**Forecasters were** 

hurricane season, is

right-the 2007

an intense one.

Hurricane Dean

wrecked Antilles

banana production.

hard-hit in both the

**French West Indies** 

bananas should be

back in European

shops in February

2008. Demand is in a

growing phase and

alternative sources

of supply are being

sought. Both import

and retail prices are

rising.

and the ACP

countries in the

zone, but these

The plantations were

# The international banana market

### Hurricane Dean: major impacts on production in the Caribbean

Weather forecasters said so in the spring: the 2007 hurricane season would be considerably more intense than usual (index 185 for 2007 in comparison with an average of 151 from 1995 to 2006 and 100 from 1950 to 2000). Thus in the second half of August hurricane Dean swept right through the Caribbean before running out of

> Hurricane Felix, which formed in the south of the Caribbean arc at the beginning of September, headed west, finishing in Honduras. Likewise, hurricane activity in the Pacific has been major in August and September.

Loss of life has been infrastrucsevere ture has been badly damaged and the tribute paid bv Caribbean banana growing has been large. Equivalent situations have not been seen since Hurricane David in 1979, Allen in Martinique in 1980. Hugo in Guadeloupe in 1989 or, more recently, the major hurricanes that hit Jamaica in 2005 (Wilma and Dennis) and 2004 (Ivan and Charley).

#### Supply tension

France has lost all ongoing production in Martinique. The situation in Guadeloupe varies according to the zone, with losses of some 50%. In the week after Dean, shipments from Guadeloupe were down by 60% and those from Martinique were down to nothing. Losses by volume in Martinique in 2007 alone are some 80 000 to 100 000 tonnes. Production potential for 2008 is reported to be down by about 50%, giving a production forecast of some 100 000 tonnes.

In the Caribbean ACP countries, damage was just as serious in Jamaica, with reports of 100% destruction of the plantations. CBEA estimates for the Windward Islands report overall losses of 50%, reducing weekly exports from 1 000 to a little less than 500 tonnes, with losses of 80% in



Dominica, 60% in St Lucia and 5% in St Vincent.

The situation in Belize, a large ACP supplier that shipped 73 000 tonnes to the EU in 2006, was uncertain for quite a while, but the banana plantations are in the southern part of the country and production was finally not affected. However, as the hurricane swept into the Yucatan peninsula towards the frontier between Mexico and Belize, it seems to have damaged the Mexican plantations whose production is sold almost only on the domestic market.

The next hurricane was Felix that crossed the southern part of the Caribbean, careered through Nicaragua and then faded in Honduras and caused serious loss of life and large-scale damage; however, it does not seem to have affected banana production potential. If it had, the effects on world markets would

have been substantial. Indeed, Nicaragua and neighbouring Honduras in particular export some 500 000 tonnes of banana to the UE and the USA each year.

By the end of 2007, the shortfall in bananas from the Caribbean on the European market will have totalled nearly 100 000 tonnes, that is to say about 6% of EU supplies from all origins (calculation based on 2006 statistics). The figure will doubtless be revised in the coming weeks as uncertainty in early damage assessment is considerable.

Quite apart from the effects of the hurricane, the production context is morose. The dollar zone will be unable to make up the deficit immediately. The cold weather forecast in Brazil, serious flooding and high winds in Colombia and something of a dip in production in Ecuador will all reduce supplies on the international market. All this is over and above the high winds in Cameroon and the Dominican Republic at the beginning of the

Impacts on markets are clearly visible but not on the scale expected by some observers. However, import prices in Europe increased by more than EUR 2.00 per box in the days following the hurricane, reaching nearly EUR 14.00 per box, a rise of 20%. The effects on retail

summer.

prices were seen later as they were retarded by special offers on bananas announced at prices that were very low or even too low in the light of quay prices. Retail prices of EUR 0.69 per kg (EUR 12.50 per box) were frequently observed, and this was well below the import price! Retail prices only began to rise seriously towards mid-September, like those in British supermarkets, where they took off from their eternal £0.75 level and reached or even exceeded £1 per kg.

Export 2006 to EU

Export 2006 to USA

% of plantations destroyed (estimates)

### Demand strong and firm

EU 73 207 t US 0 t

FRuiTROP

In addition to the immediate psychological effect that is well-known on the international market for agricultural raw materials, this event took place in a buoyant world context for banana. Demand in the United States, the EU and Russia is running world production capacity out of goods. In the first half of 2007, demand in the US and Europe increased by 5 to 7%. That in Russia increased by 8%. This had never been seen before!

The supply programmes set up by operators everywhere in Europe this summer were cautious, so as not to endure a repeat of the nasty losses of summer 2006. The market thus appears to be comparatively clear. In addition, the so-called 'summer' in northern Europe created the right conditions for a good resumption of consumption at the end of August. The supply gap caused by hurricane Dean called the strategies of many groups into question, particularly on the French and British markets as these were the destinations of much of the

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production of the flattened plantations. Paying Paul inevitably means robbing Peter. Africa, in coordination with French producers, will temporarily, and with the limit of capacity, take the place left by West Indian bananas, especially in France, but there will be a strong domino effect throughout Europe. It is of course in the interest of Africa and French producers not to leave the road open to dollar bananas that have a minority market share in France for the moment (18% in 2006, see *FruiTrop* 145 page 11).

Uraba: wind

Magdalena: flooding

Banana — French West Indies Major climatic phenomena		
	Martinique	Guadeloupe
1950		Baker
1951	Charlie, Dog	
1956		Betsy
1958	Ella	
1959		Edith
1961		Frances
1963	Edith	Helena
1964		Cleo
1966		Inez
1967	Beulah	
1970	Dorothy	
1979	David	David
1980	Allen	
1981		Gert
1988	Gilbert	Gilbert
1989		Hugo
1993	Cindy	
1994	Debby	
1995	Iris, Marilyn	Iris, Luis, Marylin
1996	Hortense	Hortense
1998		Georges
1999	Lenny	Lenny
2007	Dean	Dean
Source: Météo France		

Different effects are observed in European and ACP production zones. French production is particularly hard-hit as the disaster, and also the resulting gap in supplies, struck during a period of reconquest of its natural market—France. Indeed, West Indian bananas had been steadily gaining market shares for several months in a context in which Cameroon had also suffered serious losses in early June.

Brazil: cold weather

Source: Cirad FruiTrop

At the production level, replanting is very costly. Producers can comfort themselves a little by observing that the hurricane smashed most plantations 'cleanly'. Indeed, the wind broke pseudostems without causing too much damage to corms. Planters already growing bananas when hurricane Hugo hit in 1989 remember that restarting was very difficult as destruction could be described as messier. This time, after cleaning, choice of a dominant sucker and appropriate phytosanitary treatment, they can hope to start packing fruits again by the end of February 2008. They must also opt for a replanting strategy combining the fastest possible return to the market, packing capacity and the spreading of supply in time in order to benefit from the best prices (see following page).

It is to be hoped that the aid promised both by the EU for ACP growers and by France for its own growers will be released rapidly. We also hope that this marks the end of a dramatic hurricane season

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### Gestion technique du redémarrage des plantations de banane après le passage du cyclone Dean aux Antilles

Les équipes de recherche du Cirad et celles des groupements de producteurs de banane

des Antilles ont rédigé une fiche technique proposant les bonnes pratiques agricoles à mettre en place en vue d'un redémarrage de la production dans les meilleures conditions (rapidité, étalement de la production, gestion des risques environnementaux, etc.). FruiTrop propose de larges extraits de ce guide. Ces bonnes pratiques agricoles tiennent compte de l'état particulier de la bananeraie après le cyclone Dean. Dans les parcelles atteintes par celui-ci, plus de 70 % des bananiers ont été

Photos © Cirad

cassés et moins de 30 % déracinés. La conséquence en est un état de la souche et des racines de bonne qualité.



Remise en état de la bananeraie

Parcelle avec moins de 25 % de pieds arrachés : cyclonage

• Dans le cas d'un pied cassé, ne pas cycloner trop court.

- Dans le cas de rejets de moins d'un mètre, possibilité de les laisser repartir du coeur en coupant sous la cassure.

 Pour les rejets plus grands non cassés, cyclonage rapide ou décalé selon les besoins, pour s'assurer d'une production de régimes de qualité.

 Dans le cas d'un pied arraché sur les parcelles qu'on relève et en fonction de l'état de la souche, faire le choix de replanter la souche en conservant un rejet de moins d'un mètre (ou un oeilleton si le rejet est déjà tordu) ou conserver deux rejets opposés sur une souche voisine.

## Parcelle avec plus de 25 % de pieds arrachés : destruction rapide des souches et mise en jachère

Il faut impérativement éviter de créer des foyers de charançons, de nématodes ou de cercosporiose. Pour cela, détruire le plus rapidement possible les parcelles qui ne seront pas relevées.





### Prévention des risques d'infestation du charançon

Il faut détruire les souches non replantées et débiter les pseudotroncs afin de ne pas créer de foyers d'infestation de charançons.

Sur les parcelles cyclonées : une action prophylactique et un raisonnement des traitements

- Réaliser un décorticage sur les souches arrachées pour avoir une idée de l'infestation par parcelle.
- Si moins de 10 % de pieds attaqués : pas de traitement contre le charançon.

- Si plus de 10 % de pieds attaqués : réaliser un traitement contre le charançon.

 Dans tous les cas, assurer un suivi des populations de charançons. Installer un piégeage à sordidine pour avertissement (4 pièges/ha). Le traitement est déclenché s'il y a plus de dix charançons par piège et par semaine.

Sur les parcelles détruites et mises en jachère, il faut impérativement piéger en bordure des parcelles afin de limiter la dissémination des charançons (ceinture avec un piège tous les 20 mètres).



#### Maîtrise de l'enherbement

Il faut que les parcelles soient les moins enherbées possible à l'entrée de la saison des pluies et donc intervenir dès les premières repousses.

### **Apport d'engrais**

L'important retour de matière organique au sol va tamponner les éventuels à-coups de fertilisation. Cependant, assurer le redémarrage de la parcelle par un apport d'engrais puis reprendre une fertilisation classique.

### Planification du retour en production

La reprise de la production devra être correctement répartie sur plusieurs mois afin de limiter les pics de production.

- Un premier réglage peut avoir lieu au moment de l'oeilletonnage, mais son incidence sera faible.
- On peut essayer de conserver un décalage entre parcelles.
- Dans trois mois, on pourra envisager de recycloner des rejets.
- A partir du moment où la capacité d'usinage est dépassée, supprimer des fleurs au stade fleur pointante (décalage de 5 mois minimum).

Les replantations devront également être ciblées. La technique de plantation en basse densité peut aussi permettre de décaler une partie des volumes.