

The Changing Structure of the Banana Industry in the Philippines and Its Implication on Local Workers

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Abstract

The impact of the recent changes in the agri-food trade and production system on labor is rather complex and mixed. Multinational companies in the Philippine banana industry have divested from their direct involvement in production through managing or owning plantations and shifted to more value-adding activities in the supply chain. This provides opportunities for the local growers to be entrepreneurs and creates a new type of employment pattern based on kinship or relational factor. Empirical data from this study show that there is a significant increase in the number of new workers hired as help-outs by the small landowner growers. At the same time, however, the transformation of employment arrangements challenges the labor conditions of the work force, especially from the points of view of labor standards in the Philippines. Multiple specifications and pack-type demands of global markets put further pressure on the workers' efficiency and productivity.

1. Introduction.

One of the important issues of outsourcing by global firms is its implication on employment (Kritzinger, Barrientos, and Rossouw 2004: 18). Recent debate has shed light on the agricultural production risks, which will be borne by weak parties such as the growers and workers. Moreover, compliance with the high quality requirements and stricter social, environmental and hygiene standards of global market compelled the growers to cut costs, which include squeezing the workers' benefits (Barrientos and Barrientos 2002: 11).

Much of the discussions on the impact on labor of the global integration of agricultural production system can be drawn from the studies done by Dolan and Sutherland (2003); Barrientos, Dolan and Tallontire (2003); Nadvi (2004); Dolan (2004); Kritzinger, Barrientos and Rossouw (2004); and Dolan and Humphrey (2001). Their key findings include: i) the existence of clear gender division between men working in the farms and women working at the packinghouses; ii) the unskilled nature of jobs concentrated at the production stage; iii) the intensification of informal labor arrangements (e.g. contractual and seasonal laborers) especially in female-dominated activities; and iv) the unequal

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income and benefit gains and lack of employment security of contractual and seasonal workers. These studies, however, have mostly looked at the context of the trade links between African producers and big European retailers. They specifically focused on how the outsourcing techniques and more stringent requirements of big European retailers shape the employment characteristics of fresh fruits and vegetable industry in the region. Although there are a number of studies looking at the impact of global agribusiness on employment, there are few which focus specifically on small landowner growers at the supply base. Nadvi (2004: 20) cited the limited attention on workers in the wealth of literature on the global integration of production at the industry, firm and organizational level. Furthermore, according to Posthumus (2007: 9), a systematic assessment on how the development of value chain¹ for global agribusiness impact on agricultural and processing jobs is still lacking and a specific focus on workers is relatively new.

Thus, this paper aims to contribute to narrowing this research gap by examining the labor impact of the global chain integration of small landowner growers, using the case of the Philippine banana industry. For the purpose of this paper, key global banana companies dominated by Dole Food Company are referred to as “MNCs”; small landowner growers are referred to as the new local producers who have been integrated into the banana industry chain in the late 90s and who own not more than three hectares of land;² and corporate growers are defined as local private companies engaged in supplying bananas to MNCs. The main focus of the paper is the packinghouse workers or help outs employed as waged laborers by the small landowner growers.

The recent structure of the Philippine banana industry is characterized by the partial or complete divestment of MNCs from managing farms, which is specifically true in the case of Dole Food Company. Moreover, the implementation in 1998 of the Comprehensive Agrarian Reform Program (CARP) served as a key factor in this transformation, which has enabled the participation of a large number of small landowner growers. At this point, no study has provided a comprehensive understanding of the labor implications of these changes, including a map out of the origin of the deterioration of employment along the banana industry chain.

This paper advances an argument that these changes in the banana industry chain have increased the number of packinghouse workers hired by the small landowner growers. From an estimated 13,239 packinghouse workers in 2000, it now totals to an estimated 18,000 workers.³ This increase in packinghouse jobs has resulted in more opportunities to earn. But these opportunities could be undermined with the new type of working arrangements highly based on relational factors and adverse labor standards. These are coupled with a more demanding work output driven by the global consumers’ stricter requirements.

This paper is organized into five sections. The next section explains the data collection methods used in the study. The third section sets the stage by outlining the recent trend of the banana industry at the global level and the Philippine banana industry. The fourth section focuses on the case of the

banana supply chain in Davao region and explains what has led to new types of employment structure. The last section discusses the consequent impact on the workers, especially those in packinghouses.

2. Methods of Data Collection

The study employed a combination of qualitative and quantitative data collection methods, including surveys, stakeholder interviews and personal observations. The use of multiple sources of information was deemed necessary for triangulating the responses and arriving at more reliable findings. More emphasis was also given to qualitative method to get sufficient details and fully understand the emerging labor issues in the banana industry. The study focuses on packinghouse workers since most of the employment takes place inside the packinghouse. It was found during preliminary fieldwork that local growers were more likely to maximize the use of family labor on their farms than to hire extra farm workers. Fieldwork was undertaken in Davao region from April to May and from November to December in 2007. During fieldwork, the packinghouse workers employed at five cooperatives in DAPCO village were surveyed. The five cooperatives, as shown in Figure 2, were purposely selected because their membership consisted of small landowner growers with their own packinghouse workers.⁴ Banana plantations in the DAPCO area had been managed or leased by Dole-Stanfilco until 1998 when, as a result of CARP, the small landowner growers took over direct ownership and management of banana farms. They then formed their own cooperatives and entered into a contract farming agreement with Dole-Stanfilco. Hence, the five selected cooperatives were among the pioneers of the new production set-up and wage employment in Davao region. They were thus judged to serve as suitable cases for examining how integration of small landowner growers in a global banana chain would affect packinghouse workers.

Two hundred out of 599 packinghouse workers employed by the small landowner growers belonging to the selected five cooperatives make up the survey population. Approximately 30 percent of the packinghouse workers of each of the selected cooperatives were included in the survey.⁵ For the purpose of having a point of reference between workers of the small landowner growers and MNCs, an additional 60 packinghouse workers employed by MNCs were likewise surveyed. Since all packinghouse workers were engaged in production lines all day long, whoever happened to be able to leave the production lines and make themselves available for a short period of time were asked to fill in the survey forms. Although this was not an ideal method to ensure objectivity, it was considered appropriate in view of the exploratory nature of this study. Ethical consideration for the worker's time since their payment was based on piecemeal wage rates (at the cooperative-owned packinghouses) also influenced the choice of the method. However, individual workers who can accommodate further questioning without disturbing their job were interviewed to get more in-depth information.

To fill in gaps of information and validate responses, key stakeholders from Department of

Agriculture and Department of Labor and Employment, Dole-Stanfilco, corporate growers producing for Del Monte Fresh Philippines and other small landowner growers located in Davao City and Davao del Norte were also interviewed.

3. Global Banana Industry

Bananas remain a key commodity in the group of fruits and vegetables specifically during the period 1985–2002 when it displayed a relatively stable 4 percent share of the world export market. It's the fifth largest agricultural commodity in the world, after cereals, sugar, coffee and cocoa (Chambron 1999: 1). The significance of the banana industry is evident by its contribution to the economy of developing countries mostly in terms of export earnings and employment generation. Mainly, Cavendish bananas⁶ are traded for world market and account for some 43% of global banana production (Aria et al. 2003: 75).

The special climatic conditions required for growing bananas favor production in developing countries. They are grown in tropical regions, with an average temperature of 27 degree Celcius, and a yearly rainfall of 200–250 centimeters (UNCTAD 2003: 15). Banana production involves smallholder growers due to its dual nature of having smallholder growers producing alongside large plantations. Large plantation systems are mostly controlled by MNCs due to its capital and technology intensive nature, while smallholder production is much less capital intensive but more labor-intensive. In Ecuador, many small and medium-sized independent growers dominate the production due to the land ownership restriction for the MNCs. The Carribean, particularly the Winward Islands, is characterized by smallholder banana production due to topographical factors. They have the highest level of dependence on banana exports because it is the only year-round crop that provides a regular weekly income for small farmers. In Asia, the bulk of banana export comes from the Philippines. Bananas were mostly grown on plantations by MNCs until the implementation of the land distribution program in the country in 1998 (UNCTAD 2003: 16–23).

The banana industry has generated a large amount of employment due to the individual care needed for banana plants and handling of fruits for packing (Garces and Matringe 2002: 7). Among the top banana exporters, Colombia generated 22,000 jobs directly from banana production and packaging and 65,000 indirect employment from provision of inputs and support services in the banana industry. In Costa Rica, the number of jobs created directly by the banana industry is 40,000 and another 100,000 have been created indirectly. In one of its provinces, over 93% of the population is employed in the industry (UNCTAD 2003: 19–21). In 2005, the Philippine banana industry's total value of contribution to agriculture reached 11% (National Statistical Coordination Board 2007).⁷ The available data from the National Statistics Office show that in 1999 there was a total of 20,000 to 30,000 farm workers employed in the banana industry in Davao Region (AFRIM 2004c: 13).

At present, the dominant banana companies remain the large multinationals of Dole Food Company, Fresh Del Monte and Chiquita, which together account for 60–70 percent of world exports (UNCTAD 2003: 10). Control of the downstream end of the chain (e.g. shipping and marketing) has become more important to these MNCs than managing their own plantations, although they still retain some farms to mitigate production risks.⁸ The oversupply of bananas and price crisis precipitated the MNCs withdrawal from their own plantations starting in 1993 (Aria et al. 2003: 84–85). They disposed of their overseas owned lands and replaced it with long-term contract with independent growers.⁹ MNCs provide technical and in some cases financial assistance to the growers while the latter shoulder land, labor and transportation costs (Hellin and Higman, 2002: 3). Moreover, as the retailers have gained more influence over the price and quality of bananas, the MNCs have shifted their attention to improving their relationship with these retailers, which they have sought year-round, long-term partnerships¹⁰ (van de Kastele 1998: 18).

The Philippines has also been affected by the changes happening at the global level as indicated by the use of contract growing by the MNCs. Del Monte Fresh (Philippines), Dole-Stanfilco (a division of Dole Philippines), Sumitomo, Fresh Asia Produce Co. International and Chiquita/Unifrutti are the key global players in the Philippine banana industry.¹¹ While the use of contracted grower farms is not entirely new, the preponderance of the use of contract growers¹² in the country is significant. To be cost effective, some MNCs use a mix of managed farms, individual growers, and cooperatives or associations of small landowner growers as suppliers. This creates more opportunities for local banana growers¹³ to be integrated into the global supply chain. Second and further reinforcing this phenomenon is the implementation of CARP¹⁴ in the country. Consequently, some farmers who used to be workers in the MNCs managed-farms have become the new landowners. They engaged into growership contract with MNCs towards the end of the 10-year deferment of CARP. Attention has been mostly concentrated on the impact of these changes on the growers, with insufficient regards to local workers. Hence, the need to understand how the banana industry chain has been transformed and its impact on local workers.

The importance of the Philippines in the global banana industry is signified by its share of the world banana export market and its production growth rate. The country ranked as the world's third largest world exporter in 2000, representing 13.67 percent of global exports (UNCTAD 2003: 23). It dominates the banana export for Asia, with 70 percent of Japan's domestic consumption imported from the country (DA & NAFC 2002). Cavendish type bananas constitute the bulk of export earnings at US \$333 million (1.83 million metric tons) in 2003 and US\$324.03 million (1.785 million metric tons) in 2004 (DTI 2004: 9). Its production growth was 83%, which was even faster than the global rate of 39.37% from 1997–2004 and it also experienced a growth in export of 54% from 1997–2003 (Digal 2005: 2).

4. The Changing Structure of the Philippine Banana Industry: A Focus on Davao Region

Banana production in the Davao region reached a total of 4.28 million metric tons in 2004, which was 76% of the total Philippine production (DTI 2004: 10). The transformation in the structure of banana industry chain is evident in this region as reflected by the changes in the roles of chain actors, the new type of production and employment set-up, and the more demanding and stringent requirements of global market. These factors have influenced the recent labor conditions in the banana industry.

4.1. Increased Role of Small Landowner Growers

One of the important features of the recent banana industry chain is the increased number of small landowner growers. They are the new entrepreneurs in charge of their own production and employment. Based on the number of CARP beneficiaries, who directly engaged in production, there are 3,971 new small landowner growers possessing a maximum of three hectares of land in Davao region. They are the former workers of MNCs before the implementation of CARP.

Although options are available for the small landowner growers to rent their lands back to MNCs under CARP's Lease Agreement,¹⁵ the number of land areas under growership agreements proved higher. Table 1 shows that small landowner growers' cooperatives under growership arrangement with MNCs have a total number of hectares of land that is nearly twice as big as those cooperatives under lease agreement. This implies more direct participation of local growers as tillers and managers of the lands they owned. As growers, they also receive a higher income of P100,000 per hectare of the land that they now operate, compared to P30,000 per year as farm workers under Lease Agreement (Diga 2005: 18).

At present, numerous operations and activities are outsourced by Dole-Stanfilco to allow them more focus on strategic aspects of their business (i.e. marketing, shipping, cold storage, etc). Dole-Stanfilco claimed that they have only fewer than 400 regular employees on the farms that they have managed to retain, although they work with 10,000 grower associates.

Apparently, the management responsibilities of small landowner growers have grown. The packinghouses are checked and audited by Dole-Stanfilco staff, but the operational management is in the hands of small landowner growers, especially those who have formed cooperatives. Small landowner growers formed cooperatives to consolidate their volumes and meet the minimum five hectares of land required by Dole-Stanfilco.

The structure of the banana supply chain in Davao, with Dole-Stanfilco and Del Monte Fresh as the dominant players, is represented by Figure 1. It can be seen that diverse types of growers make up the supply base in Davao region. Other than Dole's retained plantations, MNCs purchase bananas from

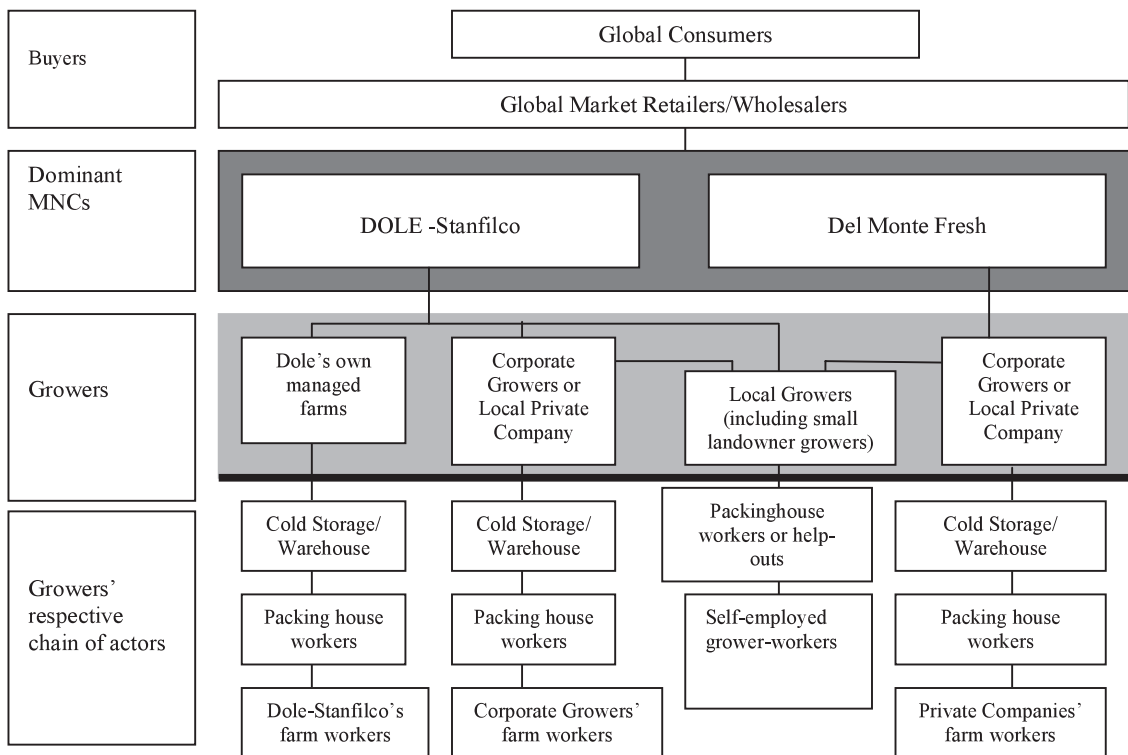
Table 1 Land Areas of the Small Landowner Growers as Represented by Cooperatives under CARP's Growership and Lease Agreements

Cooperatives under Growership Arrangement	Land Areas (in hectares)	Cooperatives under Lease Agreement	Land Areas (in hectares)
AMSKARBENCO	526	DAMARBDEVCO AND MEPI	799.5644
AMSMARBMCO	300	WEARBEMCO AND WADECOR	485.6413
BARBCO	22	PAHEMPCO AND PAHECO	160.8801
CFARBEMCO	227	NEMPCO AND NESTFARMS	146.0424
DARBCO-IFS	295	CTEMPCO AND TADECO	716.669
DARBCO-MDS	150	EARBDECO AND EVERGREEN	21.589
DARBMUPCO A	115	DAVECO**	65.8789
DARBMUPCO B	434	DAVECO	18.1342
HEARBCO -1	450	DAVECO	29.4296
MAGREBCO	128	DAVECO	27.4065
LCBA-MPC	60	DAVECO	12.1325
SARBEMCO	70	DAVECO	10.1838
SFARBEMCO	234	DAVECO	34.6896
BBGMC	116	SARBAC	87.3825
CASMIDECO	255	NAKATA	37.1985
CCBGC	29	PBEARBAI	78.227
KABANAY-MPC	80	PHDC	33.9
KIMBAGROCO	133	CABEARBCO	42.1883
KINSAN	116	VPIARBCO	29.16
LBGC	134		
SEARBEMCO*	351.64		
YANGSON	14.999		
AMSEFFPCO & AMSFC	72.81		
PHDC	231.33		
CBHARBEMCO	34		
BHARBCO	29.9		
SFC	2.32		
GROUPS	2.4		
GOLDEN BANANA COOPS	40.93		
PAFAMUPCO	42		
Total	4696.329		2836.2976

Source: Department of Agrarian Reform data as of 2004, FEDCOOP, Author's Fieldwork, 2007

*SEARBEMCO is the mother cooperative of ARBISM and DARBDECO, which are among the chosen cooperatives in the study.

**DAVECO appeared several times because DAVECO landholdings are located in several locations (Cawayan, Wangan, and Sirib, Calinan, Davao City) and the leasing of its land happened on different dates from 1998 to 2004.

Figure 1 Supply Chain Configuration of Dole-Stanfilco and Del Monte Fresh

Source: Author's Fieldwork, 2007

different growers, including small landowner and corporate growers to market to retailers and wholesalers abroad. Corporate growers also source from small landowner growers for their own supply of bananas. This indicates the wider involvement of small landowner growers in the supply base. Each of the grower's respective chain is composed of several value-adding activities from production, packaging and transportation.

Del Monte Fresh does not grow its own bananas and obtains all its supplies from local corporate growers like Tagum Agricultural Development Corporation, Inc. (TADECO) and Lapanday Foods Corporations. The majority of professionally managed corporate farms are family-owned companies with usually 100 hectares of land or more (Asiafruit 2007).

Corporate growers are also engaged into growership agreements with small landowner growers. In the case of Lapanday, for instance, from approximately 7,000 hectares, of which all were operated through a corporate managed system, their 2001 data revealed a 75–25 percent combination of managed farms and contracted growers respectively. Data for 2006 brings this combination to about 67 percent managed farms and 33 percent contracted growers. Furthermore, it is expected that in the next five years, the mix will come close to 50/50 in the utilization of corporate managed farms and growership agreement.

4.2. New Production Set-Up and Wage Employment

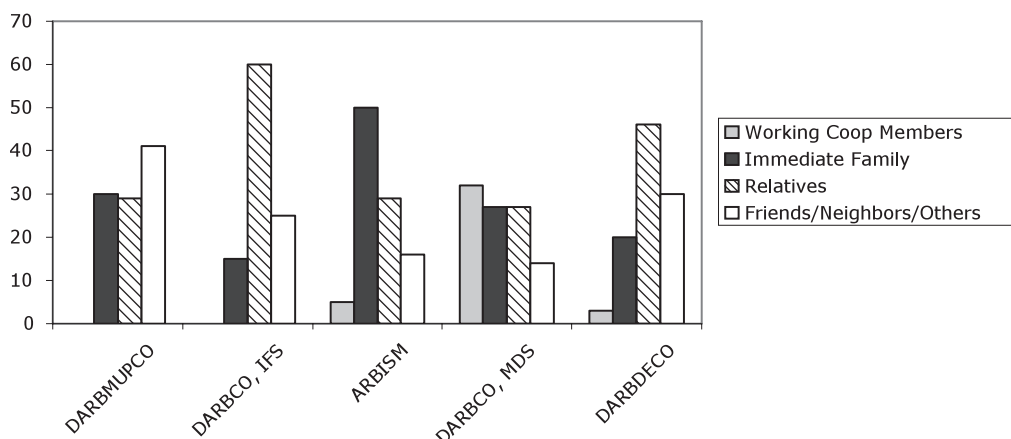
Under growership agreement, there is now a trend towards a more defined buyer-seller relationship called the Banana Production and Purchasing Agreements (BPPA) for a period ranging from four to ten years. This started between Dole-Stanfilco and various Agrarian Reform Beneficiaries (ARBs) and has been the benchmark of other growership contracts entered into by other local growers and their cooperatives. (AFRIMb 2004: 7).

Under the BPPA, bananas are packed under the MNCs' brand and growers assume all responsibilities in farm management, including the risks of weather, production and labor costs (Asiafruit 2007: 1). This is a deviation from the traditional grower subsidy scheme where MNCs essentially maintain control over production by providing inputs to growers and imposing farm management practices, including wage labor facilitation (AFRIM 2004b: 4). The primary roles of MNCs are to guarantee a market and deal with other market issues, provide logistics and ensure growers' commitment on the quantity and quality of the bananas produced. MNCs are free of any responsibility or liability for any loss, damage or injury that cooperatives or any of its members and workers may suffer. They started divesting from their managed farms partly to do away with employment controversies. For instance, a five-year labor dispute of farm workers against Dole-Stanfilco in 1998 ended up under the responsibility of the new small landowner growers who took over the farm and assumed the role of legal employers of the farm workers (AFRIM 2004b: 4).

Moreover, with BPPA, responsibilities over bananas are assumed by the MNCs at pre-determined stations, such as ex-packing plant, ex-wharf, or ex-vessel. For instance, small landowner growers retain the ownership of bananas, until MNCs accept the properly cleaned and packed bananas and loaded on their vans at designated ports. Only when the bananas are loaded on the vans are the bananas considered sold and MNCs become responsible for any damages that might happen.

Under the PBBA, small landowner growers till and manage their respective lands individually through the Individual Farming System (IFS). They formed cooperatives but only to handle centralized operations such as aerial spraying, harvesting, packaging, marketing, bookkeeping, infrastructure maintenance, technical assistance, credit and purchase of farm inputs. Unlike the corporate type, members in the IFS cooperatives hired workers or what they call as help-outs on an individual basis. Each small landowner grower is entitled to recommend a help-out in the farm and packinghouses. Around 85 percent are the small landowner growers' kin – brother, sister, son-in-law, daughter-in law, cousin, etc. The remaining 15 percent are neighbors, friends, acquaintances or personal network (AFRIM 2006: 7). The selected cooperatives in this study likewise show the trend towards non-standard wage employment (Figure 2).

The practice of employing help-outs is the way for small landowner growers to sustain their farm and packing operations as new entrepreneurs and to cope up with the challenges of meeting the demands of global market (AFRIM 2006: 7). Small landowner growers can be more flexible in their

Figure 2 Composition of Packinghouse Workers of the Sample Cooperatives

Note: *Working Coop Members* are the small landowner grower members of the cooperatives who decided to work in the packinghouse; *Immediate family members* refer to wife and children; *relatives* refer to extended family members such as parents, siblings, aunts and uncles, and cousins among others; and *others* refer to friends or acquaintances.

Source: Small landowner Growers, Author's Fieldwork, 2007

operation, have full maneuver or control over the workers and be assured of a more accountable and concerned workforce by recommending someone related or close to them. This is especially true in the case of packinghouses where quality requirements are very strict.

4.3. More Stringent and Complex Global Market Requirements

More stringent and complex global market requirements are external factors, which likewise influenced labor conditions. Packinghouse workers, consisting of help-outs, are now confronted with the challenges of meeting more stringent and complex global market requirements. Ultimately, they are required to pack export-quality bananas for whatever the markets desire (Table 2). They have to be aware of the multiple specifications of each country market and pack the fruit without delay.

The workers in-charge of grading and sorting of harvested bananas have to be very keen in identifying various defects that result in rejection of the fruit. Bananas are graded according to classes A (as the superior class), B and C. Close monitoring of bananas is done through designating an in-house quality inspection officer from the MNCs to the growers' own packinghouses. MNCs reserve the right to inspect at any given time all operations involved in the growing, packing and shipping bananas.

Before 1997, the work process performed by packinghouse workers was simple. Foreign markets only required boxes containing hands of bananas that must weigh 13.5 kilos. Now, there are so many pack types, which usually vary according to the number of banana clusters per box, the number of banana finger/s per cluster, weight range per cluster and calibration among others (Table 3).

Table 2 Different Market Demands for Bananas (per country)

Specification	Countries					
	New Zealand	China	Singapore	United Arab Emirates	Japan	
					Type 1	Type 2
Fingers/cluster	4-8	5-9	5	4-6	3-4	5-6
Calibration	Max: 48 Min: 41	Max: 48 Min: 38	Max: 47 Min: 41	Max: 43 Min: 37	Max: 47 Min: 42	Max: 50 Min: 40
Finger length/cluster	8 inches	7.5"	8 inches		8 inches	7.5"
Packing pattern	3 layers	4H/5H lengthwise pack 6H/7H crosswise pack cluster-crosswise pack	4 layers	4-5 hands crown down lengthwise pack	3 or 5 layers	4 layers

Source: Cooperatives Supplying Dole-Stanfilco and Lapanday Corporation, Author's Fieldwork, 2007

Table3 Changes in the Pack types Demands for Exported Bananas

Before Single Pack type	Present Different Pack types								
Pack by the									
Hands	Specifications	Type 1	Type 2	Type 3	Type 4	Type 5	Type 6	Type 7	Type 8
Hands of	No. of cluster/box	13	13	16	18	18	16	18	20
bananas in	No. of finger/cluster	5-7	5-7	5-7	3-5	4-6	5-7	3-5	4-5
a box that	Weight range/clusters								
must weigh	Pplant Acceptance	940-1150	940-1150	750-950	680-850	750-950	750-950	680-830	550-750
13.5 kilos	PW Acceptance	920-1150	920-1150	720-950	670-850	720-850	720-950	670-830	520-750
	Market Acceptance	900-1150	900-1150	700-950	650-850	700-850	700-950	650-850	500-750
	Calibration	39-47	39-47	39-47	40-47	39-47	40-47	41-47	37-44

Source: Author's Fieldwork, 2007

Depending on the market, pack types may also vary.

There are also requests for bananas with less chemical inputs, and for those that are either vacuum or non-vacuum packed. Sometimes special varieties are ordered.

5. Implications on the Workers

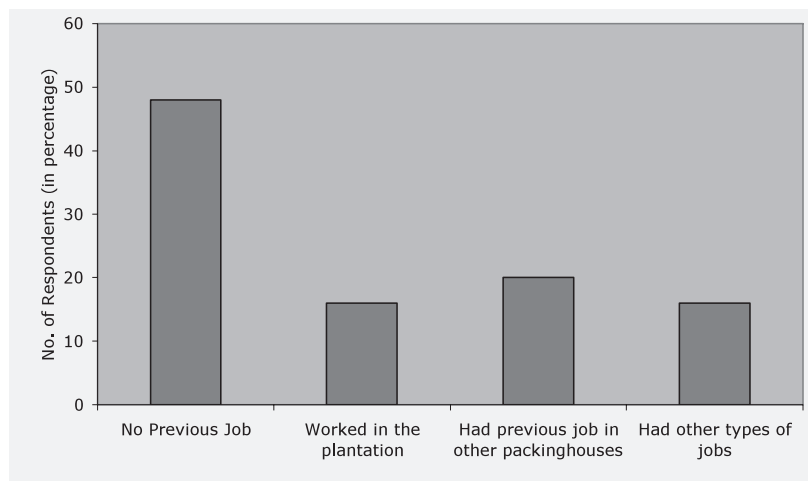
Taken together, the changes in the banana industry have created new challenges on the new type of workers, called help-outs, at the packinghouses. Specifically, the opportunities for small landowner growers to manage their own cooperatives created more employment. However, it paved the way for insecure and poor employment conditions.

The challenges in the labor conditions faced by the workers employed by the small landowner growers are more evident when compared with MNCs' workers. MNCs have been long engaged in brand competition and continuously seek to maintain a good reputation in the banana industry. Dole-Stanfilco, for instance, has been certified for Social Accountability 8000, which audit and certify labor practices. Interview revealed that this obliged them to provide their packinghouse workers with at least the minimum benefits required by the law.¹⁶ Interview data also indicate that labor burdens are lifted from MNCs with the emergence of smallholder growers and this further enables them to meet the employment benefits of their remaining workforce.¹⁷ Workers of smallholder growers are synonymous to contract workers who are excluded from the scope of national labor laws. The consequent absence of any complaints by the help-outs, due to a waiver they signed to abide by any conditions of the small landowner growers, further limits the role of the government to protect them. Investigation and monitoring of labor issues have been mostly confined on the cases filed to government offices on any violations of the labor code. Against this backdrop, the emergence of workers employed by small landowner growers created a hierarchy of social gains among the workers in the banana industry.

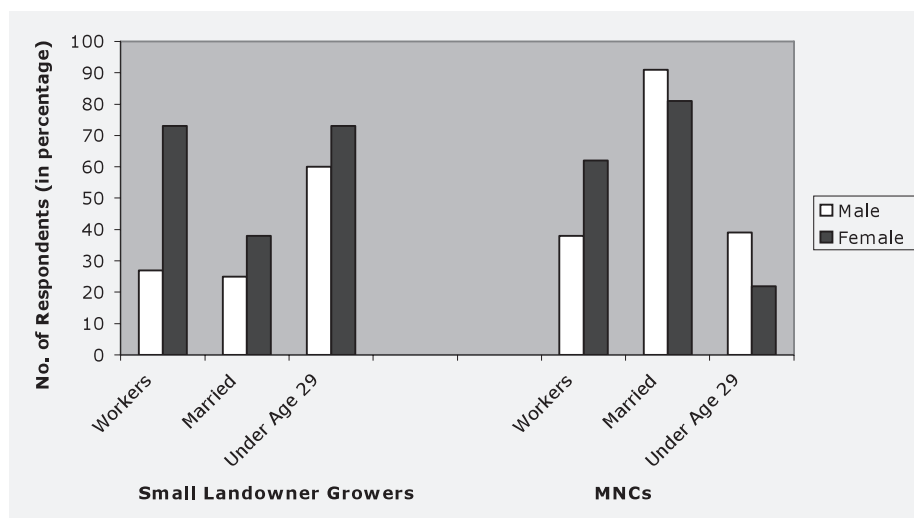
5.1. Increased Employment Opportunities

The labor-intensive nature of the export of Cavendish bananas opens up opportunities for employment in the local area. This is even more so with the emergence and increased number of small landowner growers who are employing their own packinghouse workers. Of the total workers surveyed, 48 percent did not have work prior to their employment in the packinghouses (Figure 3).

The demographic characteristics of the survey population show that the vast majority of workers employed by small landowner growers are young and unmarried (Figure 4). Specifically, 60 percent of men and 73 percent of the women are under the age of twenty-nine. The workers of the MNCs are generally married and older. This could be accounted for by the fact that MNCs have been in operation in the region since 1960s.

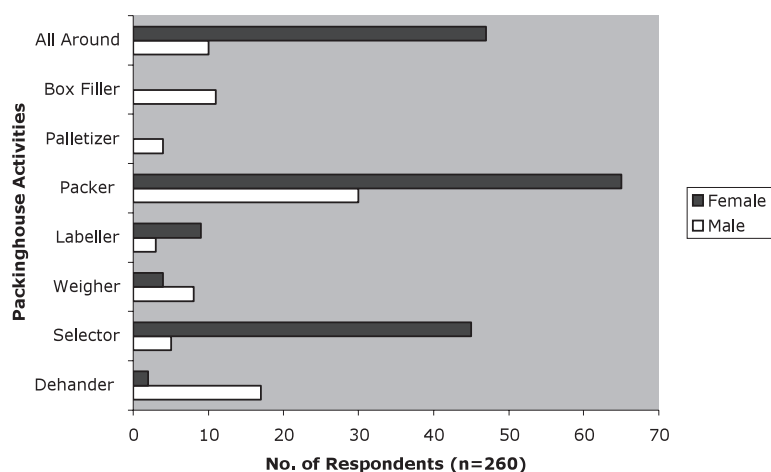
Figure 3 Job Before Employment in Small Landowner Growers' Packinghouses

Source: Author's Fieldwork Survey, 2007

Figure 4 Gender, Marital and Age Composition of Survey Population

Source: Author's Fieldwork Survey, 2007

There is also a trend on the concentration of female employment in packinghouses. This is due to production imperatives of strict quality and efficiency by the global consumers, which are equated to feminine traits of dexterity. Seventy-three percent of the workers employed by smallholder farmers are female and 62 percent for MNCs (Figure 4). They dominate sections such as selecting/grading, packing, labeling that require more feminine traits. On the other hand, male workers are mostly in-charge of work requiring more physical strength such as dehanding, weighing, palletizing and piling boxes (Figure 5). Female workers also show more flexibility in terms of all-around jobs.

Figure 5 Gender Segregation in the Selected Packinghouses

Source: Authors Fieldwork Survey, 2007

5.2. Differentiated Income and Benefits Gain

The new employment pattern is characterized by a more flexible system of wage payment. Workers employed by the individual small landowner growers are under the piece rate (*pakyaw*) system, while the workers of MNCs enjoy a more stable wage system on a per day basis, with overtime and holiday pay. MNCs also provide yearly wage increases on the workers' daily wage. This is part of the provisions agreed on the Collective Bargaining Agreement (CBA) between the management and the workers.

The workers of the small landowner growers are paid by the number of boxes they produce in a day. Boxes are multiplied by the rate per box and divided by the number of workers in the packing station. Thus, the more workers there are in a packinghouse, the smaller the take home pay of each. The pay is also not fixed per box, but depends on whether the fruit is class A or B (higher pay is given for the former). Different cooperatives have different rates per box, with an average of 6 boxes per hour compared to P230/day for 8-hour work for those working for MNCs.

Sometimes, workers of small landowner growers work for only three days a week depending on the volume of demand from overseas market to the MNCs. They follow the 'no work, no pay' system which further intensifies their vulnerability.

Constant demand for multiple pack types further slows down the productivity and efficiency of the workers due to various specifications (e.g. special pack types vis-à-vis the former one uniform pack type) that they have to conform with and the longer hours of work it takes in the process. Workers also experience confusion on the multiple types of packing orders. Interview revealed that re-packing and rejects have become more frequent and these also result in lower take home pay for the packinghouse workers.¹⁸

Table 4 Benefits and Entitlements of Packinghouse Workers

Benefits and Entitlements	Under MNCs*	Under Small Landowner Growers
Daily Allowance	✓	✓
Safety and hazard pay	✓	None
Paid sick leave	✓	None
Christmas bonus	✓	Conditional
13 th month pay	✓	Conditional
Maternity leave with pay	✓	None
Maternity leave without pay		✓
Philhealth	✓	Individual payment as self-employed
Others:	Separation pay	None

✓ This mark means existing

* MNCs include Dole-Stanfilco and corporate growers of Del Monte Philippines

Source: Author's Fieldwork, 2007

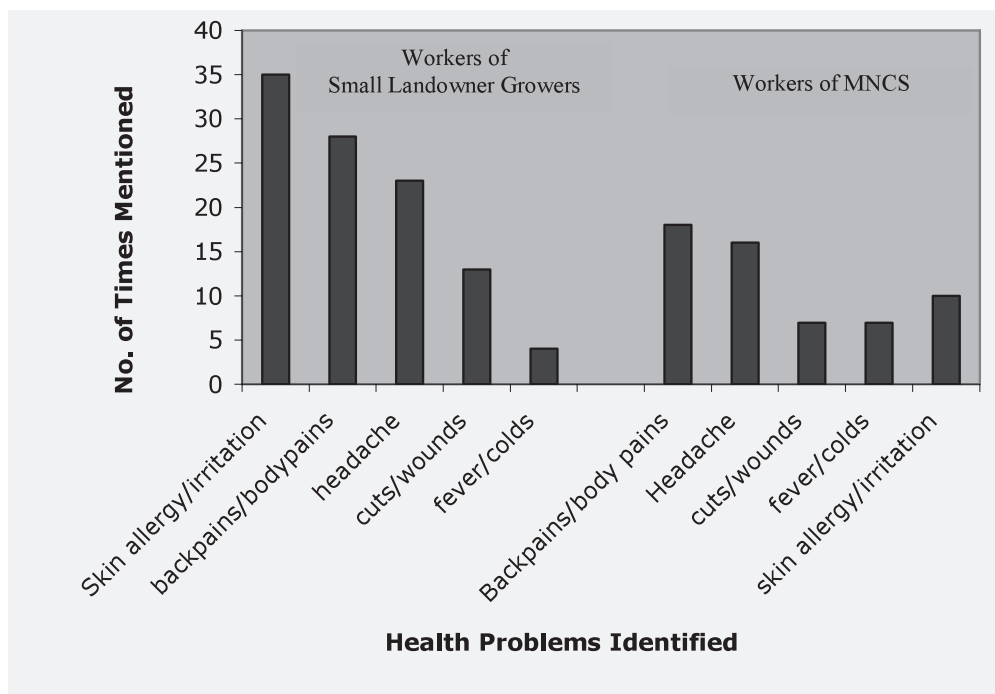
Though the economic gains from packinghouse employment are relatively small, it serves as additional income to the small landowner growers with the employment of their spouses, husbands and children and those previously unemployed workers. Some women in the study relate that if they were not currently employed in the packinghouse, they would just be at home taking care of their children. Now, they can be secured of monthly income while their parents or in-laws take care of their kids. Moreover, 66 percent of the surveyed workers of the small landowner growers spend their income on family living expenses alone and 34 percent use their income for their own personal expenses.

Fieldwork indicates that the provisions of benefits and entitlements solely depend on the prerogatives of the small landowner growers. These are largely determined by their annual financial performance. It is customary that workers pay their contributions to health insurance as self-employed. Table 4 shows the benefits and entitlement under the labor laws, which are provided to the packinghouse workers by small landowner growers and MNCs.

5.3. Poor Employment Conditions

Part of working conditions is the provision and use of Personal Protective Equipment (PPE) to protect the workers from work hazards. PPE commonly used in packing stations are rubber boots, aprons, gloves, safety shoes and caps. Sometimes even facemasks are needed for workers who spray fungicide on banana crowns.

Figure 6 Health Problems Experienced by the Packinghouse Workers of Small Landowner Growers and MNCs (in frequency, 2005–2006)



Source: Author's Fieldwork, 2007

PPE pose budget constraints among small landowner growers as it adds to their cost per box. Sometimes, PPE provided to the workers are deducted from their salary. MNCs strictly require the use of PPE for their own compliance to certain international quality standards like ISO, Good Manufacturing Practices, Hazard Analysis and Critical Control Point, etc. They provide PPE for their workers free of charge as part of their benefits and entitlement.

The survey indicates that regardless of the employer, health risk is a general concern of the packinghouse workers in the banana industry. Though the direct effect is hard to determine, workers often associate such risks with their poor working conditions including lack of PPE, poor ventilation and insufficient lightings. One of the frequent complaints of the workers of small landowner growers, especially the selector, was the lack of gloves that expose them to cuts and wounds and even chemicals from clustering bananas. Seventy-seven out of the 200 surveyed packinghouse workers of small landowner growers and 31 out of 60 packinghouse workers employed by MNCs have identified health problems related to work (Figure 6). The most notable difference between the workers of the small landowner growers and MNCs is the higher percentage of skin disease or allergies in the former, which are related to the issue of the provision of gloves mentioned above.

Workers stay for 10–16 hours a day during peak seasons, from April to June and October to

December. Some spend longer hours of work for two or three consecutive days to meet the delivery deadlines for a given week. The tendency to overwork is inevitable since the freshness of bananas depends on the length of time from the moment it was harvested to the time it reaches the market. Some women relate that they hardly rest at all, especially during peak seasons. They worked for an average of 12 hours in the packinghouse and when they get home they still attend to the needs of their children. This causes a lack of balance in work and personal life, which in turn poses a danger to health. On the other hand, certain companies particularly Dole-Stanfilco, limits its overtime to two-hours in compliance with Social Accountability 8000 certification.¹⁹

Fifty-three percent of the surveyed workers of small landowner growers received trainings or seminars while employed in the packinghouses. These seminars are mostly concerning the changes on the quality demands of bananas and the proper packing procedures. Field survey indicates that they do not receive any trainings or seminars on work safety and protection, which are provided by the MNCs to their workers. Interview revealed that many small landowner growers have to realize the value of investing in training, development and protection of their packinghouse workers.²⁰

5.4. Lack of Security of Tenure

The employment pattern of the small landowner growers has blurred the concept of security of tenure and changes the landscape of labor relations. While permanent employment is not possible, immediate family or close relatives feel more secure as they are personally related to the growers. Fifty-eight percent of the respondents feel reasonably secure in their employment while the remaining 42 percent feel otherwise. Field research shows that respondents who feel reasonably secure are the immediate families and relatives of the small landowner growers while those insecure are those employed friends, neighbors and others not related by blood. Moreover, interview data revealed that there is no written agreement specifying the rights of the later for security of tenure and entitlement to separation pay. Consequently, permanency is understood as the right to work freely in the packinghouses as long as the small landowner growers allow.

Any problems or complaints of the packinghouse workers are the sole responsibility of the small landowner growers who hired them. In some cases, a waiver will be signed by the workers to abide by the conditions of the small landowner growers. This prevents them from demanding complete entitlements under the labor laws. One worker shared that she feels awkward to demand for wage increase, although she is not satisfied, because it will be shouldered by her father-in-law who hired her. Her hesitation comes from the fact that her father-in-law also provides support to her family from time to time. Thus, labor relations are characterized by a patron-client system where workers are so dependent or beholden to their sponsors that they are willing to forego their labor rights. Fifty percent of the surveyed workers of the small landowner growers indicated satisfaction with the management policy of their employers; the dominant view seems to be that being employed is still

better than having no source of income at all.

On the other hand, cases can be filed against MNCs with the illegal termination of their workers. They tend to have more regular than contractual workers in compliance with the Philippine Labor Code, which states that workers should be regular if they are performing jobs necessary and desirable to the firm's business. All the surveyed workers are regular employees of the MNCs. Interview indicates that contractual workers for MNCs serve as a 'stop gap' for absent regular workers, overly high volume of fruits, and other extra jobs. When the work normalizes, they are terminated or moved to other activities until their contracts expire.²¹

Regular workers of MNCs are entitled to separation pay. It is given when the workers are retired, redundated or retrenched, which are all reported and approved by the Department of Labor and Employment (DOLE). MNCs have a leeway to retrench workers but this should still be in accordance with the labor laws.

5.5. Constrained Labor Organizing Rights

Field research indicates that packinghouse workers cannot organize themselves formally into a union owing to their unique employment arrangements. They have to bear the consequences of working without union representation to defend their rights.

Seventy-four percent of the workers of the small landowner growers feel that they are free to voice their concerns to the packinghouse supervisor. However, workers also revealed that positive resolution still depends on the willingness of the small landowner growers to act on it. Furthermore, being too assertive or expressive of rights can also be threatening to a worker's tenure.

On the other hand, regular workers of the MNCs are allowed to organize themselves into a union under a closed shop policy. Organization is usually prompted by the need to increase their economic packages through the strength of unionism. They hold election among themselves to choose their union officers. Eighty percent of the MNCs' workers are satisfied with their union representation. These workers indicted the need for frequent labor management consultations and meetings and regular feedbacks for further improvement.

There are basically two types of meetings between the workers and the management of MNCs: (i) through labor management consultation or LMC with representatives from management and labor union and (ii) grievance meetings that usually come after an LMC meeting. Negotiations between MNCs and workers are done through: (i) verbal informal requests of the workers' needs and wants and (ii) formal written requests of resolutions or proposal relevant to CBA, including both economic and non-economic matters. Ultimately, the effectiveness of negotiations strongly depends on the boldness and commitment of the representatives of the labor unions in negotiating workers' demands.

6. Conclusion

Using the case of the Philippines, this study found out that the recent changes in the structure of the banana industry have complex consequences on workers' conditions. These changes have created significant labor demands with the increased number of small landowner growers who are now managing their own cooperatives and employing their own workers. This provides particular gains to women because of their inherent feminine traits that are well suited to meet the quality demands of exported bananas.

However, compliance and conformance with labor standards was relegated to the back room due to the new type of employment pattern based on kinship or relational factor. Unlike the more formal employee-employer relations, workers are not at all protected by labor laws but on how well connected they are to the small landowner growers. Workers employed by the MNCs are relatively in the best condition in terms of economic gains such as wages, bonuses and other entitlements. The compensation of the new type of worker, known as help-outs, are not at par with that of MNC's workers. The bonus and entitlements of help-outs are dependent on the financial performance of the growers, coupled with unpredictable monthly wages based on a piece rate system. However, it cannot be overlooked that the majority of these help-outs were previously unemployed and have only recently gained access to income. Thus, the consequent additional income proved significant to them.

In terms of social gains, security of tenure is blurred as the relationship to the growers has more weight than length of stay or performance. The help-outs also do not enjoy rights like right to organize and freedom from overwork and work hazards, which are mostly enjoyed by the regular workers of MNCs. The workers may voice their suggestions and opinions directly to packinghouse supervisors but lack the bargaining power to pressure the small landowner growers to act on their request.

All these changes in employment are happening against the backdrop of intensifying quality demands and product differentiation by the global market. This further puts unwanted pressures on the workers. They are now working longer hours to comply with a diverse range of consumer demands but producing smaller output and therefore on even lower pay.

Overall, the condition of workers in the Philippine banana industry is not far from the general experience of agricultural workers in Africa mentioned at the beginning of the paper. This is particularly true in terms of gender segregation at work and quality of working conditions. However, one significant difference is the inevitable participation of small landowner growers in the Philippine banana industry, although the agri-food trade commonly put their participation at risk. The implementation of CARP in the Philippines secures the smallholder farmers' involvement in banana production. So far, this presents challenges to the social labor conditions of hired workers. More serious attention should be given to ensure that the new role of small landowner growers do not breed a new type of disadvantaged groups of workers.

Apparently, there is a need to couple the increased employment opportunities with quality work in the banana industry. Workers employed by the small landowner growers should be entitled with safety and hazard pay, sick leave with pay and health benefits given the unsafe working environment in packinghouses. They should also be given the right to organize and given work protection as enjoyed by the workers of the MNCs. Government support, which can be channeled through CARP, should be provided to the small landowner growers to help them sustain their operation without undermining the labor conditions. Workers satisfaction may be influenced by the ultimate goal of earning income regardless of the work situation. Ultimately, seeking for competitive edge brought by globalization should not only be about more gains by the global firms, which moved to more productive functions, but should also be concerned with the conditions of the emerging workers at the supply base. There should be a policy to ensure that there are fair economic and social gains for all in the process of the changing structure of the global agri-food chain.

Notes

- 1 According to the definition of Sturgeon (2001: 11), global value chain refers to the “sequence of productive activities leading to and supporting end use”. It goes beyond the focus on production and includes the whole range of activities starting from the design, production, marketing and distribution of products (Shemitz 2005).
- 2 The 1987 Philippine Constitution prescribes 3 hectares of land to be an economic family-size farm, which can constitute land reform beneficiaries and small landowners.
- 3 Land areas for banana production in Davao Region were 36,775 hectares in 2000 (DA & NAFC 2002). and rose to 50,000 hectares in 2007 (PBGEA 2008). Due to lack of existing data on the total number of packing house workers, an estimate was done based on the assumption that there are 120 workers per every 100 hectares of land cultivated with bananas and 30% of these workers are employed in the packing houses. This computation was the generally accepted equation in the banana industry in Davao Region.
- 4 According to the Cooperative Development Authority, there are 1,795 multi-purpose cooperatives in operation as of 2005. Of these, 49 consist of small landowner growers of export-oriented bananas.
- 5 The number of surveyed workers for each cooperative is: 25 out of 70 for DARBMUPCO, 60 out of 180 for DARBCO IFS, 50 out of 146 for DARBCO MDS, 30 out of 83 for ARBISM, and 35 out of 120 for DARBDECO.
- 6 Cavendish bananas are also called dessert bananas and are consumed as fresh fruit. Cavendish replaced Gros Michel in the sixties as the most important variety for export bananas because of its resistance to the most notorious plant disease called Panama wilt disease and its relatively higher productivity yield compared to other varieties. However, Cavendish are more prone to damage when handling that consequently started the packing of bananas in boxes. (INFOCOMM 2006: 36)
- 7 The banana industry in the country was already established with available production technology. In 1958, a policy was created to develop bananas as a commercial crop for export under the Export-Oriented Industrialization Program. Mindanao was the pilot area due to its conducive lands and weather for growing bananas (Baylon and Amoyen 1989: 65).
- 8 The percentage of banana supply from MNCs owned plantations is 30–35% for Dole; 27% for Fresh Del Monte and 40% for Chiquita (van Kastele and Stichele 2005: 18).
- 9 Overall, from 1984–1996, bananas from MNCs-owned farms fell from 60% to 50% respectively, with MNCs sourcing produce from countries with lower labor costs (Aria et al. 2003: 86). Chiquita, for instance, decreased its leased land property from 52,000 hectares in 1994 to 24,000 hectares in 2003 (van Kastele and Stichele 2005: 18).

- In Honduras, it disposed of 1200 hectares of less productive land in the mid 1990s (Aria et al. 2003: 86)
- 10 The presence of big retailers is stronger in developed countries such as Europe where 75% of bananas are brought from just four supermarkets. Five out of every six bananas sold to consumers is traded by only one of a dozen retail companies (Banana Link 2003: 1).
 - 11 In 2003, Dole-Stanfilco was the leading exporter, followed by Del Monte Fresh (Digal 2005: 6). In 2000, Del Monte Fresh and Dole-Stanfilco have 30.29% and 36.45% shares of the total export to Japan respectively (DA and NAFC 2002). Together they account for 73% of banana exports in Korea and 39% in China (Digal 2005: 6).
 - 12 Contract growing under the Agrarian Reform context is defined as a “producer-buyer arrangement where the agrarian reform beneficiaries own land and commit, either collectively through their cooperative or individually, to produce certain crops for an investor or agribusiness firm that contracts to buy the produce at pre-arranged terms (Department of Agriculture AO No. 9, series of 1988).
 - 13 New local banana growers are the individual worker-beneficiaries of the distributed commercial farms under CARP. They used to be workers of MNCs but have become small landowner growers who undertake banana production from their newly acquired land for assured purchase of MNCs (AFRIM 2004b: 3).
 - 14 CARP was defined by CARP Republic Act 6657 as “redistribution of lands, regardless of crops or fruits produced, to farmers and regular farm workers who are landless, irrespective of tenurial arrangement, to include the totality of factors and support services designed to lift the economic status of the beneficiaries...”
 - 15 Lease Agreement is an agreement whereby the landowners bind themselves to an investor (e.g. MNCs) through a contract for the enjoyment or use of their land for a certain price and for a definite period (DAR Admin Order 02, 1999).
 - 16 Personal interview with Mr. Cesar Opena, Manager, Dole- Stanfilco, Calinan (May 9, 2007).
 - 17 Personal interview with Mr. Venerando C. Cebrano, Chief of Department of Labor and Employment- Davao City Office (April 25, 2007).
 - 18 Personal interview with Mr. Mr. Alberto Berolla, Officer of Hijo Cooperative (November 23, 2007).
 - 19 Personal interview with Mr. Cesar Opena, Manager, Dole-Stanfilco, Calinan (May 9, 2007).
 - 20 Personal interview with Mr. Rod Madarang, Department of Agriculture Focal Person for Banana Industry (May 3, 2007).
 - 21 Personal interview with Mr. Gerardo Ongkingco, AVP of Lapanday Food Corporation and Vice-President of the Philippine Banana Growers Association (November 15, 2007).

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