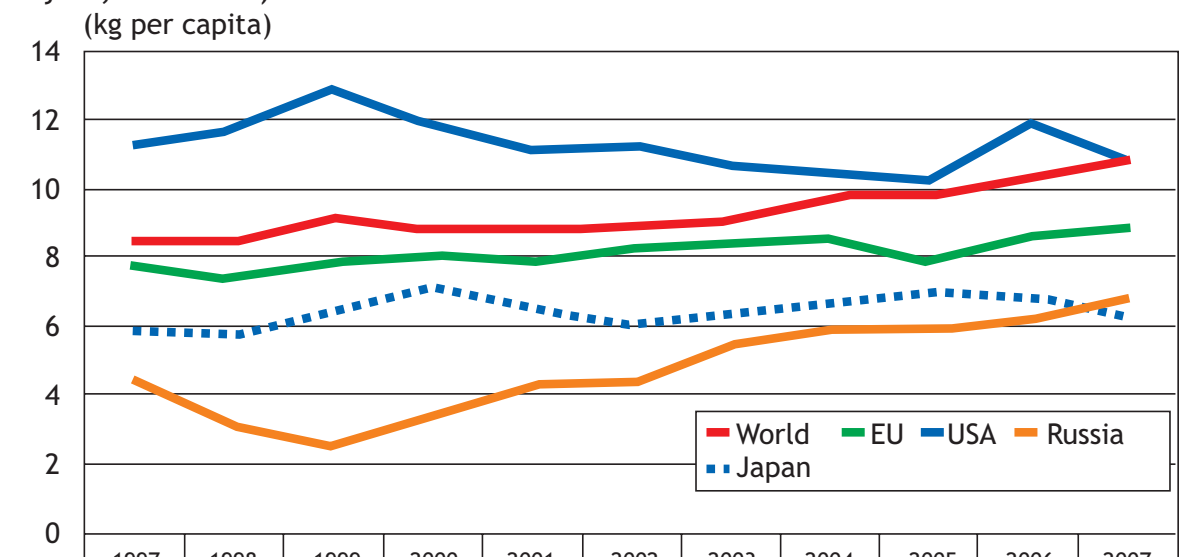
Figure 4. Bananas. World production, exports and exports as a percentage of production [million t; 1990-2009 (production); 1990-2008 (exports)]



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Production	46,8	48,6	51,6	53,8	56,1	56,6	55,9	61,8	61,7	66,9	65,1	66,8	68,1	70,5	75,9	78,9	85,4	89,8	93,8	97,4
Exports	9	10,1	10,3	11,4	12,3	13,2	13,9	14,5	13,9	14,3	14,3	14,6	14,5	15,2	15,8	16,2	16,8	17,6	18	
Exports/Production (%)	19,3	20,8	19,9	21,2	21,9	23,3	24,9	23,5	22,6	21,4	22	21,8	21,3	21,6	20,8	20,6	19,7	19,6	19,2	

Source: Faostat.

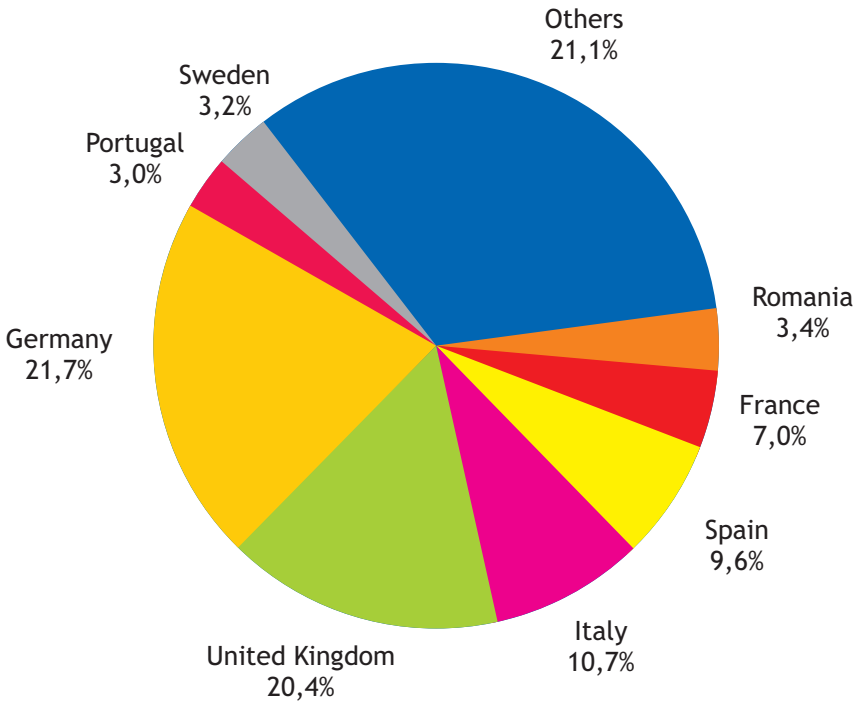
Figure 5. Bananas. World, EU, USA, Russia and Japan. Per capita consumption (kg per capita per year; 1997-2007)



	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
World	8,4	8,4	9	8,8	8,8	8,9	9	9,6	9,8	10,4	10,8
EU	7,7	7,4	7,8	8	7,8	8,2	8,4	8,5	8	8,6	8,9
USA	11,3	11,7	12,8	11,8	11,1	11,2	10,7	10,5	10,3	11,9	10,8
Russia	4,4	3,2	2,5	3,4	4,2	4,4	5,4	5,9	5,9	6,2	6,8
Japan	5,8	5,7	6,5	7,1	6,5	6,1	6,4	6,7	6,9	6,8	6,3

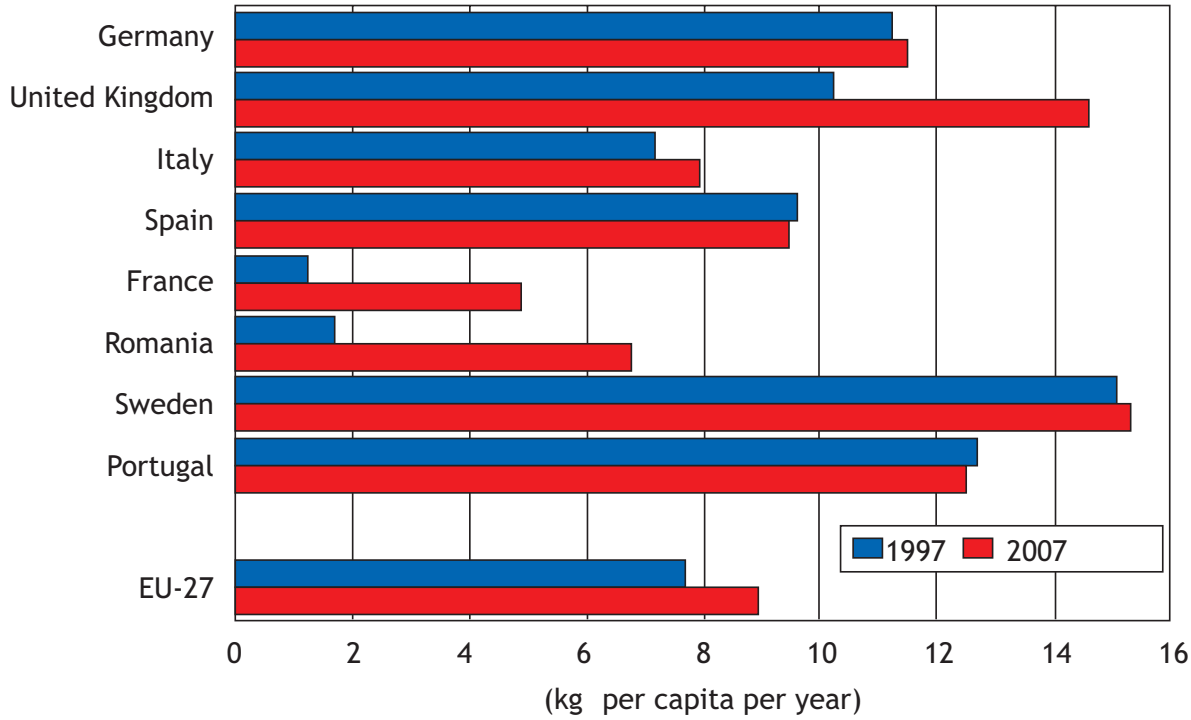
Source: Faostat.

Figure 6. EU-27. Consumption by member state (2007; %)



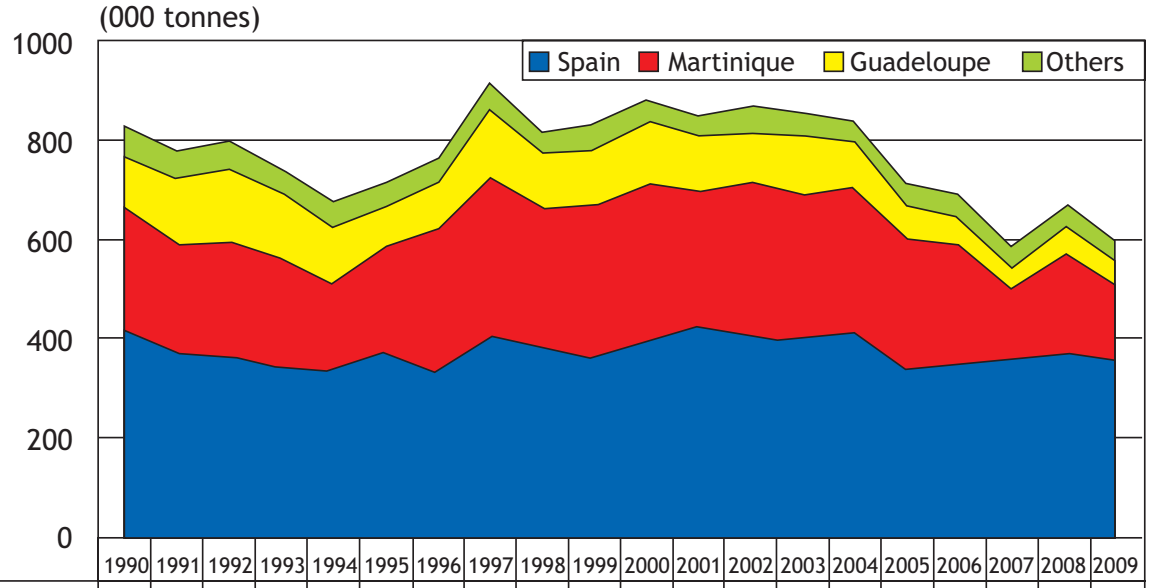
Source: Faostat.

Figure 7. European Union. Per capita yearly consumption of bananas in selected member states (2007; kg)



Source: Faostat.

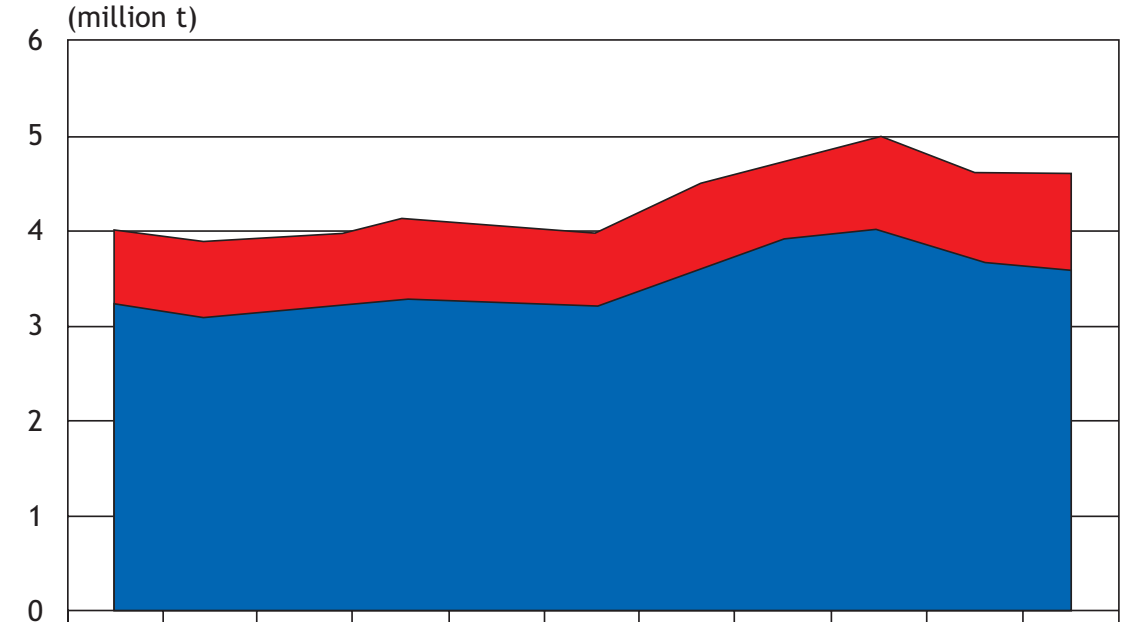
Figure 8. European Union. Banana production (1990-2009; 000 tonnes)



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Eu27	825	783	798	745	679	715	762	917	822	837	881	848	862	855	839	712	692	588	667	598
Others	61	56	51	49	52	46	48	49	47	52	42	40	46	42	43	40	43	41	40	39
Guadeloupe	102	133	148	134	116	82	87	141	108	115	126	110	100	121	89	67	55	45	52	50
Martinique	246	221	231	214	173	210	291	321	282	305	316	276	307	290	289	260	246	144	204	150
Spain	416	373	368	348	338	377	336	406	385	365	397	422	409	402	418	345	348	358	371	359

Source: Faostat.

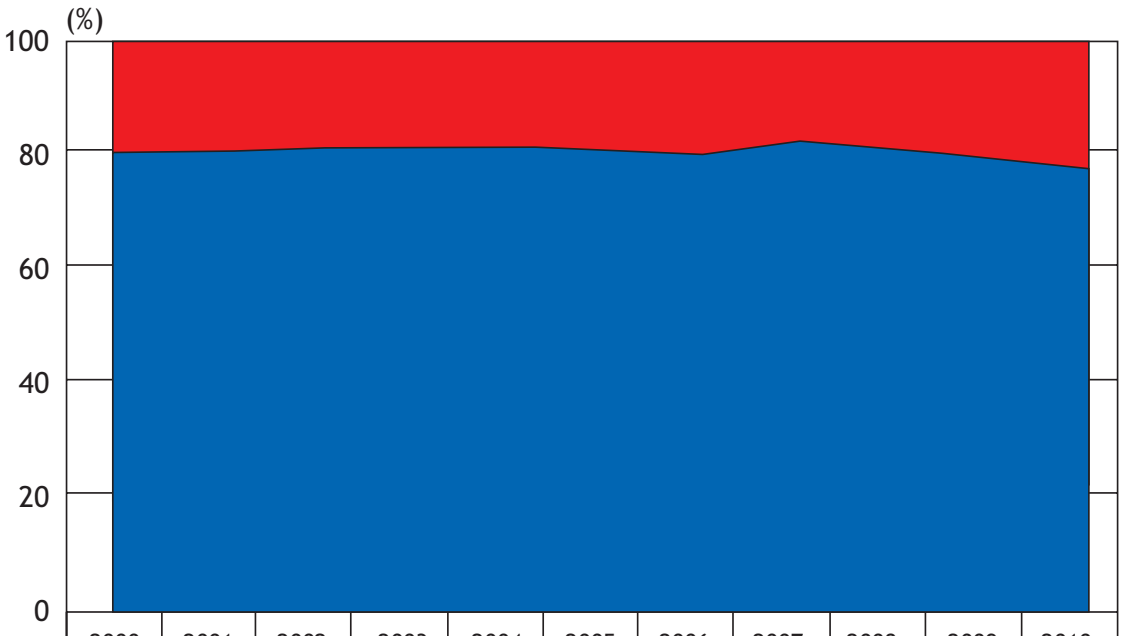
Figure 9. Bananas. EU-27 imports (extra-EU trade only) from MFN and ACP countries (million t; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total ACP	0,772	0,749	0,74	0,803	0,783	0,764	0,89	0,843	0,919	0,959	1,024
Total MFN	3,22	3,128	3,204	3,319	3,282	3,219	3,559	3,921	4,041	3,663	3,573

Source: Eurostat

Figure 10. Bananas. EU-27 imports (extra-EU trade only) from MFN and ACP countries (market shares; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
ACP (%)	19,3	19,3	18,8	19,5	19,3	19,2	20	17,7	18,5	20,7	22,3
MFN (%)	80,7	80,7	81,2	80,5	80,7	80,8	80	82,3	81,5	79,3	77,7

Source: Eurostat

Figure 11. EU import tariffs for bananas under the different import regimes (euro/tonne)

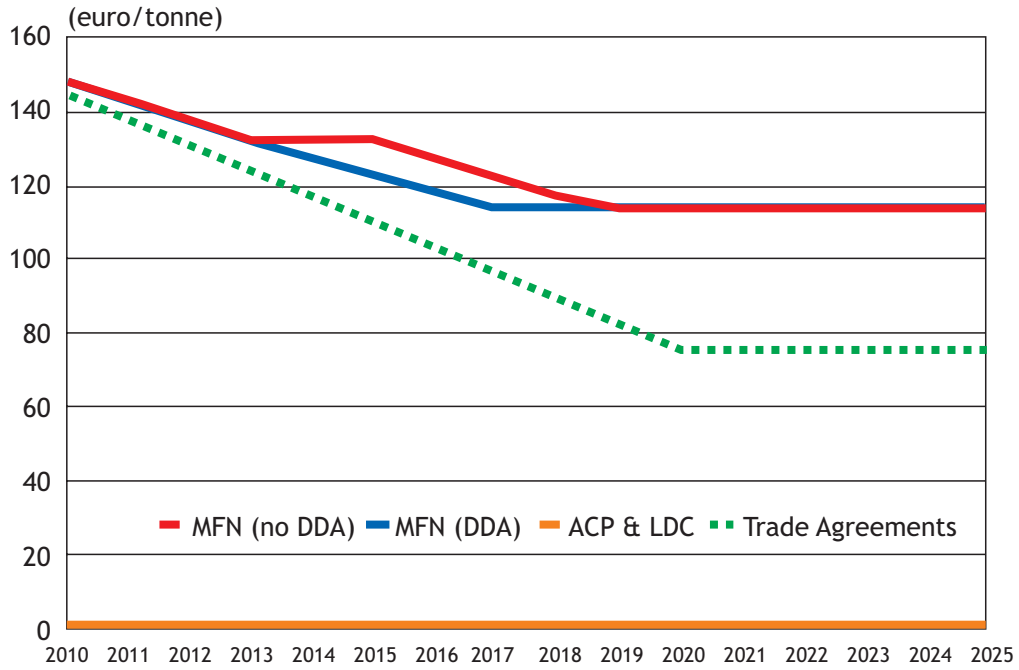
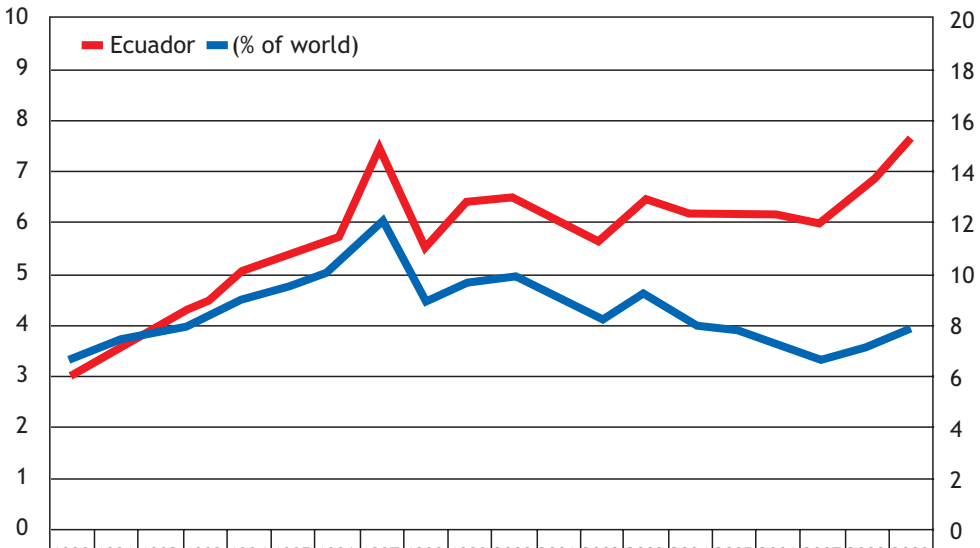


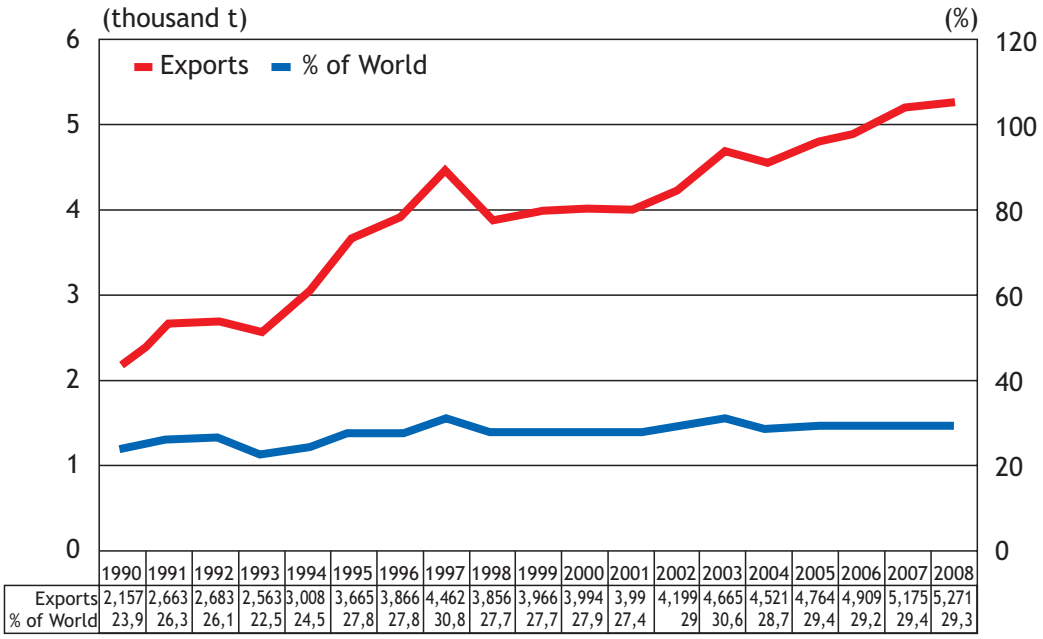
Figure 12. Bananas. Ecuador, production (million t; % of world production; 1990-2009)



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Ecuador	3,05	3,53	3,99	4,42	5,09	5,4	5,73	7,49	5,46	6,39	6,49	6,08	5,61	6,45	6,13	6,12	6,13	6	6,7	7,64
(% of world)	6,5	7,3	7,7	8,2	9,1	9,5	10,2	12,1	8,9	9,6	9,9	9,1	8,2	9,2	8,1	7,8	7,2	6,7	7,1	7,8

Source: Faostat.

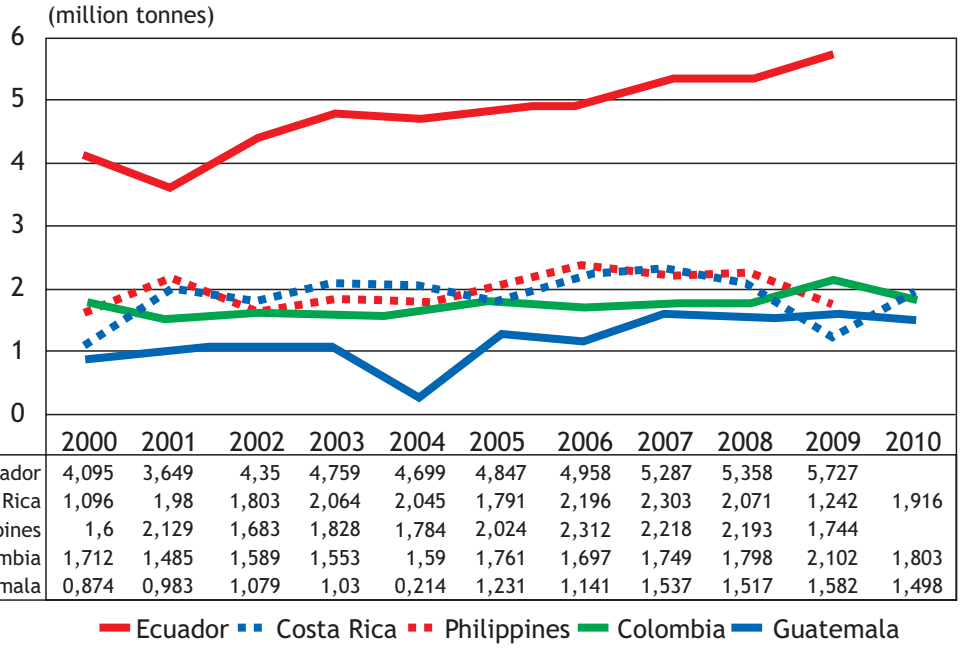
Figure 13. Bananas. Ecuador, exports (thousand t; % of world exports; 1990-2008)



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Exports	2,157	2,663	2,683	2,563	3,008	3,665	3,866	4,462	3,856	3,966	3,994	3,99	4,199	4,665	4,521	4,764	4,909	5,175	5,271
% of World	23,9	26,3	26,1	22,5	24,5	27,8	27,8	30,8	27,7	27,7	27,9	27,4	29	30,6	28,7	29,4	29,2	29,4	29,3

Source: Faostat.

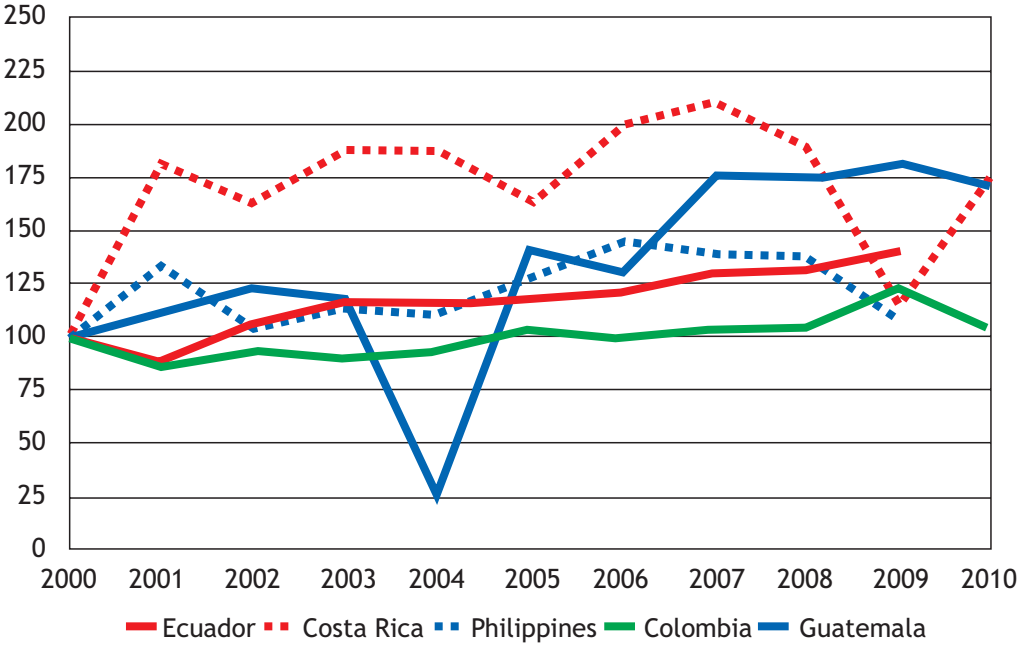
Figure 14. Exports by the main exporters (2000-2009/2010; million tonnes)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Ecuador	4,095	3,649	4,35	4,759	4,699	4,847	4,958	5,287	5,358	5,727	
Costa Rica	1,096	1,98	1,803	2,064	2,045	1,791	2,196	2,303	2,071	1,242	1,916
Philippines	1,6	2,129	1,683	1,828	1,784	2,024	2,312	2,218	2,193	1,744	
Colombia	1,712	1,485	1,589	1,553	1,59	1,761	1,697	1,749	1,798	2,102	1,803
Guatemala	0,874	0,983	1,079	1,03	0,214	1,231	1,141	1,537	1,517	1,582	1,498

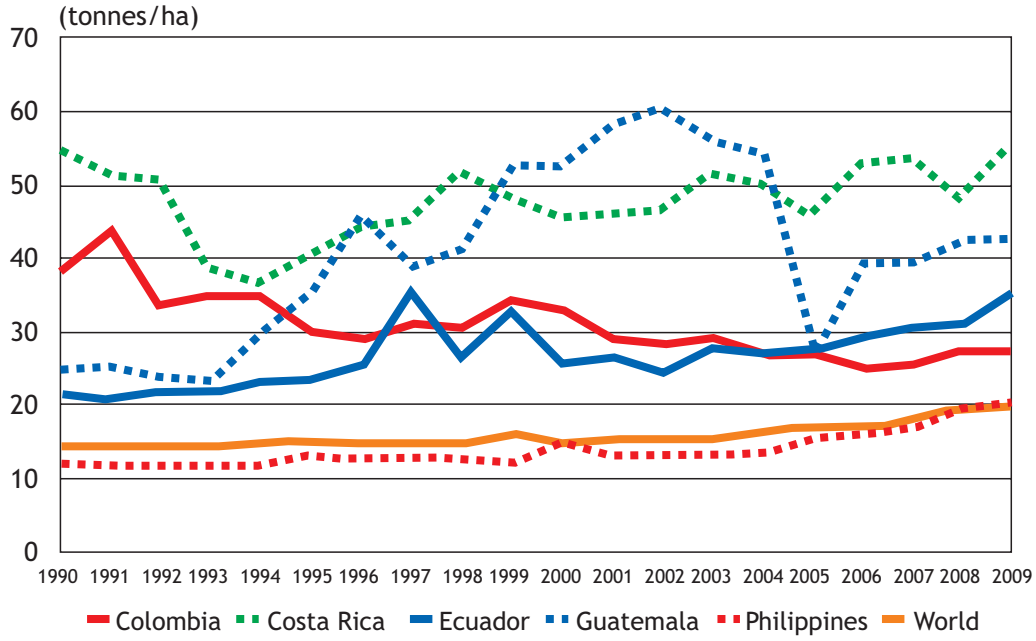
Source: Comtrade

Figure 15. Exports by the main exporters (2000-2009/2010; 2000=100)



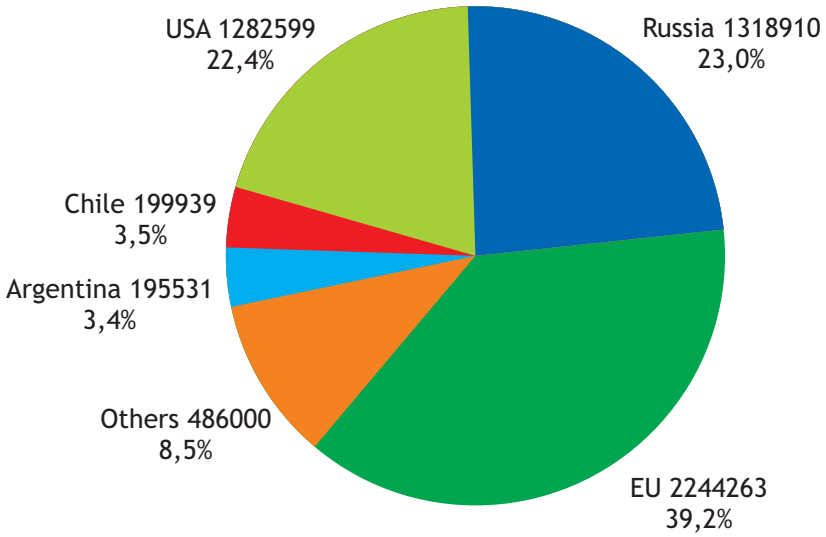
Source: Comtrade

Figure 16. Land productivity in banana production (1990-2009; tonnes/ha)



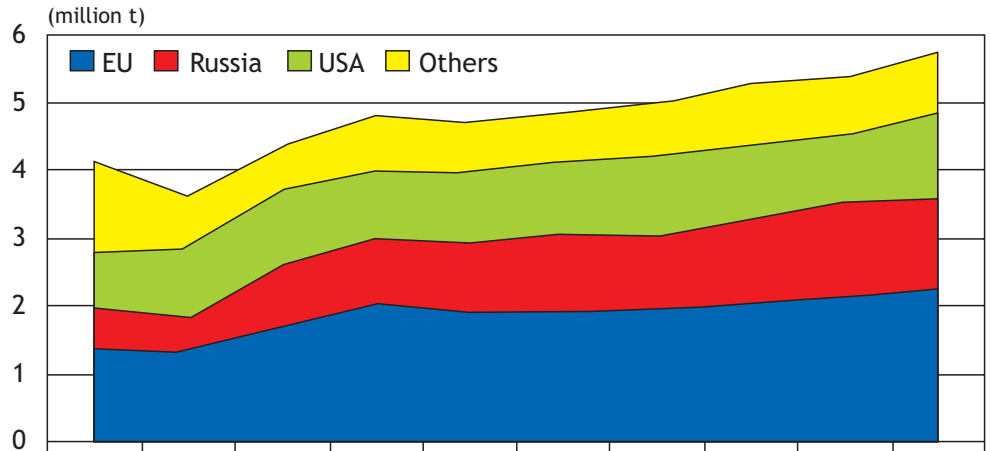
Source: Faostat

Figure 17. Ecuador. Banana exports by country of destination (t; %; 2009)



Source: Comtrade

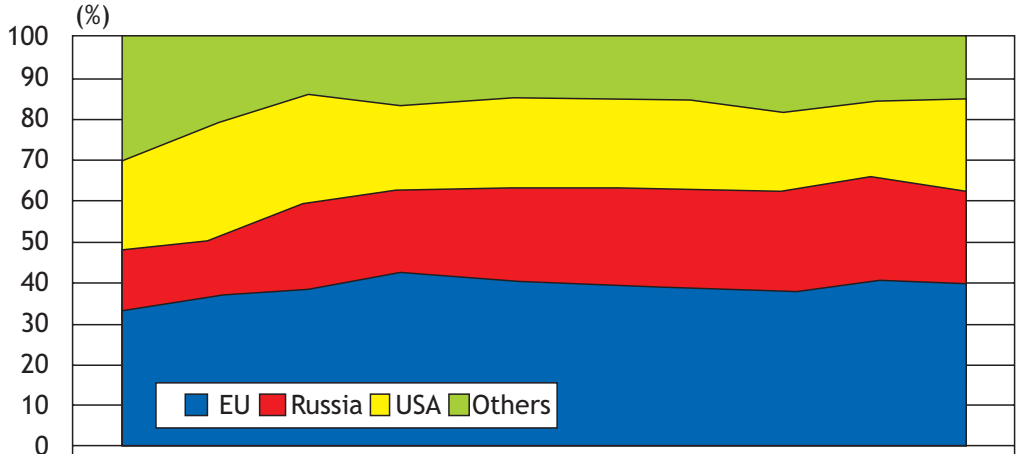
Figure 18. Ecuador. Banana exports by country of destination (million t; 2000-2009)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Others	1,284	0,776	0,641	0,776	0,734	0,736	0,746	0,965	0,842	0,881
USA	0,887	1,024	1,129	1,001	1,011	1,051	1,151	1,035	0,99	1,283
Russia	0,548	0,492	0,875	0,974	1,033	1,145	1,118	1,27	1,397	1,319
EU	1,379	1,357	1,706	2,008	1,921	1,915	1,943	2,017	2,128	2,244

Source: Comtrade

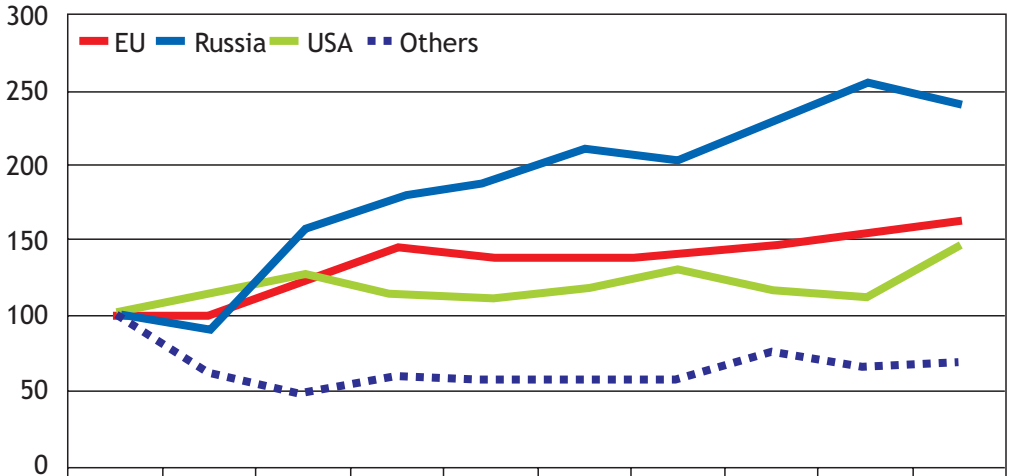
Figure 19. Ecuador. Banana exports by country of destination (%; 2000-2009)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Others	31,4	21,3	14,7	16,3	15,6	15,2	15	18,3	15,7	15,4
USA	21,7	28,1	25,9	21	21,5	21,7	23,2	19,6	18,5	22,4
Russia	13,4	13,6	20,1	20,5	22	23,6	22,5	24	26,1	23
EU	33,6	37,2	39,2	42,2	40,9	39,5	39,2	38,2	39,7	39,2

Source: Comtrade

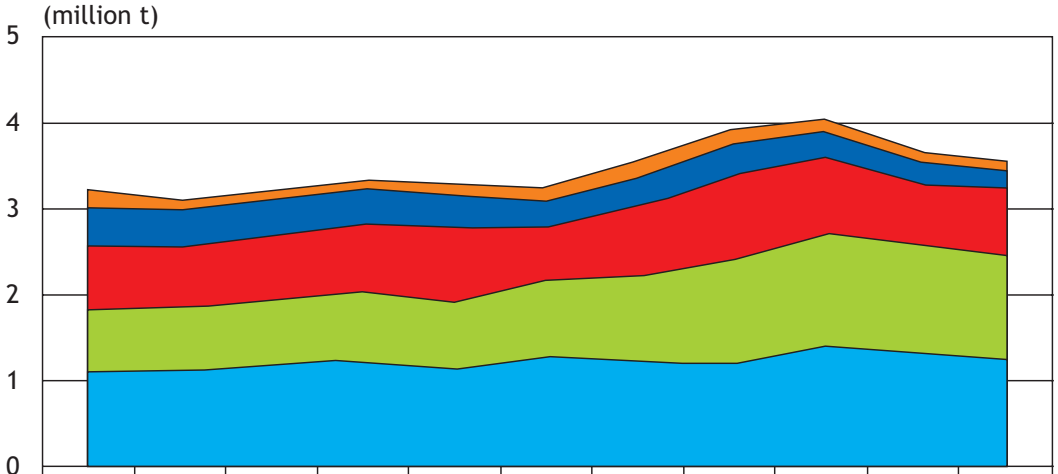
Figure 20. Ecuador. Banana exports by country of destination (2000=100; 2000-2009)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Others	100	60	50	60	57	57	58	75	66	69
USA	100	115	127	113	114	118	130	117	112	145
Russia	100	90	160	178	189	209	204	232	255	241
EU	100	99	124	146	140	139	141	147	155	163

Source: Comtrade

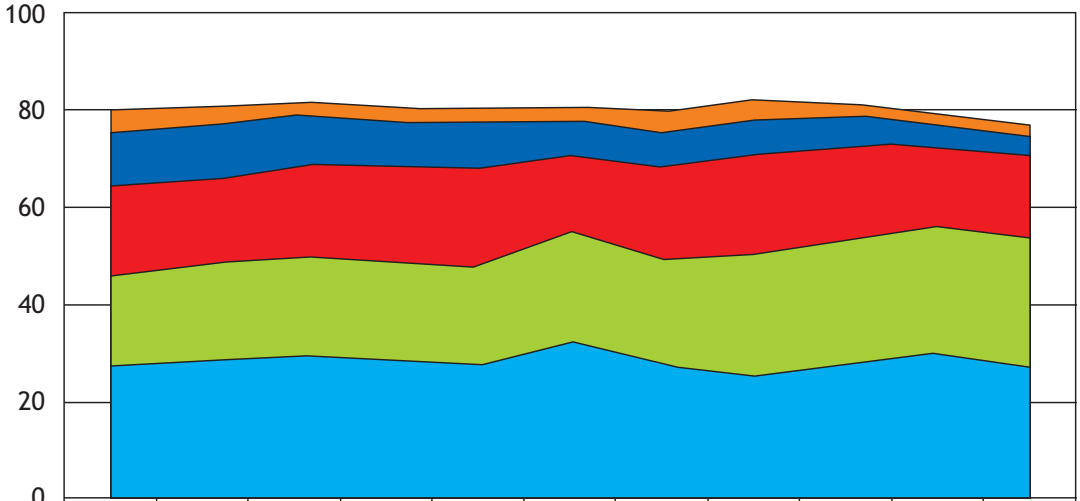
Figure 21. Bananas. EU-27 imports (extra-EU trade only) from MFN countries (million t; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total ACP	0,772	0,749	0,74	0,803	0,783	0,764	0,89	0,843	0,919	0,959	1,024
OTHER MFN	0,216	0,152	0,092	0,103	0,116	0,124	0,188	0,181	0,138	0,136	0,146
PANAMA	0,436	0,418	0,396	0,382	0,371	0,282	0,314	0,355	0,295	0,185	0,184
COSTA RICA	0,718	0,69	0,75	0,81	0,862	0,638	0,843	0,979	0,907	0,757	0,78
COLOMBIA	0,754	0,752	0,784	0,813	0,785	0,9	0,977	1,184	1,31	1,241	1,201
ECUADOR	1,097	1,116	1,182	1,211	1,149	1,276	1,237	1,222	1,39	1,344	1,262

Source: Eurostat

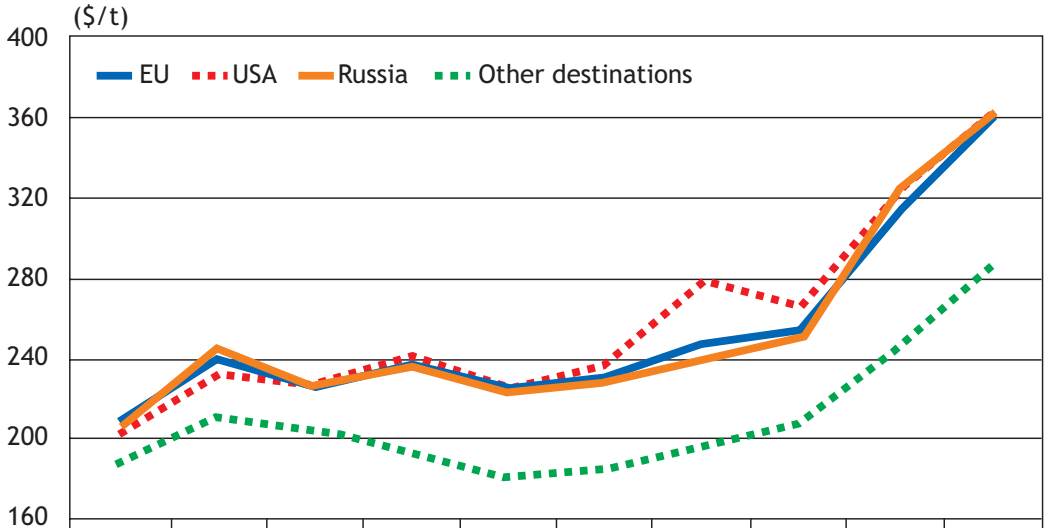
Figures 22. Bananas. EU-27 imports (extra-EU trade only) from MFN countries (market shares; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
OTHER MFN	5,4	3,9	2,3	2,5	2,8	3,1	4,2	3,8	2,8	2,9	3,2
PANAMA	10,9	10,8	10	9,2	9,1	7,1	7,1	7,4	5,9	4	4
COSTA RICA	18	17,8	19	19,6	21,2	16	18,9	20,5	18,3	16,4	17
COLOMBIA	18,8	19,4	19,9	19,7	19,3	22,6	22	24,8	26,4	26,8	26,1
ECUADOR	27,4	28,8	30	29,3	28,2	32	27,8	25,6	28	29,1	27,4

Source: Eurostat

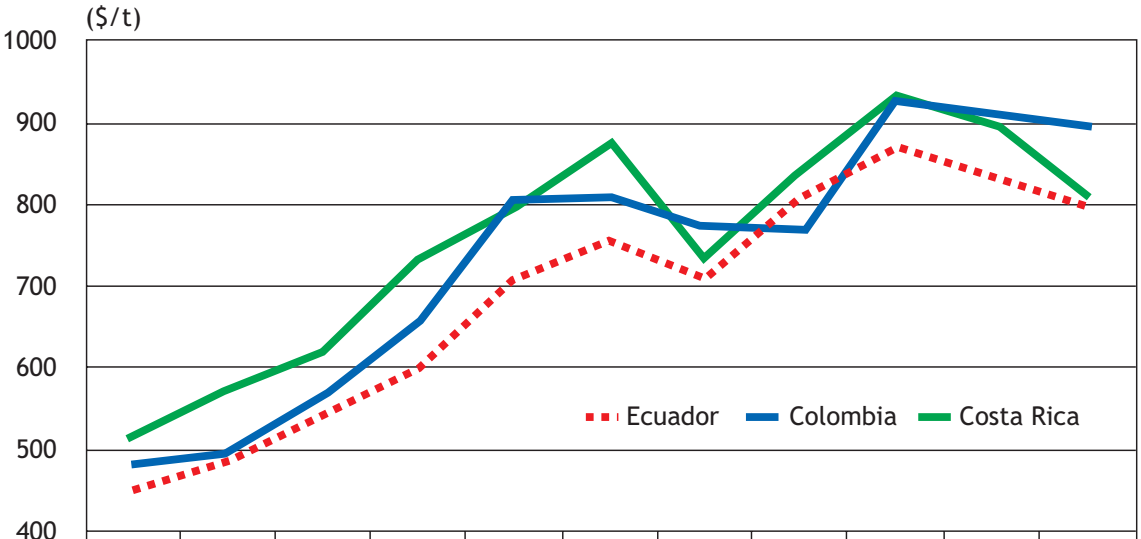
Figure 23. Ecuador. Average unit value of banana exports by country of destination, as reported by Ecuador (fob at its border; $/t; 2000-2009)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EU	207,3	239,4	225,4	237,5	224,6	229,2	246,6	253,4	310,7	358,5
USA	202,7	232	227,2	240,8	225,8	236,1	278,7	264,7	322	362,4
Russia	204,8	245,7	226,3	237,7	222,8	227,7	238,9	249,7	325,2	358,2
Other destinations	189,4	210,6	203,6	193,3	181,2	184,7	196,3	207,8	243,8	287,5

Source: Comtrade

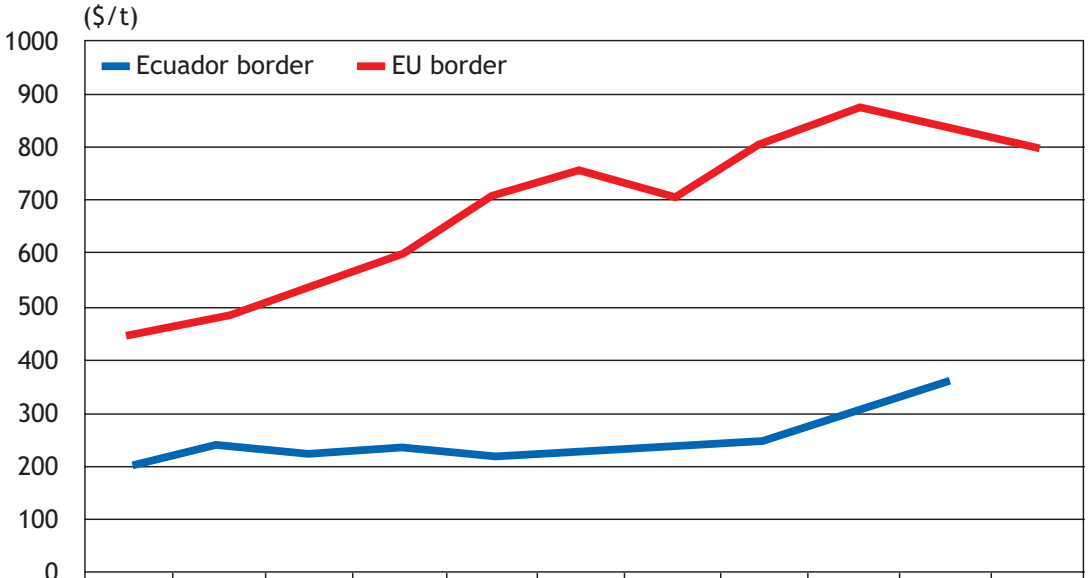
Figure 24. Ecuador, Colombia and Costa Rica. Average unit value of banana exports to the EU, as reported by the EU (cif at its border; $/t; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Ecuador	449,2	483,8	538	601,3	706,1	755,9	709,1	810,9	872,1	839,8	799,3
Colombia	482,4	498,9	566,2	657,6	804,7	810,2	769,1	766,4	925,3	908,8	894
Costa Rica	514,1	572,3	618,6	731,1	795,8	874,9	732,2	841,7	936,2	898,8	809,5

Source: Comtrade

Figure 25. Average unit value of Ecuador banana exports to the EU as reported by Ecuador (fob at its border) and by the EU (cif at its border) ($/t; 2000-2010)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Ecuador border	207,3	239,4	225,4	237,5	224,6	229,2	246,6	253,4	310,7	358,5	
EU border	449,2	483,8	538	601,3	706,1	755,9	709,1	810,9	872,1	839,8	799,3

Source: Comtrade

Figure 26. Preferential margins of Colombia, Peru and the Central American countries vis a vis Ecuador (euro/tonne; 2010-2025)

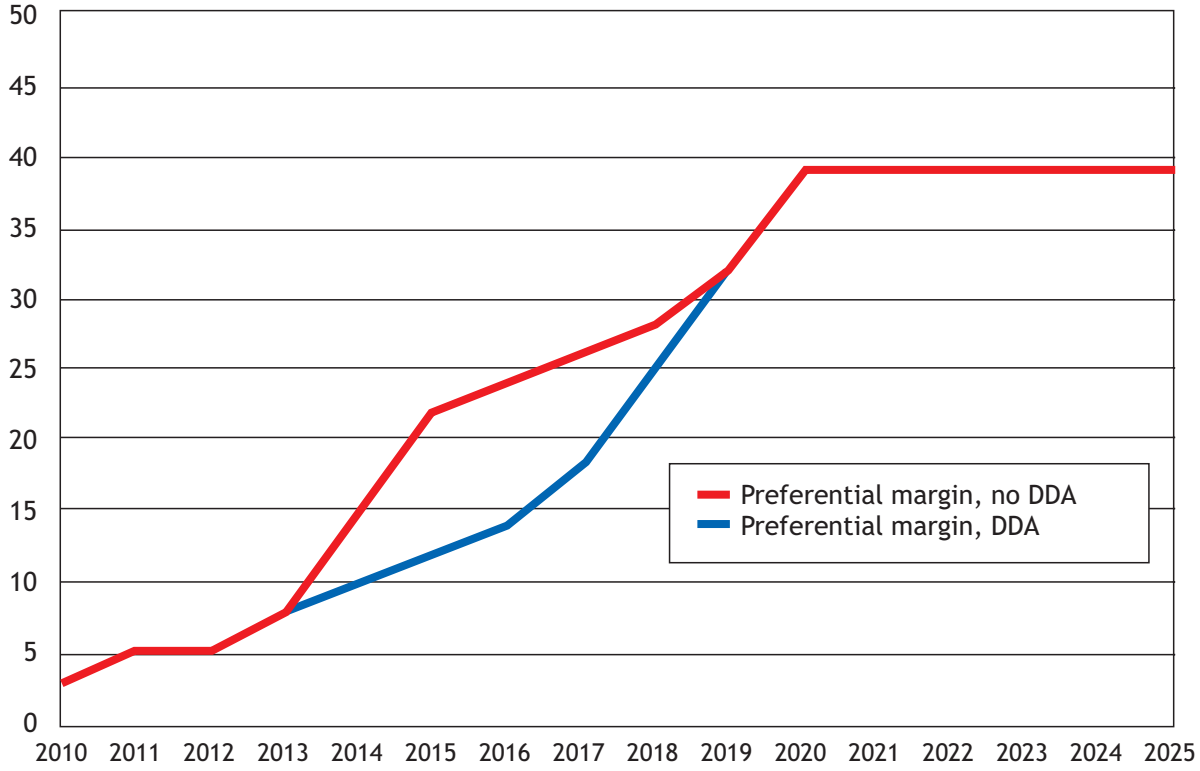
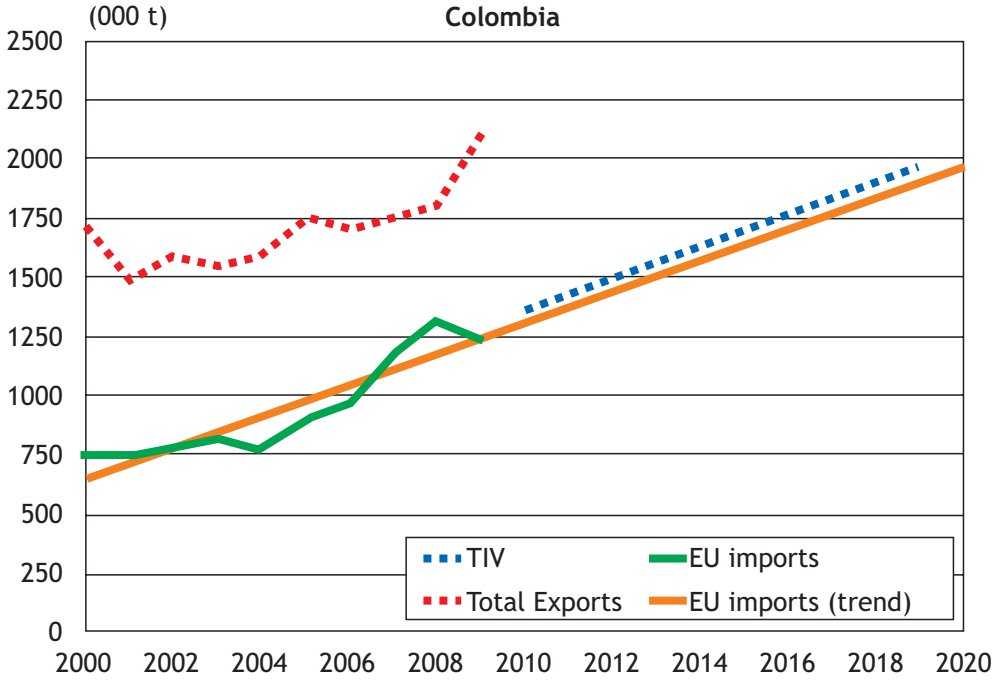
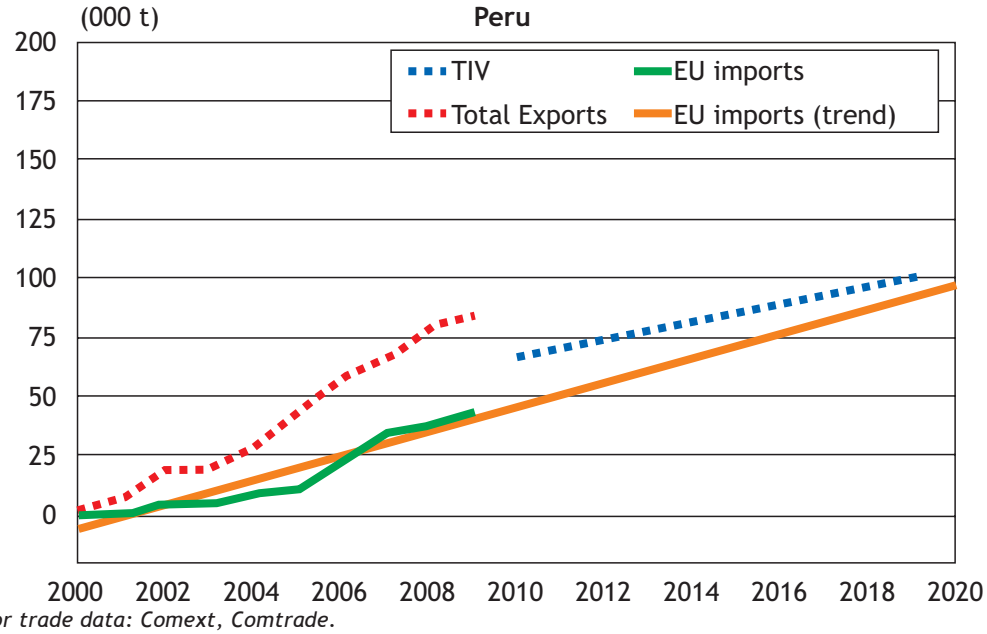


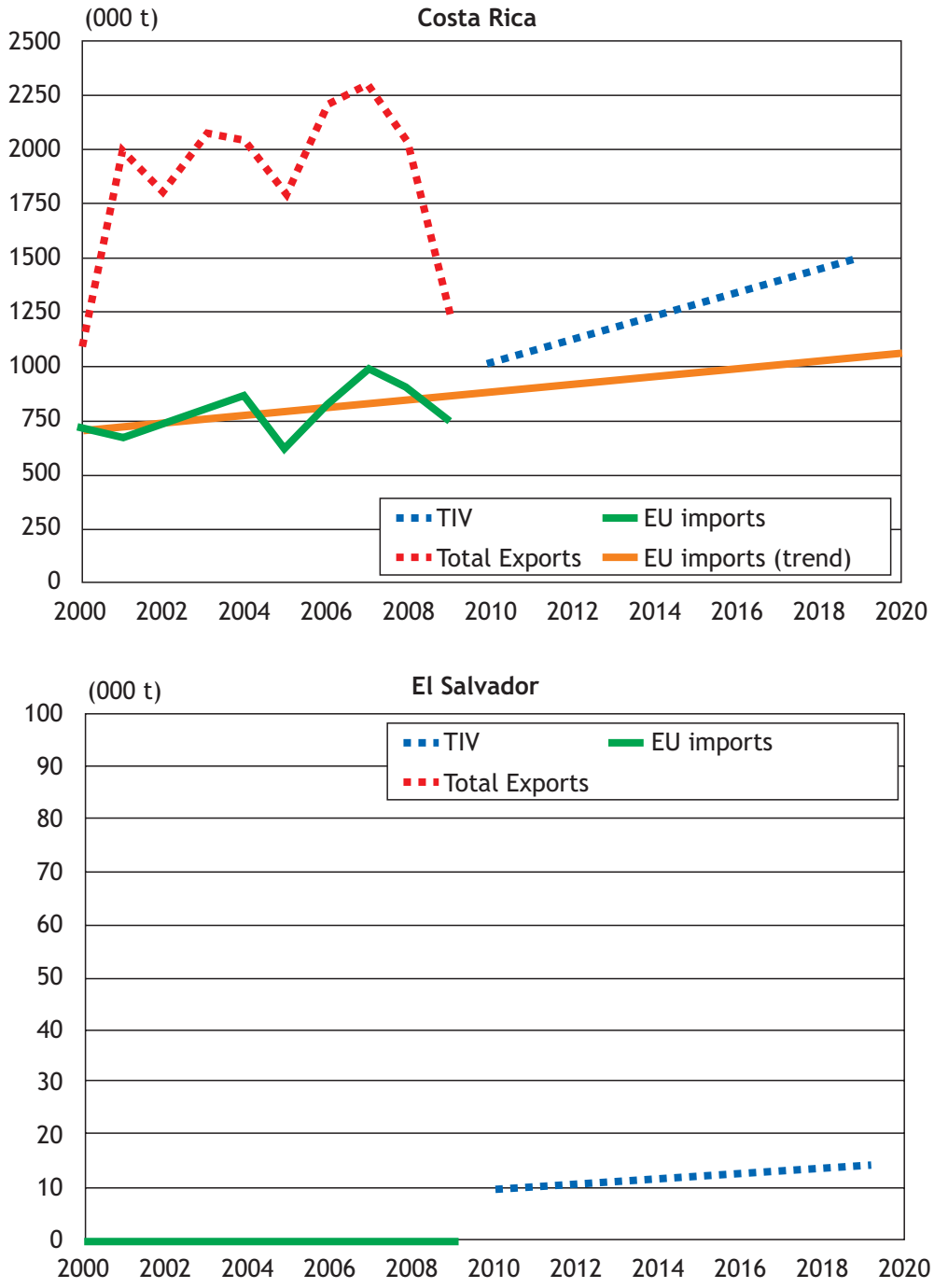
Figure 27. Colombia and Peru: banana exports to the EU-27, total banana exports (2000-2009) and 'trigger import volumes' (2010-2019)





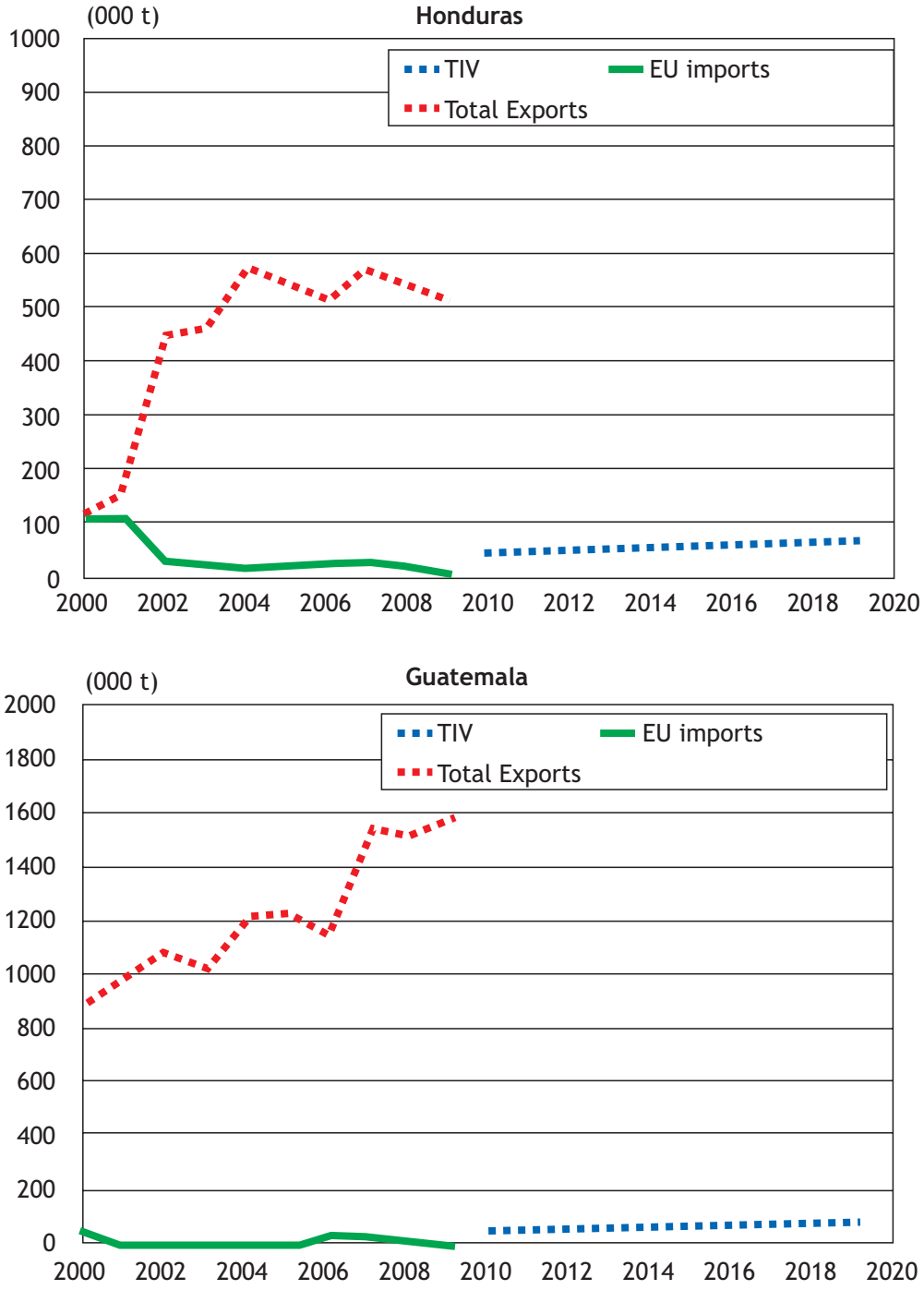
Source for trade data: Comext, Comtrade.

Figure 28. Costa Rica and El Salvador: banana exports to the EU-27, total banana exports (2000-2009) and 'trigger import volumes' (2010-2019)



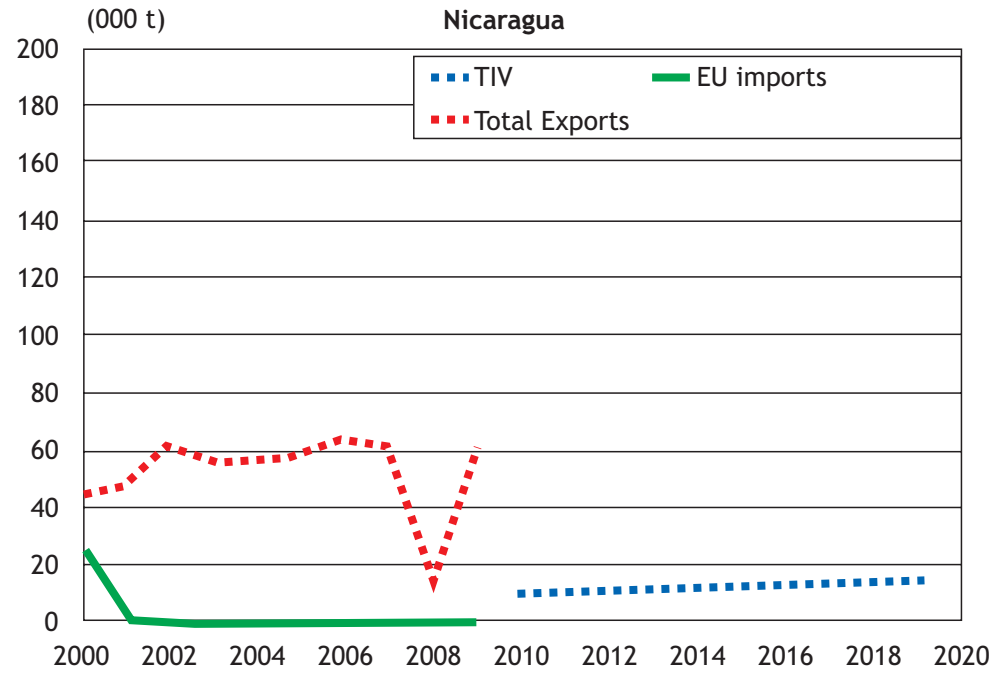
Source for trade data: Comext, Comtrade.

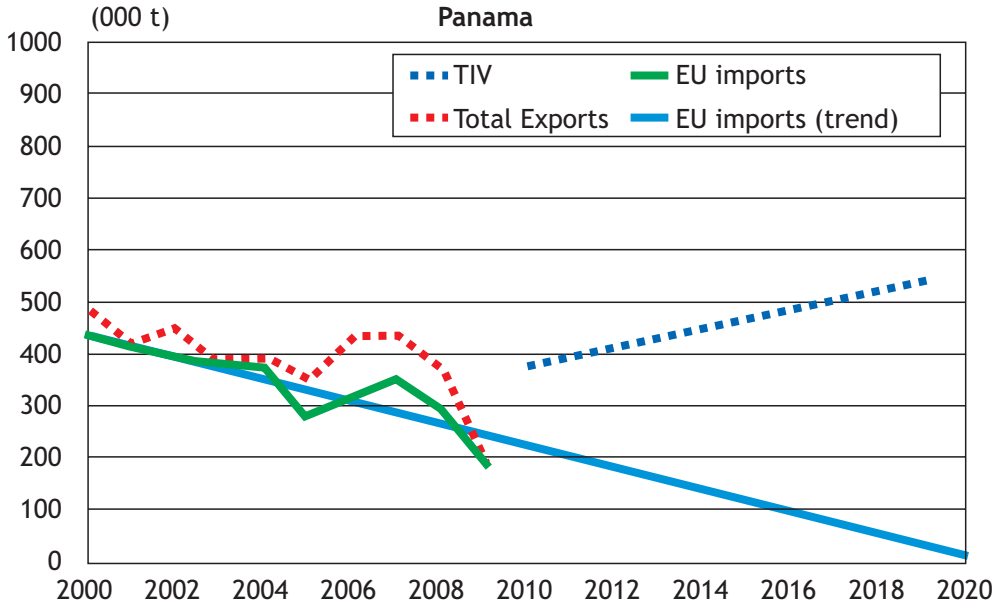
Figure 29. Honduras and Guatemala: banana exports to the EU-27, total banana exports (2000-2009) and 'trigger import volumes' (2010-2019)



Source for trade data: Comext, Comtrade.

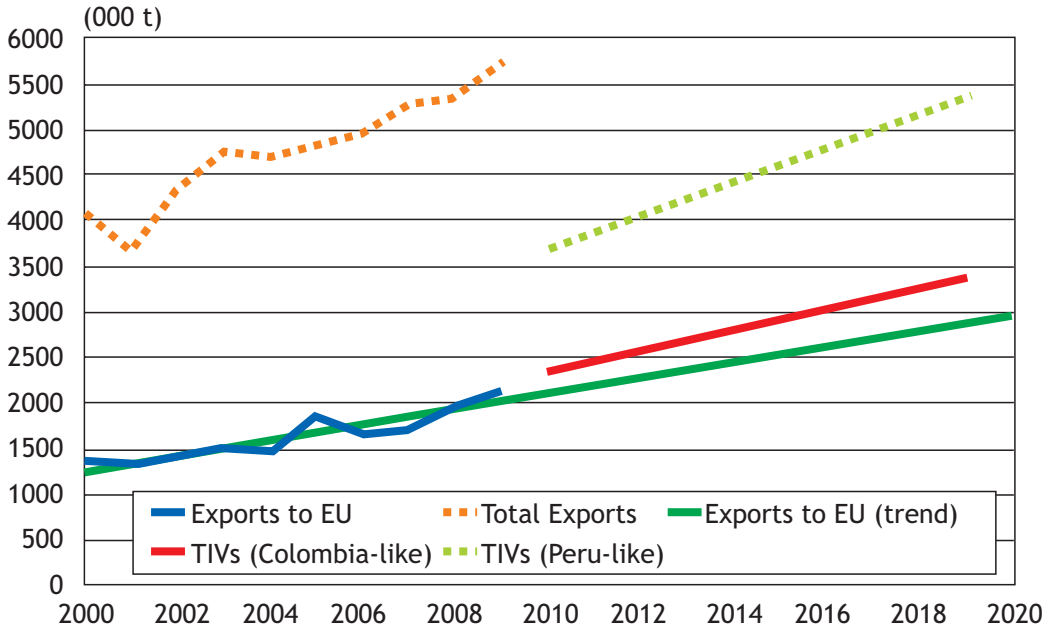
Figure 30. Nicaragua and Panama: banana exports to the EU-27, total banana exports (2000-2009) and 'trigger import volumes' (2010-2019)





Source for trade data: Comext, Comtrade (Faostat for Panama total banana exports in 2004).

Figure 31. Ecuador. Banana exports to the EU-27, total banana exports (2000-2009) and likely range for the 'trigger import volumes' (thousand tonnes; 2010-2019)



Source for trade data: Comext, Comtrade.

Figure 32. Euro/US$ exchange rate (January 1999-June 2011)

Source: European Central Bank.

Table 1. European Union. Per capita and total banana consumption by member state (kg per capita per year; 000 tonnes; 1997, 2002, 2007)

	1997		2002		2007	
	Total consum-ption	Per capita consum-ption	Total consum-ption	Per capita consum-ption	Total consum-ption	Per capita consum-ption
Austria	80	10	73	9	82	9,9
Belgium	Na	Na	7	0,6	71	6,7
Bulgaria	14	1,7	31	4	36	4,7
Cyprus	8	10,9	10	12,4	9	10,8
Czech Republic	84	8,2	89	8,7	84	8,2
Denmark	50	9,6	77	14,3	77	14,1
Estonia	11	7,6	9	6,7	11	8
Finland	57	11,1	59	11,4	68	12,8
France	68	1,2	138	2,3	305	4,9
Germany	914	11,2	921	11,2	950	11,5
Greece	57	5,2	64	5,8	87	7,8
Hungary	54	5,3	96	9,5	71	7
Ireland	35	9,6	40	10,1	47	10,8
Italy	412	7,2	460	8	470	7,9
Latvia	17	6,9	14	6	17	7,4
Lithuania	24	6,8	16	4,7	16	4,7
Luxemburg	Na		3	7,7	3	7,3
Malta	6	16,7	6	15,9	4	10
Netherlands	20	1,3	114	7,1	59	3,6
Poland	167	4,3	128	3,3	118	3,1
Portugal	128	12,7	149	14,4	133	12,5
Romania	38	1,7	61	2,8	147	6,8
Slovakia	60	11,2	44	8,1	39	7,3
Slovenia	26	13,4	25	12,6	23	11,3
Spain	382	9,6	372	9	420	9,5
Sweden	133	15,1	157	16,6	140	15,3
United Kingdom	600	10,2	787	13,2	891	14,6
European Union	3694	7,7	3951	8,2	4378	8,9

Table 2. EU import tariffs for bananas under different regimes; preferential margin vis a vis Ecuador of Andean and Central American signatory countries of the Trade Agreements with the EU

	Import tariff (€/t)				Preferential margin of Central America and Andean countries vis a vis Ecuador (no DDA modalities)	Preferential margin of Central America and Andean countries vis a vis Ecuador (DDA modalities by 31.12.2013)
	MFN (no DDA modalities)	MFN (DDA modalities by 31.12.2013)	ACP & LDC	Trade Agreements between the EU and Central America and Andean countries*		
2010	148	148	0	145	3	3
2011	143	143	0	138	5	5
2012	136	136	0	131	5	5
2013	132	132	0	124	8	8
2014	132	127	0	117	15	10
2015	132	122	0	110	22	12
2016	127	117	0	103	24	14
2017	122	114	0	96	26	18
2018	117	114	0	89	28	25
2019	114	114	0	82	32	32
From 1.1.2020	114	114	0	75	39	39

**** Until December 31.2019 the preferential tariff is subject to a "stabilization clause" based on country-specif trigger import volumes***

ENDNOTES

1 In figure 2 data for 2008 are represented because for 2008 and 2009 the Comtrade database does not contain information for some of the main exporters.

2 EC Regulation 1782 of 19 December 2006.

3 EC Regulation 416 of 28 February 2001.

4 This is a group of countries identified as the least developed ones based on criteria defined by the UN. The group currently includes 47 countries.

5 EC Regulation 1528 of 20 December 2007. As a matter of fact, only the Caribbean Community CARIFORUM countries (except Haiti) signed with the EU an EPA, while all the other agreements signed so far from the EU and ACP countries are 'interim' agreements. However, this makes no difference from the point of view of the implications of the agreements for the EU preferential trade policy regime for bananas.

6 Opinions regarding the capability of ACP exporters to continue expanding at a sustained rate exports and their share of the EU market differ. While ample margins exist to improve production technologies and expand land allocated to banana production, problems related to the strength of public institutions and physical infrastructures appear today as the main factors constraining the expansion of exports in many ACP countries.

7 Ecuador exports increased in 2009, while they declined in 2010, due to adverse climatic conditions in the second half of the year.

8 In considering the linkages between land productivity and competitiveness of banana exports one should take into account the possibility of different production systems - one for exports, the other producing for the domestic market – being characterized by different production technologies and product quality characteristics.

9 For all eight countries, when recent developments in their banana exports to the EU are used to forecast future developments, one should keep in mind that in recent years they have been subject to two major changes in the EU import regime for bananas, with conflicting effects on their competitiveness: the introduction, on 1 January 2006, of the 'tariff only' import regime for bananas originating in MFN countries, and, on 1 January 2008, of the EPAs, which resulted in a tariff- and quota-free regime for ACP exports.

10 Evidence exists that bananas branded by Chiquita obtain a small price premium on the EU market. However, whether this premium is only the result of significantly larger marketing efforts by Chiquita or reflects also quality differences of Chiquita bananas with respect to other branded bananas, remains an open issue.

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