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BANANA

Market Review
Preliminary Results
2024



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NOTE ON METHODOLOGY

This report provides a preliminary analysis of developments in global banana trade in 2024. The analysis is based on provisional full-year estimates that were compiled and constructed from the following sources: country responses to the 2024 questionnaire of the FAO Intergovernmental Sub-Group on Bananas; data from the UN Comtrade database; data from Global Trade Tracker Inc.; and secondary data and information from desk research. The findings incorporate preliminary monthly trade data as well as information from industry sources as available up to the beginning of November 2024. Due to the customary lag in the reporting of monthly trade data, full-year estimates in this report were generated from monthly export data by country as reported up to June/July 2024 and monthly import data as reported up to August/September 2024. FAO is continuously monitoring global trade flows of bananas and will update these results in the second quarter of 2025 when official data for 2024 have been released and validated.

All datasets refer to global trade of fresh bananas, excluding plantains, as covered by HS code 080390 under the harmonized tariff nomenclature system of the World Customs Organization. Data on the import volumes of the European Union exclude the United Kingdom of Great Britain and Northern Ireland since February 2020.

Unless otherwise specified, the source of the figures is the author(s)' own elaboration from various data sources as explained above.

All data in this report should be considered as provisional.



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FOREWORD

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

This report was prepared by the Team on Responsible Global Value Chains, Markets and Trade Division, Food and Agriculture Organization of the United Nations (FAO), Rome.

The Team on Responsible Global Value Chains collects data and conducts analysis on trade in bananas and tropical fruit and carries out research and analysis on global value chains and agricultural commodities. Regular publications include market reviews, outlook appraisals and projections for bananas and tropical fruits. The team also provides technical assistance to developing countries in designing and implementing national policies regarding responsible agricultural value chains.

The report is available at the following FAO webpage:

<https://www.fao.org/markets-and-trade/commodities-overview/bananas-tropical-fruits/bananas>



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DEVELOPMENTS AT A GLANCE

- ▶ Global export quantities of bananas declined modestly during the first six months of 2024 compared to the same period in 2023.
- ▶ Preliminary full-year estimates indicate that global export quantities will likely contract by approximately 1 percent from the 2023 level, to some 19.1 million tonnes in 2024.
- ▶ Key factors affecting trade in the first nine months of 2024 were reported as:
 - Production shortages caused by adverse weather conditions in several key supplying countries.
 - Losses and additional costs stemming from the spread of plant diseases, importantly the Banana Fusarium Wilt Tropical Race 4.
 - Conflicts and adverse geopolitical developments affecting trade routes and trade relations.
 - Low profitability for both producers and exporters amid high production costs and the depreciation of the United States dollar, which resulted in lower earnings in local currencies.
- ▶ These factors affected the ability of producers and exporters to supply bananas in adequate quantities and of the quality standards expected in import markets in several key regions.
- ▶ Developments on the import side showed steady demand in the two key global import markets, the European Union and the United States of America, but marked declines in China and the Russian Federation.
- ▶ Average import unit values in the European Union and the United States of America displayed a tendency to fall over the first nine months of the year, pointing to mounting downstream pressure along the value chain and a continuously difficult operating environment.

Preliminary results on global banana trade in 2024

According to preliminary data and information on developments over the first six to nine months of 2024, global trade in bananas continued to be affected by lower supplies stemming from the impact of adverse weather conditions and the spread of plant pests and diseases. As in the previous year, developments appeared to be significantly divergent among key global trade partners, as weather conditions and the economic backdrop proved to be beneficial to some exporting countries and adverse to others. Higher supplies were reported from Colombia, India and Viet Nam during the first eight months of the year, where production growth was seen on the back of higher investments in production expansion and favourable climatic conditions. Conversely, adverse temperatures, excessive rainfall, and the passing of tropical storms reduced supplies available for export from Costa Rica, the Dominican Republic, Ecuador, Guatemala and Mexico. The spread of plant diseases, importantly the devastating spread of the Banana Fusarium Wilt Tropical Race 4 (TR4) disease in the Philippines and its alarming presence in the Bolivarian Republic of Venezuela and Peru, further continued to cause production losses as well as financial strain from the substantial costs associated with disease prevention. Against this background, producers faced added difficulty stemming from unfavourable exchange rates amid the depreciation of the United States dollar in the first half of the year, which resulted in lower earnings in local currency since exports are typically priced in US dollars and thereby compounded the negative effects of persistently high costs of production on profitability. High interest rates, which impeded economic activity in both domestic and importing markets, added further to the pressure.

Import demand for bananas, meanwhile, remained reportedly steady in key developed markets. Amid inflationary pressures, bananas continued to benefit

from their relative affordability compared to other fruits, which supported their popularity among consumers in both the European Union and the United States of America. However, despite the relatively positive demand situation in key developed markets, average import unit values displayed a tendency to decline over the first nine months of the year. Available data as reported indicate that the average import unit values for shipments to the European Union and the United States of America respectively witnessed year-on-year decreases of 2-percent and 17-percent over this period, thereby pointing to a reversal of the rising trend in prices of the previous two years and a renewed mounting of downstream pressure along the value chain. The outlook for the industry therefore looks set to remain difficult, with low and declining margins hindering producers' ability to cope with high production costs and environmental threats. However, it is important to note that the data available at the time of writing were of preliminary nature only and may be subject to corrections once final data have been released.

Exports

First semester conditions persisting, preliminary estimates indicate that global exports of bananas, excluding plantain, may experience a decrease of 1 percent in volume terms in 2024. Total export quantities are thereby estimated to fall to some 19.1 million tonnes. Similarly to the main trends in 2023, developments in the first half of 2024 showed strongly diverging trends among global banana exporting countries, with most suppliers affected by declines, in several cases even at double-digit rates, and only a few seeing large increases.

Against this background, shipments from **Latin America and the Caribbean** (LAC), the world's leading exporting region, are expected to drop by an estimated 4.8 percent in 2024, to a total of approximately 13.8 million tonnes – some 700 000 tonnes lower than their 2023 level. Ecuador, the largest exporter of bananas globally, registered a drop of some 7 percent in shipments in the first eight months of 2024, meaning

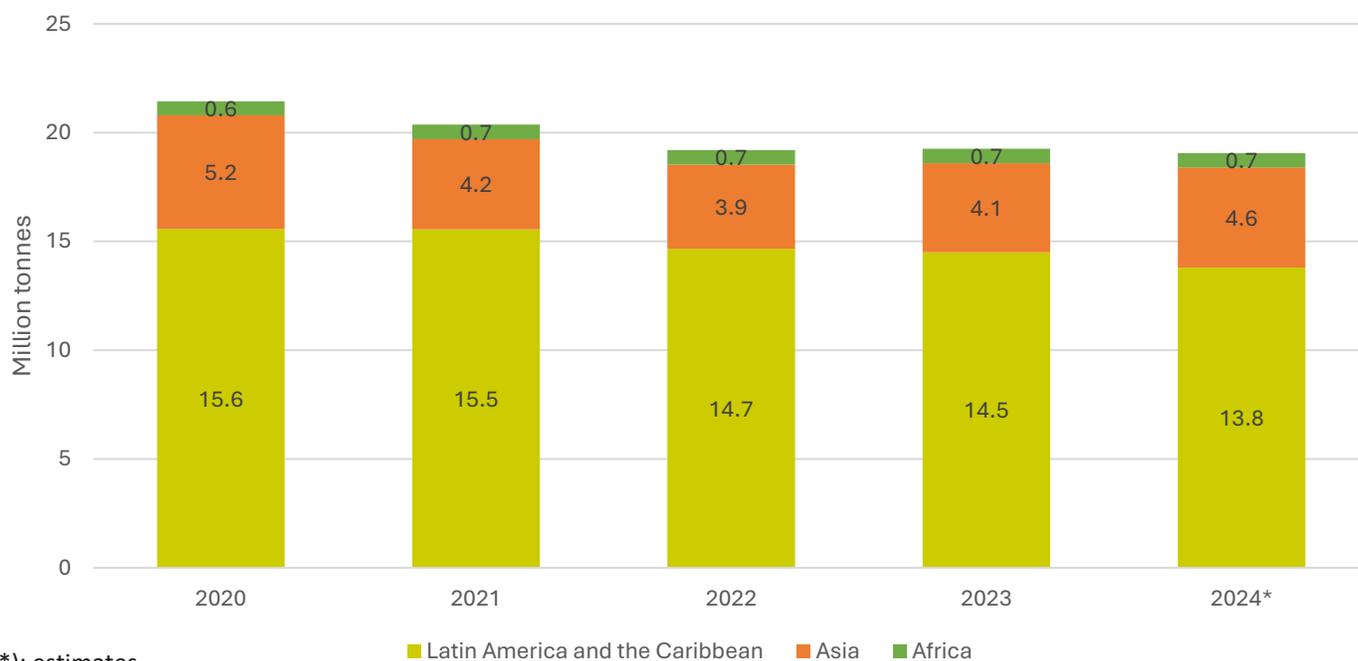
that over the full year, total exports from the country would fall to approximately 5.8 million tonnes. Industry sources reported that production in the country dropped by some 15 percent year-on-year in the first nine months of 2024, on account of adverse weather conditions that included varying temperatures and excessive rainfall. Furthermore, lower shipments to the Russian Federation, previously the largest recipient of bananas from Ecuador, added to the difficulties. According to officially reported data, exports of bananas from Ecuador to the Russian Federation fell by 12 percent year-on-year over the first eight months of 2024, a drop that could not be offset by higher shipments to alternative destinations. With these developments, pressure on Ecuadorian growers amplified, as profit margins reportedly remained tight amid high production costs and low minimum prices. Additional expenditures stemming from the necessity to maintain rigorous TR4 prevention measures in view of the outbreaks of TR4 in neighbouring Colombia and Peru added further difficulty.

Shipments from Guatemala, the second largest exporter from the LAC region and the leading exporter to the United States of America, are expected to contract by

1 percent in 2024, pointing to a full-year estimate of 2.6 million tonnes. Production in Guatemala experienced damage from the passing of tropical storms during June to September, notably from Hurricane Beryl in July, which destroyed planted areas and affected the quality of supplies. The relatively weak US dollar compared to the Guatemalan quetzals was further quoted as posing difficulties for growers as it severely impeded the profitability of their operations amid high production costs. While a large share of operational costs is accrued in local currency, sales are conducted in USD at predetermined prices, regardless of currency developments. At an average export unit value of USD 381 per tonne, bananas from Guatemala continued to be among the cheapest bananas available in global markets. Despite this already low price level and mounting cost pressures, average export unit values for Guatemalan bananas destined to world markets posted a year-on-year decrease of 2 percent over the period January to August 2024, thereby adding further strain on downstream profitability.

Meanwhile, exports from Colombia, the third leading supplier of bananas in the LAC region, experienced a strong recovery from the weather-induced production

Figure 1. World banana exports by region, 2020–2024, million tonnes



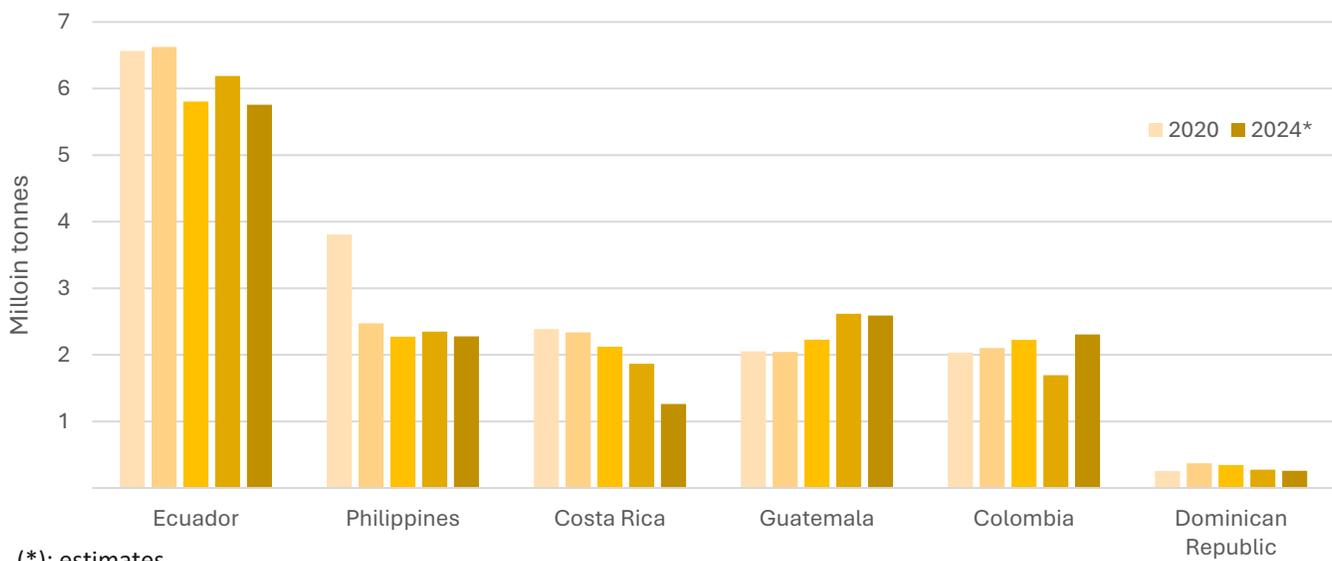
shortfalls of 2023. Preliminary monthly trade data disseminated by the Colombia National Customs Office show a year-on-year expansion of 45 percent over the period January to August 2024, accompanied by an 8 percent increase in the average export unit value. Shipments rose to the United States of America and the European Union, both key markets for Colombia. Over the full year, banana exports from Colombia are thereby expected to grow to some 2.3 million tonnes, which would mark their highest level on record.

Costa Rica, another significant exporter from the region and third leading supplier to the European Union (EU-27), saw production quantities severely affected by the downsizing of operations across the industry in 2024. The reason behind this fall was the depreciation of the United States dollar, which reduced profit margins substantially as costs of production, which are predominantly incurred in Costa Rican colons, remained high, while prices for banana shipments in United States dollar remained unadjusted for the less favourable exchange rate.¹ Monthly export data from the Costa

Rica National Institute of Statistics up to August 2024 show a year-on-year drop of 32 percent in quantity terms over the first eight months of the year, with equivalent declines to the United States of America and the European Union, both key export markets for Costa Rica. For the full year, banana exports from Costa Rica are thereby expected to drop by some 32 percent in quantity terms, to approximately 1.3 million tonnes, their lowest level recorded.²

Provisional estimates indicate that shipments from Mexico will fall by approximately 11 percent in 2024, to 380 000 tonnes. On average, some 80 percent of Mexican supplies are destined for the United States of America, with the remainder primarily going to Japan. While Mexico continues to be a comparatively small exporter in global banana markets, the country emerged as one of the leading suppliers of organic bananas to the United States of America in recent years, behind Ecuador and Colombia. In the first half of 2024, production in Mexico was affected by hurricane damage, adverse weather conditions, high production

Figure 2. World banana exports by selected origins, 2020 to 2024, million tonnes



¹ <https://qcostarica.com/costa-rica-exports-continue-to-grow-but-at-a-slower-pace-due-to-high-interest-rates-and-exchange-rate/>

² Data on exports of bananas from Costa Rica quoted in this publication refer to the preliminary estimates and information that were available at the time of writing. FAO has received a new set of official data on banana exports from Costa Rica that show substantial differences. These data are currently under review and, once validated, will be included in the forthcoming full-year results of the Banana Market Review 2024.

costs and an unfavourable exchange rate with the US dollar. These factors resulted in a reduction in supplies for export markets and a 5 percent year-on-year increase in the average export unit value of organic bananas shipped to the United States of America, to USD 769 per tonne on average over the first nine months of the year.

Available partner data and information indicate that exports from the **Caribbean** sub-region may fall by an estimated 6 percent over the full year 2024, to some 260 000 tonnes. A reduction in shipments from the Dominican Republic, which accounts on average for some 95 percent of banana supplies from the Caribbean, would be the key reason behind this fall. While at the time of writing, direct monthly data on trade quantities from the Dominican Republic were not obtainable, banana production in the Dominican Republic reportedly continued to be affected by harmful weather events, including hurricanes, unpredictable variations in rainfall, and drought. In addition to these difficulties, industry sources reported that a lack of efficient cold chains negatively affected the freshness and quality of bananas and thereby further hindered exports.³

According to provisional data, banana exports from **Asia** may rise by 12 percent in 2024, to some 4.6 million tonnes. The main reason behind this are substantial increases in supplies from several emerging exporters in the region, importantly India, Myanmar and Viet Nam, where import demand from China and from some emerging importers in the Middle East has been driving investments in banana plantations in recent years. Full-year estimates thereby expect banana exports from India to surge to over 800 000 tonnes in 2024, a rise of approximately 63 percent from 2023, and those from Viet Nam to grow to some 490 000 tonnes, which would mark an expansion of nearly 15 percent from 2023.

Shipments from Myanmar are estimated to expand by 64 percent in 2024, to 200 000 tonnes. Meanwhile, supplies from the Philippines, the main exporter from the region, reportedly continue to be affected by the spread of TR4 in the country. According to information released by the Pilipino Banana Growers and Exporters Association in September 2024, out of the original 89 000 hectares of land available for banana cultivation in Mindanao, the key banana producing region of the Philippines, only 51 000 continue to be operational, with the remainder affected by the presence of TR4 fusarium in the soil.⁴ The Pilipino Banana Growers and Exporters Association further reported that rising geopolitical tensions in the South China Sea additionally affected some exports of Philippine bananas.⁵ Based on available monthly export data up to August 2024, banana shipments from the Philippines are thereby estimated to fall by some 3 percent over the full year, to 2.3 million tonnes. Banana exports from Cambodia, another emerging supplier mainly to China, meanwhile, reportedly continued to be affected by adverse weather events in the first half of 2024. Export quantities from Cambodia are accordingly expected to fall by some 16 percent in 2024, to approximately 230 000 tonnes.

Based on first semester developments, exports from **Africa**⁶ may register an estimated contraction of 1.5 percent in quantity terms in 2024, to some 650 000 tonnes. An expected 6-percent decline in supplies from Côte d'Ivoire to some 330 000 tonnes, would be the main reason behind this contraction. Shipments from Côte d'Ivoire primarily go to the European Union, mainly France, which typically receives 50 to 60 percent of quantities every year. Available trade data by destination show that shipments from Côte d'Ivoire to France fell by 16 percent year-on-year from January to August 2024, accompanied by an 18-percent decrease in the average export unit value. Meanwhile, banana exports from Côte d'Ivoire to the United Kingdom of

³ <https://eldia.com.do/el-banano-criollo-pierde-mercado-a-nivel-internacional/>

⁴ <https://www.bworldonline.com/agribusiness/2024/09/30/624562/phl-losing-share-in-key-banana-markets-due-to-pests-diseases/>

⁵ <https://www.philstar.com/business/2024/11/12/2399393/west-philippine-sea-tension-production-woes-shrink-banana-exports-china>

⁶ Data in this market review exclude intra-African trade.

Great Britain and Northern Ireland show growth of 23 percent over the same period, to 24 000 tonnes, albeit accompanied by a 37-percent drop in the average export unit value. Côte d'Ivoire had signed an Economic Partnership Agreement with the United Kingdom of Great Britain and Northern Ireland in November 2020, which encompasses tariff-free trade of bananas between the two partners and has resulted in export quantities more than doubling since then.

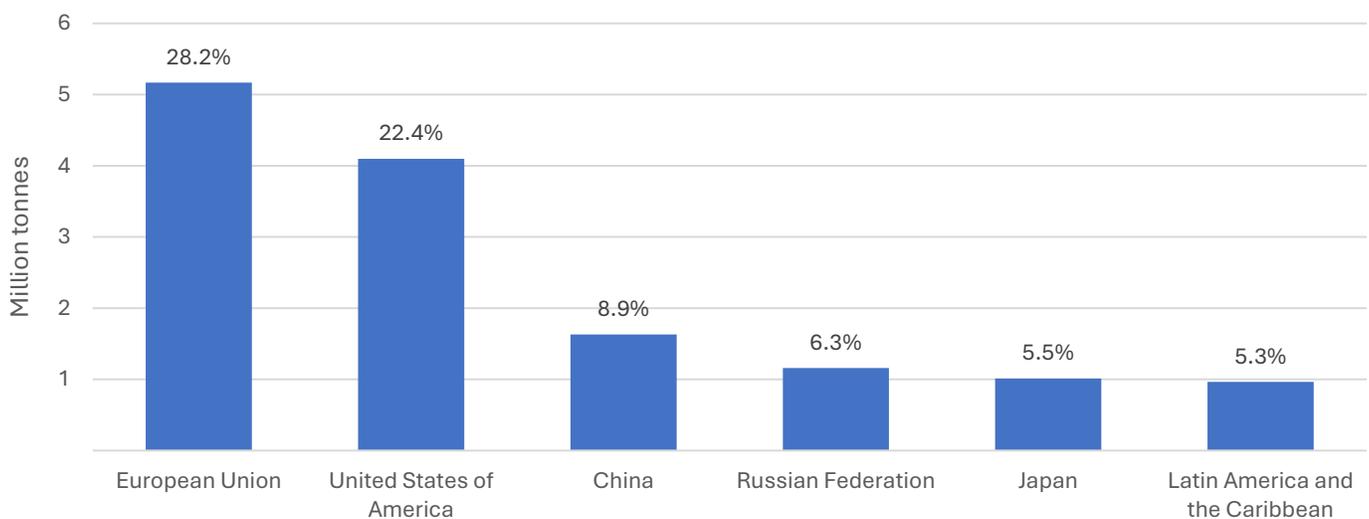
Supplies from Cameroon, meanwhile, fell by some 11 percent in the first half of 2024, pointing to a full-year estimate of approximately 170 000 tonnes. Cameroon ranks as the second largest banana exporter from the region behind Côte d'Ivoire, accounting for an approximate quantity share of 30 percent over the 2018 to 2022 period. In 2024, supplies from Cameroon were reportedly once again impeded by the separatist crisis and deteriorating security situation in the country, which resulted in losses of labour, the destruction of facilities, and the abandonment of plantations.⁷ While at the time of writing, direct export data from Cameroon could not be obtained, available partner data from the European Commission's EuroStat show a decrease in imports from Belgium, the largest recipient of bananas from Cameroon, by 7 percent over the first eight months of 2024, to some 81 000 tonnes. Monthly

trade data from the United Kingdom HM Customs for the period January to August 2024, meanwhile, indicate that shipments from Cameroon to the United Kingdom of Great Britain and Northern Ireland registered a drop of 9 percent compared to the same period of the previous year, down to some 24 000 tonnes.

Imports

Preliminary monthly trade data for the period January to August 2024 suggest that global net import quantities of bananas would contract by 1 percent in 2024, to some 18.3 million tonnes. While demand in developed import markets remained relatively firm, procurements from China and the Russian Federation displayed large decreases over the first eight months of the year. Growth in imports was additionally hindered by a reduced availability of export supplies from key producing countries, especially from Costa Rica, Ecuador, Guatemala, and the Philippines. These lower availabilities particularly affected the level of import quantities received over this period by Japan, the United Kingdom of Great Britain and Northern Ireland and the United States of America, which together account for some 32 percent of global imports.

Figure 3. Distribution of global net imports by main market, million tonnes and share in global imports, 2024 (estimates)



⁷ <https://www.businessincameroon.com/agriculture/1106-13921-cdcs-banana-exports-in-early-2024-fall-to-one-third-of-pre-crisis-levels>

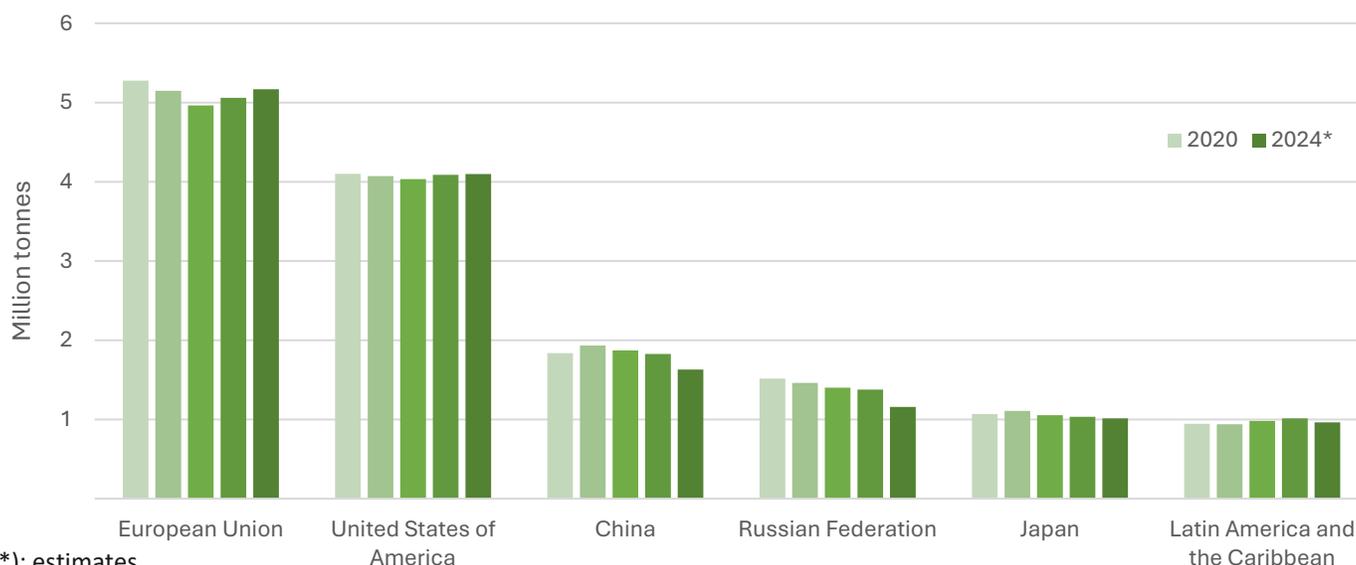
Available monthly trade data show that net imports by the European Union (EU-27), the largest importer of bananas globally, grew by some 2 percent year-on-year over the first eight months of the year, pointing to a full year estimate of 5.2 million tonnes in 2024. The total import quantity would thereby remain some 10 percent below its pre-pandemic level. Supply shortages in some of the main exporters to the European Union, importantly in Costa Rica, the Dominican Republic, and Ecuador were the main factors impeding further expansion. Industry sources meanwhile reported that consumer demand remained firm in most European Union markets, supported not only by the convenience factor and nutritional characteristics of bananas but also by their relative affordability amid persistently high price levels for other fruits. A brief dip in demand was visible during the summer months, when hot temperatures and competition from other fruits resulted in a temporary shift in consumer preferences. However, despite a general situation of low supplies against relatively steady demand, average import unit values showed noticeable decreases over the first nine months of 2024, declining at rates of 3 to 5 percent year-on-year in the key markets of France, Germany, Italy and the Kingdom of the Netherlands.

EU banana production takes place in the overseas territories of Spain and France, namely in the Canary Islands and the French West Indies, with supplies from Spain typically accounting for over 50 percent of EU banana production alone. Following production shortages in the Canary Islands in the months of April, May and June, provisional estimates provided by the European Commission in June 2024 project banana production in Spain to fall by some 8.5 percent in 2024, equivalent to a decrease of some 37 000 tonnes from the previous year. Quantities produced in France, meanwhile, are estimated to rise by 5.9 percent year-on-year, on account of high output in both of the country's two production areas, Guadeloupe and Martinique. Estimates by the European Commission accordingly assume a total of 205 441 tonnes of bananas produced in France in 2024, an approximate increase of 10 000 tonnes from the previous year. The average unit value of banana supplies from France in 2024 is predicted to range between EUR 650 and 740/tonne, while that from Spain is expected to be substantially higher at EUR 1 120/tonne. In comparison, the average unit value of bananas supplied by Latin American origins to the European Union over the first eight months of 2024 ranged between EUR 600 and 780/tonne, tariffs included.

European banana production was estimated to decline to 625 774 tonnes in 2024, an approximate 4 percent decrease from 2023. On average, over 90 percent of

Net imports into the United States of America showed very little change over the first eight months of the

Figure 4. World banana imports by destination, 2020-2024, million tonnes



year and are thereby estimated to largely remain at a full-year total of approximately 4.1 million tonnes in 2024. While consumer demand for bananas in the United States of America continued to be supported by the fruit's relative affordability, import growth was curtailed by a reduced availability of export supplies in key origins. Preliminary monthly import data show that shipments from Guatemala, Honduras and Mexico, from which the United States of America jointly obtains some 60 percent of total procurements, showed year-on-year declines of between 7 and 13 percent in quantity terms over the period January to August 2024. Against these lower quantities of conventional bananas stood a notable rise in imports of organic bananas, which expanded by some 12 percent over this period, to some 420 000 tonnes. In particular, shipments of organic bananas from Ecuador registered a strongly positive performance over this period, with monthly trade data showing a year-on-year increase of 18 percent over January to August 2024. Despite the generally firm demand situation, average unit values at import level as well as US wholesale and retail prices displayed a tendency to decrease over the first nine months of 2024, respectively averaging some 17 percent, 3 percent and 1 percent lower than over the same period of the previous year, thereby pointing to intensifying downstream pressure and a widening of margins along the value chain.

Net imports by China dropped by 11 percent year-on-year in quantity terms over the period January to August 2024, driven by lower supplies. Over the full year, total imports by China are thereby estimated to fall to 1.6 million tonnes. Nevertheless, the country is likely to retain its position as the third largest importer of bananas globally, at an expected quantity share of 9 percent of global imports in 2024. Available information suggests that imports into China were hindered by supply shortages experienced in Cambodia and the Philippines, from where China procured some 50 to 60 percent of banana imports combined in recent years. Preliminary monthly trade data show that Chinese imports of Filipino bananas dropped by 39 percent year-on-year over the first nine months of 2024. Shipments of bananas from Cambodia to China, meanwhile, decreased by 9 percent in quantity terms.

According to industry sources, Chinese import demand was further reduced by a higher availability of domestically produced bananas. In view of lower demand, average import unit values from most origins displayed substantial year-on-year declines, at rates between 10 to 15 percent, resulting in an overall average unit value of bananas imported into China from all origins of USD 530 per tonne. Imports from Viet Nam, an emerging supplier to China, meanwhile, grew by a reported 22 percent year-on-year over this period, to some 490 000 tonnes, supported by ample supplies and low average import unit values of 414 USD/tonne.

Available partner data indicate that net imports by the Russian Federation may drop by an estimated 16 percent from the previous year, to 1.2 million tonnes in 2024. However, it is important to note that at the time of writing, direct monthly import data from the Russian Federation could not be obtained for any month of 2024, rendering a precise assessment of recent developments difficult. The Russian Federation imports bananas almost exclusively from Ecuador via previously agreed contracts, which are settled in US dollars. Available partner data from Ecuador showed a 19 percent year-on-year decrease in shipments to the Russian Federation over the period January to September 2024. Industry sources reported that imports of bananas were curtailed by corollary effects of the economic sanctions against the Russian Federation and persistently high transportation rates to this destination.

Net imports by Japan are foreseen to decrease by an estimated 2 percent in 2024, to approximately 1 million tonnes. While demand for bananas in the country remained relatively stable, import quantities continued to be reduced by the production shortages experienced in the Philippines, from where Japan typically sources some 75 to 80 percent of its banana imports. Available monthly trade data for the first seven months of the year accordingly show year-on-year declines in import quantities into Japan from the Philippines by 4 percent, which were not offset by higher imports from Ecuador and Viet Nam despite fast growth in procurements from these two origins.

STATISTICAL ANNEX

Table 1 - Banana exports

	2018–2022	2023	2024*
	(... thousand tonnes...)		
Latin America and the Caribbean	15 436	14 497	13 800
South America	8 924	8 317	8 462
Colombia	2 001	1 695	2 307
Ecuador	6 436	6 190	5 757
Peru	209	142	149
Central America	6 172	5 902	5 077
Costa Rica	2 260	1 866	1 262**
Guatemala	2 221	2 616	2 591
Mexico	538	426	381
Caribbean	340	278	262
Dominican Republic	331	275	258
Asia	4 530	4 095	4 600
Cambodia	227	275	229
India	241	499	813
Myanmar	115	121	199
Pakistan	90	140	164
Philippines	3 216	2 350	2 278
Viet Nam	287	429	492
Africa	689	663	653
Cameroon	202	192	171
Côte d'Ivoire	332	355	334
Ghana	72	47	51
Egypt	7	9	47
Eswatini	14	25	25
United Republic of Tanzania	7	6	2
World	20 713	19 302	19 101

(*): estimates

(**): Data on exports of bananas from Costa Rica quoted in this publication refer to the preliminary estimates and information that were available at the time of writing. FAO has received a new set of official data on banana exports from Costa Rica that show substantial differences. These data are currently under review and, once validated, will be included in the forthcoming full-year results of the Banana Market Review 2024.

Table 2 - Banana imports

	2018–2022	2023	2024*
	<i>(...thousand tonnes...)</i>		
Latin America and the Caribbean	884	1 014	964
Argentina	460	473	428
Chile	223	254	265
Uruguay	54	56	57
Asia	5 039	4 346	4 381
China	1 855	1 827	1 630
Japan	1 055	1 033	1 013
Africa	441	477	516
South Africa	165	169	198
Europe	8 226	7 827	7 654
European Union	5 448	5 059	5 168
United Kingdom of Great Britain and Northern Ireland	552	848	814
Russian Federation	1 473	1 376	1 159
Ukraine	276	201	191
Northern America	4 686	4 675	4 698
Canada	586	587	600
United States of America	4 100	4 087	4 097
Oceania	90	83	88
New Zealand	90	83	88
World	19 367	18 422	18 301

(*): estimates



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