

Achievements of Traditional Crops for 2014

1.0 Purpose

The matter for tabling is the achievements of traditional crops for 2014.

2.0 Background

Traditional Export Crops

Gross output for Traditional Export Crops increased by 30.5 per cent (see Table 1). The increase in output was attributed to improved output for the crops Banana, Sugar Cane and Cocoa. Banana and Sugar Cane combined accounted for over 80 per cent of the value of the Traditional Export Crops sub-industry. Earnings from Traditional Export Crops were US\$17.0 million compared with US\$22.1 million in 2013. The decline in the value of exports was due mainly to reduced earnings from Coffee (down 17.4 per cent to US\$13.5 million), Pimento (down 69.7 per cent to US\$0.6 million) and citrus (down 47.9 per cent to US\$1.7 million). However, the value of Cocoa exports improved by 104.0 per cent to US\$1.0 million and Banana by 188.7 per cent to US\$0.2 million (see Table 2).

Table 1

**AGRICULTURE PRODUCTION INDEX (r)
2007=100**

SUB-INDUSTRIES

YEAR	TRADITIONAL EXPORT CROPS	OTHER AGRICULTURAL CROPS	ANIMAL FARMING	FISHING	POST HARVEST ACTIVITIES	TOTAL
2007	100.0	100.0	100.0	100.0	100.0	100.0
2008	79.3	94.8	103.2	93.1	111.6	93.7
2009	89.6	112.7	100.5	92.6	101.3	106.2
2010	98.2	113.8	99.0	101.1	70.2	106.6
2011	99.2	134.4	98.1	98.0	60.1	117.6
2012	100.9	139.1	102.9	71.4	68.3	119.8
2013	82.9	141.2	101.8	96.8	65.4	119.1
2014	108.1	130.5	106.3	96.1	49.0	117.9
% Change 2014/2013	30.5	-7.6	4.4	-0.7	-25.0	-1.0

r - revised

Discrepancies in table due to rounding

Source: Planning Institute of Jamaica

Table 2**VALUE OF AGRICULTURAL EXPORTS, 2010 - 2014
(US\$' 000)**

	2010 ^r	2011	2012	2013	2014 ^p	% Change 2014/2013
Traditional Export Crops						
Bananas	1	63	120	62	179	188.7
Citrus (Fresh Fruit)	1 831	2 180	1 883	3 322	1 742	-47.9
Coffee	19 191	18 326	13 778	16 327	13 479	-17.4
Cocoa	1 021	1 108	1 936	504	1 028	104.0
Pimento	2 866	1 835	2 303	1 912	579	-69.7
TOTAL	24 910	23 512	20 020	22 127	16 997	-23.2

p - preliminary

Source: Statistical Institute of Jamaica

3.0 Performance of traditional crops

3.1 Sugar Cane

For the 2013/2014 crop year (November 2013-October 2014), 1 779 258 tonnes of sugar cane were milled which produced 148 271 tonnes of sugar (Table 3). This compared with the previous crop year when 1 402 564 tonnes of sugar cane were milled, which yielded 122 835 tonnes of sugar. The increase in the volume of sugar cane milled was made possible by the programmes: Sugar Cane Replanting Loan Programme; and the Cane Expansion Programme, which facilitated the replanting and expansion of sugar cane. As a result, sugar cane supply increased by 26.9 per cent. Sugar cane supplied by the Private Farms¹ increased by 35.2 per cent to 775 309 tonnes while sugar cane supplied by Estates increased by 21.0 per cent to 1 003 949 tonnes (see Table 3).

¹ Sugar cane is supplied to the factories from two sources, namely, Private Farms and the Estates operated by the factories.

There was a deterioration in the quality of sugar cane produced. This was reflected in the tc:ts ratio² (the amount of sugar cane used to produce one tonne of sugar) which moved to 11.53 tonnes from 10.94 tonnes in the previous crop year. This was linked to adverse weather conditions and mechanical problems at some of the sugar factories.

For the 2013/14 crop year, the ex-factory price for sugar was \$80 020 per tonne, moving from \$75 594 in the previous crop year (Table 6). The proportionate allocation of the ex-factory price between sugar cane growers and manufacturers was maintained at a ratio of 62:38.

The volume of sugar exported for calendar year 2014 was 88 509 tonnes valued at US\$65.3 million compared with 82 469 tonnes in 2013 valued at US\$71.2 million (Table 4). The decline in earnings from exports reflected a downward movement in the price of sugar obtained on the export market. The majority of the sugar was exported to the European Union (77 457 tonnes), while 11 016 tonnes was exported to the USA and 36 tonnes to other destinations.

² tonnes cane:tonnes sugar

Table 3**PRODUCTION STATISTICS: SUGAR CANE AND DERIVATIVES, 2010 - 2014**

PARTICULARS	UNIT OF MEASURE	2010	2011	2012	2013	2014
		Cane Milled (Crop Year)				
Total	'000 tonnes	1 390.1	1 518.3	1 475.2	1 402.6	1 779.3
Farmers		572.1	613.0	561.6	573.4	775.3
Estates		817.9	905.3	913.6	829.2	1 003.9
Sugar Production (Commercial)						
Calendar Year	'000 tonnes	116.5	137.8	130.7	120.4	143.2
Crop Year	'000 tonnes	117.2	134.3	126.4	122.8	148.3
Acreages Reaped (Industry)	'000 hectares	27.6	27.9	28.1	29.2	29.7
Farmers		10.9	10.6	10.9	12.6	13.1
Estates		16.7	17.3	17.1	16.6	16.6
Tonnes Cane Per Hectare						
Industry		50.3	54.4	52.6	48.0	59.9
Farmers		52.6	57.8	51.3	45.6	59.2
Estates		48.9	52.4	53.4	49.9	60.4
Tonnes Cane Per Commercial Sugar		11.86	11.31	11.21	11.42	12.00
Tonnes Cane Per 96 Sugar		11.41	10.88	11.21	10.94	11.53
Tonnes Sugar Per Hectare		4.41	5.01	4.69	4.39	5.20
Molasses						
Production	'000 tonnes	57 814	59 951	57 166	54 878	71 746
Export	'000 litres	0.0	0.0	0.0	0.0	0.0
Value	US\$'000	0.0	0.0	0.0	0.0	0.0

Source: Sugar Industry Authority

Table 4**SUGAR EXPORTS BY DESTINATION, 2010 - 2014**

DESTINATION	2010		2011		2012		2013		2014	
	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000	Quantity (tonnes)	Value (fob) US\$'000
EUROPEAN UNION	78 639	36.5	94 440	51.1	103 118	95.3	82 405	71 086	77 457	59 406
USA	13 980	9.1	16 283	13.2	0	0	0	0	11 016	5 883
OTHER	280	0.2	27	0.03	36	0.04	64	78	36	51
TOTAL	92 899	45.8	110 750	64.3	103 154	95.3	82 469	71 164	88 509	65 340

Source: Sugar Industry Authority

3.2 Bananas³

Banana production during 2014 was estimated at 51 581 tonnes compared with 37 211 tonnes in 2013 (Table 5). Production was the highest in four years. The overall improvement in output was due primarily to increased yields in the first half of 2014 which outweighed a decline in the second half of the year, as the banana industry continued to recover from the impact of Hurricane Sandy. Farmers were assisted with inputs to aid the recovery process. However, drought conditions during the second half of the year led to a decline in yields for that period. During July 2014, the main banana growing parishes of St. Mary, St. Thomas and Portland recorded rainfall levels of 1.0 per cent, 10 per cent and 23 per cent of the 30 year mean, respectively. In 2014, a total of 199.2 tonnes of the fruit valued at US\$179 217 was exported compared with 76.6 tonnes valued at US\$61 703 in 2013.

3.3 Coffee

The volume of coffee berries delivered to processing plants during the 2013/14 crop year (August 2013 – July 2014) declined by 24.1 per cent to 5 298 tonnes compared with the previous crop year (see Table 5). This represented the lowest national production since the 1988/89 crop year when the industry was severely affected by Hurricane Gilbert. The decline in production was linked to:

- the Coffee Leaf Rust Disease⁴ which reduced the productive capacity of coffee plants
- a sustained reduction in demand and lower market prices.

Deliveries of Blue Mountain cherry coffee declined by 24.2 per cent to 4 425 tonnes, while Non-Blue Mountain cherry coffee went down by 23.8 per cent to 873 tonnes (see Table 5). The weighted average farmgate price paid for Blue Mountain cherry coffee and Non-Blue Mountain cherry coffee was \$183 717 per tonne and \$95 533 per tonne, respectively (Table 6). The value of coffee exported during 2014 was US\$13.5 million compared with US\$16.3 million in 2013.

³ Based on national accounting conventions stipulated by the Statistical Institute of Jamaica, banana production for both export and domestic consumption is captured in the Traditional Export Crop category.

⁴ The Coffee Leaf Rust Disease infected approximately 35 per cent of over 2000 acres.

3.4 Citrus

For the 2013/14 crop year (July 2013-June 2014), overall citrus production was estimated at 71 194 tonnes, reflecting a decline of 15.0 per cent (see Table 5). The Citrus Greening Disease continued in 2014 to be the main reason for the decline in this sub-industry. Infected trees produced predominantly green fruits which failed to ripen. The Citrus Greening Disease in the industry led to a decline of all citrus crops in Jamaica.

Table 5

PRODUCTION OF SELECTED TRADITIONAL EXPORT CROPS, 2010 - 2014								
PARTICULARS	CROP-YEAR	UNIT	2010	2011	2012	2013	2014	% Change 2014/2013
1. Bananas	January - December	Tonnes	53 649	46 660	47 473	37 211	51 581	38.6
2. Citrus								
Estimated Total Production	July - June	Tonnes	117 440	106 922	97 072	83 758	71 194	-15.0
Sweet Orange			108 376	100 093	91 657	79 178	67 302	-15.0
Grapefruit			1 421	800	571	614	522	-15.0
Ortanique			5 819	4 661	3 960	3 426	2 912	-15.0
Ugll			1 824	1 368	884	540	459	-15.0
3. Coffee (Cherry)	August - July							
Estimated Total Production		Tonnes	9 121	8 099	6 687	6 984	5 298	-24.1
Blue Mountain			7 535	6 574	5 576	5 839	4 425	-24.2
Non-Blue Mountain			1 586	1 543	1 111	1 146	873	-23.8
4. Cocoa	October - September							
a) Deliveries to Processing Plants		Tonnes	1 368	499	1 393	997	1 154	15.7
b) Out-turn from Processing Plants		Tonnes	545	200	557	399	462	15.8
5. Coconut	January - December	Millions	95.3	95.6	96.4	97.4	98.5	1.1

Source: Commodity Boards

3.5 Coconut

Coconut production in 2014 was estimated at 98.5 million compared with 97.4 million in 2013 (see Table 5). The improvement in output was due to the continued effort of the Coconut Industry Board (CIB) in implementing planting and disease eradication measures to ensure the sustainability and expansion of the industry.

The CIB continued to make positive steps towards developing a variety of coconut which will be resistant to the Lethal Yellowing disease. During 2014, a total of 5 530 trees were lost to the disease compared with approximately 4 623 trees in 2013 and 10 062 trees in 2012. The CIB continued to build on the success of the *Sustainable Coconut Production through Control of*

Coconut Lethal Yellowing project by removing and burning all lethal yellowing infected coconut trees as a means of controlling the spread of the disease and replaced, where possible, with healthy coconut seedlings. In 2014, the Board distributed 39 228 coconut seedlings to farmers compared with 112 521 in 2013.

Although the coconut industry continued to be negatively impacted by the Lethal Yellowing Disease, knowledge gained from the *Sustainable Coconut Production through Control of Coconut Lethal Yellowing project* continued to be beneficial to the curtailment of the disease.

The project, which began in 2007 and ended in 2012, was designed to strengthen the research and development capacity of countries affected by the Coconut Lethal Yellowing disease in the Caribbean and Central America, so as to prevent the destruction of the coconut industry due to disease. A network comprising 14 institutions in 11 countries and a lethal yellowing related website were established, as well as improved collaboration among research institutions.

Table 6

FARMGATE PRICES OF SELECTED TRADITIONAL EXPORT CROPS, 2010 - 2014

PARTICULARS	UNIT	2010 ^r	2011	2012	2013	% Change	
						2014p	2014/2013
1. Sugar	J\$/Tonne	40 641	47 925	75 594	75 594	80 020	5.9
2. Bananas Price to Growers	J\$/Tonne	44 000	44 000	55 115	55 115	55 115	0.0
3. Citrus							
Oranges	J\$/Tonne(Solids)	121 000	168 000	212 800	209 000	246 400	17.9
Ortaniques	J\$/Tonne(Solids)	121 000	168 000	212 800	209 000	246 400	17.9
Grapefruits	J\$/box	185	185	220	380	420	10.5
4. Coffee							
Price to Growers							
- Blue Mountain	J\$/Tonne	117 211	113 677	121 253	128 602	183 717	42.9
- Non-Blue Mountain	J\$/Tonne	67 975	69 673	73 487	91 858	95 533	4.0
5. Cocoa	J\$/Tonne	146 006	162 000	200 000	200 000	200 000	0.0
6. Pimento	J\$/Tonne	187 390	253 000	253 000	264 000	418 875	50.0
7. Coconut Seeds	J\$/Seed	35	50	50	50	50	0.0

p - preliminary

Source: Based on data supplied by Commodity Boards and the Ministry of Agriculture & Fisheries

3.6 Cocoa

The volume of wet cocoa beans delivered to fermentaries for the 2013/14 crop year (October 2013–September 2014) amounted to 1 154.0 tonnes compared with 997 tonnes in the previous crop year (see Table 5). The improvement in output may be attributed to the significant rehabilitation and replanting programme following the impact of Hurricane Sandy. In addition, measures to strengthen extension services and improve operational efficiencies were implemented. Further improvements in cocoa production were, however, stymied by drought conditions during the crop year.

The Farmgate price paid to farmers was \$200 000 per tonne (see Table 6). The value of exports for the calendar year 2014 was US\$1.0 million compared with US\$0.5 million in 2013 (see Table 2).



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