

## GOING BANANAS

### The global and local economics of the Australian banana industry

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#### Introduction

When Cyclone Yasi hit Far North Queensland (Qld) in 2011 we saw over 50% of the nation's banana production wiped out. Subtropical banana growers in South-Eastern Qld and Northern New South Wales (NSW), usually the poor cousin producers of their Far North Queensland counterparts suddenly found their product in huge demand.

In the weeks that followed the cost of bananas in our supermarkets skyrocketed from less than \$5 per kilo to around \$15 per kilo. Bananas shifted from being an everyday fruit option amongst the apples and oranges in the fruit bowls of the average Australian household to a luxury item that only a few could afford. One television commentator half-jokingly remarked that when invited to dinner he now gave the host a bunch of bananas instead of a bunch of flowers. There soon followed calls for Australia to start importing bananas into the country from major banana export countries like the Philippines (Eslake, 2011). Such calls were quickly shouted down by the national banana growers association.

While 93% of Australian households buy bananas weekly (Australian Banana Growers Council (ABGC), 2017), the Australian banana industry finds itself buffeted by unpredictable environmental and biosecurity challenges and complex global economic and political winds of free trade and Transnational Corporate (TNC) interests. To understand how Australia fits we must first examine the global banana industry.

#### The global banana industry

Bananas are the most popular fruit in the world (UNCTAD 2016). Originating in South-East Asia, banana plants are understood to be one of the first food crops to be domesticated by humans (UNCTAD 2016). Because of the specific growing conditions required (bananas grow best in tropical climates) the production of bananas is concentrated mostly in the world's developing nations. In these countries bananas perform an important dual role:

1. They are an important commodity for export incomes of developed countries; and

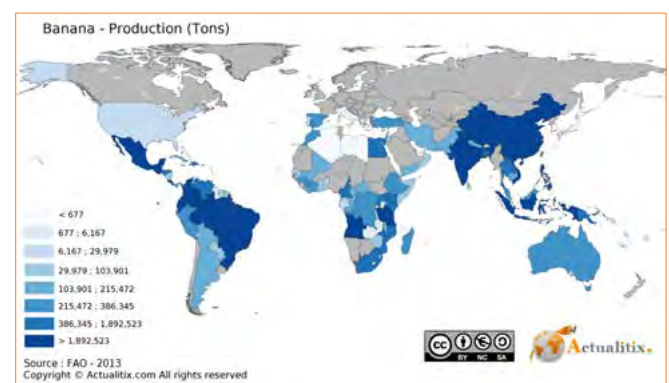
2. They are also a fundamental staple food (like rice, wheat and maize) necessary for the sustenance and survival of many populations.

Bananas are therefore a complex global commodity that present a range of economic, social, political and environmental challenges.

#### The global production and trade of bananas

As Figure 1 shows, the majority of the world's banana production occurs in developing countries predominantly located in tropical and sub-tropical regions. India is by far the largest producer of bananas in the world producing up to 27.6 million tonnes per year or 26% of total production (Actualitix 2016). India is followed by China (12%), the Philippines (8%), Brazil (7%), and Ecuador (6%) as the top 5 global producers of this food crop (UNCTAD 2016).

Figure 1: World Banana Production (2013)



Source: Actualitix 2016

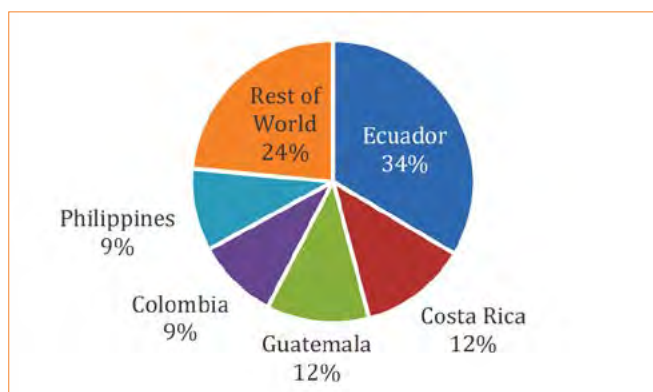
While only 15% of the total global banana production is traded between countries, the geography of global banana trade looks very different to its total production.

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As Figure 2 demonstrates, when we zoom in on global banana exports the dominant banana producers like India, China and Brazil do not play a part. Instead Ecuador becomes the global leader (cornering 34% of the global market) followed by Costa Rica (12%), Guatemala (12%), Colombia (9%) and the Philippines (9%). According to the UNCTAD (2016) the top five major banana producing countries account for more than 75% of total banana production in 2014.

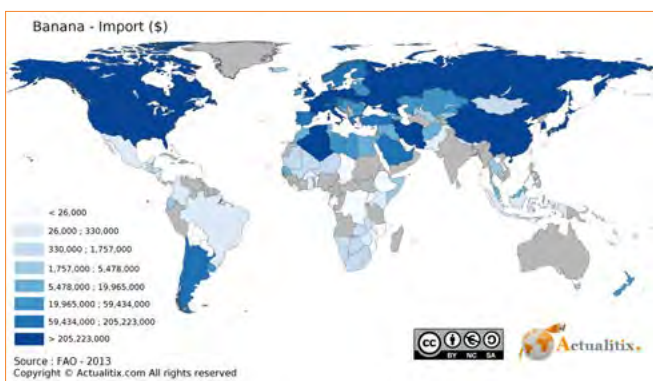
A number of features should be noted about banana exporting nations. First, all of the major banana export countries are classified as developing. Second, these countries have become dominant exporters of bananas not only because they offer the right climatic and rainfall conditions for the successful commercial farming of bananas but also because they offer very low labour costs. Such an economic advantage is difficult to surmount through mechanization as banana production is, in general, labour intensive due to banana plants requiring extensive care to ensure that the fruit arrives in a high-quality state. Last, the banana exporting countries are highly dependent on bananas for income and employment. For instance, in many of the Windward Islands countries, like St Vincent and the Grenadines, banana exports can account for up to 22% of total value of exports (UNCTAD 2011). This makes these countries extremely vulnerable to volatility in global banana prices.

**Figure 2: Major Banana Exporting Nations**



Source: Data used from UNCTAD 2016

**Figure 3: Major Banana Importing Nations (2013)**



Source: Actualitix 2016

When we examine the main destination countries for these banana exports (see Figure 3) the geography shifts from the southern hemisphere to the north, with the European Union (44%), the United States (17%), Russia (7%) and Japan (6%) being the top four destinations for banana exports (UNCTAD 2016). These three destinations tend to source their bananas from specific regions: the US mostly from Latin America, the European Union from the Caribbean, African and Pacific exporting nations, and Japan from the Philippines.

The above geographies of global banana trade are not just an outcome of natural economic advantages (e.g. proximity to markets, costs of production etc). Rather the trading relationships that exist today are very much a product of the colonial and corporate relationships that developed between different regions in the nineteenth and twentieth centuries. For example the European Union countries tended to source their bananas through those countries (predominantly African and Caribbean) that had been colonies of those European countries (mostly British and French). Such relationships became the focus of trade tensions between the US and the EU in the 1990s known as the 'banana wars'.

## Historical development of the global banana trade and the role of Transnational Corporations

Due to their perishable nature, exporting bananas is a challenge and up until the late-nineteenth century was almost impossible. It was not until two key technological developments occurred – the development of refrigerated marine transport (reefers) and railway transport – that bananas began to be exported in a substantial way. With these two developments bananas could be harvested in their tropical locations and transported quickly and at the correct temperature to arrive in their destination markets in North America and Europe in a consumable state. As a consequence the world trade of bananas did not begin until the late-nineteenth century. However, when bananas finally overcame these geographical barriers, they very quickly became the most important globally traded fruit in the world (UNCTAD, 2016).

The perishable nature of bananas has in the past favoured a highly coordinated integrated supply chain beginning from the growing and picking through to the packing, transport, handling, ripening and distribution of the fruit to the consumer. This resulted in a highly vertically integrated agriculture sector that from its early development in the late-nineteenth, early twentieth centuries has been dominated by Transnational Corporations (TNCs) that have tended to control

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extensive aspects of the supply and marketing chain from direct growing of bananas in producing countries, through to ownership of specialised refrigerated shipping and ripening facilities, to distribution networks in the importing countries. While there is a high requirement for capital investment, these companies make significant profits from the economies of scale they achieve, as they are able to provide consistently large quantities of high quality bananas at lower costs and from different geographical sources as well as through their ability to capture much of the value-adding aspects of the product as it moves through the supply chain. Until recently the production and trade of the global banana industry was tightly controlled by three banana TNCs: Dole, Chiquita and Del Monte (see Table 1), all are either US-owned or represent substantial American interests (Fagan, 2006). The introduction of long-term contracts between producers and supermarkets appears to be fragmenting the market and diluting the control of the traditional banana trading companies.

**Table 1: World market shares of banana TNCs**

	Chiquita	Dole	Del Monte	TOP 3 SHARE
<b>1966</b>	34%	12.3%	1.1%	<b>47.4%</b>
<b>1997</b>	24-5%	25-6%	16%	<b>65-67%</b>
<b>2007</b>	25%	26%	16%	<b>66%</b>
<b>2014</b>	13%	12%	13%	<b>38%</b>

Source: Fagan (2006, p.37), UNCTAD (2011)

The history of the development of the global banana trade is one associated with colonial exploitation, the rise of the TNC and its influence in politics, and environmental degradation. However the average banana consumer has not just stood idly by.

## The concerned consumer: political, social and environmental dimensions of global banana trade

World production of dessert bananas (mainly the Cavendish variety) has increased steadily over the last three decades. This increase in production is due to both an increase in the area under cultivation (that usually comes about through the clearance of rainforests) and an increase in yields (made possible through the development of petrochemical technology such as fertilisers, pesticides and herbicides). Over the same period consumption of bananas have increased on average by 1% per year. Yet, while production and consumption of bananas has increased, the price of bananas as a global commodity has declined on average of 2% per year.

The above circumstances of banana production for global trade meant that in the latter decades of the twentieth century the global banana industry has been challenged by a number issues. Key among these issues are:

1. the problem of banana gluts; and
2. the social and environmental consequences of banana production.

### The problem of banana gluts

Since the mid-twentieth century, and especially since the early-1990s, the banana industry has been beset by a number of banana gluts (periods when the oversupply of bananas drives prices for the commodity below their cost of production). These gluts made the global banana trade, already operating on small margins, extremely volatile. As a means of managing the economic risks associated with banana gluts and the impacts of environmental events like hurricanes and cyclones the banana TNCs have begun to move away from the growing and harvesting stage of the banana production process. For example Chiquita has reduced the number of plantations it owns in Central America from 64% of its total exports in 1984 to 49% in 2002 (Arias et al 2003). However this shifted with companies specifically focusing on the marketing and distribution aspects and sourcing the product through direct contracts with local producers. By doing this the banana TNCs are able to outsource much of the risk of growing while still controlling the key value-adding aspects of the global banana industry.

The banana glut problem that emerged in the 1990s was also a product of the colonial histories of the global banana trade and the anticipation of the Big Three banana TNCs of the opening up of the European Union consumer markets and new markets in the post-Soviet states of Russia and China emerging. However the consumer markets in Russia and China did not emerge as expected, nor did the EU did open its markets. Instead through the formation of the Common Organization of the Market in Bananas (COMB) in 1993 traditionally open markets like Germany were suddenly restricted with preferential access made available to countries in the African, Caribbean and Pacific that were former colonies. Companies like Chiquita, who had increased production in their Latin American holdings in preparation of expanded consumer markets did not anticipate this restriction to the global banana trade and found its European market share cut from 30% to 19% (Arias et al 2003). Chiquita had to divert its surplus stock to other areas in the world effectively driving down the price of bananas.



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In response to effective lobbying from the banana TNCs (Chiquita had supported the 1992 Presidential campaign of Bill Clinton, while Dole backed the Republican candidate), the US Government filed a complaint with the World Trade Organisation (WTO) in 1995 against the EU's granting of preferential access to ACP countries. In 1996 the WTO ruled that the EU's quota system violated international trade rules and gave it until 1999 to reform its trade rules in relation to the importing of bananas. The EU found itself caught between its obligations as a member of the WTO and its commitment to former colonies (Fagan 2006). When it failed to remove these barriers by 1999 the US imposed trade sanctions against a range of European imports. The 'Banana Wars', as they came to be known, between the EU and US, were not resolved until 2001 when the EU sought a bilateral approach and came to an agreement directly with the US instead of through the WTO. By 2007 any concept of quotas for banana imports into the EU were removed. However tariffs, while declining, remain, as do the agricultural subsidies (such as the 'Banana Accompanying Measures' and 'Programme of Options Specifically Relating to Remoteness and Insularity' (POSEI)) for European banana producers.

## 2. Social and environmental consequences of banana production

There are also a number of social and environmental challenges associated with global banana production. Socially the global banana trade has produced highly exploitative labour and contractual conditions in export countries such as:

- Lack of power for small-holder producers
- Long working hours and poor remuneration
- Child labour
- Sexual harassment
- Poor workplace health and safety (e.g. exposure to chemicals)
- Denied the right to collectively bargain and the freedom to associate as workers

Similarly, the environmental sustainability of the banana industry has also been of concern. The expansion and intensification of banana production in large plantations in the 1980s and early 1990s gave rise to a series of environmental problems including:

1. Deforestation
2. Heavily reliant on agrochemicals (product of the monocultural approach to cultivating bananas) which has led to the emergence of resistant pests and diseases to existing agrochemicals

3. Pollution (inadequate disposal of chemical, plastics and biological waste)

These social and environmental issues however have not gone unchallenged with many consumers becoming aware and concerned about the conditions under which the bananas they purchase have been produced. This consumer awareness has been further enabled and responded to by the role of consolidated supermarket/retail chains.

In recent years the market dominance of the banana TNCs have also been challenged by the rise of consolidated supermarket/retail chains that are increasingly able to move backwards through the supply chain and go around the banana TNCs to source their product (UNCTAD 2011). The supermarkets have both responded, and encouraged as part of the competitive strategies, increasing consumer interest in 'fair trade' commodities and those which can be marketed as having lower environmental impact or associated with improvements in (highly exploitative) labour conditions (Fagan 2006, p.37)

As a consequence, banana TNCs have begun to respond to these social and environmental concerns of consumers. For instance, an important part of Chiquita's strategy to shore up its EU market share involved responding to rising consciousness amongst western consumers about environmental and labour conditions in supply countries signing a labour agreement with the International Union of Foodworkers (IUF) and to the 'better bananas project' with the American Rainforest Alliance.

The success of this move to more socially and environmentally responsible production of bananas has met with varying success and are best supported when large retail outlets commit to these standards such as when Sainsbury's and Waitrose supermarkets in the UK sought to sell only Fairtrade bananas (UNCTAD, 2016).



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## The Australian banana industry

### History and development of the Australian banana industry

The development of the banana industry in the 1870s in Australia emerged through our own colonial relationships with Pacific Island Countries. Specifically it was the importation of Fijian workers (Kanakas) for cane cutting in Qld that are believed to be the source of the first banana plants brought here. However it was not until 1891, that Herman Reich started plantations in the Coffs Harbour region of the NSW mid-North Coast that a substantial banana industry began to develop.

**Figure 5: Coffs Harbour's Big Banana**



Source: Wikimedia Commons

While the mid-North Coast of NSW is actually 'sub-tropical' and therefore should not offer the optimum growing conditions for large-scale banana production, this region offered unique conditions for growing bananas and proximity to early consumer markets that made it initially more viable for establishing a national banana industry than North Queensland in the early twentieth century. Geographically, the mid-North Coast is where the Great Dividing Range meets the east coast of Australia, providing steep gradients (to prevent frost) and relatively temperate climates all year round to enable the growing of an albeit smaller, but sweeter banana. Initially, bananas were grown on a relatively small scale in the region, mainly to supply local shops. It was not until the 1930s, when an outbreak of the 'bunchy top' virus in Qld decimated the local banana industry, that NSW experienced an increased demand for its disease-free fruit. Furthermore, the region's relative proximity to the southern consumer markets in Sydney and Melbourne meant that, prior to the extensive use of refrigerated transport, mid-North Coast bananas arrived in these major consumer markets in a 'fresher' state compared to Queensland produce. As a result, by the 1960s NSW supplied as much as 80% of Australia's bananas (Banana Industry Restructure and Recovery Project (BIRRP) 2000).

Today the Queensland banana industry supplies Australia with over 90% of the nation's bananas (see Table 2). The decline of the NSW banana industry had its origins in the 1970s when regular periodic gluts and declining profits in the industry began to emerge (BIRRP 2000). This situation deteriorated during the 1980s and 1990s and was exacerbated by the inability of the NSW industry to organise and manage these gluts effectively. Fragmented marketing, a lack of regional cohesion and the consequent inconsistent quality in the bananas produced in the mid-North Coast area meant that when large-scale banana plantations were established in North Queensland in the late 1980s and early 1990s, the NSW industry found itself unable to respond to this heightened market competition.

The mid-North Coast/NSW banana industry was also disadvantaged by a number of physical characteristics of the region. For example, the steep coastal slopes that prevented frost damage to crops and on which many banana plantations had been established meant that bananas could not be harvested mechanically. A lack of mechanisation meant that the economies of scale that could be achieved on the large flat North Queensland plantations could not be obtained in this NSW region. The steep gradients of mid-North Coast banana plantations also meant that topsoil was more easily eroded. Plantations thus required increasing quantities of costly chemical inputs, such as fertiliser, to compensate for a decline in soil quality. The cooler climate meant that a banana crop would take three months longer to mature than the North Queensland equivalent and that the bananas grown in the mid-North Coast region tended to be smaller and less 'yellow' and therefore less aesthetically appealing to the consumer (BIRRP 2000). The growing domination of Queensland banana production and concurrent decline in NSW, especially since the early 1990s, is summarised in Table 2. By the early 2000s, the mid-North Coast banana industry was unequivocally an industry in decline, with ongoing survival essentially relying on the occurrence of freak events such as disease or cyclones wiping out the North Queensland competition.

**Table 2: Australian banana market throughputs as a percentage proportion of national total by NSW and Queensland**

Year	New South Wales	Queensland
1993	25%	68%
2000	14%	81%
2007	5%	94%
2016	4%	94%

Source: Australian Banana Growers Council (2010, 2016)

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The fierce competition from large plantations of bananas in far North Queensland became more aggressive when Chiquita Brands South Pacific, a subsidiary of world banana giant Chiquita Brands International, entered the Australian market in the 1990s, pursuing the agenda of leading the “rationalisation of Australia’s \$4 billion horticultural industry” (Featherstone 1999, p.14). This included the purchase of large banana holdings in the Tully Valley in North Queensland.

## The Australian-Philippino banana wars

Bananas are Australia’s biggest horticultural industry, generating around \$350 million for the economy each year. The Australian banana market is unique in that we do not import our bananas from overseas. This is because of the biosecurity risk (the main diseases and pests of quarantine concern are Moko, black Sigatoka, and Freckle) that imported bananas pose to the local industry. The monocultural nature of bananas means that whole crops are particularly prone to being wiped out by these diseases. However Australia’s island status means that it has been able to remain relatively disease free. As a consequence of these quarantine restrictions the Australian banana industry has been able to remain relatively protected from the low cost banana imports (due mainly to the low cost of labour) from major banana exporting nations like the Philippines.

**Figure 6: ‘No Banana Imports’ sticker protesting the consideration of importing bananas into Australia**



Source: Australian Banana Growers Council

However, like the US-EU ‘banana wars’, the Philippines challenged Australia’s biosecurity justification for preventing banana imports through the WTO in 2003. The Philippines argued that quarantine restrictions breached trade laws and threatened to place trade sanctions on the importation of Australian dairy products. In 2004 Biosecurity Australia responded by reversing its decision to restrict Philippino banana imports. Biosecurity Australia deemed that the risk of disease was not as high as previously determined. This was challenged by Australian banana growers and the

initial decision was suspended for a number of reviews to take place. In 2009 Biosecurity Australia found that banana imports could come in under more stringent quarantine conditions for 27 pests and diseases of concern. However, the bar has been set so high that no import application has been made under the new protocol, with Philippine exporters saying the measures are too strict and too costly to attempt to begin exporting bananas to Australia.

## Woolgoolga: a local case study of the changing fortunes of the Australian banana industry

Travelling north along the Pacific Highway, approximately 25 km from Coffs Harbour (a coastal community in NSW), a large white temple appears on the right as you enter the township of Woolgoolga (Figure 7). The temple is a *gurdwara*, one of two in a town that has a population with fewer than 4,000 people. People of the Sikh faith, the majority of whom come from the Punjab region in northern India, use this gurdwara for religious and community events. Members of the Woolgoolga Punjabi-Sikh community are also major participants in the local agricultural industry of bananas.

**Figure 7: Sikh Gurdwara Woolgoolga NSW**



Source: Dufty-Jones, 2007

The migration of Sikh people from the Punjab region in British India began during the nineteenth century. According to Bhatti and Dusenbury (2001, p.39) poverty was rarely the driving reason informing this early period of migration. Rather, it was the desire to improve the family’s position – or *izzat* – at home that often motivated an individual’s decision to move to Australia. The migration provided opportunities to remit the money earned in Australia back to the Punjab, using it to acquire land, build a brick home or to provide a sufficient dowry for a daughter to ‘marry



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well! This was particularly important as many of the Punjabi-Sikhs migrating to Australia at this time were **Jats**, a rural landowning caste (De Lepervanche 1984, Bhatti and Dusenbery 2001). This rural background meant that early Punjabi-Sikh migrants tended to look for and obtain work as seasonal labourers in agricultural industries, travelling between the Atherton Tablelands in Queensland and the Northern Rivers Region in NSW. Early migrants regularly worked as cane cutters and farm hands on cane and banana farms in these areas. While the introduction of the White Australia Policy in 1901 made such migration more difficult for Punjabi-Sikhs, unlike many other non-Anglo-Celtic ethnic groups, this legislation did not make migration to Australia impossible. This was because of India's position as a colony of the British Empire which meant that its citizens could migrate if they could pass a dictation test or prove, through a certificate of domicile, that they had resided in Australia prior to the introduction of the White Australia Policy (Bhatti and Dusenbery 2001, p.44). As a consequence, Punjabi-Sikh migration to Australia continued throughout the early decades of the twentieth century, although at a reduced rate.

Prior to World War II, Punjabi-Sikh migration to Australia was generally pursued as temporary 'sojourn', – an opportunity for men to accumulate savings through their work in Australia and, on their return to the Punjab, use those earnings to contribute to the family's **izzat** (Bhatti and Dusenbery 2001). A number of events during and after WWII, however, shifted this migration from being a temporary visit to becoming a permanent move. Central to this was the partitioning of India and Pakistan in 1947 and the political, economic and social instability that ensued. Work also became more readily available in Australia during this time. For Punjabi-Sikh migrants, now wishing to establish themselves in Australia permanently, Woolgoolga emerged as a preferred location.

According to Bhatti and Dusenbury (2001, p.129), 'for the Punjabis, the banana industry has been solely responsible for their firm establishment in the Woolgoolga-Coffs Harbour area'. Seeking employment during the 1930s and 1940s, a number of Punjabi-Sikh men had moved south from the Northern Rivers Region in NSW to work on banana plantations in the Woolgoolga-Coffs Harbour area. By the early 1940s, a number of men had decided to stay in the region, with the employment in bananas, along with some itinerant cane cutting work, being sufficient to warrant establishment in the area. As they became able to support their families, these Punjabi-Sikh settlers brought their wives and children to join them. Eventually these families were able to buy their own

banana plantations and their success drew other Punjabi-Sikhs from India and northern Australia to migrate and establish themselves in Woolgoolga (Bhatti and Dusenbery 2001).

Described as a 'poor man's (sic) industry' (De Lepervanche 1984, p.90), banana farming provided a comparatively easier start than most other agricultural industries (for example, cane, wheat, dairying). This was due to the relatively low level of capital needed to establish a plantation. Bananas required little outlay for machinery and other equipment, with success mostly relying on a farmer's access to sufficient manual labour, something that was provided through family and community networks (Bhatti and Dusenbery 2001). Punjabi-Sikh settlers were also assisted by the NSW State Government's policy at the time to lease State Forest land to facilitate its development for agricultural purposes (De Lepervanche 1984). This enabled individuals to transition from labourers, to sharecroppers, to eventually becoming owners of banana plantations within a relatively short time frame. Banana farming also offered the advantage of being familiar work for those who had come from an agricultural background in India. Furthermore, the independence of being farmers, and therefore their own 'boss', meant that Punjabi-Sikh settlers were able to more easily capture the profits from their own labour. This independence also provided many members of the community with the flexibility of pursuing and maintaining important religious and cultural traditions (Bhatti and Dusenbery 2001). The success of this community in establishing themselves in the region's banana industry over the last 70 years can be marked by the fact that Punjabi-Sikh men and women were by the turn of the twenty-first century the dominant growers in the region, accounting for more than 90 per cent of the industry around Woolgoolga and more than 50 per cent around Coffs Harbour (Bhatti and Dusenbery 2001: 129).

As previously mentioned, the past two decades have witnessed a decline in the viability of the NSW banana industry. This has been largely attributed to the movement of the banana industry to Queensland, which currently produces over 90% of Australia's banana stock. This industry decline in NSW has impacted on the economic status of the Woolgoolga community, and in particular the local Punjabi Sikh community. The declining viability of banana farming in the region coupled with the high cultural status attributed to land ownership and farming in the Punjabi Sikh community has produced a variety of strategies designed to cope with the changing economic circumstances of the local banana industry. These include:

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- Pluriactivity – especially female family members becoming employees of the large-scale blueberry farm Blueberry Farms Australia (BFA)
- Diversification – into other high-value horticultural products (e.g. blueberries, avacados, etc)
- Sub-division – for residential development
- Selling-up and moving away – especially as younger generations show less interest in continuing the family farm.

It is important to recognize that the changes to the banana industry have also brought about significant socio-cultural changes to the community as well. For instance cultural activities associated with the Punjabi-Sikh community have shifted from being something that could occur any time of the year to predominantly taking place in the winter months when there is little work to be obtained at BFA. This change has occurred due to the centrality of women to the maintenance of these cultural practices as a local community worker noted

*We plan all of our programs that involve ethnic groups for winter. The whole community is affected. From April to August [winter time] I have no Saturday free because there is always something have to go do at the temple... these things [community and cultural activities] are all planned around the blueberries. ... And people say things like 'Oh the women are not going to be available to do the cooking' ... so people try to have all the stuff in the winter. And it's been like that for a number of years. So that's affecting the community.*

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- Nation Master (useful for producing maps, barcharts and pie charts of global banana production, banana exporting and banana importing countries go) <http://www.nationmaster.com>

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