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THE BANANA INDUSTRY OF THE CANAL ZONE

Prepared by: Agriculture, Forestry & Fishery Section

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## THE BANANA INDUSTRY OF THE CARIBBEAN AREA

### SUMMARY

The history of production and marketing of bananas for export has, since the beginning of the century, indicated a very heavy concentration of the industry under the control of the United Fruit Company and to a considerably smaller extent the Standard Fruit and Steamship Company. This concentration has been brought about chiefly as a result of the perishable nature of the fruit, requiring carefully coordinated production and marketing. The comparatively recent incidence of two plant diseases, which has resulted in a marked increase in costs of production, has also influenced the movement towards large scale concentration. Panama disease once it has become established in the soil means that the land has to be permanently abandoned for banana growing. As a result of this disease there has been a major migration of the industry from the Atlantic to the Pacific Coast of Central America; the new land is less suitable for banana production and consequently costs have increased. Sigatoka disease has resulted in a deterioration in quality of fruit produced; costly spraying equipment is required if the disease is to be checked.

World exports of bananas which in 1945 had fallen to only 43 percent of the prewar level had recovered to 75 percent of prewar by 1947. Caribbean countries which before the war had accounted for 71 percent of world exports contributed 78 percent in 1947. Owing to a shortage of bananas during and after the war the recent increase in exports from the Caribbean has been largely in the form of poor quality bananas which would not normally be shipped.

The chief markets before the war for Caribbean bananas were the United States and Europe. Six countries together accounted for 88 percent of world imports; the United States took about 55 percent; the United King-

dom, France and Germany absorbed about 25 percent; and Argentina and Canada together imported another 8 percent. In 1947 the United States took 70 percent, the three European countries 11 percent and Argentina and Canada 11 percent.

Per capita consumption in the two chief importing countries, the United States and the United Kingdom, remained relatively stable between the wars and it would appear that the long run demand was thus largely a function of population growth. In general consumption of bananas outside the areas in which they are grown seems to be restricted to a rather small group of countries having relatively high income levels. An extension of markets, therefore, appears likely to occur only if prices can be effectively reduced. Increasing costs of production, however, make a reduction in prices to the prewar level a doubtful possibility. Owing to the probable continuation of a shortage of bananas, prices are liable to remain high for some time to come.

Future demand for imports of bananas, outside of the United States market, appears unlikely to reach the prewar level for some years, particularly in view of the uncertainty regarding probable imports into Germany. European countries generally appear likely to turn to their colonial possessions to satisfy their demands leaving independent producers to find a market in North America, where there appears to be an assured market for available exports, at least of quality fruit, for several years to come.

## THE BANANA INDUSTRY OF THE CARIBBEAN AREA

### 1. INTRODUCTION

The most important variety of banana entering into international trade is the Gros Michel. This banana is the one marketed in the United States and is produced for export by many countries in Central and South America and the West Indies. The only other variety normally of importance in international trade is the Cavendish, which is grown for export in the Canary Islands and Brazil.

The chief markets for Caribbean bananas are North America and Europe. The only other important sources of supply for these markets are the Canary Islands, Brazil and Ecuador.

Statistics on bananas are highly unreliable and subject to a considerable degree of error. In the first place very little data is available on production; secondly, trade statistics are collected in terms of the number of "stems" each of which varies considerably in the weight of the fruit, not only with regard to supplies from different countries but also with regard to shipments from the same country. A "stem" of bananas consists of a number of clusters or "hands" each containing a varying number of bananas or "fingers". For statistical and trading purposes there has been developed the concept of the "count bunch" which consists of a "stem of nine hands of sixteen fingers".

### 2. PRODUCTION AND DISTRIBUTION PROBLEMS

The chief requirements for the successful growth of bananas are a tropical climate, almost daily rainfall and soil which drains rapidly. Areas which fulfill these requirements are scarce. In most areas rainfall is not uniform throughout the year and irrigation is necessary. A system of ditches is sometimes used but for the best results rainfall should be simulated. This is done by a series of pumps, a piping structure and a series of towers with revolving nozzles.

Hurricanes are common in the banana regions of the Caribbean. Heavy losses occur when the wind attains 30 mph. When a hurricane hits a banana plantation the fruit becomes an almost total loss and the plantation is out of production until new plants can be raised and brought to maturity, which takes twelve to fifteen months.

Owing to the isolated position of most banana plantations, medical, housing and educational facilities have to be provided for workers and their families. For the same reason a private system of transport is required consisting of light railways or roads with wharves and other port facilities in order that the fruit may be moved from plantation to ship.

One of the major hazards of banana production is the occurrence of plant diseases, the two most important of which have been Panama and Sigatoka. Panama disease is a fungus which attacks the roots of the plant and once it has become established in the soil production can not be profitably continued and the land has to be permanently abandoned for banana growing. Sigatoka disease is a leaf blight which withers the leaves required to shade the fruit from the sun. The withering of the leaves causes the banana to ripen prematurely with a resulting deterioration in quality. Unlike Panama disease, Sigatoka can be controlled by spraying. Spraying equipment may consist of small mobile units, tanks, hoses and nozzles, or permanent piping systems laid throughout the plantation. Sigatoka was first experienced in Caribbean banana lands in the middle 30's, causing considerable damage, and the installation of spraying equipment has doubled the cost of production on those lands where it has proved necessary.

Owing to the perishable nature of the fruit it has to be cut at just the right time. The stems are cut green, the degree of maturity depending largely on the time it will take to reach the market. The coordination of cutting and shipping is vital.

Again owing to the perishable nature of the fruit it must be transported to market under strictly controlled conditions. With the exception of Mexico and some parts of Guatemala which are connected by land with the United States, all fruit for that market and Europe must be transported by sea. A special type of refrigerator ship has been built for this purpose. On arrival at the import port the fruit for inland consumption is transferred to refrigerated railway cars and checkers are employed at various points along the route to ensure that the fruit reaches the desired destination in good condition. Further, in the United States, the fruit companies have constructed special controlled ripening chambers so that the fruit can be delivered to local wholesale and retail markets in the right condition.

### 3. THE CONCENTRATION OF THE INDUSTRY

Although the existence of the banana has been known for centuries, the perishable nature of the fruit confined its consumption largely to the tropical producing areas. Sporadic trading in bananas by sailing vessel between the United States and the West Indies and Central America was in evidence as early as 1850 but it was not until the 1870's that a regular international trade grew up.

Prior to 1900 the industry was operated chiefly by a large number of small firms engaged in the shipping business with a few larger firms combining production and marketing. With the turn of the century a concentration of the industry occurred and resulted in the emergence of the United Fruit Company as the unrivalled master of the banana trade both in the United States and in Europe.

By 1930 there were two large firms, the United Fruit Company and the considerably smaller Standard Fruit and Steamship Company, both with integrated structures controlling the bulk of the Caribbean banana trade. There

were also a number of independent firms operating on a small scale as shippers; these firms purchased fruit from independent planters or acted as marketing agents for growers' cooperatives. The two large fruit companies bought bananas on a contract basis from small producers as a supplement to their own plantation production.

The concentration of the industry in the hands of the two large fruit companies is due to a number of circumstances which affect both production and marketing.

On the marketing side the advantages of large scale operation arise chiefly from the perishable nature of the fruit. As storage is not practicable bananas must be scheduled to arrive at a steady rate equal to the normal demand of the market. This requires a fleet of ships under the control of the marketing organization, special arrangements with the railroads for prompt movement to inland markets and a continuous system of inspection to ensure proper temperature controls. Such an integrated organization involves high overhead expenses and profitability depends upon the distribution of a large volume of fruit. The absence of such an organization, however, involves much heavier expenses of marketing because of losses through deterioration of the fruit.

On the production side the industry can be most economically operated when integrated with marketing operations to ensure that a steady movement to market is maintained. This involves careful timing to enable plantation managers to cut just the right amount of fruit to fill cargo space which in turn should be provided in the right place at the right time. Further, unified control of a number of widely scattered plantations has distinct advantages in view of frequent but localized hurricane damage. The effect of plant diseases has been towards further concentration of the industry. When large areas have to be abandoned as a result of Panama disease a shift to another area in the same country or a different country is

feasible only for a large company. The small planter is relatively immobile and usually remains on his land only to produce an alternative crop. Again, the advent of Sigatoka disease forced many small independent producers out of production because they were either unfamiliar with the technique of control or did not have sufficient capital to install the necessary spraying equipment.

#### 4. PRODUCTION

At the beginning of the century Jamaica, Costa Rica and Colombia (which included Panama) were the three largest exporters in the Caribbean area. The prime banana lands of Honduras were developed later but became the largest single source of supply in the 1920's. During this period production in Panama and Costa Rica declined owing to Panama disease and production and exports in those countries did not revive until the production center was moved from the East to the West Coast; this movement occurred in Panama after 1928 and in Costa Rica only recently. The migration of the industry has been to what was originally submarginal banana land. This has meant not only the absorption of the cost of movement by the industry but involves increasing costs of production because of greater capital investment for irrigation of the new lands. With the exception of Honduras and Guatemala there is now very little banana production for export on the Central American Caribbean coast south of Mexico.

Panama disease does not render the land unsuitable for other crops. Possibilities of substitution vary. On the North Coast of Central America abandonment has to a large extent been an actual reality and much of the land has returned to jungle. This is largely due to the severity of the climate which was offset largely by high wages and excellent medical and sanitary facilities. The return to alternative crops in these areas have not been sufficient to maintain such a large acreage or such amenities.

The fruit companies maintain experimental stations which are constantly testing new crops. Cacao has been substituted to some extent but the returns are not nearly as great as for bananas; abaca has been produced on abandoned plantation land since the war cut off the Philippine supplies. In areas where there is a relatively larger and stable population, such as in Colombia and Jamaica, producers are likely to turn to some other form of production. Thus in Colombia many of the independent owners are turning to cattle raising.

During the last five years of the 1930's the consequences of Sigatoka disease on banana lands of the Caribbean have been severe. The effects of the disease did not become apparent until 1937/38 and coincided with the loss of markets during the war. The countries most affected were Jamaica, Mexico, Colombia and Cuba, where production is to a large extent in the hands of local owner producers. The large fruit companies operating as producers mainly in Honduras, Guatemala and Costa Rica have had the capital and initiative to combat the disease by spraying and have been able to maintain production.

The production situation, present and prospective, in the Caribbean area is as follows:-

- (a) In Colombia, no new developments are in contemplation, though United Fruit is opening up its plantations closed during the war and a number of independent growers on the better lands are making arrangements for spraying services.
- (b) In Panama, the bulk of the industry is controlled by United Fruit which has long since abandoned its East Coast plantations and has concentrated on the West Coast. New areas are not being extensively developed.
- (c) In Costa Rica, a similar situation exists with production increasing through new developments of United Fruit near the Panamanian border. The possible increase is limited as cultivated land in some areas is estimated to have a life of only five years before abandonment will be necessary.
- (d) In Nicaragua, United Fruit has an option on 50,000 acres on the Pacific Coast which it hopes to bring into cultivation during the next five years. The former plantations on the Caribbean Coast have been largely abandoned.

(e) In Guatemala, new developments of United Fruit on the Pacific Coast have offset the decline on the Atlantic Coast. A large proportion of the increased exports from Guatemala represents low quality fruit from the coffee plantations.

(f) Standard Fruit's plantations in Honduras are now operating on the last available land 80 miles from the Caribbean Coast and eventual abandonment appears to be only a matter of time. United Fruit's division, east of Standard's, on the Caribbean Coast has been abandoned and production in its western division is unlikely to recover its former levels on a long-time basis.

(g) The independent plantation system in Mexico has not recovered from the effects of Sigatoka disease which struck in the late 1930's, although funds are being made available through the Banco de Comercio Exterior for spraying equipment. The lack of adequate transportation is also retarding development.

(h) In Cuba, the industry is located on sub-marginal land where it has not proved profitable to combat Sigatoka; production has declined.

(i) The industry in Haiti was being developed by Standard Fruit but recently it has become disorganized by the combined attempts of Haitian political groups and Miami shippers to exploit the present situation and production in recent months has declined drastically. A complete reorganization of the present methods of doing business will be necessary before the trade will recover.

(j) United Fruit has recently become interested in development possibilities in the Dominican Republic and has established a plantation on the North Coast. Original plans called for an enormous development but the lack of water and porosity of the soil, which has made water storage difficult is believed to be curtailing the extent of the development. Standard Fruit is also interested in establishing plantations there.

(k) In Ecuador, a considerable acreage has had to be abandoned due to Panama disease; suitable land is limited.

(l) Production in Jamaica has fallen off badly in recent years due to Panama disease and is unlikely to recover its former levels of output. An official estimate has placed exports at 10/12 million stems per annum over the next 10/15 years. An agreement has just been concluded for a 5-year contract, 1948/52, under which the British Ministry of Food will buy the entire exportable surplus at fixed prices.

## 5. TRADE

World exports of bananas which in 1945 had fallen to only 43 percent of the prewar level had recovered to 75 percent of prewar by 1947. Some of the recent increases in exports from Caribbean countries, however, reflect the movement of low quality fruit which formerly had not been shipped. The large companies have refused to deal in these qualities so that a lucrative

trade has been temporarily assured to a number of small shippers. These small shippers have even bought bananas from the coffee plantations of Central America where the banana plants are only grown for shade. The scarcity of good banana land may keep high quality fruit production relatively low for some time to come enabling the trade in low quality bananas to continue.

The pattern of world exports has remained fairly stable for the past 45 years. The chief exception has been in the case of the Canary Islands whose original market was the United Kingdom. That market was largely lost to Jamaica in the 1930's when the latter's market shifted from the United States to the United Kingdom under colonial trade policy. Subsequently, Spain, France and Germany became the only markets for Canary bananas with Spain having to absorb any surplus supply.

Far Eastern and Southern Pacific exports consist mainly of a movement from Formosa to Japan and from Fiji and Samoa to New Zealand.

Immediately prior to World War II the United States took about 55 percent of world imports. The United Kingdom, France and Germany absorbed 25 percent and Argentina and Canada together imported another 8 percent. These six countries together accounted for 88 percent of world imports. In 1945 the United States accounted for over 78 percent of world imports and Canada and Argentina together accounted for a further 12 percent. The shares taken by these three countries have declined slightly with the partial recovery of European imports.

Sources of United States imports although remaining mainly Caribbean countries have shown marked changes from prewar. Mexican and Panamanian supplies in 1947 accounted for only half the proportion of United States imports which they accounted for between 1934 and 1938. On the other hand the proportions for Guatemala and Costa Rica have increased considerably.

Sources for United Kingdom imports have also changed considerably

since prewar. The British West Indies which accounted for over 68 percent now provide under 60 percent while Central and South American supplies which accounted for over 26 percent have disappeared from the United Kingdom market. The Canary Islands which before the war accounted for only 3 percent now provide 24 percent.

#### 6. CONSUMPTION

Per capita consumption in the thirty years to 1939 remained relatively stable in the two chief importing countries, United States and the United Kingdom. The increase in imports into these countries in general kept pace with the increase in populations. It would appear, therefore, that the long run prewar demand for imports was largely a function of population growth.

Consumption of bananas outside the areas in which they are grown seems to be restricted to a rather small group of countries having relatively high income levels. For poorer countries outside the tropics bananas are a luxury food; this is particularly evident in the case of Canary Island exports and the Spanish market. An extension of markets, therefore, is only likely to occur if prices can be effectively reduced. Costs of production, however, have been moving in an upward direction and are likely to remain at relatively higher levels in the future compared to the past.

A very rough estimate of per capita consumption of bananas in the two chief importing countries is given below.

#### PER CAPITA CONSUMPTION OF BANANAS (pounds)

Period	United Kingdom	United States
1909/13 average	7.4	22.0
1923	12.8	21.2
1924/28 average	14.0	25.4
1929/33 average	15.0	22.0
1934/38 average	14.0	22.3
1941/45 average	-	12.9
1946	4.5	19.0
1947	4.5	20.9

## 7. PRICES

Government requisition of fruit ships and hostilities during World War II cut off Europe from Caribbean sources of supply and restricted the United States market to whatever fruit could be brought in by means of small boats and by rail through Mexico. This situation placed a premium on nearness to the United States market. Price control at first helped to keep prices down but the advent of a vigorous black market centered on Miami and the resultant competition for fruit caused prices at export points to rise. It is apparent from the table below, however, that the great profits were made at the wholesale level in the United States.

PRICE INDICES OF BANANAS AND ALL FOODS  
(1939 = 100)

Year	Bananas Import Price	Wholesale Price		Bananas Retail Price
		Bananas at NY	All Foods	
1939	100.0	100.0	100.0	100.0
1940	110.0	99.5	101.3	101.5
1941	113.8	113.5	117.4	146.0
1942	115.8	276.0	141.5	162.0
1943	121.5	306.0	151.5	185.8
1944	129.3	306.0	149.0	179.4
1945	135.2	306.0	151.0	165.0
1946	155.0	318.5	185.8	184.0
1947	160.8	390.5	239.8	239.7
1948(July)	168.5	400.2	258.0	251.0

Source: US Bureau Labor Statistics.

The import price has risen 69 percent since 1939 and the retail price is up 151 percent but the New York wholesale price has advanced 300 percent. These comparisons are to a certain extent artificial as the large fruit companies enter the import values of their fruit at prices administratively determined. Also, the New York wholesale price is probably more influenced by the prices of fruit entering through Florida than by the fruit of the companies.

## 8. FUTURE DEVELOPMENTS

A number of trends in the banana industry during the past fifteen

years have become apparent as of importance in shaping the probable pattern of future development in the industry:-

(a) The shipping and marketing of bananas, and, to a considerable extent, their production, has been one of large scale enterprise in prewar years.

(b) The inroads of Panama disease, over which at the present time there is no control, is gradually destroying the best banana lands and forcing the industry to move to higher cost areas where large amounts of capital are required, chiefly for irrigation, in order to render the land capable of banana production. This factor tends to exclude the small scale operator. The large companies - particularly Standard, which is at present acutely short of fruit - are now engaged in an intensive search for suitable areas to establish new plantations.

(c) The advent of Sigatoka disease has considerably increased the costs of production and raised the capital requirements for successful development. The position of the small independent planter with small financial means is further aggravated by this factor.

(d) The small scale native operator, in general, is not equipped at the present time either technically or by his economic background to produce high quality fruit successfully without aid in other than financial forms, i.e. through government support, cooperatives and the establishment of stable arrangements to ensure the successful marketing of his produce. The areas where he has firmly established himself - Jamaica, Colombia and Mexico - are countries where the government has fostered his interests.

The present world import demand, on a prewar per capita consumption basis, would be in the neighborhood of 115 to 120 million bunches, compared with 110 million bunches for the 1934/38 period, and a current supply of only 80 million bunches. The United States market, at about 55 percent of the world total, would account for 65 million bunches and the United Kingdom, at 9 percent, 15 million bunches. The overall economic situation in Europe, particularly in Germany, raises the question whether or not that market will recover in the near future to prewar levels. If not, the European market is likely to be restricted to its colonial possessions. Independent countries, therefore, will have to look almost entirely to North America for markets. It would appear that at present and near future levels of production of high quality fruit, a ready market for the total supply of the independent republics in the Caribbean area will be found in the United States and Canada.

TABLE I

WORLD EXPORTS OF BANANAS  
(million stems)(a)

Exporting Country	Average 1934/38	1945	1946	1947
Jamaica	14.82	1.26	4.19	3.96
Honduras	12.35	13.14	14.18	15.21
Mexico	12.23	3.50	5.04	5.64
Panama(b)	9.57	3.60	7.27	6.38
Brazil	8.71	2.59	4.18	5.93
Guatemala	7.37	8.55	9.76	14.88
Colombia	7.12	1.32	1.82	2.00
Canary Islands	5.73	2.80	4.03	4.00
Cuba	5.32	1.16	1.95	1.94
Costa Rica	4.22	2.48	4.92	6.10
Nicaragua	2.17	0.01	0.19	0.20
Ecuador	2.10	0.76	1.50	2.98
Guadeloupe	1.55	0.46	0.84	1.00
Martinique	1.19	-	0.14	0.60
Haiti	0.49(c)	2.41(c)	3.53(c)	4.38(c)
Dominican Republic	0.09	0.97	1.22	0.93
Other	15.05	1.98	3.18	5.35
<b>WORLD TOTAL</b>	<b>109.31</b>	<b>46.99</b>	<b>67.94</b>	<b>81.48</b>
(percentage of World Totals)				
Jamaica	13.56	2.68	6.17	4.86
Honduras	11.30	27.96	20.87	18.67
Mexico	11.19	7.45	7.42	6.92
Panama(b)	8.75	7.66	10.70	7.83
Brazil	7.97	5.51	6.15	7.28
Guatemala	6.74	18.20	14.37	18.26
Colombia	6.51	2.81	2.68	2.45
Canary Islands	5.24	5.96	5.93	4.91
Cuba	4.87	2.47	2.87	2.38
Costa Rica	3.86	5.28	7.24	7.49
Nicaragua	1.99	0.02	0.28	0.25
Ecuador	1.92	1.62	2.21	3.66
Guadeloupe	1.42	0.98	1.24	1.23
Martinique	1.09	-	0.21	0.74
Haiti	0.45	5.13	5.20	5.48
Dominican Republic	0.08	2.06	1.80	1.14
Other	10.09	4.21	3.66	6.45
<b>WORLD TOTAL</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

(a) The data represent stems converted to a uniform "bunch" of 50 lbs.

(b) Including Canal Zone.

(c) Year beginning October 1.

Source: International Institute of Agriculture.  
US Department of Agriculture.

TABLE II

DISTRIBUTION OF BANANA EXPORTS, 1937 and 1946  
(percent)

Exporting Country	United States		Canada		United Kingdom		Germany		Netherlands		Spain		Argentina		Others	
	1937	1946	1937	1946	1937	1946	1937	1946	1937	1946	1937	1946	1937	1946	1937	1946
Jamaica	-	-	10	-	74	100	2	-	14	-	-	-	-	-	-	-
Brazil	-	-	-	-	17	-	1	-	-	-	-	-	74	76	7(a)	24(a)
Canary Islands	-	-	-	-	16	35	37	-	1	-	34	58	-	-	11(b)	7(b)
Colombia	76	90	-	-	-	-	20	-	1	-	-	-	-	-	2(c)	10(c)
Costa Rica	92	99	1	1	3	-	1	-	3	-	-	-	-	-	-	-
Cuba	100	99	-	-	-	-	-	-	-	-	-	-	-	-	-	1
Guatemala	99	97	-	-	1	-	-	-	-	-	-	-	-	-	-	3
Honduras(e)	91	85	-	13	1	1	1	-	5	-	-	-	-	-	-	1
Mexico	100	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nicaragua	99	100	-	-	-	-	-	-	-	-	-	-	-	-	1	-
Panama	99	82	1	-	-	-	-	-	-	-	-	-	-	-	-	18(d)

(a) 1937 - Uruguay 7; 1946 - Uruguay 15, Sweden 7 and Belgium 2.

(b) 1937 - Denmark 3, France 1, Belgium 5 and Tunis 2; 1946 - Sweden 2 and Switzerland 4.

(c) 1937 - Panama 2 (probably transhipped to United States); 1946 - Sweden 7 and Belgium 3.

(d) To European and Canadian markets.

(e) 1946 figures, September 1946 - June 1947 year.

Source: Imperial Economic Committee.

OFAR, US Department of Agriculture.

TABLE III

WORLD IMPORTS OF BANANAS  
(million stems)(a)

Importing Country	Average 1934/38	1945	1946	1947
United States	59.50	36.86	46.63	54.18
Canada	2.49	3.65	4.86	3.81
United Kingdom	13.07	-	4.55	4.65
France	7.52	-	1.10	3.77
Germany	5.28	-	-	-
Spain	2.28	2.34	1.52	2.00
Netherlands	1.37	-	-	0.01
Belgium	0.99	-	-	-
Italy	0.85	-	-	-
Argentina	6.39	2.11	3.17	4.54
Other	9.41	1.94	2.67	3.92
WORLD TOTAL	109.15	46.90	64.50	76.88
		(percent)		
United States	54.51	78.59	72.29	70.47
Canada	2.28	7.78	7.53	4.96
United Kingdom	11.97	-	7.05	6.05
France	6.89	-	1.71	4.90
Germany	4.84	-	-	-
Spain	2.09	4.99	2.36	2.60
Netherlands	1.26	-	-	0.01
Belgium	0.91	-	-	-
Italy	0.78	-	-	-
Argentina	5.85	4.50	4.91	5.91
Other	8.62	4.14	4.15	5.10
WORLD TOTAL	100.00	100.00	100.00	100.00

(a) The data represent stems converted to a uniform "bunch" of 50 lbs.

Source: International Institute of Agriculture,  
US Department of Agriculture.

TABLE IV

SOURCES OF BANANA IMPORTS INTO THE  
UNITED STATES AND UNITED KINGDOM  
(percent)

## A. United States

Exporting Country	Average 1934/38	1946	1947
Mexico	24.0	15.3	12.7
Honduras	19.6	19.0	22.9
Guatemala	11.8	18.9	19.4
Panama	11.7	6.5	5.7
Cuba	10.4	8.1	7.3
Colombia	6.4	3.5	3.4
Costa Rica	6.3	9.9	10.4
Nicaragua	4.2	0.5	0.7
British West Indies(a)	0.8	-	-
Other	4.8	18.3	17.5
TOTAL	100.0	100.0	100.0

## B. United Kingdom

British West Indies(a)	63.4	48.0	59.6
Central & South America	26.7	-	-
Canary Islands	3.1	46.1	24.0
Other	1.8	5.9	16.4
TOTAL	100.0	100.0	100.0

(a) Practically all from Jamaica.

Source: UK Trade Accounts  
Cmd. 2658  
Cmd. 3849

TABLE V

CARIBBEAN COUNTRIES IN WHICH BANANAS ARE AN  
IMPORTANT ITEM OF TRADE

Country	Percent of Banana Exports to Total Trade	
	1934/38 average	1947
Honduras	69.5	45.7
Panama	64.0	61.2(a)
Jamaica	56.0	16.0(a)
Guadeloupe	27.3(b)	n.a.
Guatemala	24.4	22.4
Costa Rica	23.5	22.7
Martinique	21.3(b)	n.a.
Nicaragua	18.6	1.6
Colombia	5.2	1.1(a)
Haiti	4.2(b)	19.4
Dominican Republic	0.2(b)	0.8

(a) 1946

(b) 1937 only

n.a. Not available.

Source: US Department of Commerce.