



### Producer country sheet

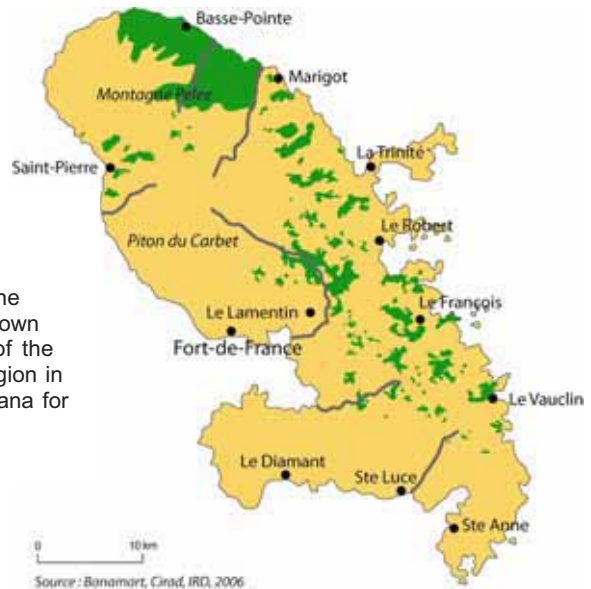
## Banana in Martinique

Sheet compiled using data and analyses provided by Odeadom, CIRAD and Iedom.

### Location

It is less than a century since Martinique switched to growing bananas, that are shipped solely to the European Union. The Cavendish variety forms nearly 98% of production and is grown on more than 6 500 ha, mainly in the north-eastern part of the island in the Lorrain and Marigot zone and in the Vauclin region in the south-east. Forming less than 2% of production, fig banana for the local market is grown on about 300 hectares.

Banana growing is the main agricultural occupation in Martinique in terms of farmed area, the number of holdings, production, the generating of agricultural income and job creation. Nearly 10 000 jobs are directly or indirectly related to the sector.



Banana — Martinique — Areas and production				
	2003	2004	2005	2006
Number of farms	688	659	625	577
Banana UFS (ha)	8 670	8 498	7 543	7 209
Total UFS (ha) (*)	31 268	28 892	26 033	25 401
Ratio banana/total UFS (%)	28	29	29	28
Marketed production (t)	243 706	246 199	226 243	220 775
Yield (t/ha)	29.2	28.8	29.9	30.4

\* UFS: Useful Farm Space / Source: DAF Martinique, European Commission

### Production and exports

Farming is very specialised in Martinique. Banana growing, accounting for the greater part of agricultural added value (43% against 4% for sugar cane) was developed strongly after the collapse of sugar prices at the end of the 1960s. Nearly 5% of the working population and 49% of agricultural labour work in this sector—the main employer in nearly 60% of the island's communes. Farming a hectare of banana requires an average of 0.7 labour unit. Some 6 066 persons worked in the banana plantations in 2005. Most of the workers are employed on a permanent basis.

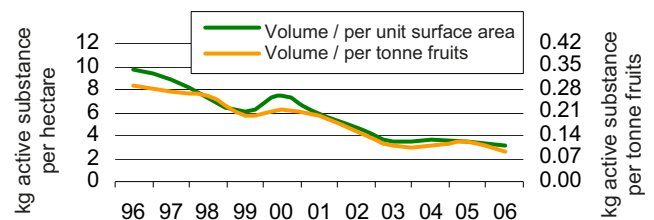
In 2006, there were 577 plantations, 172 fewer than in 2001. Most of the closures have concerned small and medium-sized plantations with areas ranging from less than 5 to more than 10 hectares and located in the north. The phenomenon is probably the result of on the one hand the setting up of the contrat de progrès (signed between professionals and the government in 2004) favouring the retirement of small farmers and on the other of the absence of economies of scale. Banana plantations have proportionally gained a larger share of the agricultural area of the island in the last five years. In addition, an increasing proportion of farms are becoming devoted to banana growing. In 2006, nearly 18% of farms were banana plantations against 11.1% in 2001.

The average yield increased from 26.3 tonnes per hectare in 2001 to 30.4 tonnes in 2006. The trend is correlated with the increase in average farm size from 12 hectares in 2001 to 12.5 hectares in

2006. The 64 large plantations of more than 50 hectares recorded an average yield of 33.7 tonnes per hectare in 2005 and accounted for 67% of the tonnage, while forming hardly 11% of farms. In contrast, the 289 small farms with less than five hectares, that is to say 50% of farms, had an average yield of 16.3 tonnes per hectare and produced 6% of the tonnage.

Like all European farming, banana growing in the French West Indies is subjected to strict regulations concerning respect of the environment and the use of pesticides. Growers' efforts, supported by the research sector and government services, have made it possible to set up integrated cropping systems that combine a weather watch, pathogen monitoring, crop rotation (especially with sugar cane), fallow, use of in vitro planting material that is free of nematodes, biological control and a search for varieties with more resistance to pathogens, leading growers to considerably reduce pesticide application (a reduction of 50% in 10 years). These results make Martinique and the French West Indies a zone with among the best environmental performance. The next agronomic challenge will be the application in the months to come of stricter rules for aerial spraying. However, the great threat feared by all growers is the arrival of Black Sigatoka disease caused by a highly pathogenic fungus that would endanger banana production.

#### Banana - Martinique - Evolution of the use of pesticides Insecticides and nematicides



Source : Chabrier et al, Phytoma 2005, 584 (7-8)

# SA QUALITÉ UNIQUE N'EST PAS LE FRUIT DU HASARD.



*C'est grâce au travail de ce planteur et de ses équipiers que la Banane de Guadeloupe et Martinique développe une qualité unique : soin minutieux et dévouement quotidien, voilà les clés de son succès. Un succès qui sera au rendez-vous dans vos rayons. Pensez à elle ! Pour en savoir plus :*

**[bananeguadeloupemartinique.com](http://bananeguadeloupemartinique.com)**



## BANANE DE GUADELOUPE ET MARTINIQUE

**RIEN NE PEUT LA BATTRE**

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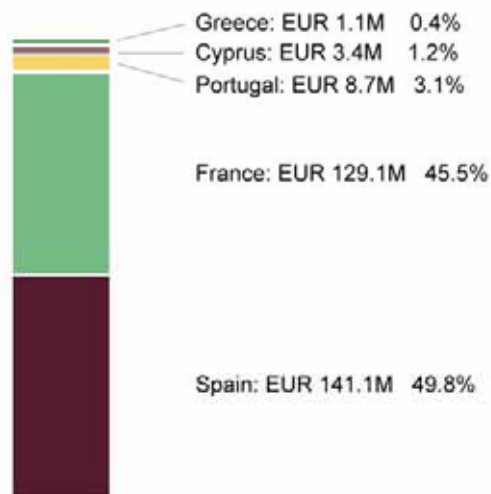


CAMPAGNE CO-FINANÇÉE PAR L'UNION EUROPÉENNE  
ET L'OFFICE DE DÉVELOPPEMENT DE L'ÉCONOMIE AGRICOLE DES DÉPARTEMENTS D'OUTRE-MER





### Banana - Aid for European producers POSEI and single payment



Note:  
POSEI: EUR 278.8M for the Canary Islands, Martinique, Guadeloupe and Madeira  
Single payment system: EUR 4.6M for Greece, mainland Portugal and Cyprus

### Support system

Since 1993, the EU has supported the European banana sector by providing financial aid for production and investment. This is performed within the framework of the common market organisation of banana (CMOB) and the social cohesion policy. Thus on the latter point, the 2000-2006 budget document (DOCUP) enabled the validation of 773 requests for financing by the budget and monitoring committee (Comité de programmation et de suivi) for a total of EUR71.6 million, funded mainly by the growers themselves, with 31.3% by the European Union (European Agricultural Guidance and Guarantee Fund, EAGGF) and 14.1% from national bodies.

The community production support system set up by the EU right at the beginning of the CMOB was reformed in 2006. The old system of compensatory aid for loss of income was based on calculation of the difference between the selling price on the European market and production cost in the European production zones. The reform led to separating the aid paid from the selling price. Since 2006, some EUR278.8 million, including 129.1 million for Guadeloupe and Martinique, has been paid to European growers within the framework of the POSEI programmes that include specific measures for ensuring the continuity and development of local agricultural production in extremely remote regions, taking their specific handicaps into account. Planters must maintain a minimum production level to receive aid corresponding to 100% of their historical reference.

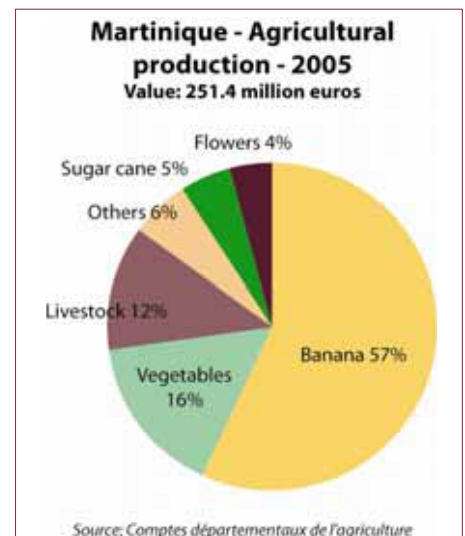
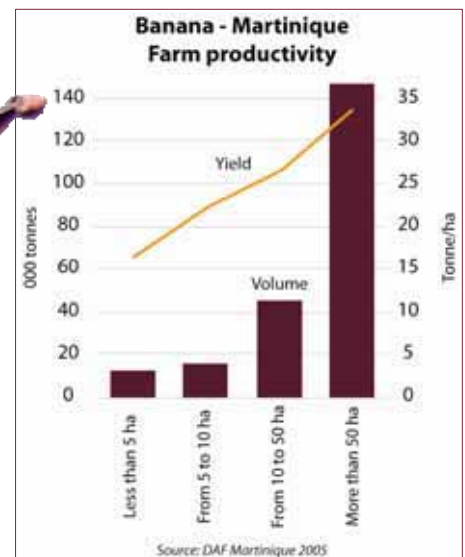
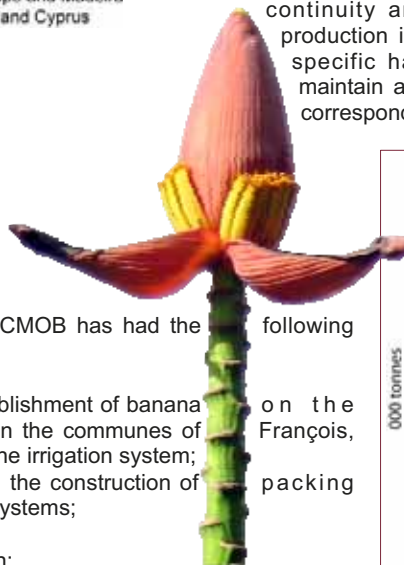
### Organisation

According to professionals, the establishment of the CMOB has had the following effects in particular:

- the redeployment of cultivated land, with the re-establishment of banana on the fertile land in the south of the island, in particular in the communes of Saint-Esprit and Vauclin, thanks to the extension of the irrigation system;
- the restructuring of farms, with an increase in area, the construction of packing stations and the improvement of road and irrigation systems;
- improved yields;
- the development of integrated and organic production;
- the reorganisation of the profession.

A major event in the organisation of the profession was the founding in September 2003 of the Union des groupements de producteurs de bananes de Guadeloupe et Martinique (Ugpban) that now combines the two Martinique groups and the Guadeloupe group Les Producteurs de Guadeloupe (Lpg). While there were four groups of planters in Martinique in 2004 (Sicabam, Gipam, Cobamar and Banalliance), banana production became centred on two producers' organisations in 2006: Banamart, the product of the merging of Sicabam and Gipam in 2005, with the grouping of 420 planters (more than 90% of production), and Banalliance, founded in 1996, with 157 members and accounting for about 7% of production. The Cobamar group filed for bankruptcy at the end of 2003 and its members were divided between Banamart and Banalliance. The three groups provide direct support for planters in both islands in the agricultural techniques, purchasing, finance and human resources.

Ugpban handles the promotion and marketing of bananas from Guadeloupe and Martinique on the European market, forming 94% of production. With joint funding by growers (41%), the French government and EU funds (EUR9 million in 2005-2006-2007), Ugpban launched a vast advertising campaign for banana, using the 'Banane de Guadeloupe et Martinique, rien ne peut la battre'. The bananas from the two islands are divided into three product lines: 'banane planteur', 'banane montagne' and 'banane pays'. Today, 60% of banana production in Martinique is certified. The references used are: Agriculture raisonnée (France), GLOBALGAP (Europe) and Tesco Nature's Choice (United Kingdom). All bananas from Guadeloupe and Martinique bear a logo awarded by the European Commission attesting the origin and character of the production environment.

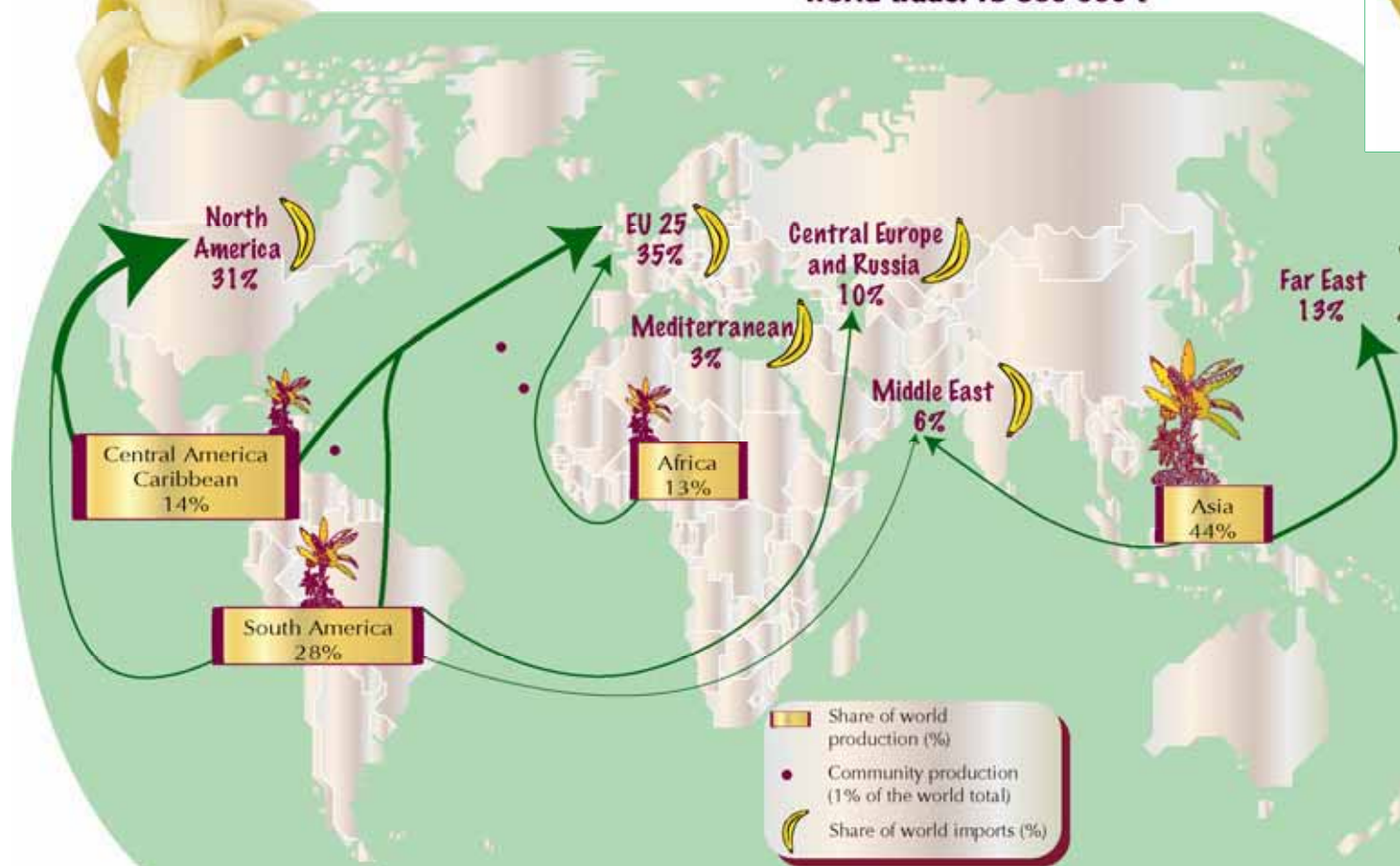


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# Dessert banana...

production: 61 000 000 t

world trade: 13 800 000 t



Banana — United States imports

tonnes	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>Total, incl.</b>	<b>3 913 322</b>	<b>4 291 425</b>	<b>4 030 618</b>	<b>3 840 624</b>	<b>3 906 920</b>	<b>3 879 151</b>	<b>3 872 826</b>	<b>3 824 409</b>	<b>3 839 467</b>	<b>4 003 800</b>
Guatemala	654 617	501 918	688 448	832 106	925 216	934 136	1 020 765	1 029 280	912 902	1 093 391
Costa Rica	1 090 973	1 603 844	1 361 405	1 082 088	901 485	976 078	865 298	822 731	927 361	1 036 897
Ecuador	1 080 124	1 169 467	975 960	946 584	1 021 830	972 475	918 926	904 306	994 335	929 175
Honduras	377 009	83 668	275 603	381 540	449 171	432 145	507 914	453 011	422 905	482 732
Colombia	415 116	605 819	602 836	473 784	506 441	469 306	464 592	513 748	473 826	377 232
Nicaragua	58 355	39 712	1 906	28 198	29 702	41 620	41 502	38 067	30 465	32 788
Mexico	220 582	140 802	85 123	63 809	42 339	35 197	33 586	33 796	38 573	31 508
Peru	-	-	302	5 656	23 196	13 756	12 384	22 345	25 056	17 848
Dom. Rep.	6 387	11 733	6 437	7 355	3 573	2 136	5 201	4 437	6 213	1 720
Panama	5 391	130 973	28 707	16 187	259	215	612	2 019	7 516	502
Venezuela	4 519	3 471	3 852	3 283	3 684	1 930	2 008	670	317	-

Source: US customs, code 0803002020 (excl. plantain)

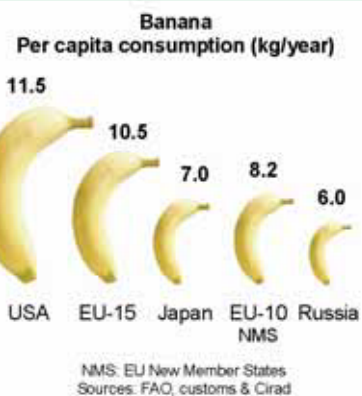
Banana — Japanese imports

tonnes	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>Total, incl.</b>	<b>864 853</b>	<b>983 204</b>	<b>1 078 655</b>	<b>990 554</b>	<b>936 272</b>	<b>986 643</b>	<b>1 026 014</b>	<b>1 066 873</b>	<b>1 043 634</b>	<b>970 594</b>
Philippines	620 342	727 071	811 000	781 413	743 549	795 561	869 641	944 467	910 600	878 962
Ecuador	158 117	197 186	210 820	170 643	157 013	145 578	122 718	91 099	101 343	52 067
Taiwan	56 240	44 655	42 274	25 178	25 074	33 518	18 226	15 100	15 862	18 868
Peru	-	-	-	-	-	110	3 216	4 027	4 272	7 560
Mexico	1 798	1 722	1 394	2 044	2 562	3 057	3 303	3 739	3 948	4 611
Colombia	-	-	439	166	1 483	2 194	1 926	2 328	1 964	2 892
China	6 440	8 939	3 428	5 740	3 814	2 736	3 609	2 844	1 580	2 249
Thailand	675	900	1 332	1 513	1 252	1 793	2 204	1 794	2 373	2 089
Dominica	670	1 675	1 986	1 409	1 461	2 093	1 171	1 476	1 633	1 128

Source: Japanese customs, code 080300100

Banana - EU import by entry point



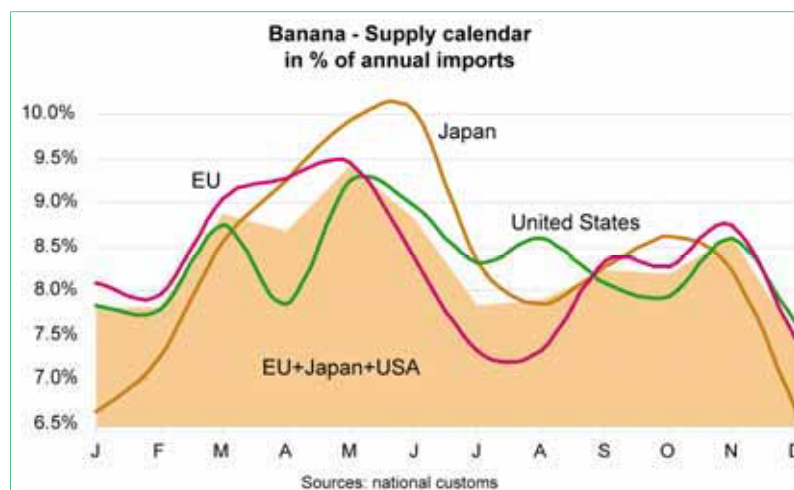


Banana World production - Tonnes			
2006	Cavendish	Other dessert	Total
<b>World</b>	<b>46 620 128</b>	<b>12 339 269</b>	<b>58 959 397</b>
India	7 358 600	2 019 00	9 377 600
Brazil	3 104 731	3 500 000	6 604 731
China	5 950 000	642 000	6 592 000
Ecuador	5 150 000	518 425	5 668 425
Philippines	3 300 000	993 000	4 293 000
Indonesia	1 790 000	887 608	2 677 608
Colombia	2 000 000	500 000	2 500 000
Costa Rica	2 080 000	133 618	2 213 618
Mexico	1 810 000	70 000	1 880 000
Guatemala	1 270 000	10 000	1 280 000
Egypt	875 999	1 000	876 999
Cameroon	600 000	260 000	860 000
Thailand	601 000	223 850	824 850
Bangladesh	555 000	210 710	765 710

Banana World exports	
2006	tonnes
<b>World</b>	<b>13 800 000</b>
Ecuador	4 402 395
Costa Rica	1 961 102
Philippines	1 908 328
Colombia	1 519 388
Guatemala	943 616
Honduras	444 673
Panama	320 494
Canaries	294 131
Cameroon	260 000
Côte d'Ivoire	245 000
Martinique	219 556
Brazil	212 210
Dom. Rep.	200 000
Belize	73 207

Banana World imports	
2006	tonnes
<b>World</b>	<b>13 800 000</b>
<b>EU-25, incl.</b>	<b>4 838 000</b>
Belgium	1 141 026
UK	855 684
Germany	853 938
Italy	513 181
France	442 570
United States	3 839 467
Japan	1 043 634
Russia	858 124
Iran	450 860
Canada	449 000
China	429 000
Argentina	302 000
South Korea	254 000

Sources: Thierry Lescot, FAO, EU, US and Japanese customs



Banana — European Union imports																
000 tonnes	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>Total</b>	<b>3 751</b>	<b>3 612</b>	<b>3 414</b>	<b>3 810</b>	<b>3 954</b>	<b>3 902</b>	<b>3 796</b>	<b>3 931</b>	<b>4 070</b>	<b>3 973</b>	<b>4 073</b>	<b>4 121</b>	<b>4 609</b>	<b>4 371</b>	<b>4 838</b>	<b>5 231</b>
<b>Total EU, incl.</b>	<b>705</b>	<b>642</b>	<b>585</b>	<b>657</b>	<b>685</b>	<b>811</b>	<b>785</b>	<b>730</b>	<b>782</b>	<b>768</b>	<b>791</b>	<b>755</b>	<b>750</b>	<b>648</b>	<b>642</b>	<b>552</b>
Canaries	349	331	322	369	346	404	437	362	398	421	407	401	418	345	348	358
Martinique	198	181	152	188	250	277	240	259	271	234	264	244	246	226	221	129
Guadeloupe	115	97	82	63	61	98	74	84	88	89	95	86	59	54	48	40
Madeira	35	26	26	34	24	28	30	22	22	21	22	21	21	14	15	17
Cyprus	-	-	-	-	-	-	-	-	-	-	-	-	3	6	7	5
Greece	8	7	3	3	4	4	4	3	3	3	3	3	3	3	3	3
<b>Total dollar, incl.</b>	<b>2 367</b>	<b>2 220</b>	<b>2 102</b>	<b>2 387</b>	<b>2 466</b>	<b>2 395</b>	<b>2 393</b>	<b>2 520</b>	<b>2 475</b>	<b>2 455</b>	<b>2 579</b>	<b>2 509</b>	<b>3 074</b>	<b>2 959</b>	<b>3 290</b>	<b>3 842</b>
Ecuador	675	605	549	632	686	738	568	695	674	705	829	800	993	1 059	1 026	1 184
Colombia	500	418	461	557	653	569	541	554	617	645	665	673	763	878	948	1 154
Costa Rica	452	480	622	564	604	603	640	663	657	634	686	725	840	623	825	970
Panama	471	413	299	416	311	358	417	422	389	348	307	303	368	281	311	354
Brazil	0	0	0	0	0	2	1	5	13	17	36	50	52	63	96	86
Peru	0	0	0	0	0	0	0	0	0	1	7	6	10	12	23	34
Honduras	195	194	27	56	114	70	151	68	108	106	20	11	18	19	18	30
Guatemala	33	27	20	58	62	58	61	42	30	3	0	2	2	3	27	19
Venezuela	0	0	1	13	18	30	30	42	18	12	9	12	23	17	15	10
<b>Total ACP, incl.</b>	<b>679</b>	<b>750</b>	<b>727</b>	<b>766</b>	<b>803</b>	<b>696</b>	<b>618</b>	<b>681</b>	<b>760</b>	<b>730</b>	<b>727</b>	<b>787</b>	<b>785</b>	<b>764</b>	<b>906</b>	<b>837</b>
Cameroon	110	147	158	165	167	157	116	161	206	216	230	293	262	253	259	222
Dominican Rep.	38	62	86	75	61	49	56	42	60	86	97	109	101	145	177	206
Côte d'Ivoire	144	161	149	160	181	166	158	192	200	218	211	202	211	184	228	190
Belize	28	39	47	41	54	53	53	56	68	52	38	74	80	74	73	61
Surinam	30	28	33	28	26	29	21	39	34	29	7	0	19	35	45	54
Ghana	0	0	0	2	3	3	4	3	3	3	3	1	2	4	24	33
Saint Lucia	122	113	92	101	107	71	70	66	73	35	49	33	43	28	36	30
Jamaica	75	77	76	84	89	77	62	52	41	43	41	42	29	12	32	18
Saint Vincent	71	58	32	48	44	30	39	38	43	31	33	21	24	15	17	14
Dominica	52	53	43	33	39	35	27	28	28	18	17	10	12	12	13	7

Note: May to December only for Cyprus in 2004 / From 1995, EU-15 / From 2004 to 2006, EU-25 / Since 2007, EU-2007 / Source: Eurostat



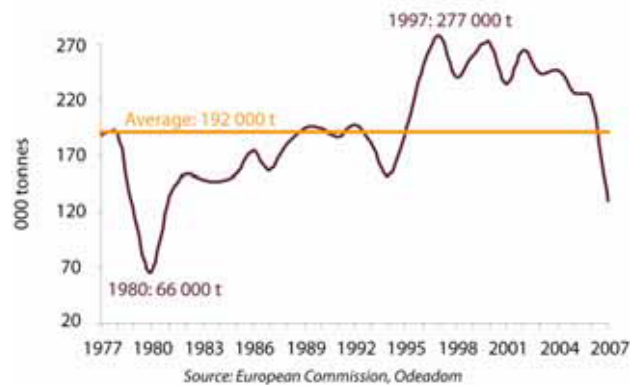
## Shipping

The second European producer after the Canary Islands, Martinique has shipped an average of 220 000 tonnes of banana to the EU for 20 years. The best score was 277 000 tonnes in 1997. Bananas from Martinique and Guadeloupe have a 40% share of the French market. About 25% of production is shipped to other destinations in Europe: Spain, the United Kingdom, Germany, certain new member countries, etc. Last year was marked by the passage of hurricane Dean that destroyed all the banana plantations on 17 August. Bananas from Martinique returned to the European market at the beginning of April 2008, that is to say less than eight months after the catastrophe.



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Martinique - Marketed bananas



## Logistics

Producers in Martinique and Guadeloupe have joint logistics. The four container ships of the CMA-CGM shipping line (dedicated shipping on the Martinique-Guadeloupe-Dunkirk-Le Havre-Rouen-Montoir route) handle 100% of the transport of bananas to Europe on a weekly basis. The voyage lasts for 9 days, with departure from the West Indies on Saturday evening and arrival in Dunkirk on Monday. Two facilities unload the containers at the port of arrival and manage forwarding to ripening facilities.

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