

## Ministry of Agriculture

### Data Bank & Evaluation Division

### Quarterly Report on Crop Production

#### Fourth Quarter (October to December) 2008

In a year that has seen successive declines or minimal growth in overall crop production for the first three quarters, the Ministry of Agriculture is reporting that through the resilience of farmers, supported by the efforts of the Ministry, the fourth quarter recorded a 14.4 % increase in production of Domestic Crops as compared to the similar quarter of 2007. Overall, the Agriculture sector, based on preliminary estimates, is showing an 8.0 % increase for the 4<sup>th</sup> Quarter of 2008.

#### Domestic Crops<sup>1</sup>

An examination of the breakdown of the changes in Domestic Crop production by crop groups, shows that all of these groups recorded increases in production, ranging from a 5.2 % increase in condiments to 85.5 % increase in plantains. In terms of total volume, the 5,526.75 t, 1,657.6 t and 971.4 t increases in yams, vegetables and potatoes respectively were the most significant areas of increase.

**Table 1. Comparative Estimates of Domestic Crop Production by Crop Group 4<sup>th</sup> Quarter 2008/2007**

Crop Group	Production (Tonne)		
	2008 *	2007	% Change
Legumes	1326.7	1225.0	8.3
Vegetables	30983.2	29325.6	5.7
Condiments	5706.4	5424.5	5.2
Fruits	5167.2	3880.0	33.2
Cereals	505.9	418.4	20.9
Plantains	3128.3	1686.8	85.5
Potatoes	7962.7	6991.3	13.9
Yams	32755.0	27228.3	20.3
Other Tubers	8677.6	7925.4	9.5
Sorrel	420.3	358.1	17.4
Total	96633.2	84463.3	14.4

Source: Data Bank & Evaluation Division, Ministry of Agriculture.

\* revised

<sup>1</sup> Domestic crops refer to those crops which were historically grown mainly by small farmers for consumption in the domestic market.

Yams (33.89 %) and vegetables (32.06 %) were the most significant contributors to overall domestic crop production for the quarter.

### **Parish Performance**

At the parish level, significant increases in terms of volume were reported for Trelawny, where the 46 % increase in production was heavily weighted by yams, which did not sustain any significant damage during Gustav; St Elizabeth, where the 22.6% increase in production was driven by gains in vegetables (6.1 % increase), fruits (45.5% increase), potatoes (80.4 % increase), yams (62.4 % increase) and other tubers (37.9 % increase). Although there was a marginal decline in Manchester, it nonetheless made a significant impact on overall production, contributing more than 18% to the overall country total. Together the parishes of Trelawny, Manchester and St. Elizabeth contributed approximately 59 % to total production. Westmoreland, Hanover, St. James and Portland, especially hard hit by Gustav, the bad weather in the following months and the resulting late establishment of some crops, recorded declines. However, based on an analysis of crops currently in the field, it is expected that production will show significant advances in the first quarter of 2009.

### **Challenges**

As just alluded to, despite the increase in the 4<sup>th</sup> quarter results, there were many challenges that impacted on production. The effects of Tropical Storm Gustav, though not as devastating as Hurricane Dean in 2007, severely disrupted the sector through direct damage to crops, as well as setting back land preparation in many areas. This was due to the unseasonably early and prolonged rainy season which it heralded. The figures from the Met Office show that rainfall in August of 2008 was 197 % above normal and for August and September combined, was 143 % above normal. These months are critical land preparation and crop establishment periods for 4<sup>th</sup> Quarter production. Land preparation was set back in many areas and this served to delay crop establishment. Localized flooding in some areas also restricted crop establishment.

Another factor that affected the sector was the high cost of inputs, especially fertilizer, with many farmers initially deciding not to establish some crops because of their inability to afford it.

### **Response**

The resilience of the farmers in performing under such challenging conditions must be applauded. In addition, the intervention of the Ministry in providing tropical storm relief in the form of fertilizer vouchers, seeds, and technical guidance helped to drive the recovery process. The decision on the part of Government to import fertilizer directly and to make it available to farmers at significant saving, assisted in increasing crop establishment and also provided additional nutrition to crops already in the ground (given significant leaching of nutrients in many areas due to the heavy rainfall). Farmers were extremely enthusiastic about the imported fertilizers and there was strong demand for it.

The recovery process is expected to continue in the first quarter of 2009. This increase is projected based on improved weather conditions and the continued efforts of the farmers, supported by a number of initiatives being pursued by the Ministry, including a special Production and Productivity programme targeting select crops and farmers.

### Traditional Crops<sup>2</sup>

Most traditional crops suffered declines in production early in year. This was mainly as a result of the long term impact of Hurricane Dean. These crops by nature, generally take a longer time to recover. As a result, in most of these crops production declined in the first three quarters of 2008. The late start of the 2008/09 sugar crop also contributed to a decline in the sugar cane harvest.

Despite being affected by Tropical Storm Gustav in August, which devastated bananas, the damage suffered was not crippling, and indications are that for several crops including coffee, cocoa, and citrus there was significant improvement in the 4<sup>th</sup> Quarter.

**Table 2. Comparative Estimates of Production of Selected Traditional Export Crops, 4<sup>th</sup> Quarter 2008/2007**

	Unit	2008	2007	% change
Coffee	boxes	258,846	180,550	43.4
Cocoa	tonnes	203	59	244.1
Pimento	tonnes	577	221	160.3
Banana	tonnes	1,200	0	-

Source: Data Bank & Evaluation Division, Ministry of Agriculture.

Special attention has to be placed on bananas. The sub-sector was devastated both by Dean in 2007 and, to a lesser extent by Gustav in 2008. At present, banana exports have stopped and exports for 2008 were for all practical purposes, nil. Traditionally, banana production has been measured by the reported export figures, with no estimates made of the domestic consumption which is significant. The Ministry has therefore, taken a decision to establish a mechanism to provide estimates for bananas produced for domestic consumption. As a result, it was estimated that 36,000 t were produced for the domestic market in 2008, of which 1,200 t were produced in the 4<sup>th</sup> Quarter. This is compared with the 17,473 t exported in 2007. The estimate of 36,000 t is well below the 70,000 t – 100,000 t estimated as the capacity of the local domestic market for green and ripe bananas, because of the damage sustained in 2007 and 2008. It should be noted that these are preliminary estimates and the data collection and verification process will undergo further refinements.

### Summary

Overall, the sector experienced many challenges throughout the year, primarily weather conditions and the high cost of fertilizers and other inputs. As indicated, the performance of the Traditional

<sup>2</sup> The Traditional crops are those crops which were historically grown for export in either primary or semi-processed form, and include Sugar Cane, Banana, Coffee, Cocoa, Citrus, Pimento and Coconut.

crops which took a longer time to recover from the damage of Hurricane Dean, suffered setbacks in the first half of 2008. Despite these challenges however, recovery is taking place, as evidenced by the performance in the 4<sup>th</sup> Quarter, of not only short-term Domestic crops but also of many of our Traditional crops. This has resulted in the overall 8.0 % increase for the 4<sup>th</sup> Quarter of 2008.

Based on our projections, the sector is poised for even greater recovery and growth during the 1<sup>st</sup> Quarter of 2009.

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