Producer country file

The banana in Côte d'Ivoire

by Noémie Cantrelle and Thierry Lescot

A historic player in the banana trade, Côte d'Ivoire has been the leading African exporter since 2014, overtaking Cameroon, and exporting 404 000 tonnes in 2018. It has become the no.4 supplier to the European market, currently occupying the world no.9 position. After a period of instability between 2002 and 2011, Ivorian exports have found renewed growth, especially to the EU, their core market, and also to the country's West African neighbours (Burkina Faso, Ghana, Guinea, etc.). The greater political stability observed since the mid-2010s has been favourable for investment, helping the sector's surface areas to achieve considerable expansion.

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History

Commercial cultivation of the banana in Côte d'Ivoire developed late compared to Guinea and especially Cameroon. Exports, limited to a few attempts starting from the 1930s, only really progressed after 1958, after growers from Guinea-Conakry settled in the Agnéby valley, emigrating hurriedly hurriedly when the country became independent. From 1963 to 1980, the production level soared, with the first record set in 1972 with 160 000 t. However, Côte d'Ivoire lost some of its international standing, with exports stagnating between 120 000 to 140 000 t in the 1970s, and slipping even further in the 1980s to between 80 000 and 100 000 t. There are various factors explaining this decline: the ravages of yellow sigatoka, which led to varietal conversion, a succession of climatically unfavourable years, and also difficult access to the European market (tougher packaging standards and increasing competition from Latin American origins), without any commercial alternative emerging. These developments led to the near-complete disappearance of small plantations, which had previously numbered as many as 750. From the start of deregulation in 1989, the sector began to expand once more, driven by professional organisations such as OCAB (Central Organisation of Pineapple and Banana Growers), created in 1991. This helped organise the small and medium-sized growers, improve and invigorate production, quality and marketing, while defending the interests of the Ivorian growers. The gradual modification of the preferential access system to the EU market (establishment and then elimination of import quotas by origin or type of origin in the 2000s), and its deregulation from 2006, forced Côte d'Ivoire to improve its competitiveness.

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Location

The banana plantations are situated primarily within a radius of 200 to 250 km around Abidjan, the country's port of lading and economic capital. Nationally, there are five main regions: Lagunes (Dabou, Niéky, Songon, Tagbadié, Attinguié, and then Tiassalé, Taabo, Pacobo, Ahondo), Agnéby (Agboville, Azaguié, Adzopé), Moyen and Sud-Comoé (Abengourou, Aboisso, Ayamé), Yamoussoukro (Toumodi, Banourebo, Angouassi) and the upper Bandama valley (Béoumi, Niakaramandougou). While the peaty flood-prone plains of Niéky in the Lagunes region used to represent the main production zone, their contribution is now on a downward trend because of the difficulties maintaining ageing infrastructures (canals, dykes, etc.), essential factors in this polders zone. Production has been significantly extended toward the drier zones of north-west Abidjan, toward Tiassalé and Yamoussoukro (along the River Bandama and Lake Kossou, but also on the tributary of the Bandama, the Nzi), less affected by black sigatoka. The assets of this region are also related to its rapid access to Abidjan via the new motorway, good land availability, as well as the proximity of the River Bandama (and the Nzi) for the irrigation which is required. Further north, in a zone which is drier and colder at night, along the River Bandama between Bouaké and Korhogo, there are also two new small production zones. There are approximately 250 ha aimed at organic production. The proximity with Mali and Burkina Faso facilitates the regional supply networks.

With the exception of this latter production zone, the plantations are situated in a tropical forest climate, characterised by two rainy seasons. The longer and more intense is centred on June, and the shorter is at its height in October. Between the two there is a brief season with limited sunshine. The total insolation is around 1 600 to 1 800 hours per year. Rainfall, very mixed in recent years, is on average 1 200 mm/year for the northernmost parts of the production zone, and 1 900 mm/year for those situated further south and south-east. However, irrigation remains essential six to eight months of the year, and all the plantations are equipped. The average temperature is 26°C, with little daily swing. The topography is flat or very slightly sloping, meaning that many sites can have cableways installed. There can be violent winds in the inter-season periods, especially at the end of the main dry season, albeit without seriously affecting national production. Tornadoes, which have become increasingly unpredictable, can create major disruption. It is estimated that they cause losses of 5 to 10 % per year. Some more exposed sites have invested in guylines. It should be noted that climate events are tending to become increasingly marked and less seasonal. The soils vary in quality, and can be clayey, gravelly or peaty. Some intense spells of rain always pose a big risk to production situated in polders (Niéky zone), which require practically constant pumping.

Production

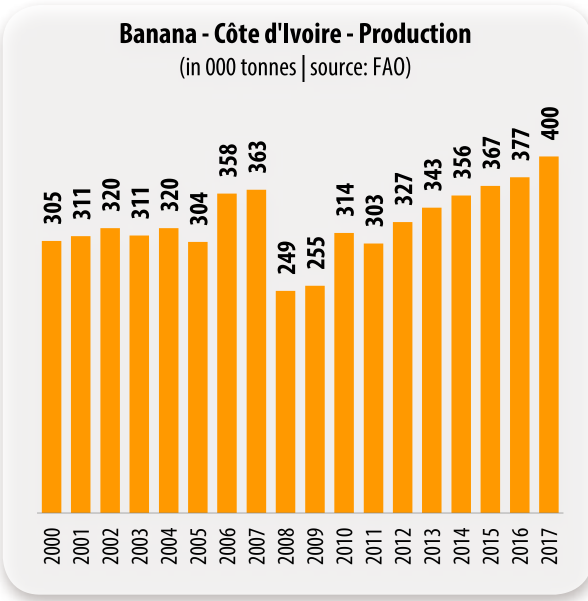
Surface areas in cultivation were estimated at around 10 000 ha in 2019. The increase of more than 1 500 ha in two years was due mainly to the strong progress made by new players in this country.

Overall, the production technical level is good, with excellent yields for the conventional segment (from 30 t/ha in 1994 to 50 t/ha on average at present, varying from 30 to 60 t/ha according to location and investment). For relatively old plantations, there is a downward trend due to soil parasites, which are on the increase because of poor integration and/or management of fallowing. Recent plantations have been set up directly on virgin land with healthy plant stock (vitroplants). Hence soil pressure for the moment seems very limited, and in combination with good technical command, this means that very good yields can be achieved.

Sanitary management became increasingly complex from the 1990s due to the appearance of black sigatoka in the east of the country, which spread rapidly, gradually taking over from yellow sigatoka across all zones. Recently, pressure from the disease has increased greatly because of increased resistance to the treatment products used. Traditional preventive management of the disease, of 12 to 17 above-ground treatments on average per year, has given way to systematic use of contact products with up to 40 treatments per year on certain plantations. This practice, not yet generalised, is in increasingly common use, while a return to a biological warning system (based on accurate observation of the development of the disease), greatly limiting the number of treatments, is still possible. The parasitism mainly consists of nematodes and weevils. The gradual introduction of vitroplants from the 1990s has enabled some degree of land remediation prior to replanting. However, the sanitary situation of the soil remains concerning, in particular with regard to the weevil. Indeed the strict fallowing technique (without even minimal reuse of old stems, hard to detect as they are concealed by natural vegetation or poorly adapted cover plants, such as Tithonia diversifolia) is not always respected, leading to a rapid recovery in nematode populations. Under these conditions, replanting proves necessary every five or six years. This parasite problem (weevils and nematodes) is being addressed without making use of synthetic pesticides (trapping, fallowing, vitroplants).

Organic production plantations have also increased in recent years (around 500 ha in 2019), with similar yields to conventional. The main constraints encountered in organic agriculture are fertilising, management of black sigatoka and weeds in the absence of service plants. The main amendments used for fertilising are the cacao husk (an abundant source, since the country is the world number 1 producer) and coffee husk, as well as chicken droppings. Significant quantities are required (approaching 90 tonnes per hectare!), which entails extensive logistical organisation. Weed management is being trialled using service plants (e.g. Heterotis totundifolia) as an alternative to herbicides. Another major constraint is management of conservation diseases.

Although the very poor international conditions in 2018 curbed the expansion of surface areas, the Ivorian banana sector is exhibiting a good growth dynamic. Availability of labour (qualified or otherwise) remains a major constraint.



Banana - Côte d'Ivoire - Production
(in 000 tonnes | source: FAO)

Organisation

The banana sector is concentrated in the hands of seven operators:

- SCB group (Société d'étude et de développement de la Culture Bananière), a subsidiary of Compagnie Fruitière, owns nearly half of the country's plantations, representing 4 600 ha, and mainly comprising its own farms and those of a few associated planters. It incorporates production but also logistics (shipping company Africa Express Line – AEL), ripening and downstream trading. On its own it exports nearly two-thirds of the country's production (main brand: SCB).
- FB SAS (France Banane) and an African private investment fund now own 1 900 ha of banana plantations (formerly SAKJ group, and formerly Canavese). Green fruit is marketed in Europe by FB SAS under the Banatop brand.
- The Belgian group SIPEF (Société Internationale de Plantations et de Finance) has full ownership of Plantations J. Eglin SA, which runs three plantations in Azaguié, Agboville and Motobé. The total number of hectares went from 570 ha in 2015 to approximately 800 ha in 2018. The bananas are marketed mainly under the Comoé brand.
- The CFA cooperative brings together independent growers, including SPDCIE which produces in Dabou (approximately 300 ha planted and non-planted) and in Akoudjé (Tiassalé zone), and which possesses approximately 80 ha in production. The fruit is marketed mainly under the Wanita brand.
- SIAPA (Société Ivoiro-Antillaise de Production Agricole), created in 2010 by Guadeloupian operators, has 200 ha in production (conventional) in the Tiassalé zone. These bananas are marketed in particular under the Issi brand.
- BANACI (Bananes Antilles Côte d'Ivoire), created in 2013 by operators on Martinique, cultivates 1 110 ha, 310 ha of which organically (two sites), in the Tiassalé and Yamoussoukro zones. These bananas are marketed in particular under the Issi brand.
- BACIBAM, created in 2016, has 530 ha in production on two sites in the Yamoussoukro zone. These bananas are marketed in particular under the Issi brand.
- At the initiative of a Guadeloupian economic player, a new planting project of approximately 1 200 ha could be launched in the Tiassalé zone.

All the operators, but mainly the newcomers, have contributed to the surface area expansion. The growers are members of two professional organisations recognised by the Ivorian State: OCAB, created in 1991, and OBAM-CI, founded in 2009 following the split-up of OCAB. The plantations and packing stations have standards in line with the various norms and certifications introduced from the 2000s, namely Globalgap, ISO 14001, Tesco Nature's Choice, organic certification and also Rainforest Alliance. Fairtrade certification is making considerable progress, to meet the requirements of the market. Finally, organic certification can also be found among both newcomers and existing operators.

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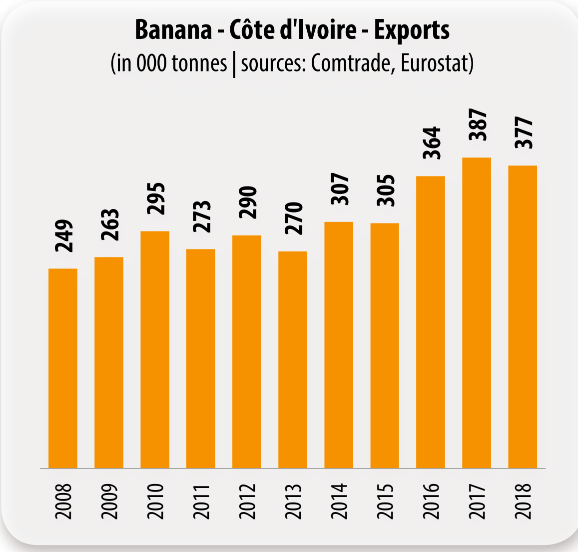
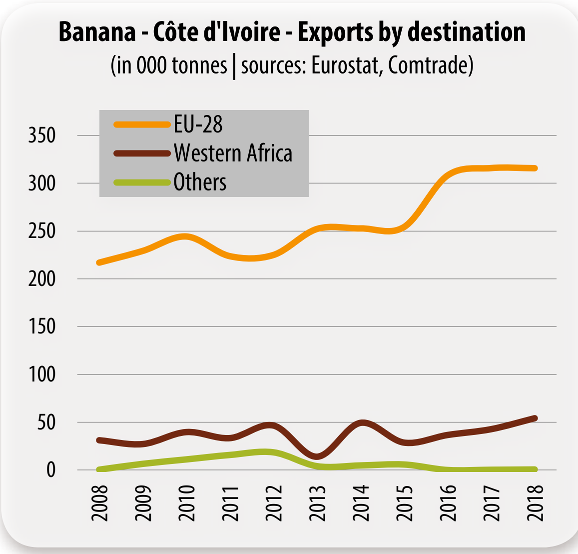
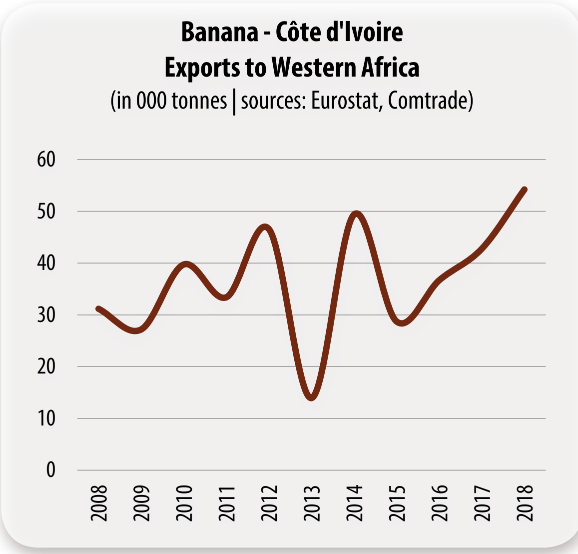
Exports

The banana plays an important role in the Ivorian economy and is one of the main export crops. It represents approximately 8 % of the agricultural GDP and 2 to 3 % of the national GDP, providing nearly 8 500 direct jobs, and double that number for indirect jobs. Since early 2014, Ivorian exports have constantly risen, going from 326 000 tonnes to 404 000 tonnes in 2018. Approximately 80 % of exports are bound for the European Union, its historical market where its ACP status has since 2008 entitled it to zero customs duty, with no volume limitations. The main entry points are France (Port Vendres serving Southern Europe and Dunkirk serving the north of France), and Belgium and the United Kingdom for Northern Europe. The remaining volumes are aimed mainly at the West African sub-region (ECOWAS countries), and to a lesser degree at the Mediterranean. Regional exports embarked on a distinct increase from 2015, and now represent 20 % of exports. Sorting rejects are aimed mainly at the local market, which is exhibiting increasing demand but is also increasingly demanding (rising living standards, as well as small Ivorian ripeners and European distributors setting up, especially in Abidjan). A new ripening plant in Abidjan (Koumassi) is helping improve the quality of bananas sold locally.







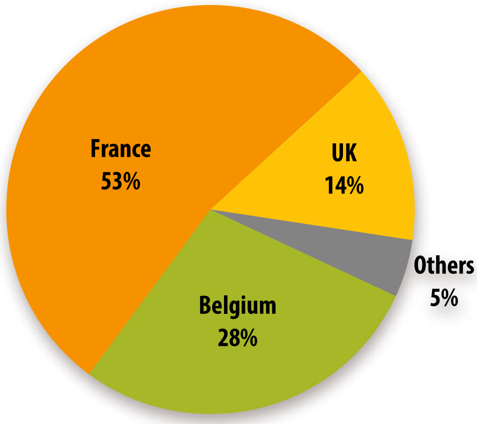
Logistics

The containers or pallets are transported by road-freight to the port of Abidjan. The access roads to the plantations are mostly tarmacked and in decent condition, with the exception of some sites which still have stone tracks. The port of Abidjan operates fairly well. The sea-freight services, an important condition for market access, have become distinctly concentrated, especially since the synergy with the pineapple industry, which is becoming marginalised, no longer plays such a crucial role.

Two-thirds of volumes bound for Europe are exported via the fruit quay and AEL's conventional ships. The fruit quay is equipped with coolers. Management of the fruit terminal of the Autonomous Port of Abidjan (PAA) has been entrusted to Compagnie Fruitière Group, via its shipping agency EOLIS-CI. The AEL fleet (9 ships) runs two turnaround routes: to Northern Europe and to Southern Europe.

The remaining third of volumes is shipped in refrigerated containers on generalist shipping lines.

Banana - Côte d'Ivoire - EU imports by Member state (2017 / Source: Eurostat)



Banana – Côte d'Ivoire – Sea freight

Port of departure	Port of arrival	Transit time
Abidjan to Northern Europe	Dakar, Portsmouth, Antwerp	10-11 days
Abidjan to Southern Europe	Dakar, Port Vendres, Vado	9-11 days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Banana Accompanying Measures (BAM)

The BAM amounted to 44.75 million euros, and the first instalment was paid in Q1 2014. Despite the delayed and slow implementation of this programme, its impacts are already visible. The main lines of action adopted are as follows:

- improve the competitiveness of the existing plantations and extensions;
- create blocks of village plantations, and support these blocks;
- develop the local and sub-regional markets;
- continue improvement of workers' living conditions and environmental protection.