

Analysis of German banana value chains and impacts on small farmers & workers



BASIC

Bureau d'Analyse Sociétale pour une Information Citoyenne

Final Report
June 2014

Acknowledgement

This study has been commissioned by Oxfam Germany in 2014 as part of their EU project: European Supermarkets: Mobilizing Support for Pro-development Supply Chains.

It has been produced thanks to the help of experts and partners in Europe, Ecuador and Colombia who supported with information, materials, data and guidance.

The realization of this study has been supported by the European Commission.
The content of this study does not reflect the official opinion of the European Union.

Responsibility for the information and views expressed in this study lies entirely with the author(s).



Introduction

Several civil society campaigns have been conducted in the past decade targeting German retailers, their commercial practices and consequences on producers and workers in developing countries. In particular, Oxfam Germany published several reports since 2010 which gathered testimonies from producers and workers in Costa Rica and Ecuador in the banana, mango and vegetables sectors. In reaction, several German retailers answered that these issues were only due to specific problems with individual suppliers which they said they will investigate and remedy. They also engaged with many German NGOs on pilot projects and tried to solve the issues at stake as much as possible through (social & environmental) labels and standards. The objective of this study is to go beyond the issue of pilot projects and standards, and to investigate the German banana market and value chains from a systemic perspective, looking at its potential consequences on the living conditions of banana farmers and workers through case studies in Ecuador and Colombia, the two main origins of bananas bought by German consumers.

Abbreviations

CIF	Cost, Insurance and Freight (incoterms)
CIRAD	International Research Centre on Agriculture for Development
DEStat	German national office of statistics
EXW	Ex-Works (incoterms)
FAO	Food and Agriculture Organisation
FOB	Free on Board (incoterms)
FOT	Free on Truck (incoterms)
ISO	International Standard Organisation
USDA	United States Department of Agriculture

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1. Methodology

Perimeter and approach

The objective of the banana study is to bring together different strands of evidence (both qualitative and quantitative) to analyze the global value chains of bananas sold in Germany, their evolution since 2000, and the potential impacts on banana farmers and workers in the two main countries supplying the German market: Ecuador and Colombia.

The main areas of research were:

- The banana pricing trends in the German market since 2000
- The value chains of bananas imported in Germany from the two main origins (Ecuador & Colombia)
- The potential impacts of German value chains on farmers and workers in these countries

Limitations

The world banana market has always been heavily globalised, therefore buyers quite easily shift from one origin to another, and from one supplier to another, while keeping consistent quality bananas. In addition, exporters in banana producing countries distribute their sales and risks as much as possible between clients and consumer countries in order to maximize their gains and/or reduce their losses.

In this context, the German market only accounts for 6% to 7% of the world banana trade, and the links between pricing trends in Germany and the incomes of banana farmers and workers are indirect. However, long-term trends in global value chains can be identified and related to localised impacts on farmers and workers in banana exporting countries.

In order to analyze these global value chains, the main limitation addressed in this study is the reliability of price and cost data along the banana chain. In order to reduce uncertainties as much as possible:

- prices have been tracked from retail up to the import stage,
- costs have been estimated from the production stage down to the import stage.

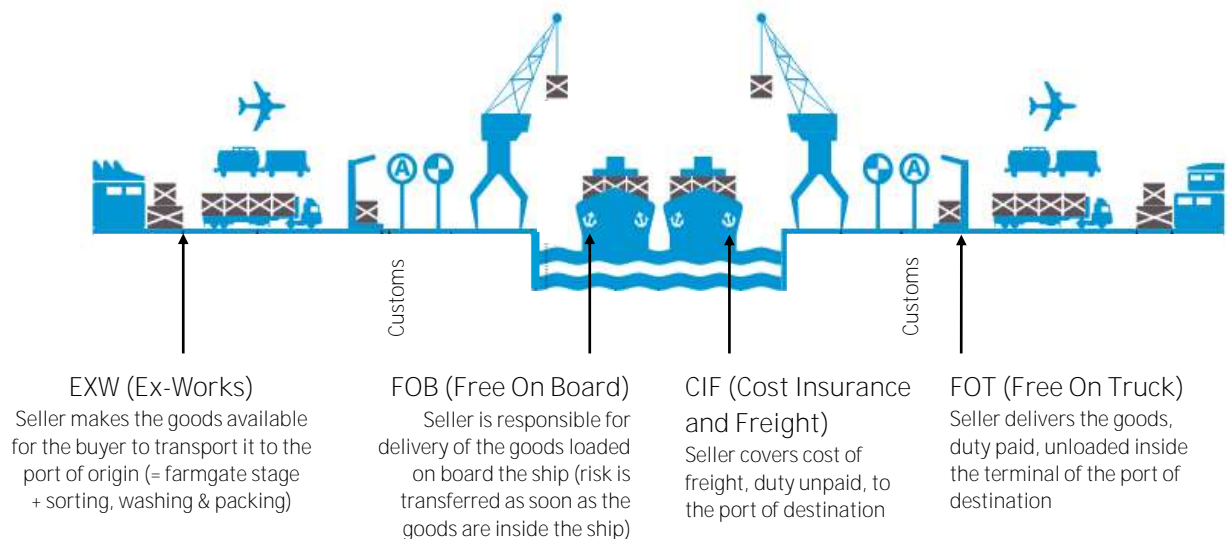
The reliability and transparency of data has been considered too low beyond these boundaries, preventing from analysing prices and costs all along the chain.

This is why the concept of unit value has been chosen to investigate the transmission of price pressure in exporting countries, in particular because of the lack of reliability of export statistics (see the section below for further details).

Incoterms¹: prices and costs along the chain

Prices and costs along the banana chains have been respectively tracked and estimated for the following incoterms stages:

¹ pre-defined commercial terms published by the International Chamber of Commerce (ICC) that are widely used in International commercial transactions and procurement processes



Unit Value of exported bananas

In order to address the lack of transparency on prices and costs along the chain, the concept of ‘unit value of bananas exported’ was used in this study to investigate the transmission of price pressure down the chain on farmers and workers.

The first reason for this approach is the greater reliability of data on flows of specific products in the databases of UN Comtrade, especially for European countries data.

Moreover, the flows of bananas transiting by third countries before entering consumer countries cannot be identified in the data of exporting countries, because the latter can only record the first port of destination of bananas, whereas Eurostat identifies re-exports among European countries.

The last reason is the existence of transfer pricing in banana trade, whereby bananas are exported at a FOB price that is much lower than is actually realised, through an offshore subsidiary in a third country before sending it to Germany in order to escape payment of corporation taxes in the export country.

In order to offset these limitations, we have estimated the unit value of bananas exported from Ecuador and Colombia based on the import prices of bananas in Germany, using the following formulae:

$$\begin{array}{l}
 \text{Estimated Unit Value} \\
 \text{of exported bananas} \\
 \text{(FOB level)}
 \end{array}
 =
 \frac{\text{CIF Value of imported} \\
 \text{bananas (Comtrade...)}}{\text{Volume of imported} \\
 \text{bananas (Comtrade...)}}
 -
 \begin{array}{l}
 \text{Estimated Unit costs} \\
 \text{between FOB and CIF} \\
 \text{(shipping, insurance, margins...)}
 \end{array}$$

The unit value of bananas exported represents the money left in Ecuador and Colombia once all costs of insurance, freight and average margins of traders have been deduced from the CIF import price of bananas. Insurance and freights were estimated on the basis of the work conducted by CIRAD (and cross-checked with experts) and gross margins were taken from the annual reports of the main international banana importers (Chiquita-Fyffes, Dole and Del Monte).

Import prices

Banana Import Prices for each country have been calculated dividing the import value by the import volumes both recorded by the UN Comtrade database (used by the World Trade Organisation).

The FAO database has not been used for calculating banana import prices because it doesn't take into account re-exports among European countries (unlike the Eurostat and UN Comtrade databases).

Retail prices

Retail prices of loose bananas in consumer countries have been sourced from CIRAD (International Research Centre on Agriculture for Development) which publishes monthly statistics of retail prices of bananas in its ODEADOM report each year.

These retail prices of loose bananas have been cross-checked with the price trend calculated by the German National Office of Statistics (DEStatis).

It is one of the key components of the Consumer Price Index and the Retail Price Index, both calculated weekly by this Office (Prices are recorded weekly for a typical selection of products - referred to as the 'basket of goods' which includes loose bananas - using a large sample of shops and other outlets. Each week, price collectors record about 200 prices for each good of the basket).

Nominal prices and real prices

Real prices have been calculated by adjusting for inflation the nominal prices at the different stages of the chain (export, import and retail). Inflation rates are based on the Consumer Price Index (CPI) in each country; they have been sourced from:

- Eurostat for Germany, the UK, Italy, the EU (27) and the Euro-zone
- ECLA/CEPAL (Economic Commission for Latin America) for Ecuador and Colombia

Volume units

Volumes of bananas are expressed and measured either in tonnes, kilogrammes or standardized boxes of 40 lbs/18.14 kg (the unit for transactions between fruit companies and their retail customers).

Note: Other sizes of banana boxes are in use in producing countries (e.g. 41.5 lbs and 43 lbs in Ecuador). These were converted in standardized 40 lbs boxes for calculation purposes.

2. The German banana value chain exerts strong pressure on prices

a) The German retail food sector: low prices and quality products

Germany is by far the biggest market for food and beverages in the European Union. According to **Euromonitor International**, grocery retailing reached sales of €186.8 billion in 2012².

The key characteristics of the German market are: consolidation, market saturation, strong competition and low prices³.

In comparison with other major European retail food markets, Germans are very price-sensitive consumers who also expect high quality products. Food prices on the German market are quite low for a country that has high average income, while the increasing consumer demand for healthier and more premium products has driven growth in the German grocery sector over recent years⁴.

In this context, discounters have been a prominent feature of the German retail market since the 1980s and have expanded rapidly: in 2012, there is one discounter for every 5,231 people, within a 10-15 minute drive of every German home⁵. The country has the highest share of discounters in food retailing: 34.6% in 2012 compared to 7% on average in Europe.



Sales in Grocery Retailing by Category, billions of Euro

Source: BASIC, based on EHI data (1980-2000) and Euromonitor International data (2010-12)

The success of discounters was strongly driven by the development of private label food products focused on (low) price. After years of growth, they are being somehow limited by their ability to open new stores and their market share is stagnating, but they maintain a leading influence on the German food retail market.

Due to the fierce competition with discounters, traditional retail chains face slim margins and have strongly developed their private labels, creating whole ranges of products from low-priced to high quality premium products (in 2011, the market share of private label products was above 40%)⁶.

² Euromonitor International, Retailing in Germany, 2013

³ USDA Foreign Agricultural Services, The German Food Retail Market, 2012

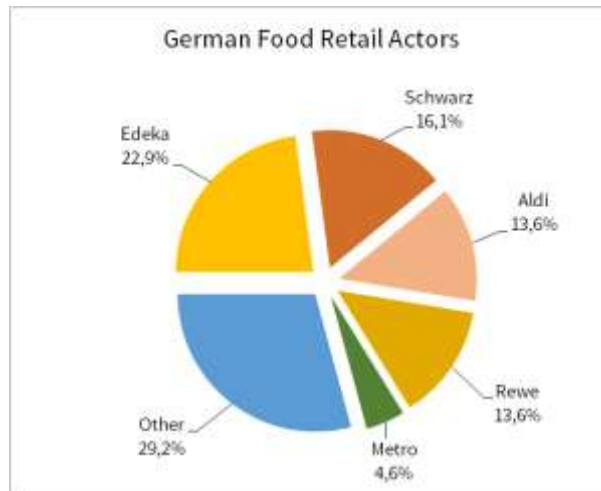
⁴ Euromonitor International, 2013, op. cit.

⁵ Euromonitor International, Fresh Food in Germany, 2012

⁶ USDA Foreign Agricultural Services, 2012, op. cit.

Today the German retail market is dominated by five major companies which, together, account for 39% of total domestic turnover. Their primary focus is on food, but some of them are among the largest clothing and non food retailers in the country.

The market share of the five leading German food retailers is illustrated below:



German food retail sector: Retailers' percentage share (2012)

Source: BASIC, based on Euromonitor International

As shown in the table below, leading German retailers have tried to position themselves on all major distribution channel types (discounter, supermarkets and hypermarkets), Aldi being a specific case focused on discounter outlet only.

Retailer Name & Outlet Type	Ownership	Food Sales (€Mil/2012)	No. of Outlets	Locations
Edeka-Group				
Edeka (Supermarkets)	local	32 710	7 717	nationwide
Netto (Discounter)	local	11 738	4 160	nationwide
Rewe-Group				
Rewe (Supermarkets)	local	16 643	2 820	nationwide
Penny (Discounter)	local	6 701	2 266	nationwide
Metro-Group				
Real (Hypermarkets)	local	6 703	331	nationwide
Metro (Cash & Carry)	local	4 315	123	nationwide
Schwarz-Group				
Lidl (Discounter)	local	13 284	3 375	nationwide
Kaufland (Hypermarkets)	local	10 800	625	nationwide
Aldi-Group				
Aldi Süd (Discounter)	local	11 829	1 810	South Germany
Aldi Nord (Discounter)	local	9 102	2 515	North Germany
Lekkerland (Wholesaler)	local	8 182	19	nationwide
Tengelmann-Group				
Kaisers (Supermarkets)	local	2 052	710	nationwide

Profiles of Leading German Retail Companies

Source: USDA based on Euromonitor and Lebensmittelzeitung

In the past 20 years, the operations and influence of German discounters has expanded strongly beyond Germany. They began to open stores in other European countries since the 1970s and 1980s. In 2007, the international operations of Aldi represent 45% of its total turnover, and Lidl generates the majority of its turnover outside Germany. The combined number of shoppers of Aldi and Lidl in the six main European retail markets outnumbers the cumulated shoppers of all other retailers across these countries⁷.

The situation of retailers in Germany is quite similar to the rest of Europe, albeit for the influence of discounters. In most other European countries too, the retail market is dominated by 4 to 6 major retailers who make up more than ¾ of sales. Even if discounters are less developed than in Germany, their growth rate is among the strongest in most countries.

As an illustration, in the UK, Tesco accounts for a little less than 30% of retail sales, ASDA and Sainsbury's around 16% to 17% and Morrisons 11%. ALDI only accounts for 4,5 % and Lidl 3.5% of retail sales, which is much below the German figures, but rapidly expanding⁸.

A different case is Italy, where the retail market was more fragmented than in other European countries until lately, lacking store chains with national coverage; but it is changing fast. There are today six major players in the Italian retail sector: Coop Italia, Conad, Interdis, Carrefour, Auchan, and SPAR. Four of the leading players - Coop Italia, Interdis, SPAR, and Conad - are consortiums of smaller operators while the other major retailers are Italian groups (Esselunga, Gruppo Pam), French groups (Carrefour, Auchan, and Leclerc), and German groups (Rewe and Lidl). Discounters account for 6% of the Italian retail market⁹.

b) The German fruit & banana markets: highly competitive and concerned about safety

Germany is the biggest European market for fresh fruits and vegetables, and the biggest European importer with annual volumes reaching 5.5 million tons of fresh produce¹⁰.

Retail chains account for more than 75% of the total sales of fresh fruits and vegetables, discount stores having the biggest market share due to their low pricing strategy¹¹.

The fruit consumption per household in Germany is in a slight decline, as in many countries in Europe.

It fell to 81.5 kg per household per year in 2010, which is slightly below the other EU countries.

As illustrated in the graph below, the main fruits consumed in Germany (including imports and domestically grown) are apples (22%), bananas (13%) and oranges (9%).

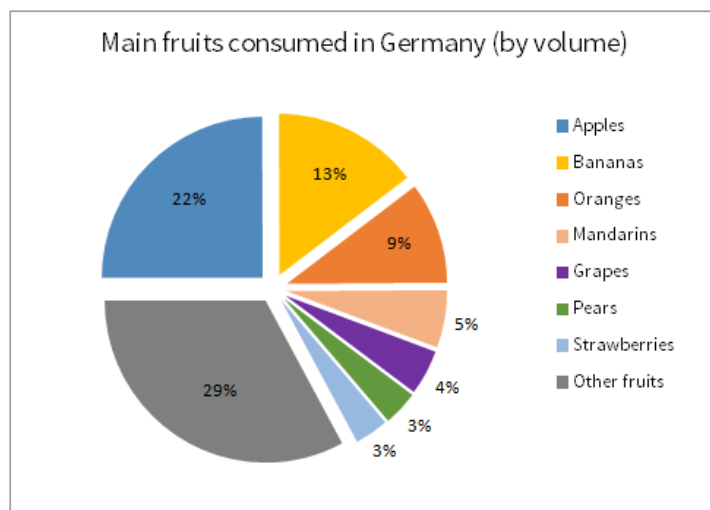
⁷ Nielsen, the Hard Discounter Report - An Overview of Aldi and Lidl in Europe, 2007

⁸ Euromonitor International

⁹ USDA Foreign Agricultural Services, The Italian Food Retail Market, 2012

¹⁰ Euromonitor International, Fresh Food in Germany, 2012, op. cit.

¹¹ Ibid.

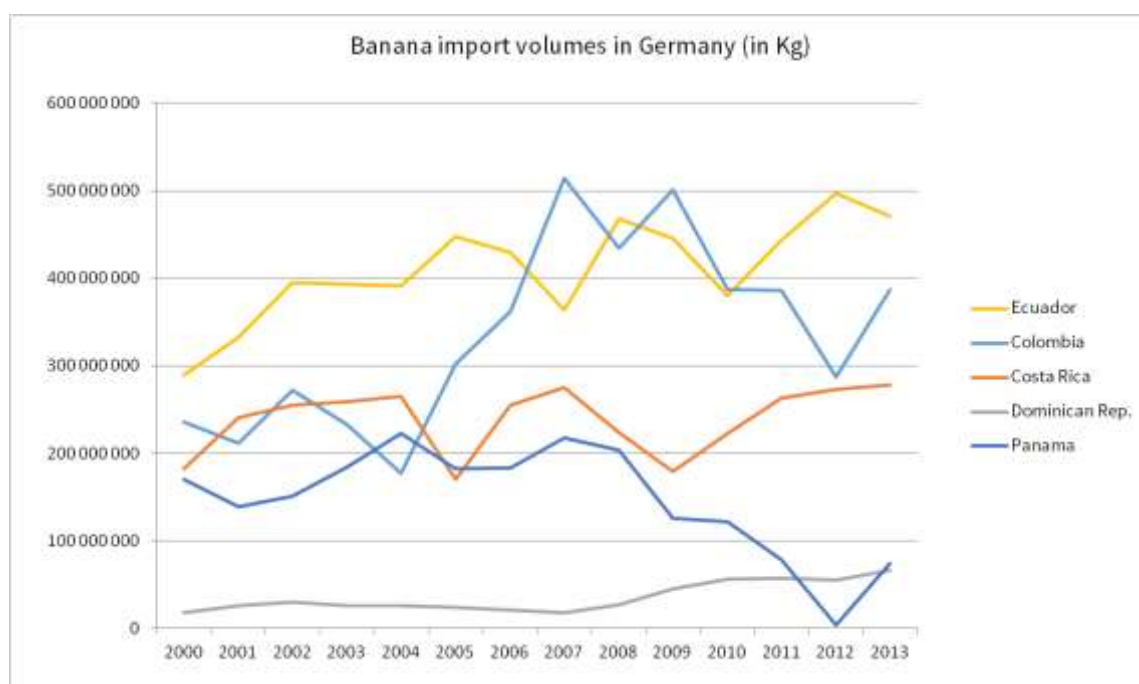


*Main fruits consumed in Germany by volume
Source: USDA GAIN Report GM7041, 2010*

A growing trend across all food retail outlets in Germany is the increase in the varieties of fruits available year-round rather than just in their traditional growing season¹².

Apple is the only fruit consumed in big volumes that is produced in the country while the rest is being imported, banana being the main fruit imported, accounting for 23% of German fruit imports in 2010.

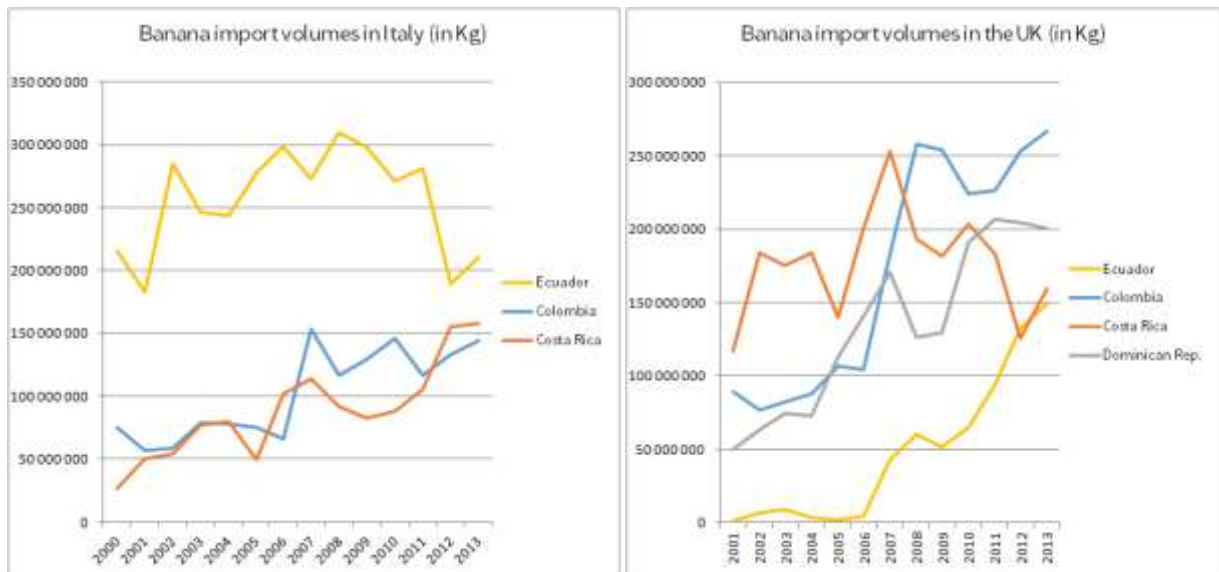
The 3 main origins of bananas imported in Germany over the past decade are Ecuador, Colombia and Costa Rica (see graph below). While Colombia and Ecuador have increased their volumes and market penetration, Panama has decreased sharply and Dominican Republic has consolidated its market share, mainly thanks to the demand for organic banana.



*Banana volumes imported in Germany
Source: BASIC based on Comtrade data*

¹² Euromonitor International, Fresh Food in Germany, 2012, op. cit.

The two other main banana consumer countries in Europe, UK and Italy, are importing the majority of their bananas from the 3 main origins (see below). Whereas in Italy, Ecuador is the main supplier of bananas and Colombia often serves as a buffer volume, the situation is reverse in the UK. By comparison, the situation in France and Spain is quite different because of the big quantities of bananas produced in their own territories (Guadeloupe/Martinique for France, Canary Islands for Spain)



*Banana volumes imported in Italy and the United Kingdom
Source: BASIC based on Comtrade data*

As for the majority of grocery products, the German fruit market is very competitive on price. Banana prices to consumers have a significantly low level in Germany compared to other European markets: once adjusted for inflation, banana prices in German supermarket chains are on average 30% lower than in France or Italy, and prices in German discounters are a further 15% cheaper than in the rest of German supermarket chains (see graph below).

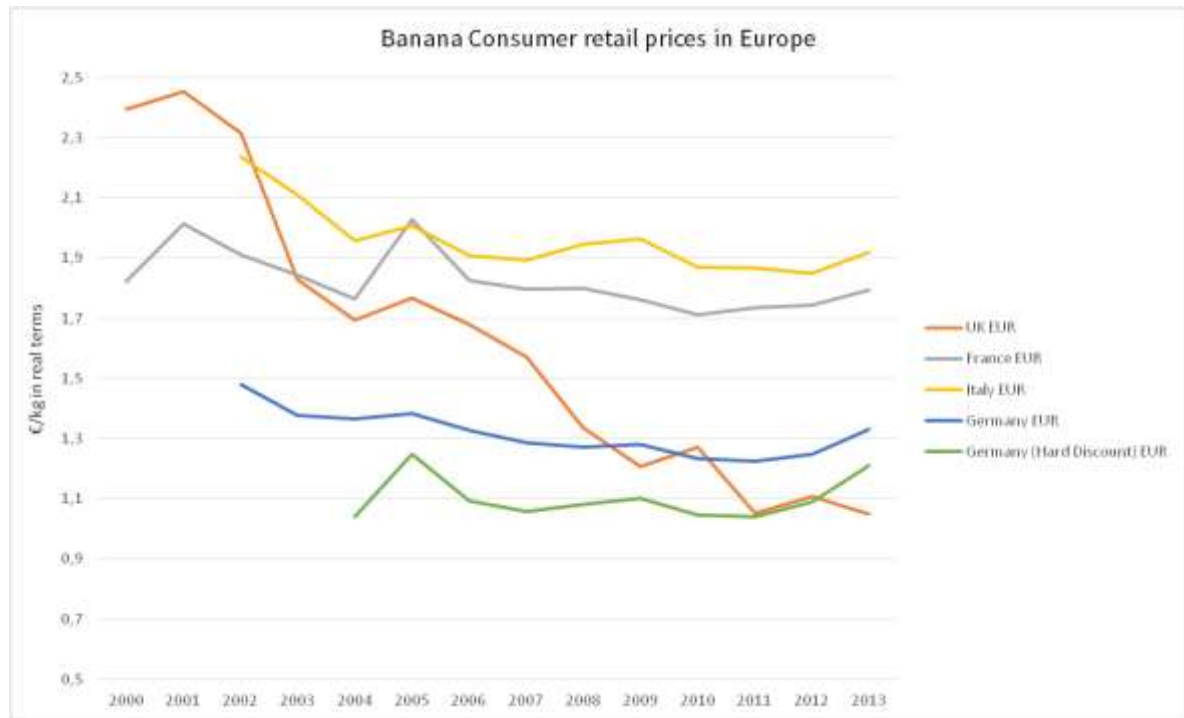
Over the past decade, consumer prices have globally stagnated in real terms in Germany, similarly to many other European markets, with the notable exception of the UK market where banana retail prices have fallen sharply because of the price wars between retailers¹³.

A slight increase in consumer prices can be seen since 2011 in most European countries (except the UK) because of the slight growth in consumption, and, before all, because retailers have passed on to the consumers the increase in energy and transport costs (and even intensified it)¹⁴.

Globally speaking, the German banana market is strongly influenced by big domestic and global retailers, so as in the rest of Europe and North America.

¹³ Since 2000, UK banana prices to consumers have plunged from well above French and Italian prices to the level of German discounters

¹⁴ FruiTrop, Banana Prices in 2013, January 2014



Consumer price of banana in EU major markets (inflation-adjusted)

Source: BASIC based on CIRAD data

German retailers place a great emphasis on the product’s cosmetic appearance rather than its overall taste, and the country of origin of the fruit (Ecuador, Colombia...) is one of the most important factors influencing consumption¹⁵. But most of all, stringent safety requirements are the main characteristic of the German fresh fruit market in general, and the banana market in particular.

German retail chains are extremely concerned regarding the safety of the fresh fruits they sell, banana in particular. In addition to the HACCP¹⁶ preventive approach imposed by European legislation, most German retailers require products to have much lower MRLs (Maximum Residue Limits) of pesticides than the legally permitted MRL in the EU, sometimes being as low as 30% of the EU norms¹⁷.

GlobalGAP certification, which has been developed and is managed by leading European retailers, is also a critical issue in the German fruit market¹⁸; producers who are not GlobalGAP certified have no chance to enter the market in a significant way, apart from small independent shops and green market traders (similar situation as in the UK and most northern European countries)¹⁹.

Moreover, several other industry certifications are very often required by German retailers, the main ones being IFS²⁰, BRC²¹ and QS²².

¹⁵ USAID - ACED Project, End market study for fresh and dried fruits in Germany, 2012

¹⁶ Hazard analysis and critical control points is the food safety management system imposed by US and European legislation on all participants of the fresh fruit chain

¹⁷USAID - ACED Project, 2012, op. cit.: “If the MRL’s are lower than the EU permitted level but higher than the chain’s own standards, retail chains often impose a penalty that the supplier has to pay and can exclude them from their list of suppliers for that product for up to several months.”

¹⁸ GlobalGAP is a voluntary standard primarily designed to reassure consumers about how food is produced on the farm and is intended to minimize environmental impacts, develop responsible approaches for workers health and safety as well as animal welfare (cf. USAID, 2012, op. cit.)

¹⁹ USAID - ACED Project, 2012, op. cit.

²⁰ International Food Standard – voluntary standard developed by the German Retail Federation in 2003

²¹ British Retail Consortium – voluntary standard developed in 1998 by UK retailers to evaluate the suppliers of their private label products, which has since become widespread in EU countries and North America

²² Quality Assurance - voluntary standard for fresh foodstuff that involves all value chain participants from farm to shop

Retail chains being the biggest distribution channel for fresh fruits in Germany, all importers and distributors dealing with them impose the same safety and certification requirements on their suppliers: these requirements are in essence mandatory for the whole sector.

c) The German Banana value chain

In order to ensure long-term availability, German food retailers purchase most of their bananas via large transnational fruit companies acting as importers (i.e. Chiquita-Fyffes, Dole, Del Monte and their partners or subsidiaries in Germany such as Atlanta, Kempowski and Saba) and big German importers such as Cobana or OGL.

There is very few direct sourcing of German retailers with banana exporters or producers, although some cases of long-term direct supply programs with producers exist.

The banana weekly spot market in Germany is very limited (less than 5% of volumes) and most banana supply (90%) is done under fixed contracts of three months to one year duration. In the past, discounters used to buy bananas from one week to another (see boxed text on Aldi in this section), but they are now also buying on 1-3 months term contracts (up to one year for Lidl)²³.

Indeed, Germany is a good illustration of the global banana trade which has been dominated by five large companies since decades: Dole (formerly the Standard Fruit Company), Chiquita (formerly the United Fruit Company), Del Monte, Fyffes and Noboa which exercised strong market power over all other actors in the chain²⁴.

However, the influence of these fruit companies has been significantly reduced over the past twenty years, as shown by the fall of their share of the world banana market (from 81% in 1992 down to 64% in 2009 according to FAOStat and companies' public information). The rest of the market is now increasingly supplied by retailers that organise direct sourcing with banana exporters and sometimes producers (plantations).

This can be explained by the conjunction of several mutually reinforcing factors:

- The consolidation and concentration of retailers in grocery markets
- The creation of quality standards by supermarkets
- The rapid development of competitive container lines
- The harmonisation and liberalisation of the EU market

The banana value chain, although structured by a small number of key actors, namely large fruit companies and big retailers, is quite complex on the ground.

Whatever the country of consumption (Germany, UK, Italy...), there are 2 main patterns of production:

- Approx. 40% of world banana production is grown on plantations owned by large fruit companies who also organize the export and import of the fruit in consumer countries.
- The rest of bananas is grown by independent producers (80% plantations and 20% small holders, some organized in cooperatives others selling to intermediaries), then sold either directly to large fruit companies, or through local independent exporters.

Once imported, bananas have to be ripened before being distributed and sold to consumers.

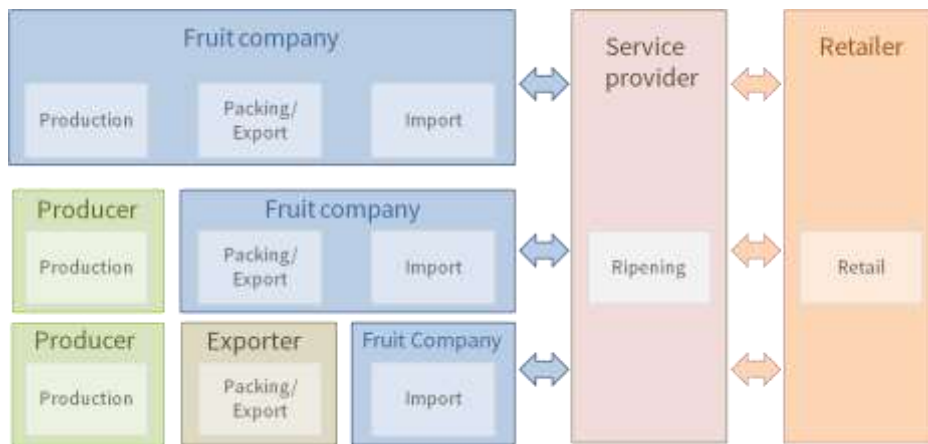
In Germany, ripening is mostly done by pure service providers that are either subcontracted by retailers, or by importers (often through subsidiaries)²⁵.

²³ Interview with CIRAD experts and German retailers (anonymous contribution of banana buyers)

²⁴ FAO, The world banana economy, 2003

²⁵ European Commission Decision of 15 X 2008 relating to a proceeding under Article 81 of the EC Treaty Case COMP/39188 - Bananas

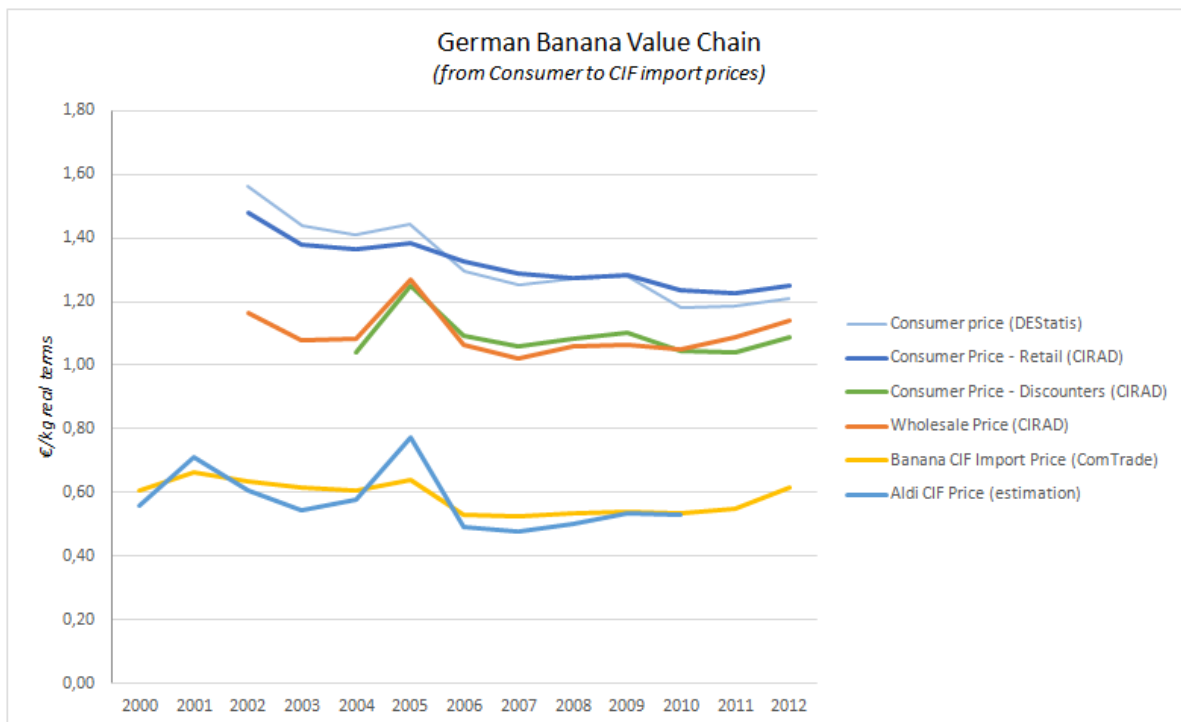
By contrast green markets, individual shops and HoReCa (Hotels, Restaurants and Cafes) are mostly supplied by average size wholesalers located all throughout Germany, who account for less than 20% of the bananas sold to consumers²⁶. In this case, wholesalers often take care of the ripening of bananas. The following diagram illustrates the main banana value chain settings of German retailers:



Main patterns of German banana chains
Source: BASIC

The German supply chain settings described above are quite widespread in European countries (Italy...). In contrast, 50% of bananas sold in the UK are sourced directly by retailers who bypass importers and coordinate directly with exporters and producers (plantations) in producing countries.

We have investigated the breakdown of the banana value chain in Germany from consumer prices to CIF import prices, based on information from CIRAD, the German National Office of Statistics, Sopisco News and the UN Comtrade database. The evolution of the value chain in real terms is illustrated in the diagram below (only Aldi published a weekly price until 2011 allowing for estimations, most other German retailers used this price as a reference over this period – see next page for further details)..



The German Banana Value Chain – from consumer prices to CIF import prices
Source: BASIC based on CIRAD, DEStatis, Sopisco and UN Comtrade data

²⁶ USAID - ACED Project, 2012, op. cit.

There is a clear tendency of price stagnation and deflation in real terms over the period 2000 to 2012. The only exception happened in 2005, creating a short-term “spike”, because of the end of the banana quota system in Europe which triggered a brief price increase which soon reversed and returned to the longer-term trend.

The banana price offered by discounters to consumers seems to be very close to the average wholesale price paid by retailers to banana suppliers.

The resulting CIF import price of bananas in Germany is being under strong pressure because of the low level of consumer prices, especially in discounters. Even though some small increase have been recorded since 2011, the CIF price hasn't keep up with the costs of production, shipping and living costs in banana producing countries (see details in section 5) .

More specifically, Aldi being one of the largest European banana purchasers, its auctions mechanism played a central role from 2002 onwards in the setting of the banana import price in Germany, and more globally in the rest of Europe (see the boxed text below).

In July 2011, Aldi ended this mechanism and stopped publishing its weekly price. Instead, it went to negotiate with a smaller set of suppliers on longer terms contracts (for 3 to 6 months). According to expert sources, Aldi changed its mechanism and stopped publishing prices after realizing that many of its retail competitors in Europe were using the Aldi price as a benchmark and managed to reach lower price levels with banana suppliers, especially during high season.

Based on data from CIRAD and Sopisco News, we have been able to estimate the Aldi CIF price for bananas from 2000 to 2011 and to compare it to the import CIF price calculated by the German customs and published in the UN Comtrade database (see the graph above).

The two curves are very similar (albeit for the “spike” in 2005 related to the end of the European banana quotas), which tend to show the influence of the “Aldi price” on the rest of the sector in Germany.

The ALDI Price²⁷

The European Commission launched an investigation in 2005 on a concerted practice between certain banana suppliers by which they coordinated weekly quotation prices* from January 2000 to December 2002 in Central and Northern Europe (Austria, Belgium, Denmark, Finland, Germany, Luxembourg, the Netherlands and Sweden).

In its decision published in 2008, the Commission indicates that the buying price of Aldi, one of the largest purchasers of bananas in Europe, was "*the obvious focal point for what the market clearing price** will be in any given week*".

From the second half of 2002, the Commission observed that the prices paid by German retailers and distributors for bananas (so called "actual prices" or transaction prices) has been increasingly linked to the "Aldi price" which began to be used as an indicator for banana pricing formulae in transactions, including for branded bananas.

The Commission identified that during this period quotation prices for Dole and Del Monte bananas (the latter were traded by Weichert) were virtually identical (whether fixed price formula or weekly negotiated prices).

The Commission found that key banana importers concerted in advance on quotation prices set weekly and their development (up, down or stable) in order to influence the ripeners which submitted their offers to Aldi, subsequently trying to influence the "Aldi Price" itself²⁸.

In its reply to the Statement of Objections, a Dole representative explained the functioning and the influence of the "Aldi Price" on the market:

"...the initial quotation prices, which some of the companies are voicing to the market on Thursday mornings after their pricing meetings, is a price trend - their expectation that the market might go up by 1 Euro, by 50 cents (always per box, per 18kg box) and [...] that the ripeners who are crucial for the supply of yellow bananas are giving quotes to Aldi (the largest buyer of bananas) in the morning of Thursday and the ripeners form their idea about how the market price might develop during the morning hours, sometime between 9 and 11 o'clock, then they send the faxes with their offers to Aldi and Aldi comes back some time after 1 o'clock; so what is happening very often is that the ripeners do expect the price of a box of bananas to go up by 1 Euro and Aldi is coming back and saying "Well, yes the market is getting better, we see our retail consumer off take developing positively but we don't accept 1 Euro up, we accept 36 cents up" [...]. So the importers really have a feeling for the market only, they see a market trend emerging, and they think that the price might go up by 1 Euro (that's what they are voicing to the market) but then the crucial thing is what Aldi thinks [...]."

* A quotation price is a formal statement of promise made by a potential supplier to a buyer in response to a request

** The market clearing price is the mutually agreed price actually reached between buyers and sellers

²⁷ European Commission Decision of 15 X 2008 relating to a proceeding under Article 81 of the EC Treaty Case COMP/39188 - Bananas

²⁸ On Thursday mornings each week, banana suppliers which sell to Aldi usually submitted their offers and usually by around 2 pm the "Aldi price" (paid to the chosen banana suppliers) was set according to European Commission Decision of 15 X 2008 relating to a proceeding under Article 81 of the EC Treaty Case COMP/39188 – Bananas

3. Ecuador: A vicious circle between German banana price trends and pressure on small farmers & workers

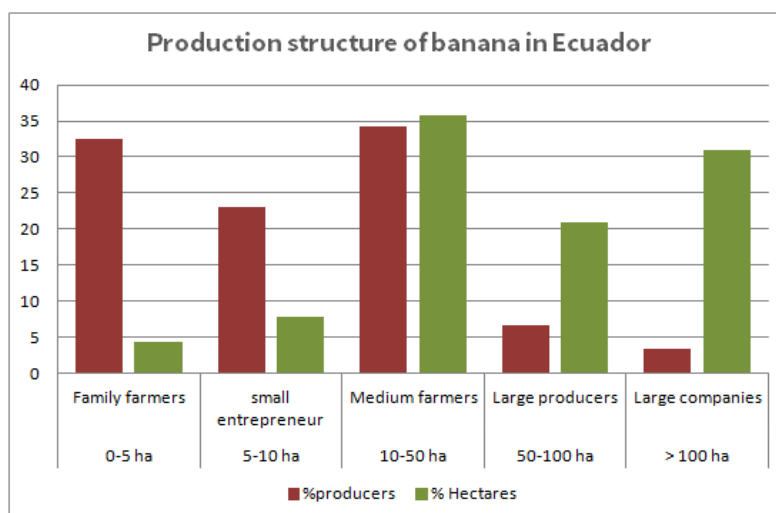
a) Ecuador strives to maintain its leading position and revenue for farmers

Ecuador is by far the world's largest exporter of bananas. It exports almost three times more bananas than the second exporter, Colombia.

The share of bananas originating from Ecuador has expanded from 18 % in the 1970s to 30 % in the 1990s to around 35 % in 2012. The main destination of Ecuadorian bananas is Europe which has bought on average 40 % to 45 % of its bananas over the past decade²⁹. Germany is the 4th biggest buyer after Russia, USA and Italy. Banana exports represent 60 % of the agricultural GDP of the country.

The 10 biggest exporting companies accounts for almost 50% of the country's total banana exports³⁰. An additional network of intermediaries trades a significant share of Ecuadorian bananas from producers to exporters (even though only farmers' associations have commercial rights since January 2011)³¹.

Production is relatively small scale compared to other Latin American countries. The latest census carried out by the Agriculture Ministry of Ecuador in 2009 showed that 90 % of the 7 334 banana producers are small and medium size farms of less than 50 hectares³². It is estimated that banana production and trade in Ecuador gives direct employment to an estimated 190 000 people.



Production structure of Ecuador's banana industry (2009)

Source: BASIC based on MAGAP cited in Ecuador to Europe value chain study for the World banana forum (2014)

Ecuador is characterized by the fact that an official minimum support price has been set by the government to guarantee a safety net to banana producers in the country.

It is based on the estimation of the average costs of a typical industrialised plantation in Ecuador (> 50 Ha), with a productivity of 1,800 boxes/ha/year.

However, the farm gate price achieved in reality by producers is significantly different from the official support price as already documented by several studies³³. The real price per kilo can vary greatly depending on the time of year (from as little as US\$ 0.05 up to US\$ 0.60) during the year³⁴.

²⁹ FAO, Ecuador to Europe value chain study for the World banana forum, 2014

³⁰ Ibid

³¹ Ibid

³² Ibid.

³³ INCAE, Analisis de la estructura salarial en la industria bananera en Ecuador, February 2012

According to the latest data available from the FAO, the average price actually received by producers in Ecuador from 2001 to 2009 varied between US\$ 0.12 and 0.16 per kilo³⁵ (compared to the Ecuadorian minimum price of US \$ 0.32 per kilo – US \$ 6.00 per box of 41.5 lbs), the rest of the value being captured by intermediaries.

Even though the official price is what is shown on invoices, various sources reported that producers are often required to return a part of the payment to the importer in return for receiving a quota for the **following week's shipment**. Exporters are also accused of various other “unfair” practices which reflect their position of power in the value chain, such as overcharging for cartons and several other services (fumigation, etc.).

Several investigations have been conducted in recent years, documenting the illegal practices on the ground that enable to circumvent the official minimum price system (see articles in appendix): absence of signed contracts, absence of payment in the Interbank Payment System, illegal planting of banana plantations (not registered in MAGAP), creation of fictitious/shell companies, proliferation of intermediaries, exporters and brands (which are quickly set up and closed down).

The interviews conducted for this study in Ecuador with producers, exporters as well as government's officials confirmed these facts. All actors agreed that this is a genuine observation of the situation in the country. They confirmed that 60% - 70% of the **banana producers'** sales are done under yearly contracts guaranteeing the minimum price (and also a maximum price) paid by intermediaries or exporters, and that the other 30% - 40% is sold at the spot market with higher prices during the high season ('temporada alta') and potentially extremely low prices of under 3 US\$/box during the low season ('temporada baja').

In this context, the Ecuadorian government has decided to strengthen its controls on the ground and to tighten the legal penalties in case of breach of the legal system.

More globally, the Ecuadorian government recognizes the difficulty to sustain and offset the fierce price competition in the global banana market through the establishment of an official minimum price.

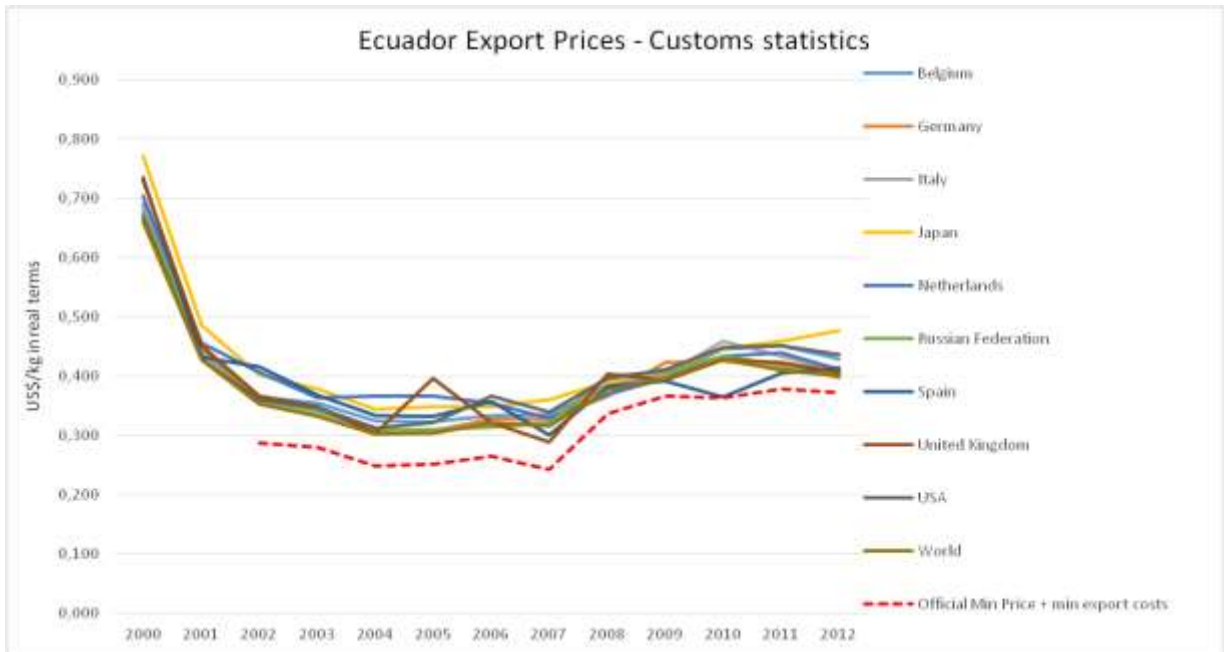
b) To what extent German price trends encourage illegal practices in Ecuador and vice-versa?

The objective of the current work is to investigate the interactions between the price-driven German banana market and the systems enabling to bypass the minimum support price in Ecuador and the difficulty for banana farmers and workers to sustain their livelihood.

Firstly, the evolution since 2000 of the unit value of bananas exported from Ecuador to the main destination countries and the official farm gate support price are shown below (based on the customs statistics:

³⁴ Sally Smith, Institute of Development Studies (IDS), 'Fairtrade Bananas: a global assessment of impact, April 2010

³⁵ FAO, Ecuador to Europe value chain study, 2013, op. cit.



Ecuador Export Prices – Customs statistics
 Source: BASIC based on UN Comtrade data

According to this data, there seem to be no infraction to the law on the minimum support price set by the government.

However, significant flows of bananas transit by third countries before entering Germany: according to CIRAD, more than 544 700 tons of bananas were imported through other European countries in 2012 representing almost 47% of total banana imports in Germany (in particular through Belgium and the Netherlands). These volumes cannot be identified in the data of the Ecuadorian customs as they only record the first port of destination, whereas the Comtrade and Eurostat databases include re-exports among European countries.

The task is further complicated by transfer pricing, whereby large fruit companies export bananas - on paper only, but at a FOB price that is considerably lower than is actually realised, through an offshore subsidiary in a Latin American, Caribbean or European third country before sending it to Germany³⁶.

We have thus modelled and estimated the amount of money that is left for Ecuadorian banana actors based on the CIF import price in Germany, deducting a conservative estimation of the shipping costs, insurance and freight between the two countries (including Panama Canal fees) and of the margins published by the major importers operating between Ecuador and Germany/Europe: Chiquita-Fyffes, Dole and Del Monte.

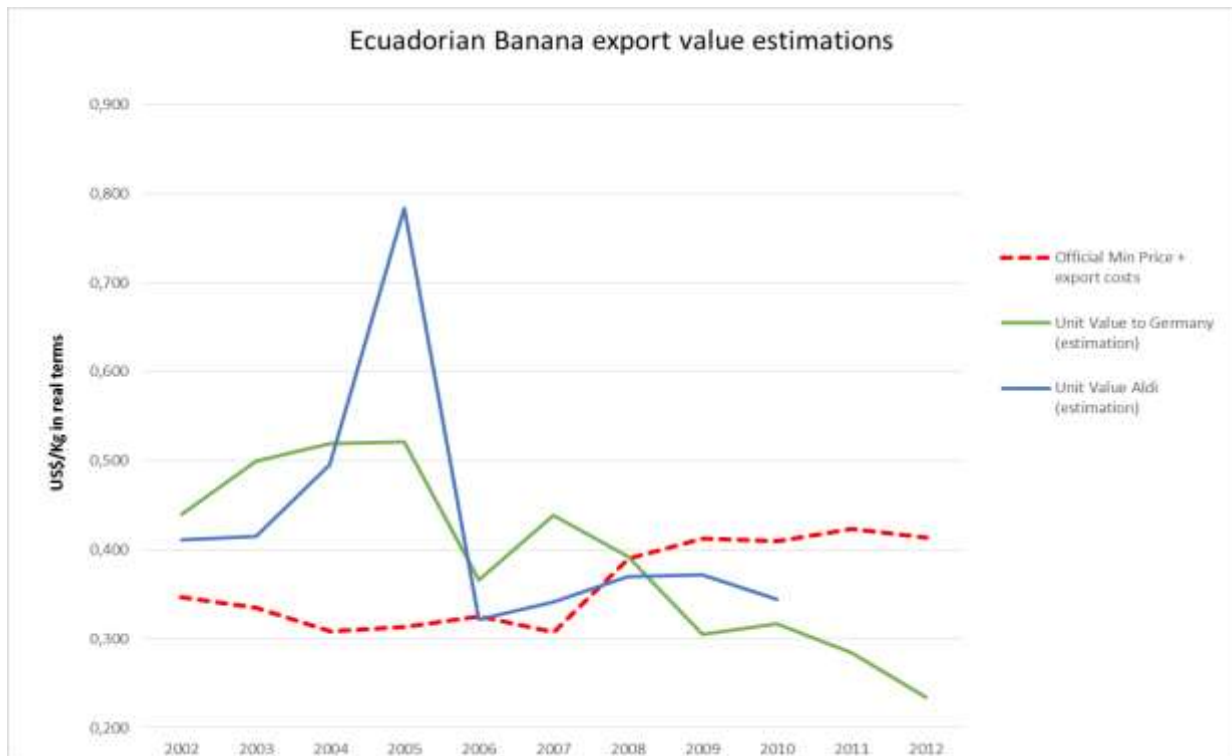
An example of estimation for the year 2010 is provided below (for further details on these calculation, see the related Excel spreadsheet)

CIF import price of bananas	-	Conservative estimation of shipping & insurance costs	-	Conservative estimation of importers/exporters margins	=	Conservative estimation of the unit value of exported bananas (FOB)
0,68 US\$	-	0,26 US\$	-	0,10 US\$	=	0,32 US\$

Calculation Model of the unit value of exported bananas
 Source : BASIC

³⁶ Common 'havens' for banana supply include Panama, Cayman Islands, Bermuda, Virgin Islands, Monaco, Jersey etc.

The global results are provided in the diagram below:

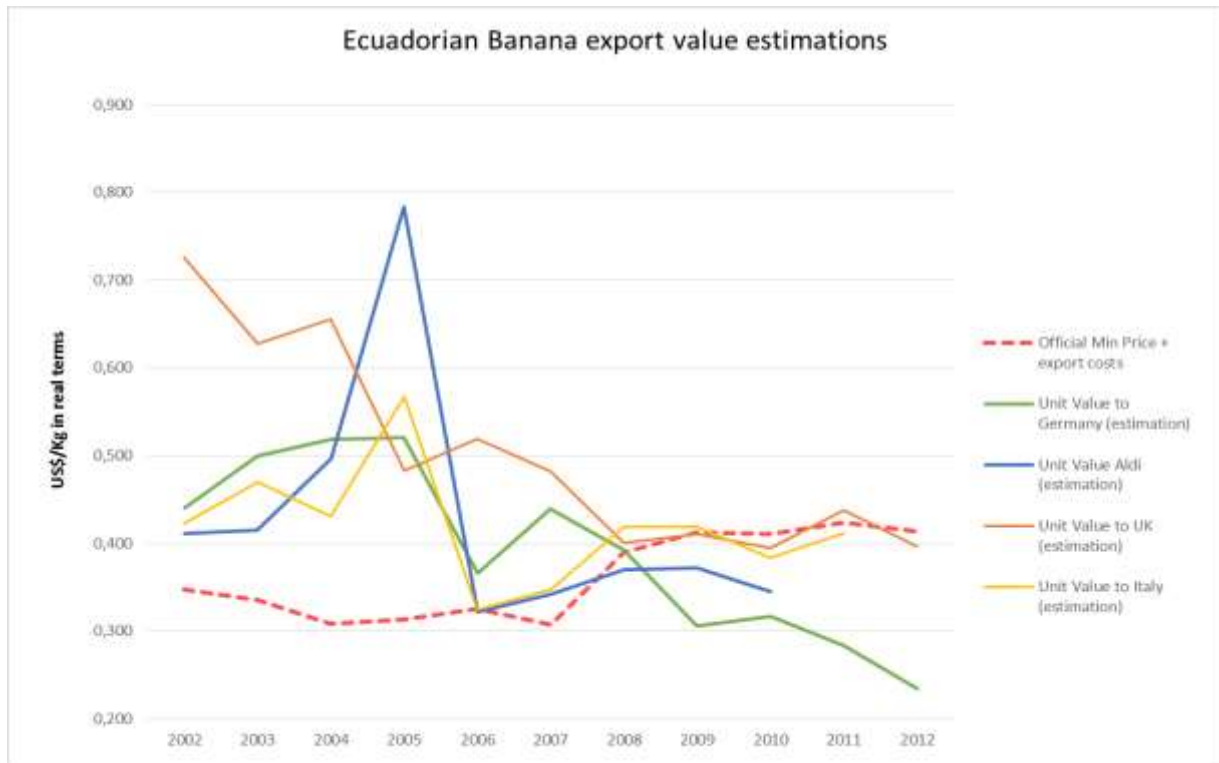


*Ecuadorian Banana export value estimations (adjusted for Ecuadorian inflation)
Source: BASIC based on Banana Link, CIRAD, Sopisco and UN Comtrade data*

The above estimations indicate that the German banana sector is potentially driving strong pressure in Ecuador with respect to the official support price since its latest increase in 2007 and 2008.

This doesn't mean that the illegal practices are directly caused by the German buyers, but that German banana price trends potentially encourage further illegal practices in Ecuador through their pressure on prices. Reversely, the existing mechanisms put in place to bypass the Ecuadorian legislation on banana support price potentially enable and encourage the low price trend on bananas in Germany.

We have also compared the price trends of German buyers to the situation in the other two major European markets for Ecuadorian bananas: UK and Italy. The results are shown in the graph below. It shows clearly that, since 2008, the price trends in UK and Italy differ from the situation in Germany: in these two countries, it seems that the actors of the value chain have revised their pricing strategy and are exerting less pressure and leaving apparently enough money in Ecuador to cover the official minimum price.



*Ecuadorian Banana export value estimations (adjusted for Ecuadorian inflation)
Source: BASIC based on Banana Link, CIRAD, Sopisco and UN Comtrade data*

We have further deepened our research work to investigate the weekly price variations for the year 2013³⁷ in order to analyze the potential impacts of weekly price changes, but also of the seasonal contracts implemented by banana exporters and importers.

We have first collected the weekly wholesale price in Germany published by CIRAD and the weekly import FOT prices in Hamburg declared by major banana brands to Sopisco.

We have then made an estimation of the unit value of bananas exported weekly from Ecuador to Germany based on the import FOT prices recorded in Hamburg, deducing conservative estimations of shipping/insurance costs and margins of exporters/importers (following the model detailed earlier).

We have also taken into account that the average duration time between harvest and FOT import is approximately 5 weeks.

An example for the 21st week of 2013 is provided below:

FOT import price of bananas	-	Conservative estimation of discharge costs and tariffs	-	Conservative estimation of shipping & insurance costs	-	Conservative estimation of importers/exporters margins	=	Conservative estimation of the unit value of exported bananas (FOB)
0,98 US\$	-	0,21 US\$	-	0,31 US\$	-	0,11 US\$	=	0,35 US\$

*Calculation Model of the unit value of bananas exported weekly from Ecuador to Germany
Source : BASIC*

On this basis, we have estimated the unit value left for Ecuadorian producers (“**ex-works**”) based on our estimations of the unit value of the bananas exported weekly from Ecuador from which we deducted a conservative estimation of the export costs in Ecuador (this costs consists in transport costs from the producer pack house to the port, port charges, custom fees and costs of documentation).

³⁷ We have checked that the year 2012 is representative of the seasonal variations of the past decade

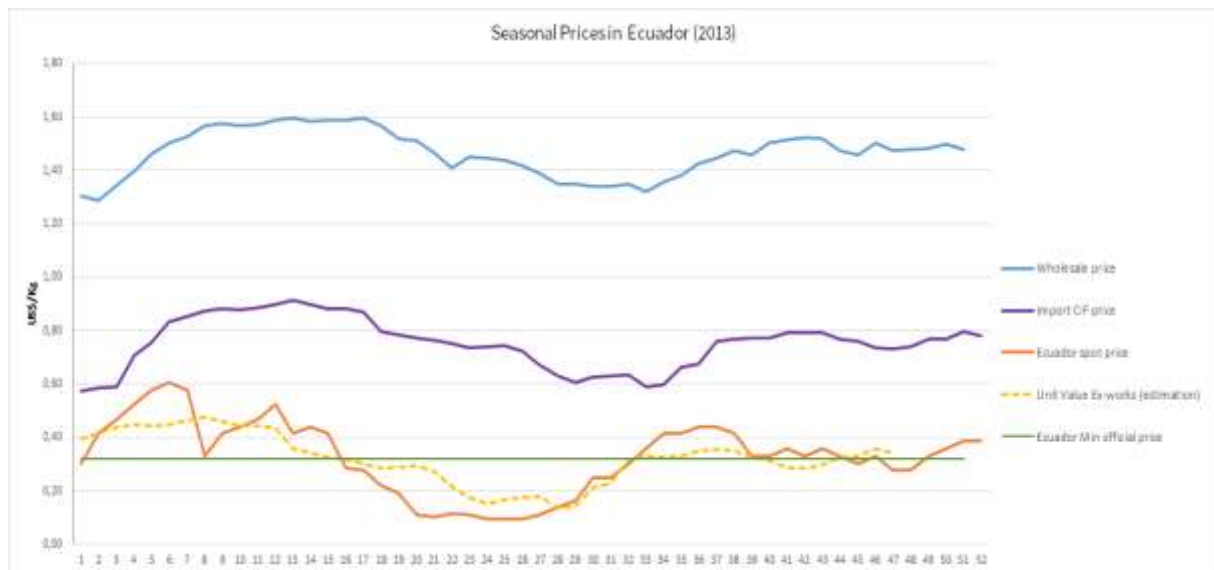
An example for the 21st week of 2013 is provided below:

Conservative estimation of the unit value of bananas exported weekly (FOB)	-	Conservative estimation of export costs	=	Conservative estimation of the unit value left for Ecuadorian farmers (EXW)
0,35 US\$	-	0,09 US\$	=	0,26 US\$

Calculation Model of the unit value left for Ecuadorian producers
Source: BASIC

Finally, we have compared these estimations with the data collected from key experts in Ecuador on the weekly spot prices of bananas on the informal market (i.e. the price paid when the official Ecuadorian minimum support price is not respected). We also took into account an average travel time of 5 weeks between sales in the informal market in Ecuador and discharge of bananas in Hamburg.

The results are provided in the graph below:



Ecuador seasonal price analysis for the year 2013
Source: BASIC based on CIRAD, Sopisco, UN Comtrade and local data

At first sight, very similar patterns can be observed between the import/wholesale prices and the spot price on the informal market in Ecuador.

The result actually sits in between the minimum official price and the spot price. It seems to be a mixed combination of both the Ecuadorian official market and the informal market.

This seasonal analysis seems to confirm the hypothesis that German banana price trends potentially encourage illegal practices in Ecuador and vice-versa.

It confirms the fact that degradation of living conditions of Ecuadorian banana farmers is nurtured by the fact that the minimum official price is not covered. In particular, the price pressure put on small farmers during the low season (which is illustrated by the very low spot market price, taking into account that there are often intermediaries between small farmers and the spot market) can have critical adverse impacts as producers strive to generate sufficient income for their families.

In terms of the workers' situation, Ecuador is the country where the unionisation rate is among the lowest of all banana exporting countries (less than 1%³⁸), but it is also the country where the minimum wage has recently increased the most thanks to government intervention.

The situation of banana workers has been recently analysed more in-depth by a team from INCAE Business School. In early 2012, the team conducted - for the World Banana Forum's permanent Working Group on the Distribution of Value along the Chain - a comprehensive survey of the wages and livelihoods of 199 families throughout Ecuador³⁹.

They studied two distinct groups of producers:

- In the small and medium size farms (smaller than 50 hectares), wages were between US\$78 per week for a part-time worker in a packing station and US\$96 per week for a permanent fieldworker
- In more industrialised plantations (greater than 50 hectares), wages ranged from US\$83 per week for a permanent worker in a packing station to US\$94 per week for a permanent fieldworker

Overall, these wages are aligned with the minimum wage in Ecuador (292 US\$ per month in 2012 and 318 US\$ in 2013), but only 25% of Ecuadorian banana workers eventually earn a 'living wage' for their families⁴⁰, i.e. enable them to purchase each month a basket of basic goods (which value was estimated at US\$ 580 per month in 2012 for a typical family of four people)⁴¹. As a result, some workers or family farmers still found themselves with income below the poverty line, fostering a spiral of negative social consequences.

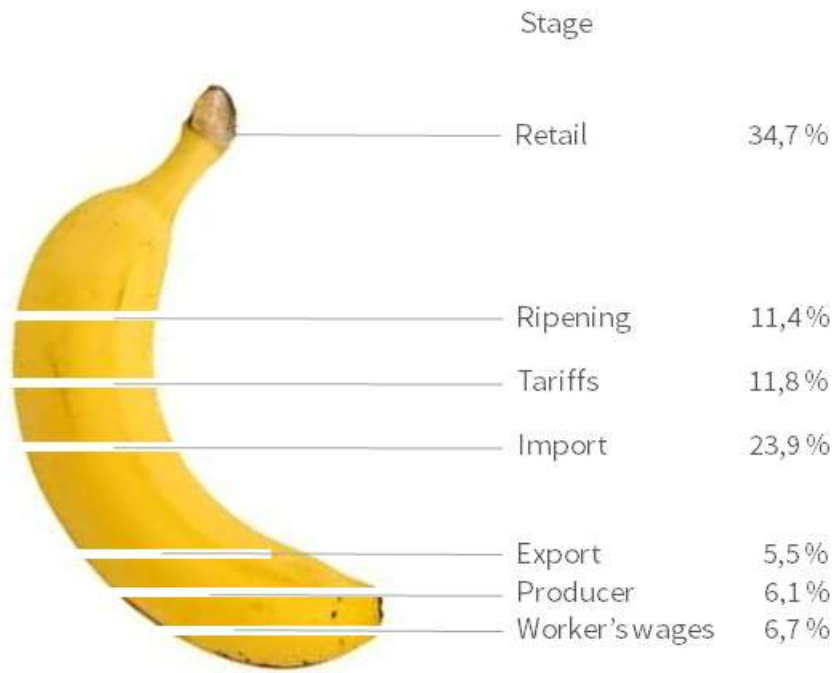
In conclusion, the following diagram shows the value breakdown along the banana chain between Ecuador and Germany, from **workers' wages up to retailers' margins**, in the case of a small entrepreneur/medium-size banana farmer (in the case of family farmers, the workers' wage component would not appear on the diagram as the work is undertaken by family members).

³⁸ Sally Smith, Institute of Development Studies (IDS), Fairtrade Bananas: a global assessment of impact, April 2010

³⁹ INCAE, Analisis de la estructura salarial en la industria bananer en Ecuador, February 2012

⁴⁰ The Ecuadorian government calculates the 'living wage' based on the median value of extended basket of basic goods and services necessary for a household to purchase (Canasta básica familiar) divided by the average number of wage-earners in a household.

⁴¹ INCAE, Analisis de la estructura salarial en la industria bananer en Ecuador, February 2012 op. Cit.



Banana value chain breakdown between Ecuador and Germany
 Source: BASIC

In this context, the price pressure exerted by the global banana market, in particular by German buyers and discounters, is most probably hampering the improvement of the situation for banana small farmers and workers, unless the government strongly intervenes through the official minimum price and increase of the minimum wage, and the control of their concrete implementation on the ground. The sustainability of the Ecuadorian banana sector seems to be at risk because living wages of farmers and workers, costs of sustainable production and externalities (such as pollution and sanitary problems related to banana production) are not covered by the price paid by the main buyers, and ultimately by retailers and consumers.

4. German banana price trends contribute to pressure workers' wages and conditions in Colombia

a) Bananas in Colombia: a highly organized sector

Bananas in Colombia are the third most important agricultural export after coffee and cut flowers. Over 90 % of the Cavendish bananas produced are exported.

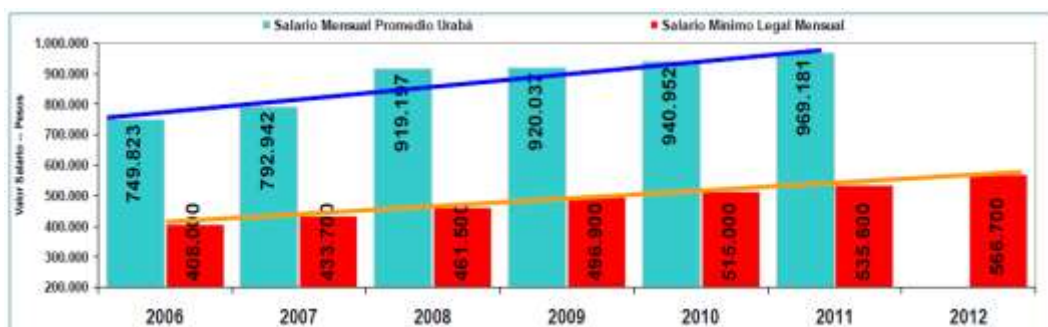
Banana occupies approximately 45 000 hectares, which is equivalent to 7 % of the total area planted to fruit crops (16% of which is for the domestic market). Production is concentrated in Uraba and Magdalena both of which are areas where conflicts has left many dead and where the current 'tense peace' between guerrilla, paramilitary and government forces remains very fragile⁴².

While production in Uraba has increased dynamically, Magdalena has tended to shrink in recent decades. This difference is related to the level of business development areas: Uraba is characterised by larger production units while Magdalena is dominated by smaller producers. As a result, Uraba contains almost 70 % of the area planted to bananas and the bulk of plantains for export⁴³.

It is estimated that banana production and trade in Colombia gives direct employment to 39 400 people and generates around 118 200 indirect jobs⁴⁴.

The banana industry in Colombia has a very particular history. As the main regions of banana production are (ex-) conflict zones, the development of the industry during the demobilisation period in the early 1990's offered significant employment opportunities to the ex-guerrilleros and their families. Their strong social identity during the civil war was the building-block for very strong trade union. Today the Sintrainagro trade union includes some 19 000 workers, representing the overwhelming majority of the permanent banana workers in the country.

The robust experience of unionisation in Uraba and cross-sectoral employee-employer negotiations have led to mature industrial relation expressed in several Collective Bargaining Agreements that have translated into better working conditions and wages than in the rest of Colombia and other countries in the region (see below)⁴⁵. The wages and conditions in some 300 farms are also better than almost all other banana exporting countries in the region: the average salary of Colombian banana workers in Uraba was US\$ 510 per month in 2011, while the national minimum wage was US\$ 282 per month for the same year (see below)⁴⁶.



Comparison between the minimum wage and the average wage in banana regions per month
Source: Augura (2013)

⁴² FAO, Value chain study in Colombia, 2012

⁴³ Ibid.

⁴⁴ Banco de la Republica de Colombia, Centro de estudios económicos regionales

⁴⁵ Augura, situación del sector bananero, 2013

⁴⁶ Ibid.

The level of wages in the Colombian banana sector is therefore quite close to the living wage, enabling many families to achieve a sustainable livelihood.

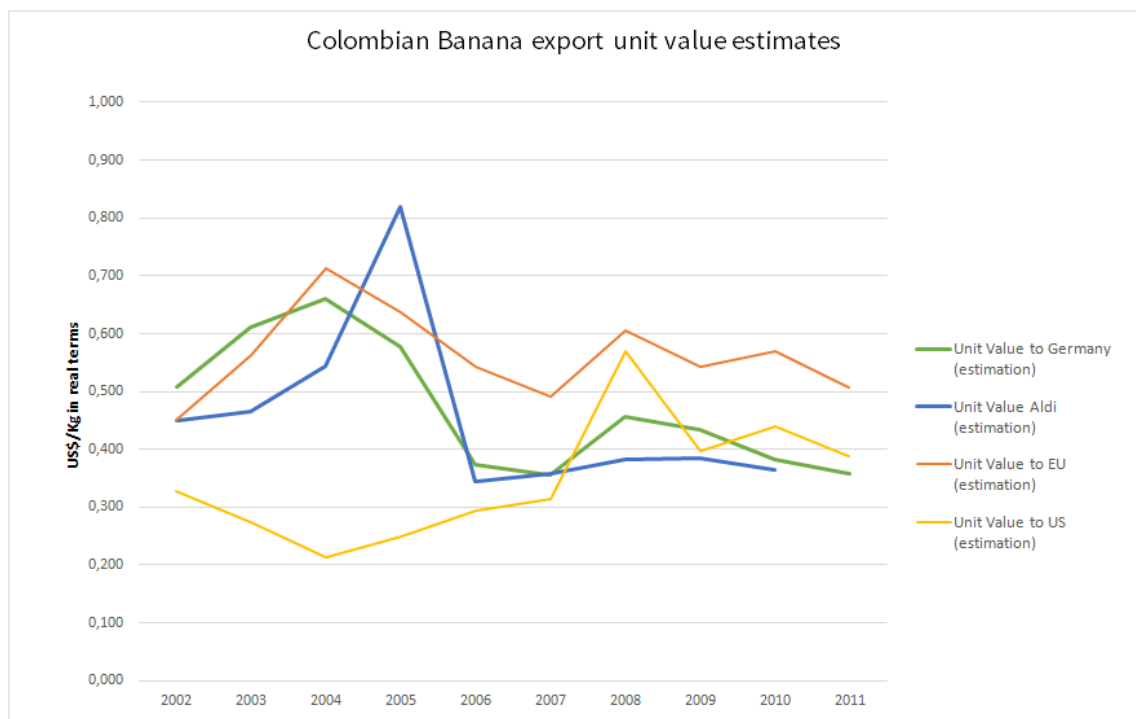
b) Strong pressure on CBA and wages because of the global banana market price levels, in particular from Germany

As for the case of Ecuador, we have made estimates of the unit export value of bananas exported from Colombia based on Comtrade, cross-checked with Sopisco data (Note: as the data available for 2012 was still under revision, we only made calculations for the period 2002 to 2011).

It corresponds to the value left in Colombia once all costs of bananas imported in consumer countries have been deduced. To achieve this, we have deduced from the CIF price of bananas imported in Germany a conservative estimation of shipping costs and gross margin of exporters & importers, and adjusted for Colombian inflation. **We have made the same with the “Aldi price” (also deducing the discharge costs and tariffs as this is a FOT price).**

As Ecuador plays the role of a buffer supplier of bananas for the UK and Italy market, we have preferred to compare the price trends of Colombian bananas sold to German buyers to aggregated EU and US figures as these two are the leading markets for Colombian bananas.

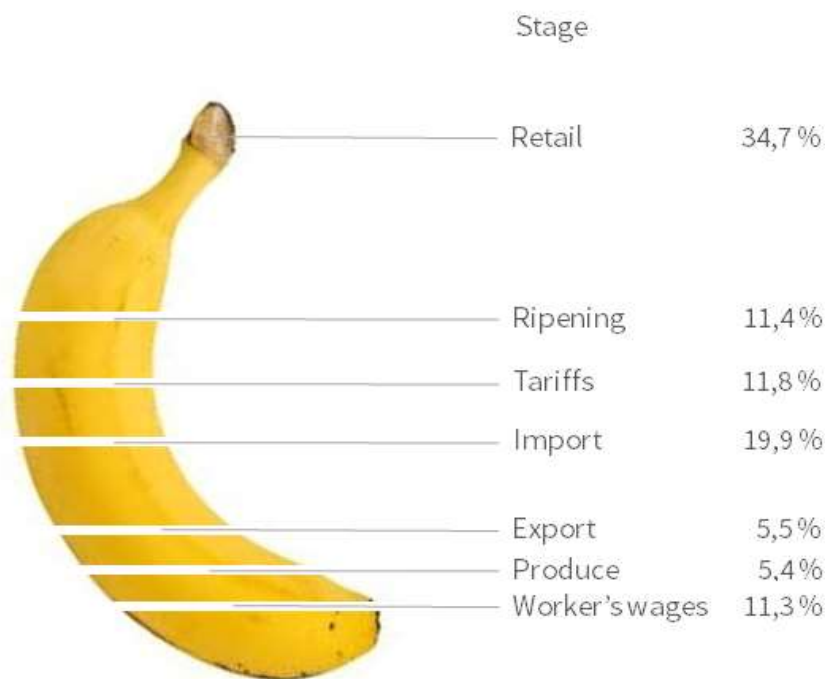
The graph below shows the results of our estimations:



*Colombian Banana export value estimations (adjusted for Colombian inflation)
Source: BASIC based on Banana Link, CIRAD, Sopisco and UN Comtrade data*

The results tend to show that while banana prices of European buyers are on a downward trend over the period 2004-2011, the trend for US buyers is the opposite (upward) for the same period. They also tend to show that prices of German buyers are lower than the average European buyers (and follow the same downward trend).

In conclusion, the following diagram shows the value breakdown along the banana chain between Colombia and Germany (from workers wages up to retailers' margins).



Banana value chain breakdown between Colombia and Germany
 Source: BASIC

Together with other factors (competition with lower cost banana exporting countries, devaluation of the peso against the dollar, turmoil in some Mediterranean consumer countries), the downward trend of German banana prices contributes to increasing pressure on Colombian workers to give up the better conditions they have obtained over the years in the name of fiercer competition between producers and producer countries to supply the retailers.

This leads to regular social tensions as shown in June 2013 when the Colombian national agricultural workers' union Sintrainagro threatened to go on strike in response to the employers' proposal to reduce wage rates and cut social benefits (see details in Appendix). As the president of Sintrainagro explained it then: « We recognise that the industry is facing a serious crisis, but it is not for the workers to pay the price of a crisis that only the companies and the government can resolve. We don't have any profit-sharing arrangements, so should not be expected to bear the brunt when exchange rates and international markets affect the industry. »

In addition, as the small and medium size producers can barely afford to remain in the banana business because of its very low profitability, land decapitalisation is taking place (see in appendix)⁴⁷ and growing conversion to oil palm cultivation can be observed in historical banana producing regions (in particular Uraba) because it requires only 1 worker per 10 hectare (as opposed to nearly 1 worker per hectare in banana)⁴⁸.

Medium-scale farms of between 20 and 50 Ha are the ones that tend currently to be converting to oil palm production in order to restore profitability to their farm⁴⁹.

In turn, this is generating growing social tensions, as there are very few alternative local job opportunities. The only 'alternatives' at present for workers in the region are oil palm, and to a lesser extent cattle & rice production, tourism or migration (mainly to the US).

⁴⁷ El Colombiano, 'Cierre de fincas por crisis bananera en Urabá', January 2013

⁴⁸ Ibid. "They have increased the planting of oil palm, a crop which is not labour-intensive. While an estate of 200 hectares of banana generates 300 jobs, an oil palm plantation only employs 25 people"

⁴⁹ Cf. interview with banana experts in Colombia (anonymous)

5. Conclusion: banana farmers & workers are caught between increasing costs & pressure on prices

The two case studies conducted on Ecuador and Colombia show the pressure on prices driven by the German banana market. To fully understand the probable consequences on banana farmers and workers, it is critical to recall the sharp increase of production costs and living costs in most banana producing countries in Latin America and Africa over the past decade.

In 2012, the Montpellier-based CIRAD (International Research Centre on Agriculture for Development) conducted a detailed study of the production and transport costs of bananas up to import stage (& their evolution since 2000)⁵⁰.

The following cost components were analysed in this study:



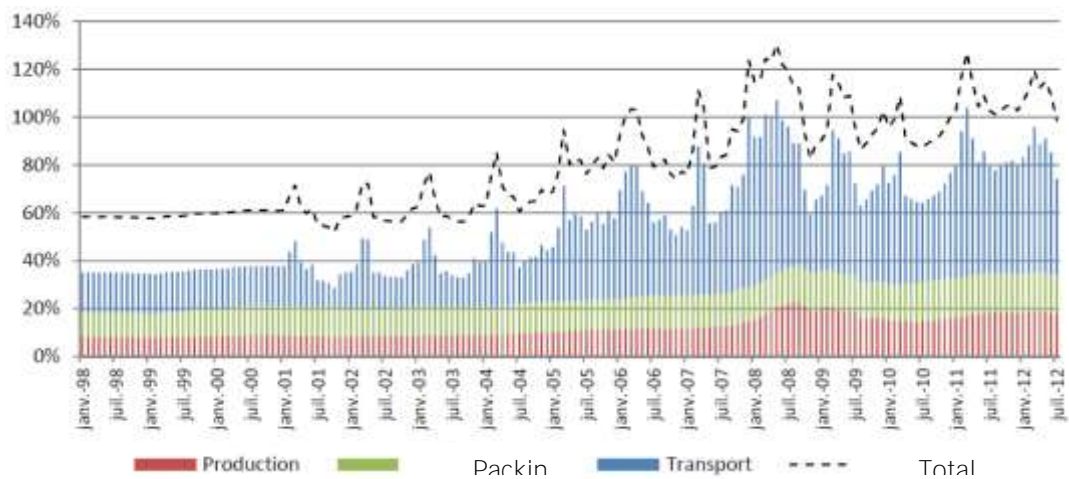
Costs components of bananas up to the import stage

Source: BASIC based on CIRAD (2012)

The results showed that:

- Costs of shipping have increased by 211%
- Costs of inputs (fertilizers and agrochemicals) have increased by 203% in the Caribbean, 126% in Ecuador & 131% in Africa
- Costs of packaging materials have increased by 61%

⁵⁰ Julia Commandeur, CIRAD, “Coûts intermédiaires de la filière banane d’importation en Europe : Répartition et évolution”, Novembre 2012



Cost breakdown of banana production & transport (origin: Ecuador)

Source: CIRAD (2012)

Globally, the CIRAD study shows that the costs of inputs (fertilisers and agrochemicals) and ocean freight follow the trends of energy / fuel prices over the period⁵¹, whereas packing material costs have been more stable (in particular cardboard).

In addition, the costs of compliance with quality, sanitary and environmental standards have also significantly increased over the past decade. This is all the more relevant with regards to the German market because of the very stringent standards demanded by food retailers in this country.

Such standards lead to more formal and complex methods for monitoring quality (e.g., risk assessment and risk management systems) and growing implementation, compliance and certification costs that are mainly incurred by producers⁵².

For example, impact studies conducted in Africa to analyse the costs and benefits of GlobalGAP⁵³ in the fresh fruit sector have estimated that:

- the initial investment costs represent between 4% of annual sales for large plantations and 11% for small farmers,
- the recurrent costs represent 1% of the annual sales of plantations, whereas they can amount to almost 20% of the annual sales of small farmers.

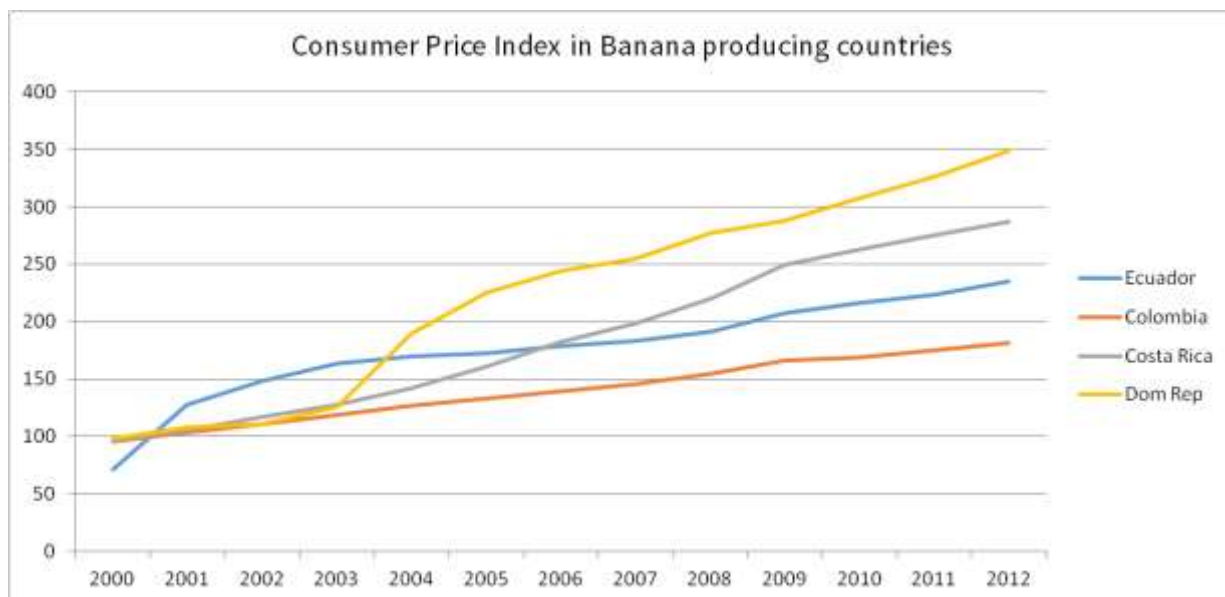
Finally, over the same period, one of the trends that impacted most banana farmers and workers is the significant increase in living costs. This phenomenon is best evidenced by the evolution of the national consumer price indices which are calculated on the basis of the costs of food, health, education, housing, transport and communication.

As shown by the official statistics from the ECLA (Economic Commission for Latin America) and the IMF (International Monetary Fund), living costs have increased by 85% in Colombia, 240% in Ecuador, 295% in Costa Rica and 350% in Dominican Republic since 2000 (see below).

⁵¹ Also demonstrated by previous studies: FAO, 2008 ; Huchet-Bourdon, 2012

⁵² Hatanaka et al., Third-party certification in the global agrifood system, 2005 ; Common Fund for Commodities, 2006

⁵³ IIED and NRI, Standard bearers: Horticultural exports and private standards in Africa, 2008



Consumer Price Index in banana exporting countries
 Source: BASIC based on ECLA (Economic Commission for Latin America)

Banana growers and workers in most producing countries are greatly impacted by this trend as they mainly live in semi-urban regions close to ports of export. They find themselves in a difficult position as they rarely grow their own food (as opposed to subsistence farmers) and bear similar costs to urban people but depend on generally lower agricultural incomes.

This global trend creates growing pressure on small farmers as the prices paid for bananas - both FOB prices and minimum prices defined by governments - have not kept pace with real increases in costs.

Based on the above analysis, it appears that the banana farmers and workers are being caught in between two strong systemic trends: the pressure on prices driven from banana consumer markets on the one hand, and the ever increasing costs of production and costs of living on the other

In the name of fiercer competition between producers and producer countries to supply retailers, they are bearing the costs of the global banana market, putting at risk the sustainability of the sector in most producing countries.

Although German retailers cannot be blamed for being the sole responsible for the situation, the study shows that they are significantly contributing to this situation (even more than several other European countries) and have an important responsibility to use their leading role in the chain to find systemic solutions to ensure the long-term sustainability of the sector.

6. Appendix: Articles and documents on illegal practices in Ecuador

La Hora - 6 de mayo de 2013

Ecuador: Bananeros piden control de precio

La Asociación de Exportadores de Banano del Ecuador (AEBE) demandó del Gobierno el ejecutar sus acciones de control para hacer respetar el precio oficial de sustentación de la caja de banano, dentro del marco de las normas legales justas.

Esto ante el anuncio de que en esta semana varias empresas exportadoras serán intervenidas, por no pagar el precio mínimo, por parte del Ministerio de Agricultura (Magap).

Eduardo Ledesma, presidente de la AEBE, a través de un comunicado, indicó que espera que ninguna de las empresas agrupadas al gremio, que son casi el 70% de las existentes a nivel nacional, formen parte del grupo que han cometido la irregularidad.

Javier Ponce, ministro de esta cartera, anunció el martes que han identificado entre cinco y siete compañías que compran la fruta sin contrato, no pagan el valor mínimo y han estado adquiriendo la caja con la modalidad de spot, las mismas que serán intervenidas por la autoridad.

De ahí que la Aebe señala que está de acuerdo con la política aplicada por el Gobierno, pero demanda una revisión del precio de la caja, porque ha caído en algunos mercados internacionales y existe una disminución en la colocación de la fruta que exige que el valor sea de 5 ó 5,40 dólares la caja, cuando el Magap la fijó en 6,50 dólares.

Baneros piden más control en el sector

El productor bananero se comunica por celular con el jefe zonal de una exportadora. Le pregunta si está comprando y cuánto paga por la caja de banano. Es martes 5 de enero y el empleado le responde que aún no se define el precio de esa semana, pero como referencia cita el de la anterior: \$ 1,50 por caja. La llamada se cierra. El productor se lamenta. Dice que aquel diálogo es tan solo una muestra de una realidad de explotación que viven los agricultores en el negocio bananero. El precio mínimo de sustentación vigente para la caja de banano en Ecuador es de \$ 5,40, pero en estos días se comercia entre \$ 1,20 y \$ 2,50.

“El negocio bananero es un caos. Todo por culpa de algunos exportadores, en complicidad con las autoridades del Magap (Ministerio de Agricultura, Ganadería, Acuicultura y Pesca), quienes son directamente responsables del laberinto en el que estamos”, dice Franklin Torres, dirigente de los productores del cantón Ventanas (Los Ríos).

Y cita algunas causas: **“Se paga por debajo del precio oficial, no se cumple con el SPI (Sistema de Pagos Interbancarios), no se compra a los productores legalizados. No se respeta nada. Es una barbarie en la que estamos”. Esa queja se multiplica en las fincas de El Oro, Guayas, Los Ríos y Cotopaxi (La Maná). Caos bananero, barbarie. No solo eso. “Es un relajó”, afirma Eduardo Ledesma, director ejecutivo de la Asociación de Exportadores de Banano del Ecuador (AEBE), quien considera que existe “una total falta de control de las autoridades”.**

Y la caja se completa. Rafael Guerrero Burgos, subsecretario en el Litoral del Magap, admite que las exportadoras están violando la Ley, pese a que en sus manos está el control.

Esta realidad se presenta en momentos en que el gobierno de Rafael Correa anuncia la creación de una exportadora bananera estatal para beneficiar a los productores pequeños y medianos. **“Su función será regular el negocio, comprará al precio oficial y obligará a pagar lo legal a las otras empresas”, afirma Guerrero, quien no obstante refiere que su operación aún tomará tiempo. Para comenzar, en estos días el Magap compra racimos de banano, a uno y dos dólares (según el tamaño), para repartir a los ganaderos de Manabí, afectados por la sequía. El régimen adquirirá hasta terminar el presupuesto de \$ 6 millones.**

Según la Ley del Banano (de 1997) y el Decreto 114 (que reforma esa Ley y fue dictado por el presidente Rafael Correa), una mesa de negociación, integrada por los exportadores, autoridades del Magap y productores, fija el precio mínimo de sustentación. Si se irrespeta ese valor, la Subsecretaría debe sancionar a los exportadores, obligándolos a cancelar el faltante al productor y una multa adicional. Asimismo, la Ley establece que los pagos deben hacerse por medio del Banco Central (SPI), como constancia.

Pero esas disposiciones se evaden y en cada finca, decenas de productores tienen su historia. La más usual y repetida es la del vuelto. Si un productor negocia 1.000 cajas de banano a \$ 1,50, por ejemplo, la exportadora le exige la entrega de un cheque posfechado por \$ 3.900. Una vez que la fruta está en el puerto, la compañía cancela los \$ 5.400 del precio mínimo, mediante el SPI, pero ha asegurado su vuelto.

Jorge Toapanta, secretario de la Asociación de Bananeros Orenses (ABO), indica que esta práctica ilegal afecta sobre todo a los pequeños y medianos productores, quienes no denuncian porque al hacerlo nadie les compraría. En esa provincia hay 3.400 productores; 2.700 son pequeños (poseen entre una y 10 hectáreas) y medianos (de 10 a 80 hectáreas). A nivel nacional son 12.452, pero solo 3.927 están legalizados, según el Magap. Son 233.427 hectáreas sembradas, unas 100 mil sin permiso.

“Los grandes tienen asegurado el negocio, pero el resto sufre el discrimin. Las compañías pagan lo que quieren. Ojalá con la empresa bananera del Gobierno se corrija”, afirma Segundo Solano, presidente de ABO.

En Corralitos, a 7 km de Machala, está la bananera de 6 hectáreas de Evelin Rodríguez. Lleva dos meses sin comercializar la producción de 250 cajas semanales. Un cupero, como se conoce a los intermediarios que sin tener bananeras poseen cupos de entrega a las exportadores, le ofreció pagar \$ 1,40 por caja. **“No resulta. Debo gastar más de \$ 2 por caja solo para cosechar y poner en el puerto”, refiere la mujer.** Cuenta que invierte casi \$ 500 por semana para mantener la finca.

Hugo Loor administra una bananera de 3 hectáreas en Ventanas. Tenía contrato con una exportadora por 300 cajas semanales, a \$ 3,80, hasta hace dos meses. Los pagos se retrasaron y ahora le ofrecen recibir a \$ 1,50. Juan Torres, de Zapotal (Los Ríos), enfrenta la misma situación en su finca de 6 hectáreas. El martes consiguió cupo pero para entregar a Chile, que se considera mercado de segunda. **“Algo es algo”, dice.**

El caos bananero interno también se da por la labor de los cuperos, quienes siguen con su actividad. El Decreto 114 de Rafael Correa lo prohíbe, pero no se controla. Solo en San Juan, Los Ríos, hay casi 20 intermediarios. Con letreros anuncian la compra de banano de primera, segunda y de rechazo. **“Ya dejamos el negocio”, dice el dueño de uno de estos locales.**

Hay productores que se quejan por la actividad de dos hermanos que se dedican a la intermediación en este sector. La esposa de uno de ellos, que pide no ser identificada, dice que, si bien están en el negocio, es poco lo que obtienen, que no es un negocio rentable, que solo ganan de \$ 0,20 a \$ 0,30 por caja.

El director ejecutivo de la AEBE exige control. “Que las autoridades del Magap les caigan a los productores a ver si están recibiendo el pago legal; que crucen las cuentas de los productores y compradores”, dice el directivo, quien también pide una depuración de exportadoras.

La AEBE tiene 17 empresas asociadas. En los dos últimos años, las exportadoras aumentaron de 30 a 154. De las 154, solo 50 exportan frecuentemente, según el directivo de AEBE.

Entrevista con Rafael Guerrero Burgos: 'Ilegalidad seguirá si no se cambia la Ley'

¿Los productores bananeros dicen que el negocio es un caos. ¿Qué información tiene usted de eso? Tenemos conocimiento verbal. Nos han dicho que algunas compañías no les están pagando el precio oficial. No han presentado, sin embargo, denuncias por escrito. Hay que tener en cuenta que, de acuerdo con la Ley del Banano, el productor debe presentar por escrito su denuncia en la Subsecretaría y hacer un reconocimiento de firma para que nosotros podamos sancionar.

¿Ustedes no pueden actuar por su cuenta?

A la mayoría de productores que les hacen eso es a los ilegales, a quienes no tienen legalizada su plantación... Hay sembradas alrededor de 100 mil hectáreas al margen de la Ley, de las 233 mil que hay en todo el país. Entonces el pequeño productor ilegal no puede vender directamente a una exportadora y debe usar un cupero u otro productor que les compren al precio que ellos imponen.

Hay productores legalizados que igual denuncian...

Puede ser que existan, pero la gran mayoría son pequeños que están en la ilegalidad y que se ven obligados a vender con ese mecanismo.

¿La ilegalidad va a seguir?

La ilegalidad va a seguir mientras no se reforme la Ley del Banano. La semana pasada, en una cita con productores e importadores, propusimos y estamos trabajando en una reforma que legalice a todos los productores que ahora están fuera de la Ley para que puedan libremente negociar. Y con eso vendrá además la empresa bananera estatal, que ayudará precisamente a regular los precios.

¿Cómo va la puesta en marcha a esa empresa?

Al mismo tiempo que se reformará la Ley, ojalá en unos seis meses, se regularizará a los bananeros ilegales y se pondrá en marcha la empresa exportadora estatal. Con la empresa podríamos llegar a acuerdos con gobiernos amigos, como el de Irán, y abriríamos mercados. Estamos en eso en este momento. Tenemos elaborado el proyecto de la empresa y calculamos que necesitamos un capital de 30 millones para laborar el primer año. Ahí habrá solución.

El Banano, un negocio lleno de auge y crisis

Los actores de la industria bananera, se han convertido en los jugadores más complicados para controlar y formalizar en los últimos doce años. A pesar de ser un negocio que sólo en exportaciones supera los 2.100 millones de dólares anuales y que genera más de un millón de empleos indirectos y directos, es el más conflictivo.

El incumplimiento de los precios oficiales, no firmar contratos, ni pagar por el Sistema de Pagos Interbancarios, siembra ilegal de plantaciones, creación de empresas fantasmas, cuperos, intermediarios y la proliferación de exportadoras y marcas son los problemas que se repiten cada año en el sector. A eso se suman los juicios que mantienen los exportadores con el Servicio de Rentas Internas (SRI) y a la baja productividad en las plantaciones.

En el negocio no solo están los agricultores sino también empresarios, industriales y hasta políticos de diversas organizaciones que ocupan cargos como alcaldes, prefectos o asambleístas que aprovechan sus influencias para recibir el precio oficial, firmar contratos y hasta mantener algunas plantaciones no registradas en el Ministerio de Agricultura de Ganadería, Acuacultura y Pesca (Magap). Eso se repite con mayor fuerza en la principal zona bananera como es la provincia de El Oro, donde la informalización y la proliferación de exportadoras intermediarias, han hecho caso omiso a la Ley de Banano y su reglamento.

Es justamente la zona orense con cerca de 50 mil hectáreas y más de 5.000 productores, donde se encuentra “el ojo del huracán”. Ahí se paga la caja entre 1,50 y hasta 3 dólares cuando el precio oficial es de 5,50. Además se han instalado más de 70 compañías comercializadoras de banano que aparecen y desaparecen en distintas épocas. En el país están registradas más de 220 compañías dedicadas a la venta de la fruta. Según los registros de la Superintendencia de Compañías existen gerentes que administran hasta cuatro y cinco exportadoras, que están relacionadas con los familiares de los alcaldes y asambleístas del Partido Social Cristiano (PSC) y del PRE, y han sido sancionadas y multadas en reiteradas ocasiones por el Magap, pero siguen en sus actividades. Por ejemplo, hasta marzo del 2012, las firmas Exbaoro, Comersur, y Exportlit estaban administradas por José Velásquez Castillo, quien también era gerente de Fruitstylelife (grupo Palacios). Las empresas exportan las mismas marcas de la fruta como Pretty Liza, Globus, MB, Tropicana, Erlenhof y otras. Es más en el 2011 la empresa Fruitstylelife fue la cuarta exportadora con 17,3 millones de cajas, superada por Ubesa, Pacific Crown Fruit, y Bananera Continental.

Pero de enero a junio del 2012 la firma no aparece, pero sí Comersur en el puesto siete con ventas de 4,8 millones de cajas. En ese periodo las exportaciones se ubicaron en 137,2 millones de cajas y las primeras en ubicarse fueron Ubesa con 14,9 millones, Tuisfruit (9,8 millones), Bagnilasa (8,2 millones), Oro banana (7,2 millones) y Ecuagreemprodex con 5,1 millones.

Las empresas que más operan en el negocio bananero orense es Banacali, Oscar Ripalda, Tecniagrex, Banacalm, Frutical, Agroprestigio, Sertecban, Silverfruit, Banatro, Fruitstylelife, Fruta Rica, Pacif Crown, Bagnilasa, entre otras. Paúl González, presidente del Centro Agrícola de Machala, sostuvo que la proliferación de comercializadoras y la falta de controles originan que la crisis bananera se agudice y que los pequeños bananeros sean explotados y hasta chantajeados para que vendan la fruta en menos de 3 dólares. “Todas las autoridades saben cuáles son las empresas que no cumplen con el precio oficial pero no las sancionan severamente. Es verdad que muchas cambian de nombre para evitar el pago de las multas y los impuestos al Servicio de Rentas Internas, pero nadie hace nada”.

Según González, más del 50% de la fruta se exporta sin contratos y no se paga por el Sistema de Pagos Interbancarios (SPI). **“Solo deben hacer cumplir la Ley y nada más, pero no lo quieren hacer”.**

En ese tema Luis Valverde, viceministro de Agricultura, sostuvo que no se exporta ninguna caja que no esté legalizada bajo contrato. **“Se sabe cuáles son los productores que tienen contratos y con qué compañías. Ya se han quedado 400 mil cajas de banano por no cumplir la Ley”.** Valverde reconoce que el tema del banano es un negocio que lleva más de 40 años, sin embargo cada cierto tiempo se presentan problemas de precios, mercado y productividad. **“En la semana 20 se exportaron 4,4 millones de cajas y revisamos en la Unidad de Banano que solo 3,3 millones se exportaban legalmente bajo contratos. Pero ahora ya se exportan 4,6 millones de cajas semanalmente y todas están registradas”.**

En menos de un año el Magap ha implementado mecanismos de control con el apoyo del SRI, Agrocalidad y del Servicio Nacional de Aduanas del Ecuador (Senae), para que toda la información sea cruzada y verificada en las exportaciones.

El viceministro de Agricultura, reconoce que es una práctica común que los exportadores tengan varias empresas para dedicarlas a su negocio y que en los registros del Magap superan las 200 empresas. Es decir, si se sancionaba a una empresa no le afectaba al exportador porque lo seguían haciendo con otra firma. **“Ahora estamos emitiendo resoluciones que se enfoquen los controles sobre las marcas y ya no sobre las compañías. Así se cambien de nombre o se crea otra empresa, ya no podrán evitar las sanciones porque se sancionará a la marca”.**

Los problemas no terminan ahí. La siembra ilegal de plantaciones es otra arista del sector. Jorge Toapanta, de la Asociación de Bananeros Orense (ABO), sostiene que en el país hay una sobreproducción, por la siembra ilegal de banano en varias zonas. **“La sobreoferta no solo daña el mercado local, sino también el internacional. Los más afectados son los pequeños productores que se quedan sin cupos o se les pagan menos de 2 dólares. Hay que controlar y eliminar las siembras ilegales”.**

Según la Secretaría de Estado, hay 207.570 hectáreas de banano en el país (aunque hay estimaciones de que la superficie sembrada es de 230.000 hectáreas pero no todas están registradas oficialmente). De esa área de siembra, 173.575 están registradas como bananeras tradicionales, mientras que 33.995 hectáreas, fueron inscritas durante el 2010, fecha en la que el Gobierno Nacional permitió a los agricultores regularizar sus plantaciones.

Carlos Emilio Veléz, subsecretario del Magap, señaló que no se realizará un censo sino un catastro bananero que comprende verificar cuáles son las plantaciones registradas y comprobarlas en cada zona. **“Todo lo que está sembrado sin autorización del Magap tendrá problemas porque está fuera de la Ley. En Santa Elena hay plantaciones que tienen permisos y otras no y van a ser sancionadas. Esperamos que los resultados del catastro estén en un mes y medio como máximo”.** Las inversiones en el área de producción bananera alcanzan un estimado de más de 4.000 millones de dólares entre plantaciones cultivadas, infraestructura, emparadoras, puertos que constituyen uno de los sectores más importante del país. Las estimaciones de la Asociación de Exportadores de Banano del Ecuador (AEBE) señalan que se debe sumar también 800 millones de dólares en industrias colaterales como cartoneras, plásticos, insumos, fumigación aérea, entre otras.

A pesar de la riqueza y generación de empleos, los problemas son múltiples y las propuestas de las soluciones van desde una veda bananera, hasta la creación de una empresa estatal comercializadora de la fruta.

Xavier Ponce, ministro de Agricultura, sostuvo que la idea de la empresa estatal es para regular la comercialización y proteger a los pequeños bananeros. “Todavía sigue en estudio la creación de la empresa ya que se deben tomar todas las precauciones”.

Mientras a los exportadores de la fruta la diversificación de los mercados y la falta de un trato preferencial de los grandes consumidores de la fruta (Estados Unidos y la Unión Europea), se convierte en un gran problema para el futuro bananero. Eduardo Ledesma, director de AEBE, sostiene que sino se firman acuerdos comerciales con EE.UU. y la UE la competencia desplazará a la fruta local y se reducirán las ventas drásticamente. “Esos mercados mantiene los precios estables y altos. Si se cambian mercados las cotizaciones serán bajas y volátiles”.

A eso se suma la discusión de los altos costos de los insumos, el incumplimiento de los precios oficiales, los bajos niveles de productividad, la creación de empresas fantasmas para exportar y hasta denuncias por evasión de impuestos que más discuten los productores, exportadores y el Gobierno Nacional.

Pese a los vaivenes, la industria bananera se consolidó en el sector externo y es hoy una de las principales fuentes de ingresos en la economía dolarizada. El banano es el primer producto de exportación del sector privado y el segundo del país, solo le gana el petróleo.

En el 2011 las exportaciones de banano registraron 2.000 millones de dólares con la venta de 280 millones de cajas. Esto representó un crecimiento del 1,7% en el número de cajas vendidas, si se compara con el 2010.

De la fruta exportada en el 2011, el 28,85% se embarcó desde las instalaciones de la Autoridad Portuaria de Puerto Bolívar (El Oro), el resto salió vía marítima por Guayaquil. Es decir, desde Puerto Bolívar se exportó 77,9 millones de cajas de la fruta, convirtiéndose así en la primera puerta de salida del banano ecuatoriano.

Las reglas ya están definidas, existe una nueva Ley del Banano y su reglamento que permite sancionar a los infractores. El pago de la fruta está regulado a través del Sistema de Pagos Interbancarios (SPI) y se aplicarán multas para las empresas que no cumplan con las transferencias. Los productores además deben tener el Registro Único de Contribuyentes (RUC), para garantizar su formalidad.

Ahí el papel de la Unidad de Banano es clave para vigilar y supervisar el negocio bananero y detectar quiénes son los que evaden los controles. La tarea no tendrá éxito si no se cuenta con el apoyo del Servicio de Rentas Internas (SRI), el Servicio Nacional de la Aduana del Ecuador (Senae) y las veedurías. Aplicar sanciones a las exportadoras también ha sido un conflicto. Fue en este Gobierno del presidente Rafael Correa que por primera vez a una empresa exportadora fue sancionada por no cumplir con la Ley.

El ex Ministro de Agricultura, Stanley Vera, multó a Fullagro y ejecutó la garantía para que se cancele a los productores afectados. También se prohibió que exporte y por eso la empresa inició un juicio en contra del Subsecretario de Agricultura del Litoral Sur, Carlos Emilio Vélez. El juicio sigue su curso legal.

Por disposición del Presidente de la República, toda fruta que se exporte debe contar con su respectivo contrato para salir del puerto a su destino final. Sin embargo, el 50% no lo cumplen y los productores por ende reciben menos de 5,50 dólares (Precio Mínimo de Sustentación) por cada caja de la fruta.

El dilema es que en temporada alta (que dura 22 semanas) todos quieren recibir 7, 10 y hasta 12 dólares. Por eso no firman contratos con toda la fruta que producen, sino que dejan una parte al mercado spot (sin contrato y se vende al que más pague). Pero el problema se genera cuando llega la temporada baja y los precios caen hasta 1,50 y 2 dólares en el mercado interno.

El Gobierno solo garantizará a los que firmaron contrato, para que reciban los 5,50 dólares por caja de 41,5 libras, según lo han ratificado las autoridades del Magap. El Presidente Rafael Correa reconoció el problema bananero y dispuso que se termine de una vez por todas, caso contrario el Gobierno saldría de las mesas de negociaciones.

En sus insistentes declaraciones, el Mandatario dijo que si las exportadoras no respetan la Ley y si hay denuncias de los productores, inmediatamente las nacionalizaría.

Imminent banana workers' strike in Colombia: the buyers' responsibility?

The Colombian national agricultural workers' union Sintrainagro has announced that its 20,000 members employed in the banana industry will come out on strike in response to the employers' proposal to reduce wage rates and cut social benefits. This follows weeks of negotiations between Sintrainagro and Augura, the industry body in Colombia's Urabá region. The start-date is being determined by a strike committee elected yesterday, following a ballot of members that supported industrial action.

More than one banana in five imported into Britain currently is grown in Colombia, and over a third of these carry the Fairtrade label.

Barring a last-minute change of position by Augura, the industry body, 288 medium- and large-scale farms in Urabá will be paralysed in the next fortnight. The flow of well over a million boxes per week, mostly to Northern Europe, will dry up within a fortnight of the start of the strike.

The union very much regrets have to have recourse to strike action, but, as Sintrainagro President explains: « We recognise that the industry is facing a serious crisis, but it is not for the workers to pay the price of a crisis that only the companies and the government can resolve. We don't have any profit-sharing arrangements, so should not be expected to bear the brunt when exchange rates and international markets affect the industry. »

Although industry spokespeople cited in the Colombian press today note that there is still a chance of finding a solution before the 17th June deadline for setting the strike date, there is a huge gap between Augura's proposal to cut the rate for some jobs by over 40% and the union's bottom-line expectation – that workers should not have to throw away 20 years of improving wages and conditions, gained at the cost of many lives.

Maybe, just maybe, the big buyers who have kept the lid on price rises – especially in the UK where Colombia has become the biggest source of banana imports – will realise that their pricing policies have an awful lot to do with the crisis in Colombia. Bananas on the cheap - especially Fairtrade bananas - are simply not sustainable.

Cierre de fincas por crisis bananera en Urabá

El Colombiano

Por FERNEY ARIAS JIMÉNEZ | Publicado el 17 de enero de 2013

Notas relacionadas

Los cultivos de coca en la Serranía de Abibe serían el destino que tendría parte de los 3.000 trabajadores bananeros, de 32 fincas, que están a punto de cerrar en Urabá.

Así lo prevé Guillermo Rivera Zapata, presidente de Sintrainagro, al dimensionar la crisis de esta actividad, que genera unos 100.000 empleos entre directos e indirectos, en la Región, y quien asegura que el año pasado unos 4.000 trabajadores quedaron cesantes. "Esos despidos no se notaron porque fueron repartidos en varias fincas, pero se vienen muchos despidos colectivos".

La inquietud del dirigente sindical es compartida por empresarios como Gabriel Harry Hinestroza, para quien el Gobierno debe tomar en serio un incremento del desempleo, que sería el caldo de cultivo del que se aprovechen los grupos armados al margen de la ley.

Otra voz de alarma la da Adolfo León Zapata Betancur, presidente del Consejo Directivo de la Cámara de Comercio de Urabá, quien sostiene que "se trata de una bomba de tiempo que podría estallar en el corto plazo".

Según cifras oficiales, Urabá es la segunda región, después del Bajo Cauca, con el mayor índice de necesidades básicas insatisfechas, cercano al 53,18 por ciento, cuando en Valle de Aburrá es de 11,51 por ciento. También ocupa el segundo lugar en miseria, en la que está sumida el 28 por ciento de su población.

Mientras el clamor por la adopción de correctivos que ayuden a la supervivencia del negocio bananero es generalizado, los planes para la redención y sostenibilidad económica en la zona agroindustrial siguen en el papel.

Opciones en estudio

El gobierno de Antioquia diseñó el Proyecto Integral Regional para el Desarrollo de Urabá, que recoge una serie de iniciativas que pudieran mover la economía con actividades diferentes a la producción, comercialización y exportación de banano.

El asesor de la Gobernación de Antioquia, Federico Restrepo Posada, reconoce los esfuerzos adelantados para diversificar los cultivos con la siembra de piña, palma de aceite, cacao, caucho, sorgo y yuca, pero explica que los resultados se verán a mediano y largo plazo.

Restrepo aboga por impulsar una vocación adicional que aproveche el mar y el asentamiento de una zona industrial, que tenga y construya sus propios puertos. En el primer semestre de este año la Promotora de Proyectos y la firma Araujo Ibarra elaborarán un estudio para definir qué sectores industriales tendrían ventajas y oportunidades estableciéndose en Urabá y las especificaciones que requeriría un futuro desarrollo portuario para el Golfo, para que lleguen allí no solo buques bananeros sino graneleros y de carga.

Sobre el potencial carbonífero en la zona, del que se habló como la redención urabaense en la gobernación de Luis Alfredo Ramos, Restrepo indica que, si bien hay afloramientos en el Norte, su aprovechamiento no es competitivo. "En principio hubo mucho entusiasmo, pero se desvaneció cuando conocimos los detalles del potencial".

Más alternativas

Para los expertos, Urabá se desarrolló sobre la economía bananera y todo lo que se hace hoy es en función de esa actividad. Aunque coinciden en que es un reglón necesario y debe preservarse, también es el momento para complementarlo con otros negocios.

La Cámara de Comercio regional sostiene que generar el cambio cultural es difícil, pero se ha intentado diversificar cultivos, aunque duda de la eficacia si el fin de esas siembras es la exportación, porque finalmente, van a estar afectadas por la revaluación como lo está el banano hoy.

Sintrainagro apoya la diversificación, pero considera que generar el nivel de empleo del sector bananero es difícil.

"Han planteado la siembra de palma de aceite y ese cultivo no es intensivo en mano obra. Mientras una finca de 200 hectáreas de banano genera 300 empleos, una de palma con esa extensión solo da trabajo a 25 personas, así que esa no es la alternativa", aclara Rivera.

Otra posibilidad sería la ganadería, que ha mejorado y ampliado el hato en los últimos tiempos, pero al igual que el cultivo de palma no genera mucho empleo. Rodrigo Alberto Mejía Arango, gerente de las Subastas Ganaderas del Urabá Grande (Suganar), dice que en la región hay unas 750.000 cabezas de ganado, principalmente de cría, que ocupan un área de 500.000 hectáreas, por lo que aconseja la siembra palma.

A eso se suma que desde la Asociación Hortifrutícola de Colombia (Asohofrucol), Álvaro Ernesto Palacio Peláez, critica la baja productividad de plátano en Urabá: "mientras una hectárea produce 7,5 toneladas en la zona, en el Eje Cafetero llega a 15 y en la Orinoquía es de 30 toneladas".

Por ahora, trabajadores, gremios y empresarios de Urabá solo esperan que la revaluación que afecta al banano no se acentúe y siga pasando factura de cobro con despidos, pues, de fondo, es el detonante de una bomba social en una región con muchas necesidades y cuyas mayores promesas de desarrollo siguen en veremos.