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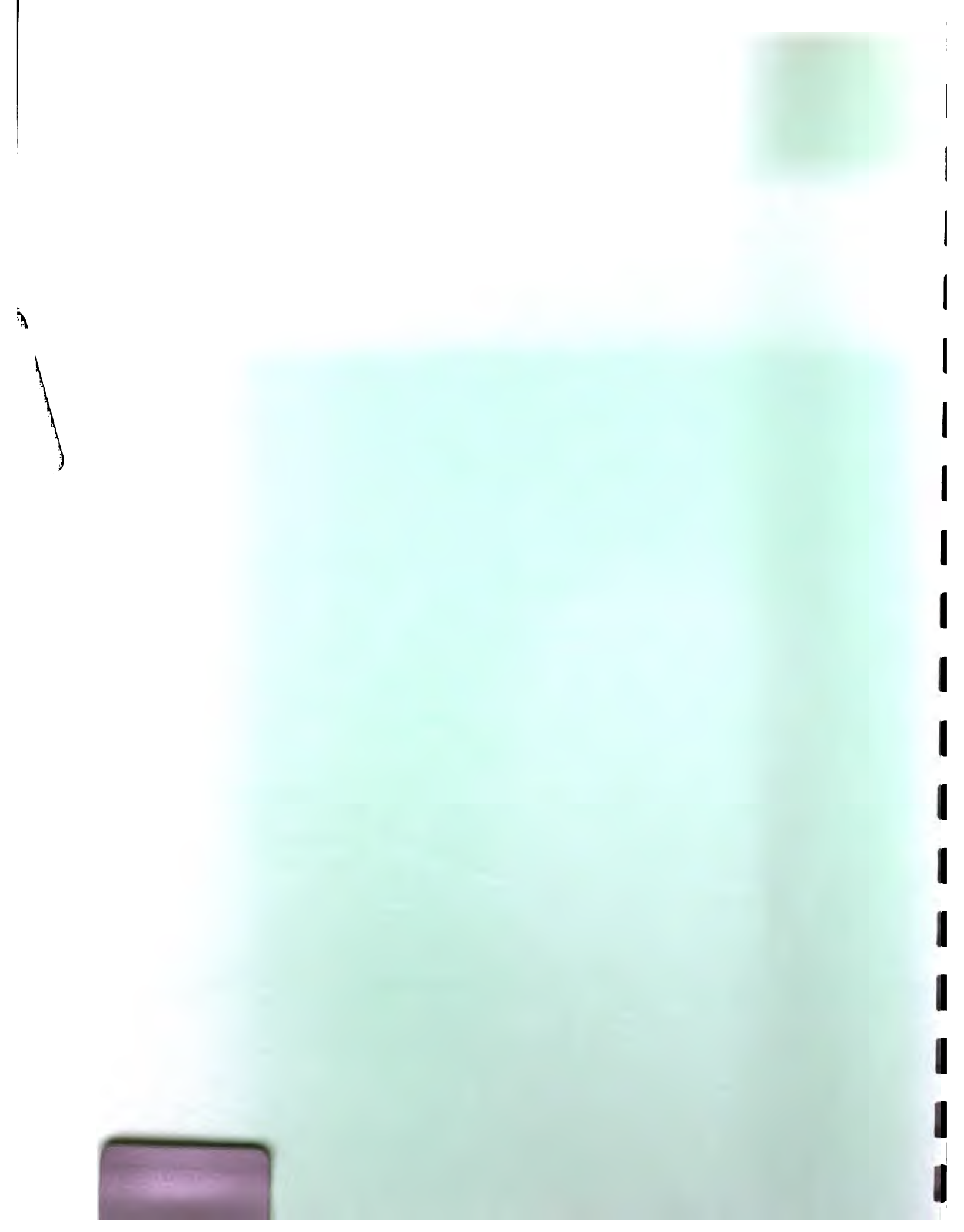


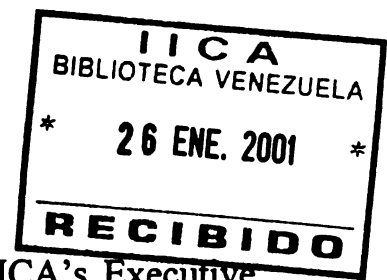
**THE BANANA SECTOR OF
COSTA RICA**

**PRODUCTION, ORGANIZATIONAL
AND INSTITUTIONAL ASPECTS OF
THE INDUSTRY**

**Kingston, Jamaica
June 1999**

IICA OFFICE IN JAMAICA



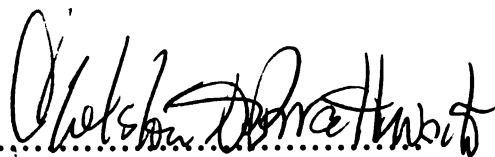


INTRODUCTION

In October 1998, during a visit to Costa Rica to attend IICA's Executive Committee Meeting, the Honourable Roger Clarke, Minister of Agriculture in Jamaica, requested that IICA facilitate a study of the management of the coffee, banana, sugar and beef sub-sectors in Costa Rica as a basis for providing input into the ongoing debate on the modernization of these industries in Jamaica (bench marking).

The study was designed to address the issues as defined in the terms of reference (Appendix 1). The study was supported by the Programme for Horizontal Technical Cooperation in Agriculture between the countries of Latin America and the Caribbean (CARILAC).

The IICA Office in Jamaica in cooperation with the Centre for Agribusiness (CIDAE), the Centre for Projects and Programs (CEPPI) and the IICA Office in Costa Rica, facilitated the Minister's request and is pleased to present the attached document on the banana sub-sector for consideration by the Minister.


.....
Dr. Chelston W. D. Brathwaite
IICA Representative in Jamaica

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COSTA RICA: THE BANANA SECTOR: PRODUCTION, ORGANIZATIONAL AND INSTITUTIONAL ASPECTS OF THE INDUSTRY¹

1. BACKGROUND

- 1871. Introduction of the banana industry, given the opportunities presented by the recently constructed railway leading to the Atlantic Sea.
- 1899. Minor K. Keith joins with Tropical Trad. and Transp. Company, forming United Fruit Company which dominates the banana industry in Costa Rica.
- 1913-1944. The World Wars and economic depression affect the world banana market.
- Problems in Costa Rica due to depleted soil, poor technology and incidence of diseases such as "Sigatoka" and the "Mal de Panama" ("the Panama disease"). Faced with this situation, the United Fruit Company decided to move to Limón² in the South Pacific.³ The control over transportation and the facilities accorded by Central American states made the United Fruit Company a monopoly in the field. Costa Rica opted to give the opportunity to new companies to develop this activity, for example, the Standard Fruit Company which cultivated the abandoned lands of the Atlantic and then expanded to Valle de la Estrella⁴ (Star Valley). Moreover, Ecuador prohibited the participation of transnationals, causing the migration of these companies to Central America, putting an end to the United Fruit Company monopoly.
- 1979-1984. Approximately 8,000 hectares were abandoned in the Southern and Atlantic Regions, due to crop diseases and labour problems.
- 1985. The Government by Executive Decree No.16563-MAG instituted the Area Restitution Plan, coordinated by the National Banana Association (ASBANA) with the support of the National Banking System (NBS) in an effort to renew the activity, introducing an incentive of US\$0.30 per box exported. The intention was always to keep 50% of production in national hands. Some incentives were established for a period of eight years. The export tax was \$0.30 per box of 18.14 kg which the commercial company should hold and pass on to CORBANA.

¹ Torres H. JE, Salazar A. C., Gutierrez M. C

² Limón is the seventh province of Costa Rica located in the Atlantic side of the country

³ The South Pacific section of Costa Rica. It includes the Costa Rican Pacific Zone

⁴ Located in the province of Limón

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II. ECONOMIC IMPORTANCE OF BANANA

2.1. Area Under Cultivation

During the 90s, the banana producing area grew constantly, moving from 28.296 hectares in 1990 (6.1% of agricultural land of 463.992 hectares) to 49.19 in 1996 (11.1% of total agricultural land of 418.802 hectares), representing a growth of 73.8% for that period. (See figure 1.6)

2.2. Contribution to the Gross Domestic Product (GDP) (1990-1997)

The contribution of banana production to GDP continued to fluctuate between extreme values of 547.9 million colons⁵ (4.4% of GDP) and 819.9 (5.3%) in 1990 and 1995 respectively. For the period under discussion (1990-1997) there is a difference of 34.1% between the two extreme poles. (See Table 1.1)

2.3 Contribution to the Gross Domestic Product in Agriculture (GDPA)

The contribution of the banana activity to the GDPA for the period 1990-1997, between 23.2% in 1990 (GDPA was 2 368 million colons). For a period of nine years the GDPA increased by 19.8%, as a result of a change from 2 366 to 2 835 million colons.

2.4. Employment

For the period 1991 to 1997 employment in the banana sector increased by 10, 580 moving from 22, 378 person employed in 1991 to 32, 958 in 1997, representing 12.5% of the total number of persons employed in the agricultural sector. (See table 1.2)

III BANANA MARKET

3.1. International Market

3.1.1. World Banana Production

- Banana is the third fresh product export in the world, after grapes and citrus.
- In 1995, the main producing countries in the world were Brazil with 307.5 million boxes⁶ of which only 4.6(0.2%) were exported, reflecting a high consumption of banana. India produced 261.3 boxes which went to local consumption.

⁵ In 1996 colons at the exchange rate of 6.40 colons for \$US1

⁶ 1 box = 18.14kg

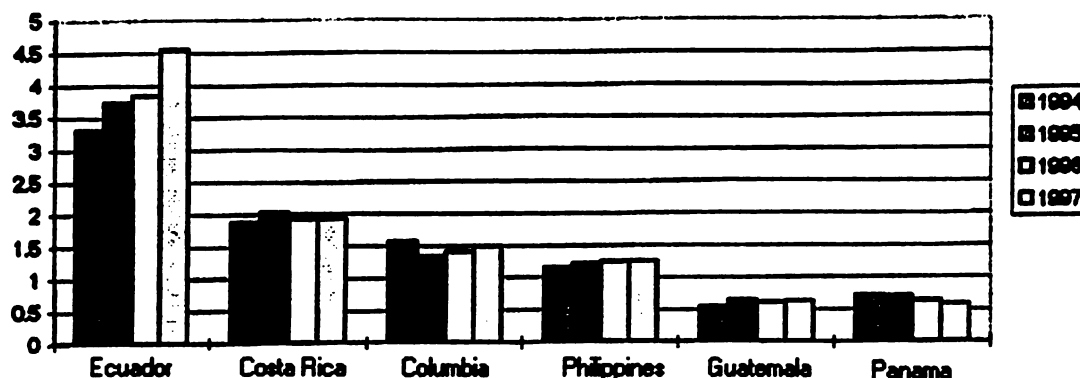


3.1.2 Main Banana Exporters

Main banana exporting countries are Ecuador, Costa Rica, Colombia, the Philippines, Guatemala and Panama (see Table 1.9 and Figure 1.1)

- Ecuador increased its exports between 1994 and 1997 by 1.24 million tonnes moving from 3.31 to 4.55 million tonnes.
- Banana production in Costa Rica for the period 1994-1997 registered moment in the volume of scales from 1.88 million tonnes in 1994 to 2.03 million in 1996, representing a growth of 3.2 % for that period.
- For the period 1994 to 1997 there was fluctuation in Colombian exports following a 5.1% reduction to 1.34 million tonnes in 1995 compared to 1.57 in 1994.
- The Philippines increased its volume of exports from 1994 to 1997 by .10 million tons, moving from 1.16 to 1.26 million tonnes for that period.
- During the period 1994-97 Guatemala increased its banana exports from 0.54 million in 1994 to 0.65 million tonnes in 1995. There was an overall increase in production of 16.7% between 1994 and 1997.

Figure 1-1. Main banana exporting countries in millions of tonnes 1994-1997



Based on World Bank data, 1999

3.1.3 Main Banana Importers

The European Union and the United States of America are the main world importers of banana. Other important markets are Japan, China, Russia and Canada (see Figure 1.2 and Table 1.10).



The European Union experienced fluctuations in its banana imports between 1994 and 1997, between 3.11 million (1995) and 3.41 million tonnes (1997), representing a 7.2% increase for this period.

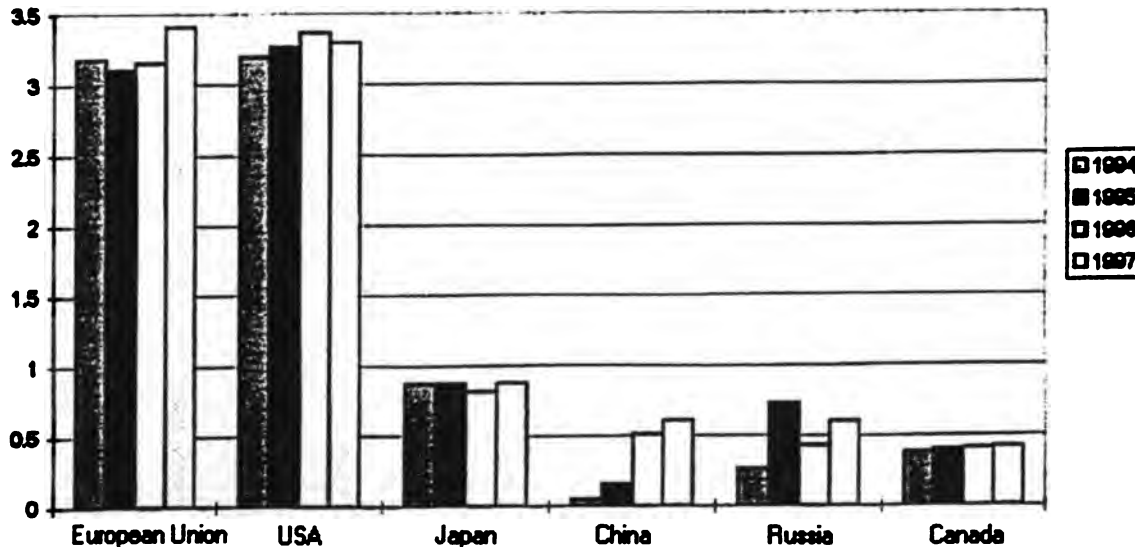
For the period 1994-1997, the United States of America increased its banana imports volume by 0.10 million, moving from 3.20 million in 1994 to 3.30 million tonnes in 1997.

Japan's banana imports fluctuated between 1994 and 1997, moving from 0.82 million tonnes in 1996 to 0.88 million tonnes in 1997. This difference represented an increase of 1.1%.

Between 1994 and 1997, China increased its imports from 0.05 to 0.61 million tonnes, representing an increase in imports eleven times that of 1994. In terms of number of 18.4 kg boxes, China imported a total of 33.6 million boxes.

Canada increased the volume of its banana imports from 0.38 to 0.42 million tonnes between 1994 and 1997, representing an increase of 8.6% for that period.

Figure 1.2: **Main World Importers of Banana**
Value in millions of tonnes
1994 – 1997



Source: Based on World Bank Data, 1999

- The uncontrolled expansion of cultivated areas saturated the world market and this worsened with the institution of the European regime of "Export Quotas" in 1993. Trade restrictions produced a glut in Latin American countries, with the surplus being redirected to the United States.

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- The Framework Agreement on Banana was signed in 1994 for the allocation of percentage participation of member countries of the Union of Banana Exporting Countries (UPEC)⁷ The agreement stipulated the following :
 - a) The basic international tariff quota was fixed at 2.1 million tonnes in 1994 and 2.2 in 1985 and subsequent years, subject to change.
 - b) In the event a country is unable to fill its quota, the difference shall be distributed among those countries with a percentage of the overall quota in the same ratio percentage participation.
 - c) When the Community requests increases in the overall quota, this will be distributed in relation to the same percentage share. Beneficiary countries may solicit adjustments in distribution.
 - d) The quota tariff will be 75 ECUS per tonnes. The agreement expires on December 31, 2002.
 - e) This agreement is covered by the GATT referendum
- Costa Rica has a 25.6% share of the export quota to the European Union.

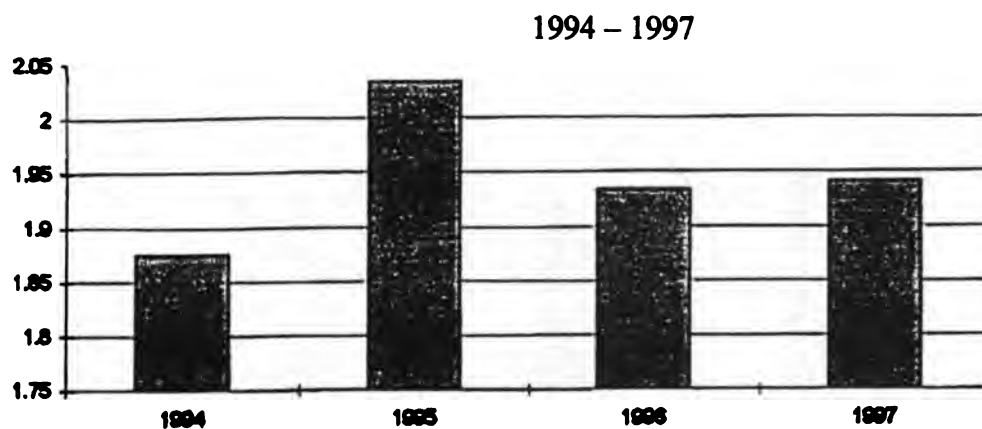
3.1.4 Participation of Costa Rica in the International Market

- For the period 1990 – 1997, exports from Costa Rica fluctuated between 1.88 and 2.03 million tonnes for 1994 and 1995 respectively, years of greatest difference. For period 1994-1997 Costa Rica experienced an increase in 3.2 % of volume traded. (See tables 1.4 and 1.7 figures 1.3 and 1.4)

⁷ Given the situation of the banana world trade and with the objective of developing an international negotiating front with multinational companies, the Union of Banana Exporting Countries (UPEC) was formed at the initiative of Costa Rica. UPEC sought to manage and regulate supply and demand at the international level with the objective of controlling and maintaining prices. The countries involved were: Panama, Honduras, Guatemala, Costa Rica, Dominican Republic, Venezuela and Colombia. Today, UPEC is not as important, due to the financial crisis experienced by member countries and problems in the banana industry. Nowadays it is a political entity.

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Figure 1.3: Costa Rica: Banana Export (in millions of tonnes)

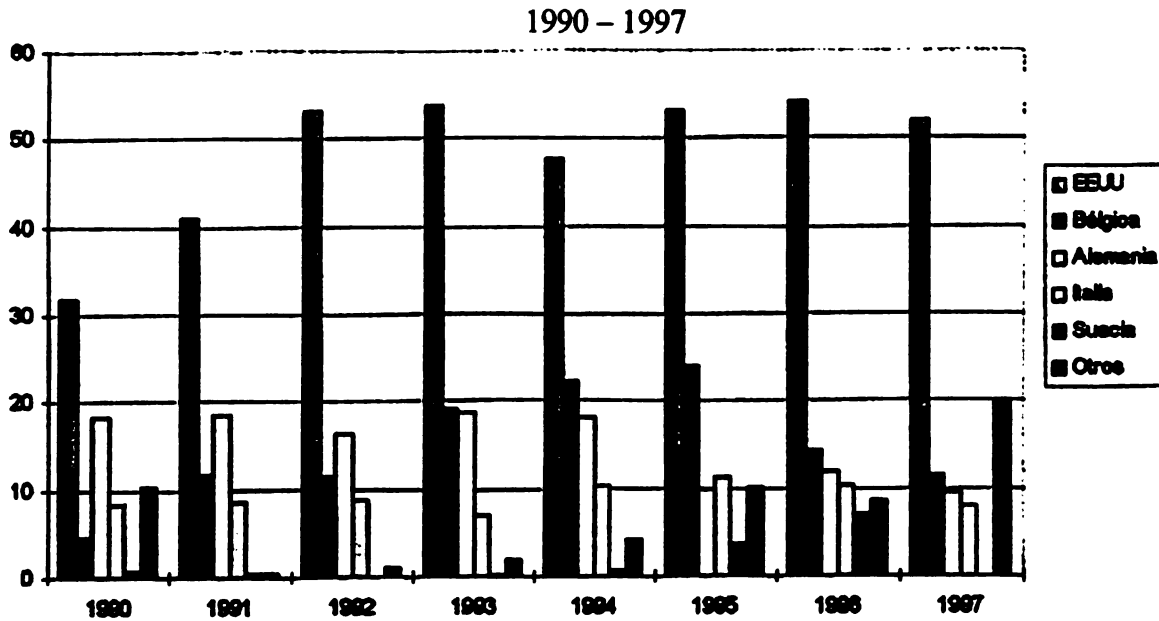


Source: Based on FAO and World Bank data, 1999

- Standart Fruit Company was the main banana exporting company for period 1988/90 – 1996/97, followed by Bandeco. In 1988, Standart and Bandeco exports totalled 21.8 and 22.7 million dollars respectively. In 1997 Standart surpassed Bandeco by 6.7 million dollars with its exports totalling 33.6 million dollars.
- Middle companies as well as independent producers export bananas. The main exporter varied for period 1992-1997. Exports by transnational companies exceed those by independent producers, except for 1994 and 1996 (see Table 1.5).
- The highest volume of banana exports from Costa Rica for period 1990 –1997 was in 1995 when trading began with 112.0 million boxes. The main destinations were the United States and the European Union with an average share of 50.1% and 48.0% respectively. In 1997, the U.S imported 52.1 million boxes (51.53%), the European Union 47.5 tonnes (47%) and remaining countries 0.51 million (0.51%).
- 1993 was the year of greatest exports to the U.S, totalling 53.9 million boxes. Costa Rica currently supplies 25% of the U.S market and 25.6% of the European market quota. (see Table 1.7)

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Figure 1.4: Costa Rica: Main destinations of banana exports.
In millions of boxes.



Source: Based on data from CORBANA, 1999

IV ORGANIZATION OF THE BANANA SUB-SECTOR

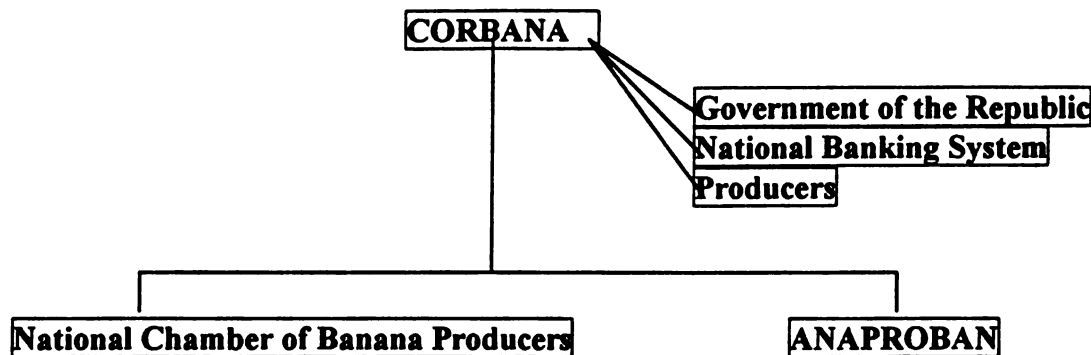
4.1. Organization

- CORBANA is at the first level⁸ of the organization
- The National Chamber of Banana Producers and the National Association of Banana Producers (ANAPROBAN) are at the second level.
- Community organizations make up the third level
- Producers constitute the fourth level (See figure 1.5.)

⁸ For the purpose of this study, leaders will be referred to as levels, whether they are sub-sectors or institutions

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Figure 1.5 Costa Rica: Organizational Chart of Institutions in the Banana Sector in Costa Rica



Source: Based on data from CORBANA, 1999

4.2. Administrative Aspects

- The organization of the banana industry in Costa Rica falls totally under CORBANA, including aspects related to policy formulation, trade negotiation, research, etc. Also, given the composition and nature of the corporation, it has legally been assigned a number of functions which allow it to act as an agency representing the sector. The other organizations have representation within CORBANA, thereby directly influencing decision-making.

4.3. Institutional Aspects

- A number of public and private institutions operate in the banana sub-sector. Public agencies include the Ministry of Agriculture and Livestock, Ministry of Foreign Trade (COMEX), the National Banking System⁹, City Councils¹⁰, State Universities and the Agricultural College for the Tropical Humid Region (EARTH).
- Private institutions include PROCOMER (Promotion of Foreign Trade), JAPDEVA (Port Administration Authority for the Atlantic Zone,) shipping companies, etc.

⁹ The National Banking System comprises state banks: the Central Bank of Costa Rica, the National Bank of Costa Rica, the Cartago Agricultural Credit Bank and the People's Bank. All private banks and financing institutions in the country also form part of the system.

¹⁰ The administrative and political division of Costa Rica is such that the country is divided into provinces and these in turn into districts. Each district has city councils which function as the administrative organization.



V. Private Organizations in the Banana Industry

5.1 CORBANA

INFORMATION SHEET

Establishment: November 16, 1971

Location: Zapote, San José

Telephone: 224-4111;758-1005

Fax: 253-9117

Internet: <http://www.corbana.com>

P.O. Box: 6504

Objectives:

- To increase research in banana cultivation
- To increase productivity in the banana sector.
- To reduce production costs
- To offer research services
- To facilitate equitable relationship between national producers and market enterprises
- To establish banana policies in conjunction with the government
- To centralize information on the activity

Funding: Voluntary contribution of five cents for each box exported

5.1.1 Background

- In 1971, the Government of the Republic, the banks in the National Banking System and banana producers joined forces to create an organization to support and promote the banana industry. The National Banana Association (ASBANA) was founded by Law 4895, on November 16, 1971.
- Since then, ASBANA acts as a spokesman for the producers in dealings between the vendors and the Government. ASBANA became an advisor on banana policy, the application of policies and the role of the administrator of plans for development of the banana industry increased productivity, restoration of areas and funds for refurbishing farms, contingencies and sectoral taxes (CORBANA, 1997)
- From 1980, ASBANA became institutionalized with greater organization and functions as the banana industry developed. Towards the end of the decade, the political environment with the thrust towards globalization and liberalization of the economy, there was pressure for a new organizational model to facilitate a separation of the institution from the public sector in order to be more effective.

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- Law No 7147, published and May 15, 1990 modernized ASBANA. Its new objectives included the promotion of production and marketing of banana among Costa Rican Companies. It then became the National Banana Corporation (CORBANA) (CORBANA, 1997)
- In the 70s and 80s, due to the growth in the banana industry and at the request of all its participants, CORBANA extended its operations to include farm management and the promotion of agricultural diversification (CORBANA, 1996)

5.1.2 Organization

- The General Assembly is at the highest level
- The second highest is the Executive Board followed by the Auditing Department
- The General Secretariat and Management Assistance is at the third level
- The Departments of Financial Planning, Information Technology, Legal Advisory Service and Foreign Consultants are at the fourth level (See Figure 1.5)

5.1.3 Organizational Development

- CORBANA has recently faced great national and international challenges. In a changing environment, there was an obvious need for internal restructuring with more capable professional staff to better deal with the new demands and functions of the corporation. The old structure consisted of a complex group of agencies which complicated the operations of the corporation.

5.1.4. Functions of CORBANA

- To advise the Government of the Republic on banana issues
- To finance the banana industry with its own resources and liaise with financial institutions.
- Technical support to the producers by providing services through laboratories, credit, technical assistance and information on process and markets.
- Research on banana cultivation so as to increase productivity.
- Regulation of relationship between national producers and trading companies.
- Design and regulation of banana policies.



- Creation of a centralized information system for the industry and the promotion of a system of ongoing and contemporary research.
- The search for the consolidation of an equitable regime of relationship between national producers and trading companies guaranteeing the just and rational participation of each sector. This activity will be coordinated with state institution to oversee compliance with legal and regulatory provisions.
- Participation in international forums on the banana industry to keep abreast of the international market and other important aspects.
- Recommendation of the minimum reference prices for buying and selling banana FOB. These guidelines shall be established by executive decree.
- Creation of new marketing channels favouring the interests of national products.
- Promotion of the participation of small and medium-size producers through organized groups or individually through the creation of programmes for the development of the banana industry.
- Direct participation in negotiations with the main banana buyers.
- Administration of banana export quotas to the European Union.

5.1.5 Structure

- **Assembly of Shareholders:** The maximum agency of the Corporation comprising shareholders (representing the capital of the Corporation) or its representatives and regulated by Chapter IV, Article 7 of the Constitutive Law of CORBANA and its Statutes.
- **Executive Board:** Comprises five members nominated for four year periods: a Director representing the Government of the Republic and deputizing for the President (Series A activity); two Directors representing the National Banking System designated by the Bank (Series B activity); two Directors designated by the General Assembly of banana producers (Series C activity) (CORBANA, 1996). The capital structure comprises equal parts for each component: Government, NBS and producers own 33.3% of shares.
- **Management:** The Manager is nominated by the Executive Board and shall have judicial and extra-judicial representation in the authority invested in him. He shall have the authority to confer powers, revoke them, substitute them and re-confer others. He is nominated for four-year periods (eligible for re-election). He may be designated a deputy manager. (CORBANA Law and its Reforms; 1996).



- **Auditor:** The Executive Board shall nominate an Auditor who shall be responsible for the monitoring of activities and agencies of the Corporation as well as companies with the laws, regulations and resolutions of the Board. This official shall have a fixed appointment except he is shown to be not performing, in which case a deputy auditor may be nominated.
- Each division is headed by a director and a group of collaborators.

5.1.6 Administrative Aspects

- The administrative structure of CORBANA is lineal. The upper echelons delegate authority according to their positions. The relationship between various levels is linear resulting from changes affecting institutions. There are five main aspects common to all divisions: Policies, Image, Environmental Protection, Technical Support and Development and Research.
- CORBANA is responsible for coordinating the involvement of all external institutions which impact on the development of the industry.

5.1.7 CORBANA Policies

5.1.7.1 Institutional Policy

- Reduction in the administrative apparatus with the objective of putting horizontal organizations in place, leading to the elimination of Deputy Managers, the establishment of an Accounting Division, reduction in the number of head offices and reorganization of existing ones.
- Incorporation of advanced technology into the work processes of the members of the Corporation.
- Reorientation of the Administration towards providing services to banana producers, particularly the Credit and Incentive Division, the Research Division and the Statistical Division which have already been assigned their respective functions within the current structure (CORBANA; 1996)

5.1.7.2 Banana Policy

- To reinforce the advisory role of the Government of the Republic in policies governing the banana industry.
- To broker international cooperation agreements.

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- To create a logistical information centre on the banana industry in conjunction with marketing agencies and producers.

5.1.7.3 Environmental Policy

- To establish programmes in environmental protection as a priority area for reinforcing attention in this regard.
- To create a department to oversee this aspect and implement adequate production systems.
- To designate resources and staff for the protection of the environment.
- To engage in research for improving this area.

5.1.8 Financing

- Law No.7147 provides for the maintenance and operational expenses of CORBANA as well as the acquisition of resources for this purpose through the voluntary contribution of US\$0.05 per box exported, to be paid in colons by producers at the going exchange rate. This contribution is tax free and shall be retained and handed over to CORBANA by purchasing or marketing companies in two fortnightly payments each month (CORBANA Law and its Reforms, 1996).
- There are various financing sources for producers. These include the Costa Rica Banking System (SBN) and the option of financing through CORBANA. The main lines of credit offered by the Corporation are: labour and investment capital, a rehabilitation fund and a special fund for the reactivation of banana production in the south and a contingency fund. Credit is currently directed principally to improving productivity and not to increasing production.
- Incentive programs administered by CORBANA include the return of part of the export tax to the producer. Those producers who satisfy a number of conditions established by law with respect to production and capital input are beneficiaries of this incentive. This program is in effect until 2004.
- The primary objective of these incentives is to reactivate those areas which are deemed to have potential for banana production, thereby increasing the exports volume of the country which had fallen in recent years. Approximately 135 banana projects are currently benefitting from this incentive plan (CORBANA, 1996)



5.1.9 Operational Aspects

Banana Policy and Statistical Division

This Division is responsible for the quantification of both national and international production which impact on the possibilities of acquiring markets and stability in participating markets. It analyses the industry in producing countries and are able to plan future targets for national production. This Division is critical to the organization of CORBANA since policy design and planning decisions are based on statistical information.

Human Resources Division

Attends to staff needs and is also responsible for the recruitment and selection of staff. In the first instance, the services of a doctor within the corporation are available, and there is a department responsible for labour conflicts, training courses and advisory services for staff.

Information Technology Division

Responsible for all aspects related to information technology and the maintenance of the network where many of the activities of the organization are coordinated.

Legal Advice

Gives managerial support to the Executive Board on legal, labour, judicial, civil and penal issues and advises on international issues related to trade negotiation and international forums.

Foreign Consultants

These offer external professional services to the Corporation which complement and make the work of the divisions at this level more efficient.

Financial Division

Responsible for accounting and the analysis of all information pertaining to income and expenditure, management of the payroll and administration of the investment portfolio. It is the function of this office to ensure that there is compliance with all legislation governing fiscal matters.



Research

Responsible for the administration of Research Laboratories with modern equipment. Research focuses on investigating new varieties of greater yield and the battle against plagues and diseases.

Auditor-General's Office

Supplies all materials and products that the corporation should have both at the administrative level and in direct relation to the producers. It negotiates purchases. By dint of its control in these areas, the Auditor General's office participates in the formulation of internal policies.

Credit and Incentives

Directly supports the Executive Board in its review of credit operations. Is responsible for carrying out the necessary financial studies prior to allocating credit to independent producers. Is responsible for regulating credit functions and also the refund of taxes from which producers are exempted in accordance with national policies. Also manages the 5 cents per box of banana exported which is used to finance CORBANA.

Agricultural Management

Coordinates the activities and tasks of the Research Centre. Is responsible for the rehabilitation of farms dedicated to production or the incorporation of other divisions; coordinates credit allocation following the evaluation of the agro-ecological conditions of lands and the supervision of active farms. Administers the Research Farms of the Corporation.



INFORMATION SHEET

Establishment: February, 1988

Location: Zapote, San José

Objectives: To defend independent banana producers

Functions:

- To strengthen the country's banana industry
- To increase the socio-economic stability of producers
- To intervene in internal conflict resolution within and outside of the organization
- To represent the negotiation of independent producers
- To seek better conditions for national producers within the national production structure
- To improve conditions in the marketing system and to seek new options where independent producers have a greater share

Organizational Structure:

- The General Assembly of Members is the maximum body of members. This Assembly has all the power and responsibilities provided for by the Costa Rican Associations Law.
- The Executive Board is at the second level of comprising a President, via President, Secretary treasurer, an attorney and general and twelve legal advisors.
- Immediately following is the General Directorate which is the administrative body of the institution. Professional and specialists participate in areas of interest. At the next level of the organizational structure are the Committees which are responsible for attending to matters of immediate importance. Some of the more important commissions are:

Control and Evaluation of Costs Commission, Information Commission and the Commission for Price Control (FOB)

Telephone: 2241130

Fax: 253-6027

E-mail: Unavailable

Financing: Export production by quota for each member producer



5.3. National Chamber of Banana Producers

INFORMATION SHEET

Establishment: 1989

Location: San José

Objectives: To be a forum for the discussion of banana issues affecting the subsector

Telephone: 222-7891

Fax: 2230678

E-mail: canaba@sol.racsa.co.cr

Functions:

- To work toward the organization and development of agriculture, the banana industry and trade.
- To promote good relations between producers and the local companies which purchase the banana fruit.
- To assist in the prevention and eradication of banana diseases.
- To promote statistical studies on production, costs and other factors affecting the banana economy.
- To study the standard of living of workers and banana activities and recommend as necessary, ways of improvement including health and other facilities which may contribute to the well-being of the workers and their families.
- To defend and protect the overall interests of members with the aim of converting the banana industry into a vital and solid force of the national economy and to this end, take any initiative necessary to strengthen and protect the industry.
- To ensure that the laws, decrees and regulations passed do not prejudice the development of the banana industry.
- To intervene, at the request of members, in all those matters which directly affect them or the banana industry in particular, acting as the friendly intermediary between members or between members and institutions or officials.

Financing: The Chamber is financed by a quota paid by each member per box exported. The recently adjusted quota is \$0.0023 per box exported

5.3.1 Administration

- The administration process in the National Chamber of Banana Producers is a simple one where the administrative body of the organization is responsible for effecting legal and representative management. Reports are prepared on activities and main issues affecting both the banana subsector and the organization itself.

- Transnational Companies are strong in the decision-making process since, given the structure of the organization where each producing farm has a vote, they have the possibility of tilting the balance in their favour.

5.3.2 Organization

- The General Assembly is at the first level.
- The Board of Directors is at the second level and is elected by the General Assembly.
- The Executive Board is at the third level.
- The Commissions responsible for specified areas are at the fourth level.
- The producers are at the bottom level.

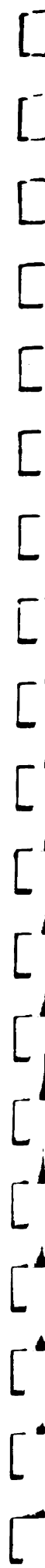
5.3.3 Structure

- The General Assembly comprises all members, Marketing Agencies such as COBAL, Standart Fruit Company, BANDECO, BANACOL and some other independent producers. As was said previously, each farm has one vote. Therefore, each trading company which also owns several farms, is able to vote en bloc.
- The Executive Board comprises the Executive Director, a secretary and administrative assistance.
- The Commissions comprise members of the Chamber who are interested in fulfilling their commitments.

VI SUPPORT INSTITUTIONS

6.1 National Banking System

- Occupies a post within the Board of Directors of CORBANA. Consideration should be given to the fact that the banana industry is one of the main foreign exchange earners. The National Banking System enjoys a special system of guarantee and bonds for the subsector.



6.2 Ministry of Agriculture and Livestock

INFORMATION SHEET

Location: San José

Telephone: 231-2344

Fax: 232-19x9

E-mail: dzuniga@mag.go.cr

Web page: www.mag.go.cr

Financing: National Budget of the Republic

(assigned annually based on government policies at the time. In 1977 it was 27.4 million dollars).

6.3 Academic Institution

University of Costa Rica (UCR)

INFORMATION SHEET

Establishment: 1942

Location: San Pedro de Montes de Oca¹¹ (main campus)

Telephone: 207-4000

E-mail: unicon@racsa.ac.cr

Functions: The University of Costa Rica from its main campus in the Atlantic Zone, coordinates and executes a number of research projects in association with CORBANA.

Objectives: To carry out research, teaching and social service at different academic and research centres.

Financing: National Budget of the Republic; also receives income for services.

6.4. Other Institutions

6.4.1 JAPDEVA

- JAPDEVA is responsible for the administration of ports in the Atlantic zone of the country from which some 97% of national banana exports leave (CORBANA 1977).

¹¹ District in the Province of San José

6.4.2 Trade Promotion (PROCOMER)

- PROCOMER is responsible for promoting the image of the country as a top quality international producer. It also generates market information and carries out other promotional activities.

6.4.3 Transnational Companies

- These exercise control over the banana world trade and therefore have a direct influence on the national banana industry. They are also income generating for those areas where there is production development and new technologies which offer improved quality and conditions in terms of both production and the environment.

6.4.4 Private Sector Companies in the Agricultural Sector in Costa Rica

- Organizations of the banana subsector fall under the Union of Private Sector Companies in Costa Rica (UCCAEP) and other organizations representing the interest of the private sector and the agricultural sector in Costa Rica which groups all the organizations with similar interests.

6.4.5. Shipping Companies

- Shipping companies are responsible for transportation by sea. Despite the fact that transnational companies have their own ports, they transport a considerable part of the banana exports through this medium.

6.4.6 City Councils

These coordinate social actions and infrastructure with the banana companies on behalf of the communities.

VII INTERRELATIONSHIP BETWEEN THE VARIOUS ACTORS IN THE BANANA INDUSTRY

7.1. Policy Design

- Policy design for banana production is a complex process where there is intervention by groups of the subsector and others from the public and private sectors who are involved with the subsector.
- CORBANA is the backbone of the process and formulates policies for the industry. Statistical information is the main criterion for the decision making process and reflect the national and international situation of the industry.

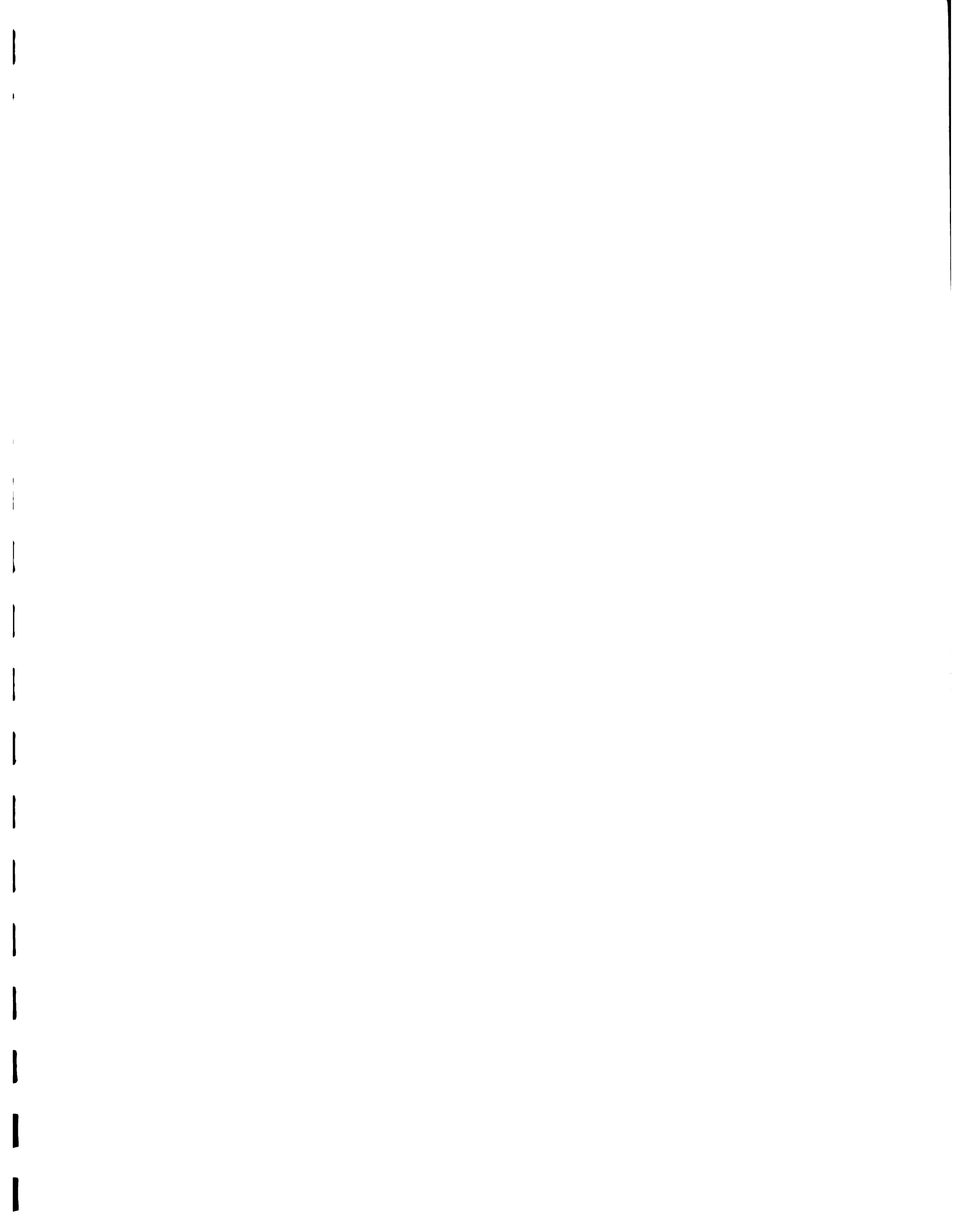
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- Other institutions such as COMEX participate in marketing, international pricing, etc; the National Banking System in matters of financing and MAG in technical and production aspects. CORBANA acts as an intermediary, giving technical support I in areas such as international pricing, international production, etc.
- The formulation of policies must go through ANAPROBAN and the National Association of Banana Producers who would determine the criteria for approval. Any law established by CORBANA is proposed to both organizations for their opinion. A direct relationship is established for policy design. Both ANAPROBAN and the Chamber has the authority to propose changes and matters of benefit to the industry.
- The main contribution of ANAPROBAN to policy design is based on the following areas of interest.
 - a) The dollarization of banana industry debts.
 - b) The decisions of the national bank with regard to macroeconomic and credit issues.
 - c) Fulfillment of the commitments of the Banana Framework Agreement.
 - d) Agreements with the city councils in banana areas.

7.2. Other Relationships

- The National Association of Banana Producers provides feedback from the other organizations involved in the banana industry. It is involved with activities which complement and where necessary collaborates with the active members of the organization.
- It has relations with the National Banking System, given the considerable amount of credit available to the banana industry. The Association manages some terms of reference for credit possibilities available within the legal framework established by the state. It also coordinates activity with other public institutions such as COMET in international matters and MAG in production and health issues. It also actively participates within the various pressure groups comprising the Costa Rican Agricultural Sector in the defence of their rights.
- ANAPROBAN has active interrelationships both with other institutions which deal with the subsector and belong to the Agricultural Sector.
- Within the banana subsector it relates directly with CORBANA and the National Association of Banana Producers who are active members of the Board of Directors of CORBANA and members of ANAPROBAN. This association also leads to direct benefits from the activities of the Corporation. There is also exchange of information with the Association of Banana Producers.

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VIII APPENDIX I

Table 1.1.: Costa Rica: Gross Domestic Product (GDP), Agricultural Gross Domestic Product (AGDP) and Banana Industry Participation. In millions of colones. 1990-1997

| Year | Production | GDP | % Banana | AGDP | % Banana |
|------|------------|----------|----------|---------|----------|
| 1990 | 547.9 | 12,224.5 | 4.48 | 2,366.0 | 23.16 |
| 1991 | 589.8 | 12,521.1 | 4.71 | 2,513.1 | 23.47 |
| 1992 | 667.6 | 13,489.0 | 4.95 | 2,614.3 | 25.54 |
| 1993 | 739.3 | 14,344.0 | 5.15 | 2,676.4 | 27.62 |
| 1994 | 754.9 | 14,986.9 | 5.04 | 2,757.0 | 27.38 |
| 1995 | 819.9 | 15,360.6 | 5.34 | 2,869.5 | 28.57 |
| 1996 | 776.5 | 15,238.0 | 5.10 | 2,851.2 | 27.23 |
| 1997 | 734.6 | 15,730.3 | 4.67 | 2,835.0 | 25.91 |
| RE/1 | 4.0 | 3.6 | | 2.6 | |

Source: Based on Central Bank data, 1999.
I/RE: Exchange Rate

Table 1.2.: Costa Rica: Work Force Dedicated to Banana Cultivation and Direct Employment.

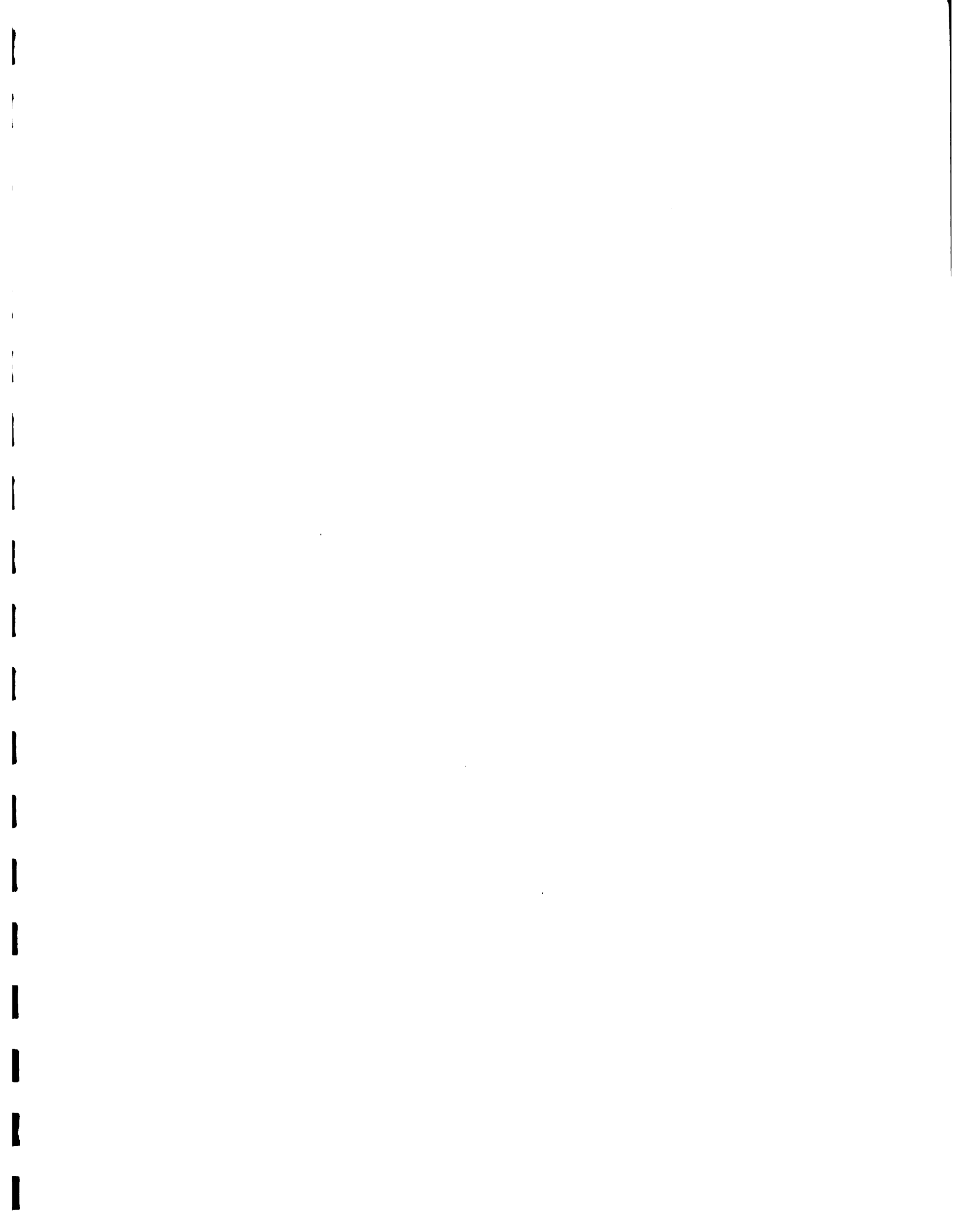
| Year | Agriculture | Banana | % |
|------|-------------|--------|------|
| 1990 | 270,400 | 18,845 | 7.0 |
| 1991 | 264,800 | 22,378 | 8.5 |
| 1992 | 259,000 | 25,540 | 9.9 |
| 1993 | 256,800 | 33,094 | 12.9 |
| 1994 | 252,300 | 35,334 | 14.0 |
| 1995 | 261,000 | 34,951 | 13.4 |
| 1996 | 259,100 | 32,958 | 12.7 |
| 1997 | 263,400 | 32,958 | 12.5 |

Source: Based on SEPSA data, 1999.

Table 1.3.: Costa Rica: Central Government Income (total for the banana industry). In millions of colones. 1992-1998

| Year | Banana | Total | % |
|--------|--------|---------|------|
| 1992 | 4,543 | 142,670 | 3.18 |
| 1993 | 3,260 | 166,065 | 1.96 |
| 1994 | 2,851 | 191,247 | 1.49 |
| 1995 | 4,546 | 253,699 | 1.79 |
| 1996 | 3,110 | 302,496 | 1.03 |
| 1997 | 2,663 | 363,540 | 0.73 |
| 1998/1 | 1,750 | 280,073 | 0.62 |

Source: Based on Central Bank of Costa Rica data, 1999.
/ August figures



- The main marketing system is by contract. Local businessmen send their product to foreign companies for them to transport and market them. The participation of national producers is limited to selling the product on some local wharf and from that point the transnationals assume all the risks and thereby the benefits of international trade (Chaves L. and Formoso R; 1995). There have been several movements of local producers which have impacted on direct sales systems.

7.3. MARKETING

- A tax of one dollar per box exported is established by law for those districts which form the base of banana production (See Table 1.3 and 1.8).
- With respect to tax contributions, it is established by law that marketing companies must withhold and pay to CORBANA \$0.02 per box exported towards a special fund which provides credit to banana producing zones which enjoy trust fund guarantee for members or associates with the understanding that the resources will be recovered.

7.3 FINANCIAL ASPECTS

- There is active participation with UCCAFP and the Ministry of Agriculture which act as pressure groups on behalf of the sector. It also relates to the Board of Administrators for the Development of the Atlantic Zone (JAPDEVA). It has links also with companies from other banana producing countries through information exchange and technical support.
- There is involvement with the private sector given the economic importance of the activity. The association takes an interest in the decisions taken for the sector by the Ministry of Agriculture and Livestock, the Office of the President and the Ministry of Foreign Trade (COMEX).

Table 1.4.: Costa Rica: Volume, Price and Income for Banana Exports.
In thousands of boxes of 18.14 kg and dollars.
1991-1997

| Year | Banana Exports | Volume | Price | Total Exports | % |
|------|----------------|---------|-------|---------------|-------|
| 1991 | 396.6 | 1.538.4 | 257.8 | 1.896.5 | 20.91 |
| 1992 | 522.1 | 1.657.2 | 315.0 | 2.531.6 | 20.62 |
| 1993 | 560.1 | 1.833.7 | 305.5 | 2.624.6 | 21.34 |
| 1994 | 561.0 | 1.874.6 | 299.3 | 2.869.4 | 19.55 |
| 1995 | 683.8 | 2.033.3 | 336.6 | 3.453.0 | 19.80 |
| 1996 | 611.3 | 1.933.3 | 316.2 | 2.730.2 | 22.39 |
| 1997 | 587.1 | 1.853.3 | 319.9 | 4.267.6 | 13.76 |

Source: Based on Central Bank of Costa Rica data, 1998.

1/ Preliminary figures

Table 1.5.: Composition of Exportable Production.
In thousands of boxes of 18.14 kg.
1992-1997

| Year | Transnational Companies | % | Independent Producers | % | Total |
|------|-------------------------|------|-----------------------|------|---------|
| 1992 | 50.075 | 54.8 | 41.282 | 45.2 | 91.357 |
| 1993 | 52.523 | 52.0 | 48.450 | 47.9 | 101.063 |
| 1994 | 51.141 | 49.6 | 52.200 | 50.6 | 103.200 |
| 1995 | 56.635 | 50.5 | 55.454 | 49.5 | 112.089 |
| 1996 | 50.596 | 47.5 | 55.982 | 52.5 | 106.579 |
| 1997 | 53.061 | 52.4 | 48.112 | 47.6 | 101.173 |

Table 1.6.: Costa Rica: Area under Banana Production in hectares.
1990-1996

| Year | Hectares |
|------|----------|
| 1990 | 28.296 |
| 1991 | 33.400 |
| 1992 | 38.119 |
| 1993 | 49.394 |
| 1994 | 52.737 |
| 1995 | 52.166 |
| 1996 | 49.191 |

Source: Based on data from CORBANA, 1999.



Table 1.7.: Costa Rica: Destination of Exports by Market and Countries

| Year | United States | Belgium | Germany | Italy | Sweden | Others | Total |
|-------------|----------------------|----------------|----------------|--------------|---------------|---------------|--------------|
| 1990 | 31.77 | 4.72 | 18.37 | 8.34 | 0.56 | 10.36 | 74.13 |
| 1991 | 41.08 | 11.73 | 18.56 | 8.56 | 0.45 | 0.46 | 80.85 |
| 1992 | 53.22 | 11.57 | 16.39 | 8.92 | 0.95 | 1.15 | 91.36 |
| 1993 | 53.92 | 19.19 | 18.86 | 7.03 | 0.14 | 1.93 | 101.06 |
| 1994 | 47.62 | 22.34 | 18.04 | 10.37 | 0.70 | 4.28 | 103.34 |
| 1995 | 53.13 | 24.11 | 9.87 | 11.24 | 3.67 | 10.07 | 112.09 |
| 1996 | 54.29 | 14.34 | 11.94 | 10.45 | 7.06 | 8.50 | 106.58 |
| 1997 | 52.13 | 11.50 | 9.41 | 7.90 | 0.11 | 20.13 | 101.17 |

Source: Based on data from CORBANA, 1999.

Table 1.8.: Costa Rica: Collection of Banana Tax.
Value in thousands of dollars.
1990-1997

| Year | Taxes | | | | | Value Added |
|-------------|---------------|---------------------|-------------------|-------------------|-------------------|--------------------|
| | Export | \$0,02/bunch | \$0,02/box | \$0,04/box | \$0,06/box | |
| 1990 | 22.451 | 1.149 | | | | 3.158 |
| 1991 | 40.427 | 1.317 | | | | 4.004 |
| 1992 | 45.678 | 1.518 | | | | 4.764 |
| 1993 | 50.531 | 1.791 | 2.021 | | | 5.094 |
| 1994 | 38.054 | | | 4.133 | | 4.229 |
| 1995 | 44.333 | | | | 6.725 | 6.493 |
| 1996 | 30.341 | | | | 6.394 | 5.810 |
| 1997 | 22.258 | | | | 6.070 | 5.514 |

Source: CORBANA 1997.

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International Banana Trade

Table 1.9.: Main Banana Exporting Countries.
In millions of tonnes.
1994-1997

| | 1994 | 1995 | 1996 | 1997 |
|--------------|------|------|------|------|
| Ecuador | 3.31 | 3.74 | 3.84 | 4.55 |
| Costa Rica | 1.88 | 2.03 | 1.93 | 1.94 |
| Colombia | 1.57 | 1.34 | 1.41 | 1.49 |
| Philippines | 1.16 | 1.21 | 1.25 | 1.26 |
| Guatemala | 0.54 | 0.65 | 0.61 | 0.63 |
| Panama | 0.71 | 0.71 | 0.64 | 0.58 |
| Honduras | 0.49 | 0.52 | 0.57 | 0.57 |
| Marble Coast | 0.16 | 0.17 | 0.20 | 0.23 |
| Cameroon | 0.18 | 0.17 | 0.17 | 0.18 |
| FWI | 0.23 | 0.19 | 0.19 | 0.14 |
| Mexico | 0.05 | 0.11 | 0.13 | 0.13 |
| Jamaica | 0.08 | 0.09 | 0.09 | 0.10 |

Source: based on data from FAO and World Bank, 1999.

FWI refers to a group of islands known as "Former Windward Islands" (Dominica, Grenada, St. Lucia, St. Vincent and the Grenadines).

Table 1.10.: Main Banana Importers.

| | 1994 | 1995 | 1996 | 1997 |
|-----------------|------|------|------|------|
| European Union | 3.18 | 3.11 | 3.16 | 3.41 |
| EEUU | 3.20 | 3.27 | 3.37 | 3.30 |
| Japan | 0.87 | 0.87 | 0.82 | 0.88 |
| China | 0.05 | 0.16 | 0.51 | 0.61 |
| Russia | 0.26 | 0.73 | 0.43 | 0.60 |
| Canada | 0.38 | 0.40 | 0.41 | 0.42 |
| Poland | 0.17 | 0.23 | 0.24 | 0.26 |
| Argentina | 0.20 | 0.20 | 0.25 | 0.26 |
| Czech. Republic | 0.11 | 0.16 | 0.15 | 0.16 |
| Chile | 0.12 | 0.15 | 0.15 | 0.16 |
| South Korea | 0.14 | 0.12 | 0.12 | 0.12 |
| Turkey | 0.07 | 0.09 | 0.10 | 0.10 |

Source: Based on data from FAO and the World Bank, 1999.



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Terms of Reference for a Study on the Management, Institutional and Operational Aspects of the Coffee, Bananas, Sugar and Beef Sub-Sectors in Costa Rica.

Background

Last November, the Minister of Agriculture in Jamaica, the Honourable Roger Clarke attended the Executive Meeting of IICA Costa Rica. During his visit to the country, he took the opportunity to visit several areas in Costa Rica, mainly to look at farms and institutional aspects of the banana, coffee, sugar and beef sub-sectors. His primary interests were to observe and learn about the situation and condition of farms, management and operations of farms, the organization of producers, the role of the public sector in these sub-sectors, the organization of producers and the relationship between producer organizations and the public sector.

The Minister's interests in these sub-sectors are largely because banana, sugar, coffee and beef are also major sub-sectors in Jamaica's agriculture and make substantial contribution to the Jamaican economy. Information on the management and institutional aspects of these sub-sectors in Costa Rica could assist in strengthening and improving their performance in Jamaica. By visiting these sub-sectors in Costa Rica, the Jamaica's Minister of Agriculture was able to learn of their success. However, he needs additional information on the situation of these sub-sectors in Costa Rica that would be useful in helping him to address many organizational, management and operational issues in Jamaica.

Specific Purpose and Objectives

The specific purpose of the consultancy is to conduct a study on the organizational, management and operational aspects of the banana, coffee, sugar and beef sub-sectors in Costa Rica. The specific objectives of the study are to:

1. Provide an overview of the organization and structure of the sub-sectors.

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2. Provide a brief review of the evolution of the organizational and structural aspects of the sub-sectors in the last decade.
3. Discuss the management, institutional and operational aspects of the sub-sectors.
4. Discuss the roles, functions and the relationships of the various institutions/organizations involved in these sub-sectors – the public sector (the Government and other public institutions and Corporations), producer organizations, farmers, other private sector institutions, processors and marketing organizations, etc. The discussion should also include aspects related to policy formulation and execution, management, operations and financing.

FECHA DE DEVOLUCION

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IICA
E10-1207

Autor

The banana sector of C.R.:

Título production, organizational
and inst. aspects of the ...

Fecha
Devolución

Nombre del solicitante





