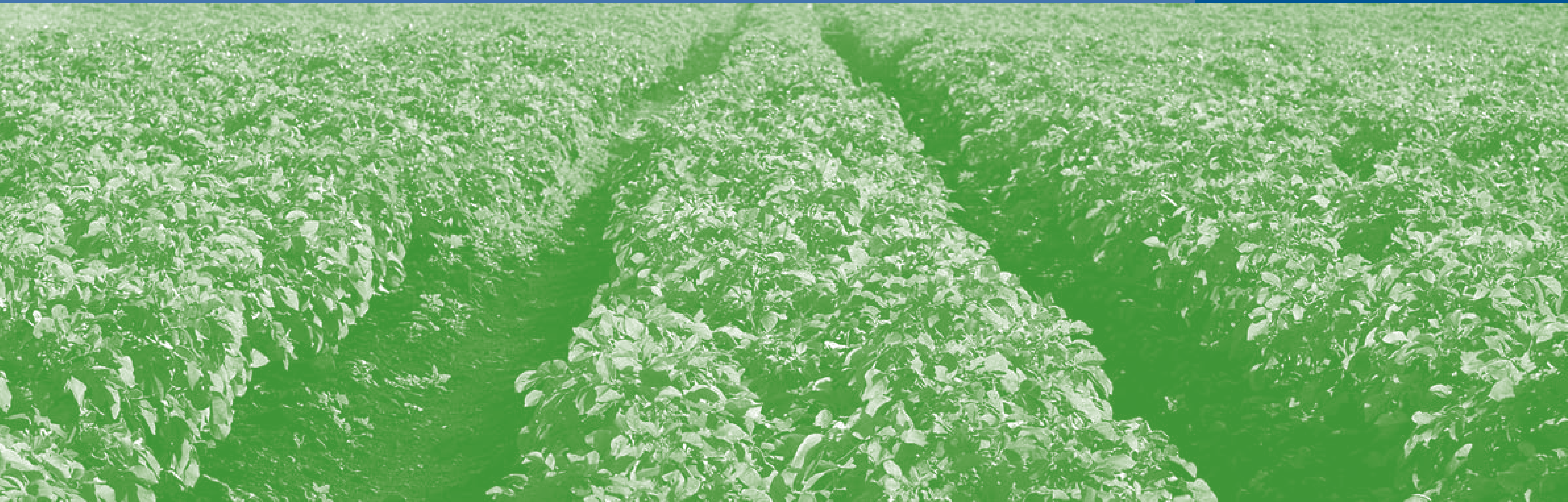
chapter three

Other Agricultural Industries and Crops



Other Agricultural Industries and Crops

Tea Industry

Cultivated Area

In 2007, the number of planters licensed at the Tea Board totaled 1,414, representing a 2 per cent increase compared to the 1,383 planters registered in 2006. The total area under tea amounted to 709 hectares in 2007 compared to 688 hectares in 2006.

Category of Planters	No. of Planters	Area Cultivated (Hectares)
Free Small Planters	616	237.13
Co-operatives	317	95.16
Métayers	474	186.47
Factory	-	-
Estates	7	190.48
Total	**1,414**	**709.24**

Production and Processing of Green Leaf

A total volume of 8,033 tonnes of green leaves were produced in 2007, showing a 5 per cent rise over the 2006 figure of 7,649 tonnes. Of that volume, 6 tonnes of green leaves were rejected as they were found to be sub-standard. Hence, the final tonnage processed amounted to 8,027 tonnes, 5 per cent more than the 7,649 tonnes processed in 2006.

Factories	Received and Processed (Tonnes)	%
Sté Usinière de Bois Chéri	3,475	43
Corson Tea Estate	1,873	23
La Chartreuse	2,679	34
Total	**8,027**	**100**

Production of Black Tea

Production of black tea amounted to 1,563 tonnes in 2007, 4 tonnes short of the volume produced in 2006 (1,567 tonnes). Table 11 hereafter shows the tonnage produced in 2007, both grade-wise and factory-wise.

Table 11: Black Tea Manufactured, Grade Wise and Factory Wise, 2007 (Kilos)

Grade	Total (Kilos)
Broken Pekoe 1	551,609
Pekoe Fannings 1	334,798
Pekoe Dust	79,331
Dust 1	38,692
Broken Pekoe	28,860
Pekoe Fannings	318,699
Fannings	71,381
Dust	17,171
Fannings 2	18,254
Broken Mixed Fibre	104,575
Total	**1,563,370**

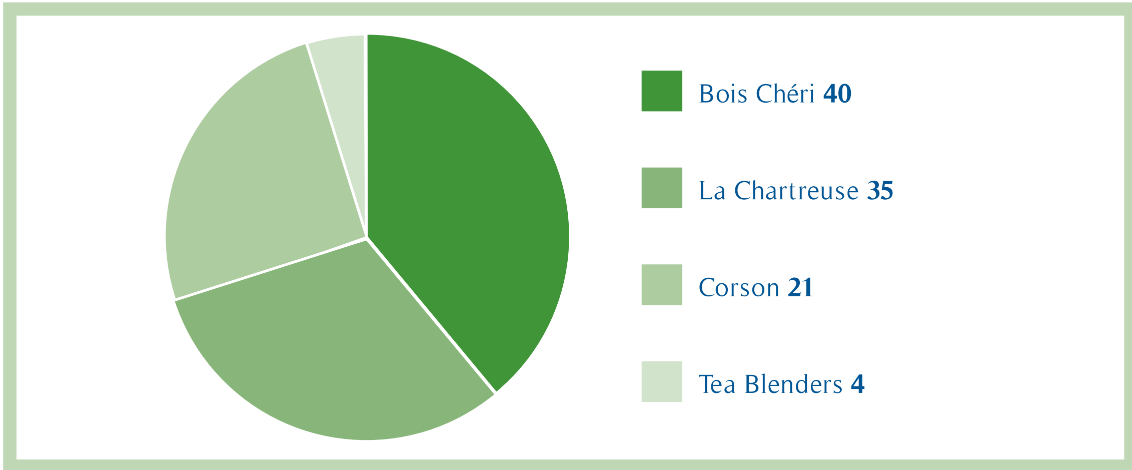
Local Consumption and Exports

1,486 tonnes of black tea were sold on the local market in 2007 against 1,463 tonnes in 2006. Exports remained more or less at the same level compared to 2006 (34 tonnes against 36 tonnes in 2006). The total sales volume amounted to 1,520 tonnes compared to 1,499 tonnes in 2006. France (60 per cent) and Réunion Island (38 per cent) remained the main markets where the near totality of our tea exports is destined.

Local Market Share in 2007

In 2007, Bois Chéri Tea Estate maintained its leadership as the largest tea manufacturer of the island with 40 per cent of market share, followed by La Chartreuse with 35 per cent (2 per cent more than in 2006), while Corson Tea Estate registered a 4 per cent decrease compared to 2006 (21 per cent against 25 per cent). Tea Blenders occupied 4 per cent of the market share against 3 per cent in 2006. Figure 5 hereafter shows the market share distribution among the three tea factories and Tea Blenders in 2007.

Figure 5: Market Share of Tea Factories and Tea Blenders in 2007 (%)



Other Agricultural Industries and Crops

Tobacco Industry

Crop Conditions

Virginia Flue-Cured

The 1st planting season campaign lasted from February to May 2007. Plantations were undertaken by 46 producers, out of the 128 growers registered with the Tobacco Board, on an area of 87 hectares and a production quota of 123 tonnes. Excessive rainfall coupled with the passage of cyclone Gamede close to the island seriously damaged the seed beds, as a result of which 70 per cent of the seedlings ready for transplanting were lost, hence delaying the plantation programme and the initial area earmarked for cultivation. Moreover, plant development was hampered by drought conditions prevailing during the vegetative growth of the plants, more particularly in the northern region.

During the 2nd season, undertaken mainly in the eastern part of the island, a total area of 152 hectares was planted by 80 producers. Plant development was in general satisfactory except in the region of St Julien where the plantations were severely affected by leaf necrosis problems. As a result, the plants were stunted and harvested leaves were of a poor quality.

Amarello Air-Cured

The first season plantation campaign was undertaken between March and June 2007 and 19 hectares were cultivated by 83 planters. Excessive rainfall severely affected the seedlings, of which 90 per cent were lost. Climatic conditions, during the initial growth period, were good but deteriorated during the vegetative growth due to drought conditions.

Pests and Diseases

High incidence of Tobacco Mosaic Virus affected Amarello plantations to the tune of an estimated 20 per cent of the area grown. Budworms *(Helicoverpa armigera)* were noted at Beau Champ and were successfully controlled with appropriate pesticides.

Agricultural Diversification

The World Food Crisis

Since 2006, there were clear indications that the world food market was starting to run short of supplies due to a series of factors registered all over the globe such as the persistent drought period in Australia, the world oil crisis, the use of cereals for the production of bio-fuels, the combined effect of climate change and the increasing food demand from emerging countries like China.

The dramatic rise and increased volatility of the price of food commodities, registered over the last twelve months, have shown the devastating impacts these can have on the purchasing power of populations and in particular the lower income groups. In certain cases, the world food crisis has pushed more people below the poverty line. More generally, the crisis is hitting the whole world with alarming force and speed and is not confined to a particular region of the globe.

The whole world is in a certain way responsible for this situation, as over the past two decades there has been gross under-investment in agricultural production and technology. This has resulted in static production, weak markets and underdeveloped infrastructure, mainly in developing countries.

With the current crisis, a window of opportunities has opened. Today's food crisis is an abrupt wake-up call and a powerful incentive to bring together under a new, coherent strategic orientation, immediate short-term needs and exceptional resources without compromising long-term development requirements. In so doing, nations will aim at strengthening agricultural productivity and at the same time rendering access to food affordable, namely for the low income group.

In this context, the Vice Prime Minister and Minister of Finance and Economic Development has, in his Budget Speech 2008-09, in response to global rising food prices and shortages, spelt out a five-pronged strategy in order to foster local food production so as to mitigate the high risk dependency of the country on imports. Hence, Government has provided Rs 1 billion for a Food Security Fund and has decided to set up a Food Security Fund Committee to administer and manage the fund, as per the Finance and Audit (Food Security Fund) Regulations 2008.

Government's initiative to foster agricultural (non sugar) production is most welcomed by the Chamber. Indeed, it is the first time ever that such an important budget is allocated to a sector which, over the years, has not been able to keep pace with the increasing consumption volume, as evidenced by our dependency on food imports, which today represent 70 per cent of our food needs. We sincerely hope that the new impetus which will be given to local production will help in increasing the country's resilience against high food commodity prices and reduce the country's dependency on imports.

Food Crop Production

Provisional statistics for the year 2007 show that national production of vegetables amounted to 83,704 tonnes out of a harvested area of 6,071 hectares. This represents a 7 per cent decrease compared to the harvested volume of 90,000 tonnes, coming from 6,521 hectares, in 2006.

The following graph shows the volume of food crop (excluding fruit) harvested between the years 2003 and 2007.

Figure 6: Volume of Food Crops (excluding fruit) harvested between 2003 and 2007 (Tonnes)

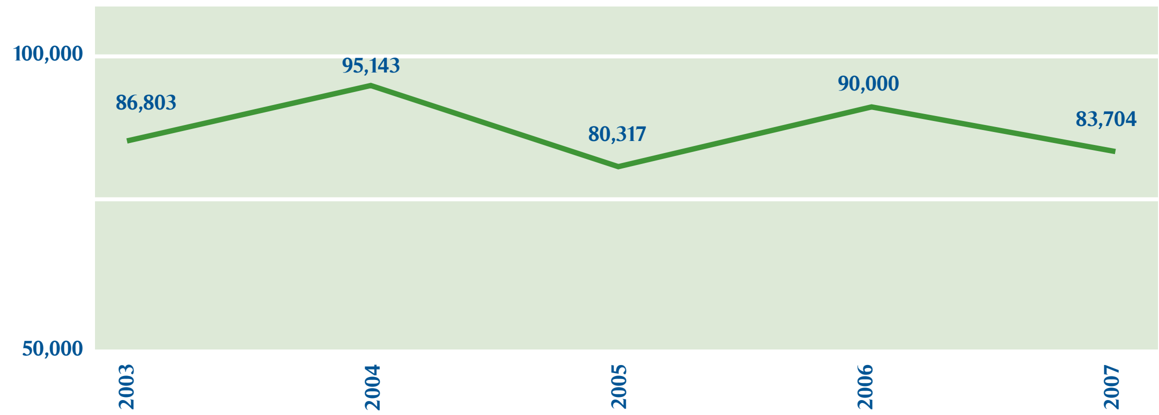


Table Potato

2007 Campaign

1,739 tonnes of seed potato, out of an initial order of 1,858 tonnes, were planted during the 2007 table potato campaign (1,185 tonnes in the first season and 554 tonnes during the second season). Table 12 shows the volume of seed planted by the different producer groups. The shortfall registered comes mainly from imported seed, as Australian suppliers were once again unable to provide the totality of the planting material ordered from them.

Table 12: Seed Planted by the Different Producer Groups (Tonnes)

Producer Group	1st Season	2nd Season	Total	%
Sugar Estates	499	231	730	42
Mauritius Agricultural Marketing Co-operative Federation Ltd (MAMCF)	245	148	393	23
Onion Producers Association	12	3	15	1
Young Farmers	87	9	96	5
ADMA	27	-	27	2
SIT	-	50	50	3
Others	315	113	428	24
Total	**1,185**	**554**	**1,739**	**100**

As is now the established principle, the Chamber carried out an analysis of the table potato campaign of its members, namely sugar estates, pertaining to the 2007 crop. The results of the analysis showed that:

(i) 13 sugar estates were involved in potato production;
(ii) 2 sugar estates produced potato solely in the first season;
(iii) 3 sugar estates cultivated potato solely during the second season;
(iv) 8 sugar estates grew potato in both the first and second seasons;
(v) The total area cultivated amounted to 342 hectares of Full Stand Equivalent;
(vi) June and July were the two main planting months;
(vii) The seed rate averaged 2.1 tonnes per hectare;
(viii) Total production reached 6,143 tonnes, of which 78 per cent were of first grade and the difference of second grade;
(ix) The volume produced in both seasons was equally shared;
(x) 72 per cent of the total production was harvested during the months of October and November;
(xi) The yield obtained averaged 18 tonnes per hectare;
(xii) 79 per cent of first grade production was sold ex field to merchants and 21 per cent to the Agricultural Marketing Board (AMB).

It is to be noted that the volume produced in 2007, island wise, is estimated to have been of the order of 14,000 tonnes.

Pricing Policy

The price of seed potato for ware production, irrespective of its origin, was fixed at Rs 33,500 per tonne and the guaranteed floor price for ware potato offered by the AMB stood at Rs 15,300 per tonne (Rs 14,080 per tonne in 2006).

Importation of Table Potato

Some 9,000 tonnes of table potato were imported in 2007 to supply the market during the off-season. Imports were equally shared between AMB and private importers. The main source of supply was India.

Table 13: Seed Potato Varieties Planted, 2003 - 2007 (Tonnes)

Variety	Origin	2003	2004	2005	2006	2007
				(Tonnes)		
Spunta	Local	828	1,007	872	776	677
Mondial	Local	100	10	121	14	35
Liseta	S.Africa	7	-	-	-	-
Delaware	Australia	526	547	366	459	793
Spunta	Australia	-	15	40	282	81
Spunta	Holland	-	-	4	-	-
Mondial	Australia	-	-	-	-	153
Total		**1,461**	**1,579**	**1,403**	**1,531**	**1,739**

2008 Campaign

1,250 tonnes of seed were planted during the first season 2008. The excessive rainfall registered during the months of May and June severely affected the plantations, mainly in the humid regions. In various parts of the island, outbreak of Blight and the incidence of Soft Rot were noted in the newly planted fields. It is feared that the adverse climatic conditions encountered will have a negative incidence on production. Moreover, it is expected that some 550 tonnes of seed will be planted during the second season campaign.

Pricing Policy

Following a request from the National Potato Committee, the AMB has decided, as from the 2008 campaign, to apply a differentiated guaranteed floor price for local and imported seed respectively. This decision has been taken following representations made by planters using imported seed, who pointed out that they were subsidising, through the unique selling price implemented by the Board, the cost of local seed.

Hence, for the 2008 campaign, the selling price in force for seed potato is as follows:

- Local seed: Rs 42,400 per tonne
- Imported seed: Rs 37,500 per tonne

Moreover, the guaranteed floor prices offered by AMB for production coming from local and imported seed respectively are:

- Production from local seed: Rs 18,425 per tonne
- Production from imported seed: Rs 17,450 per tonne

Other Agricultural Industries and Crops

Seed Potato

2007 Campaign
271 tonnes of seed potato (230 tonnes in the first season and 41 tonnes in the second season) were multiplied in 2007. Apart from Belle Vue, where an outbreak of bacterial wilt occurred, no major incident was noted.

The total volume of seed produced amounted to 534 tonnes. Detection of viruses by ELISA on some 1,450 samples showed an average level of 5.4 per cent of infected tubers. Only two viruses, PVY^N (2.6 per cent) and PVY^O (2.8 per cent) were registered. Seed lots were further examined at field level, following which 47 tonnes were discarded owing to virus infection above the established level.

Moreover, the maximum acceptable seed size was reduced from 200g to 150g.

Table 14: Varieties Multiplied in 2007 (Tonnes)

Variety	1st Season	2nd Season	Total
Basic Spunta	57	41.5	98.5
Local Spunta	173.3	-	173.3
Total	**230.3**	**41.5**	**271.8**

Table 15: Seed Potato produced in 2007 (Tonnes)

Variety	1st Season	2nd Season	Total
Basic Spunta	93.7	46.4	140.1
Local Spunta	394.1	-	394.1
Total	**487.8**	**46.4**	**534.2**

Liberalisation of the Importation of Seed Potato
It will be recalled that in last year's report, mention was made that, following a request from the Chamber, a technical committee was set up by the Ministry of Agro Industry and Fisheries to make proposals and recommendations pertaining to the liberalisation of the importation of seed potato.

The committee met six times and, having examined the views of all stakeholders of the potato sector, recommended to the Minister of Agro industry and Fisheries that the importation of seed potato be liberalised as from the 2008 campaign. However, the committee highlighted that the liberalisation of seed potato should be conditional to the following eligibility criteria:

(i) Solely destined to seed potato for the production of table potato;
(ii) Restricted to potato producers. No resale would be authorised;
(iii) Phytosanitary clearance required from the National Plant Protection Office;
(iv) Restructuration of the whole seed supply chain;
(v) Producers should agree to plant a certain volume of local seed in order to maintain a minimum strategic production stock of 400 tonnes of seed.

At the time of writing, the Chamber was still awaiting the decision of the Minister on the proposals made.

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Onion

According to the provisional figures published by AREU, local onion production amounted to 6,200 tonnes in 2007, representing a 36 per cent increase over the 2006 figure of 4,550 tonnes. The harvested area stood at 242 hectares against 170 hectares in 2006. The average yield registered was of 26 tonnes per hectare, nearly the same as that attained in 2006 (27 tonnes per hectare).

Moreover, in order to boost production, Government decided, in November 2007, to deregulate the retail price of High Yielding Varieties, until then fixed at Rs 14 per kilo, and to increase the guaranteed producer price from Rs 9,750 to Rs 17,000 per tonne. It is to be noted that the measures taken are in line with the proposals made by the Chamber in order to give a new impetus to the sector.

Palm Heart

In 2007, members of the *Groupement Palmiste* sold a total of 54,289 palm hearts, compared to 59,105 units in 2006. 23 per cent of this volume consisted of Grade 1, 66 percent of Grade 2 and the remaining 11 per cent represented produce of inferior quality. Moreover, only 11 per cent of the sales were made of palm hearts having been partially processed, namely vacuum packed. The majority of production (74 per cent) was sold to intermediaries, mainly for the hotel industry.

As at 31 December 2007, the total area under palm production, belonging to members of the Groupement Palmiste, amounted to 437 hectares.

Meat and Milk Production

Mauritius Meat Producers' Association
This section deals with information obtained from the Mauritius Meat Producers' Association (MMPA).

Figures obtained from the above association showed that, as at 31 December 2007, the herd force of members of the MMPA was as follows:

Table 16: Herd force of MMPA Members (Per Category), 2007

Category	Herd Force (Units)
Cattle	202
Sheep	26
Deer	36,760
Poultry (Layers)	265,166
Poultry (Broilers)	13,063,547

Extensive Deer Production
A total of 11,340 animals were shot during the deer hunting season 2007 for a volume of 396 tonnes carcass. This represents an average carcass weight of 35 kilos. The selling price averaged Rs 111 per kilo carcass with a variation fluctuating between Rs 107 and Rs 115 kilo carcass. It is to be noted that the recommended selling price to large butchers, for the 2008 campaign, has been fixed at Rs 129 per kilo carcass.

Other Agricultural Industries and Crops

Renewal of leases

During the year under review, members of the association who undertake deer rearing on state lands have obtained the renewal of their leases for a further 7-year period. However, a major change has been brought to the lease agreement, whereby lessees are no longer authorised to rent more than 500 hectares of state lands per lease. Moreover, the Shooting and Fishing Lease Act will shortly be amended to cater for new activities such as eco-tourism and *'Tables d'Hôte'*.

Control of *Stomoxys Nigra* flies

The MMPA continued to operate the production facility for the multiplication of parasites for the control of *Stomoxys Nigra* flies on deer farms. In this context, the association distributed, in 2007, over 10 M parasites to its members.

African Swine Fever

The dramatic outbreak of African Swine Fever in September 2007, which has decimated the local domestic pig population, has also seriously affected the wild boar population reared in feedlots. A total of 1,800 wild pigs, belonging to MMPA members, died or were shot to prevent the spread of the disease.

Intensive Deer Farming

During the off season 2007, members of the Mauritius Deer Farming Co-operative Society Ltd (MDFCSL) sold 1,820 carcasses for a volume of 53 tonnes. The sales were mainly focused on supermarkets and hypermarkets (78 per cent).

With the closing down of one of their major distributors, Savi Shop, MDFCSL entered into a marketing agreement with Panagora Marketing Ltd, one of the major distributors of foodstuffs on the island, for the sale of 60 tonnes of deer carcasses during the 2007 hunting season. The Co-operative more or less attained its objective as at the end of the season, with 56 tonnes of venison being provided to Panagora.

Sanitary Status of the Local Deer Herd

A French veterinarian, Dr Mathieu Roger, of the *Centre de Coopération Internationale en Recherche Agronomique pour le Développement* (CIRAD), who was following a 6-month training course at the Veterinary Services, undertook a survey of the sanitary status of the local deer herd. In a first report submitted in November 2007, he mentioned the presence of *Leptospirosis* in a number of deer farms over the island. In his final report, produced in March 2008, mention was made of the prevalence of eight diseases which could represent a constraint for the eventual export of live animals.

Slaughter of Livestock at the Central Abattoir in 2007

Cattle

7,811 head of slaughter cattle, representing a volume of 1,847 tonnes carcass, were slaughtered at the Central Abattoir in 2007. Of this volume, local production accounted for 42.5 tonnes (225 head), representing 2 per cent of the total consumption of fresh beef, and that of Rodrigues 40 tonnes (276 head). Hence, national production contributed to a mere 4.5 per cent of consumption. The difference was made up of imported stock originating from Australia and Kenya.

Goats and Sheep

5,832 goats and sheep were slaughtered in 2007. The total volume produced amounted to 74.6 tonnes. Local production amounted to 28.6 tonnes (3,529 head), representing 38 per cent of the volume produced. The average carcass weight of local animals stood at 8.1 kilos against 20 kilos for the imported stock.

Pig

Production of pork meat slaughtered at the Central Abattoir, amounted to 511 tonnes (7,814 head slaughtered) in 2007. It is to be stressed that, following the outbreak of the African Swine Fever in September 2007, no pigs were slaughtered at the Central Abattoir in November 2007 in order to prevent the spreading of the disease.

African Swine Fever

A severe outbreak of African Swine Fever was registered in the country in September 2007 and was confirmed after blood samples had been analysed at the Onderstepoort Veterinary Institute in South Africa at the beginning of October 2007. It is suspected that the disease might have been brought in through the illegal entry of infected pork meat by passengers and sailors which was fed to pigs through garbage. As there is no cure for the disease, Government took the decision to stamp out all infected and suspected animals on infected farms.

Pig breeders were apprised of the situation and of the measures taken to prevent the spread of the disease to non-infected farms. Moreover, at the request of the Ministry of Agro Industry and Fisheries, the *Office International des Epizooties (OIE)* provided the services of an expert to assist the local Veterinary Services.

The preventive measures taken to stop the further spreading of the disease were as follows:

(i) The pig section of the Central Abattoir was closed to prevent the movement of pigs;
(ii) Three pig regions (Roche Bois, Bassin Requin and St Martin) were declared quarantine zones and restriction of pig movements, persons and vehicles was enforced in accordance with the provisions of the Animal Disease (Swine Fever) Regulations;
(iii) An operation of stamping out of pigs on infected farms was put in place; and
(iv) Dead pigs were disposed of on three identified sites.

Furthermore, Government decided, in order to alleviate the financial burden of pig farmers following the outburst of the disease, to:

(i) Freeze the repayment of loans contracted with the Development Bank of Mauritius as well as interest payable thereon;
(ii) Provide pig feed including transport;
(iii) Set up a special loan scheme at the DBM, up to a ceiling of Rs 200,000 per breeder, at a concessional interest rate of 5 per cent over a period of 7 years;
(iv) Pay a monthly income support based on the farm's herd force.

Moreover, Government also decided to set up a Pig Restructuring Committee with a view to defining a strategy in order to give a new boost to the sector in the wake of the disease. It is estimated that the total quantum allocated by Government to the pig industry amounted to Rs 125 M.

Other Agricultural Industries and Crops

Poultry

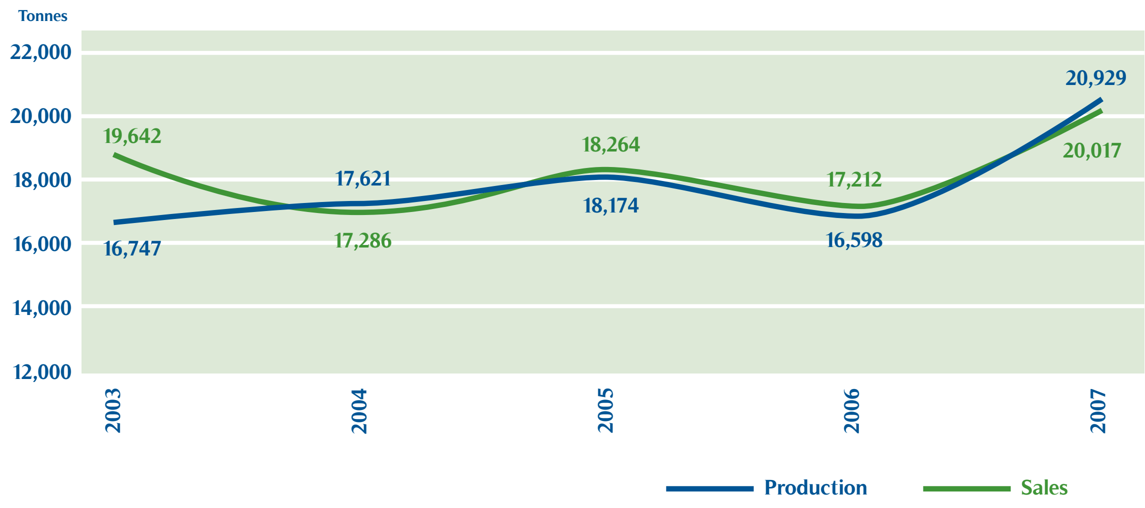
Production of broiler meat by members of the MMPA amounted to 20,017 tonnes in 2007, representing a 16 per cent increase compared to the 17,212 tonnes produced in 2006. Sales rose from 16,598 tonnes in 2006 to 20,929 tonnes in 2007 (+26 per cent), broken down as follows:

- Frozen meat : 9,808 tonnes (47 per cent).
- Fresh meat : 11,121 tonnes (53 per cent).

In addition, some 6.5 M of day old chicks were sold to local farmers as well as exported to countries of the region.

Figure 7 shows the tonnage of poultry meat produced and sold by MMPA members between the years 2003 and 2007.

Figure 7: Production and Sales of Broiler Meat by MMPA Members, 2003 - 2007 (Tonnes)



Animal Feed

In 2007, total production of animal feed reached 164,626 tonnes, 6.6 per cent higher than the 154,386 tonnes produced in 2006. Poultry feed is predominant (85 per cent of total production) whilst the production of other feeds has significantly increased from 2,501 to 9,641 tonnes over the year. Table 17 below displays the various production levels of the different feeds over the 2003-07 period.

Table 17: Production of Animal Feed by Sector, 2003 - 2007 (Tonnes)

	2003		2004		2005		2006		2007	
Sector	**Tonnes**	**%**	**Tonnes**	**%**	**Tonnes**	**%**	**Tonnes**	**%**	**Tonnes**	**%**
Poultry	117,132	79	131,014	86	136,855	84	137,822	89	140,822	85
Ruminant*	8,871	6	10,020	7	12,090	7	11,006	7	9,845	6
Pig	2,914	1	3,872	2	3,018	2	3,057	2	4,317	3
Others	19,642	13	6,934	5	11,521	7	2,501	2	9,641	6
Total	**148,559**	**100**	**151,840**	**100**	**163,484**	**100**	**154,386**	**100**	**164,626**	**100**

*Cattle and deer

Milk Marketing Scheme

Following a Government decision, the Agricultural Marketing Board (AMB) stopped operating the Milk Marketing Scheme as from May 2008. This decision was taken as a result of the increasing deficit registered over the past years by AMB in the purchase of local fresh milk production. Indeed, it has been noted that the volume of fresh milk collected by the Board has registered a decreasing trend, hence making it uneconomical to continue collecting fresh raw milk over the island and having the product pasteurised before being sold to the general public. Indeed, small producers obtain a better price in marketing their produce themselves than if sold to AMB, despite an increase in the producer price from Rs 12 to Rs 17 per litre in December 2007. Hence, between January and June 2007, AMB collected only some 405,000 litres of raw milk and sold a volume of 357,774 litres of pasteurised milk, packed in ½ litre plastic bags. Following the increase in the producer price, the retail price was raised from Rs 20 to Rs 26 per litre.