



# Banana Trade News Bulletin

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## CONTENTS

<b>Editorial</b> .....	1
Equity Or Oligopoly? Not Just Words .....	1
<b>Issues: Producing countries</b> .....	2
Brazil: The New Giant? .....	2
Ecuador: Strike Brings Down Minister .....	2
Ecuador: Reports Of Continuing Expansion.....	2
Ecuador: Noboa Busts Unions After Hunger Strike...	3
Ecuador: Small Producers Abandon Land.....	3
...But Secure Deal With Israel .....	3
Ecuador: New Child Labour Code.....	3
Ecuador: Peruvian Migrants Push Down Wages .....	3
Guatemala: Chiquita Closes Four Farms.....	3
Guatemala: Union Threatened With Bankruptcy .....	4
Costa Rica: Less Exports, Less Jobs .....	4
Costa Rica: Ilo Reports Child Labour .....	4
Costa Rica: Indigenous Workers Demand Rights.....	4
Costa Rica Pioneers Organic Pesticide .....	4
Colombia: Diversification Efforts In Uraba.....	5
Honduras: Permanent Contracts Lead To New Union5	
Honduras: Independents Seek Fair Deal .....	5
Panama: Coop Faces Early Difficulties.....	5
Peru: Rapid Organic Expansion Predicted.....	5
Windwards: Production Falls, Price Falls.....	6
French Caribbean: Producers Form United Front .....	6
Cameroon: Expansion Jeopardised By Low Prices?..	6
Philippines: New Coops Score Double Victory .....	6
Keralan Farmers Cut Middlemen .....	6
Cuban Scientist Criticises Lack Of Control.....	7
Uganda: Gm Initiative Causes Controversy .....	7
Human Drugs To Kill Banana Virus .....	7
Residues Could Go Into Ethanol Production .....	7
<b>Issues: Consuming Countries</b> .....	7
The EU's Record Year .....	7
Fairtrade Sales Boost Producer Benefits.....	7
Companies And Governments Against EU Pesticide Bans .....	7
China: Philippines Displaces Ecuador.....	8
Importance Of Eurep-Gap "Blown Out Of Proportion" <sup>8</sup>	
<b>Special Feature</b>	
<b>Shipping: the crucial link</b> .....	8
<b>Issues: Policies</b> .....	10
<b>Companies and Institutions</b> .....	12

## Editorial

### EQUITY OR OLIGOPOLY? NOT JUST WORDS

An editorial in the Ecuadorian press on the first day of the nationwide producers' strike in mid-October concluded: *"It is important to investigate the identity of the interests which generate the wealth at every stage of the chain, as well as to observe the moves on the political chessboard in the search for equitable solutions or, on the contrary, for the foreseeable triumphs of oligopoly."*<sup>1</sup>

The penny seems to be dropping with producers everywhere that a powerful cocktail of overproduction, oligopoly and oligopsony<sup>2</sup> along the banana chain is going to drive them out of production. More and more voices in Ecuador and Costa Rica – responsible for half the world trade between them – see that greater equity for producers, notably in the shape of a stable and fair price, can only come about by finding methods to control production. At the consumer end, the rapid concentration of buying power in the hands of a few supermarket groups (see *Editorial BTNB 28*) also needs to be controlled by inter-governmental action.

The feature on shipping introduces us to another less well-known level of oligopoly in the chain, where the abuse of big market shares by a few players again spells bad news for producers.

In the long term, such concentrations of exporting, shipping or retailing power will almost certainly prove to be damaging for all concerned. In the short term, governments will have to 'bite the bullet' and realise that they can only achieve equitable solutions by seeking new alliances with those most affected by the prevailing economic injustice. Organised workers, small producers and concerned consumers already advocate

<sup>1</sup> *El Comercio*, Quito, 15/10/03

<sup>2</sup> Concentration of buyer power in the hands of a few

what the Quito editorial writer proposes: equitable solutions which reward all actors along the chain, not just those with the most economic power.

In the post-Cancún world, where it is clear that institutions need rethinking and that the marginalised will no longer put up with organised injustice, let us all give real meaning to the words which can all too easily serve as a substitute for changing our ways.



**Issues: Producing countries**

**BRAZIL: THE NEW GIANT?**

Brazil's re-entry into the world banana market is confirmed, as exports continue to grow. The FAO reports that exports in the first half of 2003 reached 126,000 tonnes, some 30% up on the first half of 2002. This is more than in the whole of 2001. According to some market analysts, producer prices were on average \$2.8 per box in 2002, compared to an average \$3.4 in Ecuador. Brazil has displaced Ecuador as the main supplier of Argentina and Chile. The European (mainly British) and US markets are being supplied from new plantations in Rio Grande do Norte and Ceará states in the Northeast, where Del Monte is the main foreign investor.

Sources: FAO Commodity Market Report, Sep 03; Banana Link.

**ECUADOR: STRIKE BRINGS DOWN MINISTER**

A banana producers' strike in mid-October, which almost brought exports to a halt for several days, claimed former Agriculture Minister Rodrigo Lasso as a direct victim. Lasso resigned over a disagreement with President Gutierrez about whether to call a state of emergency in El Oro province. He was replaced on 14<sup>th</sup> October by Sergio Seminario, a producer who sells to

Noboa; but, within hours, producers made the resignation of the new Minister a condition of ending their strike. The strike, which was supported by farmers from other sectors in three provinces, was over a number of issues, the most important of which is the continuing failure by many exporters to pay the legal minimum price of \$3.20 per 43 pound box. Some producers reported receiving prices of less than \$1 a box. The government has named offending exporters, but has not applied any sanctions against them. Noboa, the biggest exporter, has not been named by the government as an offender, although the new Minister himself confirmed to the press that he had received below the minimum price for his own bananas (see also Companies section). The strike ended on 18<sup>th</sup> October on its sixth day with promises by the government to enforce the minimum price and encouragement by the Exporters' Association (AEBE) to its members to pay it. As we go to press, Seminario remains Minister. President Gutierrez, who stood by his choice of new Minister, proposed converting 30,000 hectares of banana lands to other uses.

Sources: various Ecuadorian press, 13-23/10.

**PRICES IN DIFFERENT MARKETS, OCTOBER 2003**

Northern EU	\$18.66
Southern EU	\$17.03
US East Coast	\$5.75
Russia	\$6.00
Poland	\$5.25

Source: El Universo, 20/10

**ECUADOR: REPORTS OF CONTINUING EXPANSION**

The latest Agricultural Census in Ecuador confirms at least 30,000 hectares have been illegally planted since the expansion ban in 1997. Some reports indicate that aerial photos reveal even more illegal plantations continue to spring up. The new Minister of Agriculture, Sergio Seminario, has suggested that the best approach to reducing overproduction is to prohibit exports from these unregistered farms. This could mean as much as half a million boxes a week less.

Sources: El Comercio, Quito, 15-16/10.

## **ECUADOR: NOBOA BUSTS UNIONS AFTER HUNGER STRIKE**

Over a year after the violence at Noboa's Los Alamos plantation, the company sacked the remaining 70 unionised workers on 23rd June, following the filing of a petition by the three unions to start collective bargaining. When government attempts to get the company to appear before labour authorities failed, a group of workers went on 38-day hunger strike outside the Labour Ministry offices in Guayaquil. Noboa refused to take the workers back on, but did pay them severance pay plus an additional compensation payment due for workers sacked during the process of negotiation. The company has therefore managed to rid itself of the three unions and has set up 25 subcontracting companies, each with less than 30 workers in order to avoid future attempts to organise.

*Source: FENACLE and various press, Jun-Sep 03.*

## **ECUADOR: SMALL PRODUCERS ABANDON LAND...**

Recent government figures show that 2000 hectares of bananas belonging to small farmers in El Oro province have been abandoned in recent months because of the low prices farmers have been receiving. It is simply not worth harvesting bananas when they sell week after week at prices below the cost of production. Agricultural authorities are worried that the yellow and black sigatoka fungal diseases which take hold when farmers abandon bananas will start to affect other growers.

*Source: El Universo, Guayaquil, 25/09.*

## **...BUT SECURE DEAL WITH ISRAEL**

Small farmers with less than 20 hectares in El Oro province will sell 200,000 boxes per week to Israel. The agreement was made in September between the two governments. An inscription scheme for small farmers who wish to take advantage of this deal – and can guarantee that their farms are free of black sigatoka – is being set up in conjunction with the El Oro Banana Producers' Association (ABO). The government stated that the deal was one way of avoiding the "abuses of some exporters".

*Source: El Telégrafo, Quito, 15/09.*

## **ECUADOR: NEW CHILD LABOUR CODE**

Following the revelations of widespread child labour on Ecuador's plantations, including in highly hazardous jobs, the government, the ILO and the banana industry has been meeting

regularly to try and tighten up legislation governing child labour. In July, a new Child Labour Code came into force which raises the minimum age from 14 to 15, closes loopholes in the previous Code and introduces protective measures for 15 to 18 year olds. However, Human Rights Watch, which published the original revelations, does not believe that the government has adequate staff and systems in place to monitor compliance.

*Sources: FENACLE, Guayaquil; Human Rights Watch, New York; and Foreign & Commonwealth Office, London, Sep 03.*

## **ECUADOR: PERUVIAN MIGRANTS PUSH DOWN WAGES**

According to Ecuadorian immigration authorities, nearly 100,000 Peruvians crossed the border in the first seven months of 2003. It is estimated that 70% of them seek work in Ecuador. A Peruvian businessman explained that since dollarisation in Ecuador, daily wage rates can be up to double those in Peru. Reports from El Oro banana plantations indicate that Peruvians are prepared to work for as little as \$25 a week. This is likely to be one of the factors which have pushed wages back down in recent months in Ecuador.

*Sources: El Comercio, 18/08; El Universo, 30/08.*

## **GUATEMALA: CHIQUITA CLOSES FOUR FARMS**

Chiquita subsidiary COBIGUA has closed four of its 13 plantations in Izabal leading to the loss of about 500 jobs and the four local unions affiliated to national union UNSITRAGUA. This closure, which was done without prior notice to the workers, has fuelled fears that the company is gradually transferring all its production in Guatemala to non-union plantations on the Pacific coast. UNSITRAGUA denounced Chiquita's explanation of low productivity and general oversupply as false, accusing the company of deliberately planting at a lower density in order to justify the closure. UNSITRAGUA also complained that Chiquita has not respected the terms of the regional agreement it has with the trade unions by failing to consult over the closures.

*Source: Associated Press, Guatemala City, 14/09.*

## **GUATEMALA: UNION THREATENED WITH BANKRUPTCY**

Over 300 workers at Del Monte-owned plantation in Bobos have been left without work while the

company looks for a new operator to lease and run the plantation after the previous operator declared war on the SITRABI trade union. Sergio Monzon filed criminal and civil charges against the union which led to a court decision to put the union dues into escrow, threatening the solvency of SITRABI. International pressure has forced the government to defer the criminal charges, but the workers are still awaiting a new operator to take over before they can go back to work.

Source: US/LEAP, Guatemala City, Jul 03.

### **COSTA RICA: LESS EXPORTS, LESS JOBS**

Costa Rican exports continue to decline in volume terms, having fallen from 116 million boxes in 1999 to 89 million last year. This year the trend looks set to continue, with an accompanying drop in income. The decline has also meant a continuing loss of jobs, as the industry finds it harder and harder to compete with cheaper bananas from Ecuador, Brazil and West Africa. Official figures record a loss of 7,100 jobs since 1994, but unions claim this figure is much higher as it does not record the loss of casual jobs through sub-contractors.

Source: La Nación, San José, 27/06 and 08/08.

### **COSTA RICA: ILO REPORTS CHILD LABOUR**

A recent ILO report estimates there to be at least 113,000 under-age workers in Costa Rica, 50,000 of whom are classified as being employed in the "worst forms of child labour", including dangerous tasks such as agrochemical spraying and carrying bunches of fruit in banana plantations. Many are thought to be children of Nicaraguan migrants.

Source: La Nación, San José, 06/08.

### **COSTA RICA: INDIGENOUS WORKERS DEMAND RIGHTS**

In July, in the face of a backlog of unpaid wages and growing hunger because of lack of income, indigenous workers at Talamanca and Zavala plantations came out on strike. The company proceeded to sack over 40 of them who belonged to the UTRAL union. On 15th August, thanks to the support of their fellow trade unionists gathered in the Costa Rican Coordination of Banana Workers' Unions (COSIBA), an agreement to reinstate the workers was signed with the company in the Ministry of Labour. Since then, COSIBA has been actively supporting the indigenous communities to

prevent the Costa Rican immigration authorities from deporting indigenous workers who are union members back over the border into Panama.

Source: SITRAP, Siquirres, Sep 03.

### **COSTA RICA PIONEERS ORGANIC PESTICIDE**

Costa Rican scientist, Luis Sheik, has developed a non-chemical alternative to the highly toxic methyl bromide which has been tested on sigatoka-affected banana plants. The plant mixture he developed to combat diseases in melon and tomatoes has been named "terraorg" and could substitute completely for methyl bromide which has to be phased out by 2015 under the terms of the Montreal Protocol on ozone-damaging substances. Sheik, who is seeking patent protection on his invention, claims that trials on bananas proved the natural mix to be very effective.

Source: La República, San José, 20/08.

### **EU consumption by origin, 1991 – 2002**

('000 tonnes)

Country	1991	1995	1999	2002
<b>Third countries</b>				
Ecuador	646	632	697	829
Costa Rica	608	564	663	687
Colombia	518	557	555	666
Panamá	591	416	422	307
Honduras	181	56	68	20
Guatemala	18	58	42	0
Nicaragua	60	0	15	1
Venezuela	0	14	41	9
México	0	0	12	0
Brasil	0	0	4	36
Perú	0	0	0	5
<b>ACP</b>				
Ivory Coast	116	160	193	211
Cameroon	115	165	161	230
Windwards	225	187	132	100
Dom. Republic	10	75	42	97
Jamaica	70	84	52	41
Belize	20	41	56	38
<b>EU producers</b>	699	658	729	791
<b>Total EU consumption</b>	<b>3936</b>	<b>3955</b>	<b>3927</b>	<b>4078</b>

Source: EUROSTAT, Luxembourg, Sep 03

## COLOMBIA: DIVERSIFICATION EFFORTS IN URABA

The Colombian region of Urabá produces 70% of the country's bananas and until recently has been very dependent on this monoculture for its income. However, efforts to diversify into the production of beef, oilpalm, cassava, ornamental plants, cocoa and rubber are starting to pay off. Beyond agriculture the region is looking to export clothing – with a trial project involving 40 women making school uniforms, work overalls and sportswear – and to promote eco-tourism. Efforts to increase exports are however limited by the lack of adequate deep-water port facilities.

Source: *El Tiempo, Medellín, 07/10.*

## HONDURAS: PERMANENT CONTRACTS LEAD TO NEW UNION

The first new banana workers' union in Central America for many years has been registered in Honduras after a long struggle with the plantation owners to give workers permanent contracts. The SITRAMBA union at the Buenos Amigos plantation was set up after workers trying to form a union had been rebuffed last year on the grounds that they only had six month contracts and that their application was therefore not valid in Honduran law. However, sister unions pressured the company - which supplies Chiquita – pointing to the clause in Chiquita's agreement with unions across the region that guarantees the freedom to organise and they eventually granted 47 of the 300 or so workers permanent contracts. The union is the only one in the continent with both a woman President and General Secretary.

Source: *COSIBAH, La Lima, Jul 03.*

## HONDURAS: INDEPENDENTS SEEK FAIR DEAL

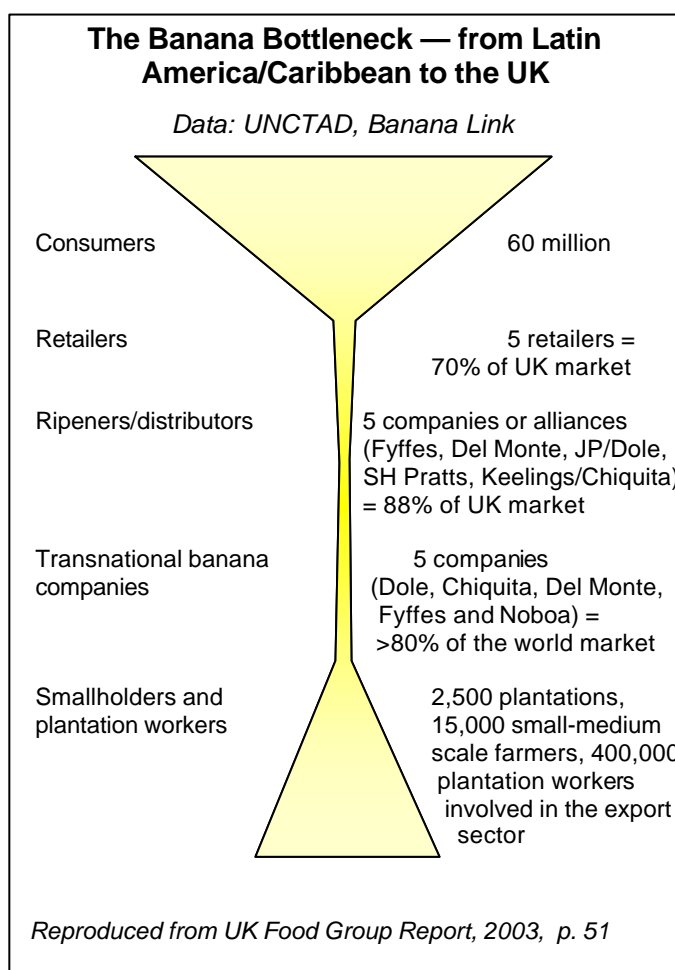
The Honduran Association of Banana Producers, PROBANA, is looking for sell directly to avoid their dependence on contracts with multinationals which are fixed at prices well below the costs of production. They would like to be able to "pay our workers decently and to offer them the social benefits from which they ought to be benefiting". Their members produce on 4000 hectares and have an exportable volume of some 8 million boxes a year.

For further information, contact: <rpellman@sigmanet.hn>

## PANAMA: COOP FACES EARLY DIFFICULTIES

Despite having achieved high quality exports, the workers' cooperative which took over the former Chiquita plantations on the Pacific coast of Panama still has problems with absenteeism, inherited from the days when Chiquita was the employer. COOPSEMUPAR initiated a campaign to explain to workers that they now own the company and that it is not in their interest to stay away from work. If the cooperative can tackle this problem, then they hope to reduce costs of production to less than the \$5 per box which Chiquita has contracted to pay and to expand the area in production.

Source: *La Prensa, Panama, 15/08.*



## PERU: RAPID ORGANIC EXPANSION PREDICTED

An adviser to the Peruvian Agriculture Ministry predicted that the 2000 hectares currently down to organic banana could be doubled in the short term, with productivity increasing all the time. In 2002, six companies exported 19,000 tonnes, although one of these accounted for two thirds of this total: COOPDEBAN, belonging to the Ecuadorian subsidiary of Dole. By October, the

head of the port authority at Païta confirmed predictions of 60,000 boxes per week by the end of 2003.

Source: *El Universo, Guayaquil, 30/08 and 02/09.*

### **WINDWARDS: PRODUCTION FALLS, PRICE FALLS**

Production has plunged in all four islands in the first half of 2003, from a total of 56,000 to less than 35,000 tonnes. The collapse was particularly acute in St Vincent, where production fell by nearly 50%. Farmers then experienced a very sharp fall in generic banana prices in August – from 20.26 Eastern Caribbean dollars to 12.83 (US\$4.75). This is for all fruit which is not specially packaged on farm for individual British supermarkets. This news came just as farmers were being told to gear up to increase production.

Source: *Caribbean Media Corporation, Bridgetown, 05 and 12/08*

### **FRENCH CARIBBEAN: PRODUCERS FORM UNITED FRONT**

Banana growers' organisations and local politicians from Martinique and Guadeloupe formed the 'Front for the Defence and Promotion of Caribbean Bananas' on September 27<sup>th</sup>. The focus of this body will be to lobby on the reform of the subsidy system and to boost marketing of the French Caribbean banana in Europe. "We want to act ahead of reforms to the EU regime and to re-launch production which is not going well," stated Lucette Michaux-Chevry, Chair of the Guadeloupe Regional Council and president of the new association.

Source: *Echos des Fruits et Légumes, Paris, 29/09.*

### **CAMEROON: EXPANSION JEOPARDISED BY LOW PRICES?**

The industry in the Cameroon has been projecting an increase of exports to 300,000 tonnes a year for 2004 (from 230,000 in 2002), but this target is being undermined by lower and lower prices. Prices have fallen by an average of 10% per year for several years. Although there is a recognition of global overproduction, producers – all tied to either Dole through the Compagnie Fruitière or Del Monte through CDC – seem unwilling to admit that increasing exports may well undermine prices even further.

Source: *Le Quotidien Mutations, Yaoundé, 15/10.*

### **PHILIPPINES: NEW COOPS SCORE DOUBLE VICTORY**

Three new banana workers' cooperatives, created as part of the ongoing Agrarian Reform programme have won a significant legal victory: 350 former farmworkers from the AMS Corporation and Soriano Fruits Corporation in Mindanao, Southern Philippines, filed complaints against their former employers for failing to hand over a minimum of one hectare to each former worker and for failing to pay the 13<sup>th</sup> month wages. The Agrarian Reform law sets this as a minimum to "alleviate farmworkers from poverty". They won the case in June. There are now 16 cooperatives comprising 3600 former banana workers, grouped together in the FEDCO federation, and farming nearly 5000 hectares of Cavendish bananas.

Source: *Farmcoop Quarterly Review Vol 1 No 2, Davao City, Jun 03. See also [www.farmcoop.org](http://www.farmcoop.org)*



Credit: *Alter Trade Philippines*

### **KERALAN FARMERS CUT MIDDLEMEN**

Small-scale producers of bananas, pineapples and vegetables in the Southern Indian state of Kerala, with support from the state government, is fast eliminating the need for middlemen to sell their produce. 42,000 farmers have formed over 2,000 self-help groups. 15 to 20 of these groups come together to grade, bulk and trade their produce at 112 marketing centres. The wholesalers now visit these centres and farmers are able to negotiate much better prices. The promoter of this successful programme, Mr Vishwambharan of the Vegetable and Fruits Promotion Council of Kerala, who is keen to persuade producers to convert to organic production for greater productivity, believes that "farmer power can generate the energy required for a radically different kind of agricultural development". 'Office-less' training and extension

programmes amongst farmers are a crucial ingredient in the programme's success.

Source: *Business Line*, New Delhi, 11/08.

## **CUBAN SCIENTIST CRITICISES LACK OF CONTROL**

Luis Perez Vicente, a scientist from Cuba's Plant Health Institute, warned participants in a seminar on disease control in Ecuador that most Latin American governments are not undertaking any kind of tests of seed material imported from Asia where a new and virulent strain of Panama disease and other diseases like red sigatoka are currently proliferating. Other scientists warned that new strains and clones of diseases are making banana and plantain crops more and more vulnerable all over the world.

Source: *El Universo*, Guayaquil, 14/08.

## **UGANDA: GM INITIATIVE CAUSES CONTROVERSY**

A government-funded laboratory for banana improvement through biotechnology opened in Uganda in August. Uganda has the highest per capita consumption of bananas of any country in the world and is home to 10% of global genetic diversity. Bananas are vital to the country's food security. The lab's cell-culture facilities will allow banana seedlings to be cultivated in a disease-free environment. Although scientists argue that inserting genes from other bananas does not pose safety issues, some members of the parliament argued that "there should be no import of GM crops until we are completely sure of its effects". Another member commented: "We want the government to come up with a GM policy... My main concern is to know what I eat.". At this stage there is not talk in Uganda of working on transgenic bananas, where genes would be inserted from other species. A trial of genetically modified bananas is currently on hold in Nigeria, pending government legislation.

Sources: *Nature magazine*, London, 22/08; *New Vision*, Uganda, 25/08; [www.allafrica.com](http://www.allafrica.com), 28/08.

## **HUMAN DRUGS TO KILL BANANA VIRUS**

Researchers at the Gembloux Faculty of Agriculture and the Catholic University of Leuven in Belgium have teamed up to develop therapeutic techniques to eliminate viral diseases like Banana Streak Virus (BSV) from the world's largest collection of banana and plantain varieties. BSV has proved much harder than others to eliminate by previously known methods,

so the medical researchers have adapted techniques used in developing antiviral drugs for human diseases like Hepatitis B and HIV.

For more information, contact: Professor R.L. Swennen on [rony.swennen@agr.kuleuven.ac.be](mailto:rony.swennen@agr.kuleuven.ac.be)

## **RESIDUES COULD GO INTO ETHANOL PRODUCTION**

The oil industry in Ecuador is to study the potential for using bananas, sugarcane, maize and cassava to produce ethanol. As well as the obvious benefits in terms of pollution, it could reduce the costs of oil production.

Source: *El Expreso*, Guayaquil, 06/08

## **Issues: Consuming Countries**

### **THE EU'S RECORD YEAR**

2002 was a record year for EU-15 banana consumption, 3.2% up on 2001. Consumption per capita is nearing 11kg for the first time. Market shares by type of origin remained fairly stable with EU producers supplying 19.4%, the ACP 17.9% and dollar bananas 62.7%.

Sources: *Eurostat*, Luxembourg; *CIRAD-FLHOR*, Jul 03.

### **FAIRTRADE SALES BOOST PRODUCER BENEFITS**

Fairtrade labelled banana sales have continued to increase by an average 20% a year, reaching 35,700 tonnes in 2002. They are now sold in 14 countries. The extra producer benefits for the 14 producers' organisations involved are calculated to have been nearly \$6 million. Fairtrade organic demand continues to be higher than available supply.

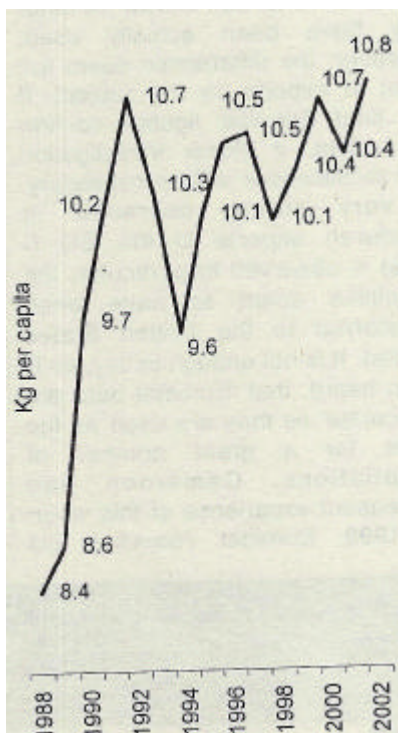
Source: *FLO annual report*, Bonn, Sep 03.

### **COMPANIES AND GOVERNMENTS AGAINST EU PESTICIDE BANS**

The EU's attempts to withdraw over 300 active chemical ingredients from the market have met with resistance from expected and less expected quarters: the manufacturers would not be expected to support such measures, even though many of the chemicals are outdated. But a warning issued following a summit between President Chirac, Prime Minister Blair and Chancellor Schroeder in early October that withdrawing all these products could damage Europe's competitiveness suggests that corporate lobbying by the big pesticide companies based in the three EU countries has been effective.

Source: *La Tribune*, Paris, 06/10

## EU consumption per capita 1988 –2002



Source: CIRAD/FLHOR, Paris, Jul 03

## CHINA: PHILIPPINES DISPLACES ECUADOR

In the last ten years the proportion of Chinese imports from Ecuador has fallen from 65% to 8%, whilst imports from the Philippines rose from just 3% to 77% over the same period. Part of this can be explained by the rapid increase in Chinese domestic production, which has risen at an average of nearly 15% per year since 1997, but the main advantage of the Philippines is its proximity. The Ecuadorian president travelled recently to China to try and reverse this trend.

Source: *El Universo*, Guayaquil, 25/09.

## IMPORTANCE OF EUREP-GAP “BLOWN OUT OF PROPORTION”

A Colombian consultant went against the grain at a recent seminar in Ecuador, by saying that EUREPGAP standards have been blown out of proportion in Latin America. The standards being required by European supermarkets have come as a bit of a shock recently to some producers and a wave of seminars have been organised to inform producers of the practical implications. Jorge Contreras of Corporación Colombia Internacional said at a seminar organised by German organic certifier BCS in Ecuador that “the supermarkets requiring this certification

account for less than 1% of the European market, and since there are no certified producers yet, they have to postpone the date when it comes into force (December 2003)”. The series of seminars was financed by the World Bank.

Sources: *El Universo*, Guayaquil, 26/07; *Diario Expreso*, 06/09.

## Special Feature Shipping: the crucial link

This article by **Richard Bright**, editor of the **Reefer Trends** weekly bulletin, gives a brief analysis of the relative importance of shipping in the logistical chain of the banana business. It focuses on the key trans-Atlantic shipping trade routes from Ecuador to Northern Europe, the lower Baltic and the Mediterranean.

Unlike the trade in any other type of fresh produce, an analysis of the global banana business requires an appreciation of the impact of the cost of logistics on banana market prices and the consequent Free on Board (FOB) returns to producers. This is because the cost of transporting a box of bananas from Central or South America to the principal markets of Northern Europe and the Mediterranean can vary from less than 30% of the delivered, Cost Insurance Freight (CIF) market price, to as much as 65% in a relatively short space of time. No other reefer cargo is exposed to the volatility of the shipping market as is the banana trade.

### Why specialist reefers?

While the majority of the deep-sea fresh produce travels either under fixed seasonal contracts in refrigerated (reefer) containers or on scheduled liner terms in conventional reefer vessels, the quickest, most convenient and cost-effective way of moving bananas is on conventional reefers. There are several reasons for this that range from the speed and flexibility of the specialist vessels to the infrastructure in the ports of origin and banana producing regions. The majority of banana ports are also too shallow to accommodate the big container ships.

Because of a combination of the shortage of cool chain facilities at key banana ports in which to consolidate full shipments, the enormous volumes of fruit in question (up to 5 million boxes

per week in the main ports of Guayaquil and Puerto Bolívar) and the unpredictability of arrival times of these volumes in the port, the reefer ships can be used as de facto cold stores, often docking two or more times to make up a full load before sailing.

With the exception of dedicated reefer container vessels carrying bananas from the Caribbean to France and the UK, the vast majority of the trans-Atlantic banana trade travels in specialist (palletised) reefers.

Ecuador is the world's largest banana exporter. In the first 6 months of 2003 Ecuador's banana exports increased by 4% to a total of 122 million boxes or 2.25 million metric tonnes (mt); the volume going to the Mediterranean rose by 19%, 4.1m boxes to 698,000 mt – 75,400 more than last year. The volume to Russia and the lower Baltic also increased by 5% to 42 million boxes or 775,000 mt (39,000 more than 2002). These markets grew in relative importance as exports to the US fell, a function of a weak US\$ and local US market prices, in some cases, at less than 50% of those of last year. While the US will remain Ecuador's most important export market, the long-term prospects for other markets such as Japan, New Zealand and China are not good as export volumes from the Philippines can compete more cheaply and China's own production continues to rise.

**Reefer industry structure**

Other than the banana multi-nationals who own their own vessels, the majority of vessels that ply the banana trades are owned or managed by 4 shipping companies: Seatrade, LauritzenCool NYK, Star Reefers and United Reefers. These companies deploy their ships on Liner Service, 12-month Time Charter agreements, Contracts of Afreightment (CoA's) or on opportunistic 'Spot' contracts. While under the first three, the logistics cost is annually or seasonally determined, rates on the spot market are completely variable. A significant percentage of ships used on the banana routes by the big four and an ever-smaller independent segment are traded spot, particularly into the important Mediterranean and the Russian markets, though the trend is beginning to change as Russian fruit importers buy their own ships. As such, customers in these

markets are vulnerable to any upward change in spot market conditions.

**THE BIG FOUR REEFER COMPANIES**

<i>Company</i>	<i>Nature of ownership</i>
Seatrade	Management in Holland, but registered in Curacao
Lauritzen Cool/ NYK	Lauritzen Cool is owned by publicly-listed conglomerate J Lauritzen, based in Copenhagen.
United	Farnham, UK
Star Reefers	Kristian Siem of Siem Industries owns 72% of Star Reefers, the rest is traded on the stock exchanges of Oslo and London. Siem Industries is a Cayman Islands-based diversified holding company;

**Box rate fluctuations**

The reason why the US\$ rate per box rises and falls so dramatically between January and May is that specialist reefers are also used for shipping cargo other than bananas. During the Southern Hemisphere deciduous and citrus export seasons, huge quantities of grapes, apples, pears and citrus are shipped from Chile, Argentina, Brazil, South Africa and New Zealand to Europe. No matter how much excess capacity the specialist reefer sector is deemed to contain, in the 4 months of the 'peak season' the balance of demand for reefer capacity outweighs that of supply.

The greater the tonnage diverted away from the relatively steady supply of banana shipments, the greater the demand for reefers on spot business becomes and the higher the box rate therefore paid. This last season, more reefer ships than usual were diverted away from the banana trade because of heavier volumes of fresh fruit from Latin America to Europe, and because more than several were stuck behind the ice in an unusually

severe St Petersburg winter. More tonnage miles were also utilised as ships sailed further to the same final destination (Moscow) via alternative Black Sea ports in order to keep the same customers supplied. As a result there was a relative shortage of supply and the Ecuador-St Petersburg box rate peaked at levels 50% above those of last year.

### **Banana market structure**

Unlike the US market where the three big multinational players control the majority of the business - each controlling their entire logistics chain from plantation to retailer - the EU, Baltic and Mediterranean markets are fragmented and reliant on third party shipping solutions. While in the more 'sophisticated' and centralised markets in the EU, demand for bananas is relatively predictable, demand in the more fragmented, developing markets is dependent on a different set of variables that may include everything from the fluidity of the socio-politico-economic environment to the solvency of the customer. While banana consumption in the EU is relatively stagnant, significant growth in demand is forecast for the Eastern Mediterranean, the Middle East and the former Eastern Bloc countries.

In this scenario if a customer has a cargo requirement over and above the vessels that have been seasonally 'fixed' on a Time Charter, this customer will go to the market via a charterer or a broker to find a ship on the spot market. By definition the 'per box' rate that is agreed for chartering the ship depends on the state of balance of supply and demand in the market at that time.

### **Of prices and profits**

In theory, the break-even landed CIF cost St Petersburg can be calculated by adding the per-box shipping rate to the minimum Ecuadorian reference price, handling 'on costs' either side and licensing costs. If the market price is recorded above the duty paid landed cost, the customer makes a profit, if lower a loss.

This year has not been good for the banana industry or market. Because of a market that did not support the high prices necessary to make a profit, customers have reportedly lost a lot of money. However banana producers in Ecuador who have shipped to the Baltic and the Mediterranean have also lost out, as the country's exporters have not been able to pay

them the minimum reference price of US\$3.20 per box. The only link in the logistics chain that has made money is the vessel owner, its charterer and/or broker, although profit here has been tempered by increased fuel costs and non US\$-denominated port costs.

### **The future: not bright....**

While the container shipping segment will continue to erode the market share held by conventional reefers in the South- North trades, specialist reefer vessels will remain the mode of choice for the banana business, at least for the short to medium term. If more tonnage is taken away from the spot market peak for specific contracts and liner business, and if reefer capacity continues to contract through scrapping, the odds are that the spot market peak will become even more pronounced. If it is given that the supply of bananas will remain constant and if market prices for bananas do not increase, the conclusion must be that the banana producer will receive less. If however Latin American banana supply is to increase then the situation could become even worse for the independent producer unless demand/consumption rises accordingly.

## ***Issues: Policies***

### **ECUADOR CLAIMS EU AND US ALREADY AGREED TARIFF LEVEL**

Ecuador's foreign trade Minister, Yvonne Baki, cited a figure of between 110 and 220 euros per tonne for the single tariff for bananas entering the EU from third countries as of 2006. She said that the EU and the US had already agreed the tariff would be in this range. Ecuadorian exporters view the change to a tariff only regime positively as it would allow them to export directly without having to go through intermediaries that hold licences as they do at present.

*Source: El Comercio, Quito, 01/08.*

### **ACP FEARS EXCLUSION FROM BIGGER EU MARKET**

When the EU regime is reformed to take account of the ten new member states in 2004, ACP exporters fear that they will not get access to the extra 75 million consumers. Although an extra 400,000 to 600,000 tonnes per year is likely to be

added to EU import quotas, ACP countries may not get a slice of this cake. In recent years, the ACP has only supplied around 5% of the consumption of the new EU members, and that only from West Africa. The Caribbean has never exported to these markets. The other fear is that the new quota will be set too high and therefore further depress internal EU prices.

Sources: *BBC Monitoring, St Lucia, 05/08; FruiTrop magazine.*

## NEGOTIATIONS FOR REGIONAL EPAs START IN AFRICA

In early October, two groupings of ACP countries in West and Central Africa were the first to open trade negotiations with the EU designed to culminate in the signing of regional Economic Partnership Agreements. The Central African Economic and Monetary Community (CEMAC), which includes Cameroon, and the Economic Community of West African States (ECOWAS), which includes Ivory Coast and Ghana, embarked on a process which may take years. Other ACP members have refused to open negotiations, already a year behind schedule, until the EU clarifies some major issues. West and Central Africa had less reservations. However, a week into talks, neither grouping could agree with the European Commission on structure and "roadmap" for negotiations. "EPAs must be instruments for development and not ends in themselves," read an ACP Secretariat statement. On the positive side, the ACP as a whole has welcomed the formal participation of "non-state actors" in these negotiations, saying that they hope that they will have a particularly important role in implementing the provisions of the Cotonou Agreement.

Sources: *European Commission, 02/10 and ACP Secretariat, Brussels, 13/10.*

## UN ROLE IN MONITORING AND VERIFICATION?

The UN Draft Norms on the Responsibilities of Transnational Corporations, endorsed in August in Geneva, call for companies to be "subject to periodic monitoring and verification by the UN". The business community is, unsurprisingly, not happy that this would go beyond the existing voluntarist approach to complying with standards. One corporate consultant in New York, however, stated that "we live in a deadline-based society. You need some threat of enforcement to get people to act". Any such norms are still a long way off, as they will have to be passed by the 53 nation UN Commission for

Human Rights, where they will be subject to intense lobbying by those opposed to any UN role in enforcement of business standards.

Source: *Financial Times, London, 13/08.*

## TRADE COULD PROMOTE LABOUR RIGHTS

"The Bush administration is quietly carrying on a major new trade negotiation with Central America that could show – contrary to the notion that globalisation hurts workers – how international trade deals can increase respect for labour rights. But the Bush team must get the right formula." Human Rights Watch labour lawyer, Carol Pier, well-known in the Latin American banana industry as the author of the report on child labour and obstacles to free trade union organisation in Ecuador, argues that the government should use the model of a textile agreement between the USA and Cambodia in negotiating CAFTA. The bilateral Cambodia deal, heralded by US Trade Representative Robert Zoellick himself as "an excellent example of the way trade agreements... promote a greater respect for workers' rights", allows the US to raise limits on imports if working conditions in that sector "substantially comply" with local labour laws and international norms.

Source: *Salt Lake Tribune/Washington Post, 03/08.*



*Banana Harvest, painting by Emilie, Martinique.*

## EU GROWERS CALL FOR QUOTA EXTENSION

Meeting in Madeira in September, the Association of European Banana Producers (APEB) has opted to press for a continuation of the current quota system for another five years, on the grounds that a single tariff regime would

lead to the collapse of European production. It was reported that French producer members of APEB were not present in Madeira, so a second meeting at the end of October in Martinique will be an important test of intra-EU solidarity.

Source: *InfoAgro, Madrid, 23/09.*

### CYPRUS ALLOCATED EU QUOTA

Cyprus, the only banana producer amongst the new EU members states which will join in 2004, has been allocated a maximum volume for which compensation payments will be available from Brussels. That volume is 13,500 tonnes per year, taking the total volume of EU bananas for which subsidy is available to 867,500 tonnes per year. This volume has never been reached however.

Source: *Official Journal, European Commission, Brussels, 23/09.*

Dependence on the EU market of the world's top 10* exporting countries (in 2002)	
1 Ecuador	20%
2 Costa Rica	43%
3 Colombia	42%
4 Philippines	0
5 Guatemala	0
6 Honduras	4%
7 Panama	76%
8 Cameroon	88%
9 Ivory Coast	96%
10 Windwards	100%
* Brazil has in fact entered the top ten in 2002. Although a final export figure is not available, about 15% of the total came into the EU.	

Source: *Banana Link calculations from FAO and EUROSTAT figures*

## Companies and Institutions

### DOLE: OFF THE HOOK IN US COURTS?

Compensation to thousands of victims of the banned chemical DBCP in Central America could well have been jeopardised for good by a simple error in the name of the company being challenged. Nicaraguan legal firm, Ojeda, Gutiérrez, Espinoza and Associates had filed the

claim against the 'Dole Food Corporation', which technically does not exist. The proper name is the 'Dole Food Company'. This case which was due to be heard in February 2004 was the only one of 80 cases filed in Nicaragua by former banana workers which had made it to the US courts. The rest were to be heard in Nicaragua, where the law allowing such cases to be heard has just been confirmed as constitutional (despite attempts to declare it unconstitutional – see *earlier Bulletins*). "This is a fatal blow; now we're dead!" said one of the leaders of the affected workers. The case was for compensation totalling \$489 million. Other cases pending in Central America are seeking a total of \$17 billion.

Source: *La Prensa, Nicaragua, 21/10.*

### NOBOA IN COURT OVER PRICE ABUSE

A producer in El Oro has initiated legal proceedings against Ecuador's biggest banana exporter, Noboa for failure to pay the legal minimum price. Noboa manager Alberto Blum stands accused of extortion, tampering with credit documents, theft and abuse of trust. The first hearing is on November 4<sup>th</sup>.

Source: *El Universo, Guayaquil, 22/10.*

### CHIQUITA SUSPENDS PURCHASES...

Citing overproduction in Colombia, Guatemala and Costa Rica, Chiquita announced at the beginning of September that it was suspending purchases from 15 suppliers in Costa Rica for ten weeks as of 14<sup>th</sup> September. The Costa Rican industry and government was incensed and called on Washington to bring its influence to bear on the company to change its mind. A spokesman for producers' group ANAPROBAN was quoted as saying that "Chiquita is showing the world its double standards and its ethical code of conduct turns out to be a front for marketing poverty." However, a couple of weeks later, apparently in view of a changed market situation, the company said it would continue to purchase from the suppliers, but at a price of only \$3 dollars a box, when the official price set by government is over \$5.

Source: *various editions of La Nación, San José, Sep 03.*

### ...AND BUYS BRITISH IMPORTER

Chiquita has bought the UK operations of family-owned Irish importer Keelings which ripens and distributes Chiquita bananas in the UK. "This transaction is part of Chiquita's ongoing strategy to focus on our core fresh produce business and

*drive better performance,”* said Cyrus Freidheim, Chiquita’s chairman and chief executive officer. Keelings had already been importing Chiquita bananas into the UK for several years. The group employs 900 people and has an annual turnover of approximately €300 million.

*Source: Chiquita Brands press release, Cincinnati, 22/10.*

## **DEL MONTE: ‘NO COMMENT’ ON GUATEMALA KILLINGS**

Following the sackings of nearly 1000 workers at Del Monte’s Guatemalan subsidiary BANDEGUA in 1999, a group of impoverished former workers decided to plant food crops on unused land belonging to the company. Soon after the occupation in late 2001, BANDEGUA sold the land – at a fraction of its market value - to a group of local ranchers (called the Bobos Cattle Company) with a reputation for being trigger-happy. In the last six months, the ranchers have shot and killed eight of the former workers turned farmers. Although locals and the government’s human rights lawyer say BANDEGUA is behind the violence, Del Monte legal counsel in Florida told the US press: *“We don’t comment on items like this.”*

*Source: Village Voice, New York, 01/10.*

## **DEL MONTE: RECORD FINANCIAL RESULTS**

Fresh Del Monte Produce announced record financial results for the first half of 2003. Net sales rose to \$1.3 billion from \$1.1 billion in the first half of 2002. Gross profit was \$216 million, but bananas did not contribute to the increase in profits; gold pineapple was the main contributor.

*Source: Business Wire, New York, 29/07.*

## **LAPANDAY POISONING CASE RUMBLES ON**

A long-running case of poisoning of land and people at Kamukhaan in the Southern Philippines was reopened when a campaigner and five journalists were arrested and charged with libel. The owner of the offending banana plantation, Luis Lorenzo Junior of the Lapanday Development Corporation (LADECO), had just become Agriculture Minister. Campaigners claim that Class Ia “extremely hazardous” chemicals banned or restricted in many countries are still used on plantations he owns and, given the fact that Lorenzo is in charge of the Fertiliser and Pesticide regulatory authority, he is accused of having a clear conflict of interest. Please contact

Banana Link if you would like to take part in the signature campaign.

*Source: KMP, Philippines, 24/09.*

## **REYBANPAC GIVES SEMINARS TO SUPPLIERS**

Favorita brand owner, Reybanpac, has been leading a series of seminars to inform its several hundred suppliers – who grow 16,000 hectares of bananas – of new environmental and social standards being demanded by European supermarkets. CEO Vicente Wong has underlined the importance of small suppliers to the company’s supply base. The programme is funded by the World Bank and seminar speakers include representatives from the Costa Rican industry and Chiquita in Ecuador.

*Source: Freshinfo, London, 21/08.*

## **FYFFES SUPPORTERS PRODUCERS IN PANAMA**

Fyffes started exporting from Panama earlier this year, which now accounts for 14% of total exports. The rest is marketed by Chiquita. Fyffes is currently supporting a group of five producers to comply with EUREPGAP standards, soon to become a requirement for European supermarket buyers.

*Source: El Panamá América, Panama City, 01/10.*

## **WALMART ORDERED TO NEGOTIATE BY US COURT**

After years of successfully keeping unions out of its stores in the USA, WalMart was ordered by a judge from the National Labor Relations Board to recognise and bargain with workers at a Texas store. The workers had joined the United Food and Commercial Workers (UFCW) three years ago and WalMart changed the meat-cutters status to ‘sales associates’, devaluing their specialised skills and bringing in ready-cut meat. Meanwhile, in Southern California, 70,000 unionised workers at nearly 900 supermarkets went out on strike when their employers started to cut costs as WalMart moved into the state.

*Sources: UFCW, Aug 03; New York Times, 15/10.*

## **AHOLD: EMPLOYEES AND SHAREHOLDERS QUEUE UP TO SUE**

The accounting scandal which hit Dutch supermarket group Ahold’s US subsidiary, US Foodservice, earlier this year is leading to a flurry of more than 20 lawsuits by shareholders and employees. The suits against the company,

which inflated its profits by \$880 million, are likely to be merged into one case in the state of Maryland.

Source: *Baltimore Business Journal*, 30/06.

## **CARREFOUR EXPANDS RAPIDLY IN EAST ASIA**

French supermarket giant Carrefour has opened 60 new stores in 2003. Nearly half of those are in South Korea and China. In South Korea, Carrefour's turnover is already over \$1.2 billion and it is set to invest a further \$800 million in the country by 2007. In 2000, the company signed an agreement on workers' rights with international trade union, UNI. It is not known how this commitment squares with its investment in China, where it is the biggest foreign chain.

Sources: *La Tribune*, Paris, 07/10; *UNI website*.

## **SAINSBURY CUTS MARGINS TO STAY IN RACE**

J Sainsbury, Britain's second supermarket chain, claims that it took a profit cut of tens of millions of pounds on banana sales in order to keep up with its rivals banana price war whilst not cutting supplier prices. Assuming this is true, Sainsbury, which prides itself on its ethical trading practice, has taken a different decision to Tesco and Asda which have cut both consumer and supplier prices to the bone in order to maintain profit margins (see *Editorial in BTNB 28*).

Source: *J Sainsbury plc*, London and *Banana Link*, 23/07.

## **DEL MONTE: PINEAPPLE PATENT RUNS OUT**

Del Monte's "Gold" variety has been coveted by its competitors for many years, but the patent has run out. It is regarded as superior in taste and juiciness and keeps fresh much longer. Numerous legal cases have been fought over this pineapple variety and until recently Del Monte had managed to maintain a highly profitable monopoly. Both Dole and Chiquita had tried to copy "Gold", and legal cases have been fought with Dole for having allegedly stolen the secret. But now, pineapples are fast replacing bananas, especially in Costa Rica... mainly planted by Dole and Chiquita or their suppliers.

Source: *Wall Street Journal Americas*, San José, 07/10.

## **INIBAP LOCATES NEW GERmplasm BANK IN ECUADOR**

INIBAP, the international research institution for bananas and plantains, and the International

Plant Genetic Resources Institute have decided to locate one of three germplasm banks in Ecuador. The bank will be set up in collaboration with the Ecuadorian Biotechnology Society, Sebioca, which has a molecular biology laboratory and its own bank of banana varieties which it has been using to produce seedlings for the local industry.

Source: *El Universo*, Guayaquil, 26/07.

## **Events, publications and websites**

### **PANAMA CONFERENCE ON CORPORATE RESPONSIBILITY**

A three-day Inter-american conference on "Corporate Social Responsibility as an Instrument of Competitiveness" was held in Panama City from 26<sup>th</sup> to 28<sup>th</sup> October, funded by the Inter-american Development Bank. Presentations included one from Vicente Wong, owner of Ecuador's second biggest banana company, Reybanpac.

For further information, contact [nelid@iadb.org](mailto:nelid@iadb.org)

### **CANARIES CONFERENCE ON ECOLOGICAL PRODUCTION**

A conference on ecological banana production was held in La Palma, Canary Islands, from 27<sup>th</sup> October to 1<sup>st</sup> November, jointly organised by a range of Canarian institutions and the Latin American region secretariat of the international trade union IUF.

Papers can be obtained from: [Antonio.bello@ccma.csic.es](mailto:Antonio.bello@ccma.csic.es)

### **COSTA RICA CONFERENCE ON EU REGIME**

Following a national seminar in August, the Costa Rican Trade Ministry and industry body CORBANA are organising a one-day conference to analyse the implications that the changes scheduled for 2006 will have on Latin American economies. "The occasion serves to profile official positions forwarded to preliminary negotiations on the matter scheduled for late next year." Several Ministers will speak and attendance is open to the public at large.

For booking information, contact: [seminariojoint@corbana.co.cr](mailto:seminariojoint@corbana.co.cr)

## **INTER-GOVERNMENTAL GROUP MEETING**

The Inter-governmental Group on Bananas and Tropical Fruits is meeting in Puerto de la Cruz, Canary Islands from 11<sup>th</sup> to 15<sup>th</sup> December. Observers from international NGOs are welcome.

Contact [pascal.liu@fao.org](mailto:pascal.liu@fao.org) for more information.

## **FAO MARKET REPORT 2003**

The annual Commodity Market Report on trends in banana production and trade was published in September and is available in English, French or Spanish on the FAO's website at [www.fao.org/es/ESC/en/20953/20987/highlight\\_28367en.html](http://www.fao.org/es/ESC/en/20953/20987/highlight_28367en.html)

## **EPAs: THE EU'S NEW TRADE BATTLEGROUND**

Traidcraft, a UK-based alternative trading organisation, has published a paper analysing the issues surrounding the negotiations between the EU and groups of African, Caribbean and Pacific countries with a view to forming Economic Partnership Agreements under the aegis of the Cotonou Agreement.

Copies available from [policy@traidcraft.co.uk](mailto:policy@traidcraft.co.uk)

## **FOOD, INC.**

The UK Food Group, a coalition of NGOs working on food, agriculture and development issues has published a report entitled "Food, Inc." on corporate concentration along the food chain from farmer to supermarket.

The report can be downloaded at [www.ukfg.org.uk](http://www.ukfg.org.uk)

## **"LO QUE HEMOS VIVIDO"**

This book (in Spanish only) brings together testimonies of Central American women banana workers, documenting the struggles to improve their working and living conditions, and for equality of wages and opportunity inside the plantations.

Available from ASEPROLA, Costa Rica via [www.aseprola.org](http://www.aseprola.org)

## **BREAKING THE PESTICIDE CHAIN**

This is a joint publication of Friends of the Earth and Pesticide Action Network UK examining the "alternatives to pesticides coming off the European union market". It is published in the context of the withdrawal of 320 active ingredients from the EU market..

Order copies via [<admin@pan-uk.org>](mailto:admin@pan-uk.org)

## **A SITE OF BANANA SITES**

The UNCTAD website contains an excellent list of other sites which are regular sources of banana information.

See [www.r0.unctad.org/infocomm/anglais/banana/sitemap.htm#links](http://www.r0.unctad.org/infocomm/anglais/banana/sitemap.htm#links)

## **www.agribusinessaccountability.org**

This is a new site hosted by Centre of Concern in Washington on issues of corporate control of the food system. A European site is under development.



Bus with banana cargo, Guatemala. Credit: Jay Kay



Credit: Sophie Paton

A "Sea Snail" from the prize-winning Banana Link mas' band at Notting Hill Carnival, August 2003.

**Banana Link website**

**<http://www.bananalink.org.uk>**

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