DEVELOPING AN ACTION PLAN FOR PROMOTION OF A REGIONAL AGRIBUSINESS SECTOR AND TARGETED COMMODITY ENTERPRISES

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FINAL REPORT
EXECUTIVE SUMMARY/WORKING DOCUMENT

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We are extremely grateful to all the stakeholders who participated in the focus group meetings and interviews: these individuals are shown in Appendix 1 of the report.
ABBREVIATIONS

ADB	Trinidad and Tobago Agriculture Development Bank
ACP	African, Caribbean and Pacific Countries
AGREXCO	Agricultural Export Company
AIC	Jamaica Agricultural Industrial Corporation
ALBA	[Bolivian alternative for the Americas]
ASSP	Agricultural Support Services Project
BAIC	Bahamas Agricultural Industrial Corporation
BAMDC	Barbados Agricultural Marketing Development Corporation
BMP	Barbados National Union of Fishfolk Organisation
BDS	Business Development Services
BIDC	Barbados Industrial Development Corporation
BMDC	Belize Marketing Development Corporation
CABA	Caribbean Agribusiness Association
CAFAN	Caribbean Farmers’ Network
CAHFA	Caribbean Agricultural Health and Food Safety Agency
CARDI	Caribbean Agricultural Research Development Institute
CARICOM	Caribbean Community and Common Market
CBERA	Caribbean Basin Economic Recovery Act
CBI	Caribbean Basin Initiative
CBD	Caribbean Development Bank
CEDA	Caribbean Export Development Agency
CEO	Chief Executive Officer
CET	Common External Tariff
CIF	Cost, Insurance and Freight
CFNI	Caribbean Food and Nutrition Institute
COTED	Council for Trade and Economic Development
CSME	Caribbean Single Market Economy
DEXIA	Dominica Export Import Agency
DFLSA	Development Finance Limited of South America
EC$Eastern Caribbean Dollars
ECCB	Eastern Caribbean Central Bank
ECTAD	Eastern Caribbean Trading Agriculture and Development Organisation
EDF	European Development Fund
EDU	Export Development Unit
EPA	European/Economic Partnership Agreement
EEZ	Exclusive Economic Zone
EPA  Economic Partnership Agreement
FAO  Food and Agricultural Organisation
FEFIC  Food Exports to Food Imports Coefficient
FETEC  Food Exports Relative to the Value of Total Exports Coefficient
FERGDP  Food exports relative to gross domestic product
FIRGDP  Food Imports Relative to Gross Domestic Product
FITIC  Food Imports Relative to the Value of Total Imports Coefficient
GABA  Guyana Agribusiness Association
GAP  Good Agricultural Practices
GCT  General Consumption Tax
GBTI  Guyana Bank for Trade and Industry
GDP  Gross Domestic Product
GIDC  Grenada Industrial Development Corporation
GMC  Guyana Marketing Corporation
GSA  Guyana School of Agriculture
HACCP  Hazard Analysis Critical Control Point
HTG  Haitian Gourde – Currency
IDB  Inter-American Development Bank
IFAD  International Fund for Agricultural Development
IICA  Inter-American institute for Agricultural Cooperation
JAMPRO  Jamaican Promotions Corporation
JAS  Jamaican Agricultural Society
JEA  Jamaica Exporters’ Association
JI-KBCs  Jagdeo Initiative – Key Binding Constraints
LDCs  Less Developed Countries
MOA  Ministry of Agriculture
MDCs  More Developed Countries
NAFTA  North American Free Trade Association
NAMDEVCO  National Agricultural Marketing Development Company
NARI  National Agriculture Research Institute
NDF  National Development Foundation
NGMC  New Guyana Marketing Corporation
NFFA  National Food Crop Farmers’ Association
OECS  Organisation of Eastern Caribbean States
PIDP  Percentage of Imports to Domestic Production
PIDS  Percentage of Imports to Domestic Supply
PPDS  Percentage of Production to Domestic Supply
PPP  Public Private Partnership
PSA  Partial Scope Agreement
R&D  Research and Development
Developing an Action Plan for Promotion of a Regional Agribusiness Sector and Targeted Commodity Enterprises


RICB
Regional Investment Coordination Board

SAG
Shipping Association of Guyana

SCT
Special Consumption Tax

SEDU
Small Enterprise Development Unit

SIDC
Seafood Industry Development Company

SITC
Standard International Trade Classification

SLDB
St. Lucia Development Bank

SLMB
St. Lucia Marketing Board

SME
Small and Medium Enterprises

SFS
Sanitary and Phytosanitary Measures

SRC
Science Research Council

SVG
St. Vincent and the Grenadines

TCP
People’s Trade Agreement (in Spanish)

TTABA
Trinidad and Tobago Agribusiness Association

TTMA
Trinidad and Tobago Manufacturers’ Association

UG
University of Guyana

UNCTAD
United Nations Conference on Trade and Development

UNDP
United Nations Development Programme

USD
United States (of America) Dollar

USDA
United States Department of Agriculture

UWI
University of the West Indies

WIBDECO
West Indies Banana Development Company

WINFRESH
WIBDECO (re-branded)

WTO
World Trade Organisation

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Currency conversion – USD

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EXECUTIVE SUMMARY

1. Introduction

The CARICOM Secretariat embarked on conducting a study targeted towards “Developing an action plan for promotion of a regional agribusiness sector and targeted commodity enterprises – CARICOM,” this is part of the larger Caribbean Integrated Support Programme (CISP) for the promotion of a regional agribusiness sector and targeted commodity enterprises. The project aims at developing a strategic framework for regional agribusiness development, with the intention to promote training and dialogue among national and regional policy makers and relevant private sector stakeholders to advance the agribusiness/commodity development agenda.

The overall objectives of the project are to:

- develop a strategic framework for regional agribusiness development, which includes action plans for targeted commodities
- promote dialogue among national and regional policy makers and relevant private sector stakeholders to advance the agribusiness/commodity development agenda.

The action plans will be used for the promotion and development of two areas: (i) a regional agribusiness sector and (ii) targeted commodity enterprises. The expected outcomes are:

- enhanced policy and technical advice and transition mechanisms provided to decision makers
- development of a framework for facilitated implementation of new arrangements between public and private sectors for developing a viable agribusiness sector
- increased awareness among producers, agro-processors, exporters of opportunities within domestic and regional markets, particularly for targeted commodities
- increased agribusiness investment proposals developed and funded, particularly for proposals that are regional and subregional in scope
- increased coordinated pro-agribusiness policy measures developed/ strengthened and implemented.

The action-oriented recommendations are provided solutions based on the constraints and opportunities identified. These recommended solutions will address the following:

1. upgrading and strengthening commodity value chains to ensure competitiveness
2. integration of viable small and medium enterprises into these value chains; as well as beneficial participation of the poor (as consumers, farmers, agro-processors, and employers) in the process
3. risk management instruments
4. developing/strengthening regional support institutions/services to deal with issues such as food safety and food product and process standards, marketing, finance, and transport.
2. **Fundamental principles**

In order to arrive at the recommended solutions there are some fundamental principles that form the foundation to guide the strategies given the overall strategic goal, vision, mission and strategic objectives. These are as follows:

**Principle 1:** As shown in Table 3.2.1.01. (Section 3.2.) it is estimated that the region has over 1.3m farmers, with Haiti accounting for over 1m farmers distributed in four major categories, marginal, small, medium and large farmers, operating on 1.98m ha (4.95m acres) of land engaged in over 170 commodity enterprises.

**Principle 2:** There are two forms of agriculture practised in the region: industrial agriculture geared towards mainly exports, and agrarian agriculture and marine fisheries with enterprises that have export potential but tend towards consumption. It is within this group that there is strong potential for the region given the four strategic objectives.

**Principle 3:** The value chain system of trading commodities is broker driven, not producer or consumer driven.

**Principle 4:** The production and marketing data and information platform requires substantial investments to facilitate the collection, storage and retrieval to be used in making meaningful decisions.

**Principle 5:** The framework to drive the sector lies in developing public/private partnerships to enhance the production and marketing of the targeted commodities.

3. **Strategic goal and objectives**

Given these five principles, the proposed strategic goal is that within five years the regions’ economies will increase the contribution of the agribusiness subsector to the regions’ overall GDP at an average rate of 3–6% annually by using an enterprise development strategic approach, through the adoption of a balance growth paradigm and the application of producer-driven value chain frameworks to systematically produce and market targeted commodities competitively (see Section 4).

Four strategic objectives are identified to achieve the strategic goal and the development of the agribusiness sector. These are as follows:

- Strategic policy option/objective # 1: Identification of commodity enterprises to enhance food security
- Strategic policy option/objective # 2: Identification of commodity enterprises for competitive import replacement
- Strategic policy option/objective #3: Identification of commodity enterprises to increase export earnings and foreign exchange
- Strategic policy option/objective # 4: Identification of commodity enterprises (particularly indigenous species) for value-added products, tourism market and agrisector stability through increased employment.
4. **General findings and recommendations**

The findings are separated into two areas gaps/challenges and opportunities, the trade agreements and commerce enabling environment, current production and trade flows by country, the foundation for the selection of commodity enterprises and value chain analysis. The recommendation follows highlighting the opportunities on regional and country bases.

The following outline the key findings and recommendations:

4.1 **Gaps/challenges**

- Weak enabling environment infrastructure with intractable administrative guidelines and gaunt civil service support
- General lack of infrastructure to facilitate agricultural development e.g. poor drainage and irrigation – in some cases this is non-existent – and a lack of proper farm roads
- Poor postharvest capability including lack of refrigerated trucks, and poor packing houses, where they are available, leading to a high level of wastage and spoilage, coupled with periods of glut/shortage
- Limited extension service capability resulting in limited and poor data collection and limited servicing of farms
- Need for the development of a comprehensive marketing system to assist stakeholders to have an indication of product availability, prices etc.
- Lack of intra/extra-regional transportation capability thus limiting the development of both intra and extra export trade
- Low level of technology both in agricultural cultivation and agro-processing
- High proportion of small-scale farmers cultivating a wide range of produce and doing so at a low level of productivity
- Shortage of agricultural labour either real or contrived
- Limited information on land availability and land use capability
- Diversion of agricultural land into housing and other construction
- Lack of a comprehensive policy to encourage youth into agriculture and agribusiness as a replacement for the existing aging farmers
- High cost of finance for investment in agriculture and agribusiness as well as limited availability of financial resources for both areas
- Limited research and development in agriculture and processing. A disconnect exists between research and the farming community as there are claims that information is not passed down to farmers
- Supply and cost limitations affecting the development of the processing subsector
- Limited and/or negligible agro-processing throughout the region but more so in the smaller territories, where the majority are engaged in the production of condiments, jams and jellies
- Disconnect between farmers and processors as there is competition between supply for the fresh produce trade and the processing trade
Limited levels of certification both in farming and processing impacting negatively on the ability to get market share in the high end local market and tourist trade as well as the overseas export trade, HACCP, GAP, etc.

Limited product development capabilities in agro-processing as former laboratories have been closed or operate at low levels

High cost of imported inputs-packaging materials and where available of questionable quality resulting in poor product presentation

Need for improved marketing exposure and representation-limited exposure in international marketing

Limited capability to supply tourism sector: irregular supply, low grades and standards, contracts not fulfilled and a general lack of business skills. Farmers are to all intents and purposes not marketers

Gap in private sector involvement-need for emphasis on institution strengthening of existing associations both in farmer groups and the wider national organisations

Trade agreements and policies are skewed towards donor-driven activities solving issues that are external to region and not the core of the regions’ agribusiness sector

With respect to value chain assessment the major difficulty in this process lies in the fact that we are dealing with a sector where the major proportion of the players are small-scale. The other problem is the lack of reliable and up to date information on cost of production and other data at the various value gain points of the chain

Present policy favours primary production with attention given to the small-scale farmers, who are in the majority, so as to achieve the expansion of agriculture.

4.2 Opportunities

A number of possibilities exist both in the area of import replacement and substitution and trade expansion regionally and exports

Greater use of root crops as a replacement for imported white potatoes. Increased production and better postharvest capability to reduce imports of onions. Increased processing of root crops and vegetables

Better utilisation of salad greens and fruit plates to capture high end supermarkets and hotel and tourism trade

Development and expansion of animal feed production, utilising available fish waste and other fruit and vegetable waste with local corn that could result in reduction of costs and expanded livestock production

Many of the smaller tourist dependent countries depend on imported food and herein lies an opportunity for greater regional trade with improved transportation capability and joint ventures in livestock and agro-processing

For the Windward Island greater utilisation of the Geest banana boats to diversify export trade in non-traditionals as well as to use WINFRESH marketing sources to increase exports of non-banana products

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1 Hazard Analysis Critical Control Point and Good Agricultural Practices
• Improved infrastructure – construction of abattoirs, packing houses and improved grading and standards. These improvements could facilitate business with the tourist sector and high end supermarkets
• Government policy to bring about involvement of private sector in farming
• Policy improvements and implementation to establish enabling environment to increase private sector investment
• Reform of the agricultural legislations to facilitate growth within the sector

4.3 Options and opportunities in the existing trade agreements: relevant trade agreements’ impact on intra and extra-regional trade

In this section various trade agreements are examined looking at the challenges and opportunities and how these will impact the agribusiness sector.

4.3.1. Results – integration of the Caribbean Single Market Economy

This report has chosen to address the opportunities under the Caribbean Single Market Economy (CSME) first since it is evident that options in this new era of reciprocal trade would only materialise in a significant manner through regional integration. This idea is not new. Economic integration both intra and extra-regional has been studied and reported on before. Several reports and stakeholders interviewed during the in-country field studies in the region argue that regional integration is necessary to operationalise the EU-CARIFORUM Economic Partnership Agreement (EPA) and reduce trade deficits in the region.

After the creation and development of the Caribbean Community and Common Market (CARICOM), an integration plan intended to coordinate and enhance the collective economic and social development of 15 countries. After three decades of incremental success, CARICOM’s strategy for achieving complete economic integration is now culminated into two phases of implementation of the CSME, formally established on 1 January 2006. The last phase is intended to be completed in 2015. CSME was first envisioned at the 10th Meeting of the Conference of Heads of Government of the Caribbean Community in July 1989 in Grenada. The CSME consists currently of Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago. Most are not hopeful that full integration can occur since CARICOM is a highly trade-dependent region undergoing major changes to its economic relationships with the world. Each country would have to make deeper commitments to integration. While there may be some hesitation to implement the following ideas, the region’s strong dependence on external markets reinforces the rationale for completing the CSME.

Opportunities for intra and extra-regional integration

A summary of the key elements of the CSME can be seen at http://www.caricom.org/spi/single_market/single_market_index.jsp?menu=csme
Extensive treatment of the CSME can be viewed in Towards a single development vision and the role of the single economy by Norman Girvan, University of the West Indies in collaboration with the CARICOM Secretariat and the Special Task Force on the Single Economy as approved by the 28th Meeting of the Conference of Heads of Government of the Caribbean Community (CARICOM), 1-4 July 2007, Needham’s Point, Barbados
CSME must complete an intra-regional and extra-regional integration scheme by harmonising grades and standards, encourage and promote the regional transfer of services and human capital, and pooling resources to build a strong export platform, and integrating to provide efficiency in the delivery of public services.

**Harmonising Standards:** there is a need and opportunity to create harmonised grades and standards to meet international market standards. Most if not all the countries examined in this study had their own mechanisms for implementing standards for food quality and safety. The reoccurring comment received, however, was that in order to increase trade opportunities within the region, agreements would have to be made between member states to harmonise those standards. As members of Caribbean Regional Organisation for Standards and Quality and the Caribbean Food Safety and Animal Health, the region could use these entities as the main mechanism to accomplish this. Not only does the CSME contemplate this kind of synergy but so does the EPA, as discussed below. Regional accreditation in other sectors has been developed, like the Caribbean Accreditation Authority for Education in Medical and Other Health Professions which applies to six member states. Therefore, this kind of integration, while having some constraints, can be done.

**Encourage the regional transfer of services and human capital:** CSME anticipates an improved ability to recruit skilled workers from across the region. Provisions under Chapter 3 of the Revised Treaty permit skilled personnel and low-skilled labourers and their families, as well as business enterprises, to take advantage of job opportunities within the CSME. This is in alignment with many of the investment incentive related policies that several countries within the region have in attempt to promote cross border investments.

**Building a strong export platform:** stakeholders interviewed in during the in-country field studies all expressed extreme interest in setting up an export platform. This platform would go beyond the technical support, and overseas trade shows that exporters receive through various programmes in the Caribbean. This programme, explained in greater detail in the Section 4 of this report, would be operationalised by the region by collectively developing an overseas trading house where goods could be packed and shipped and therefore creating the opportunity to become a direct distributor in the country.

**Integrating to provide efficiency in the delivery of public services:** Unlike Trinidad and Tobago, the rest of CARICOM must import energy: 13 of 15 CARICOM members have signed PetroCaribe Energy Cooperation Agreements with Venezuela for the purchase of oil on deferred payment terms. The region should continue to explore these partnerships through CSME and determine how the region can effectively provide much needed public services, like sanitation, public transportation, and regional healthcare provision.

For the agricultural sector to enhance trade, emphasis must be placed on mitigating the key barriers that continues to marginalize the efforts made so far. These include the need to increase transportation linkages. Signs of these are materialising with (a) the development of the multilateral approach in the development of the Organisation of Eastern Caribbean States (OECS) Trade and Distribution Company spearheaded by the Eastern Caribbean Central Bank; and, (b) the unilateral effort of the country of Dominica to secure cargo vessels to enhance its position in inter-island trade particularly with the French Oversees Departments of Guadeloupe, Martinique and its quest to serve the markets of Antigua and Barbuda, St. Kitts and Nevis, St. Martin, Anguilla and the United State Virgin Islands (St. Croix and St. Thomas) and the British Virgin Islands.
Yet much more will have to be done especially in the areas of air cargo services for both inter-island and international trade. The recent Owen Arthur Report indicated the need for greater integration of Belize, Haiti and the OECS in to the CSME framework. One vehicle that could facilitate this and speed up that area of trade in goods is the implementation of ocean cargo services between the territories. The results have been mixed here, as there is an excellent ocean cargo transportation service between Belize and Jamaica, but problem in providing the services to the Eastern and Southern Caribbean. Case in point during the investigation Belize indicated that they have a standing order of 10,000 metric tonne of corn to be shipped to Guyana with potential market in Suriname, but could not ship the product due to lack of reliable and cost effective ocean cargo services to that part the region.

Haiti presents a special case for integration; however, competitive advantage exists mainly in supplying agricultural workers in a structured Temporary Agricultural Worker Programme.

4.3.2. Selected multilateral and bilateral trade agreements

(1) The Economic Partnership Agreement: EU and CARIFORUM

Under the terms of the EU-CARIFORUM Economic Partnership Agreement (the CARIFORUM EPA), for all products originating in CARIFORUM countries and exported to the EU (other than rice and sugar), the Agreement has brought about a duty and quota free access regime effective 1 January 2008. The CARIFORUM EPA also includes a protocol implementing the UNESCO convention on cultural diversity, and provides CARIFORUM artistes and other culture related services suppliers with opportunities for the temporary movement of persons, and for co-production market access.

The CARIFORUM EPA covers more subject areas than any of the EPAs executed by African, Caribbean and Pacific (ACP) countries. The Agreement covers trade liberalisation of goods, a reciprocal regime for trade in services and investment, regulations on competition policy, public procurement, and intellectual property.

The Agreement is unlike most other free trade agreements in that the purpose has been touted as getting Europe's former colonies in the ACP countries prepared for trade liberalisation through sustainable development and poverty reduction. The intended benefits of the CARIFORUM EPA are to make imports cheaper, eliminate unilateral preferences accorded to CARICOM exports, increase production, increase exports to the EU and as stated in the Agreement. It is presumed that the European Development Fund is a financial protocol put in place via the Agreement to help assist ACP countries in regional integration, improved governance, social development, improved governance, environmental sustainability, and improved trade negotiation tactics and governance. There have been several advantages touted under the CARIFORUM EPA, some of which are: (1) access to the European Union for trading ACP products, including agriculture; (2) the reinforcement of regional integration schemes; and (3) lower prices for capital and intermediate goods.

For purposes of this report, it is important to focus on the following sections of the CARIFORUM EPA:

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3 During the investigation we could not pinpoint the lack of or interest of the Bahamas in such a framework
Regional integration measures set forth in Article 4
Provisions on tariffs (i.e., Article 11 prohibiting the imposition of any trade-related internal taxes and charges other than anti-dumping and countervailing duties)
Rules of origin measures in Articles 15 and 16, and the Protocols (i.e. Protocol 1)
Financial services’ measures in Articles 103-108
Public procurement and market liberalisation in Articles 165-182
15 national schedules outlining the liberalisation of goods over the 25-year implementation period

Overcoming challenges created by the CARIFORUM EPA
In addressing the shortcomings that implementation of the Agreement creates (i.e., cutting import duties, increased international competition), it is significant to analyse them in the context of the purported advantages of the Agreement.

Removal of all tariffs and quotas on Caribbean exports to the EU
One of the purported benefits of the Agreement is the removal of tariffs and quotas per Article XXIV. As many countries in the region rely on these mechanisms for revenue, the benefit would have to be derived from ways to replace this revenue or build a foundation wherein countries would actually benefit from the removal of tariffs and quotas. Full market research would need to be done to predict the actual impact of the removal of these trade mechanisms. It is difficult to hypothesise the short-term and long-term monetary effects that this would pose; however, one idea is to possibly focus on the goods currently protected by very high tariffs, and also focus on goods for which the EU has the greatest supply capacity. A recent report conducted by the Jamaica-based Caribbean Policy Research Institute (CaPRI) and the Centre for International Governance Innovation (CIGI), the study found that, the economic effects on the four countries studied – Jamaica, Guyana, Trinidad and Tobago, and St. Lucia – would probably be minimal, although it will likely produce challenges for smaller Caribbean governments. The report cites that in the case of Jamaica, exports have only increased by 1% while imports have increased by 0.6% leaving the overall effect of the CARIFORUM EPA negligible.4

One would be mistaken to come away from such findings believing that the economic challenges posed by the CARIFORUM EPA are insignificant. There are several points to make. One, the report’s findings signify a very important point, which is that while the Agreement is purported to create sustainable development and “eradicate poverty”, the net effect or trade benefit is miniscule even for some of the more capable, larger economies in the region. Secondly, this report has analysed the data available up to now, which is just the effect of phasing out of tariffs and quotas over the past couple of years. It has not (and realistically cannot) measured the long-term effects to occur over the 25-year implementation period. Further, few studies may be able to compute the other trade-related internal taxes and charges that produced revenues for each country and what the long-term effect of the loss of these revenues could do to their economy. (See Article 11 “prohibiting the imposition of any trade-related internal taxes and charges . . .”).

Opportunity – creating a platform for competitiveness in trade: In addition to the technical assistance to support the removal of these mechanisms in the form of fiscal reform (See Articles 16 and 22), the development provisions of the CARIFORUM EPA emphasize financial and technical support to address the challenges the Agreement

4 Thornburn, David et al., 2010 The Economic Partnership Agreement: towards a new era for Caribbean trade, 6 September 2010 also available at http://www.capricaribbean.org
poses for the region’s public and private sectors, but no provision has identified the specific types of financial and technical resources. Article 135 on competitiveness and innovation facilitates support through diversification programs, promotion of joint investment and ventures, technical assistance, and the promotion of industrial cooperation between economic operators, to name a few. These mechanisms are a just a few of the ways, the Agreement anticipates supporting the initiatives of the CARIFORUM EPA. While still not specific, the language identifies an opportunity for the region to create sustainable import-export platform with the EU, through this notion of “cooperation for innovation” touted in Article 135. To manifest the regional integration provisions of the Agreement, the opportunity would be for the region to unify its efforts to accomplish this. Article 135 calls for support through the promotion of joint investments and joint ventures, diversification of products, and industrial cooperation, which are the key elements of building an export platform for agriculture. This opportunity is explained in greater detail in Section 4.

- Foreign direct investment and new markets for Caribbean companies and professionals to offer services in the EU

Annex 4 of the Agreement lists those service sectors that the parties have identified, which is pretty broad. While the services mainly focused on in the Agreement are subsectors like tourism, the Annex does list agriculture, aquaculture and fisheries. Further, the investment provisions in the Agreement contemplate creating a commercial presence in a third country through the supply of services.

**Opportunity: capacity building through joint venture investments.** The in-country field studies has identified synergies between the Caribbean and the EU in agricultural trade in Holland (i.e., Suriname’s trade relationship is significant) and England. The team identified through various interviews that both countries have a significant amount of individuals from the Diaspora. This niche market has only been marginally capitalised in the agricultural sector. By developing the value-added sector, the team has identified some key strategies in Section 4 that the Caribbean can use to enter third markets. One way to accomplish this, which is encouraged by the language of the CARIFORUM EPA, is by EU companies going into joint ventures with Caribbean companies to develop the value-added sector in a real way. Not only will Caribbean companies benefit from the knowledge of understanding how to operate in EU markets, but there may even be an opportunity to see real and consistent market placement of Caribbean value-added goods in the EU. Legally, there were no major hurdles or hindrances identified in the relevant legal framework as it relates to joint ventures. The only point to raise here is that both Haiti and the Bahamas are excluded from the service and investment chapters.

- **Benefits from the revised rules of origin**

This aspect of the CARIFORUM EPA has been promoted as being extremely important to manufacturers of processed foods and fisheries who import raw material outside of the Caribbean. Those who promote this idea see potential increases in the value-added sector.

**Opportunity: increased exports to the EU.** Many of the stakeholders in the processed foods sector interviewed during the in-country field studies expressed that they already obtain the majority (if not all) of their raw materials from abroad. Further, many of the countries listed have favourable tax incentives and duty exemptions for those producers importing raw materials. However, many interviewees expressed a desire to see the Caribbean scale up their production of the raw materials so that they could stop importing
them from the US and the EU. Until this is accomplished, the rules of origin create an opportunity to export goods to the EU qualifying for preferential market access, as these goods would be considered of local origin. Commentators acknowledge that considerable gains can only be gained here if production in the value-added sector is sufficiently large enough.

- **EPA’s aid for trade and committing to EUR 165m under the European Development Fund (EDF)**

The CARIFORUM EPA identifies resources in a Joint Declaration on Development Cooperation, annexed to the Agreement. The availability of EUR 165m for financing the 10th EDF Caribbean Regional Indicative Programme is complimented by aid for trade contributions by Member States of the EU. Only a portion of funding under the EPA has actually been committed, making it difficult to determine opportunities under the Agreement for the region. Under the EDF’s Regional Strategy Paper, the available funds tend to be focused on regional economic integration and cooperation (including EPA implementation and capacity building). The key is also to have a regional mechanism in place to funnel funding, which is also discussed in greater length in Section 4.

(2) **Caribbean Basin Initiative**

The Caribbean Basin Initiative (CBI) was created in 1983 under the US Government enactment of the Caribbean Basin Economic Recovery Act. The CBI was later expanded in 2000 through the US-Caribbean Basin Trade Partnership Act (CBTPA). In 2009, the World Trade Organisation (WTO) Council for Trade-in Goods approved a waiver request from the US on the CBERA, to remain valid until 2014, which provides the legal authorisation for CARICOM to export goods covered under CBERA to the US duty-free. Under the provisions of the CBI, products made in the Caribbean are granted complete duty-free entry into the US market, provided that at least 35% of the products’ appraised value originated in the Caribbean country (the origin requirement can be reduced to 20% if not <15% of the product value is represented by United States or Puerto Rican content).

**Opportunity:** It has been observed that 64% of all CARICOM exports to the US are not under any preferential trade programme like the CBI. The same data shows that the aforementioned exports benefit from limited import charges and a 0% ad valorem tariff rate. Of these items, agricultural products include lobster, tuna, shrimps, and prawns. Further, there is no provision in the Agreement which explicitly implements US foreign direct investment in Caribbean as it relates to goods covered under CBERA; although much of the textile manufacturing-related foreign direct investment is as a result of the trading environment this Agreement created. Therefore, to say that there is an opportunity for agricultural products, beyond the seafood mentioned above, to enter into US markets under the CBI, is a well understood notion. Furthermore, while not explicitly stated in the Agreement, the opportunities for US foreign direct investment in this sector can also be made available through the trading environment created by the CBI. The only issues revealed in this present study are (1) the market competitiveness with Latin American countries as a result of countries gaining parity with Caribbean countries with respect to access to US markets, i.e. via North American Free Trade Area (NAFTA) or competitive pricing, and (2) the investment laws within the Caribbean which make it easier, or harder for foreign investors to funnel investment in-country.

5 Caldenty, Esteban Perez, 2005. Main Issues, Effects and Implications CEPAL – Comercio International, Export Promotion Policies in CARICOM.
(3) Canada /Caribbean Programme (CARIBCAN)

Enacted in 1986, the Canada-Caribbean programme (CARIBCAN) is a preferential trade agreement that, along with the General Preferential Tariff and Most Favoured Nation status, extends duty-free access to the Canadian market for 96% of imports from CARICOM. Commodities excluded from CARIBCAN include certain agricultural products as well as some textiles, clothing and footwear. The only members excluded from CARIBCAN are Haiti and Suriname. Products manufactured or assembled in CARICOM can be exported to Canada free of customs duties. In certain countries, at least 60% of the ex-factory price of the product must originate in Caribbean country or Canada, making the country's input potentially low and still qualified for duty-free entry if the Canadian raw material input is very high. Canada and CARICOM are also party to a Trade and Economic Cooperation Agreement, which serves as a framework for bilateral cooperation and discussion.

In 2007, Canada contributed over CAD 2 billion in development assistance to CARICOM. In 2008, bilateral trade between CARICOM and Canada was approximately CAD 2.5 billion and total Canadian exports were valued at CAD 906.5m, which was surpassed by CAD 1.6 billion in imported goods from CARICOM. Trinidad and Tobago receives the majority of Canada’s exports, the Bahamas accounts for the second largest portion, and Jamaica also receives a large portion of Canadian exports to the region.

Opportunity: main imports into Canada from CARICOM in 2008 were rum and tafia with a value of CAD 23m or 38.9% of total agrifood imports, fresh papayas at CAD 7.1m or 12.1%, beer made from malt at CAD 3m or 5.1%, undenatured ethyl alcohol at CAD 2.7m or 4.6%, and sweet potatoes at CAD 2.5m or 4.3%. In light of this data and the enabling rules of origin provisions in the CARIBCAN program, there appears to be an opportunity to not only scale up production of processed foods, but also, explore opportunities to expand joint venture investments between Caribbean and Canadian companies in agribusiness surrounding the types of agricultural products already being exported to Canada (i.e., papayas, sweet potatoes, etc.).

Further, the private sector can and should take advantage of the Caribbean Diaspora and cultural presence in Canada. The same can be said for the US market. This presents (and always has) a great opportunity to get value-added products into this third market. However, as mentioned earlier, sustained market placement into Canada will require more than introductions into overseas trade shows. As discussed in the strategies portion of this report in Section 4, the actual presence of Caribbean regional brokers or overseas trading houses is necessary to successfully penetrate the overseas market.

(4) CARICOM/Venezuela and CARICOM/Colombia Free Trade Agreements

Both free trade agreements with CARICOM allow for the exportation of products without incurring custom duty charges, provided that at least 50% of the export value of the product is local value-added or the final product is classified under a different tariff heading from any of the material inputs. Goods manufactured can use materials from third countries, provided that they result from “a substantial transformation” which results in a different product characterized by being classified with a “harmonised system” heading which is different from the raw materials.

The provisions in both agreements address trade promotion in that the parties agree to establish trade promotion programmes and facilitate, organise, and execute official and
private activities, fairs, and expositions, conduct market studies, and facilitate an exchange of information. The provisions also address financing trade between the parties. Lastly, the agreement anticipates trade in services for the development of both economies.

**Opportunity:** Duty-free CARICOM exports to Venezuela include slips and cuttings of citrus and ornamental plants, trees, shrubs and plants of edible fruits, rose bushes, live orchid, citrus, and coffee plants, pepper (including crushed and ground), ginger, nutmeg, and ice cream and similar products. Duty-free CARICOM exports to Colombia include preserved fruits, nuts, jams/fruit jellies, coffee (includes un-roasted), papayas, fresh and dried bananas, cashew nuts, coconuts, fish fillets (frozen), lobster, fish meat (minced or frozen), pepper sauce, red kidney beans, other sauces, condiments (excluding tomato ketchup and mayonnaise), ice cream, bottled purified water, aerated beverages, beer and stout, rum, bitters, other alcoholic preparations, essential oils, wood in the rough and sawn state, non-coniferous wood, wooden statuettes, wooden handcrafts, baskets and articles of basket work, wicker work, wooden office and kitchen furniture.

As mentioned with respect to the CARIBCAN agreement, the enabling rules of origin provisions present an opportunity to not only scale up production of processed foods, but also to explore opportunities to expand joint venture investments between Caribbean and Venezuelan and Colombian companies in agribusiness surrounding the types of agricultural products already being exported to these Latin American countries. Additionally, public/private partnerships could also facilitate the agreement’s commitment to trade finance.

It is also worth mentioning that at the time of the submission of this draft report, the Guyana and Venezuelan governments entered into a USD38m agreement secured by Guyana’s president and signed by its Minister of Agriculture, Mr. Robert Persaud and Venezuela’s Minister of Food Production for shipments of rice paddies to commence in October consisting of 50,000 tonnes of paddy at a cost of USD420 per tonne and 20,000 tonnes of white rice at USD700 per tonne. The agreement is expected to attract revenue to the industry. This type of regional arrangement helps to illustrate the regional integration intended to strengthen trade relationships and overcome challenges that the new era of trade liberalisation will bring.

**(5) CARICOM/Dominican Republic and CARICOM/Costa Rica Free Trade Agreements**

This free trade agreement with the Dominican Republic, entered into in 2001 (along with the Framework Agreement in 1998) creates a reciprocal trade agreement with CARICOM more developed countries (MDCs): Barbados, Guyana, Jamaica, Suriname, and Trinidad and Tobago; and a reciprocal trade relationship with CARICOM less developed countries (LDCs) post-2005. The agreement provides for the elimination or the phasing out of duties on all goods except for those which might be identified as “sensitive”.

The Protocol to the Agreement lists a selected group of agricultural products, which would normally be traded duty-free, that are subject to most favoured nation duty rates in periods of glut in order to “avoid the adverse effect of demand on local production resulting in serious losses to producers/farmers.” The Protocol also addresses the free movement of investments and business persons between the territories.
The CARICOM/Costa Rica Free Trade Agreement, signed in 2003, provides for free trade or preferential access for a wide range of products. Like the agreement with Dominican Republic, some sensitive products have been excluded. A special list of products will be granted differentiated market access between Costa Rica and each of the CARICOM MDCs, with a reciprocal trade relationship under the Agreement. CARICOM LDCs and those in the OECS benefit from duty-free access for exports to Costa Rica and are not required to grant similar access to Costa Rican products. CARICOM MDCs, such as Barbados, Guyana, Jamaica, Suriname and Trinidad and Tobago, in turn, provide duty-free access to most products from Costa Rica. The Agreement contains provisions for the settlement of disputes, the application of anti-dumping measures and for the parties to enhance their sanitary and phyto-sanitary measures. The agreement also provides for a review of the trade agreement by parties to consider inclusion of provisions on trade in services, investment, competition policy and government procurement.

**Opportunity:** Please see sections above for opportunities under this Agreement.

(6) CARICOM/Cuba Trade and Economic Cooperation Agreement

The CARICOM/Cuba Trade and Economic Cooperation Agreement was signed in 2000. While not fully enforced, the Agreement was provisionally applied on a bilateral basis between Cuba and the six CARICOM member states, (Belize, Guyana, Jamaica, St. Kitts and Nevis, St. Vincent and the Grenadines, and Trinidad and Tobago) which have completed the internal measures to give effect to the Agreement. This Agreement also provides duty-free access to certain goods. Agricultural goods include, meat, fish, shrimp, milk, peas, melons, ginger, nutmeg, curry, wheat, flour, coconut, sugar, cocoa, fruits, juices and concentrates to name a few.

**Opportunity:** Please see sections above for opportunities under this Agreement.

(7) ALBA/TCP: Bolivian Alternative for the Americas and the Caribbean

The Bolivian alternative for the Americas (ALBA in Spanish) is a project to counteract the US-backed Free Trade Area of the Americas. The People’s Trade Agreement (TCP) is to promote regional integration among Latin America and the Caribbean. Born out of initial agreements forged between the governments of Venezuela and Cuba in December 2004, it involves cooperation pacts covering a wide range of areas such as energy, health and culture. Latin American member countries are: Cuba, Venezuela, Nicaragua, Ecuador, and Bolivia. CARICOM members are: Antigua and Barbuda, Dominica, and St. Vincent and the Grenadines. Guyana joined this summer as an observer. Various other countries involved through the institutional components of ALBA are: Argentina, The Bahamas, Belize, Brazil, British Virgin Islands, Colombia, Ecuador, Grenada, Guyana, Jamaica, Montserrat, Paraguay, Saint Lucia, St. Kitts and Nevis, Suriname, Turks and Caicos Islands, and Uruguay.

**Opportunity:** To promote development and integration. During summer 2010, the Guyana and Venezuela entered into an ALBA funded agreement to execute a feasibility study, and the environmental impact study of the proposed Venezuela-Guyana road link from Georgetown to Tumeremo. The Caribbean Development Bank (CDB) is responsible for the selection of consultants. CDB will act as the conduit for the resources for the conduct of the pre and feasibility studies on the proposed road link. Other opportunities like this, as well as the trade promotion activities mentioned above, are options under this relationship.
(8) Belize/Guatemala Partial Scope Agreement

The Belize/Guatemala Partial Scope Agreement (PSA) is a bilateral agreement between Belize and Guatemala which was came into effect in April 2010, when the Guatemalan President had recently issued a decree to that affect. The Agreement allows for the bilateral trade of 150 specified products and specifies automatic elimination of tariffs by 50% and 100% which fall under a particular category. Under this category, Belize will be able to sell at preferential tariff margins to Guatemala products such as: tilapia, yellow maize (up to 20,000 metric tonnes at 0% duty), black beans (up to 875 metric tonnes at 0% duty), rice, toilet paper, doors, windows, wooden and wicker furniture, matches, most citrus fruits and concentrate, mangos, guavas, watermelons, pineapples, plantains, among others. The agreement also provides for Belize to gradually eliminate its tariffs it charges on Guatemalan imports by 50% and 100% over three years for those products categorised. Lastly, the Agreement provides for a gradual elimination of Belize’s tariffs on Guatemalan imports by 50% and then 100% over a five-year period is contained in the last category.

A certificate of origin is required when preferential tariff treatment is claimed, which will be determined by Belize’s Custom and Excise Department for exports to Guatemala. The rules of origin provisions provide that to qualify for origin criteria, goods have to be wholly produced or substantially transformed.

Opportunity: Guatemala currently imports products from the US, Nicaragua, and Ecuador that they have identified can be imported from Belize. The agricultural products include: orange juice (spirited, sweetened or unsweetened, and frozen), kidney beans, fresh fish, livers and roes, frozen shrimps and prawns, in shell or not, fish, crustaceans, molluscs, aquatic invertebrates, meat and edible meat offal, live poultry, live swine, bovine animals, and maize. With the additional provisions in the Agreement which provide for trade in services, investment, and trade via roads, there is a good opportunity to explore some of the trade options described in the previous sections.

4.4 Country Summaries: Statistical Review by CARICOM Member States

SUBSECTION A: BAHAMAS

Land use by agricultural holders: Agricultural Census Report, 1994

The number of agricultural holders or farmers as recorded in the 1994 Agricultural Census was 1,760 utilising a land area of 20,335 ha. Given the number of changes in land use since 1994, the data recorded in the 1994 Agricultural Census do not present a reliable estimate on the number of active farms and associated land area used for agricultural purposes in 2010.

The Ministry of Agriculture Farmer’s Registration database includes 856 farmers in 2006 with a farming area of 2,438 ha. A comparison of this data to the 1994 Agricultural Census indicate that the registered farm population of 856 in 2006 is approximately 49% of the 1,760 farmers recorded in 1994. Similarly, the land area of 2438 ha operated by the registered farmers in 2006 is only 12% of the land area of 20,335 ha in 1994.
Crops, meat, livestock and fish production

**Fruit production** increased from 1.8m kg in 2005 to 2.0m kg in 2008; an increase of 12.1% or an annual growth rate 3%. The dominant crops in this subsector are scarlet plum, pineapple and which account for 69.6% of total output over the period 2005–2006.

**Citrus production** increased from 8.2m in 2005 to 8.9m kg in 2008 resulting in an increase of 8.9%.

1. **Major tree crops** increased from 9.5m in 2005 to 10.6m kg in 2008; an increase of 12% or an annual growth rate of 3%. The major crops in this grouping were banana, mango and coconuts which accounted for 84.6% of total output.

2. **Vegetable production** increased from 9.6m kg in 2005 to 10.8m kg in 2008; resulting in an increase of 12.4% over the period. Four crops, water melon, pumpkin, tomato and cabbage account for 87.6% of total output.

3. **Meat production** increased from 3.4m kg in 2004 to 5.2m kg in 2008 registering an increase of 42.3% or a growth rate of 8.4% per annum over the reference period. Poultry production contribution to total meat output was 94.2% whereas pork was 3.9%.

4. **Fish production** exhibited a continuous decline over the period moving from 5.1m in 2004 to 4.5m kg in 2008 resulting in falling output of 11.8% over the period or a declining production rate of 2.4% per annum.

Trade flows

1. **Total food exports** increased from EC$212.5m (USD78.7m) in 2004 to EC$222.9m (USD82.6m) in 2008 resulting in an increase 4.9%.

2. **Two (2) export food Items account for 94.2%** or EC$174.5m (USD64.6m) of the value of food exports in 2008. These commodities include frozen spiny lobsters tails and fresh or chilled spiny lobster tails with export values of 78.0% and 16.0% of the total value of food exports in 2008.

3. **Export of food items** to the North American countries accounted for 56.5% of total annual food exports as compared to 39.5% for European countries. The United States and France accounted for more than 90% of trade in each economic zone.

4. **Food imports** during the period under review declined from EC$936.4m (USD346.8m) in 2005 to EC$602.3m (USD223.1m) in 2008; a significant decrease of 35.7%.

5. **A review of the trade data** by economic trading zone for the period 2005–2008 indicated that the North American Trade Zone was the preferred market and controlled 96.9% of the market as compared to 1.6% and 1.2% for the European and South American countries. The CARICOM countries' total market share was minimal and amounted to 0.2% of total trade over the reference period.
SUBSECTION B: BARBADOS

Principal agricultural characteristics, Ministry of Agriculture Survey, 2006

1. The area under agricultural crops was estimated at 13,422 ha in 2006 with an agricultural holding population of 13,672.

2. The number of agricultural holdings declined from 17,178 in 1984 by 3,506 or 20.4% during the two periods; and

3. The area under agriculture in 2006 increased by 4,697 ha or 53.8% when compared to 8,724 ha utilised by agricultural holders in 1984.

Crops, meat, fish and livestock production

1. **Vegetables:** Production in this sector decreased by 22.9% in 2009 as compared to production levels in 2004. This subsector includes 11 crops of which cucumbers and tomatoes account for 43.2% of the total vegetable production during the period 2004–2009. Five crops, namely okra, sweet pepper, cabbage, carrot and lettuce account for 40.2% of the vegetables produced.

2. **Root crops:** This group includes six crops of which sweet potatoes and yams account for 69.8% of total root crops production. Two crops, namely cassava and onion account for 26.1% of root crops output. Production in this sector decreased by 3.1% in 2009 as compared to production levels in 2004.

3. **Condiments:** Production in this sector decreased by 15.7% in 2009 as compared to production levels in 2004. Three crops, namely chive, thyme and hot peppers, account for 87% of production.

4. **Meat production:** This subsector includes production estimates for chicken and pork which accounted for 96.7% of total meat output during the period 2004–2009. Chicken share of total output was 82.2% whereas pork was 14.7%. Total production increased from 15.6m kg in 2004 to 17.7m kg in 2009; an increase of 13.4% over the six year period.

5. **Livestock production:** This sector includes milk and egg production. Production of milk increased from 6.6m kg in 2004 to 7m kg in 2009 and recorded a marginal increase of 5.9%. Table egg production also recorded a marginal increase of 3.8% with output increasing from 1.9m dozens in 2004 to 2m dozens in 2009.

6. **Fish production** increased from 1.7m kg in 2004 to 2.7m in 2009; an increase of 55.3%. A further review of the data revealed that flying fish accounted for 58.2% of total fish output over the period as compared to 22.4%, 8.2% and 3.8% for Dolphin, Tuna and Bill Fish respectively. These four fish types account for 92.2% of the total fish production during the period under review.

Trade flows
1. Food exports increased from EC$117.7m (USD43.6m) in 2004 to EC$150.3m (USD55.7m) in 2008 resulting in an increase of 27.7% or an annual growth rate 5.6%.

2. 28 or 10.6% of the items exported account for 95.2% of export earnings during the period 2004–2008.

3. Three commodities, namely raw cane sugar, not containing added flavouring or colouring matter; margarine, excluding liquid margarine; and sweet biscuits account for 67.3% of export revenue for food items.

4. Three commodities of which durum wheat flour; chicken sausages; canned and imitation lard and lard substitutes (shortening represent 9.7% of export earnings during the period under review; and

5. The value of food exports to the CARICOM accounted for 46.4% of total exports whereas the European and North American Region accounted for 47.3% and 5.5% respectively.

6. The food import bill increased from EC$458.9m (USD170m) in 2004 to EC$660.5m (USD244.6m) in 2008; a significant increase of 43.9% over the period.

7. Cereals and cereal preparations, vegetables and fruit, dairy products and birds’ eggs and meat and meat preparations accounted for 62.5% of food imports during the period 2004–2008.

8. The major trading or economic zone for food imports during the period 2004–2008 was North America, which accounted for 59.0% of the market share. The CARICOM region was the next major market and accounted for 17% as compared to the European and South American zone with market shares of 13.0% and 8.0% respectively.

**SUBSECTION C: BELIZE**

**Area harvested by type of crops 2004–2009**

The area of land from which crops were harvested increased from 73,904 ha in 2004 to 85,970 ha in 2009; an increase of 16.3% over the period under review. The following is a summary of crops harvested:

1. A total of 24,300 ha of sugarcane was harvested in 2009 and accounted for 32% of the total area cultivated.

2. Total citrus accounted for 18,000 ha and represented 21.0% of the total crop area in 2009. A review of the citrus area harvested increased by 22.5% between 2004–2009.
3. Pulses and grains were harvested from a total land area of 39,500 ha in 2009 and accounted for 45.9% of the total crop area harvested. The area harvested in this subsector increased from 29,300 ha in 2004 to 39,500 ha in 2009; a significant increase of 34.7% over the period. In this subsector corn accounted for 15,300 ha in 2007 and represented 38.7% of the total land area harvested or 16.5% of the national area in 2009. Other significant crops harvested in this subsector were white corn, rice, sorghum and red kidney beans with areas of 7,200 ha, 4,600 ha, 5,300 ha and 3,800 ha in 2009.

Crops, meat, fish and livestock production

1. Sugarcane production recorded a decrease of 14.7% between 2004–2009; from 1,150,000 tonnes in 2004 to 980,000 tonnes in 2008.

2. Citrus production inclusive of oranges, grapefruits and limes increased from 563.8 m kg in 2004 to 647.6 in 2008 an increase of 15%. Oranges and grapefruits account for 80% and 20% of production in this category.

3. Fruit production in this grouping was 68.2 m kg in 2008 and exhibited a decline of 7.2% when compared to 73.5 m kg in 2004. Papaya production accounted for approximately 80.0% of total output. Other significant crops in this category were pineapple, watermelon and mangoes which accounted for 13.0% of production 5.4%, 4.5% 4.5% and 3.1% respectively.

4. Corn production peaked in 2007 at 84.5 m kg as compared to 76.4 and 65.3 in 2005 and 2008. Production of this commodity accounted for 52.8% of output in this subsector.

5. Rice production in 2008 was 26.0 m kg and represented an increase of 10.4% when compared to output of 23.5 m kg in 2004.

6. Vegetable production was estimated at 13.9 m kg in 2004 and represented an increase of 44.0% when compared to 9.3 m kg in 2004.

7. Beef production was estimated 1.6 m kg. Production of this commodity is almost constant over the period 2005–2008.

8. Pork production in 2004 as reported at 0.8 m kg. The period 2005–2008 production was more or less constant and was estimated at 1.1 m kg for each year.

9. Poultry production annual average was estimated 13 m kg. Production of this commodity is almost constant over the period 2004–2007. Production in 2008 declined by 2.8% to 12.6 m kg as compared to the average output over the period 2004–2008.

10. Shrimp production during the period 2004–2006 was estimated at 7.7, 7.3 and 8.4 m kg respectively. The succeeding years 2007 and 2008 recorded dramatic declines to 2.5 and 2.3 m kg respectively. Production for these periods represented 30% and 27% of the peak production of 8.4 m kg in 2006.
11. **Fish production** increased from 0.8m kg in 2004 to 1.9 in 2008, a significant increase of 122%.

**Trade flows**

1. The value of exports in 2008 was EC$479.7m (USD177.7m) and represented a decline of 1.3% as compared to EC$485.8m (USD179.9m) in 2004.

2. Three commodities namely, frozen orange juice, concentrated, raw cane sugar, not containing added flavouring or colouring matter, and fresh bananas account for 68.4% of the total value of food items exported in 2008. Export values for these commodities were recorded as 27.5%, 21.3% and 19.8% respectively.

3. Three additional commodities with export values ranging between 6–7% accounted for 19.4% of export earnings in 2008. These commodities were papaws (papayas), fresh, shrimps and prawns, frozen and concentrated grapefruit juice, of a Brix value not exceeding 20.

4. A review of the food exports by economic zone indicates that the European Union, North America and the CARICOM region accounted for 43.1%, 40.7% and 10.9% respectively of trade during the period 2004–2008.

5. Total imports of food increased from EC$147.5m (USD54.6m) in 2004 to EC$216.8m (USD80.3m) in 2008, an increase of 47.6%.

6. Imports of dairy products, cereal and cereal preparations, feeding stuff for animals and miscellaneous food preparations accounted for 77.8% of food imports with shares of 20.5%, 18.7%, 16.0% and 22.6% respectively.

7. Food imports by economic zone indicate that the North America and South America or the Latin market account for approximately 80% of the value of trade with market shares of 49% and 31% respectively during 2004–2008. The CARICOM market share over the period was 3.4% of total food imports.
SUBSECTION D: GUYANA:

Land area harvested in 2006

The total land area harvested in 2006 was estimated at 206,908 ha of which the major export crops of rice and sugarcane accounted for 89.1% of the total area harvested with contributions of 66.3% and 22.8% respectively. The area under permanent crops was 19,938 ha and accounted for 9.2% of the total land area harvested whereas temporary crops were estimated at 3,488 ha or 1.7% of the land area harvested in 2006.

Agricultural production by crop type 2003–2007

Food crop production in Guyana has exhibited, in the main, a steady decline over the period 2004–2008.

1. **Rice production** in 2008 was estimated at 446,500m tonnes and represented a decline of 10.9% when compared to 500,900m tonnes in 2008.

2. **Sugarcane production** in 2008 was recorded at 2,887m tonnes and realised a decline of 3.8% as compared to 3,003m tonnes in 2004.

3. **Citrus production** in 2008 was 7.1m kg and represented a decline of 17.7% when compared to 7.6m kg in 2003.

4. **Green vegetable** production in 2008 was 22m kg and signified an increase of 12.2% when compared to 19.7m kg in 2004. The crops include bora, okra, cucumber, squash, tomato, pumpkin and account for 70% of production with shares of between 10 to 20% of total output.

5. **Ground provisions** production in 2008 was 27.4m kg and recorded a decline of 27.6% when compared to output of 37.8 thousand kg in 2004.

6. **Meat production** includes **production of beef, pork and broiler meat**. Total meat during the period declined by 4.5% over the period 2003–2007. Broiler output declined from 24.3m kg in 2003 to 23.2m kg in 2007.

7. **Production of fish and shrimp** declined from 51.5m kg in 2004 to 41.2m in 2009; recording a production decline of 20% over the period.

Trade flows

1. The total value of food exports in 2008 was EC$828.4m (USD306.8m) and represented an increase of 29.2% as compared to the EC$641.2m (USD237.5m) in 2004.

2. Four food items account for 84.2% of the export earnings in 2008. These items are cane sugar, other white rice, frozen shrimps and prawns, and other parboiled rice.

3. The European Economic Zone accounted for 50.7% of trade during the period 2004–2008. The CARICOM region was next with a market share of 29.5%
followed by the North American, South America and the Asian block with contributions of 13.5%, 3% and 0.7% respectively.

4. Food imports during the period under review increased from EC$186.2m (USD69m) in 2004 to EC$428.1m (USD158.6m) in 2008; a significant decrease of 130%.

5. Five commodities account for 45.2% of the food import bill in 2008. The five commodities are milk and cream in powder and granules; or other solid form of <1.5% fat, by weight; other wheat and meslin; milk and cream in powder not containing added sugar or other sweetening materials and seed. These commodities accounted for 23.3%, 10.7%, 4.4%, 4.3% and 3.1% respectively of the value of food imports in 2008.

6. A review of the trade data by economic trading zone for the period 2004–2008 indicated that the North American Trade Zone was the preferred market and controlled 46.7% of the market as compared to 19.6% and 18.1% for the European block and CARICOM region. The South American zone contributed 4.8% as compared to 10.8% for the rest of the world.

SUBSECTION E: JAMAICA

Land use by agricultural holders: Agricultural Census Preliminary Report, 2007

1. 723 ha of the total area utilised for agriculture in Jamaica. This category could be classified as “small farms.”

2. Agricultural holdings with five but <25 ha account for 4,205 or 2.1% of the farm population and utilise 38,887 ha or 11.9% of the land area utilised for agricultural purposes. This category of farms could be classified as “medium farms.”

3. Holdings with 25 but <100 ha are represented by 508 holders or 0.3% of the farm population and operate 23,638 ha or 0.3% of the total land area used for agricultural activities. Farms in this category could be classified as “large farms”, and

4. Holdings with over 100 ha amount to 244 or 0.1% of the farm population and occupy 129,562 ha or 39.8% of the total farm area in Jamaica in 1997.

Crops, meat, fish and livestock production

1. **Total crop production** during the period 2004–2009 increased by 7.3%. A review of the data by subsectors indicates the following principal features.

2. **Vegetables production** in 2008 was estimated at 144.9m kg and represented an increase of 4.6% when compared to 138.5m kg in 2004. The production of pumpkin, cabbage, carrot, tomato, callalo and cucumber account for 78.7% of total production.
3. **Yam production** in 2008 was recorded at 102.3m kg and showing a decline of 25.0% when compared to 136.1m kg in 2004.

4. **Fruits:** This subsector includes nine crops and is dominated by citrus and coconuts which account for 76% of total output during 2004–2009 with production contributions of approximately 43% and 33% annually. The other significant crops in this category are pineapples and bananas with production contribution of 7% each per annum and 5% for horse plantains. This subsector recorded a marginal growth of 1.6% over the period 2004–2009.

5. **Meat production:** This subsector includes production estimates for chicken, pork, beef and mutton with annual contribution to output of 86%, 7%, 6% and 1% respectively. Total production increased from 115.3m kg in 2004 to 119.8m in 2009; a marginal increase of 3.8% over the six year period.

6. **Fish production:** Marine production increased from 9.5m kg in 2004 to 13.2m in 2009; a significant increase of 39%. Inland production also increased but at a lower rate of 19% over the period; i.e. moving from 4.2m kg in 2004 to 5m in 2009.

**Trade flows**

1. The value of total food exports in 2008 was EC$693.2m (USD256.7m) and represented a marginal increase of 3.6% when compared to EC$668.9m (USD247.7m) in 2004.

2. Sugar as a single commodity accounts for 40.2% of total exports. Coffee, yams and ackee export value account for 20.2% of exports. These four export items account for 60.4% of the food export earnings in 2008.

3. 12 other export commodities contribute to 18.6% of export earnings. Alternatively, 16 items contribute towards just under 80% of export earnings in 2008.

4. The exports of food items by economic zone indicate that the European zone was the dominant trading block with 52.0% of the export market followed by the North America, Asian and CARICOM regions with 26.6%, 10.9% and 9.9% respectively.

5. **Food imports:** A review of the trade data revealed that the food import bill increased from EC$1,422.5m (USD526.9m) in 2004 to 2,403.4m (USD890.1m) in 2008; a significant increase of 69% over the period.

6. Five food items inclusive of durum wheat, seed of maize (corn), other white rice, other cane and beet sugar and herring, alewives, saithe (coley), pollock, haddock, etc. contributed to 24.5% of food imports in 2008. The value of items in this category ranged between 3 but <10% of total food imports.

7. Six food items accounted for 13.2% of food imports in 2008 with values ranging between 2 but <3% of the food import bill in 2008. These items include oil-cake and other solid residues; maize (corn), other than seed; other food preparations not elsewhere specified; snapper, croaker, grouper, dolphin, bangamary; raw cane sugar, not containing added flavouring; hatching eggs, not for breeder stock; and other cheese.
8. 13 food items accounted for 19.9% of food imports in 2008 with values ranging between 1 and <2% of the food import bill in 2008. See Table 9 for further details.

9. The imports of food items by economic zone indicate that the North American zone was the dominant trading group with 58.7% of the market share. The CARICOM region, South American Countries and the European countries accounted for 14.6%, 13.3% and 9.6% respectively.

SUBSECTION F: SURINAME

Agricultural area by crop type 2004–2008

The area under agricultural crops declined from 55,900 ha in 2004 to 49,600 ha in 2008, representing a fall of 11.2%. This data do not include lands under pasture management which was estimated at 17,300 ha during the period 2004–2008.

The cultivation of rice accounted for 85% of the area cultivated, whereas permanent and semi-permanent crops represented 5.6% and 4.1% of the total area cultivated during 2004–2008. Temporary crops accounted for only 2.8% of the land area under cultivation. The following is a summary of the main features of the cultivated land area by cropping subsectors and crop type.

Crops, meat, fish and livestock production

Agricultural crop production increased from 237.2m kg in 2004 to 326.3 kg in 2008 and realised a crude growth rate of 39% over the period. This production was achieved despite an 11.2% decline in the area cultivated during the corresponding periods.

1. Rice production increased from 174.9m kg in 2004 to 182.9m kg in 2008 representing a marginal increase of 4.8%.

2. Permanent crops production increased from 23.3m kg in 2004 to 26.7m kg in 2008; an increase of 14.6% over the period. Citrus production during this period accounted for 58.6% of total output in this subsector.

3. Semi-permanent crops production increased from 47.6m kg in 2004 to 98.7m kg in 2008; a significant increase of 107%. A further examination of the data indicated that banana contribution accounted for 86% of output in this category with production of 35.3 climbing to 88.7m kg in 2008; a very significant increase of 151%.

4. Production of vegetables declined from 21.8m kg in 2004 to 13.8m kg in 2008; a decline of 34% over the period.

5. Root crop production was recorded at 4.1m kg and represented a decline of 26% when compared to production of 5.6m kg in 2004.
6. **Meat and livestock production**: This subsector includes production of beef, pork, poultry, mutton, table eggs, milk and honey. Meat production was recorded at 9.8m kg in 2004 and represented an increase of 23% when compared to 12.1m kg in 2008. Poultry contributed to approximately 69% of total output as compared to 16% and 15% for pork and beef respectively during the period 2004–2008. Egg production in 2008 amounted to 0.5m and represented a decline of 9% as compared to 0.6m eggs in 2004.

7. **Fish production** in 2009 amounted to 25.3m kg and represented a significant increase of 164.2% when compared to 9.6m kg in 2004.

**Trade flows**

1. A review of the export statistics produced by the Agriculture Statistics Division in Suriname indicated that the value of domestic exports increased from EC$146.9m (USD54.4m) in 2004 to EC$225.2m (USD83.4m) in 2008; an increase of 53.5%.

2. The exports of rice, bananas, crustaceans and fish account for approximately 97% of total domestic exports during the period 2004–2008 with contributions of 25%, 21%, 35% and 16% respectively.

3. Bananas’ export value was EC$14.2m (USD5.3m) in 2004 and also recorded a very significant increase of 329% moving to EC$61.2m (USD22.7m) in 2008.

4. Crustaceans on the other hand recorded a decline of 48.3% between 2004 and 2008 with values of EC$75.7m (USD28m) in 2004 declining to EC$39.2m (USD14.5m) in 2008.

5. Fish export value exhibited an increase of 5.2% over the period starting at 20.6% in 2004 and moving to 31.4% in 2008.

6. A review of the direction of trade by economic zone indicates that the non CARICOM Zones account for 87.3% of food imports during the period 2004–2008. The European block accounts for 38.1% of food imports as compared to 24.7% for the North American economic zone. The South American zone, CARICOM region and the “rest of the world” contribution to imports amounted to 15.4%, 12.7% and 9.1% during the period 2004–2008.

**SUBSECTION G: TRINIDAD AND TOBAGO**

**Land use by agricultural holders: Agricultural Census Preliminary Report, 2004**

The area of land used by agricultural holders in 2004 was 84,990 ha and was operated by 18,951 holders. A further review of the data indicates the following main features.

1. Agricultural holdings in the size group 0.5–2 ha amounted to 10,068 or 53% of the holding population and operated 7,480 ha or 13% of the land under agricultural use.
2. Agricultural holdings in the size group, 2–5 ha amounted to 8,128 or 43% of the holding population and operated 30,004 ha or 36% of the land under agricultural use; and

3. Holdings with more than 10 ha accounted for 755 holdings or 4% of the total holding population and operated 42,925 or 51% of the land area utilised for agricultural purposes.

4. The total area under food crops increased from 5,721 ha in 2004 to 9,921 ha in 2008, an increase of 73% over the period. Vegetables utilise 41.7% of the cultivated area whereas pulses and root crops utilise 34.0% and 20.0% respectively.

Crops, meat, fish and livestock production

1. Vegetable production increased from 19.4m kg in 2004 to 20.7m kg in 2008 and recorded a marginal increase of 6.4%.

2. Cereals and pulses increased from 5.0m kg in 2004 to 5.1m kg in 2008; a marginal increase of 1.3%.

3. Root crop production increased from 6m kg in 2004 to 7.6m kg in 2008; an increase of 25.6%. Dasheen, cassava and eddoes accounted for accounted for 95.6% of output.

4. Export tree crops: This subsector includes six crops of which five exhibited a continuous decline over the period. A review of the data recorded declines of 44%, 60%, 51%, 50% and 36% for sugar, oranges, cocoa beans, grapefruit and copra. Coffee bean output increased from 109,000 kg in 2004 to 225,000 in 2008; a significant increase of 106% over the period.

5. Meat and livestock production: This subsector includes production of beef, pork, poultry, mutton, table eggs, milk and honey. Meat production was recorded at 54.4m kg in 2008 and represented a marginal decline of 0.9% when compared to 55.2m kg in 2008. Poultry contributed to approximately 93% of total output as compared to 6.2% for pork and 0.4% each for beef and mutton. Egg production in 2008 amounted to 7m and represented an increase of 26.0% when compared to production 5.6m dozens in 2004.

6. Fish production was estimated at 13.8m kg in 2008 and represented a decline 7.2% when compared to 14.9m kg in 2004.

Trade flows

The value of total food exports in 2008 was EC$493.5m (USD182.7) and represented an increase of 32.0% when compared to EC$373.8m (USD138.4m) in 2004.

1. Six export food items account for 35.6% of the value of food exports in 2008. The value of these items range between 5 but <7% of export earnings. These
commodities include other raw cane sugar; other rolled cereals; other bread and cakes; communion wafers; other cake mix and pig feed prepared.

2. Eight food items account for 22.7% of Export revenue in 2008. These items range between 2 but <5% of the total value of food exports. These items consist of other prepared fats edible; bulgur wheat; groats meal of wheat; peanut butter; mustard flour and meal; other coffee not roasted; flour of maize and oranges.

3. The exports of food items by economic zone indicate that the CARICOM region accounted for 71.8% of the value of trade during the period 2004–2008. The European and North American countries accounted for 14.7% and 10.3% respectively.

4. The value of food imports indicated that the food import bill increased from EC$968.3m (USD358.6m) in 2004 to EC$1,830.9m (USD678.1m) in 2008; a significant increase of 89.1% over the period.

5. Nine imported food items account for 37.0% of food imports. These commodities range in values of 2 but <7% of the food import bill in 2008. These commodities are other wheat and meslin; other animal feed preparations; other food preparation; maize, other (corn); milk, cream in powder unsweetened; other cheese; other raw cane sugar; milk, cream, powder or granules < 1.5 fat and infant food preparations for retail.

6. Fourteen imported food items account for 19.1% of the value of food imports during 2008. The import value of these items ranged between 1 and 2% of the food import bill. See Table 3.2.3.04 for further details.

7. The imports of food items by economic zone indicate that the North American economic zone accounted for 57% of food imports during the period 2004–2008. The South American countries were the second major player and accounted for 16% of the market share as compared to 12.2%, 9.7% and 4.2% for the European, CARICOM and Asian countries respectively.

**SUBSECTION H: GRENADA**

Land use by agricultural holders: Agricultural Census Report, 1995

The area of land used by agricultural holders in 1995 was 14,164 ha and was operated by 18,277 holders. A further review of the data indicates the following main features.

1. Holders classified as “without land” comprised a significant proportion of the population amounting to 5,829 or 31.9%.

2. Holders with no land and with <2 ha were classified as “small farmers”. Holders in this category comprised 92.5% or 11,077 of the farm population and operated 4,533 ha or 32% of the lands identified for agricultural purposes.

3. Holders with between 2 ha but <20.2 ha were classified as “medium sized farms” and accounted for 7.1% or 1,296 of the total population of holders in 1995. This group operated a land area of 5,382 ha or 38% of the land under agriculture; and
4. Large farms were identified as farms with over 20.2 ha. The population of holders enumerated in this was 75 and operated 4,249 ha of land or 30% of the total land area under agriculture in 1995.

Crops, meat, fish and livestock production

1. **Vegetable production** increased from 1,168,200 kg to 1,941,000 kg in 2008; resulting in an increase of 66% over the four year period or alternately an annual growth rate of 16%.

2. **Roots and tubers** production increased from 257,500 kg in 2005 to 275,700 kg in 2008 an increase of 7.1%. Sweet potato, dasheen and yams account for 86% of total output.

3. **Fruit** production in this category is dominated by three crops which account for 84% of total output. These three crops are bananas, golden apples and Julie mangoes with individual contributions to total output of 74%, 6% and 4% respectively. Production in this category increased from 23.3 m kg in 2005 to 25.7 m kg in 2008; an increase of 7.3%.

4. **Meat production** increased from 744,000 kg in 2006 to 987,000 in 2009; resulting in an increase of 32.7% or an annual growth rate of 8% per annum. Poultry production constitutes 72.4% of domestic meat production as compared to 17.2% for beef.

5. **Egg production** exhibited a significant increase of 70% over the period moving from 406,000 dozens in 2004 to 652,000 in 2009.

6. **Fish production** recorded a decline of 6.8% between production of 2.8 m kg in 2004 and 2.4 m in 2009.

Trade flows

1. Food exports earnings decreased from EC$53m (USD19.6m) in 2004 to EC$46m (USD17.0m) in 2008; a decline of 13.4% over the period.

2. Three items namely, other wheat or meslin flour; other yellowfin tuna and nutmeg, account for 73.9% or EC$33.9m (USD12.6m) of export earnings in 2008. The value of these commodities ranged between 15% and 45% of the value of food exports.

3. The exports of food items by economic zone indicate that the CARICOM region accounted for 38.3% of the value of trade as compared to 33.2% and 26.4% by the European and North American countries during the period 2004–2008.

4. The value of food imports increased from EC$135m (USD33.5m) in 2004 to EC$180.3m (USD66.8m) in 2008 and represented a marginal increase of 33.5% over the period.
5. Meat and meat preparations, dairy products, cereal and cereal preparations and miscellaneous food products and preparations account for 72.7% of food imports with individual shares of 24.0%, 16.3%, 14.8% and 17.6% respectively.

6. The imports of food items by economic zone indicate that the CARICOM region accounted for 23.8% of the value of trade during the period 2004–2008 as compared to 43.4%, 18.0% and 13.0% for the North American, European and South American countries.

SUBSECTION I: ST VINCENT AND THE GRENADINES

Land use by agricultural holders: Agricultural Census Report, 1995

The area of land used by agricultural holders in 1995 was 7,200 ha and was operated by 7,380 holders. A further review of the data indicates the following main features.

1. Holders classified as “without land” comprised a significant proportion of the population amounting to 5,829 or 31.9%.

2. Holders with no land and with <2 ha were classified as small farmers. Holders in this category comprised 88% or 6,477 of the farm population and operated 2,812 ha or 39% of the lands identified for agricultural purposes.

3. Holders with between 2 ha but <20.2 ha were classified as “medium sized farms” and accounted for 12% or 875 of the total population of holders in 1995. This group operated a land area of 3,064 ha or 39% of the land under agriculture; and

4. Large farms were identified as farms with over 20.2 ha. The population of holders enumerated in this category was 28 and operated 1,324 ha of land or 18% of the total land area under agriculture in 1995.

Crops, meat, fish and livestock production

1. **Root crop** production increased marginally over the reference period moving from 10.5m in 2004 to 10.6m kg in 2008.

2. **Vegetable production** from 2.9m kg in 2004 to 3.6m kg in 2008 and represented an increase of 25.2% or an annual growth rate of approximately 5%.

3. **Pulses and cereals** production increased from 956,000 kg in 2004 to 984,000 kg in 2008 and recorded a marginal increase of 2.9%. Production in this grouping was dominated by corn and pigeon peas which accounted for 92.6% of total output.

4. **Production of fruits** declined by 17.6% over the period moving from 53.3m in 2004 to 43.9m kg in 2008. Bananas are the dominant crop in this category and accounted for 73.5% of production.
5. **Meat production**: The production of meat increased from 1,337,700 in 2004 to 1,483,400 kg in 2008 and exhibited an increase of 10.9% or a growth rate of 2.2% per annum. Broilers account for 65.6% of production whereas beef and pork contribution were 20.6% and 7.2% respectively.

6. **Fish production** in 2004 was recorded at 813,800 kg and declined to 635,800 kg with production in 2008 resulting in a production decrease of 28%.

**Trade flows**

1. Food exports increased from EC$74.6m (USD27.6m) in 2004 to EC$81m (USD30.0m) in 2008; an increase of 8.4% over the period.

2. Two food export commodities – other wheat or meslin flour, and fresh bananas – account for 51.2% or EC$41.4m (USD15.3m) of food export earnings in 2008. The individual values of these commodities were 25.9% and 25.3% of total food exports.

3. Three items, namely wholly milled parboiled rice in packages of not more than 10 kg; other parboiled rice and dasheens account for 24.4% or EC$19.8m (USD7.3m) of the value of food exports in 2008. These three items account for between 5 but <11% of the value of food exports.

4. The exports of food items by economic zone indicate that the CARICOM region accounted for 64.1% of the value of trade during the period 2004–2008. The European and North American countries accounted for 32.8% and 2.2% respectively.

5. The value of food imports increased from EC$115.0m (USD42.6m) in 2004 to EC$198.3m (USD73.4m) in 2008. This reflected an increase of 72.4% over the period or alternately an annual growth rate of 14.5%.

6. The imports of food items by economic zone indicate that the CARICOM region accounted for 19.4% of the value of trade during the period 2004–2008 as compared to 53.1%, 20.3% and 5.6% for the North American, European and South American CARICOM countries.

**SUBSECTION J: ST KITTS/NEVIS**

**Land use by agricultural holders: Agricultural Census Report, 1995**

The area of land used by agricultural holders in 2000 for St Kitts and Nevis was 6,369 ha and was operated by 3,046 holders. A further review of the data indicates the following main features for St Kitts only.

1. Holders classified as “without land” comprised a significant proportion of the population amounting to 621 or 34.6%.

2. Holders with no land and with <2 ha were classified as small farmers. Holders in this category comprised 93.4% or 1,676 of the farm population and operated 330 ha or 6.5% of the lands identified for agricultural purposes.
3. Holders with between 2 ha but <10.12 ha were classified as “medium sized farms” and accounted for 5.8% or 105 of the total population of holders in 2000. This group operated a land area of 383 ha or 7.6% of the land under agriculture; and

4. Large farms were identified as farms with over 10.12 ha. The population of holders enumerated in this was 14 and operated 4,329 ha of land or 85% of the total land area under agriculture in 1995.

Crops, meat, fish and livestock production

1. Production from tree crops increased from 361.1 thousand kg in 2004 to 423 thousand in 2008 and recorded an increase of 17.1% over this period.

2. Production of Fruits recorded a marginal production increase of 3.1% i.e. moving from 292.3m in 2004 to 301.4m in 2008.

3. Root crop production increased from 324,200 kg in 2004 to 522,300 kg in 2008 an increase of 61.0%.

4. Vegetable production increased from 819,400 in 2004 to 861,700 kg in 2008; a growth rate of 5.0% over the period.

5. Meat production increased from 282,400 kg in 2004 to 318,700 kg in 2008 resulting in an increase of 12.8% over the period. An examination of the data revealed the production of beef and pork accounted for 81.8% of the total domestic meat output with contributions of 43.6% and 38.2% respectively.

6. Fish production was estimated at 44,500 in 2004 and recorded a decline of 8.9% when compared to output in 2008.

Trade flows

1. Food exports declined from EC$32.9m (USD12.2m) in 2004 to EC$2.1m (USD0.8m) in 2008; a significant decrease of 94%. This decrease was directly attributable to the closure of the sugar industry in 2005–2006.

2. Two (2) food export commodities, namely frozen conch and monkeys, account for 81.9% or EC$1,642,300 (USD743,000) of food export earnings in 2008. The individual values of these commodities were 57.9% and 24% of total food exports.

3. The non CARICOM countries accounted for 98% of food exports as compared to 2% for CARICOM countries. The flow of food exports to non CARICOM countries increased from EC$619,300 (USD229,400) in 2005 to EC$1,927,200 (USD713,800) in 2008 and registered a significant increase of 211% or approximately 42% per annum.

4. The value of food imports increased from EC$81.2m (USD30.1m) in 2004 to EC$132.4m (USD49m) in 2008 and represented via marginal increase of 63.1% over the period.
5. The non CARICOM countries accounted for 85.1% of food imports as compared to 14.9% for CARICOM countries. The flow of food imports from non CARICOM countries increased from EC$69.4m (USD25.4m) in 2004 to EC$112.2m (USD41.5m) in 2008 and registered an increase of 61.6% or approximately 12% per annum. Imports to CARICOM countries increased from EC$11.7m (USD4.3m) in 2004 to EC$20.2m (USD7.5m) in 2008; resulting in an annual growth rate 14.3% over the period.

SUBSECTION K: ST LUCIA

Land use by agricultural holders: Agricultural Census Report, 2006

The area of land used by agricultural holders in 2008 was 12,223 ha comprising a population of 9,946 holdings. An examination of the Agriculture Census, 2008 results indicate the following main features.

1. Holders classified as “without land” were recorded as 5,829 and comprised 5% of the Population of Holders.

2. Holders with no land and with <2 ha were classified as “small farmers”. Holders in this category comprised 83.1% or 8,261 of the farm population and operated 3,958 ha or 32.4% of the lands identified for agricultural purposes.

3. Holders with between 2 ha but <20.2 ha were classified as “medium sized farms” and accounted for 16.7% or 1,661 of the total population of holders. This group operated a land area of 6,106 ha or 50% of the land under agriculture; and

4. Large farms were identified as farms with over 20.2 ha. The population of holders enumerated in this was 24 and operated 2,160 ha of land or 17.7% of the total land area under agriculture.

Crops, meat, fish and livestock production

1. Production of export crops declined from 46.9m kg in 2004 to 44.4m kg in 2008 and recorded a decline of 5.2% over this period. This subsector includes three crops, bananas, copra and cocoa. Bananas account for 98% of production in this classification.

2. Production of fruits recorded a production decline of 6.9% i.e. moving from 7.5m kg in 2004 to 7m kg in 2008. The production of breadfruit and grapefruit accounted for 39.4% of output with contributions of 20.2% and 19.4% respectively.

3. Root crop production increased from 1.6m kg in 2004 to 1.7m kg in 2008 resulting in an increase of 5.6%. The production of yams, dasheen and sweet potato account for 95% of total output.
4. **Vegetable production** increased from 1.9m kg in 2004 to 2.8m kg in 2008 and exhibited a growth of 44.5% over the period or alternately a growth rate of just under 9% per annum.

5. **Production of meat** includes poultry and pork which recorded a significant increase 56.8% over the period when compared to output of 769,000 kg in 2004 to 1,205,000 kg in 2008. This significant increase was directly attributable to a 40% increase in the production of poultry between 2007 and 2008.

6. **Fish production** increased from 1.5m kg in 2004 to 1.7m in 2008; an increase of 11.5% over the period. Four species account for approximately 75% of total output. The species are tuna, dolphin, flying fish and king fish with contributions of 29%, 20%, 15% and 11% to total annual output.

**Trade flows**

1. Exports increased from EC$60.8m (USD22.5m) in 2004 to EC$65.8m (USD24.4m) in 2008; an increase of 8.3%. The division classified as “fruits and vegetables” account for 93.4% of food items as compared to 4.7% and 1.1% for miscellaneous food preparation and coffee, tea, cocoa and spices. A further review of the data reveals that bananas account for 85% to 90% of the value of exports.

2. The non CARICOM countries accounted for 95.3% of food exports as compared to 4.7% for CARICOM countries. The flow of food exports to non CARICOM countries increased from EC$58.9m in (USD21.8m) 2004 to EC$62.1m (USD23.0m) in 2008 and registered a marginal increase of 5.5% or approximately 1% per annum. Exports to CARICOM countries increased from 1.9m in 2004 to 3.7m EC in 2008; an increase of 95% or an approximate annual growth rate of 19%.

3. The value of food imports increased from 282.4m in (104.6m USD) 2004 to 293.4m EC (108.7m USD) in 2008 and represented a marginal increase of 3.9% over the period.

4. The non CARICOM countries accounted for 71.3% of food imports as compared to 28.7% for CARICOM countries. The flow of food imports from non CARICOM countries increased from EC$200.7m (USD74.3m) in 2004 to EC$211.6m (USD78.4m) in 2008 and registered an increase of 9.1% or approximately 2% per annum. Imports to CARICOM countries increased from EC$81.7m (USD30.3m) in 2004 to EC$81.8m (USD30.3m) in 2008; resulting in an almost static growth rate over the period.
SUBSECTION L: ANTIGUA/BARBUDA

Land use by agricultural holders: Preliminary report is unavailable

Crops, meat, fish and livestock production

1. **Vegetable production** includes estimates for 12 crops and was estimated at 1,492.9 kg in 2008. The production of tomatoes, carrots and cabbage accounted for 59.8% of total output with production contributions of 22.9%, 20.7% and 16.2% respectively.

2. **Root crop production** includes estimates for four crops and was estimated at 622.5 kg in 2008. The production of onion, sweet potato and cassava accounted for 91.4% of total output with production contributions of 42.1%, 34.8% and 14.5% respectively.

3. **The production of pulses and grains** includes estimates for two crops and was estimated at 363.8 kg in 2008. The production of corn and butternut accounted for 64.8% and 35.2% of production.

4. **Meat production** increased from 436,700 in 2005 to 513,300 kg in 2008. Poultry production accounted for 37.3% of total domestic meat production as compared to 30.0% and 26.2% for beef and pork production.

5. **Egg production** was estimated at 640,600 dozens in 2008 and represented an increase of 15.4% when compared to production of 555,300 dozens in 2004.

6. **Fish production** was recorded at 3,521 kg in 2008 and represented a significant increase of 39.3% when compared to output of 2,527,000 kg in 2004. The production of fish includes 24 species of which seven species account for 83.7% of total output over the period 2004–2008.

Trade flows

1. Exports of food items in 2007 was recorded at EC$619,300 dollars (USD229,400) in 2007 and exhibited a significant decline of 38.2% when compared EC$1,005,800 (USD372,500) in 2005.

2. One food export commodity comprising snapper, croaker, grouper, dolphin, bangamary and sea trout account for 80.6% or EC$499,300 (USD743,000) of food export earnings in 2007.

3. A total of 11 food export commodities or 15.5% of the total number of food items exported account for 99.6% of the total value of food exports in 2007. See Table 3.2.3.01 for further details.

4. The non CARICOM countries accounted for 93.7% of food exports as compared to 6.3% for CARICOM countries. The flow of food exports to non CARICOM countries decreased from EC$1,005,800 (USD372,500) in 2005 to EC$619,300 (USD229,400) in 2007 and registered a significant decline of 38.4% or approximately 7.6% per annum. Exports to CARICOM countries decreased from...
EC$55,600 (USD20,600) in 2005 to EC$46,100 (USD17,100) in 2007; a decline of 17% or an approximate negative annual growth rate of 3.4%.

5. The value of food imports increased from EC$188.5m (USD69.8m) in 2005 to EC$231.5m (USD85.7m) in 2007 and represented an increase of 22.8% over the period.

6. Five items account for 17.7% or EC$41.0m (USD15.2m) of the food import bill in 2008. The values of these items range between 2% but <7% of the value of food imports. These items include other cuts and offal of frozen poultry; other food preparations not elsewhere specified or included; frozen poultry wings and sweet biscuits.

7. 15 items or 2.2% of the number of imported food items account for 20.3% or EC$47.1m (USD17.4m) of the food import bill in 2008. The values of these items range between 1% and 2% of the value of food imports. See Table 3.2.3.03 for further details.

8. The non CARICOM countries accounted for 82.6% of food imports as compared to 17.4% for CARICOM countries. The flow of food imports from non CARICOM countries increased from EC$153.9m (USD57.0m) in 2005 to EC$190.9m (USD70.7m) in 2007 and registered an increase of 24% or approximately 8% per annum. Imports to CARICOM countries increased from EC$34.7m (USD12.9m) in 2004 to EC$40.6m (USD15.0m) in 2008; resulting in an annual growth rate 14.3% over the period.

SUBSECTION M: MONTSERRAT

Land use by agricultural holders: No data available.

Crops, meat, fish and livestock production

1. Vegetable production was estimated at 35,700 kg in 2009 and represented an increase of 46.2% when compared to output of 24,400 kg in 2004.

2. Root crop production was estimated at 11,600 kg in 2009 and represented an increase of 52.3% when compared to output of 7,600 kg in 2004.

3. The production of pulses and grains was estimated at 3,800 kg in 2009 and represented an increase of 46.5% when compared to output of 2,600 kg in 2004.

4. The production of fruits was estimated at 1,800 kg in 2009 and represented an increase of 25.8% when compared to output of 1,400 kg in 2004.

5. Meat production was estimated at 24,000 kg in 2008 and represented a decline of 23.7% when compared to output of 31,500 kg in 2004. The production of beef, mutton and pork accounted for 92% of total domestic output with shares of 43.4%, 24% and 23.7% respectively.
6. **Fish production** was estimated at 30,600 kg in 2008 and represented a decline of 2.7% when compared to 31,500 kg in 2004.

**Trade flows**

1. Exports of food items increased from EC$2,600 (USD1,000) in 2007 to EC$3,700 (USD1,400) in 2008; an increase of 39.9%. There was no export of food items during the period 2004 to 2006. This situation was a direct result of the volcanic eruption of Soufrière.

2. Export of honey as a single commodity account for EC$3,000 dollars (USD1,100) which represents 81% of the total domestic exports in 2008.

3. The CARICOM countries accounted for 94.6% of food exports as compared to 5.4% for the rest of the world. A review of the data revealed that Antigua/Barbuda and Barbados accounted for 68% and 26.6% of food exports in 2008.

4. The value of food imports increased from EC$9.1m (USD3.3m) in 2004 to EC$12.1m (USD4.5m) in 2008 and represented an increase of 33.3% over the period.

5. 56 food items or 13.4% of food items imported account for 74.5% or EC$9m (USD3.3m) of the food import bill in 2008. See Table (a) below for additional details.

6. The non CARICOM countries accounted for 83.6% of food imports as compared to 16.4% for CARICOM countries. The flow of food imports from non CARICOM countries increased from EC$7.4m (USD2.7m) in 2004 to EC$10m (USD3.7m) in 2008 and registered an increase of 33.6% or approximately 6.7% per annum. Imports from CARICOM countries increased from EC$1.6m (USD600,000) in 2004 to EC$2.1m (USD800,000) in 2008; resulting in an increase of 30.6% or an annual growth rate 5.1% over the period.

**SUBSECTION N: DOMINICA**

**Land use by agricultural holders**

The area of land used by agricultural holders in 1995 was 21,146 ha comprising a population of 9,026 holdings. An examination of the Agriculture Census, 1995 results indicate the following main features.

1. Holders classified as “without land” were recorded as 592 and comprised 6.6% of the population of holders.

2. Holders with no land and with <2 ha were classified as “small farmers”. Holders in this category comprised 74.5% or 6,722 of the farm population and operated 4,979 ha or 23.5% of the lands identified for agricultural purposes.
3. Holders with between 2 ha but <20.2 ha were classified as “medium sized farms” and accounted for 24.2% or 2,187 of the total population of holders. This group operated a land area of 8,758 ha or 41.4% of the land under agriculture.

4. Large farms were identified as farms with over 20.2 ha. The population of holders enumerated in this grouping was 117 or 1.3% of the holding population and operated 7,409 ha of land or 35% of the total land area under agriculture.

Crops, meat, fish and livestock production

1. Production of export crops declined from 291,000 kg in 2004 to 136,600 in 2008 and recorded a decline of 36.6% over this period. This subsector includes four crops, of which two namely cocoa and coffee accounts for 81% of output with shares of 39% and 42% respectively.

2. Production of fruits showed a marginal production increase of 4% i.e. moving from 62m kg in 2004 to 66.9m kg in 2008.

3. Root crop production increased from 23.3m in 2004 to 27.2m kg in 2008 and increase of 13.6%. The production of dasheen, yams and tannias account for 92% of total output over the period.

4. Vegetable production increased from 3.9m kg in 2004 to 5.4m kg in 2008 and exhibited a growth of 27.1% over the period.

Trade flows

1. Exports of food items increased from EC$38.6m (USD14.3m) in 2004 to EC$40m (USD14.8m) in 2008 and represented a marginal increase of 3.7%.

2. Food items exported during this period is dominated by the division classified as “Fruit and Vegetables” which account for 94.1% of food items as compared to 3.8% and 2% for miscellaneous food preparation and coffee, tea, cocoa and spices.

3. Banana and plantain exports account for EC$21.5m (USD8.0m) which represent 53.8% of the total domestic exports in 2008. Bananas account for 42.7% of the export earnings in 2008 as compared to 11.1% for plantains.

4. The non CARICOM countries accounted for 70.4% of food exports as compared to 29.6% for CARICOM countries. The flow of food exports to non CARICOM countries declined from EC$27.4m (USD10.1m) in 2004 to EC$25.3m (USD9.4m) in 2008 and registered a decline of 7.6% or approximately 1.5% per annum. Exports to CARICOM countries increased from EC$11.2m (USD4.2m) in 2004 to EC$14.7m (USD5.9m) in 2008; an increase of 31% or an approximate annual growth rate of 6%.

5. The value of food imports increased from EC$64.7m (USD24.0m) in 2004 to EC$100.2m (USD37.1m) in 2008 and represented an increase of 33.3% over the period.
6. The non CARICOM countries accounted for 67.3% of food imports as compared to 32.7% for CARICOM countries. The flow of food imports from non CARICOM countries increased from EC$43.4m (USD16.1m) in 2004 to EC$65.4m (USD24.2m) in 2008 and registered an increase of 50.7% or approximately 10.1% per annum. Imports to CARICOM countries increased from EC$21.3m (USD7.9m) in 2004 to EC$34.8m (USD12.9m) in 2008; resulting in an increase of 63.4% or an annual growth rate 12.7% over the period.
SUBSECTION O: HAITI

Land use by agricultural holders

The area of land used by agricultural holders is estimated at between 1–1.2m ha in 2010 (FAO 2009). Given this general estimate, the area of land utilised for agricultural purposes is estimated at 1.1m ha. A further review of the available data indicates the following main features.

1. 80% of the agricultural holders own and/or operated <2.0 ha. A simple calculation of this statistic indicates that there are 681,600 farmers in this classification.

2. 50% of the agricultural holders own/operated <0.5 ha of land for agriculture. Using this estimate the number of farmers in this group is estimated at 426,000.

3. The average size of holdings is estimated at 1.29 ha.

4. Given the above general statistics the farm population is estimated at 775,000 at the lower end and 930,000 at the upper end. For purposes of this exercise the farm population is estimated at 852,000, which is the average of the upper and lower limits of the farm population estimates.

Crops, meat, fish and livestock production

1. Root crops: This subsector includes estimates on cassava, yam and sweet potato which account for 78.7%, 26.6% and 24.7% of production during the period 2004–2008. A further evaluation of the data revealed that production in 2008 was estimated at 900m kg and represented an increase of 26.1% when compared to 714m kg in 2004.

2. Pulses and grains: This subsector includes estimates on five crops of which maize, rice and dry beans account for 87.4% of total production during the period 2004–2008. A closer examination of the production output of these three crops indicated that maize accounted for 50.1% of total output as compared to 25.9% and 11.5% for rice and dry beans. A further evaluation of the data revealed that production in 2008 was estimated at 441.0m kg and represented an increase of 13.5% when compared to 388.7m kg in 2004.

3. Fruits: This subsector includes estimates on six specific crops and a grouping/comination of unspecified fruits. A review of the production indicate that bananas, mango/mangosteen/guava and plantains accounted for 88.8% of total output in this subsector with individual contributions of 31.7%, 29.7% and 27.4% respectively. A further evaluation of the data revealed that production in 2008 was estimated at 898.0m kg and represented a decrease 4.2% when compared to 937.6m kg in 2004.

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6 UNCTAD 2010 as indicated in the Report Seed Security Assessment in Haiti
7 ibid
8 ibid
4. **Export crops**: This subsector includes estimates on two specific crops, namely coffee and sugarcane. A review of the production revealed that coffee output in 2008 was 35m kg and represented an increase of 20.7% when compared to 29m kg in 2004. A further evaluation of the data revealed that sugarcane production in 2008 was estimated at 1,100m kg and represented a decrease 4.8% when compared to 1,050m kg in 2004.

5. **Meat production**: This subsector includes the production of beef, pork, chicken and goat. Cattle meat/beef and pork account for 84.5% of total domestic meat production with individual contributions of 47.5% and 37.0% respectively. Chicken and goat meat account for 15.5% of output with contributions of 8.8% and 6.7% during the period 2004/08. A further review of the data revealed that total domestic output was estimated at 89.0m kg in 2008 and represented a marginal decline of 0.4% when compared to 89.4m kg in 2004.

### Trade flows

1. Total domestic exports of food was valued at EC$90.1m dollars (USD33.4m) in 2007 and represent an increase of 48.6% when compared to EC$60.7m (USD22.5m) in 2004.

2. Total imports of food items as classified under Section 0 of the SITC Rev 3 Trade classification is valued at EC$1,426.4m (USD528.3m) in 2007 and represented an increase of 41.6% when compared to EC$1,007.3m (USD373.1m) in 2004.

3. Three commodities, namely rice, wheat and palm oil, account for 48.0% of total food imports during the period 2004–2007 and was valued at EC$620.9m (USD230.0m) in 2007 which represented an increase of 29.9% when compared to EC$478.0m (USD177.0m) in 2004.

4. The trade deficit or difference between the value of food imports and exports was calculated at EC$1,336.2m (USD494.9m) in 2007 and represented an increase of 41.2% when compared to EC$976.6m (USD361.7m) in 2004. A further review of the data revealed that the trade deficit declined by 0.1% and 1.9% in 2005 and 2006 prior to escalating 41.2% in 2007.

### 4.5 Commodity chain assessments – commodity enterprise value chains

Table (a) shows that of 35 commodities whose selection was based on the work done by CARDI/IICA/FAO, 12 products were identified for further study and for which value chain analysis is in the process of being undertaken. An additional eight commodities were identified by CARICOM/COTED as representing priorities to satisfy regional needs. The remaining 15 were identified through discussions with the stakeholders in the various territories. The selection was based on strategic national programmes, where in some cases donor funding had been obtained to undertake studies, and the implementation of the countries action plans. The other criterion for selection of these commodities was the desire to satisfy the national strategic objectives of food security, import replacement, export promotion and agro-tourism.
### Table (a) Market feasibility commodities

<table>
<thead>
<tr>
<th>Commodities</th>
<th>Target commodities as per Project Document (See Box 1)</th>
<th>Targeted commodities as per revised Inception Report (See Inception Report)</th>
<th>Suggested commodities as per stakeholders’ input, country work programme and projects (See Surveys and Action Plan Template)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ackee</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Avocado</td>
<td>x</td>
<td>X</td>
<td>x</td>
</tr>
<tr>
<td>Aquaculture</td>
<td></td>
<td></td>
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<tr>
<td>Talapia</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Shrimp</td>
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<td>x</td>
<td></td>
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<tr>
<td>Beef cattle</td>
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<tr>
<td>Black eye peas</td>
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<tr>
<td>Breadfruit</td>
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<td></td>
<td></td>
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<tr>
<td>Carrots as other vegetables</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Cascarilla</td>
<td></td>
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<tr>
<td>Cassava</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Coconuts</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Coco beans</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Corn (maize)</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Dairy cattle</td>
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<td></td>
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<tr>
<td>Dasheen as other root crops</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Goats</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Golden apples</td>
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<tr>
<td>Herbs/spices/condiments</td>
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<tr>
<td>Honey</td>
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<tr>
<td>Hot peppers</td>
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<tr>
<td>Irish potato</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Mangoes (Julia)</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Melons</td>
<td></td>
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<tr>
<td>NT forest product</td>
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<td></td>
</tr>
<tr>
<td>Onions</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Pawpaw</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Pineapples</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Plantains</td>
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<tr>
<td>Poultry</td>
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<tr>
<td>Pumpkins</td>
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<td></td>
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<tr>
<td>Rabbits</td>
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<tr>
<td>Red kidney beans</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Seafood species: tuna, snapper, grouper, mahia-mahia, bangamary, trout,</td>
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<tr>
<td>Sheep</td>
<td>x</td>
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<tr>
<td>Soursop</td>
<td></td>
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<td></td>
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<tr>
<td>Sweet potato</td>
<td>x</td>
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<td></td>
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<tr>
<td>Tomatoes</td>
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<td></td>
<td></td>
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<tr>
<td>Yams</td>
<td>x</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Other vegetables | x | x | x

Table (b) shows the key commodity enterprises represented as top priorities identified by the stakeholders in their respective countries and indicate the countries which will be the main producers in the region. These data should be used to develop the agribusiness sector using a clustered approach with a regional focus.

Table (b) Key commodity enterprises as top priority as per strategic objectives

<table>
<thead>
<tr>
<th>Commodity enterprises</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ackee</td>
<td>Jamaica, Haiti</td>
</tr>
<tr>
<td>Aquaculture</td>
<td>Guyana, Jamaica</td>
</tr>
<tr>
<td>Peas/beans</td>
<td>Guyana, Jamaica, Belize, Haiti</td>
</tr>
<tr>
<td>Root crops</td>
<td>All territories – Specialisation (Guyana, St. Vincent, Dominica, Jamaica, Haiti)</td>
</tr>
<tr>
<td>Cattle/beef and dairy</td>
<td>Belize, Guyana, Jamaica</td>
</tr>
<tr>
<td>Seafood</td>
<td>Suriname, Guyana, Belize, Bahamas, Grenada, Haiti</td>
</tr>
<tr>
<td>Onions</td>
<td>Bahamas, Barbados, St. Kitts</td>
</tr>
<tr>
<td>Tomatoes/carrots</td>
<td>All territories</td>
</tr>
<tr>
<td>Mangoes</td>
<td>All territories especially Jamaica and Haiti</td>
</tr>
<tr>
<td>Sourssop</td>
<td>Grenada</td>
</tr>
<tr>
<td>Pineapples</td>
<td>Guyana, Antigua</td>
</tr>
<tr>
<td>Poultry</td>
<td>Guyana, Barbados, Jamaica, Belize, Trinidad and Tobago</td>
</tr>
<tr>
<td>Sheep/goat</td>
<td>All territories</td>
</tr>
<tr>
<td>Herbs/spices/condiment</td>
<td>All territories</td>
</tr>
<tr>
<td>Cassava</td>
<td>Guyana, Haiti, Jamaica</td>
</tr>
<tr>
<td>Irish potatoes</td>
<td>Jamaica, St. Kitts, Bahamas</td>
</tr>
<tr>
<td>Hot peppers</td>
<td>All territories</td>
</tr>
<tr>
<td>Corn</td>
<td>Belize, Guyana, Jamaica</td>
</tr>
<tr>
<td>Papayas</td>
<td>Belize, Jamaica, Guyana</td>
</tr>
<tr>
<td>Coconuts</td>
<td>Guyana, Jamaica, St. Lucia, Dominica and St. Vincent and Grenadines</td>
</tr>
</tbody>
</table>

Source: Meetings with stakeholders

Some countries have achieved a level of production which places them well on the way to self sufficiency namely Guyana, Jamaica, Belize and Trinidad and Tobago. There is a second group which has the potential to reach self sufficiency namely Suriname and Haiti. Then there is a group of smaller islands (Barbados and Dominica) which is self-sufficient in some commodities and has the potential to export fruits, root crops and vegetables. These exports are primarily targeted to the Eastern Caribbean.

Most of the countries of the OEICS and Bahamas, particularly those that are tourist reliant, are highly dependent on food imports from the USA. While there is surplus of some commodities (e.g., corn and legume grains) available for export from some territories (Guyana, Belize, Jamaica), the lack of available transportation (both air and sea) prevents the development of intra-regional trade. Coupled with this is the reluctance
of many CARICOM countries to import from the region, preferring to buy from North America and Europe.

Table (c) shows the allocation of commodity enterprises based on the allocations to meet the recommended strategic objectives.

**Table (c) Enterprise allocation by end use targets regionally**

<table>
<thead>
<tr>
<th>COMMODITY ENTERPRISES</th>
<th>Strategic objectives/options/criteria</th>
<th>Food and nutrition security</th>
<th>Import replacement</th>
<th>Export income</th>
<th>Indigenous species for stability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Value-added</td>
</tr>
<tr>
<td>Ackee</td>
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<td>x</td>
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<tr>
<td>Aquaculture (tilapia and shrimp)</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Beef cattle</td>
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<td>x</td>
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<td>Black eye pea</td>
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<tr>
<td>Breadfruit</td>
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<td>Carrots</td>
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<td>Cassava</td>
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<td>Coconuts</td>
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<td>Corn</td>
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<td>x</td>
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<tr>
<td>Dairy cattle</td>
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<tr>
<td>Dasheen</td>
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<td>Goats</td>
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<td>Golden apples</td>
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<td>Herbs/spices/condiments</td>
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<td>Honey</td>
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<td>x</td>
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<td>Hot peppers</td>
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<td>Irish potato</td>
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<td>Mangoes (Julie)</td>
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<td>Melons</td>
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<td>x</td>
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<tr>
<td>NT forest product</td>
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<tr>
<td>Onions</td>
<td></td>
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<td></td>
<td></td>
<td>x</td>
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<tr>
<td>Papaw</td>
<td></td>
<td>x</td>
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<td>x</td>
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<tr>
<td>Pineapples</td>
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<td>x</td>
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<td>x</td>
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<tr>
<td>Plantains</td>
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<td>x</td>
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<tr>
<td>Poultry</td>
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<td>x</td>
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<tr>
<td>Pumpkins</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Red kidney beans</td>
<td></td>
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<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Seafood species</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Sheep</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

4.6 Value chain mapping, value chain analysis and competitiveness

For agrarian agricultural commodities in the region several value chains have been mapped (VCM). The issue is a few have been analysed (VCA) to an extent where key value enhanced activity points have been associated with costs, margins/mark-ups and returns on the investment of the value enhanced activities and overall profitability/competitiveness of the commodities. Additionally limited works have been done in demonstrating the relationship of market competitiveness and the value chain activity increments and drivers. Extensive VCM have been done by FAO, IICA, IDB and CARDI. In some cases analyses have been done on a few commodities. On one enterprise (hot peppers) extensive analytical work has been done.9

Due to data insufficiencies, the length of time required conducting comprehensive value chain modelling and developing competitive indices, the accepted methodologies of developing comparative advantage indices (using Domestic Resource Cost and Social Cost benefit) and computable partial equilibrium models were not used in evaluating commodity competitiveness.

For the targeted commodities the VCMs show that the commodity chains are broker driven (not producers or consumers) as determined by the value gain, mark –up levels and margins. Therefore, for this exercise the method employed was to identify the eight key value drivers (see Figure(a)) or value-enhancement or value gain points in order to demonstrate and ascertain: (a) the value-added/activity value gains; (b) the associated costs; (c) margins/mark-ups as the commodity moves through the value chains/value streams, and (d) overall contributions of (value drivers) value gains to the profitability/competitiveness of the commodity as against products supplied from other countries into the destination market (for this study Miami was used as the first point of entry into the North American market).

Applying the Value System Approach where data was available, we were able to compare along the chain, starting with end market information and integrating field production costs, landed unit costs, margins, wholesale prices at the distributor levels up to retail prices at the consumer levels.10 For selected commodities produced in the region

<table>
<thead>
<tr>
<th>Soursop</th>
<th>x</th>
<th>x</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweet potato</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Yams</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

Source: meetings with stakeholders

9 Competitiveness Assessment of the USA – Miami Market for Trinidad & Tobago Habaneros by Nkosi Felix, Govind Seepersad, Ardon Iton, and Ranjit H. Singh
10 It should be noted that the Value System Approach recognises an interconnecting system of value chains at various levels as the product moves through the value stream from farm to fork. In other words value chain analysis can be done at all those different levels and then combine to show the overall value within the system.
we were able to fine tune the value chain maps and demonstrate how they matched up competitively with similar commodities from other regions entering into the North American market (US and Canada).

We were able to employ a competitive gauge system i.e., end market information used by distributors in those markets (Scott, Mitchell and Chase, 2003), this is done by comparing per unit CIF landed prices. These are as follows:

1. **Strongly Competitive** when the landed CIF unit price falls **well within the range** of the five-year weighted average landed CIF unit prices from low season to high season (i.e., market windows). For example, Jamaican pumpkin landed in Miami at CIF price of USD17/50 lb bag is considered strongly competitive as the weighted five-year CIF unit price ranges from USD14–22/50 lb bag of pumpkin (main suppliers Panama and Dominican Republic).

2. **Moderately Competitive** when the landed CIF unit price falls in the **upper band** of the five-year weighted average landed CIF unit price from low season to high season e.g., Habanera hot peppers from the Caribbean (Jamaica, Trinidad, Dominica, St. Lucia and St. Vincent) landed in Miami between USD8–9/10 lb box is considered moderately competitive as the weighted five-year CIF ranges from USD6.50/10 lb box to USD10/10 lb box (main suppliers Dominican Republic and Mexico).

3. **Weakly/non-competitive** when the landed CIF unit price falls **beyond** the five-year weighted average landed CIF unit price from low season to high season e.g., fresh plantains from St. Vincent landed in Miami at USD13/40 lb box as the weighted five-year CIF ranges from USD8/40 lb box to USD10/40 lb box (main suppliers Ecuador, Columbia, Honduras and Guatemala).

We relied heavily on cost of production data/enterprise budgets from Jamaica, Trinidad and the Eastern Caribbean countries of Dominica and St. Lucia). Cost of production comparisons were made against data from Dominican Republic and selected countries from Central and Latin America for hot peppers, pumpkins, plantains, cassava, papaya (pawpaw), mangoes, avocado, ginger, dasheen, breadfruit and coconuts; sweet potato from Homestead, Florida and a few Central American countries, and pineapples from Hawaii. Input costs were collected on key drivers of production to include fertilizer, labour, and packaging material. Freight rates were collected from the major carriers. Data and information were collected through personal communications with first and second stage brokers/distributors. Wholesale prices were collected from various sources to include US Department of Agricultural (USDA) terminal market prices and distributors. Retail prices were collected from various grocery departments of major supermarkets, discount stores and ethnic stores.
Figure (a) Value chain analysis framework in estimating value gains and margins

Source: Sustainable Value Chain System for primary and value-added agricultural commodities, developed by Dr. Samuel Scott, 1999–2001 USDOE/APEC – Energy for Sustainable Working Group – APEC/ASIA

Some 16 VCMs and analyses were done and all yielded results showing that they were broker driven. These are shown in Table (d). Detailed analyses are shown in Section 3.4 of the report.

Table (d) Selected primary commodities and value–added products

<table>
<thead>
<tr>
<th>Primary commodities</th>
<th>Value- added products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hot peppers</td>
<td>Frozen soup pack (root crops)</td>
</tr>
<tr>
<td>Breadfruit</td>
<td>Canned ackee</td>
</tr>
<tr>
<td>Coconut (dried)</td>
<td>Plantation chips</td>
</tr>
<tr>
<td>Pineapple</td>
<td>Coconut water</td>
</tr>
<tr>
<td>Pumpkin</td>
<td></td>
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<tr>
<td>Papaya</td>
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</tr>
<tr>
<td>Sweet potato</td>
<td></td>
</tr>
<tr>
<td>Cassava</td>
<td></td>
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<tr>
<td>Mango</td>
<td></td>
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<td>Avocado</td>
<td></td>
</tr>
<tr>
<td>Ginger</td>
<td></td>
</tr>
<tr>
<td>Dasheen</td>
<td></td>
</tr>
</tbody>
</table>

Source: Caribbean Integrated Support Programme, CARICOM Study, 2010
5. **Key recommendations**

The key recommendations provided are stated as follows:

1. **Addressing the strategic objectives**

   **Commodity enterprises to enhance food security:**

   For the starches and staples, the targeted commodities are sweet potato, cassava, yams, dasheen, rice, maize, plantains and banana. For meat based protein the commodities identified are small ruminants (sheep and goat) and poultry. The possibility exists for other sources to include tilapia, and marine species that could be stored as dried fish e.g., bangamary and shrimp. For vegetables and legume grains these would include the salad vegetables, bora beans, cowpeas and red kidney beans. For fruits the major commodities identified are bananas, mangoes, and pineapples.

   While most countries appear to not have much of an issue with food or nutrition security with abundance of these in the primary state, the issue is if there were to be a major disaster. In that case, as most of the region’s experts have attested, there is the need for products to be transformed into storable products and infrastructure strategically placed to facilitate storage and distribution. In some quarters, there are suggestions that the model used in planning for the development of the placement of the seed bank could also be used for the development and placement of storage infrastructure for products to be considered for food security in event of regional disasters. Another dimension that must be considered is the harnessing and allocation of resources to develop a comprehensive food security programme. The financial resources to fund that programme would require funding for capital development (building and storage), and operating capital for maintenance and distribution when required. A programme that could be looked at as an example is that of the USDA Commodity Credit Corporation programme in purchasing and storing, grains, grain products, and dairy products in the US.

   **Commodity enterprises for competitive import replacement:**

   The majority of commodities championed as competitive import replacements for the region are onions, carrots, small ruminant products, substitutes for wheat flour, rice and poultry in some countries, corn and legume grains. In the case of onions and carrots, while production can be carried out the issue of storage and postharvest infrastructure will be significant. Small ruminants, goats and sheep can be produced competitively but are subject to praedial larceny. In addition, there would be increasing demand for infrastructure for processing, example abattoirs. Also, there is the issue of the need for internal distribution systems and proper marketing arrangements. Some countries, such as Trinidad and Tobago, and Jamaica are leading on this initiative. There are requests for legislation to mandate the use of cassava flour at certain levels to reduce the amount of wheat flour used in manufacturing certain products, e.g., bread. For the other products including rice, poultry, corn and some legume grains, Guyana (rice), Trinidad, Barbados, Guyana and Jamaica (poultry) and Belize (corn, red kidney beans, and cowpeas) could supply these products. The major issues are transportation to facilitate the trading of goods among these territories, competition from third country imports, and inability of Caribbean private sector to develop the desire to do business with others, given the ease in trading with counterparts in third countries particularly the US, based on perceived lower prices and the ease in getting these items.
Commodity enterprises to increase export earnings and foreign exchange:

In satisfying this objective, the major commodities targeted for exports are as follows:

**For third country markets**
- Fruits: mangoes, golden apple, breadfruit, avocado, ackee, plantains, papaya, melons
- Root crops: yams, dasheen, sweet potato
- Vegetables: pumpkin, squashes
- Legume grains: cow pea
- Nuts: dried coconuts
- Marine products: yellow fin tuna, snapper, grouper, trout, shrimp, lobster, conch

**For regional markets**
- Fruits: mangoes, golden apple, avocado, ackee, pineapple, plantains, papaya, melon, banana
- Root crops: yams, dasheen, sweet potato
- Vegetables: pumpkin, squashes
- Legume grains: cow pea, red kidney bean
- Cereal and nuts: corn and dried coconuts
- Meats: poultry and beef

Commodity enterprises (particularly indigenous species) for value-added products, tourism market and agrisector stability through increased employment

In satisfying this objective the commodities identified are shown below:

**Tourism market**
- Fruits: watermelons, pineapples, banana (ripe), papaya
- Vegetables: lettuce, cucumbers, onions, carrots

**Value-added products for export**
- Coconut water
- Canned ackee
- Snacks: banana, plantain and cassava chips, breadfruits
- Frozen sections: dasheen, yams, sweet potato and cassava
- Fruit concentrate and pulps

2. Upgrading and strengthening commodity value chains to ensure competitiveness

In view of the shortcomings stated above and the ensuing gaps in the value chain system it is therefore necessary to identify organisations preferably in the private sector which can act as the key value chain drivers and integrators to be the facilitators in the process and similar organisations which represent and provide the cohesive arrangements necessary for this process.
To enhance the value chain there will need to be two distinct policies regarding the development of the small-scale farmers and one that relates to the commercial ones if the goal of increased production is to be achieved.

Some 16 VCMs and analyses were done and all yielded results showing that they were broker driven. It is the recommendation to ensure a greater stake by the producers that new marketing arrangements are developed particularly for export agriculture. In this case, the recommendation is for the marketing arrangements to include the development of overseas trading houses integrated with domestic suppliers in organisations preferably as Agribusiness LLCs. (See Section 3.3 and 3.4)

3. Integration of viable SMEs into these value chains; as well as beneficial participation of the poor (as consumers, farmers, agro-processors, and employers) in the process

The subsector as a whole in its present composition is in no position to provide the level of technology necessary to create competitiveness, and in addition, accreditation (GAP, HACCP etc.) which is critical for market share, is expensive and cannot be attained unless there is a complete make-over. Attempts to establish producer associations have been made but these associations exist only in name and on paper and are in need of resources to strengthen them and make them functional enough to carry out the proposals which Caribbean Agribusiness Association (CABA) has outlined. In fact, even the CABA needs resources for its operation and if regional governments see this organisation and its national nodes performing a pivotal role in the development of the subsector they will have to provide financial resources equal to those provided to say TTABA.

Processors need assistance to acquire the type of affordable packaging material to enable them to satisfy international standards. This process must be backed by improvements in overall quality of the products which would then improve acceptance in the marketplace.

Here again as is the case of fresh agriculture, the small-scale operators, while in the majority, can be used to satisfy the local market and since their production level is low, they may be best suited for niche markets where their differentiation would attract a higher price but again the emphasis must be on quality and presentation.

On the other hand, a policy must be put in place to assist larger producers to increase productivity and competitiveness and enable them to move to export as many have reached saturation points in the local market. Only with the development of commercial farms can agriculture assume its true role in the development process as a supplier of regular, quality products for both consumers and processors.

4. Risk management instruments

As one of the key binding constraints, this area has been duly recognised as a hindrance to the sector. This is an area that is recognised with initiatives led by the region's governments, IICA and others in addressing programmes to develop risk mitigation instruments for certain types of risks. In the investigation, elements of production,
marketing, financial, and operational risks were identified. In the case of production, flooding and droughts were identified as the key areas of support needed. For marketing/price risk the areas identified were market failures due to unplanned activities by the players in the marketplace for domestic markets, loss of income and returns due to structure of export marketing operations. In all countries except Haiti, the key areas of operational risk were – labour availability, placement and management. It was recognised that although hourly wage rates in agriculture are higher than in tourism, most individuals elected to work in the latter. From observation, these issues could be resolved if there were structured farm worker/guest work programmes implemented in the various countries. It should be noted that in one of the OECS countries there are Haitian farm workers that are engaged in agriculture that is currently solving this issue. For the issues of droughts and floods there are a number of crop insurance models that could be looked at in the US, and other countries, from which adaptation could be done to fit the needs of the Caribbean producers.

5. Developing/strengthening regional support institutions/services to deal with issues such as food safety and food product and process standards, marketing, finance, and transportation etc

Using the Jagdeo Initiative – key binding constraints framework – the following recommendations are offered:

1. **Production Platforms**: there must be clear strategies for the development of the requisite production platforms (means and procedures) within country. Strategies must be clear about what commodities will be promoted, what systems will be in place and what resources will be provided for production on:
   - Government estates
   - Marginal farms
   - Small farms
   - Medium-sized farms
   - Large farms

2. **Agripreneurship and partnerships**: As the realisation becomes clear that the way to the development of agribusiness in the region is the establishment of public/private partnerships, it is only in a few countries that this possibility exists, for example, in Jamaica the private sector continues to play a significant role in agriculture. In other territories, the capacity of the private sector in agriculture is limited and needs to be improved. There are however, some quasi government organisations with a private sector approach that could fulfil this role. For example in the OECS, there is the rebranded WIBDECO\(^\text{11}\) now operating as WINFRESH that is demonstrating the capacity to fill the role of agripreneurship in a structured manner. The low level of entrepreneurialism in enterprise development among smaller firms is quite endemic as to determine what to produce, how to produce, what and how to market, how to sustain these markets, and what is required to reinvest.

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\(^{11}\)West Indies Banana Development Company
3. **Business linkages and attitude:** An assessment of the value chains and for logical extension the value system for the sector, the overall business and professional attitudes must be improved as we seek to do business from production to markets. For example, required cohesiveness in production is required to achieve scale in economics and servicing markets.

4. **Technical capacities:** This must be addressed at two levels (a) enabling environment, where there is the need for clearer and more current legislative administrative guidelines to ensure the facilitation and promotion of opportunities; (b) know-how at the production, product development, postharvest, product transformation and marketing (domestic, regional and international) levels. This requires the various entities to recruit and hire individuals with the skills and competencies to ensure that the key steps from production to markets are implemented with the probability of success.

5. **Transportation linkages**, packing and supporting infrastructure: As there are low levels of items to be traded and weak marketing arrangements, there is not much to drive a sustained transportation network to be developed. In fact, this is one of the main issues that must be resolved. During the investigation, traders in Belize had orders from Guyana for 10,000 metric tonnes of corn but were unable to secure adequate transportation to ship the commodity. Also Belize continues to dump significant volumes of milk that could be used in other markets. Transportation must therefore be linked to the improvement of inland and port infrastructure for both primary and value-added products. There is some resistance to the latter based on studies in the OECS, especially in the case of St. Vincent. Air and sea transportation must be managed to provide better freight rates and volume and market arrangements developed to drive this solution. There are differing views as to what some call logistical vs transportation challenges. In the recent round of discussion what is eminently clear is that whether there is a transportation availability or a logistical issue, importers and exporters requires a service that is reasonably priced and delivers products in a sufficiently short time.

6. **Market arrangements:** Even in the case of poor postharvest handling in Haiti, the region continues to do well when products are available. However, it is on the regional and international levels that these have failed. The solution lies in producer and market integration using value chain systems to develop overseas trading houses. The marketing of primary and value-added foods can be extremely problematic, especially if the exporting entity does not have a presence in the market place. The main demand side issues resulting in market failures are no-payment, slow payment, excessive spoilage claims in the form of credit notes and the inability to plan and respond aggressively to market signals in the areas of market intelligence, trends in volume and price movements, trade issues, food safety and quality issues and the collection of payment. Several approaches have been used, most success of all are (a) the use of an export management company tied to distribution through a broker/distributor, or (b) development of an overseas trading house where the exporters pack and ship to their own company and become a direct distributor in the importing country. The result is the development of an overseas trading house.

One country that has successfully perfected this in the areas of agricultural products (both primary and value-added) is the Israelis through the development...
of AGREXCO\textsuperscript{12} in 1952 (50\% Government owned and 50\% by commodity board. In 2008 Government divested its shares to the private sector), export through the Carmel Brand achieving on average annual revenue of USD\$80,000m on trade volume of 250,000 tonnes of assorted primary produce and valued added food and beverages, meats and cut flowers. In fact, this is almost typical of Jamaica Banana Producers and WINFRESH for banana exports from the region, notwithstanding the existing trade issue and structural nuisances on the supply side. It is recommended that this model be explored for the region, trading in North America, UK and Europe. The following provide information making the case for the development of such and organisation in third country markets through joint venture partnerships with entities that is of the “best-fit” given Caribbean private sector and governments vision, goals and objectives (see Section 4)

7. **Trading in commodities vs. value-added foods and marine products**: Most of the export programmes see a significant amount of products exported as commodities resulting in lower prices and margins, and returns are accompanied with huge credit notes for spoilages. Some countries have started to implement the value-added development of products and distributed in supermarkets, see work done by Trinidad and Tobago Agribusiness Association (TTABA) and NAMDEVCO\textsuperscript{13} in Trinidad and Tobago, WINFRESH/LAP\textsuperscript{14} in St. Vincent and Grenadines, and members of the Jamaica Agricultural Producers’ Association and the New Guyana Marketing Corporation. These initiatives could be the foundation for trade in value-added foods and beverages with higher margins of returns. These products hold one of the best potential to generate significant returns to the region. This requires significant marketing support in the following countries of Bahamas, Barbados, Grenada, St. Vincent and Grenadines, Guyana, and Suriname.

8. **Donor support and arrangements**: During the investigation in most countries the arrangements of bilateral programmes yield results that can be classified as doing what the donor wants, and not what is needed to move the regions’ agribusiness into the 21st Century. For example, significant resources are being spent to facilitate dialogue between various groups towards improving the enabling environment. While this is noble in its effort, based on the Jagdeo Initiative – Key Binding Constraints (JI-KBC) these funds could be better spent to implement programmes that mitigate these constraints. For example, transportation, risk management, market arrangements, etc.

9. **Trade agreements and business partnerships** to seize the opportunities created: there are several trade agreements that create opportunities for the region, for example, the Economic Partnership Agreement (EPA). However, these agreements require an aggressive private sector, and governments that are willing to facilitate the enabling environment. For example, under the EPA these are some of the key opportunities:

(a) Remove all tariffs and quotas on Caribbean exports to the EU except for sugar and rice to be addressed later. The intent is good; however, in practicality some sanitary and phytosanitary (SPS) measures are used to

\textsuperscript{12} Agricultural Export Company

\textsuperscript{13} National Agricultural Marketing Development Company

\textsuperscript{14} Lauders Agro Processors Inc
reduce the flow of products that could be traded in significant volumes and revenues. Case in point is the issue of EU water quality standards being used to hinder the export of marine products to EU countries from St. Vincent and the Grenadines.

(b) Open up new markets for Caribbean companies and professional services in the EU and for young Caribbean professionals to gain EU work experience: during the investigation we were not able to ascertain results in these areas. Stakeholders question the ability to participate effectively in international procurements (i.e., professional services, and material). Haiti, even with its language advantage, was not able to provide inferences or results of young professionals gaining EU professional experience.

(c) The alternatives provided by the stake holders support the following in the form of “aid for trade” framework:

i. Development of peer exchange programmes for professionals within and outside the region. This would benefit most countries but would be more useful for Haiti which suffers from a significant knowledge gap and ignorance due to isolation

ii. Support the creation of a Caribbean Youth Volunteer Corp with a strong emphasis on exposing Haitian youth, to support businesses and institutions to gain work and professional experience

iii. Support the development of a structured Caribbean Agricultural Temporary Workers, with major emphasis on using Haitians and other country workers. This will help to facilitate greater and more productive production of products that can be then traded into the EU

iv. Provide seed capital project finance to be used as guarantees for the facilitation of cross border joint venture, direct investments and selected mergers and acquisitions

v. Provide funding for export platform programmes where cheaper raw material can be transformed in countries with lower energy cost to be traded, e.g., processed and exported root crops, produced in the OECS, shipped to Trinidad and Tobago

vi. Provide funding support for the creation of market stability fund to support the development of overseas trading houses thereby enhancing sustained marketing arrangements in third countries

vii. Provide funding support for the creation of a capacity building, production finance, value-added, and infrastructural funds

The implications for trade and agribusiness at the regional level, subregional and country level rests in developing and implementing solutions as stated above to address the JI-KBCs along with the issues raised above (see Section 3). These must be done at the country level. There are several trade and agribusiness stakeholders (enterprises, institutions) that can play significant roles given the findings on commodities and the opportunities for trade. These are highlighted in Section 3.3 with the key support that they are able to provide the sector.
10. Implementation and Action Plans

In formulating the options there are five fundamental questions that are addressed. These are:

(1) What structure is most appropriate for regional implementation from national and regional perspectives?

(2) What mechanism is practical for the development of the targeted commodities both at the national and regional levels?

(3) How much would be needed, how will the national and regional initiatives be funded and how the funds will be allocated?

(4) How would the regional initiative be linked to the national action plans in terms of resources, implementation and handling of outputs?

(5) How the regional initiative will change what currently exist at the national and regional levels?

Based on the action plans and the requisite funding there is the need for the creation of an Agribusiness Development and Marketing General Fund (see figure below). This has five sub funds. We have adjusted the amounts to fit reasonable requests for funding for five years given the five funds proposed. These are shown in Tables below. This is estimated to be US$0.62 billion over five years. This fund will have five (5) sub components of funding capacity building, production finance, and the development of marketing and sustain support, and for infrastructural development for the programme.

Given the nature of CARICOM Secretariat and its staff in leading this project they would serve as advisors and not implementers, with the Caribbean Development Bank playing its part as a development financier. Against that background there is need to set up a unit or an agency with a focus on coordinating the efforts of governments and the private sector in developing public-private partnerships projects to ensure sustained outputs yielding significant revenues to the various countries. The emphasis is on implementation and less than generation of policy.

Following the structure shown in the following figure, that entity (RICB) should develop an organizational culture that is a hybrid between a regional public organization in its governance and act like a private corporation in its management of projects. It should have a clear understanding that it must work closely with the various ministries, CARDI and IICA and the individual entrepreneurs (from farmers to industrialists). It should be managed by a board of directors with appointments of knowledgeable personnel from the region’s public and private sectors and should answer to the Ministers of Agriculture at the COTED – Agriculture level. Based on the stakeholders’ workshop, it is possible with extremely strong guidance and the willingness of certain organizations to subsume some level of independence that they could partner in developing the RICB structure. These would include joint leadership from CABA, WINFRESH, WINFA, CAFAN CARDI. The

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15 Based on estimates from the action plans, we have adjusted the amounts to fit reasonable requests for funding for five years given the five fund proposed

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former two could lead on marketing and the latter three on primary and value-added production. The RIBC board should be extended to include representatives from the leading private sector groups, the public sector and the supporting technical assistance agency for example IICA.

Figure (b) Proposed Operational Structure

Source: CARIBBEAN INTEGRATED SUPPORT PROGRAMME, CARICOM PROJECT, SEPTEMBER 2010, Samuel Scott. Ph.D.
Estimates for each country and the amounts are presented to fit realistic levels to seed agribusiness development of the region.

**Proposed Five Year Plan for Agribusiness Sector Adjusted Estimates based on Action Plans**

<table>
<thead>
<tr>
<th>Country (in US$ Million)</th>
<th>Capacity Building Fund</th>
<th>Production Finance Fund</th>
<th>Value-Added Fund</th>
<th>Market Sustainability Fund</th>
<th>Infrastructure Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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**INFRASTRUCTURE FUND**

$200.00

Source: Caribbean Integrated Support Project, CARICOM Study, September 2010

The sector will require rigorous support from organizations that are supporting agribusiness in the region. The following are the designated estimates. It should be recognized that over US$91 million is needed as shown in the following table.

**Proposed Five Year Plan for Supporting Organizations based on Estimates**

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<th>Supporting Organizations (in US$ millions)</th>
<th>Capacity Building Fund</th>
<th>Production Finance Fund</th>
<th>Value-Added Fund</th>
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Source: Caribbean Integrated Support Project, CARICOM Study, September 2010

The report contains a Regional Action Plan intended to advance the establishment of the proposed Agribusiness Development and Marketing Fund and National Action Plans for the individual CARICOM Member States.
The CARICOM Secretariat embarked on conducting a study targeted towards “Developing an action plan for promotion of a regional agribusiness sector and targeted commodity enterprises – CARICOM.” This is part of a larger programme (Caribbean Integrated Support Programme – CISP) for the promotion of a regional agribusiness sector and targeted commodity enterprises. The project seeks to develop a strategic framework for regional agribusiness development, and promote training and dialogue among national and regional policy makers and relevant private sector stakeholders to advance the agribusiness/commodity development agenda.

The overall objectives of the project are to:

- Develop a strategic framework for regional agribusiness development, which includes action plans for targeted commodities
- Promote dialogue among national and regional policy makers and relevant private sector stakeholders to advance the agribusiness/commodity development agenda

1.1 Purpose and expected outcomes

The purpose of this study is to develop an action plan for the promotion and development of two areas: (1) a regional agribusiness sector and (2) targeted commodity enterprises. The expected outcomes are:

- Enhanced policy and technical advice and transition mechanisms provided to decision makers
- Framework for facilitated implementation of new arrangements between public and private sectors for developing a viable agribusiness sector
- Increased awareness among producer, agro-processors, exporters of opportunities within domestic and regional markets particularly for targeted commodities
- Increased agribusiness investment proposals developed and funded, particularly for proposals that are regional and sub-regional in scope
- Increased coordinated pro-agribusiness policy measures developed/ strengthened and implemented.

1.2 Background

The CARICOM region consists of an archipelago of islands, and three mainland countries on the Americas land mass. The overall population is 16.78 million (Haiti – 10.09, other 6.67 million). The area using CTO data shows tourism arrivals of 6.21 million as stay over visitors and 8.10 million as cruise ship passengers.

The agricultural sector is besieged by a confluence of factors that has literally caused the sector to experience systematic decline for the last three decades. These include a decline in the traditional export subsector consisting industrial agricultural commodities consisting of sugarcane, banana, cocoa, coffee, citrus and spices. Additionally, the region

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16 Data generated from various sources including World Bank Reports
17 Caribbean Tourism Organization
has experienced catastrophic hurricanes that have ravaged the remaining lifeblood of the agricultural sector. Perhaps the most constraining factors are a combination of aged farmers, youngsters not willing to get into agriculture or supply their labour for agricultural work and the expansion of the tourism service sector and drug culture. In responding to the above, several projects and programmes have been implemented by various island governments and donor agencies through bilateral programmes and aid to the private sector and NGOs. The results have been mixed with most of these programmes yet to achieve any level of significance in terms of financial and non-financial sustainability.

1.3 Scope work, terms of reference and methodology

1.3.1. Scope work and terms of reference

The primary responsibilities of this consultancy were data gathering, analysis, and reporting of the thematic areas outlined in the specific tasks and the purpose established above. The consultancy covered the 15 CARICOM territories. The target groups were agribusiness stakeholders including policy makers, producers, processors, and exporters. The consultants have undertaken three key sets of activities as follows:

- research and analysis
- preparation of reports (inception, draft/progress, and final)
- presentation of findings at a one-day stakeholders’ workshop, organised by the CARICOM Secretariat

Regarding (1) above, research and analysis, the consultant engaged in activities based on the following themes/research areas:

(a) **Background data: status of agribusiness and agritrade of the CARICOM countries**
- Identify the key types of agribusiness in the region and business practices
- Assess status of agriculture and commercial policies
- Collect statistical data on production, consumption, and trade (intra and extra-regional) for all countries during 2000–2007
- Analyse current trade flows and trade participants, both formal and informal
- Identify commonalities and differences in agricultural trade among CARICOM member states

(b) **Opportunities and constraints to agro-business development and competitiveness**
- Analyse the barriers to intra and extra-regional trade, including infrastructure, transport, customs, and policies (tariff and non-tariff barriers, SPS18 measures and other technical standards, export restrictions, and others)
- Assess the regulatory and administrative cost burden to developing a competitive regional agribusiness sector
- Distinguish between importance of barriers to trade for intra-regional versus international trade
- Evaluate the capacities of institutions that are an integral part of the agribusiness development objective, including ministries of trade, finance, agriculture, the agencies responsible for food safety and standards, chambers of commerce etc

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18 Sanitary and phytosanitary measures
• Assess status of Business Development Services (BDS) i.e., to identify the number, type, and quality of existing BDS and assess the need for and use of these services by agricultural entrepreneurs
• Assess recently signed EPA and its impact on objectives for intra and extra-regional trade in the selected commodities
• Based on the list of identified barriers to trade, prioritise the barriers for CARICOM countries, and identify the binding constraints

(c) Commodity chain assessments
Some of the commodities selected for consideration\(^{19}\): papaya, avocado, mango, ginger, sweet potato, other root and tubers, coconut, cocoa beans, maize, hot peppers, small ruminants. The final list of commodities is presented:

• Market analyses to identify feasible commodities to be supported based on market opportunities
• Value chain analyses of selected commodities to identify opportunities constraints at each stage of the commodity chain (apart from those assessed above) that are specific to the commodity
• Analyse opportunities and potential for product-market linkages – with particular emphasis on value added products – at the national, regional and international levels, including the agro-tourism linkage at the national and regional levels
• Identify opportunities for creating and taking advantage of economies of scale and specialisation (i.e. the natural advantages of countries for producing specific commodities); production integration; and cross border investments.

(d) The key recommendations
Based on constraints and opportunities identified, provide action-oriented recommendations, particularly with regard to:

• upgrading and strengthening commodity value chains to ensure competitiveness
• integration of viable SMEs into these value chains; as well as beneficial participation of the poor (as consumers, farmers, agro-processors, and employers) in the process
• risk management instruments
• developing/strengthening regional support institutions/services to deal with issues such as food safety and food product an process standards, marketing, finance, and transport

1.3.2 Methodology
A work programme to meet the project objectives was developed and was used in the evaluation and analysis of:

• The status of agribusiness and agrittrade of the CARICOM countries; and the region as a whole

\(^{19}\) Some analytical work has already been undertaken on five commodities: coconut, hot peppers, papaya, sweet peppers, and small ruminants for Barbados, Belize, Guyana, Jamaica, St. Lucia, St. Vincent, Trinidad & Tobago
• The opportunities and constraints to agribusiness development and competitiveness
• Development of commodity chain assessments

It required executions of activities to address the following components:

**Trade data component**

The purpose of gathering secondary and primary data were to provide the relevant inputs in the proposed project in reference to proper the evaluation of the agricultural data profiles for each CARICOM member states. This is critical for the decision making as well as formulation of programmes and policy for the enhancement of the agribusiness sectors as per the four major objectives of:

• production for food and nutrition security
• production for import replacement
• production for export market to increase export earnings and foreign exchange
• production of indigenous species for agrisector stability and employment

The following is a description of the data collected and the processed utilised to optimise its usefulness to meet the project data requirements regarding, crops, livestock, fisheries products. For agricultural production – this includes time series data for the period 2004–2008 and 2009 where available. This data was reprocessed to include reclassification and ranking of crops by subsectors. This data was further restructured to include annual trends using 2004 as a base year. Trade statistics were collected from the CARICOM Statistical Unit, the Planning Units and Agricultural Statistical Units of the Ministries of Agriculture (where exists), and the Central Statistical Offices in each country. These were complemented by looking at databases provided by supranational organisations. This allowed for:

• ranking of food items traded (2008)
• import and exports by major divisions (2004–2008)
• imports and export by country of origins and/or destinations (2004–2008)

**Agribusiness and value chain assessment components**

The overall methodology included the use of untested questionnaires to generate data and information to satisfy the 20:

• opportunities and constraints to agribusiness development and competitiveness
• commodity chain assessments – commodity enterprise value chains

The questionnaires were used in focus group meetings and one-on-one interviews with representatives from the subsectors, organisations, firms and institutions to include: primary producers, input suppliers, agro-processors, customs, exporters, service providers, educational institutions (universities), technical agencies and donor agencies, finance providers (institutions). An unstructured questionnaire was developed to gather

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20 These included: Strategic Framework Questionnaire; Action Plan Data Sheet; Agro processor Questionnaire; Exporter Questionnaire; Customs Questionnaire; Primary Producers Questionnaire; Ocean and Air Cargo Handlers Questionnaire; Input Suppliers and Service Provider and Distributors; Questionnaire; Finance Provider Questionnaire; Educator and Training Institution Questionnaire; Hotelier Food and Beverage Questionnaire; Technical Assistance Agencies/NGOs and Donor Agency Questionnaire
information on the agribusiness sector policies and programmes. An action plan template was used to cover each commodity by country from the key stakeholders participating in focus group meetings.

In terms of secondary data and information a number of technical reports and studies were reviewed. These were gathered from the CARICOM secretariat, Ministries of Agriculture, technical assistant/donor agencies, private sector organisations and local non-government organisations.

In each country the project was coordinated by a National Coordinator, who was integrated in the investigation processes supporting the development of contacts and meetings, participated in the meetings and provided inputs in the action plan templates.\textsuperscript{21}

They provided substantial support in identification and arrangement of meetings with integrators and facilitators in the commodity value chains, focus groups and individual meetings.

**Methodology in mapping and analysing the value chains**

The concept of value chain work done in addressing competitiveness, management and strategy was developed by Porter and is adopted across the board in several sectors, systems and commodities. The issue is the apparent over application of this by practitioners trying to adapt this to several commodities. In the region attempts by FAO, IICA, and IDB in conducting value chain analysis has yielded mixed outcomes as result of the lack of reliable data to develop investment profiles, enterprise budgets, cost of production, market returns and market margins at various levels of the integrators and facilitators within the chain. Whether the chain is driven by the supply side (producers) or the demand side (consumers), the model yield the most satisfactory results with products that are highly differentiated, and where data can be easily generated at the respective levels of the value systems (series of integrated value chains) especially with a focus on the value gains, costing and pricing of the inputs.\textsuperscript{22}

To conduct the value chain analysis the consultants collected cost of production data where available for the targeted commodities; collated input costs and prices at the various levels for each level of the commodity value chain. To generate satisfactory results the following value chain mapping model used by the US Department of Energy – APEC “Energy for Sustainable Communities” in developing integrated villages and agribusiness enterprises in China. This system allowed the consultants to map and identify the key constraints at the different levels and design strategies to overcome these. Recognising that issue of data sufficiency the focus was on those commodities where data can be generated. The construct of this model allows for the evaluation of the of the various value chains by examining the industrial organisation (IO) of the markets by:

- evaluating the structure of the industry

\textsuperscript{21} In some countries (Jamaica, Guyana, Antigua, Belize, St. Lucia, St. Kitts, Trinidad and Tobago) the National Coordinator provided an assistant who invariably provided key support in the process. They have demonstrated that in any subsequent follow-up especially in implementation they should become key leaders.

\textsuperscript{22} “Clues in an iPhone Autopsy: mapping apple’s supply chain with cost rising at each stop” by David Barboza, New York Times, 6 July 2009
examining the level of efficiencies
noting organisation of the farm firms and the intermediaries at the retail and wholesale levels
assessing competition in terms of the structure, conduct and performance of the targeted markets
assessing the distribution of benefits to determine how the producers can capture greater share of the profits and market margins (i.e., more of the food dollar) and/or the consumer gain by lower unit cost value
utilising end market information to show the gains

The general approach was to evaluate what exists, examine where are the gaps, determined what are the mitigations measures taken to ameliorate the issues, what different can be done, what system would be needed, what are the success stories and how the proposed interventions and solutions could be resourced.

1.3.3. Consulting organisation and team

This consultancy was conducted by Landell Mills Ltd. Landell Mills presented a strong technical team that is very knowledgeable of the Caribbean and the agrifood systems in CARICOM. This team consisted of three key experts:

- Team Leader/Agribusiness Specialist: Dr. Samuel Scott
- Agricultural/Industrial Economist/Value Chain Analyst: Mr. Dudley Chase
- Research Data Analyst: Mr. Matthew Ramsaroop

1.4. Criteria for enterprise selection

A number of studies have been done on various commodity enterprises by a number of organisations. The challenge appears to be what target commodity enterprises that should be prioritised in the study on a country specific basis. On any island the market environment creates an atmosphere whereby over 90–100 commodity enterprises promoted for farmers to become engaged. When import options are included producers are faced with the option of becoming engaged in over 150–170 enterprises. This and other key constraints are the main contributors to market failures and support the preponderance of subsistence agriculture in the region. In this study several approaches were used to determine the targeted commodity groups and enterprises as revealed in previous communications and some of the studies reviewed. These approaches are illustrated in Section 3.4.

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23 See Box1 in the project document.
25 FAO, 2009. CARICOM Food Security Study, Phase II; ITC/FAO Trade Opportunity Scan for the Caribbean; Value Chain Cluster work done for COTED, Jagdeo Initiative
SECTION 2. STRATEGIC FRAMEWORK

A strategic framework has key elements that when reviewed sequentially lays out the foundation on which an issue, institution, organisation, policy, programme can be assessed. It promotes the boundaries for analyses and provides clear directions through goal and objective framing mechanisms are done. It establishes the fundamental principles, that are binding, and show how the vision, mission are linked to the strategy, goal and objective. Figure 2.1 shows the constructs for the overall framework. It can also guide layers of frameworks and various components. This study has that feature as reflected in the four policy options that are the foundation of this investigation and will be reviewed in the section later.

Figure 2.1. Conceptualisation of a strategic framework

The investigation calls for examination four policy options/objectives that are integrated. These are:

- Strategic policy option/objective # 1 Identification of commodity enterprises to enhance food security
- Strategic policy option/objective # 2 Identification of commodity enterprises for competitive import replacement


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- Strategic policy option/objective # 3 Identification of commodity enterprises to increase export earnings and foreign exchange
- Strategic policy option/objective # 4 Identification of commodity enterprises (particularly indigenous species) for value-added products, tourism market and agri-sector stability through increased employment

To satisfy these overall implications of domestic food production and distribution, the operation of trade and agribusiness at the regional, subregional and country level are assessed. This must be done by recognising roles of the trade and agribusiness stakeholders (primary producers’ enterprises, institutions/organisations, and other value chain integrators and facilitators) and how they can interact given the targeted commodities and the opportunities for local commerce and international trade within a competitive business enabling environment. The investigation looks at the various layered frameworks and how they are integrated.

2.1 Introduction – Jagdeo initiative and the agribusiness framework

In 2004 the heads of government agreed to pursue a strategy to place greater focus on the Region’s agriculture. A strategy was developed with the assistance of support agencies (IICA, FAO, CDB). The process was essentially geared to address the ten key building constraints (KBCs) to agricultural development which became known as the Jagdeo Initiative. These are:

- Limited financing and inadequate levels of new Investments.
- Outdated and inefficient agricultural health and food safety systems.
- Inadequate research and development.
- Fragmented and disorganised private sector.
- Weak land and water distribution and management systems.
- Deficient and uncoordinated risk management measures.
- Inadequate transportation system.
- Weak and non-integrated information and intelligence systems.
- Inadequate marketing arrangement.
- Lack of skilled and quality human resources.

Chesney (2006) showed the results of the initiatives as it is linked to various domestic international activities (e.g., Agro 2003–2015, Millennium Development Goals), and its influence by some key elements to include but not limited to operationalising the Regional Transformation Programme for Agriculture (RTP) / The Community Agricultural Policy, which were two of the areas that most territories (representatives expressed during the investigation) felt have not kept pace with the intended deliverables (see Figure 2.2).  

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27 H. Arlington D. Chesney (2006), Jagdeo Initiative, Presentation to Caribbean Connect a High Level Symposium on the CSME, Bridgetown, Barbados
Chesney showed that the initiative is consistent with national, regional, hemispheric and global visions, and that a prosperous agriculture is key to rural prosperity, poverty reduction, food security, social equity and sustainable development given the interrelationships of the KBCs and the underlining framework to achieve some solutions in the areas of the strategic objective of rural prosperity, food and nutrition security and international positioning as highlighted in Figure 2.3.

Source: H. Arlington D. Chesney (2006), Jagdeo Initiative, Presentation to Caribbean Connect a High Level Symposium on the CSME, Bridgetown, Barbados
While we recognised that these constraints as stated by Chesney were not exhaustive of the constraints facing the region and, as suggested by the various stakeholders interviewed and reported in the SWOT\textsuperscript{28} for the individual countries, there were others that must also be addressed for comprehensive development of the sector, given the various strategic policy options/objectives. Many of the countries’ stakeholders, especially those in the larger territories, indicated that they have commenced addressing these and other constraints not because of the JI – KBC, but as a larger picture of their national priorities and the country’s strategic work plan. However, the measures and programme responses implemented in the various countries are provided in the “Measures and Programmes Implemented in the Various Countries and Impact on the JI–KBC as of June 2010.”\textsuperscript{29}

\subsection*{2.2 Vision, mission, mandates}

The strategy of the programme is strengthening of the region’s agriculture to reduce the level of food imports, enhance food security, create additional employment and reduce poverty in the region while creating the necessary enabling environment so as to attract private sector investments. The Common Agricultural Policy is enshrined in the Revised Treaty establishing the CARICOM community including CSME – Articles 56 & 57 of the Revised Treaty articulate the region’s agriculture, agribusiness policy, goals and strategic framework for policy implementation. The vision is that…

…“by 2015, agriculture will have made substantial progress in its contribution to sustainable growth, within a framework of transparent institutions and good governance that enables the transformation of its products and processes, encourages investment, drives entrepreneurship and assures an acceptable and consistent level of food security”\textsuperscript{30}

The mission is to…

“implement Interventions to address (3-4) Key Binding Constraints within the context of:

- the policy framework of the RTP/Community Agricultural Policy
- existing and planned complementary initiatives undertaken by national, regional and international organisations
- emphasis on non-traditional products, value-added and intensification of diversification
- practical programmes with achievable targets.”

The mandates are to recognise and develop the significant importance of agriculture in sustainable development in the Caribbean and to provide the framework within which

\textsuperscript{28} See Section 3.3 of the Report
\textsuperscript{29} Source: CARICOM Secretariat – compiled by Dr. Vincent Little
\textsuperscript{30} Agro Plan, 2003–2015
agriculture must be repositioned. For example in the case of Trinidad and Tobago the strategy is to increase the contribution of agriculture to the GDP from 0.6% to 3%.

**Food and nutrition security:** The framework for looking at food security is adopted from that proposed by FAO in its compressive food security and vulnerability analysis guidelines. This is shown in Figure 2.4. The access shows that there are key products established as preferences to include the root crops (sweet potato, cassava, dasheen and yams), legume grains, maize, marine fish, aquaculture, and some selected vegetable. While these are identified, most of the stakeholders who are expert in this area suggested the following issues to be addressed. These are location of seed banks and end product storages, products that can easily be transformed and prepared for consumption, and system for rapid response distribution, capital to develop infrastructures, capital to operate the storage depots and to procure the supplies annually.

Figure 2.4 Food and nutrition security conceptual framework

In the conceptual frameworks, the system to be developed must be able to withstand exposure to external shocks. It must have well developed market arrangements developed to make food available at the individual, household and community levels. There must be the basics services and infrastructure available. Its foundation bottom-up must be based on the natural physical, human, economic and social assets, which through and integrated process will yield a heightened state of nutrition status with reduced mortality. This is the framework used to evaluate the current systems and needs of the food and nutrition security system in the region. According to the European Union “with regards to food security, trade is a part of the solution, not the problem. A smoothly functioning global food market can help to iron out local variations in supply and it can also hand real economic opportunities to developing countries.” Among the farming groups in the region, and especially among small farmers, this view is not well received as some see imports as in direct competition with local production.

Food and nutrition must also be looked at in the light of climate change and changing weather patterns. In balancing food security and climate change, it is forecasted that the effects of increased temperature, rainfall, droughts and flooding, shorter growing seasons, change in ocean temperature effect on marine fish, heat stress on crops and animals, change in disease patterns and reduce crop yields will have the greatest effect on poorer countries and their food security. In response to this the EU is pledging more support to the cost of climate change adaptation and mitigation in developing countries which is estimated to be USD100 billion by 2010. Apart from the recommendation of insurance based risk management tools farmers are encouraged to: conduct better crop rotation to optimise the use of available water, adjust planting dates according to temperature and rainfall patterns, planting crop varieties better suited to new weather conditions (this require increase research and development), and creating windbreaks on arable land to reduce water and soil erosion. In the Caribbean if some of these measures are done in combination to requirements stated above, there could be successful food and nutrition programmes.

**Import replacement:** This must be examined within the framework of what products can be competitively replaced, efficient distribution, satisfaction of food and nutrition security and the relationship to national security. Figure 2.5 shows the system within a typical small, open economy in the region. In the region commodities that are targeted includes onions, mutton and goat products, poultry products, rice and wheat base flours, certain legumes grains, maize, fruit concentrates and drinks, starch based snacks, and convenience value-added vegetable products

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Increase export earnings and employment: This is an area that continues to show poor results for all CARICOM economies. This is especially so for specialty products or agrarian agricultural commodities. An estimate of the two major regions (North America, UK/EU) shows that these markets are valued at USD 6–7 billion.\footnote{See USDA /ERS estimates on specialty products imports and Euro fruit estimates.} The sector is plagued with major market failures due to slow payments, non-payment, poor quality of exports,
excessive spoilage charges and unsubstantiated credit notes by importers/distributors. These market failures are due to performance on both sides handling the product.

Figure 2.6 below shows the value systems (that is a system consisting of various value chains) as shown by the market and distribution channels. It is highly complex, requires direct contact with the volume movers in the respective markets and a system that can reach the target market easily. Especially for low margin products traded in primary forms, the inability of CARICOM exporters to be in the market and directly involved in distribution, their products are used as suppliers’ credit, resulting in the effects noted above.

For value-added products where the margins are as high as 300–400%, the issues are that of high production costs, high cost of packing material, and high freight rates cause most products to be non-competitive. Additionally, CARICOM exporters are not familiar with how products are placed and positioned in the major retail areas with requirements of understanding efficient consumer response, category management, market green fees and shelf space costs. While efforts have been made to link these exporters to distributors in the third country markets, the arrangements become non-sustainable due to the above-mentioned reasons. There are no estimates available on the amount of funding that has been used to take exporters to participate in international trade shows, since the 1970s with the development of market promotion agencies ranging from individuals export promotion agencies, e.g., Jamaica National Export Corporation, to regional agencies of the Organisation of Eastern Caribbean States/Export Development Unit (OECs/EDU). The results have been dismal in gaining traction for exports in third country markets.

But there are strategies and models that can be implemented to satisfy strategic options/objectives 3 and 4. Models used by other countries include the development of “overseas trading houses” which ironically has been used for banana exports in the OECS subregion, but has not been adopted seriously for agrarian agricultural products. One successful model that will be presented as a case study will show how a small country has been able to generate over USD 350 million annually in export earnings from the production and sales of specialty products in their home country (see Section 4).

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33 See the work done by IICA for Belize exporters and the proposal to the Jamaican Government.
2.3 Institutional arrangements

In order to facilitate the implementation of the process to eliminate the constraints identified by the Jagdeo Initiative, it was decided to allocate individual constraints to a particular country Ministry as per the COTED-Agriculture. These are as follows:

- Limited financing and inadequate levels of new investments – Barbados.
- Outdated and inefficient agricultural health and food safety systems – Trinidad & Tobago.
- Inadequate research and development – Guyana.
- Fragmented and disorganised private sector – St. Vincent.
- Weak land and water distribution and management systems – St. Lucia
- Deficient and uncoordinated risk management measures – Antigua
- Inadequate transportation system – St. Kitts/Nevis
- Weak and non-integrated information and intelligence systems – Jamaica
- Inadequate marketing arrangement – Jamaica
- Lack of skilled and quality human resources – Dominica

To assist countries in the facilitation of these projects a number of institutions have been identified these are:
- Caribbean Development Bank (CDB)
- CARICOM Secretariat
- Caribbean Agricultural Research and Development Institute (CARDI)
- Food and Agricultural Organisation (FAO)
- University of the West Indies (UWI)
- Inter-American Institute for Agricultural Corporation (IICA)
- Caribbean Agribusiness Association (CABA)
- Caribbean Agribusiness Marketing Intelligence & Development Network (CAMID)
- In country marketing agencies e.g. DEXIA

Some of these institutions were engaged in the initial preparation of the project and would provide additional technical expertise to the local country technicians to formulate national programmes. The process involved the alignment of the Ministries of Agriculture and various agencies consistent with and supportive of the new agriculture commercial competitive production. Thus the process of review of addressing the constraints included the reorientation of the institutional structure for greater collaboration resulting in increased coordinating and sharing of information to enhance policy making.

**Policies and support mechanism**

In addressing each constraint the process will include the specific arrangements to address the particular issue: These are:
- Formulation of financial policies including concessionary rates, modification of security requirements
- Differentiation between subsistence and commercial agriculture
- Institution of commodity competitiveness policy
- Risk transfer policies intervention
- Diagnostic review (assessment) of policies impacting on private sector
- Determination of policy measures to support private sector
- Development of marketing policies and strategy consistent with CSME and agricultural policy
- Agriculture disaster risk management and policy to be integrated into the national comprehensive disaster management strategy
• Establish working relations between the Ministries of Agriculture and Disaster Management Agency on a routine basis
• Integrated disaster management response
• Information system to provide comprehensive data on disasters
• Formulation of a national research and development policy consistent with the agricultural development strategy
• Review the policy for compatibility with regional research policy and identify compatibility and synergy for economies of scale
• Establishing a policy to determine the resource requirements and allocation between national and regional needs based on compatibility and synergy
• Establish operations policy relating to programming and execution
• Establish transportation policies consistent with National Agricultural Production Strategy
• Implementation plan for the strategy
• Comprehensive policies for land distribution and administration:
  • Land titling
  • Transparent land distribution system
  • Land as collateral security, including leased land
  • Land information system and land bank (land zoning/utilisation)
  • Watershed and soil conservation and soil fertility management policies
  • Comprehensive water distribution and management policies relating to water usage in agriculture, relating to harvesting, storage and distribution
  • Land information system to inform production scheduling
  • Water conservation policies and distribution for use among stakeholders.

2.4 Technical issues and technology

To implement measures given the constraints identified, there were some key technical issues and improvement in the transfer of technology. The match includes the Identification and mobilisation of technical assistance requirements with development and implementation of technical support to be provided and determine terms and conditions under which this support would be made available. Other issues included development of postharvest programmes, design intervention for specific technical assistance required for execution of work in the areas of land and water management, and the mobilisation of technical resources prospects available within the region.

2.5 Enabling environment – investments, legislation, and regulations

The regions governments have sought to modernize the business enabling environment in order to make the sector more competitive. We list a few of the important ones; some of them will be included in the detail exposition in section 3.1. These are:
- Amendments to the Banking Act to give recognition to the peculiar nature of agriculture
- Amendment to the Insurance Act to pave the way for agricultural insurance
- Review of the Security Act to encourage innovation in the sector to satisfy security requirements
- Review draft animal health and food safety bill for national compatibility and make necessary amendments
- Establish national legal framework to integrate this bill into the regional CAIT and food safety system including administrative and monitoring system
- Enact laws to support and create incentives for investment in the sector
- Recognise the role of public/private sector relationships
- Prepared programme to reduce risk and emergency response
- Legal framework to mitigate praedial larceny
- Reviews laws dealing with research and development such as science and technology (biotechnology) measures and regulation
- Chemical use regulations
- Invasive species surveillance relevant to the introduction of new varieties and species
- Identify the legislative programme required to give effect to the policies on land distribution and administration
- Producers’ identification system
- Farmer registration system
- Marketing System to reduce fraud in stolen agricultural products

2.6 Commodities – priorities and targets

The ultimate objectives behind the Jagdeo Initiative was the regional transformation of agriculture to deal with the question of food security – reducing the level of imports – improving the competitiveness of the industry and providing increased employment thereby alleviating poverty. At the same time, providing significant inputs necessary for the development of the agro processing subsector as even though there are some inroads in this subsector, this is achieved through the use of imported raw and semi-processed raw materials. It is envisaged that eventually the region would have a coherent commodity policy and at the national level there would be a national agricultural strategic plan which would in turn lead to the development of a regional plan.

An integral target was the increased productivity of the small farmers, which could be made possible through the initiative of an Agricultural Development Fund; however, while this target still remains on board, priority has been given to the establishment of a Regional Development Fund (USD 439) with the introduction of a window for agriculture.

It should be noted that work on removing the identified constraints is progressing at a slow pace. A significant infusion is the Agro Business Enterprise Development

34 Climate Analysis Indicators' Tool
Programme which has been funded and provides opportunities for young people to move into the agricultural business sector. However, the responses of the stakeholders across the region are that:

- there has been full integration of the economies of Belize, Haiti and the Eastern Caribbean States as a whole the CSME and by logical extension the agricultural sector programme
- there still continues to be major non-tariff barriers used by some of the regions economies to exclude importations of certain products
- lack of resources to commit to the mandate established
- distribution of land resources slow in some countries
- easy to import products from third countries than the region
- major transportation gaps in terms of availability and costs facilitate the movement of goods
- several operational risks in terms of agricultural labour availability, placement and management, combined with low worker productivity
- unbalanced policies directed towards small farmers with unreliable results and no support for producers that can provide competitive output
- major trade agreements especially the EPA that the promises are unrealistic while the EU requirements for imports are way beyond the capacity of the producers and exporters e.g. non-admittance of marine products due to requirement posed on water quality
- unrealistic expectation of the private sectors and partnership with governments

Against that background the investigation, using data from previous studies and responses from the various stakeholders, the targeted commodities and those suggested by the various work programmes and project funding were used to determine the commodity mix for the sector and the action plans to be developed. The following table shows the prioritised and targeted commodities by country.

Table 2. 1. Priority and targeted commodities given the strategic options/objectives

<table>
<thead>
<tr>
<th>Commodities</th>
<th>Target commodities as per Project Document (See Box 1)</th>
<th>Targeted commodities as per Revised Inception Report (See Inception Report)</th>
<th>Suggested commodities as per stakeholders’ input, country work programme and projects (See Surveys and Action Plan Template)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ackee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avocado</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Aquaculture</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talapia</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Shrimp</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Beef cattle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black eye peas</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breadfruit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carrots as other vegetables</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Cascarilla</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cassava</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Coconuts</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Coco beans</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Corn (maize)</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Dairy cattle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dasheen as other root crops</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Goats</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Golden apples</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Herbs/spices/condiments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honey</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Hot peppers</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Irish potato</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Mangoes (Julia)</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Melons</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NT forest product</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Onions</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Pawpaw</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Pineapples</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Plantains</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Poultry</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Pumpkins</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Rabbits</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Red kidney beans</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Seafood species: tuna, snapper, grouper, mahia-mahia, bangamary,trout,</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Sheep</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Soursop</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Sweet potato</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Tomatoes</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Yams</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Other vegetables</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

SECTION 3 STRATEGIC ANALYSIS

3.1. Enabling environment for strategy implementation

In this section the enabling environment is discussed with the view of identify the opportunities regarding the legislative and administrative guidelines and the various trade agreements within the CARICOM region.

3.1.1 Current system and existing enabling environment: business and legislative environment for agriculture/agribusiness

1. Introduction

The issue in the region remains that, in many respects, the agricultural legislation is obsolete to address key issues related to production, risks, employment, trade, and integration. While other regions have revamped and revised their agricultural legislation to accommodate the changes in the global environment, the region has not done so with respect to agriculture. For example, Barbados’ agricultural legislative act was promulgated in 1932. While, a Sustainable Agricultural Development Bill has been enacted in recent years in Barbados, a full on legislative reform is needed to change the framework within which this industry operates. Legislative bills like these that are merely reactionary piece meal initiatives to address one or two economic effects of the current trade environment do little to ensure that (a) sector policies created by each country actually work practically, (b) the region can react appropriately to trade agreement initiatives, like those proposed in the Economic Partnership Agreement (EPA), (c) each country can efficiently update standards in a uniform fashion to comply with changing global standards and rules on items such as food safety, and (d) the legal environment is one in which agribusiness is promoted through access to information, capital, and other significant resources.

The Jagdeo Initiative was promulgated to remove constraints to the development of agriculture in the region. The initiative highlights ten key binding constraints and corollary initiatives that the region must undertake that if successful would revamp the industry. (See Box 1.) Support for the implementation of these items should be the revision of the legal framework for agriculture in the region. While many reports have touted the creation of a harmonised legal framework to address global standards for the long-term, on a more practical level the in-country focus group meetings, meetings with ministry heads, etc. revealed a much more practical need to revamp current agricultural acts that address mere issues like praedial larceny, legal title holdings to land, capital to support production. Addressing these issues on a micro-level may appear elementary; however, the collective effect of these changes could improve the enabling environment drastically.

Currently most countries in the region recognise that part of their work plan for agriculture must include the establishment of an enabling legislative environment to support agricultural development as an objective. However, there must be a concrete initiative in place to actually do this. The current capacity of each country to promulgate one body of law akin to the Farm Bill of 2002 in the United States or the European Union’s Common Agriculture Policy has to be developed in order to integrate the pre-existing agricultural
policies, adapt to the current global environment, and address the practical issues affecting agriculture in the region.

During the survey of legislation in the region, few laws specifically addressing non-traditional agriculture were found. Many of these laws were enacted prior to these countries becoming independent from the sovereigns, which controlled them economically. Others were enacted immediately after independence and have only been revised as recently as ten years ago. And it is very clear, in most instances, that the laws reflected the general economic drivers of the time. Further, the laws appear to sustain the economic power and access to one group. On the other hand, where laws were promulgated to provide economic empowerment in the industry, they were less than adequate, thorough, or technical enough to drive the growth necessary to sustain the industry. Laws need to be drafted in such a manner that they provide access to information and resources. For example, if a piece of legislation governs fishing licences, that same law should indicate the costs involved and any programmes available to assist those entering into the industry. Such laws not only should be revised, but can also be consolidated into one body of legislation which takes into account the geo-political events of the era post-independence.

This section is broken up into country summaries, where the current legislative and business enabling environment, as it relates to agriculture and agribusiness, is addressed. Opportunities to support the industry are also discussed. Within the country summaries, the legal and business enabling environment is treated separately. To provide an adequate picture of the current environment the following legislative categories were studied: 1) Industrial agriculture, non-traditional agriculture and fisheries; 2) Customs, taxes, and other financial measures; 3) Access to credit and capital; 4) Business formation; 5) Quality measures, standards, and protection, and 6) Properties devoted to agricultural land.

Box 1. Jagdeo Initiative’s ten key binding constraints and necessary interventions

<table>
<thead>
<tr>
<th>Constraints</th>
<th>Necessary interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Limited financing and inadequate new investments</td>
<td>Establishment of a Regional Agricultural Modernisation Fund</td>
</tr>
<tr>
<td>2. Outdated and inefficient agriculture, health</td>
<td>Establishment of a Caribbean Agricultural Health and Food Safety Agency (CAHSFA)</td>
</tr>
<tr>
<td>and food safety systems</td>
<td></td>
</tr>
<tr>
<td>3. Inadequate research and development</td>
<td>Definition and implementation of a regional R&amp;D policy and action plan</td>
</tr>
<tr>
<td>4. Fragmented and unorganised private sector</td>
<td>Strengthening of private sector organisations and collaboration</td>
</tr>
<tr>
<td>5. Inefficient land and water distribution and</td>
<td>Establishment of a system of incentives for improved land and water use</td>
</tr>
<tr>
<td>management systems</td>
<td></td>
</tr>
<tr>
<td>6. Deficient and uncoordinated risk management</td>
<td>Development of integrated regional risk mitigation (natural disasters) and relief (including agricultural insurance)</td>
</tr>
<tr>
<td>measures including praedial larceny</td>
<td></td>
</tr>
<tr>
<td>7. Inadequate transportation system particularly for</td>
<td>Determination of freight needs, upgrading of ports and consolidation of services</td>
</tr>
<tr>
<td>perishables</td>
<td></td>
</tr>
<tr>
<td>8. Weak and non-integrated information and</td>
<td>Integration and modernisation of industry and national information systems and services</td>
</tr>
<tr>
<td>intelligence systems</td>
<td></td>
</tr>
</tbody>
</table>
9. Weak marketing systems, linkages and participation in growth markets | Strengthening of joint marketing opportunities and facilitation of access to EXIM-type financing

10. Lack of skilled human resources | Upgrading and integration of curriculum and training at all levels

The Initiative also highlights ten requirements for global competitiveness, which are interrelated to the above constraints and interventions:

(i) Re-definition of the agricultural sector to include the entire agriproduct chain and the linkages with tourism and other economic activities;
(ii) Re-thinking the importance of the regional markets, including the tourism and hospitality industries, and those markets made available through the CARICOM bilateral trade agreements;
(iii) Strengthening the region’s negotiating stance to secure the best conditions possible for production and trade;
(iv) Appropriate packages of support for both the traditional and new areas of production;
(v) Policy reorientation that is fully grounded in the changed context for agriculture;
(vi) Institutional realignment, away from traditional structures and organisational forms towards smart public-public, private-private and public-private sector partnerships and alliances;
(vii) Technological readiness to change existing structural systems and build flexibility and capacity to achieve product realignment and relevance within changing product preferences and to provide the critical supply side mass to deal with supply chain consolidation;
(viii) Physical and regulatory infrastructure that underpins the entire agri-food/product production, distribution and trade system to reduce transaction costs and facilitate expanded trade.
(ix) Human resource development, to facilitate the mastering of information and knowledge-driven practices.


2. Case Studies

ANTIGUA AND BARBUDA

The agricultural sector constitutes a small portion of the Antigua and Barbuda’s annual GDP. At the time of the in-country field study, the agricultural sector contributed approximately 4% of the GDP. The biggest contributors to the GDP still remain in the service’s sector, as in most of the region, as well as the construction industry. This fact is clearly reflected in the laws promulgated to govern these industries. Notwithstanding the fact that Antigua and Barbuda contains some of the most detailed laws related to small business creation in the agricultural sector that the in-country field study could find to date (as detailed below), the breadth and comprehensiveness of the general body of laws appear to be concentrated on tax, financial services, the service sector, and construction. It appears that perhaps the robustness of these industries provided the impetus for the creation of these laws (i.e. the growth supported by the construction linked to the hotel industry). However, the reverse would need to be true for the agricultural sector, since as

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it stands now, the bulk of the production in this sector is targeted towards the domestic market. Growth in the sector would likely need to be bolstered by revising the existing laws in order to make them more robust and comprehensive to mandate business incentives for agricultural production, drive labour towards the sector (i.e. the current efforts to transform the public sector and reduce the size of civil service), and lastly, streamline the customs process to make exporting (as well as importing) more accessible to those willing to enter into agribusiness.

**Legal and business enabling environment**

**Legal**

Industrial agriculture: The laws affecting industrial agriculture in the country centre on the sugar industry. Through the Sugar Industry Corporation, cane farmers have access to technical assistance and credit, amongst other things. The Act creating this Corporation is broad enough to encompass a vast mission as long as it facilitates the longevity of the industry. In light of the implications of the EPA on sugar as well as the decline of the over the past 20 years, it is foreseeable that this legislation gives the Corporation Authority to assist producers within this industry throughout this transition, whether it be assisting via technical assistance to enter into value-added production, or utilise farm land to transition into more profitable ventures such as real estate development, tourism, etc. Please note that in addition to the Corporation Act, there are laws that require a financial obligation to sugar exporters, namely a cess on sugar manufactured and exported as well as a fixed quota on sugar exports.

Non-traditional agriculture and fisheries: All fruits and vegetables must be packed in licensed packaging houses. Of the in-country field studies, Antigua and Barbuda was one of the only countries with this specific legal requirement. Additionally, any person wishing to sell or grow produce must obtain a licence before doing so. All fishing vessels (local and foreign) are required to have a licence to operate in the territory. There are no other specific regulations on agriculture. Of the in-country field studies, Antigua and Barbuda had the least regulation on this industry, which as stated earlier is indicative of the industry’s contribution to the economy. Both agriculture and fisheries industries are promoted by the country’s Central Marketing Corporation by securing arrangements for packaging, exporting, marketing, and selling produce.

Customs, taxes, and other financial measures: The country has a 5% customs surcharge on most or all imports. CARICOM imports are also governed by Common External Tariff (CET) rates. Export duties include lobsters, sugar, molasses, and fish. Customs tariffs are between 5-70%. The country’s regulations provide for duty and tax exemptions or reduced rates. Additionally, the country has established a free trade zone where enterprises created within the zone are afforded certain exemptions like income or corporate taxation (which is currently around 40%) and export duty exemption for products being traded outside of the country. However, to date there are only two enterprises in that zone. The language of the legislation leaves room to expand the zone and therein lies an opportunity for the country to bolster its agricultural sector by expanding the zone to locations where agribusiness can be located or attracting agribusinesses.

Access to credit and capital: The legislation provides for the creation of a development corporation, bank, and fund that provides those involved in agriculture access to loans.
Business formation: Antigua and Barbuda is one of the few countries studied that possesses comprehensive legislation specifically targeted to small business. In addition to the other exemptions and incentives businesses receive as mentioned above, there is an opportunity here to harness agribusinesses as small businesses. The rules are clear and specify exactly how to qualify as a small business and enjoy the benefits that this entity has under the current laws. The prescribed small business activities that qualify under these laws include agriculture, forestry, fishing and aquaculture. Unlike, the other countries in the region, these rules help to create an environment where there exists one central place where agribusinesses can go to receive help in business formation, technical assistance, and access to credit.

Quality measures, standards, and protection: Measures include standards related to the pests, plant protection and animals. Also note that the country’s bureau of standards currently has nine standards for labelling and packaging certain goods (i.e. pre-packaged goods). A phytosanitary certificate must accompany all plant imports. Measures geared towards imports of livestock and poultry centre on preventing diseases, contamination, and infection. Rules regarding pesticides created are to manage the registration and ensure that certain prohibited pesticides do not enter the country. However, there are less rules on this topic than found in most other countries in the region. It is also important to note that Antigua and Barbuda has rules addressing praedial larceny and protective measures include employing persons to patrol designated areas and pay rewards for information on suspected incidences.

Properties devoted to agricultural land: The country’s development corporation is authorised to developing and managing plantations and other agricultural land for purposes of developing the private sector. The language under this rule is broad enough to contemplate developing pre-existing agricultural lands (i.e. sugar) to devote to other non-traditional agriculture so long as the development builds the private sector. While the tendency may be to develop land for tourism, there is an opportunity here to link agriculture to development.

Business

As mentioned above, the opportunity for agribusinesses to flourish is apparent through the fiscal incentives, small business development initiatives, and the country’s free trade zone. Currently, the country is viewed as a tourism centre and an offshore tax haven due to the business and tax incentives. Also, the country has sought to encourage international investment through the development of an offshore financial services industry, which it set about doing with the passing of the International Business Corporations Act in 1982. The benefits are further described in Section 3.1.3 of this report. The government has also sought via legislation to develop an offshore banking industry, and as a result, the country has a sizeable amount of banks. Internet gambling, also supported by legislation became lucrative in the country, but is currently dealing with US legislation effectively bans all international and inter-state online gaming.

The lesson to be learned from the aforementioned industries is that while they have suffered from the recent economic downturn, their initial success and expected rebound is as a result of a legislative push to create or sustain it.Notwithstanding this comment, the laws currently in place in Antigua and Barbuda have the potential to direct investment to the sector. The foundation and framework exists through the Antigua and Barbuda Investment Authority. However, this entity’s initiatives in the agricultural sector lack the promotion and encouragement in investment opportunities that other sectors like tourism.
and the financial industry receives. A good illustration of this issue is the fact that despite the small business policies and guidelines, there are only two enterprises in the free zone described above, which are both unrelated to the agricultural sector. Further, if one visits the investment authority’s website, none of the success stories touted lie within the sector. Further, in-country analysis revealed that while there are agricultural policies, since there is limited institutional push, i.e. agricultural development receiving a significant portion of the government’s budget, the kind of investment and development from the private sector has not reached its potential yet. Therefore, while there are current laws and programmes provide a good foundation to attract investment in the sector and provide a centralised place where those interested in participating in the sector, there is an opportunity for an institutional push to make this a reality.

Summary of laws

**Industrial agriculture**

*Antigua and Barbuda Sugar Industry Corporation Act (1979 consolidated 1992)* establishes the Corporation and its functions and powers including making arrangements relating to such lands, buildings, factories, machinery, vehicles, crops and any other property, aiding cane farmers with credit, technical, transport, agricultural and other facilities as necessary or beneficial for the sugar industry. These powers are broad and legally can encompass anything related to the industry as long as it facilitates the longevity of the industry.

*Sugar Export Cess Act (1947 amended/consolidated 1992)* imposes a (tax deductible) levy of $13.20 per tonne on manufactured in and exported from the country and provides for the payment of proceeds of such levy into funds established by the Act. The levy is paid on quantities of sugar exported as declared by exporters. An account-general establishes the Sugar Industry Price Stabilisation Fund, a Sugar Industry Rehabilitation Fund and a Sugar Industry Labour Welfare Fund to receive the proceeds. The Cabinet may make Regulations: (a) for the management and control of the funds; (b) regarding bodies administering the funds; and (c) prescribing the purposes for which the funds may be used.

*Sugar Quotas Act (1937 amended/consolidated 1992)* establishes via the Cabinet quotas on the manufacture of and trade in sugar and prohibits the exportation of sugar in excess of established quotas. The Cabinet may also, by order, declare in what manner any sugar manufactured in excess of the fixed quota shall be disposed of, and may order the seizure and destruction of any such excess stock of sugar. The minister may require manufacturers to submit returns on sugar production and trade.

**Non-traditional agriculture and fisheries**

*Central Marketing Corporation Act (1974 amended 1992)* establishes the Corporation with the duty to promote, facilitate and improve the production, processing and marketing of any farm produce, including fruits and vegetables, livestock and fish and related products. The Corporation is tasked with developing a coordinated programme securing the most favourable arrangements for the purchase, handling, distribution, transportation, storage, processing, exportation, shipping, marketing and sale of produce, to collect analyse and disseminate statistical data on agricultural produce, advise the minister regarding the production and marketing of produce, assist producers in the selection of commodities and the delivery to the market of such commodities and supply to producers
means of production such as seed, fertilisers and pesticides. The minister may give policy directions to the Corporation.

**Exportation of Fruit Act (1939)** contains no controls on domestic sales or exports of fruit and vegetables, other than the inspection, packing, and certification requirements. This Act makes provision for the public control on the exportation of “fruit” which means any variety of fresh fruit, nut, vegetable or other unprocessed product of any tree, plant, shrub or root. The Act appoints licensing of packing stations, requires that all fruit intended for export to be packed under the supervision of a fruit inspector at a packing station and in standard containers that bear specified labelling. Lastly, the Act defines offences and regulation-making powers of the Governor-General.

**Fisheries Act and its Related Fisheries Regulations (2006)** establish the fisheries committee and governs the issuance of licences for foreign and local fishing vessels as well as aquaculture. The Act also provides for the lease of land and parts of the coastal zone for purposes of aquaculture. Some rules concern use of feed in aquaculture and notification of diseases and pests affecting animals in aquaculture facilities. Other provisions of this Act concern, among other things, large driftnet fishing, introduction of non-indigenous species, importation of aquatic organisms, prohibited fishing methods, enforcement, legal proceedings, and regulation-making powers of the minister. The Act also details conservation measures for certain species, as well as prohibitions on lobster fishing and catfish. While the Act authorises the minister to create licence fees and royalties as necessary, the Act itself does not list specific amounts.

**Produce Protection Act (1929 amended 1992)** requiring any person wishing to grow and/or sell produce, meaning cacao, maize, coconuts, limes and wood grown, produced or manufactured in the country to obtain a licence that should be registered with the country’s Growers Register to be held by a police station in the district of the grower. The licence is granted by the police who maintain a list of licensed sellers. While an example of the application is appended to the Act, the pricing associated with registration is not apparent.

**Customs, taxes, and other financial measures**

**Customs Control and Management Act (1993)** governs customs procedures. All imports require a formal entry certificate or warrant, and may be cleared by the importer or a customs broker. Documents required by customs include an invoice, a bill of lading or airway bill, an import licence when required, and a certificate of origin for CARICOM goods. Customs decisions may be appealed to the Comptroller of Customs. Importers are not required to register, and it is not necessary to use the services of a customs broker. Pre-shipment inspection is not used. Inspection of goods is based on the customs officer’s risk assessment. The Second Schedule of the Customs Control and Management Act of 1993 govern the valuation process. Under the Act, the transaction value must be used as a first valuation method; it is defined as the price actually paid or payable for the goods when sold for export to Antigua and Barbuda. The Second Schedule of the Customs Control and Management Act stipulates that “the customs value may be determined using reasonable means consistent with the principles and general provisions of the Schedule.” Exceptions to the CET are agreed between CARICOM members and must be applied by the Community Council. Duty-free treatment is accorded only if goods satisfying the origin rules are shipped directly between member States. All rates are ad valorem. There are no seasonal tariffs; tariff quotas are not used.
Customs Service Tax Act (1986 amended 2006) applies a customs service tax of up to 10% on all imports, including those from other CARICOM countries. A lower rate of 5% is set for the products listed in a revised schedule of the Revenue (Miscellaneous Provisions, 2003); the agricultural products applicable are: corned beef, salted fish, ling fish, baby whites, mackerel, sardines, chicken, eggs, cheese, peas and beans, cocoa preparations, tea, red herring, tuna, juices, oats, cereals, sweet biscuits, unsweetened biscuits, luncheon meat, black pepper, insecticides, malt, soda, cornmeal, white flour, other flour, cane sugar, beet sugar, salt, milk, butter, margarine, refined edible oil, and maize meal.

Customs Duty Act (1993) sets forth the duty exemptions or reduced duty for goods originating in certain countries.

Customs Surcharge Act (1977 consolidated 1991) establishes a 5% ad valorem tax surcharge on certain dairy, fruits and vegetables, coffees, teas, cocoas, flour, sugars, prepared foodstuffs, and animal fats and oils as delineated in the schedule.

Fiscal Incentives Act (1975) grants income tax exemption to enterprises formed in the country. Tax exemption on exports may also be granted to these enterprises. This Act also permits enterprises to receive raw materials, machinery, etc. outside of CARICOM, if not found in the region, by granting a licence to do so.

Free Trade and Processing Zone Act (1994) establishes a free zone and a commission to oversee this zone. Any person or entity may apply for a licence to conduct commercial activity the free zone. Those licensed entities are exempt from taxes and duties for exports from the free zone to a destination outside the country. The Commission may charge royalties to these entities, and may make regulations governing the products created in the free zone. The total size of the zone is 90 acres with the possibility of expansion. There are only two enterprises located at the zone. These are The American University of Antigua and the government-owned Antigua and Barbuda International Institute of Technology.

Access to credit and capital

Antigua and Barbuda Agricultural Development Corporation Act (1978 consolidated 1992) establishes the Corporation to stimulate development of agriculture and carry out, operate and participate in such Agricultural projects as the minister may approve. It is charged with developing and managing plantations and other agricultural land for purposes of developing the private sector, and preparing and administering agricultural development schemes as approved by the minister. The Corporation has regulation-making powers for purposes of carrying into effect provisions of this Act.

Antigua and Barbuda Development Bank (Amendment of 1974 Act) Act (2003) adds powers to the Bank such as the ability to accept on deposit any funds or securities or make or negotiate loans, advances or provide credit to the Government, any public or statutory authority, cooperative or any person or body whether within or outside the country. The underlying Act establishes and defines the functions of the Bank as a corporate body responsible for providing development capital in the country and also specifically in the agriculture sector. For purposes of this Act, an “agricultural development enterprise” means an agricultural or livestock enterprise operated on a commercial basis. The Bank may underwrite shares, guarantee loans, sell investments,
carry out transactions related to unit trust schemes and mortgages, provide mortgage loans, and furnish financial advice.

**Development Fund Act (1976 amended 1992)** establishes a fund within the Treasury department of the country and defines its financing and internal organisation. While the Act does not specifically state that funds are geared to agricultural development, it is foreseeable that all proceeds the fund receives for purposes of developing agriculture would be disseminated from this special fund.

**Business formation**

**Small Business Development Act (2007)** promulgated to promote small business in the territory, the Act sets forth criteria to qualify as a small business and requires entities to register and be approved by minister and Registrar of Intellectual Property and Commerce, though controlled by the country's investment authority. Small business may apply for various benefits such as technical assistance, and apply for loan guarantees.

**Qualify as a small business:** To qualify, small business must have no more than 25 employees, possess capital investment of no more than $3m, total sales of no more than $2m be majority owned by citizens, or if not citizens, the business must be mainly for exported products, have a minimum investment of $500,000, have 50% of employees be citizens, 40% of goods and services procured for business come from the country.

**Concessions:** Minister may grant (1) exemption from or reduction of duty on importation/purchase of raw materials, building fixtures/materials, appliances, tools, furnishings, machinery, equipment, and vehicles for use in operation of business; (2) income tax for period not to exceed five years and three years for non-residents; (3) reduction of property tax of up to 75%; (4) and reduction/ exemption from stamp duty-up to 75% for non-residents.

**Loan guarantees:** Act permits small business to apply for a loan from any bank or financial institution by virtue of licence issued under Banking Act or Credit Scheme by the country's Development Bank. Plus, where small business can not provide full security to the Development Bank, the bank may guarantee the insufficiency of security not in excess of $100,000.

**Ease to register:** Must pay $100 fee, supply application to Authority, and a copy of the declaration issued to the Gazette. In addition, the small business must submit tax returns, pay medical benefits, education levies, and social security.

**Small Business Development Regulations (2008)** set forth the prescribed small business activities that qualify under the Act which include agriculture, forestry, fishing and aquaculture. Regulations also authorise technical assistance by a designated body to provide training and assistance on product, package, and label design, quality control maintenance, marketing training for local and exported products, assistance for businesses seeking to participate in overseas trading shows, business plan preparation, initial financing and business management, feasibility studies, accounting or budgetary analysis, and production management.

**Quality measures, standards, and protection**
Animal (Diseases and Importation) Act (1953 amended 1989) provides measures for the quarantine, control and eradication of diseases affecting all kinds of animals, including poultry, livestock and their related products. The Act authorises the inspection, slaughter of diseased animals, compensation, regulation-making powers of the minister and powers of enforcement of inspectors. The Act also prescribes offences and grants powers to the minister to apply provisions of this Act or rules made under this Act to poultry. Imports of animals, poultry, livestock, and poultry products must abide by this Act as well as Animal Health Legislation (1992). These products must be accompanied by a certificate from the veterinary authority of the exporting country. There are no additional restrictions on the import and sale of animals that have been fed hormones (or their products). The country has notified the Sanitary or Phytosanitary (SPS) Committee of the World Trade Organisation (WTO) of its (Draft) Animals (National and International Movement and Disease Prevention) Act, which has not yet been enacted, but would supersede the legislation. A draft Food Safety Act has also been notified to the WTO, which proposes to regulate the sale of food by producers, processors, manufacturers or handlers of food, as well as the import and export of food into or from Antigua and Barbuda.

Pesticides and Toxic Chemicals Controls Act and its Regulations (2008) establishes the Pesticides and Toxic Chemicals Control Board and defines the functions of the Board, provides for the designation of the Registrar of Pesticides and Toxic Chemicals, and provides rules relative to handling and marketing of pesticides and toxic chemicals. The Act details the disqualification and the confiscation of certain pesticides. The Board controls the importation, sale, storage and use of pesticides. The Board shall, among other things: (a) provide advice to the minister; (b) determine applications for registration, licences and research permits to be granted under this Act; and (c) certify pest control operators. Use of pesticides and toxic chemicals requires a licence. The Act further provides for the appointment of analysts, inspectors and medical examiners, and rules for record keeping and reporting and appeals process. The Act authorises the regulation-making powers of the minister and includes a list of prohibited and controlled products.

Plant Protection Act (1941 amended 1992) and its Regulations (1959) prescribes measures for the prevention of spreading of pests and diseases among plants. This Act also provides for the appointment of a Chief Plant Protection Officer and regulation-making powers of the minister for purposes of protecting plants. The Act further provides, among other things, for the notification of pests and diseases declared to be pests and diseases by the minister; provides for powers of authorised officers including the power to put nursery stock under quarantine; and prescribes offences. Imports of plants and unprocessed products must be accompanied by a phytosanitary certificate issued by the Department of Agriculture of the exporting country stating that the articles are free from pests and diseases, and that they have been subjected to any required treatments. Imports of live plants and all unprocessed plant products and commodities and non-commercial untreated seeds are subject to technical quarantine regulations and control, depending on country of origin and presence of particular pest and diseases of quarantine importance to the country. The importation of soil or products containing soil is prohibited. Imported plants should be free of soil and are liable to examination by an officer of the Plant Protection Unit. A pest risk assessment is conducted on each requested commodity before a decision is made whether the risk of importation is acceptable (minimal or non-existent). The importer is issued an import permit from the Ministry of Agriculture for each shipment and is instructed to communicate to the exporter the import requirements of the country. Plant quarantine inspectors are responsible for conducting inspections. In 2005, Antigua and Barbuda notified a (Draft) Plant Protection
Act to the Committee on Sanitary and Phytosanitary Measures. This Act is not yet in force, and the prevailing legislation is still the Plant Protection Act, 1941.

**Praedial Larcency Act (1954 amended 189, consolidated 1992)** prescribes measures to prevent or suppress a felony of the Act involving praedial produce including crops and cattle. The Act authorises the Governor-General to create Community Committee for designated areas to assist in the prevention and suppression of praedial larcency to include employing persons to patrol designated areas and pay rewards for information on suspected incidences. The Act further defines powers of enforcement of authorised officers and provides for judicial procedures, rules of evidence, etc. in relation with the prosecution of the offences defined in this Act.

**Veterinary Act (1987 revised 1992)** establishes and sets out the functions of the veterinary board, the registration of veterinary surgeons and health assistants, appeals process, and the authority to promulgate regulations under the Act.

**Properties devoted to agricultural land**

See Antigua and Barbuda Agricultural Development Corporation Act (1978 consolidated 1992) in the “access to credit and capital” section.

**THE BAHAMAS**

The agricultural sector constitutes a small portion of the Bahamas' annual GDP, which at the time of the in-country field study, contributed approximately (5%) of the GDP. The financial services sector is the second largest sector in the Bahamas contributing between 15-20% of the country’s GDP, second only to the tourism sector (80%). The country has a number of legislative measures regulating this industry, including many implemented just 10 years ago. The rationale for the robustness of this legal framework appears to be the fact that the financial sector is developed and additionally, it requires laws to govern and regulate the industry. No doubt the importance should not be underrated as it is the foundation for growth in other sectors it supports, such as construction, tourism, housing, etc. The opportunity appears to be in the linkages between the financial sector and agriculture, which would appear to be a logical extension to strengthening the agricultural sector. As observed in many other countries in the region, agriculture related development banks, small credit unions, etc., all played an integral role in the development of rural communities, rural entrepreneurs, and rural business centred on agriculture. Credit unions in the country experienced rapid growth and are technically financial cooperatives which lead the sector and control millions of dollars in the Bahamas. Further, as tourism remains the largest sector in the region, it appears that there could be some linkages between consistent produce supplying hotels with the items needed. Though, as it now stands, the country imports 90% of its non-oil imports from the United States. The country has no direct export financing, subsidy or promotion policies, except for limited “free zones”.

**Legal and business enabling environment**

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36 FAO (2009) Report on Rapid Assessment of the Agriculture Sector of the Bahamas

37 ibid
Legal

Industrial agriculture: To date, there were no laws found specifically addressing industrial agriculture.

Non-traditional agriculture and fisheries: All fruits and vegetables must be packed in licensed packaging houses and are subject to inspection prior to exportation. All fishing vessels (local and foreign) are required to have a licence to operate in the territory. Fisheries regulations also prescribe rules for handling, and packaging seafood and require HAACP analysis. There are no other specific regulations on agriculture. Of the in-country field studies, the Bahamas was one of the countries with the least regulation on this industry, which is indicative of the industry's contribution to the economy.

Customs, taxes and other financial measures: The majority of duties are on an ad valorem basis. Most, if not all, imports require a licence for entry into the country. Exports require a licence as well. Few licences are administered by the customs department, while most are under the authority of the various ministries or government agencies. The country has most favoured nation tariff rates for products imported from countries with which the country has entered into reciprocal agreements. Under the Tariff Act, most agricultural products are subject to tariffs ranging from 10-35%. The customs management system is currently under reform to eventually use an automated system to lessen paperwork and ensure revenue collection and cut down on tax evasion loopholes and smuggling. The are duty exemptions as well.

Access to credit and capital: The country provides for agricultural development through its Development Bank which has a special small business advisory to make recommendations on loans. Legislation also supports a small business loan guarantee by the government for those borrowers without full security. There is also an agricultural credit guarantee fund which provides loans as well. These are means by which participants in the agricultural sector can have access to capital.

Business formation: The Bahamas provides duty exemption for materials used to build agricultural factories but requires that these entities register with customs. Further, rules governing cooperative societies like being exempt from income tax.

Quality measures, standards, and protection: The Bahamas has a comprehensive food act which regulates the manufacturing, importation, placing on the market and offering for sale of food. Several laws regulate the standards for meat products for sale and export, and prescribe restrictions for their import. Through these laws, certain imports are strictly prohibited, such as poultry importation from Haiti and bananas and citrus imports from certain Caribbean countries.

Properties devoted to agricultural land: To date, there were no laws found specifically addressing properties devoted to agriculture. However, there are government policies to use agricultural land in order to decrease the country's dependence on tourism. Most of the agricultural land is owned by the government and is under the authority of the Ministry of Agriculture. There are several projects that have earmarked government land for agriculture and encourage existing farmers to market their products.

Business
One prevalent programme to attract investment is through the establishment of a free trade zone in Freeport. Businesses in this zone pay no taxes on profits, capital gains, inheritance, income, earnings, distributions, and imported and exported goods. Import duties and taxes on real estate in the zone have been waived through 2015. The International Business Companies Act of 1989 and the Companies Act of 1992 have made it easier establish a commercial presence in the country. These attributes to the economy will be further explained in Section 3.1.3. Persons manufacturing goods can enjoy exemption from the payment of customs duties on building materials, equipment and approved raw material, business licensing fees, and real property taxes for periods up to 20 years. Such exemptions are afforded under legislation such as the Export Manufacturing Industries Encouragement Act, The Industries Encouragement Act, The Tariff Act, the Free Trade Zone Act, and The Agricultural Manufacturers Act, to name a few.

In order to help agribusinesses enhance their competitiveness by improving their access to markets and market information, facilitating access to finance, technology, and business services, and formulating business and market strategies it is apparent that the Bahamas Agricultural and Industrial Corporation (BAIC) would be tasked with this initiative. Additionally, proactive economic growth and development policies of the government are guided by the Bahamas Investment Authority (BIA), established to minimize the red tape for investors. This entity was set up as a one-stop shop to simplify investment in the country. BIA is tasked with developing investment policies, promote investment, evaluate project proposals, and monitor projects and provide support.

There is an opportunity here to develop the thousands of acres of land earmarked for agriculture and create an export platform and market products for import replacement, which the country must do since has a sizeable trade deficit. BIA could work in tandem with the country’s Ministry of Agriculture to promote private investment in these lands. Further, BAIC has the capacity to provide technical assistance to farmers wishing to participate in programmes to promote agricultural development. BAIC, like many other institutions like it in other countries could provide the marketing platform for agricultural produce both domestically and abroad.

**Summary of laws**

*Industrial agriculture*

No measures specifically addressing industrial agriculture.

*Non-traditional agriculture and fisheries*

*Agricultural Products (Fruit and Vegetable) Rules (1937 consolidated 2007)* requires all fruits or vegetable be packaged in a licensed packing house prior to being exported. All fruit and vegetables intended for export are subject to inspection by an officer of the ministry who may block the shipment of any such produce which in his or her discretion is unsuitable for exportation.

*Food (Seafood Processing and Inspection) (Amendment) Regulations (2004)* amend the regulations by making them applicable to commercial fishing vessels; prescribing hygienic and other requirements for the handling of seafood on commercial fishing vessels; adding thermometer requirements; and amending rules regarding the maximum tolerance levels for toxic elements in seafood products. “Seafood” is defined by these...
Regulations and shall not include marine mammals or birds. Inspection of seafood shall be carried out by authorised officers in accordance with these Regulations. The Regulations also set out requirements for the importation of seafood and the licensing of factory vessels, seafood holding stations, seafood processing plants and seafood export plants. The regulations also prescribe rules governing the handling, packing and labelling of seafood. Persons handling seafood shall, among other things, carry out HACCP (Hazard Analysis Critical Control Point) analysis. Processors of seafood shall implement sanitary standard operating procedures.

**Onions (Export) Rules (1942 amended 1987, consolidated 2007)** requires that onions be packaged in a licensed packaging house prior to being exported. Further they must be graded and packed by licensed persons. The Rules also set forth quality standards for onions, specify requirements for the grading, packing and labelling of onions intended for exportation and provide for inspection.

**Fisheries Resources (Jurisdiction and Conservation) Regulations (1986 consolidated 1997)** are measures to conserve and manage fishery resources and establish the Bahamas' jurisdiction over such resources. The Regulations enforce closed seasons, such as the closed season for crawfish, all turtle species and stone crab. Other provisions concern the protection of marine mammals, the export of sponges, permits to culture fishery resources, sport fishing, process and preservation of fishery resources and fishery products, and the quality control of processed or preserved fishery resources and fishery products, permits and licences (with sample applications appended thereto). Quantitative restrictions have been in place on the export of conch meat for conservation reasons.

**Fisheries Resources (Jurisdiction and Conservation) (Amendment) Regulations (2005)** amend the regulations governing the taking, landing, processing, sale or offering for sale of a specified fish species.

**Fisheries Resources (Jurisdiction and Conservation) (Amendment) Regulations (2007)** temporarily prohibits the taking, landing, processing, sale or offering for sale of a fish commonly known as “the Nassau Grouper.” These activities are allowed in respect of fish for which the taking or landing is carried out with approval of the Director of Fisheries for scientific research purposes.

**Customs, taxes, and other financial measures**

The Bahamas Investment Incentives Act (1991 consolidated 1996) provides exemptions from customs duties and stamp taxes on imports for developers of enterprises established in designated Family Islands, as well as exemptions from customs duties on exports of goods produced by the licensed enterprise:. Enterprises may engage in manufacturing, processing, assembling, warehousing, storage, trans-shipment, loading, unloading, trucking and stevedoring. Beneficiary developers must meet certain conditions of government agencies by providing, for example, free rent on government leases. Gorda Cay is the only region that has been designated as a development zones authorised under this Act.

**Customs Duty (most favoured nation tariff) Act (1957 amended 1974)** provides reduced tariff rates for products imported from countries with which the country has entered into reciprocal agreements. The technical application of this rule would include the United States, and more recently, Europe since becoming a signatory to the EPA.
**Customs Management Act (1976 amended 2009)** governs the administration and operations of the customs authority and the control of imported goods or goods destined for exportation or transhipment. The minister may prohibit or restrict the exportation of any goods to any specific place. The Act further prohibits the importation of, among other things, infected cattle, sheep or other animals and hides, skins, horns and hoofs or anything which the Governor-General may on sanitary grounds by order prohibit to be imported and meat, provisions, fruit and vegetables and any articles intended for human food which are unfit for human consumption. The government intends to enact by mid-year 2011, new reforms to the Act, which would simplify procedures and make the department more efficient. For example, adopting and enforcing World Customs Organisation (WCO) standards, bringing a legislative framework passed in 1976 into the modern era, and use an Automated System to lessen paperwork and ensure revenue collection and cut down on tax evasion loopholes and smuggling.38

**Excise Act (2008)** addresses the imposition and exemption from duty tax rates. Duty exemptions exist for capital equipment for agricultural cooperative societies. Duty exemptions also exist for imports of raw materials and equipment or farmers (and horticulturalists). There are four rates of duty under the Excise Act with 45% being the most common. However, agricultural goods receive a much lower rate on average.

**Export Control Regulations Act (1955 amended 1987)** requires a licence to export goods from the country. However, there is no comprehensive licensing system, as there most licences are granted within the various ministries themselves and not a centralised customs unit. The Act authorises goods to be seized and forfeited.

**Import Control Regulations Act (1955 amended 1987)** requires a licence for all goods imported into country with the exception of gifts and personal effects, amongst other items. Few licences are administered by the customs department, while most are under the authority of the various ministries or government agencies. However, the customs department performs customs’ clearance along with the ministries. Import quotas and licensing procedures apply to most agricultural products. Import licences are issued for certain agricultural products based on forecasts of deficits in domestic supply, developed in consultations with the relevant industry.

**Stamp Tax Act (1925 amended 2000)** places a $10 (Bahamas dollars) stamp duty on export transactions and shipments other than ordinary parcels, clothing and tourist items. Agricultural products are subject to a stamp tax of 2%, though the stamp tax is higher for some products, such as wine. Some products, such as butter, fresh beef, apples, rice, wheat flour and cooking oil enter free of duty.

**Tariff Act (1966 amended 2009)** is divided into the following four schedules: Schedule 1 provides the duty rate levied on all imported goods and contains 5,841 tariff lines; Schedule 2 provides the maximum variable rate of duty for the agricultural, marine and manufactured goods covered by the about 500 tariff lines contained therein; Schedule 3 provides the actual duty rates that apply to the goods listed in Schedule 2; Schedule 4 includes a list of entities that are entitled to import certain goods free of import duties and there is an extension to concessions for small businesses. Schedule 2 is the ceiling rate for a number of products that are normally taxed at the rates provided by Schedule 1. Under this Act, most agricultural products are subject to tariffs ranging from 10-35%. The

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Act lists imports, such as raw materials and equipment for fishermen, farmers, and cottage industries/light manufacturing which are exempt from duties.

**Access to credit and capital**

**Bahamas Development Bank Act (1974 amended 1999)** establishes the Bank and sets forth its functions, which is to, amongst other things, promote the industrial, agricultural and commercial development of the country through financing enterprises. The Bank is authorised to give out long, short and medium-term loans and grant small business loans. A special small business advisory committee is in place to advise and make recommendations regarding those loans.

**Guarantee of Loans (Small Business) Act (1988)** provide for the guarantee, by the government, of loans by approved banks and insurance companies or other approved lender for small business development throughout the country.

**Business formation**

**Cooperative Societies Act (2005)** governs the incorporation and function of co-ops by regulating the process by which co-ops are registered, the manner in which dividends and profits are distributed to its members and being exempt from income tax. The Act also provides in respect of claims of societies towards its members arising from debt and relative charge on agricultural or other produce of members by the society.

**Agricultural Manufactories Act (1913 amended 1999)** prescribes the rules for registering with the Comptroller of Customs as an agricultural factory. These entities are free from import duties related to machine, tools, supplies and materials necessary to build, repair and maintain the factory. For purposes of this Act, an “agricultural factory” means a factory used exclusively for the purpose of manufacturing, preserving, packing or otherwise preparing for sale or export (a) any agricultural, floricultural or horticultural produce; (b) any agricultural, floricultural, horticultural or marine products which the Governor-General may from time to time by order specially declare may be manufactured, preserved, packed or otherwise prepared for sale or export, for such limited time as may be mentioned in such Order.

**Quality measures, standards, and protection**

**Animal Contagious Diseases Act and its Import Control Regulations (1966 amended 2007)** place restrictions on, and provide rules for, the importation of animals, including birds and bees, into the Bahamas. Importation of animals requires a permit to be obtained from the Director of Agriculture and animals are subjected to inspection upon arrival. Animals that are diseased or suspected to be diseased shall be removed from the country or quarantined.

**Animal Contagious Diseases (Prohibition of Meat Imports) Order (1986 consolidated 2001)** prohibits the importation of any meat or any by-product of meat, from any place other than those specified in the Order. The prohibition shall not apply to meat or any by-product of meat which has been cooked or canned except meat or by-products of meat produced in specified places including the United Kingdom.

**Animal Contagious Diseases (Prohibition of meat Imports) (amendment) Order**
(2002) amends the order by deleting France and Ireland, and adding Denmark to the lists of countries exempted from the prohibition to import meat or meat products.

Animal Contagious Diseases (Prohibition of Imports) Order (1976 consolidated 2007) restricts imports of various non-edible animal products, raw meat and eggs for hatching. Importation of these items requires a permit from the Director of Agriculture.

Food Act (1985 consolidated 2007) regulates the manufacturing, importation, placing on the market and offering for sale of food and prescribes offences. The Act establishes the Food Board, defines the functions of the minister responsible for food for purposes of this Act and safeguards the functions of the Minister of Health in relation to food. The Act prohibits the false or misleading labelling and advertisement of food and preparation of adulterated or injurious food. Other offences include the preparation of sub-standard food, sale of food that is not of the quality, nature or substance as demanded by the purchaser and unhygienic preparation of food. The Act sets out powers of inspection of authorised officers and the regulation-making powers of the minister.

Plants Protection Act (1916 consolidated 2007) makes provision for the prevention of the spreading of plant diseases and pests, by authorising the appointment of inspectors, and by prohibiting the importation of plants, or plant-related material, that do not comply with the rules. The minister may also regulate movement and other handling of plants and plant-related materials such as soil, but may also restrict the movement of persons or animals for purposes of this Act. The Act further specifies powers of inspectors and defines offences.

Plants Protection (Restriction on Imports of Fruits, Vegetables, Flowers, Plants and other Propagative Materials) (Pink Mealybug) Order (1997 consolidated 2007) prohibits the importation of any fruits, vegetables, flowers, plants or other propagation materials from St. Lucia, St. Kitts and Nevis, St. Maarten, and Trinidad and Tobago.

Plants Protection (Imports of Citrus Fruit, Plants and other Propagative Material from Florida) Order (1993 consolidated 2007) restricts importation of citrus fruits, plants or seeds from Florida so as to prevent the introduction of canker. Plants and fruit must be certified in to be free of the disease and seeds of citrus plants shall be treated in the US (country of origin) and marked as specified.

Prohibition of the Importation of Plants (State of California) Order (1982 consolidated 2007) prohibits the importation of plants, trees, plant materials or packing materials from California that come into contact with such items unless accompanied by certificate issued by the United States Department of Agriculture or the Department of Agriculture of the State of California stating that the imported plant is free from any harmful or dangerous disease or insect. “Plants” includes also plants or parts of plants intended for human consumption.

Order Made Under the Plants Protection Act (1918 consolidated 2007) prohibits all importation of plantains and banana plants so as to prevent the spreading of infectious diseases affecting plants.

Prohibition of the Importation of Plants Order (1971 consolidated 2007) strictly prohibits, in order to prevent infectious diseases, the importation of all varieties of citrus fruits, mangoes, avocados, fresh vegetables and all fruits with soft pericarp (excluding
bananas and plantains) from several Latin American and Caribbean countries, including Bermuda, Dominica, Jamaica, and Trinidad.

**Prohibition of Importation of Poultry Order (1953 consolidated 2007)** prohibits the importation of poultry from Haiti.

**Public Market and Slaughterhouse Act (1947, amended 1987, consolidated 2007)** provides that public markets and slaughterhouses shall be under the control of the minister, who may grant licences and permits for the sale of food. The minister may regulate these markets and slaughterhouses, and inspection must be performed by officers of the Health Department.

**Public Markets and Slaughterhouses Rules (1952 amended 1987, consolidated 2007)** concern the operation of specified public markets and slaughterhouses. The Rules, among other things, specify requirements regarding water supply, hygiene of markets and slaughterhouses and slaughtering of animals and also concern the humane killing of animals at slaughterhouses to which these Rules apply. The presence of certain animals at markets or slaughterhouses is restricted.

**Properties devoted to agricultural land**

No measures specifically addressing properties devoted to agricultural land.

**BARBADOS**

Historically, sugar has been Barbados' single largest agricultural export, however, this product no longer benefits from a guaranteed price and market as it is exported duty-free and quota free to Europe. The largest contributor to the country's GDP is the tourism sector. Barbados no longer administers a tariff quota regime for agricultural products; instead it applies the in-quota bound rates to the respective imports. Two state entities have monopolies on the importation of chicken and turkey wings, and raw sugar respectively. The sugar industry, traditionally Barbados main agricultural export activity, suffers from high costs and has shrunk considerably due to the reduction in the preferential price offered in export markets.

At the time of the in-country field study, the stakeholders identified that one of the biggest opportunities for increasing exports as well as consumption of domestic agricultural products was to create a food group within the Barbados Chamber of Commerce which would devote time to lobbying for space on the shelves of stores. This factor raises an important point in analysing the existing legal framework, which is that regardless of the policies and laws in place that anticipate opportunities for agricultural development, there needs to be an institutional push to implement these policies. For example, though Barbados’ investment regime is generally open to foreign investors (i.e. CARICOM citizens and companies are guaranteed the same treatment as domestic investors), however, the institutional push is geared towards the country’s largest sector, tourism. There is an opportunity to increase investment in agriculture, as mentioned later, by increasing awareness of any business opportunities supported by a legal framework.


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Legal and business enabling environment

Legal

Industrial agriculture: Other than cotton, domestic legislation to assist industrial agriculture, lie within the sugar industry. The legislation has created a Research and Development Fund & Committee, and Sugar Workers’ Provident Fund. The Act controls the production and processing of sugar cane and the exportation of sugar. At the time of the in-country field study, the government was participating in a regional effort to diversify oil into alternative energy (i.e. biofuel). It is foreseeable that the existing legislation could support the domestic efforts to expand into this industry.

Non-traditional agriculture and fisheries: The Barbados Agricultural Development and Marketing Corporation (BADMC) is the sole importer of poultry, turkey and grants licences under this function. BADMC is also in charge of marketing and processing produce under the Act establishing it. Dairy is also regulated by requiring licensing for processors and sellers. All fruit leaving the country must be packaged and labelled under supervision. Inputs, such as fertilisers and feeding stuffs are also heavily regulated. At the time of the field study, stakeholders in the field found the registration process delays the industry, which could be resolved by creating more staff through a board or committee like in other countries or create linkages with University labs that can conduct testing. They also identified opportunities for sourcing inputs like this in other CARICOM countries. Lastly, the fisheries legislation creates a Fisheries Advisory Committee and requires registration and inspection of vessels. Although the legislations provides for it, no licences are actually required for vessels. The regulations also contain HAACP requirements.

Customs, taxes and other financial measures: Import duties range from 0-20% of the customs value. Agricultural products are under one of the exceptions which include bound rates which range from 40-196%. Excise taxes are not charged on agricultural products. The value-added tax is charged at three rates: 15%, 7.5%, or 0%, which most agricultural products fall under.

Access to credit and capital: The country provides for agricultural development through a fund which finances specific projects instead of individual farmers. There is also a government funded Agricultural Guarantee Payment Fund, where BADMC operates as a factor and the agricultural producer groups are factor buyers. Through this vehicle, funds are provided to individual farmers at a rate of charge at approximately 3-5% a month.

Business formation: Legislation provides for the creation of agricultural co-ops and small businesses with benefits such as incentives, loan guarantees and technical assistance.

Quality measures, standards, and protection: All imports of animals require a permit and will be subject to inspection. Legislation addresses the establishment of the fisheries committee, the issuance of licences for foreign and local fishing vessels. All imported food is required to be inspected by a public health inspector. Pesticide control laws place restrictions on and provide rules for the manufacture, importation, storage, use, distribution, sale or offering for sale any pesticide and provides in respect of the approval of a pesticide by a Board for use.
Properties devoted to agricultural land: Qualified tenants that have been cultivating an agricultural holding may purchase the freehold of that land. A Rural Development Commission is authorised to allocate public land to potential farmers. Lastly, BADMC is authorised to manage plantations and other agricultural land vested in BADMC on a commercial basis. At the time of the in-country field study, BADMC managed about 70-80 acres per year for onions with 10 large farmers and approximately 25 small farmers and was working on developing a drying/storage facility.

**Business**

The agribusiness enabling environment is made possible through two state-owned enterprises, the BADMC and the Barbados Dairy Industries Limited (known as Pine Hill Dairy). The BADMC, in addition to having a monopoly on the imported poultry, sugar, and raw onions and controlling domestic prices, is tasked with promoting exports. During the in-country field study, the team was informed that the BADMC was in charge of many other activities that enabled agribusiness in the country. BADMC has extension services in the rural areas and provides management and marketing support for farmers. There is a land lease programme for 1,400 acres in areas in the North. There is also a young entrepreneurs’ programme with the goal to change youth mindsets about agriculture as a real business. In addition, there is a promotion unit dedicated to promoting local foods through various outreach activities.

The country also has a small business association as well a youth business trust to promote private sector growth. In addition, the Barbados Chamber of Commerce and the Barbados Investment and Development Corporation (BIDC) that are not specifically geared towards agribusiness development, but have the potential to develop tools to promote investment in agriculture. For instance, during the in-country field study, the Ministry of Agriculture informed the team that in order to promote value-added products in the local and international markets, they are exploring the option of a food group/committee within the Chamber of Commerce, which would lobby for spaces on the shelves of stores. Currently, the small business division of the BIDC provides a variety of technical assistance that would if geared towards the sector would help to grow and sustain agribusiness. Their services include the: development of business plans and financial projections; assistance with the sourcing of finance; surveys and profiles for selected markets; technical and financial feasibility analyses; the preparation and dissemination of project profiles; assistance recruiting and training required staff; acquisition of available fiscal incentives; and identification and acquisition of suitable factory/workshop space.

**Summary of laws**

**Industrial agriculture**

**Sugar Industry Act (1982, amended 2000, consolidated 2002)** concerns the development of sugar cane production and for this purpose establishes the Research and Development Fund, the Sugar Industry Research and Development Committee and the Sugar Workers’ Provident Fund. The Act also introduces measures to control the production and processing of sugar cane and the exportation of sugar. The Committee shall assess the work programmes and results of organisations having research and development functions in the growing, harvesting, handling and processing of sugar cane and carry out other functions assigned to it under this Act.
**Non-traditional agriculture and fisheries**

Barbados Agricultural Development and Marketing Corporation Act (1993 consolidated 1995) establishes the BADMC and defines its functions and powers to include: (a) developing agriculture and to operate and participate in such agricultural projects as the minister may approve; (b) facilitating government policy with respect to rural development and land reform; (c) managing plantations and other agricultural land vested in BADMC on a commercial basis; and (d) stimulating the production, marketing and processing of produce.

Dairy Industry (Regulation and Control) Act (1968 consolidated 1988) ensures the hygienic handling of milk and requires dairy keepers, milk processors and milk sellers to be licensed. The Act also establishes a Milk Advisory Board which makes recommendations to the minister who has regulation-making power. For purposes of this Act, “dairy keeper” means a person who sells or offers for sale milk produced by milk animals owned or maintained by him or her; a “milk processor” means a person who processes milk or milk products intended for human consumption. The Act also requires inspections, and includes an appeals process for decisions regarding licences.

Exportation of Fruit Act (1940 consolidated 1949) provides rules to ensure the quality of fruit to be exported from Barbados. The Act requires inspection and certification of fruit, and also requires all fruit intended for export to be labelled and packaged under the supervision of a fruit inspector. The Chief Agricultural Officer is authorised to destroy fruit attacked by pest and disease.

Fertiliser and Feeding Stuffs Act (1961 consolidated 2008) requires fertilisers to be registered and inspected. Further all fertiliser and feeding stuffs dealers must be registered with the Chief Agricultural Officer. All traders must furnish statutory documentation describing the ingredients in the fertilisers and feed stuffs. Purchasers have the right to have fertilisers inspected and analysed. The Act also governs the labelling and packaging of fertilisers and feeding stuffs, as well as the importation of them.

Fisheries Act (1993 amended 2000) governs the management and development of fisheries in Barbados and appoints a Chief Fisheries Officer and a Fisheries Advisory Committee. The Act requires licences for foreign and local fishing vessels as well as royalties and fees, amongst other charges to be paid.

Fisheries (Management) Regulations (1998) authorises the minister to designate prohibited fishing methods and species of fish which may not be harvested during the closed season and in closed areas.

**Customs, taxes, and other financial measures**

Environmental Levy Act (1997) requires that a levy is added to any other taxes on goods and is charged at the rate of 1% of the customs value on most goods. A very limited number of goods carry a specific rate of environmental levy, which do not include agricultural goods.

Value-added Tax Act (1997) is charged at the rate of 15% (concessionary tax 7.5%), which is compounded and is charged on the total of the customs value and any other
import taxes. Some goods are zero-rated. Persons required to register under the Act are anybody who carries on a taxable activity and whose annual gross standard rated, concessionary-rated and zero-rated supplies are BD$60,000. Goods and services fall under exempt status. Zero-rated supplies are goods and services that are taxable but at 0%. The agricultural products that fall under this category are: exported goods and services; livestock, poultry, bees and fish used to produce food; seeds and plants used in propagating plants for food or animal feeding stuffs; prescribed goods used by the fishery enterprise for exclusive use by the enterprise in commercial fisheries; and sugar cane by sugar cane farmers to the Barbados Agricultural Management Company Limited.

**Access to credit and capital**

Agricultural Development Fund Act (2001 consolidated 2002) establishes the Agricultural Development Fund and provides for its administration. The revenue of the Fund shall be administered and managed by a specified corporation and be used to finance projects and programmes that are designed for the improved development of agriculture including sugar production, the cotton industry, livestock production, fisheries and horticulture. The Act also establishes a Management Committee. The Committee shall evaluate and approve proposals for projects to be financed by the Fund.

Agricultural Aids Act (1905, amended 2000, consolidated 2002) makes provision in relation to the granting of loans to “owners,” meaning any person for the time being legally charged with the cultivation, or the receipt of the rents and profits, of any land, including life tenants, guardians, trustees and executors but not persons appointed by any court to take charge of, manage and cultivate, or receive the rents and profits of, land in Barbados. Loans may be granted for: (a) the purpose of carrying on the general cultivation and management of sugar plantations and all other real estate or property; (b) the purchase of stock and manure and other necessaries; (c) paying taxes; and (d) other specified expenses.

Barbados Agricultural Management Co. Ltd. (Sugar Bonds' Guarantee) Act (1994 consolidated 1995) allows the minister, with the approval of parliament, to provide guarantee for the payment of principal and interests necessary for the redemption of bonds issued for the financing of the sugar industry. The Act also establishes the Sugar Industry Revitalisation Fund. Monies raised from bonds shall be paid into the Fund. The Fund shall be used by the Barbados Agricultural Management Co. Ltd. to finance operations of the sugar industry.

**Business formation**

Cooperative Societies Act and its Regulations (1993 consolidated 2008) makes provision for the constitution and registration of cooperative societies, their privileges and duties, operation, dissolution or division, amalgamation of societies, liability of members and the settlement of disputes between societies or its members. Co-ops must be registered with the Registrar of Cooperative Societies.

Small Business Development Act (1999 consolidated 2002) provides for the development of small business, including business in the field of agriculture, forestry, aquaculture and fisheries. The Act provides for the approval of small business status and the registration of approved businesses. Small business may benefit form incentives, loan guarantees and technical assistance under this Act.
**Quality measures, standards, and protection**

Animals Diseases and Importation Act and its Regulations (1951 consolidated 1997) addresses regulations to control the spread of diseased like swine fever, anthrax, and other diseases. All imports of animals require a permit and will be subject to inspection. The Act addresses the establishment of the fisheries committee, the issuance of licences for foreign and local fishing vessels, conservation measures for certain species, prohibitions on lobster fishing & catfish, and related penalties. The senior veterinary officer may grant licences to import animals. Further, the minister may appoint quarantine depots for animals.

Control of Standards Act (1981 consolidated 1985) Act authorises the minister to declare standards, such as labelling for all food products. Persons are not permitted to produce, sell, import, export or use a commodity until it conforms to the National Standards Institution’s specifications.

Food and Drugs (Adulteration) Act (1933 consolidated 1958) introduces measures so as to prevent the practice of adulteration in the sale of food and drugs. The Act, among other things, defines various offences of adulteration of food, also in relation with the preparation and labelling of food. Special provision is made with respect to the importation and sale of milk products. The Act provides for sampling and analysis of products and prosecution of offences.

Food Hygiene (Amendment) Regulations (1999) require that all imported food be inspected by a public health inspector. If food is condemned the inspector shall issue a Certificate of Condemnation Food in the form as set out in the (new) Schedule. Food unfit for human consumption shall be detained and analysed by the government analyst.

Markets and Slaughterhouses Act and its Regulations (1958 consolidated 1967) and its Regulations (1958 consolidated 1990) establish public market and slaughterhouses and provide rules for such public places. They must be licensed and inspected. All rules regarding operation and control also apply to fish markets, vending points, butcher shops, fish sellers, cold storage, etc. All public markets shall be under the control of the chief supervisor. Animals located within five miles of a public slaughterhouse shall be slaughtered there. The chief supervisor has the power to destroy unwholesome meat, fish, and poultry, under section.

Pesticides Control Act and its Regulations (1974 consolidated 1988) place restrictions on and provide rules for the manufacture, importation, storage, use, distribution, sale or offering for sale any pesticide and provides in respect of the approval of a pesticide by the Board (established by this Act) for use. The manufacture, importation, storage, use, distribution, sale or offering for sale any pesticide that is not approved by the Board shall be prohibited. The Board may exempt pesticides from the requirement of approval for scientific purposes. The Regulations also require a licence to be issued by the Board for the manufacture or importation of pesticides. Regulations also prescribe rules relative to the labelling of all pesticides except pesticides manufactured.

Plant Pest and Disease (Import Control) Act (1995) addresses the issuance of import and export permits, inspector authority, and penalties. Permits are required for importation of any restricted item under this Act. In addition, these items must be inspected before leaving port. Section 9 makes provision for the export of plants and the
issue of permits to exporters in the form adopted by the International Plant Protection Convention.

**Plant Pest and Disease (Import Control) Regulations (1998)** specify conditions for the entry of plants, plant materials and products. An application for a permit to import a restricted article shall be in form shown in the Regulations and all imports must be accompanied by a phytosanitary certificate. The Regulations also specify criteria and standards for imported planting material and its packing.

**Plant Pest and Disease (Import Control) Order (1998)** prohibits the importation of planting materials used for the propagation of crops specified in its First Schedule. Tissues cultures and seeds of planting material that are certified free of pests by the relevant authority as stated in he phytosanitary certificate maybe imported under a permit issued pursuant to the Regulations. Importation of plants and parts of plants listed in the Second Schedule to this Order is prohibited, except for plants from countries where the Pink Mealybug is reported to exist, which may be imported pursuant to approval of the Chief Agricultural Officer under specified conditions. The importation of plant products listed in the Third Schedule to this Order is subject to prohibitions and restrictions set out in the Schedule.

**Plant Protection Act (2007)** concerns the prevention and control of pests and diseases affecting plants including seed, germplasm and parts of plants. The Act appoints the Chief Agricultural Officer as the public institution having primary responsibility for the administration of this Act. The minister shall, together with the Chief Agricultural Officer, designate an organisation that shall be responsible for the implementation of plant protection agreements, the issue of plant health certificates and various other matters relating to plant protection. The Act also lays down rules applying to export and import of plants.

**Properties devoted to agricultural land**

**Agricultural Holdings (Option to Purchase) Act (1982 consolidated 1995)** requires that a qualified tenant may purchase the freehold of an agricultural holding at a price to be agreed upon between the landlord and tenant. A qualified tenant is a tenant who has been cultivating the holding for a specified number of years. An option to purchase shall be exercised in the form as set out in the Second Schedule to this Act. If the tenant is unable to purchase the freehold, he or she may apply to the High Court.

**Irrigation Act (1967 consolidated 2008)** Act allows the Chief Agricultural Officer, with the approval of the minister responsible for agriculture, to order the carrying out of surveys, investigation or research for purposes of ascertaining whether irrigation is required for specific arable land, or experiment with plans, schemes or equipment for irrigation, or irrigate or cause to be irrigated any land and for that purpose distribute water, control or operate waterworks or any other device.

**Rural Development Commission Act (1996 consolidated 1997)** establishes the Rural Development Commission defines its functions and powers. The Commission shall carry out certain infrastructure works, provide technical assistance to farmers, allocate public land to potential farmers, provide assistance to the cotton industry in rural areas and carry out other functions necessary to effectively carry out the purposes of this Act. The Commission shall appoint a Director of Rural Affairs. The Act also establishes a Rural Development Fund.
BELIZE

The agricultural sector in Belize is strong, being a key contributor to export earnings, employment (approximately 41%), and the country’s overall GDP (35%). The majority of the manufacturing industry is based on inputs from the agricultural sector (sugar, concentrates, feed, chemicals, jellies, juices, packaging, etc.). Over the past few decades, trade in agriculture has continuously grown instead of retraction like other countries in the region. Much of Belize’s agricultural production goes towards domestic consumption. This fact was substantiated by many large industry stakeholders interviewed at the time of the in-country field study. Most exports are from Belize’s traditional agriculture (bananas, citrus, and sugar), however a significant portion of non-traditional exports, such as papayas, black eye peas, honey, chicle, etc. account for the country’s export growth. Not only are current national policies geared towards this, but the country’s legal framework related to agriculture supports the policies Belize implements. For example, the Belize Agricultural Health Authority Act has implemented a myriad of regulations geared towards health, and quality standards in agriculture. Some of these laws are summarized below; however, this report could not contain them all due the volume. Important is the legal and business enabling environment created and sustained by Belize’s credit unions and cooperatives. The country has approximately 15 credit unions and 28 cooperatives within the districts. The institutions and the laws that support them serve to bolster sustainable economic development by providing opportunities in the agricultural sector. There is no doubt that the domestic support for agriculture is granted mainly through tariffs and non-automatic import licensing. The licensing system has increased the price paid by Belizean consumers for various basic foodstuffs, while providing domestic producers little incentive to increase productivity. The authorities believe that non-automatic licensing is required because tariffs alone could not protect the targeted products against foreign competition. At the same time, they consider that the effect on prices and consumers has been reduced by informal imports.

Although export taxes remain specified in some statutes, they are not currently being collected. Export prohibitions and restrictions reflect international commitments and security considerations, except in the case of a few agricultural products, which are subject to non-automatic export licensing. Belize does not have domestic competition policy legislation, but is working towards the adoption of such legislation in the context of CARICOM. This is an important initiative in view of the high levels of concentration in the domestic market, which could deny consumers the benefits of Belize’s trade liberalisation efforts. Price controls are enforced only with respect to a handful of goods, although regulations define administrative prices or mark-ups for several other products.

Legal and business enabling environment

Legal

Industrial agriculture: The laws affecting industrial agriculture in the country centre on the banana, citrus, and sugar. All associations created in the industry require producers to be licensed. For the sugar association, the entity is authorised to negotiate contracts on behalf of farmers and sellers. In addition, there is a special fund that farmers must contribute to which is responsible for price stabilisation and the acquisition of equipment.
for producers. The legislation also requires a cess (levy) on sugar manufactured and exported as well as a fixed quota on sugar exports.

Non-traditional agriculture and fisheries: The legislation on fruits, vegetables, and meat producers deal mainly with the inspection and importation of produce. All fishing vessels (local and foreign) are required to have a licence to operate in the territory.

Customs, taxes and other financial measures: The legislation on customs sets forth duties for fish (except farm shrimp and lobster) and lobster at 5% or 75 cents/pound whichever is lesser, raw sugar at 2%, and mahogany/pine/cedar and other wood at 5%. Other items are determined by the valuation process set forth starting at paragraph 3 of the Customs Act. The country sets customs on CARICOM products based on its CET rates. Export duties include wood, based on measurements, and coconuts set at 8%. The country's regulations provide for duty and tax exemptions or reduced rates upon registering with the Belize Trade and Investment Development Services (BELTRAIDE).

Access to credit and capital: The Development Finance Corporation, which is also funded by Belize's Central Bank, has be re-established recently in the country to provide microfinance assistance to co-ops, associations, and micro/small enterprises. In addition, this group has an innovative programme with the Social Security Board of Belize whereby in addition to its own lending to members of the Sugar Cane Association, the Citrus Association, and the Banana Growers Association. The credit unions support this lending framework. Additionally, the Social Security Board loans to non-traditional agricultural producers provided that they have sufficient collateral.

Business formation: Most business formation legislation centre on cooperative societies.

Quality measures, standards, and protection: Belize has one of the most comprehensive legal frameworks in the region as it relates to pests, plant protection and animals. There is a food and drug act which regulates food standards and labelling as well as several laws governing phytosanitary standards and compliance with HACCP guidelines.

Properties devoted to agricultural land: The research revealed no specific legislation related to agricultural land.

**Business**

As mentioned above, the opportunity for agribusinesses to flourish is apparent through the establishment of the co-ops and credit unions in the country. BELTRAIDE is another entity which supports a strong export platform for the country. BELTRAIDE is promoted as a one-stop-shop where local and foreign entrepreneurs can go to receive assistance in operating businesses.

There is an offshore investment market here as well as a viable tourism industry. However, the incentives and assistance provided to those industries do not appear to be overshadowed by that provided to agriculture. The country also has an International Business Companies Act to encourage international investment. The benefits are further described in Section 3.1.3 of this report. The government has also sought via legislation to develop an offshore banking industry. The Export Processing Zones Act was enacted to boost local and foreign investments in production for export markets with a concentration on manufactured and non-traditional agricultural products. An entity established under this Act receives full import and export duty exemptions, as well as
exemptions from capital gains, income, land, sales, consumption, and dividend taxes. No import or export licensing is required and there are no import restrictions on raw materials for these entities. There is also a 20-year tax holiday. With all of these benefits, this creates a great opportunity for cross-border, local and international investments in agribusiness.

Summary of laws

Industrial agriculture

Banana Industry Act (2000) establishes the Board and sets for its authority, including the authority to promulgate regulations regarding banana production. The Act also establishes an association and sets forth its functions. The Act prohibits planting in certain areas and regulates the issuance of licences.

Citrus (Processing and Production) Act and its Regulations (1967, consolidated 2003) requires licensing of all citrus exporters and importers, whether fresh or processed fruit. The Citrus Control Board and the Citrus Growers Association are established under the Act. The Act also requires the licensing of citrus processors. The powers and duties of the Board are set forth in the Act. A Harvest Committee was also created. The regulations prescribe that whenever there are grounds to suspect harm or injury from any pest, parasite disease or infection to the citrus cultivation in any area, the Association shall ask the Board for its advice. The Board shall advise the Association on the action to be taken to ensure the eradication or the abatement of the pest, parasite disease or infection. The Association shall carry out the advice of the Board on behalf of all citrus growers, and recover from them proportionately the expenses incurred by the Association in that connection.

Sugar Industry Act (2001) establishes the Sugar Industry Control Board and sets forth its function. The Act also establishes the Sugar Cane Production Committee, the Sugar Industry Research and Development Institute, the Sugar Cane Quality Control Authority and the Belize Sugar Cane Farmers Association. The Act addresses sugar imports and exports including manufacturers’ quotas. The Committee is responsible for all aspects of sugar cane production, harvesting and delivery. Producers are required to register with the Cane Farmers’ Register and the Act requires manufacturers only to deal with those registered farmers. The Belize Sugar Cane Farmers Association, established under the Act. Additionally the Act authorises the issuance of licences.

Sugar (Industry Development Fund) (Use) Regulations (2002 consolidated 2003) requires that the Sugar Industry Development Fund be responsible for the following activities: (a) price stabilisation assistance to cane farmers; (b) sugarcane rehabilitation; (c) purchase of specialised equipment for sugar industry projects; (d) establishment and funding of the Sugar Industry Research and Development Institute; (e) performance of any other functions prescribed by the Sugar Industry Act.

Sugar Industry (Control) Regulations (1975 consolidated 2003) requires that only a licensed grower or farmer can deliver sugar cane to a manufacturer in a vehicle registered with the Sugar Industry Control Board.

Sugar Cane Farmers Association Act (1960 consolidated 2000) establishes the functions and powers of the Association to include organisation, financing, etc. The Association shall consist of two divisional associations. A committee is responsible: (a) to
promote, foster and encourage the growing of sugar cane by growers; (b) to extend and promote the welfare of the cane farming industry in Belize; (c) to negotiate on behalf of cane farmers the current price of sugar cane delivered by them to manufacturers; (d) to assist in settling any disputes that may arise between growers and manufacturers; (e) to make representations to the Board on any matter affecting the interest of growers; (f) to deal in fertilisers and agricultural implements and supplies, and to provide growers with agricultural services when the Association considers it in the interest of growers to do so, etc. Every cane farmer over the age of 18 years who applies to and satisfies a divisional committee that either he or his predecessor in title has produced from his land not less than 25 tonnes of cane during the crop year preceding the date of his application shall be registered as a member of the district branch in which his land is situated. The Act creates two types of members, full members and provisional members. The Committee is responsible for issuing licences to all growers desiring to produce and deliver sugar cane to manufacturers, for the purpose of being manufactured into sugar or ethanol or any derivative of sugar cane.

Sugar (Special Funds) Act (1954 consolidated 2000) creates the following special funds: (a) a Sugar Price Stabilisation Fund; (b) a Sugar Rehabilitation Fund; and (c) a Sugar Labour Welfare Fund. Every exporter who either sells or exports sugar is required to an amount levied at 11 dollars per tonne exported or sold to the Financial Secretary who allocates the amounts to the special funds.

Non-traditional agriculture and fisheries

Belize Marketing and Development Corporation Act (1949, consolidated 2003) established the Corporation whose tasks are to: (a) identify local, regional, and international markets for local agricultural products including shrimp and fish, link buyer, sellers, producers and processors of agricultural commodities for both local and export markets and carry out other tasks relative to the internal and external marketing of any article, animal, substance or commodity of every description whatever grown or produced or of which the final process of manufacture has been performed in Belize.

Fertilisers and Feeding Stuffs Act and its Regulations (1979, consolidated 2003) provide for the control of the quality and placing on the market of fertilisers and feeding stuffs. The regulations control ingredients and require that certificates are issued by an analyst via sampling. It also requires full disclosure of specified substances as well as prohibits the use of other substances.

Fisheries Act (1948 amended 1989, consolidated 2000) requires boating and fishing licences, and establishes the authority of fisheries officers and inspections. The Act also prescribes limits related to the Marine reserve. Commercial fishing or exporting is prohibited without a personal licence. The Act also prohibits certain scientific or research operations without a permit. The minister may declare any area within or adjacent to the fishing limits of Belize a marine reserve to afford special protection to the aquatic flora and fauna of such areas and to protect and preserve the natural breeding grounds and habitats of aquatic life and for other purposes.

Fisheries Regulations (1977, consolidated 2003) provide for the licensing and record keeping for the fish exportation. In addition, the regulations prescribe conservation measures for catching of crawfish, bonefish, conch, turtle, coral, the prohibition of the use of certain gear. Schedules contain forms for the entry of export duty, licences, certificates of inspection, and specify processing requirements.
Fisheries (Amendment) Regulations (1997) prohibit shrimp fishing between the 15 April and 14 August of each year.

Fisheries (Amendment) (No. 3) Regulations (1997) create a close season for shrimp fishing between the 15 April and the 22 July of each year. It also prescribes that certain licensing and fishing requirements for crustacean, crawfish, and lobster.

Fisheries (Amendment) Regulations (1999) requires licences for foreign fishing vessels, research permits and marine bioresearch licences, as well as the fees associated with the licences and permits.

Meat and Livestock Act (2000) establishes a commission and association with the authority to handle and create regulations on the meat and livestock production, fund of the commission and association, prices and cess on livestock, penalties and liabilities. The Act also established a producer’s fund. The commission is authorised: (1) to register and regulate cattle breeding societies; (2) to hold or otherwise operate auction sales of livestock; (3) to control the slaughtering of female livestock; (4) to impose minimum weight restrictions on the slaughtering of all livestock; (5) to regulate the movement of cattle and meat within and between districts; (6) to grade livestock and meat and to specify the standards to be applied therefore; (7) to control the sale and exportation and importation of live cattle to be used for breeding or for slaughter; (8) to operate meat packing plants; (9) to advise the minister on all matters concerned with the meat and livestock industry; (10) to be an arbitrator, when requested, in disputes. The association is authorised:(a) to promote understanding and goodwill among its members; (b) to promote the development of the livestock industry; (c) to nominate the association's representatives on the Meat and Livestock Commission to safeguard the interests of members in all matters concerned with the production and marketing of livestock; (d) carry out other functions for the development of the industry.

Plants, Fruits and Vegetables Act and its (Importation) Regulations (1984, consolidated 2003) excludes non-applicable plants, fruits, and vegetables. It requires a permit granted by the Chief Agricultural Officer prior to the importation of such produce. The officer issuing any certificate of introduction or licence under these Regulations may attach thereto such conditions as to disinfections. The Belize Agricultural Health Authority has power to order fumigation, disinfecting of goods and buildings, etc. The Authority can also amend the list of countries from which fruits and vegetables, plant products and planting material may be imported, amend the list of plant species and products which may be imported, and may amend the list of prohibited plant diseases and pests.

Customs, taxes, and other financial measures

Customs and Excise Duties Act (2000) delineates the customs export duties for items, notwithstanding exemptions and determines how the duties can be calculated based on transaction value. The Act sets forth duties for fish (except farm shrimp and lobster) at 5%, lobster at 5% or 75 cents/pound whichever is lesser, raw sugar at 2%, and mahogany/pine/cedar and other wood at 5%. Other items are determined by the valuation process set forth starting at paragraph 3 of the Act. The Act also exempts goods from CARICOM.
Customs Regulation Act (2000) sets forth procedures for entry of ships and goods into the country. The Act also prescribes penalties for illegally importing.

Customs (CARICOM Preference) Regulations (1999) govern the determination if goods shall be treated as having been produced, or manufactured the CARICOM area. They shall be considered as to be CARICOM goods if wholly produced within the CARICOM area, or if they meet conditions as set out in Regulation 3. “Wholly produced” products include vegetables harvested in the CARICOM area, live animals born and raised in the CARICOM area, products obtained live animals within the CARICOM area, or obtained from hunting or fishing in the CARICOM area, marine products taken from the sea by a vessel of a member state, etc.

Fiscal Incentives Act (2000) requires that any entity wishing to enter into an enterprise register with the minister through BELTRAIDE. The costs for registering range from BZ$5,000-7,000 depending on investment, but if the investment amount is less than BZ$250,000, payment is not required. The Act authorises a tax holiday where enterprises are not taxed on profits, income, etc. The Act also provides duty exemption periods for enterprises’ exports, and establishes exemption for imports related to raw and building materials, machinery and equipment.

Fish (Export Duty) Order (1966, consolidated 2003) requires an export duty on all fish taken within the waters of and exported from Belize, at the rates specified for crawfish, shrimp, and other fish whether fresh, salted, smoked or cured. No duty shall be chargeable on the export of fish heads of any fish other than shrimps or crawfish.

Produce Export Duties Act (2000) sets forth export duties for certain products, such as wood (price determined based on measurements) and an 8% export duty on coconuts paid to a special fund.

The customs department in Belize is undergoing reform in order to increase effectiveness by implementing ASYCUDA software, a computerised customs software management system created by UNCTAD. The system takes into account international standards and implements and electronic data system to increase efficiency in customs clearance.

Access to credit and capital

Development Finance Corporation Act (2009) establishes the Corporation and its functions which include providing funding on an economically sustainable and environmentally acceptable basis to individuals or groups of individuals seeking financing for specifically approved purposes and who would otherwise be unable to fund their requirements from other sources on reasonable terms and conditions. The Corporation shall, among other things, finance the development of agriculture, forestry, fishing, industry, agro-industry, tourism and provide funding to micro-finance entities.

Business formation

Cooperative Societies Act (1963 consolidated 2000) establishes the formation, duties, rights and liabilities of co-ops, including dissolution. The Act also prescribes the audit, inspection an inquiry of co-ops. It states that the co-op is a society whose objective is to promote the economic interest of its members. The Registrar of Cooperative Societies has duties and powers concerning registration, audit and inspection, dispute settlement and dissolution.
Quality measures, standards, and protection

Animals (Importation) Control Regulations (2001, consolidated 2003) regulate the importation of animals and animal products, dung, garbage and biological products so as to avoid the introduction of animal diseases into Belize. The Chief Agricultural Officer may in his discretion grant a permit in writing for any animal to be landed elsewhere in Belize subject to such conditions and directions as he may prescribe in such permit. The Regulations provide for quarantine measures.

Belize Agricultural Health Authority Act (1999) addresses the administration of plant health; plant quarantine measures; control of diseased or suspected animals; importation of animals, animal carcasses, animal products, biologicals, feed and litter; fertilisers and feeding stuffs. The Act further provides for the prevention and control of plant and animal diseases in Belize. Quarantine measures are prescribed and importation of plants, animals, animal carcasses, animal products, animal drugs, feed and litter, and use and sale of fertilisers otherwise restricted and regulated.

Belize Agricultural Health Authority (Prevention of Plant and Animal Diseases through Fumigation) Regulations (2000) address preventing the entrance into Belize of plant or animal diseases, and other harmful pests and plagues. The Authority has arranged with the International Regional Organisation for Health in Agriculture (OIRSA) to fumigate all aircraft, vehicles and ships entering Belize from abroad. OIRSA is authorised, for and on behalf of the Government of Belize, to fumigate every aircraft, vehicle or ship listed in the regulations, upon its initial entry into Belize, and again on exit from Belize if its stay in Belize exceeds 12 hours, thereafter after a period of every 12 hours until its departure from Belize.

Belize Agricultural Health Authority (Food Safety) Regulations (2001) requires the monitoring, inspecting, approving, and controlling food safety systems that produce or process food for export from Belize or for consumption within Belize. “Food” is defined as any articles used as food or drink including fish products but excluding water. All food enterprises are required to register with the Authority and to comply with the HACCP guidelines set out in the Schedules to these Regulations. The Regulations also set forth consequences of non-compliance (i.e. licence revocation). The Central Investigation Laboratory is designated as the food-testing laboratory for purposes of these Regulations. The Authority shall issue in respect of fish and fish products to be exported from Belize a sanitary certificate as set out in the Fourth Schedule.

Belize Agricultural Health Authority (Fish and Fisheries Products Inspection) Regulations (2001) control the placing on the market in Belize and the importation into Belize and exportation from Belize of fish and fisheries products for commercial purposes. The regulations control labelling, quality requirements, and code markings. They require fish import permits, record maintenance, and numbered tags for all containers of fish and fisheries products. Frequent reference is made to implementation of HACCP programmes. Regulation also requires the issuance of fish export licences.

Belize Agricultural Health Authority (Quarantine Inspection and Certification Fees) Regulations (2001, consolidated 2003) prescribe fees for quarantine inspection of imported cargo and for the issuance of a phytosanitary certificate. Every container or vessel, carrying any commodity or product listed in the Schedule, which needs quarantine
inspection at a private warehouse or storage facility and for which Customs entry forms have been stamped “visual inspection required”, shall not be allowed to leave any air or sea port unless accompanied by a container application from the Authority and a Quarantine Inspector. The Regulations also define offences in relation to importation of plants and animals such as making false declarations, illegal possession of any plant, plant product, plant by-product, animal, animal product, animal by-product, carcass, feed, litter, dung, biological agents or similar things, etc.

Belize Agricultural Health Authority (Service Fees) Regulations (2004) require plants, animals and their products or by-products including food (“Commodities”) that are either exported from or imported in Belize to undergo procedures of inspection, sampling and analysis as prescribed by the Belize Agricultural Health Authority Act and these Regulations. Inspections include inspection of materials to be exported for purposes of issuing a Sanitary or Phytosanitary (SPS) Certificate. The Regulations also prescribe fees for the various kinds of inspection, sampling and analysing services.

Belize Agricultural Health Authority (Inspection in a Foreign Country) Regulations (2004) require evaluation for compliance in the exporting country to ensure conformity with Belize’s sanitary and phytosanitary measures. These Measures are made in accordance with the SPS Agreement Measures of the World Trade Organisation. The evaluation procedure of the Belize Agricultural Health Authority is set out in the Second Schedule to these Regulations.

Food and Drugs Act (1953, consolidated 2000) regulates food and drug quality, i.e. the composition of food and drugs. The Regulations also have specifications on food labelling. The minister is also granted authority to make an other regulations related to the observance of sanitary and cleanly conditions and practices in connection with: (a) the sale of food for human consumption, or (b) the importation, exportation, preparation, transport, storage, packaging, wrapping, exposure for sale, service or delivery of food intended for sale or sold for human consumption, or otherwise for the protection of the public health in connection with food matters.

Quarantine Act (1947, consolidated 2000) establishes a Quarantine Authority. The person from time to time holding the office of Director of Health Services shall be the Quarantine Authority and the Public Services Commission may appoint health officers. The minister may make regulations, as respects the whole or any part of Belize, including the ports and coastal waters thereof, for the control of infection.

Slaughter of Animals Act (1968, consolidated 2000) requires all animals slaughtered for export to be slaughtered in a slaughterhouse licensed under the Food and Drugs Act. “Animal” here means the male, female or young of goat, swine, cattle or sheep. No animal shall be slaughtered or stunned in a slaughterhouse or by any person who is not the holder of a licence granted by the minister: The licences are required to specify: (a) the kind of animals which may be slaughtered or stunned by the holder of the licence; and (b) the types of instrument which may be used by him for slaughtering or stunning, and may be granted subject to a condition prohibiting the slaughtering of any animal in pursuance of the licence except under the supervision of a person being the holder of a licence in force under this section which is not subject to a like condition. Regulations making powers of the minister are specified.

Properties devoted to agricultural land
No measures specifically addressing agricultural land.

3. Summaries for the larger CARICOM countries: Guyana, Jamaica and Trinidad and Tobago

Legal and business enabling environment

**GUYANA**

Similar to other CARICOM countries, legislation related to industrial agriculture is extensive. In Guyana, these laws govern the sugar and rice industries and cover every aspect of the business from establishing funds from the proceeds of levies to benefit farmers, creating committees to govern and manage the industry, determining the grades and standards of the product, control of production and exports, to the public sector management of farmers via licences and registration. Non-traditional agriculture sector in Guyana ranges from timber wood production, fruit and vegetables, and livestock to name a few. Legislation found under this sector covered the licensing, registration and inspection of livestock, poultry, fish and timber but did not cover other items like fruits and vegetables. These rules also prohibited the export and importation of livestock, poultry, and fish without satisfying quality measures prescribed by the rules, as well as quarantine measures. Quality measures related to the registration and regulation of pesticides are also in force. As for financial measures, most agricultural products and inputs are subject to a VAT rate of 0-1% as opposed to the standard rate. Rules on customs duties incorporate rules on CET rates and other exemptions that impact the agricultural sector. The only access to credit measure found in the legislation related to loans granted to finance livestock production.

However, Guyana has a small business development Act which provides both technical and financial assistance and incentives. Notwithstanding the standard corporate formation rules, the government enacted rules related to the formation of cooperative societies, which include those formed for agricultural purposes. It is also important to note that Guyana was one of the only countries that had laws related to praedial larceny, which prohibits the taking of produce or trespassing onto agricultural lands. Whether or not these rules are in fact enforced is uncertain. The elements that appear to be lacking in the legislative infrastructure are: 1) more robust measures addressing standards and SPS; 2) more rules on access to capital and credit; 3) land use issues as it relates to properties devoted to agriculture, and 4) rules related to the country’s diverse non-traditional agriculture sector. These rules would greatly improve the enabling environment for agribusiness in the country by providing support, incentives, and guidelines to farmers and other agribusiness entities.

**JAMAICA**

As for the enabling environment in Jamaica, there are several policies in place that support domestic initiatives. The government has created approved farmer status for farmers engaged in the production of certain crops, e.g. egg hatcheries. Under this status, farmers are entitled to relief from income tax and customs duties for up to ten years, after which the status may be renewed.
The Factory Construction Law assists companies that construct factories and lease or sell them to manufacturers under the Export Industry Encouragement Act. It grants relief from import duties and income tax. The country also has an Exchange Control Act to promote foreign direct investment by facilitating the free movement of capital to other countries. Also, businesses who register with the Ministry of Industry, Commerce and Technology can take capital expenditure deductions for the costs of new machinery, etc. Beyond fiscal incentives, there are several laws that establish access to credit and capital for farmers and those in the sector.

As for industrial agriculture, there are many laws related to the production of bananas, coffee, cocoa, coconut, rice, and sugar. Like Guyana, these rules cover every aspect of the business from establishing funds from the proceeds of levies to benefit farmers, creating boards and committees to govern and manage the industry, determining the grades, quality, and standards of the product, control of production and exports, to the public sector management of farmers via licences and registration. It is also worth noting, that the country has enacted insurance legislation covering coconut production. This is significant because it is one of the only pieces of insurance legislation in the region addressing agriculture specifically. As for non-traditional agriculture, permits are required for the cultivation and transport of all fruits and vegetables. All fishing vessels (local and foreign) are required to have a licence to operate in the territory. Other regulations addressed the quality of exports for certain commodities. Legislation on customs and taxes detail anti-dumping and countervailing duties, consumption tax rates (which are zero-rated for agricultural products), and also incorporate CET rates as well as exemptions set forth in specific statutes. There are also extensive measures that address the quality and standards of food for domestic consumption and exports, regulating matters from processed food, animal and plant diseases, to pesticide requirements. Notwithstanding the traditional corporate formation rules, Jamaica has specific rules which address the protection of agricultural cooperatives, through the Cooperative Marketing Association. Also, Jamaica is one of the only countries studied (other than Trinidad & Tobago) with comprehensive laws related to the production and possession of agricultural land. These significant laws protect the rights of parties who contract to cultivate land, protect against praedial larcency, and incorporate farm lands into the country’s overall land development scheme.

**TRINIDAD AND TOBAGO**

One unique aspect of Trinidad and Tobago’s enabling environment is the country’s ability to issue bonds for the purpose of economic development pursuant to the Development Loans Act. This tool is especially important in building infrastructure to support any particular industry, and it was significant that this was one of only such legislation supporting this mechanism. As for industrial agriculture, similar to the countries mentioned above, the legislation covering major commodities like sugar, coffee, and cocoa, governs every aspect of the business. The same can not be said for non-traditional agriculture, which is similar to other countries in the region. These rules address the export and importation of fruits and vegetables, livestock, poultry, and fish/aquaculture. All fishing vessels (local and foreign) are required to have a licence to operate in the territory. Quality measures related to the registration and regulation of pesticides are also in force. As for financial measures, most agricultural products and inputs are subject to a zero-rated VAT. The only access to credit measure found in the legislation was through an Agricultural Development Bank. Notwithstanding the standard
corporate formation rules, the government enacted rules related to the formation of cooperative societies, which include those formed for agricultural purposes. Also, like Jamaica, the country has comprehensive laws related to the production and possession of agricultural land. These significant laws protect the rights of parties who contract to cultivate land, protect against praedial larcency, and incorporate farm lands into the country’s overall land development scheme.

Summary of laws

GUYANA

Industrial agriculture

Cane Farmers Special Funds Act (1974, consolidated 1998) provides for the establishment of funds for the benefit of sugar cane farmers: The Cane Farmers Rehabilitation Fund and the Cane Farmers Price Stabilisation Fund. A Committee is charged with management of the funds and is required to report on transactions and accounts of the Funds to the minister.

Guyana Rice Development Board Act (1994, consolidated 1998) establishes the Board and its functions which are to develop the rice industry in Guyana, to promote export of rice, to enhance research on rice, to establish facilities for that purpose, and to extend results of research to farmers for their benefit. The Board is also responsible for the grading of rice. The Board may determine different classifications of grades of rice to be purchased, exported or sold on the domestic market. The Act gives a detailed definition of functions of the Board in respect of exporting rice.

National Cane Farming Committee Act (1965, consolidated 1998) establishes the Committee to devise programmes and schemes for the promotion and development of cultivation of sugar cane. The Committee is also authorised to advise the minister on matters pertaining to the maintenance and the development of the cane farming industry and carry out other functions. Members of the Committee are appointed by the minister. A District Association is created to make recommendations and representations to the Committee on behalf of cane farmers on matters relating cultivation. The Committee is required to keep a register of districts and farmers in each district and of all contracts entered into between a farmer and manufacturer for the cultivation, sale and processing of sugar cane.

Rice Factories Act (2002) makes provision for the public control on the manufacture of rice and for this purpose requires rice manufacturers to obtain a licence from the Guyana Rice Development Board. Establishment of a rice factory requires a permit from the Board.

Sugar Industry Special Funds (Special Provisions) Act (1998) authorises a Committee to control and administer the funds not to exceed a certain amount for the purpose of making ex-gratia payments to pensions to labour workers in the sugar industry, who at the time of retirement were not eligible to receive old age pensions under the National Insurance and Social Security (benefit) Regulations.
Sugar Industry Special Funds Act (1947, consolidated 1998) provides that the Sugar Industry Price Stabilisation Fund, the Sugar Industry Price Rehabilitation Fund and the Sugar Industry Labour Welfare Fund are established by the Secretary of Treasury who shall act as trustee of those funds. Levies shall be collected on the export of sugar for the benefit of the funds. All funds are to be managed by a managed by Committees. The Committees may make Regulations concerning the basis and disbursements of the funds under their control.

Sugar Levy Act (1974, consolidated 1998) provides that there shall be sugar levy on all types of sugar manufactured in and exported from Guyana, the amount of which shall be calculated according to specifications set out in the rules. Every exporter is required to submit to the comptroller a provisional return in the prescribed form estimating the amount of sugar levy payable. Within three months a final return shall be submitted to the comptroller. The comptroller may assess the amount to be paid and in case of disagreement shall notify the exporter of the outstanding balance to be paid. The exporter may lodge a notice of objection with the comptroller. Regulation-making powers of the minister are also set forth in this Act.

Non-traditional agriculture

Cattle Stealing Prevention Act (1953, consolidated 1998) introduces measures to prevent the stealing of cattle. The Act makes provision for, among other things: (a) revision of existing brands and the renewed registration of brands; (b) the compulsory branding of animals; (c) control of brands; (d) control of slaughter of animals; (e) the keeping of records on animals; and (f) control of movement and trespass of animals. The Act also defines various offences and grants powers to the minister to declare emergency areas and to make Regulations.

Guyana Timber Export Act (1973 consolidated 1998) establishes a Guyana Timber Export Commission to regulate the export of timber. The Commission is required to register producers of timber for export if the producer has obtained approval for registration of the minister. The Commission shall also recommend producer programmes for maintaining, controlling and regulating supplies of timber so as to regulate timber exportation in the best possible manner. No person shall export timber without a written permission obtained from the Commission in accordance with Section 5. The Commission may appoint agents and may enter into agreements with registered producers for the purpose of facilitating the export of timber. Remaining provisions of the Act deal with funds of the Commission, record keeping and auditing, investments to be made by the Commission, annual reports, etc.

Livestock Improvement Act (1949, consolidated 1998) provides for the registration and inspection of bulls, stallions, jacks, boars, ram or buck in breeding age. The Register shall be kept by the Chief Agricultural Officer. Animals must have a certificate and be registered in the Register with distinctive number or mark for each animal. The registration and inspection of the animal in order to obtain certification shall be carried out on request of the owner of the animal. The Chief Agricultural Officer may cancel a certification and eradicate an animal from the register “for sufficient cause”. Registered animals may be inspected by the Chief Agricultural Officer or inspectors designated by the Chief Agricultural Officer under this Act. Other provisions of the Act deal with changes in the Register and prescribe offences.
Poultry and Poultry Eggs (Conditions of Importation) (1965) defines poultry to include any live domestic fowl, turkey, goose, duck, guinea fowl, pheasant or pigeon. The regulation prohibits the importation of poultry or poultry eggs except from certain areas. Such import shall be accompanied by a certificate of health signed by the proper authority of the country of origin to the effect that the poultry eggs emanate from stock free from specified diseases. No person shall import containers used for poultry unless such container is new and clean.

Timber Marketing Act (1974, consolidated 1998) grants powers to the Conservator of Forests, acting on behalf of the Guyana Forestry Commission, to authorise a person to perform the functions of a forest officer or timber marking inspector for purposes of this Act. No person shall sell any timber advertised as “graded timber” unless such timber has been graded according to grading rules approved by the Conservator of Forests or sell timber making claims as to moisture content or preservative treatment of timber unless the timber conforms specified standards. Brands to be affixed to timber that has undergone preservative treatment shall be registered with the Conservator of Forests. No person shall export timber except under an export certificate as prescribed and issued by a forest officer of or above the rank of Assistant Conservator of Forest or a timber marketing officer. The Conservator of Forests may assign trade names to timber of any species in accordance with provisions of this Act. Powers of the Conservator of Forests, a forest officer or a timber marketing inspector under this Act are set forth in the legislation.

Customs, taxes, and other financial measures

Customs Act (2004, amended 2008) addresses customs duties, exemptions of import and export duties, CARICOM exemptions environmental tax on imported beverages, tariffs (both general and preferential), warehousing, smuggling, penalties, and legal proceedings.

Excise Tax Act (2005, amended 2008) addresses the tax rate of imported goods based on a calculation which takes into account ad valorem, VAT, and other charges.

Value-added Tax Act (2005) addresses taxable supplies of goods & services and activities, tax on imports. The standard rate is 16% but many agricultural products and inputs are charged at a reduced rate 0-1%.

Access to credit and capital

Livestock (Loans for Development) Act (1971, consolidated 1998) concerns loans to finance the livestock production. The Act defines licensed banking entities or lenders in the country. The farmer may create charges in favour of a lender on the interest of the farmer in the land that he or she owns or leases together with crops growing on it, livestock, machinery or any other movable property belonging to the framer as security for the repayment of the loan. The charge may be fixed, floating or both fixed and floating. Other provisions of this Act seek to create other guarantees to the lender such as restrictions on the use of loans, restrictions on the disposal of livestock, prohibition of offering fraudulent security and the right of the lender to inspect the property of the farmer. Loans shall be used only for purposes as shall be mentioned in the charge. Farmers may, in the ordinary course of business, sell livestock mentioned in the charge. The lender may inspect the property charged.

Business formation
Cooperative Societies Act (1948, consolidated 1998) concerns the constitution, registration, operation, etc. of co-ops. A commissioner of cooperative development and such other officers as may be required to assist the commissioner are authorised under the Act. Other provisions in the Act concern the disposal of (agricultural) produce of its members by a society. A co-op may prescribe in its rules that the whole or part of the produce shall be disposed of through the cooperative society and may prescribe a penalty for non-compliance by its members with such rule. Settlement of disputes within societies, among members, and between registered societies is supervised by the commissioner.

Small Business Act (2004) establishes a Small Business Council, Bureau, and Development Fund to benefit companies employing a maximum of 25 persons, a maximum of GY$60 million gross revenues and a maximum of GY$20 million total assets. Those companies must seek approval under to be a small business entity from the Council. The Council and the Bureau are responsible for promoting development of small business, coordinate small business programmes with government and other agency funding, provide an annual report on small businesses, and provide recommendations of fiscal incentives for small businesses. The Fund is responsible for providing support and access to financing for small businesses, technical assistance on productivity and competitiveness, and provide for expenses of the Council. The Fund shall consist of grants, government funding, and monies from investments.

Quality measures, standards and protection

Animals (movement) and Disease Prevention Act (2003) regulates the importation and exportation of animals, including fish and other aquatic organisms, and provides for other measures for purposes of preventing the spreading of diseases affecting animals and provides for the welfare of animals.

Export certificates are required as well as the inspection of animals before and after slaughter. Other provisions cover the risk assessment studies, inspecting and certifying the health of animals, genetic materials, livestock feeds, animal products and other items to be imported into Guyana, establishing and maintaining laboratory testing facilities, and emergency quarantine actions. Animals or animal parts are prohibited from being imported unless originating in prescribed countries and accompanied by a certificate to that effect and in imported in accordance with a permit issued by the veterinary authority.

Pesticides and Toxic Chemicals Control Act (2002) establishes a Board which consists of government officials and representatives of various organisations appointed by the minister. The Board shall register pesticides and toxic chemicals, advise the minister on matters relevant to the making of Regulations under this Act and to advise on the monitoring and implementation of such Regulations. The minister shall appoint the Registrar of Pesticides and Toxic Chemicals, who acts as Secretary of the Board. Other provisions regulate the manufacturing, sale, advertising or importing of pesticides and toxic chemicals. Products shall be registered and the manufacturer, seller or importer shall obtain a licence from the Board.

Slaughter of Cattle (Control) Act (1974, consolidated 1998) regulates the slaughter of bulls, oxen, steers, cows, heifer or calves, which is prohibited without permission from the veterinary officer.
Animals Diseases Act (1936, consolidated 1998) concerns the prevention of diseases affecting animals. The Chief Agricultural Officer shall keep a register a veterinary surgeons register consisting of veterinary surgeons admitted to the register after application. Veterinary surgeons shall notify the Chief Agricultural Officer of diseases among animals which they encounter during their practice. Other provisions concern landing of animals and inspection, disposal of infected animals, straying of stock, special provisions for anthrax, powers of enforcement, offences, and regulation-making powers of the minister.

Properties devoted to agricultural land

Produce Protection Act (1978, consolidated 1998) introduces various measures and prohibitions in order to prevent and fight illegal appropriation of commodities as specified by the minister. Powers to stop suspected vehicles, examine produce, etc. are given to police officers. Proof of ownership of produce may be required if ownership is doubtful. Persons trespassing land on which produce is grown shall explain their presence in a satisfactory manner, otherwise they will be charged with trespassing land for purposes of unlawfully obtaining produce.

JAMAICA

Industrial agriculture

Agricultural Marketing Corporation Act (1960 consolidated 1981) establishes the Agricultural Marketing Corporation as a corporate body with functions, powers and rules centred on maintaining an efficient marketing system for agricultural produce by securing the most favourable arrangements for the purchase, handling, sale and exportation of agricultural produce. The Corporation may (amongst other things) buy and sell agricultural produce; and provide for the collection, transportation, storage, grading, packing and processing of agricultural produce. “Agricultural produce” includes livestock, poultry, fish and the produce of any plant or animal.

Agricultural Marketing Act and its Regulations (1945, consolidated 1976) implement provisions of the Agricultural Marketing Act with respect to registration of producers of specified agricultural produce. The Registrar shall keep a register of producers. The Regulations also provide for the cancellation of registration and prescribe offences.

Agricultural Produce Act (1926, amended 1995, consolidated 2004) requires any person carrying on a business growing or rearing agricultural produce to be registered with the Rural Agricultural Development Authority and governs the issuance of annual licences to any buyer or seller, producer dealer, or carrier of agricultural produce. The Act also addresses the authorisation of the sale of certain cured produce, the record keeping of transactions related to buying and selling produce, the licensing of carrier vehicles, as well as the minister’s authority to promulgate authority related to this Act.

Agricultural Produce (Trade Marks) Regulations (1927, consolidated 1991) require the registration of trade marks for specified agricultural products, including coffee and cocoa. The Regulations also prohibit the exportation of such products that are not marked properly.
Agricultural Produce (Coffee) Regulations (1941, consolidated 1976) prohibit the sale or purchase of cherry coffee containing entirely green berries; coffee containing black beans, stones, trash or other foreign matter; coffee dried in the whole shell or double husk; and coffee which has been dried on the ground.

Agricultural Produce (Cocoa) Regulations (1950, consigned 1976) prohibit the sale or purchase of cocoa containing stones, trash or other foreign matter or cocoa which has been dried on the ground. "Cocoa" means cacao beans whether in the pod or pulp or separated and whether cured or uncured, ripe or unripe, wet or dry, raw or processed, fermented or unfermented.

Agricultural Produce (Notice of Intention to Export) Regulations (1953, consolidated 1976) require every person intending to export any agricultural produce to give prior notice in writing of this to the Inspector of Agricultural Produce for the area from which the agricultural produce is to be exported. The notice shall specify the quantities, marks, location and destination of the agricultural produce.

Agricultural Produce (Banana) Regulations (1969, consolidated 1976) provide rules for the handling, storage, transportation and packing of bananas and standards for the handling and quality of bananas intended for exportation. They prohibit various actions in respect of bananas so as to protect them from damage.

Banana Board Act (1953, amended 1986) establishes the Banana Board and defines its functions and powers. Members are appointed by the minister. The Board's functions are to: (a) promote the interests and efficiency of the banana industry; (b) secure the most favourable arrangements for trade in bananas and to carry out trade in bananas; and (c) institute, conduct, finance, assist, and supervise research activities, experiments and operations in relation with the improvement of banana cultivation and the prevention and eradication of diseases affecting banana plants.

Banana Insurance Act (1953, amended 1976) provides for compulsory insurance for banana growers against damage caused to banana cultivations by windstorm, and for financial aid for such insurance, to be granted by the Banana Board in accordance with provisions of this Act. Every banana grower is statutorily insured under this Act in respect of assessed acreage of banana cultivation against loss incurred through hurricanes, tornados, cyclones or other atmospheric disturbances. Banana growers are also permitted to contract insurance for replanted or new cultivations and receive financial aid for such insurance. The Act sets out the conditions for banana growers to qualify for financial aid. The Act requires a cess upon the insurance weight of exported bananas or bananas purchased for export, whether subsequently exported or not.

Cocoa Industry Board Act (1957, consolidated 1993) establishes the Board and defines its functions, powers, which include: (a) promote the interests and efficiency of the cocoa industry; (b) secure the most favourable arrangements for the purchase, handling, marketing, sale, importation and exportation of cocoa; and (c) advise the minister. The members of the Board shall be appointed by the minister.

Coconut Industry Control (Cess) Regulations (1999) imposes a cess on the importation of coconut, which shall be paid to the Coconut Industry Control Board. A Customs release shall be issued and presented subsequently for clearance of the products. If the coconut product is produced in Jamaica, a consumer or distributor of the
product shall pay cess to the manufacturer who shall then pay cess to the Board. The manufacturer shall keep records as may be prescribed by the Board.

**Coconut Industry Aid Act (2004)** introduces measures to control the importation of edible oils and the exportation of coconut oil. The Act requires a licence for the importation of products.

**Coconut Industry Control Act (1945, consolidated 2004)** establishes the Coconut Industry Board as a body corporate. It shall consist of nine members who shall be appointed and elected. The Board may: (a) buy, sell and trade in coconuts, and coconut products, and such other commodities as the Board with the approval of the minister may, from time to time, determine; export or dispose of coconuts, and coconut products; (b) process or manufacture coconut products; (c) apply for the allotment of, purchase, or hold, shares in any company having as one or other of its objects the sale of coconuts or the processing or manufacturing of coconut products; (d) subject to the approval of the minister, apply for the allotment of, purchase, or hold, shares in any company, irrespective of the objects of such company; etc. The Board shall, upon being required so by a local manufacturer, sell copra to such manufacturer at the prescribed prices in such proportions and quantities as may from time to time be prescribed.

**Cocoa Industry Regulations (1957, amended 1976)** implement provisions of the Cocoa Industry Act and assign privileges in cocoa trade to the Cocoa Industry Board. The Regulations furthermore require cocoa traders to keep records on cocoa trade and provide for control of the trade in cocoa by the Board. Operation of cocoa processing plants and trade in wet cocoa requires a licence. The Regulations also make provision with respect to appeals.

**Coconut (Regulation of Sales) Regulations (1958, consolidated 1991)** make provision for the control of transactions in controlled coconut products. The Regulations provide rules relative to the purchase of controlled products and impose certain conditions of (compulsory) sale of controlled products on sellers.

**Coconut Control Board (Additional Powers) Order (1957, consolidated 1991)** made under the Coconut Industry Control Act, prescribes that, in addition to the powers and duties expressly conferred upon the Coconut Control Board by the Act, the Board is empowered to make Regulations regulating the distribution, purchase or sale of coconut or coconut products.

**Coconut Windstorm Insurance Regulations (1949 consolidated 2005) and the Coconut Insurance Act (1989)** concern the indemnity of damage under the Coconut Insurance Act caused by windstorm to coconut plantations. The Regulations specify criteria for payment of indemnity and for the contracting of insurance with the Coconut Industry Board. The Regulations also prescribe the criteria for the establishment of the amount of indemnity to be paid and procedures for the assessment of damage. “Windstorm” means any hurricane, tornado, cyclone, whirlwind, gale or atmospheric disturbance whether similar to the foregoing or not. For the purposes of these Regulations, the Coconut Board shall establish a Coconut Windstorm Insurance Fund.

**Coffee Industry Regulation Act (1948, amended 1999)** establishes the Coffee Industry Board as a body corporate and defines its functions, powers, which are, among other things: (a) promote the development of the coffee industry; (b) establish and maintain nurseries and coffee plantations; and (c) advise the minister.
Coffee Industry Regulations (1953, amended/consigned 1999) implement provisions of the Coffee Industry Regulation Act with respect to: inspections of coffee cultivations; keeping of records by coffee dealers and the owner, operator, occupier or manager of coffee works; the requirement to obtain a licence from the Coffee Industry Board for the operation of coffee works; trading in coffee; the prohibition to supply entirely green coffee to the market; appeals and offences.

Rice Industry Board Act (1956, consolidated 1973) establishes the Board and defines its functions and powers, which are, amongst other things: provide for the registration of rice growers and rice mills; establish and operate nurseries, research stations, rice mills and other works in relation with the rice industry; and provide for the grading of rice.

Sugar Industry Control Act (1937 amended/consolidated 1994) establishes the Sugar Industry Authority to control the industry and trade in sugar by, amongst other things setting export quotas (approved by the minister). The Authority is also authorised to carry out research and planning, make arrangements in respect of the marketing of sugar and molasses, issue licences for the importation of sugar, register cane farmers and issue licences in respect to quotas of cane farmers. The Act also provides for the resolution of disputes by the Authority.

Sugar Industry Control Regulations (1943, consolidated 1976) implement the Act by, among other things: prescribing forms; providing for the inspection of cultivations; prescribing the method of testing of quality of sugar canes in the case of a dispute; prescribing the method of the weighing of canes; and by providing rules for appeals.

Cane Farmers’ Licence Order (1939, consolidated 1976) under the Sugar Industry Control Act, stipulates that no cane farmer’s canes shall be delivered at a factory except under a licence.

Sugar Cane Farmers (Incorporation and Cess) Act (1941, amended 1984) provides for the incorporation of the All-Island Jamaica Cane Farmers Association, defines its powers, management (by Committee), and supervision (by Government). The Act also grants powers to the minister to impose a cess on the canes delivered to a sugar manufacturer. The Association shall represent cane farmers in dealings with the government and sugar factories, shall promote and foster the growing of sugar cane, buy materials necessary for the cultivation of cane by its members and carry out other functions assigned to it under this Act.

Sugar Cane (Minimum Price) Order (1943, consolidated 1976) specifies the formula of calculation of the minimum price to be paid by manufacturers to cane farmers for one tonne of sugar cane, delivered by the cane farmer to the factory and provides for interventions of the Sugar Industry Authority for ascertaining the quantity of sugar cane delivered.

Sugar Industry (Quota and Export) (license conditions) Regulations, (1974, consigned 1976) incorporate compulsory terms and conditions, which include the delivery of canes to manufacturers, in all quota and export licences.

The Sugar Reserve Funds Act (1941, amended 2003, consolidated 2004) creates the Sugar Price Stabilisation Fund, a Sugar Industry Capital Rehabilitation Fund, a Sugar Industry Labour Welfare Fund and a Sugar Workers Pensions Fund. The pensions fund...
creates a pension and superannuation funds for workers (including casual workers) in the industry. The Act also requires sugar exporters to pay part of their proceeds to the Government. The Act contains a provision that requires exporters to pay a “statutory deduction” on sugar covered by an insurance policy; however, the Act does not go into great detail regarding this policy.

Non-traditional agriculture and fisheries

See the following legislation under the Industrial Agriculture Section:

Agricultural Marketing Corporation Act (1960 consolidated 1981) and its Regulations
Agricultural Marketing Act (1945, consolidated 1976) and its Regulations
Agricultural Produce (Trade Marks) Regulations (1927, consigned1991)

Agricultural Produce (Tomatoes) Regulations (1948, consolidated 1976) provide rules for the picking, handling, storage, transportation and packing of tomatoes and standards for the handling and quality of tomatoes intended for exportation. The Regulations prohibit the exportation of tomatoes marked as unmarketable fruit within the meaning of the Act and prescribes quality grades for export tomatoes.

Citrus Fruit (Protection) Regulations (1948, consolidated 1976) provide rules for the picking, handling, storage, transportation and packing of citrus fruit and standards for the handling and quality of citrus fruit intended for exportation.

The Regulations prohibit the exportation of citrus fruit marked as unmarketable fruit within the meaning of the Act and prescribe quality grades for export citrus fruit. See Agricultural Produce (Notice of Intention to Export) Regulations (1953, consolidated 1976).

Agricultural Produce (Vegetables, Fruit and Ground Provisions) (Export) Regulations (1969, consigned1976) require a permit to be obtained from an Inspector of Produce for the gathering, collecting or transporting of fruit and vegetables specified in the Schedule to these Regulations (“prescribed produce”). The Regulations also prohibit the gathering, collecting or transporting any prescribed produce intended for export except in such manner and in such containers as may be approved by an Inspector of Produce.

Agricultural Produce (Ginger) Regulations (1979 consolidated 1991) prohibit the export of green ginger unless the exporter has obtained a certificate or permit for such export from the Chief Inspector of produce. The Chief Inspector of Produce may at any time determine the date and the total quantity of green ginger that may be exported by any person.

Agricultural Produce (Pimento) Regulations (1988 consolidated 1991) prohibit the export or sale of green pimentos and berries not properly cured, pimento containing sticks, stones, ripes or trash, nor pimento dried on the ground. Regulations only permit exporters approved and registered by the minister to export pimento and only in
accordance with rules set out in these Regulations. The Regulations also provide for the approval of spice manufacturers and the inspection of produce intended for exportation.

**Citrus Plant (Certification) Regulations (1999, consolidated 2001)** make provision for the registration and certification of citrus cultivation. Regulations establish the Jamaica Citrus Protection Agency responsible for the implementation of a mandatory citrus certification programme as set out in the Regulations. Persons who intend to cultivate or sell citrus trees shall apply to the Agency for registration of the nursery. If approved the Agency issues a certificate of registration. Owners of existing trees shall apply for certification of their trees as seed source trees under regulation. Inspection of the trees shall be carried out by the Agency and if satisfactory a certificate shall be issued, together with a numbered tag. A certified tree may only be produced by a nursery registered. The Regulations also set forth fees for certification, etc.

**Fertilisers and Feeding Stuffs Act (1942, consolidated 1973)** defines civil and criminal liability of persons who place such items on the market; provides for sampling and analysis of items placed on the market; (c) sets forth rules relative to their ingredients, naming, marking and packing; (d) prescribes offences; and defines regulation-making powers of the minister. The Act requires persons who sell prescribed feeding stuffs and fertilisers to issue a statutory statement declaring prescribed particulars.

**Fertilisers and Feeding Stuffs Regulations (1945, consolidated 1976)** implement provisions of the Fertilisers and Feeding Stuffs Act in relation with labelling of fertilisers and feeding stuffs, method and procedure of sampling, limits of variation and the form of certificate of analysis for fertilisers and feeding stuffs.

**Fishing Industry Act (1975 consolidated 1993)** requires licences to fish unless exempted by the exemption order. The Act also addresses licensing for fishing boats but does not specifically discuss licensing foreign boats of vessels. Other sections prohibit unlawfully removing or damaging boats, fish-pots, nets, gear or other fishing equipment belonging to some other person.

**Fishing Industry (Exemption) Order (1976, consolidated/amended 1977)** lists persons exempt from Section 3(1) of the Fishing Industry Act which prohibits fishing with specified fishing methods without valid licence issued by the Licensing Authority. Therefore, these persons may fish without such a licence. These persons include those under 16 years of age if accompanied with a licence holder, visiting consultant, foreign or international agency employee on attachment to the Ministry of Agriculture’s Division of Fisheries.

**Fishing Industry Regulations (1976 consolidated 1983)** contains several regulations including but not limited to the issuance of fishing licences, registration of fishermen and vessels, marking of vessels, catching of lobster, use of certain fishing gear, and other enforcement measures and penalties.

**Fishing Industry (Conservation of Conch (Genus Strombus)) Regulations (2000 consolidated 2002)** sets the maximum of weight of 50% cleaned conch, which may be landed during the period outside of the close season for conch shall not exceed the national Total Allowable Catch, as to be determined by the minister 30 days before the end of the close season. Licensed fishermen shall not exceed individual conch quotas as determined by the minister at least 30 days before the end of the close season. Other regulations provide for inspection of storage and commercial establishments by fisheries
inspectors. The Regulations prohibit fishing, collecting, or offering for sale immature conch. The schedules set forth log books for processing plants and the conversion factors for processing, amongst other things.

**Fishing Industry (Declaration of Close Season)(Lobster) Order (1987)** declares a close season for lobsters from 1 April through to 20 June of each year.

**Fishing Industry (Amendment of Schedule) Order (2000)** amends Section 3 of the Act by adding other methods of fishing including diving with the use of underwater breathing apparatus including Hookah and SCUBA gear, and Hawaiian sling all provided that the user has a valid licence.

**Jamaica Dairy Development Board Act (2009)** establishes and defines the functions of the Board. The Act also requires the licensing of production of and trade in dairy products. “Dairy products” are products wholly or mainly made of milk. As a corporate body, the Board is mandated with (amongst other things) regulating the production, processing, packing etc. of and trade in dairy products, and supervise and arbitrate contracts in the sector and advise the minister on matters of policy. In addition, the Act provides for issuance of licences for producers, dealers, and vendors. The appeals process, inspections, and offences are also described as well as the regulation-making powers of the Board.

**See Meat and Meat Products and Meat By-products (Inspection and Export) (1999 revised 2001)**

**Plants (Importation) Control Regulations (1997, consolidated 2000)** requires plants, seeds, cuttings, and slips to be imported only when a permit is granted by the Chief Plant Quarantine Officer. Landing of plants, seeds, cuttings, or slips requires a written permission of the Officer. A person who wishes to import plant or plant material under these Regulations shall apply for permission to the National Bio-safety Committee. “Plant” means “a plant that has been genetically modified and imported into Jamaica for the purpose of experimentation under controlled conditions.” The Officer may order plants or plant material into quarantine. The Regulations also prescribe requirements for packing and labelling seeds. The Regulations provide for the packing and transportation of plants, cuttings and slips.

**Customs, taxes, and other financial measures**

**Customs Act (1941, amended 2005)** governs customs procedures. All imports require a formal entry certificate or warrant. The Act places a duty on imported goods, published by Jamaica Customs Tariff, which may be purchased. It requires importers to make and submit a Declaration of Value along with the import entry for clearance procedures. The customs department will verify the value declared using the following methods: value for duty based on the price paid or payable; value for duty is based upon the transaction value; value for duty determined by looking at sales in Jamaica of the goods being appraised or of identical or similar imported goods; or a determination of value for duty beginning with the cost of production of the goods being appraised.

**Customs Duties Dumping and Subsidies Act and its Regulations (2000)** impose duties on dumped (anti-dumping duty) or subsidised (countervailing duty) goods per the determination of a commission established by this Act. Some goods may be exempted in accordance with the Act as well.

Exclusive Economic Zone Act (1991 consolidated 2001) creates an exclusive economic zone adjacent to the country’s territorial sea where Jamaica has “sovereign rights” in respect of all natural resources, “exclusive rights and jurisdiction” in respect of construction and use of artificial islands and installations, and “jurisdiction” in respect of scientific resources, archaeological objects, and protection of the environment. The exploration and exploitation of all living and non-living resources in the zone is to be carried out exclusively under licences, which must be granted.

Export Industry Encouragement Act (2001) provides that an approved export manufacturer, exporting an approved product exclusively to Non-CARICOM markets receive income tax relief for ten years and exemption from customs duties and General Consumption Tax (GCT) on imported raw materials and machinery. A minimum of 5% export sales to Non-CARICOM markets of total sales must be attained to receive the export allowance.

General Consumption Tax Act (1991 consolidated 2003) provides for two main types of taxes: the GCT and Special Consumption Tax (SCT), which replaces several duties and taxes, e.g., Excise Duty, CARICOM Duty, and Consumption Duty, to name a few. GCT is paid on goods and services except those items that are zero-rated and those that are exempt from GCT. The standard rate is 16.5%, but zero-rated items are items that attract 0% GCT. The list of zero-rated GCT items includes insecticides, fertilisers, and agricultural produce exported or sold to a registered taxpayer. Exempted items are items that do not attract GCT. These items include many raw foodstuffs, milk, cornmeal, canned foods, sugar, rice, eggs, and food for school feeding programme, to name a few. SCT is payable on a few items. These are alcoholic beverages, most tobacco products and some petroleum products. Some items attract both GCT and SCT. Jamaica’s Modernisation of Industry Programme waives GCT chargeable on the acquisition of machinery and equipment directly related to the manufacturing process.

Jamaica Export Free Zones Act (revised 1998) governs the process by which manufacturers and service providers can benefit from the exemption from income tax on profits in perpetuity, as well as import duties and licensing. Requirements are that the company be registered according to the provisions of the Companies Act and export at least 85% of its production.

Shipping Act and Shipping Incentives Act requires that shipping entities receive income tax relief and concessions on import duties for up to ten years.

Stamp Duty Act (1937 consolidated 2000) requiring that stamps be affixed, with the price depending on the cost insurance and freight value of the goods. An additional stamp duty is payable on certain items, i.e. chicken (including parts), pork (including pork products), and beef (including beef products).

Access to credit and capital

Agricultural Credit Board Act (1960 consolidated 2005) establishes and sets forth the functions, powers and privileges of the Board. The Act also mandates that agricultural loan societies are under the power of the Board and may make regulations concerning loan societies, i.e. interest rates, loan terms and conditions, unpaid loan procedures, etc. The mission of the Board is to assist in the development and maintenance of the agricultural activities. “Agriculture” includes any activities relating to horticulture,
afforestation, apiculture, fish culture, fishing, the development and maintenance of pastures, the cultivation of crops and the keeping or breeding of livestock or poultry.

**Agricultural Development Corporation Act (1952, consolidated 1973)** establishes the Corporation, defines its functions and powers and provides for the establishment of a Reserve Fund by the Corporation. The Corporation shall stimulate, facilitate and undertake the development of agriculture and have powers to promote agriculture. “Agriculture” shall include fisheries, forestry, horticulture and the use of land for any purpose of the keeping or breeding of livestock, poultry or bees and the growing of fruit and vegetables.

**Agricultural Loans Act (1887, consigned1973)** allows owners or occupiers of land for cultivation to pledge crops growing on the land and other produce originating from the land as security for agricultural loans. The Act defines the effect of the pledge and requires contracts to be recorded with the Record Office. The Act also defines powers of creditors in relation with recovery of loans and defines the offence of fraud by the borrower.

**Agricultural Loan Societies Regulations (1961, consolidated 1976)** implement provisions of the Agricultural Credit Board Act with respect to agricultural loan societies, concerning: the functioning of agricultural loan societies; control by the Board of agricultural loan societies; record keeping by agricultural loan societies; and the granting of loans to agricultural loan societies by the Board.

**Farm Loans Act (1965, amend/consigned1976)** establishes a farm loan guarantee facility by the Government, i.e. a loan made by a bank to a farmer for the purpose of financing any project specified in the First Schedule to this Act and related to the farm of which the borrower is in possession. The Government shall be liable to pay to a bank losses sustained by a bank as a result of the granting of a guaranteed farm loan, i.e. a loan certified by the bank manager as such to comply with requirements as set out in the Second Schedule to this Act. Upon payment of the guaranteed amount to the bank, the Crown shall be subrogated in and to all rights of the bank in respect of the loan. A loan shall not be a guaranteed farm loan if not established upon some specified security including land or crops. The Act further grants regulation-making powers to the minister and prescribes offences.

**Farm Loans Regulations (1965, consigned1976)** implement provisions of the Farm Loans Act regarding restrictions on loans, maximum time of repayment, default in repayment, etc. The Regulations also prescribe various forms for purposes of the Act.

**Jamaica Agricultural Society Incorporation Act (1941 consolidated 1998)** establishes and sets forth the functions of the Society which is authorised to acquire interests in, or finance, companies or organisations in an effort to encourage agricultural and livestock breeding activities. Its mission to promote such activities is broad and also encompasses hosting lectures and courses on agricultural and breeding activities, amongst other things.

**Jamaica Development Bank Act (1969, amended/consolidated 2005)** establishes and defines the functions of the Bank as a corporate body responsible for providing development capital in the country and also specifically in the agriculture sector. For the purposes of this Act, an “agricultural development enterprise” means an agricultural or livestock enterprise operated on a commercial basis. The Bank may underwrite shares,
guarantee loans, sell investments, carry out transactions related to unit trust schemes and mortgages, provide mortgage loans, and furnish financial advice.

**Business formation**

**Cooperative Societies Act and its Regulations (1950 consolidated/revised 1995)** governs the incorporation and function of co-ops by regulating the process by which co-ops are registered, the manner in which dividends and profits are distributed to its members and being exempt from income tax. Co-ops may provide in its rules or by contract that agricultural produce shall be sold through the cooperative society. The Act also provides in respect of claims of societies towards its members arising from debt and relative charge on agricultural or other produce of members by the society. Voting rights of agricultural cooperative societies may be based on the size of production of each of its members.

**Jamaica Cooperative Marketing Association Protection Act (1928, consolidated 1973)** makes provision for the protection of cooperative associations, i.e. any society registered under the Industrial and Provident Societies Act, and any company incorporated under the Companies Act having as its principal object the cooperative marketing of any commodity grown or manufactured in Jamaica.

The Act prohibits trade in produce of cooperative associations other than in accordance with a contract entered into with any cooperative association to deliver to or sell through such cooperative association or in accordance with its directions any commodity grown or manufactured in Jamaica and not expressed to be made so as to exclude the provisions of this Act (“Cooperative Marketing Contract”). The Act also defines the relationship between a marketing contract and the land on which produce is grown.

**Quality measures, standards and protection**

**Animals (Diseases and Importation) Act (1948, consigned 1973)** controls animal diseases in general, regulates the importation of animals. “Animal” includes cattle, buffalo, horses, mules, asses, sheep, swine, goats, dogs, cats and all animals of whatsoever kind, whether similar to the foregoing or not. The Act also permits the inspector to declare areas infected and makes provision for the quarantine of animals and birds.

**Animal Diseases (Importation) Control Regulations (1948, consigned 1991)** prescribe rules relative to the importation of animals, fodder litter, biological products intended for use as a veterinary medicine and carcasses and the quarantine of imported animals.

**Aquaculture, Inland and Marine Products and By-products (Inspection, Licensing and Export) Act (1999, consolidated 2001)** provides for the control of fish and aquatic animals and plants and their products. The objects of this Act include: (a) advancing public health and safety standards in the export of aquaculture, inland and marine products and their by-products intended for human consumption; (b) specifying and maintaining international standards of production, harvesting, processing, handling, storage and transport of such products and by-products and to establish systems for ensuring rapid adoption and, where necessary, reinforcement of such standards; (c) monitoring the hygiene and sanitary conditions of vessels and establishments engaged in the processing of aquaculture, inland and marine products and their by-products. Other provisions deal with Inspection and certification of aquaculture, inland and marine
products and their by-products, sets forth duties of inspectors and the Veterinary Committee. Restrictions are placed on export of aquaculture, inland and marine products and their by-products and operation of processing establishments, factory vessels, freezer vessels and carrier vessels.

**Aquaculture Inland and Marine Act Regulations (2000, consolidated 2002)** regulate the catch, production, farming, etc, and processing, handling, and exportation of marine and aquaculture products. It also concerns laboratories operated by the competent authority, regulates the operation of fish product export or processing establishments and factory or freezer vessels, and regulates the harvesting and production of prescribed products, including operations on factory or freezer vessels. The Regulations also concern the residues of pesticides and heavy metals in fish products and the use of additives.

**Aquaculture, Inland and Marine Products and By-products Inspection, Licensing and Export) List of Production Areas Order (2000)** declares the areas listed to be production areas as demarcated and approved by the competent authority. In these areas, aquaculture and inland and marine products may be harvested for export.

**Food and Drug Act (1975 revised 1996)** regulates the sale, labelling/packaging, advertisement, promotion and development as well as the importation of food, drugs, cosmetics and other devices. Imports must conform to the laws of the country of manufacture. False or misleading advertisement of product is specifically prohibited. The Act regulates the sale of food, dietary food, food preservatives, food additives and poisonous substances in food and drugs for administration to animals which may be used as food for human consumption. Moreover, there is a schedule of diseases and illnesses that products can not be sold or promoted to cure under this Act.

**Food Storage and Prevention of Infestation Act (1958 revised 1973)** governs anything used for manufacturing, preparation, packaging and storage of foods. The Act also explains the authority of inspection of these moderns and penalties in the event of non-compliance.

**Meat and Meat Products and Meat By-products (Inspection and Export) (1999 revised 2001)** governs the inspection and certification of offal, meat, carcass, or meat by-product for export. The Act requires any person wishing to export these products as a business to obtain a licence, which requires inspection of the meat processing plant before licence is granted. Licenses may be suspended or revoked for violations of licence such as contamination of meat products. It also governs the issuance of licences for meat brokers. Lastly, the Act grants minister authority to promulgate regulations regarding, amongst other things, the meat labelling, handling, exposure, facilities and sanitation.

**Pesticides Act (1987 amended 1996)** establishes and sets forth the functions of the Pesticide Control Authority to register pesticides, licence the export of pesticides, inspection, and authorise pest control operators and sellers of pesticide, amongst other activities. The Authority is to appoint a Registrar and other officers and employees to carry out its activities. The Act also sets forth restricted pesticides, which may be amended by the Authority. Lastly, the Act gives the minister authority to promulgate regulations regarding, but not limited to, the handling, labelling, and application of pesticides. The Act also prescribes fines for offences against Regulations made by the Pesticides Control Authority and in general.
Pesticides Regulations (1996, consolidated 2006) regulate the importation of pesticides, the manufacture of pesticides and the selling of restricted pesticides, and to make provision for the registration of pesticides, and pest control operations, pest control applicators and servicemen, and some general issues. There are 17 regulations divided into importation, registration, sale and manufacture of pesticides, as well as pest control operation, etc. The regulations also provide that the application for the registration is required and it can be suspended, cancelled, or renewed in accordance with the provisions. Sellers and pest control operators are required to obtain licences. The regulations also list fees for licences, registration, etc.

Pesticides (Amendment) Regulations (1999) provides that the import licence fee is calculated by taking 1% of the value (cost, insurance, freight) of the pesticide to be imported.

Pesticides (Amendment) Regulations (2004) provide for operation by certified pest control applicators, and pest control operators, suspension and revocation of certificates, complaints to the Pesticides Control Authority, action to be undertaken when food for human being or animals is contaminated, stop orders by the Authority to be served on the pest control operators, pest control applicators or servicemen, powers of court, offences and penalties, inconsistent use of pesticide labels, use of pesticide containers for drawing of water and transportation of pesticides with together with food for human beings or animals.

Plants (Quarantine) Act (1994, consolidated 1996) prescribes prevention measures for plant diseases. The Act authorises the minister to: (a) declare areas infected by plant pests; (b) prohibit the importation of specified plants or articles; (c) prohibit movement of plants, persons, animals, soil, earth or manure into or out of areas declared to be infected; (d) declare a plant pest to be a notifiable plant pest and prescribe measures for eradication or control; (e) declare authorised ports of entry; (f) prescribe certification measures for the import and export of plants and plant products. The Chief Plant Quarantine Officer is required to issue certificates describing notifiable plant pests and areas, as well as phytosanitary certificates.

Plants (Importation) Control (Amendment) Regulations (1997, amended 2005) prohibits the importation of plants, plant products or plants for planting listed in an attached schedule, requires an import permit for plants, plant products or plants for planting listed, provides for inspection of plants entering the country by a plant quarantine inspector, and contains importation requirements such as a phytosanitary certificate and quarantine. The regulations declare importation of plants, plant products or plants for planting without a valid phytosanitary certificate to be an offence. Another schedule specifies fees for permits.

Processed Food Act (enacted 1959, revised 1973) sets forth requirements and offences related to the manufacturing or handling of food, provides for administration and enforcement for purposes of this Act, and prescribes offences. For purposes of this Act, "processed" means preheated, cooked, canned, reserved, frozen or otherwise treated. The Act prohibits the operation of food establishments that are not registered and prescribes the conditions relating to hygienic conditions of an establishment in order to be registered. The Act further provides for inspections and contains rules for the handling and packing of food. Under this Act, the following regulations were enacted:
Processed Food (Inspection and Sampling) Regulations (1959, consolidated 1977) provide regulations concerning inspection and sampling of processed food and the grading of food and methods of inspection and minimum rates for official sampling.

Processed Food (Establishments) Regulations (1959, consolidated 1976) mandates the registration of processed food establishments with the Director of the Bureau of Standards and provides requirements for establishments regarding construction, equipment and hygiene. Upon an application, an inspector is required to visit and report on the establishment and report thereon.

Processed Food (General) Regulations (1959, consolidated 1984) prescribe purity criteria for processed food, a certificate of export, methods for microbiological and chemical analyses and grading criteria for specified foods.

Processed Food (Grades and Standards) Regulations (1964, consolidated 1984) set forth the grades and standards for all processed foods for export or for sale in Jamaica as prescribed in the Regulations schedule. There are specific requirements for processed foods containing fruits like mangoes, marmalades, pineapples, orange juice, guava, jams, and vegetables, yams, ackee, tomatoes, meat products, frozen fruits and vegetables, etc. These regulations stipulate the concentrate, slices, colour, and chemicals and the measurements of each.

Processed Food (Prepared Syrups) Regulations (1974, consolidated 1984) provide rules for the composition of prepared syrups, i.e. a concentrated sugar solution with or without the addition of fruit and vegetable extracts, permitted food colours, food flavourings and preservatives. In particular, the Regulations prescribe standards for the use of preservatives in prepared syrups.

Processed Foods Exemption Regulations (2002, reprinted 2003) provides exemptions from the Processed Food Act for those applicants who already operate a Hazard Analysis Critical Control Point (HACCP) System or any other quality management system, which in the discretion of the Bureau of Standards, ensures food safety, having regard to the requirements of the Bureau. Upon application for exemption, an inspector must visit the site upon which time the application is denied or accepted. There is a subsequent right of appeal for all denied applications. While the exemption itself may save time and money and resources for an agribusiness, the Act itself does not set forth the costs associated with applying for an exemption and the time and money involved with the required inspection.

Standards Act and its Regulations (1985 consolidated 2003) provides for the establishment of a Bureau of Standards and the Standards Council. It develops the use of standard marks. The Bureau may make recommendations to the minister regarding the promulgation of standards and shall formulate, upon request of the minister, specifications for commodities, practices and processes. The Council shall be responsible for the policy and general administration of the Bureau. The minister may prescribe standard marks and the Bureau shall have the power to grant licences to use a prescribed standard mark.

Veterinary Act and its Regulations (1976 consolidated 1977) establishes the Veterinary Board and the Appeal Tribunal, and provides for the registration of veterinary surgeons and the control of their practice. The Board shall, among other things, register veterinary surgeons and enrol animal health assistants and ensure the maintenance of...
acceptable standards of professional conduct. Does not mandate the educational requirements or how many the country shall have at the time based on needs, etc.

Properties devoted to agricultural land

Agricultural Small Holdings Act (1946, consolidated 1997) makes rules relative to contracts of tenancy of “small holdings” i.e. any parcel of land intended for cultivation or pasturage consisting of not less than one acre nor more than ten acres held under a contract of tenancy. The Act also makes provision for the establishment of valuation boards. The Act establishes conditions and criteria for tenancy contracts between landlords and tenants of agricultural small holdings. No crop-sharing clauses may be included in the tenancy contract. No contract of tenancy shall contain any term or condition whereby the landlord is entitled to reap or market any crop on behalf of the tenant but the landlord and tenant of any small holding may enter into a separate agreement for the reaping or marketing of any crop by the landlord on account of the tenant. Valuation Boards may, for their area of jurisdiction, establish valuations in respect of contracts or holdings.

Agricultural Small Holdings Regulations (1946, consolidated 1976) define and list “prescribed trees” and “economic trees” for purposes of the Agricultural Small Holdings Act and specify certain areas in respect of which a landlord may reserve, in a rice tenancy contract, the exclusive right to graze cattle upon the holding for the period between the reaping of one crop of rice and the preparation of the land for planting the next crop.

Agricultural Small Holdings (Crop-sharing) (Bananas) Regulations (1952, consolidated 1976) prescribe that certain subsections of the Act shall not apply to any contract of tenancy of not less than five years, allowing the landlord to receive as consideration for such contract not more than of one-third of any crop of bananas grown upon the land to which such contract relates. Another section places restrictions on crop-sharing in relation to tenancies.

Irrigation Act (1943, revised 2003) provides for the establishment of an Irrigation Authority to prepare and implement irrigation schemes on land designated or within or outside the path of a water course. This Act also grants power to allow or withhold water to be taken for irrigation.

Land Development and Utilisation Act (1966 amended 1977, consolidated 1999) addresses the authority of the minister to designate land as agricultural land and requiring occupier to submit a development plan for the agricultural land. Further authority is given to the minister to take land in the event of non-compliance. The Act also governs the sale and disposition of such land. Lastly, the Act establishes a commission with authority to inspect land and require certain other information about said land.

Praedial Larcency Prevention Act (1983, consolidated 2002) defines and prohibits praedial larcency and provides for public measures to fight and prosecute this offence. The Governor-General may appoint agricultural wardens who shall be under the command of the Commissioner of Police. It shall be the duty of agricultural wardens to detect praedial larcency and to proceed as to the prosecution of offenders. The Act further defines regulation-making powers of the minister and provides with respect to disposal of confiscated perishable produce including vegetables, fruit, livestock and fish.
**TRINIDAD AND TOBAGO**

**Industrial agriculture**

**Agricultural Society Act (1919 consolidated 2006)** requires that members of the Society shall be those in the sugar and cocoa industry, and other industries and establishes funds.

**Cane Farmers Rehabilitation Board Act (1961, amended 1976/conсолidated 2006)** establishes the Board and its functions which are to increase production for cane farmers by doing, amongst other things, establishing tractor/trailer pools. Other provisions provide for the composition of the Boards, committees, and associations. Funds and resources for the Board shall come from the Sugar Industry Rehabilitation Fund and the Board is authorised to administer funds per the Sugar Industry Special Funds Act.

**Cocoa (Import and Export) Act (1921 consolidated 2006)** requires that all imported cocoa have a landing certificate issued by officer in charge of weighing the import for entry.

**Cocoa and Coffee Industry Act and its Regulations (1961 amended 1988/conсолidated 2006)** establishes a board to regulate and control the purchase and sale of cocoa and coffee. The Act requires licences for the export as well as the registration of producers, and the licensing of hulling machine owners. The Board is responsible for granting these licences and permits and is also in charge of obtaining the most favourable agreements for the sale, purchase, handling, grading and exportation of the products. The Board is also responsible for setting export quotas. Other provisions address licence exemptions, offences, penalties, appeals, etc.

**Sugar Industry Labour Welfare Committee (Incorporation) Act (1951 amended 1996/conсолidated 2006)** establishes the Committee appointed to control and administer the Sugar Industry Labour Welfare Fund. Act authorises Committee to acquire, sell, or otherwise dispose of real or personal property for purposes of the Fund. The Committee may issue mortgages or loans and the payment and interest is required to go the benefit of the Fund. The Act exempts the Committee and Fund from income taxation.

**Sugar Industry Special Funds Act and its Regulations (1948 amended 1998/conсолidated 2006)** require that a levy is placed on sugar exports for the benefit of a Price Stabilisation Fund, Rehabilitation Fund, and a Labour Welfare Fund. The Act also establishes committees for each fund and delineates the composition of each. The Act also controls how monies will be allocated to each fund.

**Sugar Quotas Act (1961, amended 1976/conсолidated 2006)** regulates the manufacture and disposal of sugar, and also mandates the quota for export and the sale for local consumption, which is changed annually. Penalties for non-compliance are listed in the Act.

**Non-traditional agriculture and fisheries**

**Control of Importation of Live Fish Act (1980)** requires that any person wishing to import fish (live or otherwise) into the country must obtain consent by notification of the minister.
Exportation of Fruit Act and its Regulation (1931, amended 1976/consolidated 2006) requires that all fruit to be packed be inspected by an approved fruit inspector and a certificate is issued. Packaging of budded oranges and grapefruit can only occur at the packaging houses of the Cooperative Citrus Growers’ Association and be brought to such houses in approved containers. Limes may only be conveyed in approved containers and packaged in licensed packing houses. The Regulations impose grading requirements as well.

Fisheries Act (1916 amended 1975/consolidated 2006) authorises the minister to make prohibitions and restrictions as to the fishing waters. The Act requires inspection and prescribes of offences.

Fisheries Regulations (1980) regulate use of specified nets, size of fish, the sale of sardines for bait, protected areas specified fish, and the dragging of nets. The maximum allowed length and width of various kinds of nets is specified. It is forbidden in the territorial waters to use other kinds of nets or the nets specified for other purposes than indicated. No fish less than the specified size shall be sold or exposed for sale. No fish, shellfish, crabs or shrimp shall be taken in specified areas of river mouths. Fish trapped in dragging nets or seine in water less than three feet of depth shall be released.

Fisheries (Amendment) Regulations (2002) regulates by-catch in fishing for mullet with nets with monofilament mesh and prohibits having on board of vessels monofilament nets or mesh of a specified size and nets of another size at the same time. By-catch of mullet, when using monofilament nets, shall not exceed 15% of the weight of total catch. The maximum allowed length and width of various kinds of nets is specified.

Fish and Fishery Products Regulations (1998) prescribe general and specific requirements for establishments for the handling of fish and fish products including vessels and for the certification of such establishments. Regulations also prescribe requirements for storing of frozen fish, vehicles and equipment used for unloading, handling, holding and transporting fresh fish for processing.

Fishing Industry (Assistance) Act and its Regulations (1955 consolidated 2006) authorises payments determined by a Fishing Officer for engines for commercial fishing vessels to the registered owners. The Regulations requires applications for registration ad authorise conditions to be applied to registration of owners. Regulations also prescribe appeals process for denied owners, fuel quotas, as well as claims for payment.

Livestock and Livestock Products Board Act (1997) establishes the Board and its member composition and appointment by the Minister of Agriculture. The functions of the Board are: to administer livestock support programmes; to promote cooperatives in the livestock industry; to monitor the industry and collect and disseminate information; to maintain a register of livestock farmers; to set quality guidelines for the sale of livestock and livestock products; to carry out other functions relative to research, advising, communication, etc. Other provisions grant regulation-making powers to the minister.

National Agricultural Marketing and Development Corporation Act (1991) establishes the Corporation which shall consist of nine members. The functions of the Corporation are to "create, facilitate and maintain an environment conducive to efficient marketing of agricultural produce and food products through provision of marketing services and stimulation of the agro-industrial sector." It may establish wholesale
markets, introduce systems of grades and monitoring of agricultural produce, take over functions of the Central Marketing Agency, etc. It may also make regulations, including marketing schemes, prohibition of sale of produce, licensing and registration of producers, etc.

**National Agricultural Marketing and Development Corporation (Southern Wholesale Market) Regulations (2000)** provide for the operation of use of a specified market and sets forth the powers, functions and duties of the manager of the market. Permits are required to operate in the market. Operators shall be submitted to medical examination. Other provisions concern the regulation of sale of food on the market and in particular meat and fish. Meat shall be certified and a licence to sell meat or fish shall be obtained. Records of sale shall be kept.

**Customs, taxes, and other financial measures**

Customs Act and its Regulations (1938, amended 2007/consolidated 2009) authorises import and export duties. The Act also appends the CET rates for CARICOM products. Other provisions address the valuation of products, amongst other things.

**Sale of Produce Act (1921, amended 1966/consolidated 2006)** requires produce dealers/sellers to be licensed. “Produce” for purposes of this Act means kola nuts, tonca beans, sugar cane, cocoa, citrus fruits and any other produce that may be prescribed by order. An application for licences is required, which may be denied or cancelled. The provisions describe an appeals process if denied or cancelled. Dealers are required to keep records of transactions which may be inspected. Other penalties, offences, and charges are listed in the Act.

**Trinidad and Tobago Export Free Zones and its Regulations (1988, amended 1996/consolidated 2009)** exempts approved enterprises from customs duties and designates a free zone are for export and trade. Approved enterprises are not subject to licences to export and import. Other concessions include exemption from income tax, corporation tax, business levy, or taxes on profits, etc.

**Value-added Tax Act (1989, amended 2007/consolidated 2009)** imposes a VAT on certain imported products and the domestic sale of products. The standard rate is 15%; however, many agricultural products have a zero-rated VAT which is listed in the Act. The Act also describes the calculation of VAT based on the value of the goods.

**Access to credit and capital**

**Agricultural Development Bank Act (1968, amended 1995/consolidated 2007)** re-establishes the Bank to foster development in agriculture and commercial fishing. For purposes of the Act, “agriculture” includes horticulture, aboriculture, silviculture, husbandry, dairy productions, and the produce of any product derived therefrom. The Credit society is registered as a co-op pursuant to the Cooperatives Services Act. Management of the Bank is administered through the Board and managing director. The functions of the Bank include opening savings and deposits, underwriting loans, engaging in joint ventures. Interest rates are determined by the Board, which cannot exceed 12%. Loan values up to $5,000 may be made by branch managers, loan values up to $30,000 must be granted by Managing Director, and all loans must be reported to the Board. Commercial fishing loans include those for fishing equipment, products, and provision of marketing facilities for fish and fish products.


**Business formation**

Cooperative Societies Act (1971, consolidated 1980) sets forth the registration, membership, formation, duties, privileges and business of co-ops (including winding up and dissolution and settling dispute). A Commissioner for Cooperative Development is appointed as a supervisory and registration authority. Any society, having at least 12 members or another co-op as its member, and established for the promotion of economic welfare of its members, in accordance with cooperative principles or a society established to facilitate the operations of such society, is eligible for registration under this Act. No co-op may represent itself as a cooperative society or credit union unless registered. The Commissioner may register a society or cancel the registration of a co-op. Other provisions address the transfer, division, amalgamation and other changes affecting the ownership or structure of co-ops.

**Quality measures, standards and protection**

Food and Drugs Act (1960 amended 1990) provides a regulatory and administrative framework for the control and enhancement of quality and hygiene standards for food intended for human consumption and drugs intended for human beings and animals. The Act also regulates the handling and placing on the market of food and drugs. The minister may require reporting on the production, importation or use of any substance specified in the order made for this purpose by the minister. The Act prohibits the sale of harmful, adulterated or unsanitary food and defines various other offences. The Act further provides for the enforcement of provisions of this Act by inspectors and for the power of the minister to create food and drugs advisory committees and to issue further rules relating to matters specified in or covered by this Act.

Food and Drugs Regulations (1990) regulate, among other things, the preparation and placing on the market of food intended for human consumption and drugs for human beings and animals. The Regulations define functions and duties of inspectors appointed under the Act, reports by analysts regarding possible violations, admittance of re-labelled or re-conditioned food or drugs, sampling, certificate of analysis, labelling of food and ingredients used for food and the labelling of drugs. The Schedules set out standards for baking powder, the use of colours in food, milk and dairy products, edible oils and fats, preservatives and other food and ingredients or other substances used in the preparation of food and substances used in drugs and contain rules relative to the carrying out of sampling and analysis of food.

Food and Drugs (Amendment) Regulations (2003) defines packaging requirements and regulates labelling of alcoholic beverages; labelling of bulk food containers; quality and naming of ketchup; standards and other requirements regarding irradiated food; quality, naming and labelling of food grade salt; and quality requirements and naming of brewery products.

Food and Drugs (Amendment) Act (2005) adds specified drugs and prohibits the distribution of samples of certain drugs.

Pesticides and Toxic Chemicals Act (1979) establishes a Pesticides and Toxic Chemicals Control Board which consists of Government officials and representatives of various organisations appointed by the minister. The Board shall advise the minister on matters relevant to the making of regulations and advise on the monitoring and
implementation of such regulations (sect. 4). The minister shall designate an officer in the Food and Drugs Division to be the Registrar of Pesticides and Toxic Chemicals. The minister may also designate analysts and inspectors, the duties and powers of which are outlined in this Act. Other provisions set forth the matters which may be regulated by the minister. The remaining provisions prescribe offences and regulate legal proceedings.

**Pesticides and Toxic Chemicals (Amendments) Act (1986)** concerns tasks of the Pesticides and Toxic Chemicals Control Board, a new Appeals Tribunal, the importation of controlled products, powers of inspectors and some matters of minor importance. The new task of the Board concerns the determination of applications for registration, licences, etc. The Appeals Tribunal shall hear and determine appeals from the decisions of the Board. A new section prohibits: (a) the importation of marketing of controlled products that are not registered; (b) importation of a controlled product without a licence; (c) storage of controlled products in a premises that is not registered; (c) manufacturing, importing, storage or use a product in another that the prescribed manner; and (d) carrying on the business of a pest control operator without a licence.

**Pesticides (Licensing of Premises) Regulations (1987)** provide for procedures related to licensing of premises for the sale, storage, packaging or manufacturing of pesticides (e.g. application, grant of licence, licences on import of classes of pesticides, etc.).

**Pesticides (Registration and Import Licensing) Regulations (1987)** provide for procedures related to registration of pesticides (e.g. application, registration, refusal to grant approval for registration, etc.) and the granting importation licences for pesticides and for the keeping of records by holders of a licence. Pesticides (Importation) Regulations (1987) provide rules for the importation of classes of pesticides relative to freight containers, warning marks, construction, labelling and marking of packages. A form of certificate of decontamination of freight container is set out in the Schedule to these Regulations.

**Pesticides and Toxic Chemicals (Amendment) Act (2005)** adds a new definition of “toxic chemical” and “exporter”. Provisions on the membership of the Board are also revised, as well as sections on export licences. The Registrar’s responsibility to supervise inspectors is also revised. Other sections are revised to allow designation of members of the veterinary Registration Board. Also, the regulation of the exportation of pesticides and toxic chemicals is added to the Act.

**Plant (Export Prohibition) Act and its Orders (1938, consolidated 2006)** enables the minister to prohibit the exportation of any plant, tree, or fruit. The exportation of bananas, and rubber plants and seeds is prohibited without consent from the Chief Technical Officer (of Agriculture).

**Plant Protection and its Amendment Act (2001)** grants power to minister to issue an order declaring notifiable diseases, prohibiting cultivation or harvesting or otherwise directing measures for the prevention or control of spreading of plant pests and diseases. Another section requires an occupier of any land to notify the occurrence of any notifiable disease to the Plant Quarantine Officer. Another section specifies the procedure which Plant Quarantine Officer shall follow for the eradication of diseases and pests. Lastly, another section 8B concerns the quarantine of land. New definitions relative to fighting of pests and diseases are added as well.
Plant Protection (Amendment) Regulations (1998) add “import permit” the words “may be refused entry” in order to ensure that unauthorised importation of restricted articles may now be denied entry.

Quarantine Act and its Regulations (1944 amended 1978/consolidated 2006) grants minister power to make regulations related to Quarantine, especially when goods enter the country and establishes a Quarantine Authority.

Standards Act (1997 consolidated 2007) provides standards for goods and the processes and practices established by the Bureau of Standards. The Bureau is established under the Act with the authority to be the national standard, quality certifying and national laboratory accrediting body. The functions include ensuring standards and promoting research of such standards. Act authorises the Bureau to examine and inspect goods once entered into country.

Properties devoted to agricultural land

Agricultural Contracts Act (1925, amended 1981, consolidated 2007) governs contracts between the contractor permitted onto the land for the purpose of agricultural cultivation of the land and the owner. All such contracts shall be registered. The Act sets forth the contractor’s rights to the land, such as the possession of the parcel cultivated, including the right to reap (includes husbandry) as well as the right to produce of trees on land, as well as contractor’s right to payment by owner under contract. Mortgaged land requires written consent of the mortgagee before entering into contract. Assignment of land/parcel is only permitted upon consent of the owner. The owner is entitled to impound animals on the land. Subsequent owners are liable as previous owners for items such as taxes, devolution/alienation of land, etc. The Act also addresses an owner dying intestate, inspection of land, rights of the parties to sue, appeals, and fees associated with contract registration and adjudications, etc.

Agricultural Fires and its Regulations (1965 consolidated 1980) applies to all lands except to urban areas designated by the minister. The minister shall appoint a Chief Fire Officer and for every county at least one County Fire Control Officer and establish a Fire Advisory Committee in a county. The officer may appoint fire guardians. The fire season for each year is defined. Persons wishing to create a fire in the fires season shall apply to the officer for a permit. The provisions also concern burning crops, specify fire prevention measures, and grant regulation-making powers to the minister and define offences.

Agricultural Small Holdings Tenure Act (1966 amended 2005/consolidated 2009) restricts the right to recover possession of holdings (land held under a contract for tenancy for agricultural purposes) in order to provide security of tenure for farmers of small agricultural holdings. The Act delineates which lands (banana, rice, cane, market garden, arboreal) are small holdings. The term of the small holding is set by the statute and can not be shortened, but can be extended. Any terms which are not in compliance with the Act are void. The Act also authorises the establishment of tribunals whose purpose is to fix maximum rent charged, etc. Other provisions provide for the inspections of the lands, hearings, appeals, redresses and investigations. Tenants may sublet or assign with consent of the landlord and tribunal can force such consent if unreasonably held.

Grove National Company Limited, both wholly owned state enterprises, to the State. The minister may, by order, transfer to or vest in the Sugar Manufacturing Company ("Company"), all or any part of the operational undertakings necessary for the Company to undertake the sugar cane processing and sugar refining business conducted by Caroni and not already leased to or forming part of lands leased to or otherwise vested in the Company. Notwithstanding the State Lands Act, the Manager of the Company shall be responsible for the development of the real estate undertakings in accordance with this Act.

**Praedial Larcency Prevention Act (1963, consolidated 2000)** introduces a series of measures to control praedaial larcency in relation to livestock. A Praedial Larcency Squad is established which consists of (police) officers appointed by the Commissioner of Police. All persons trading in livestock (any farm animal and carcass skin or head of such animal) shall be registered. Sellers of livestock shall provide buyers with a memorandum of sale. Other provisions address measures against illegal trade in livestock.

4. **Summary of Laws for the Remaining Organisation of Eastern Caribbean States (OECS)**

**Background**

In general, there are several similarities in the agricultural sector in remaining OECS member states discussed in this section, which help to explain the legal framework supporting the sector:

- Decline in production of the commodities falling within the industrial agriculture category explains the lack of robust current legislation
- A general shift away from agriculture, has caused increased focus on legislation related to the financial and tourism sector at the expense of the development of both industrial and non-traditional agriculture
- Abandoned or unused lands have not been directed back into agriculture and have been redirected to the housing market/other industries or left idle because there are no adequate laws to address how governments should address these properties once devoted to agriculture
- Other factors observed, while surveying agricultural legislation, was a lack of rules regarding development assistance (i.e. extension services, access to capital and credit, etc.) to private individuals looking to enter the sector
- Additionally, the region will need to upgrade rules on grades and standards when looking to export in the region as well as internationally.

The following briefly describes the agricultural production of each member state in this Section giving some background before going into the summary of laws.

**Dominica** – Agriculture contributes approximately 18–20% of Dominica’s GDP, second only to the services industry. Although the contribution of agriculture to GDP declined from 30% in the mid-1980s, its share tends to be higher than in other OECS countries. Moreover, agriculture still employs around one-third of the labour force and is an important earner of foreign exchange. Agricultural production includes dasheens, grapefruit, plantains, coconuts, cocoa beans, coffee, sweet potatoes, mangoes, oranges, and limes. In an attempt to diversify from the country’s mainstay in the banana industry, the country has also explored eco-agriculture and eco-tourism. While unemployment is high, agricultural labour still employs a large percentage of the population. With
agriculture commanding such a large proportion of the economy, it was expected that there would be more of a comprehensive legal framework to support the industry. However, very few laws directly impacting industrial and non-traditional agriculture were found. No legislation was found related to fisheries.

**Grenada** – Agriculture traditionally produces bananas, cocoa, nutmegs, and mace for export. Grenada is the largest producer of nutmegs in the hemisphere and as one of the two major nutmeg producers, the other being Indonesia, has benefited enormously in period of high demand and/or limited supply. For internal consumption, the sector produces fruits, vegetables and livestock for the domestic, regional and internal markets. Banana exports traditionally made a significant contribution to the development of the country.

**Montserrat** – Notwithstanding the decline in agricultural production caused by volcanic activity in the 1990s, the government has directed its policy towards achieving self-sufficiency in certain foods and meat products in an effort to reduce the island’s dependency on imports and the outflow of foreign currency, i.e. small ruminants and pigs, poultry production for meat and eggs, as well as agro-processing utilising local raw materials.

**St. Kitts and Nevis** – This government has also redirected its policy towards achieving self-sufficiency in certain food in order to reduce the country’s food importation bill. The country’s Agricultural Development Strategy notes the increasing availability of fertile land, previously used for sugar cane cultivation, import duty and port fees concessions on equipment and fertilisers, and technical assistance as key reasons for redirecting policies back to agriculture.

**St. Lucia** – This country is ranked highest in terms of its enabling environment largely due to the existence and enforcement of its fiscal incentives and taxation regime and laws such as the Fiscal Incentives Act, Trade License Act, and the Development Incentives Act. Agriculture traditionally accounted for about 8% of the GDP with banana and coconut production leading the sector.

**St. Vincent and the Grenadines** – Like other countries in this subregion, agro-processing has been identified as a mechanism to diversify the sector. For example, current projects in updating food processing facilities to ensure that they are all compliant with HACCP standards have been undertaken. Other projects include vegetable vacuum packing and bottled coconut water processing. Development is also supported by the St. Vincent and the Grenadines Development Bank and the St. Vincent and the Grenadines Cooperative Bank Ltd. Also, currently in draft is a National Small Business Development Act to promote small businesses.

**Summary of laws**

**DOMINICA**

**Industrial agriculture**
Banana Protection and Quality Control Act (1986 consolidated 1995) establishes an Authority and Committee and sets forth their functions and duties. It prescribes exemptions from duties and taxes for producers. The Act also sets forth banana packing and exportation standards, carriage and delivery, and rejectable bananas, as well as providing rules for the harvesting, handling, transporting and shipping of bananas. The Act requires growers to obtain licences. The Act requires that all bananas intended for exportation shall be grown, harvested, processed, packed, handled and otherwise dealt with and transported in the manner as prescribed.

Banana (Protection and Quality Control) Regulations (1986 consolidated 1995) implement provisions in relation with the licensing of boxing plants, the certification of growers of bananas as field packers, the handling, packaging, transporting and shipping of bananas intended for exportation and the inspection of such bananas. All exportable bananas shall be selected, processed and packed in accordance with the Banana Standards Manual issued by the Banana (Protection and Quality Control) Authority.

Dominica Banana Growers Association Act (1984, consolidated 1991) establishes the Association and defines its objects and duties. Membership is open to anyone who has in the year prior to application sold bananas from his or her holding to the Dominica Banana Marketing Corporation of not less than a specified amount. The Association shall promote the interests of banana growers, especially with the government and the Corporation. The Association shall have district branches.

Non-traditional agriculture and fisheries

Fruit Trade Regulation Act (1951, consolidated 1991) concerns the grading and packing of citrus fruit and other fruit intended for export. All fruit shall be graded and packed at the packing shed appointed by the minister under this Act. The Act also provides for the appointment by the minister of an advisory committee called the Fruit Trade Committee. No citrus fruit or other fruit shall be removed or exported from a packing shed without the approval of the manager or a duly authorised representative.

Citrus Fruit Regulations (1951, consolidated 1991) implement provisions of the Fruit Trade Regulation Act by providing rules with respect to the citrus fruit intended for exportation. Such fruit shall be gathered, packed, transported and stored in the prescribed manner and shall be subject to inspection by an officer in charge. The Regulations prohibit the exportation of rejected fruit and the tampering with containers. All citrus fruit shall be graded at the packing shed in accordance with these Regulations.

Milk Act (1922, consolidated 1991) concerns the control of quality of milk for domestic sale. Definitions of “impure”, “adulterated” or “unwholesome” milk are set forth in the Act and the sale of such milk is prohibited. The Act also prohibits the refusal to sell milk exposed for sale and provides for the seizure and analysis of milk offered for sale.

Sale of Produce Act (1995) addresses the licensing to sell certain produce cultivated from land (bay leaves, cocoa, coconuts, coffee, grapefruit, lemons, limes, oranges, and vanilla), produce peddlers and hucksters, dealers, special provisions related to the sale of vanilla (limitation on sale) and coconut (extinguish cess on coconut).

Customs, taxes, and other financial measures
Customs Control and Management (1991) addresses the procedure for the importation and exportation of goods, authority to create warehousing, authority to impose duties, drawbacks, disputes and appeals process, offences and penalties.

Development Levy Act (1987, consolidated 1991) empowers the minister to impose a levy on any commodity or service produced or sold in Dominica for purposes of development. In addition, the Act prescribes means of recovery of sums due to the State.

Access to credit and capital

Dominica Agricultural Industrial and Development Bank Act (revised 1990) establishes the Bank and its functions which are to promote and influence economic development and mobilise funds for the purpose of such development. The Bank provides loans for business enterprises in all major sectors of the economy including tourism, agriculture and agro-processing, telecommunications and other services. It also provides funding for residential housing and student loans. The majority of the bank's loans are divided between agriculture, tourism, and student loans. The Banks provides financing for larger rural development projects to smaller credit financing for small farmers.

Business formation

Cooperative Societies Act and its Regulations (1996, amended 2003) governs the formation, registration and functions of co-ops in the country. The Act requires that supervision of credit unions be accomplished by the Minister of Finance. Commissioner of Cooperatives is responsible for co-op registration, co-op promote, and supervision. The Commissioner is also tasked with resolving disputes between members, co-ops and third parties.

Quality measures, standards, and protection

Animals Diseases Act (1990) covers regulations addressing swine fever, anthrax, foot and mouth disease, etc., also addressing quarantine procedures, importation licences for all animals.

Animals Diseases (Importation) Control Regulations (1955 consolidated 1991) govern the control of importation of animals, except monkeys. A permit must be granted by the Chief Technical Officer prior to importation of animals. The Act further prescribes rules for quarantine and inspection, and contains rules for specified groups of animals, e.g.: cattle, pigs, sheep, goats; fish, turtles and birds; cats and dogs; and horses.

Food and Nutrition Council Act (1981, consolidated 1991) establishes a Food and Nutrition Council, which duties are to (a) make recommendations for a national food and nutrition policy; (b) develop a food and nutrition planning process; (e) monitor food and nutrition programmes; (d) prepare and evaluate food and nutrition projects; and (e) assist the establishment of food quality control throughout the food chain. The Council has regulation-making powers.

Foot and Mouth Disease Regulations (1954, consolidated 1991) provide for the prevention and control of foot and mouth disease. Measures include notification of diseases, declaration of suspected places, notification of a suspected place, restrictions
on the movement of animals, disinfections and slaughter of animals. They also prescribe rules to be observed in suspected places and controlled areas.

**Importation of Animals (Prohibition) Regulations (1930, consolidated 1991)** prohibit the importation of animals and animal products from countries specified in the Schedule.

**Pesticides Control (Labelling of Pesticides) Regulations (1991)** require all containers in which a pesticide is imported, transported, exposed or offered for sale or otherwise distributed, to have on it a label on which information specified in these Regulations is set forth clearly to the satisfaction of the Pesticides Control Board. The Regulations exempt pesticides manufactured exclusively for purposes of control of endoparasites in animals.

**Plant Protection and Quarantine Act (revised 1991)** addresses pest control, quarantine, export certification, importation of plants, phytosanitary requirements and certificates, importation of planting material, soil, fruits and vegetables, and cotton makes provision for the protection of plants from harmful pest and diseases.

**Plant Protection and Quarantine (Amendment) (2003)** replaces the Schedule to the Act specifying the form of a Phytosanitary Certificate.

**Plant Protection (Importations) Regulations (1942 consolidated 1991)** regulate the importation of plants and harmful organisms. Regulations provide for the restriction or prohibition of the importation of planting material, specific plants and other material, and fruits and vegetables, soil and dung, allspice, bay and related plants from certain countries, coconut palm parts, banana, cacao, coffee, sugar cane, other graminaceous plants and sweet potato (except when imported as planting material).

**Plant Protection (Import Prohibition) Regulations (1956 consolidated 1991)** prohibited the importation of fruit of the State of Florida. Fruit from other parts of the United States or passing through the United States are required to be accompanied by a certificate of the plant protection service of the country of export stating that that fruit does not originate from the State of Florida or any other place where the occurrence of the Mediterranean fruit fly has been reported and that the fruit has been examined at the place of export and that it is free of disease and insect pests.

**Plant Protection and Quarantine (Pink Mealy Bug/Hibiscus Mealy Bug Control) (Amendment) Order (1997)** specifies new criteria and conditions for the importation of plants, parts of plants or fruit from specified states to prevent the introduction in Dominica of the pest Pink Mealy Bug/Hibiscus Mealy Bug.

**Roseau Market Act (1971, consigned1991)** establishes the Roseau market, provides rules on its operation, the operation of slaughterhouses and detention stations, as well as the inspection of slaughtered animals for food and for the care of animals. A market authority, Dominica Export and Import Agency, administers the market. The Market has the authority to make by-laws for, among other things, the slaughter and care of animals, quality and hygiene of marketable commodities (including meat and fish) and in general to the sale of such commodities on the market.

**Standards Act (1999)** establishes the Bureau of Standards and defines its functions and powers. The Bureau is managed by the Standards Council and declares public standards, control on the observance of those standards and provide advice to
manufacturers on quality control. The Act further concerns, among other things, the declaration of standards and the use of standard marks.

Standards Order (2007) contains compulsory standards for labelling specified goods including pre-packaged foods. It also declares a standard called “Code of Practice for General Principles of Food Hygiene”.

Properties devoted to agricultural land

Development and Planning Corporation Act (1972, consolidated 1991) provides for the establishment of the Corporation, defines its powers and functions, and provides tax incentives for development. The Corporation is responsible for physical planning in Dominica, with the power to carry out or secure the laying out and development of designated areas. The Corporation shall have also various powers in respect of dealings in land such as acquisition, sale or lease. Sale or lease of land by the Corporation may be subject to covenants or conditions as the Corporation may impose.

GRENADA

Industrial agriculture

No measures specifically addressing industrial agriculture.

Non-traditional agriculture and fisheries

Export Fresh Produce Act requires exporter to obtain a licence. “Fresh produce” means “any fruit, nut, vegetable, root, crop, flowers, plant or plant material declared by the minister by order to be fresh produce.” The Act also prescribes rules for the packing and inspection of fresh produce. On being satisfied that a produce contained in any package is fit for export, an inspector appointed under the Standards Act shall issue a certificate showing that the fresh produce has passed inspection.

Grenada Fisheries Act (1986) provides for the promotion and management of fisheries. The Act also contained conservation measures. Under the Act, “aquaculture” includes mariculture, “fishery waters” comprises the Economic Exclusion Zone, the territorial waters and the internal waters as defined elsewhere, “fishing” includes the searching for fish. The minister may appoint a Chief Fisheries Officer and other officers as necessary. The Chief Fisheries Officer is required to prepare and keep under review a plan for the management and development of fisheries. Other sections provide for fishery access agreements and foreign and local fishing licence requirements.

Fisheries Regulations (1987) implement the above Act and prescribe the rules for an advisory committee, foreign and local fishing licences, fish processing licences, and conservation measures.

Fisheries (Fishing Vessels Safety) (1990) requires application submission by vessels to be licensed, grants authority to inspect the vessels, and prescribes the maximum and minimum number of crew members.

Importation of Fish (Regulation) Ordinance (1951) requires persons wishing to import any live fish into Grenada, to obtain permission from the governor. No permission shall be
granted for the importation of live carp, goldfish or black bass. Penalties are prescribed for illegal importation.

**Customs, taxes, and other financial measures**

**Customs Service Charge Act** charges a 5% service charge on imported goods, computed on the cost insurance and freight value. Inputs in the manufacture of commodities exclusively for exports are exempt from this charge.

**Environmental Levy Act** imposes a levy of 1% on white goods, and anywhere from 2–20% on vehicles and trucks. This levy is computed on the cost insurance and freight value.

**Value-added Tax Act** imposes a tax on the value of imported goods and services supplied from one business to another to final consumption in the country. This tax replaces the GCT. The standard rate is 15%, but zero-rated for most agricultural products and tools.

**Business formation**

**Cooperative Societies Ordinance (1957, consolidated 1978)** governs the registration, rights, liabilities, duties and privileges of co-ops. A Registrar of Cooperative Societies shall be appointed by the minister. Qualifications and types of co-op societies are prescribed in the rules. The Registrar may inquire regarding constitution, operation, and working and financial conditions of a registered society and inspect the books. Disputes among members, between members and societies, and between registered societies are referred to the Registrar for decision.

**Grenada Agricultural and Industrial Development Corporation Act (1976)** establishes the Corporation and sets forth its duties which are to: (a) assist persons in establishing, carrying or expanding enterprises by participating in share capital, granting loans, etc; (b) to foster development funds and capital markets in Grenada, and (c) mobilise and coordinate available resources. The Corporation has various divisions and is required to have a division for agricultural development. The Act also specifies the funds available to the Corporation.

**Access to credit and capital**

No measures specifically addressing access to credit and capital.

**Quality measures, standards and protection**

**Pesticides Control Act (1973)** gives the minister authority to make regulations under this Act. The Act establishes a Pesticides Control Board whose duties include advising the Minister of Agriculture on matters relevant to the making of regulations under this Act. The Act also provides inspection by sampling, and defines offences and penalties for non-compliance.

**Pesticides Control (Amendment) Law (1979)** adds new definitions for “agriculture” and “extermination”. “Agriculture” means the production and storage of any produce and includes grazing, forestry and woodland, fish culture, bee culture, market gardening, horticulture and nurseries or animal husbandry.
Pesticides Control (Approval of Pesticides) Regulations (1979) requires that only pesticides approved by the Board may be manufactured, imported, distributed or used in Grenada. Persons must submit applications for approval stating all information specified to the Board. The Board has the discretion to dispense with all of some of the requirements for an application for pesticides previously approved in another CARICOM country. Approval lasts for three years or less. If the Board denies approval or issuance of a licence, the affected person may apply to the Secretary for reconsideration of its decision by the Board.

Pesticides Control (Labelling of Pesticides) Regulations (1979) apply to all pesticides (except those for use in the control of endoparasites in animals). Regulations require all containers in which a pesticide is imported, transported, exposed or offered for sale or otherwise distributed, to have on it a label on which information specified in these Regulations is set forth clearly to the satisfaction of the Pesticides Control Board.

Protection from Disease (Plants) Ordinance (1925, consolidated 1934) requires the Governor in Council to make orders declaring infected districts, areas or parcels, for the quarantine of such infected areas, for the cleansing or disinfecting of such areas, etc. The Governor in Council may also declare notifiable diseases and infectious diseases and prescribe the measures to be taken for the treatment of such diseases. Land owners are required to notify authorities of notifiable diseases occurring on their land. The Governor in Council is also permitted to acquire land declared to be infected.

Plant Protection Act (1986) authorises the minister to impose restrictions on importation or movement of planting material, fruits, vegetables, plant products, plant pests, soil or any other non-plant article for purposes of plant protection. The minister is also authorised to prescribe protection and quarantine.

Animals (Diseases and Importation) Ordinance (1953, consolidated 1958) applies to livestock animals, pet animals, and bird, reptiles and insects, but does not apply to poultry. Inspectors are appointed and diseases should be notified by owner. Other provisions set forth powers with respect to infected places or areas, disposal of infected animals, and quarantine.

Diseases of Poultry Regulations (1953) prescribe measures, to be taken both by owners of animals and public officers, to prevent the spreading of fowl pests or infectious laryngotracheitis affecting poultry, i.e. quarantine. An inspector appointed under the rules may give directions regarding dealing with affected poultry or items that came into contact with diseases animals.

Properties devoted to agricultural land

Land Development and Utilisation Law (1981) concerns the proper use of agricultural land, the establishment of the Land Development and Utilisation Commission as a control body and its powers to enforce rules regarding the use of land. The Commission may with approval of the minister, designate agricultural land. The rule requires the occupier of an agricultural unit to cultivate land, but if not, then the Commission may declare the agricultural land in question to be idle land for purposes of this Act. The occupier is required to submit to the Commission a development plan in respect of farming of such land, if not, then the minister may acquire compulsorily a leasehold interest in the land.
The Commission is also granted, amongst other things, powers of inspection outlined in the rule.

MONTserrat

**Industrial agriculture**

No measures specifically addressing industrial agriculture.

**Non-traditional agriculture**

**Exportation of Fruit Act (1938, consolidated 2002)** provides rules relative to the exportation of fruit, i.e. varieties of fresh fruit, nut, vegetable or other raw product of any tree, plant, shrub or root to which this Act shall be made to apply by proclamation of the Governor in Council. The Act provides, among other things, for the appointment of fruit inspectors, the licensing of packing station, the inspection and certification of fruit and the destruction of diseased fruit.

**Exportation of Fruit Rules (1949, consolidated 2002)** implement provisions of the Exportation of Fruit Act in relation with, among other things, wrapping of fruit in wrapping paper approved by the Chief Fruit Inspector, cleanliness of licensed packing houses, examination of diseased fruit, quality, grading, packing transport and storage of fruit for export, trading in fruit and forfeiture of rejected fruit. The Rules also establish a Fruit Advisory Committee.

**Fruit Application Order (2002),** made under Section 2 of the Exportation of Fruit Act, shall apply to the fruit and vegetables specified in this Notice – avocado pears, beets, carrots, cucumbers, egg plants, limes, mangoes, onions, pineapples, pumpkins, string beans, sweet peppers, sweet potatoes and tomatoes. The Order effectively requires that the fruit and containers are inspected by an inspector.

**Fisheries Act (2000, consolidated 2002)** provides for the development, management and conservation of fish resources in the exclusive economic zone, territorial sea and internal waters. It establishes the Fisheries Advisory Committee, a fund called the Fisheries Deposit Account and the Fisheries Administrative Committee, which shall manage the Fund. The Act makes provision for, among other things, the inspection and registration of fishing vessels by the Chief Fisheries Officer, local and foreign fishing licences, preparation by the Officer of a National Fisheries Plan, appointment of a local representative for foreign licensees, declaration of marine reserves by the minister, declaration of fishing priority areas, protected areas and fisheries management areas by the Governor in Council, declaration of protected fish species by the Governor in Council, permits for marine scientific research and licences for aquaculture. The Act also defines offences and grants powers of enforcement to authorised officers.

**Fisheries Ordinance (1982)** governs permits for local and foreign fishing vessels, and fish processing establishments. The Ordinance also provides for additional offences and rules for legal proceedings, as well as the regulation-making powers with respect to various matters delegated to the Governor-in-Council.

**Customs, taxes and other financial measures**
Customs (Control and Management) Act (1994 amended 2000/consolidated 2002) governs customs procedures for imported and exported goods and requires duties payable on such goods. The mechanism for calculating the customs value is provided in an attached schedule. The Act gives powers of inspection, warehousing, and provides a list of restricted and prohibited goods.

The customs department recently announced implementing the use of the ASYCUDA system to simplify and streamline procedures and documentation, as well as reduce discretionary actions by personnel, amongst other things.

**Business formation**

Cooperative Societies Act (1960, consolidated 2002) provides for the registration of cooperative societies, regulates various matters in relation with registered societies, defines rights and liabilities of registered societies, provides for resolution of disputes by the Registrar and grants powers to the Governor in Council to make all such rules as may be necessary for the purpose of carrying out or giving effect to the principles and provisions of this Act. The Act also provides for disposal of produce of agriculture, animal husbandry, fisheries, etc. of members to or through a registered society.

Cooperative Societies Rules (1960, consolidated 2002) implement provisions of the Cooperative Societies Act in relation with, among other things, (application for) registration of societies, registration of members, functioning and administration of registered societies, by-laws and reference of disputes to the Registrar or to arbitration.

**Access to credit and capital**

No measures specifically addressing access to credit and capital.

**Quality measures, standards and protection**

Animals (Diseases and Importation) Act (1954, consolidated 2002) prescribes measures to control diseases affecting animals. Measures include control of the importation of animals and animal carcasses, quarantine of animals, control on the movement of animals and control of diseased or suspected animals in general.

Animals (Importation) Control Regulations (1956, consolidated 2002) provide rules relative to, among other things, importation of animals, landing of animals and quarantine of animals. Specific rules are provided for classes of animals or animal-related products such as cattle, sheep and goats, pigs, monkeys, fodder and litter, semen and biological products.

**Properties devoted to agricultural land**

Agriculture Act (1958, consolidated 2002) prescribes rules for the purpose of securing that owners and occupiers of agricultural land fulfil their responsibilities to the community to manage and farm the land so as to prevent erosion and ruination of the soil. The Governor shall appoint an Agricultural Lands Commissioner. Where the Commissioner is dissatisfied with farming practices of the owner or occupier of any agricultural land, he or she may apply to the Governor in Council to make a supervision order placing the owner or occupier of the said land under the supervision of the Commissioner. The Act defines duties and powers of Commissioner under a supervision order. The Act establishes the
Agricultural Lands Authority for purposes of appeal against directions of the Commissioner.

**Agricultural Small Holdings Act (1938, consolidated 2002)** provides for the control of tenancy contracts of small holdings, i.e. parcels of land intended for cultivation or pasturage, with or without buildings thereon, consisting of not less than a quarter of an acre and not more than 25 acres. The Act provides rules relative to contracts of tenancy. A contract of tenancy shall be registered by the landlord with the Registrar of the High Court. The Act also concerns contracts in respect of mortgaged lands, defines rights of landlords and tenants and defines the jurisdiction of Magistrates for purposes of this Act.

**Agricultural Small Holdings (Regulation of Rentals) Act (1959, consolidated 2002)** establishes an Agricultural Rent Board for purposes of control of rent of small holdings. The Board shall have the power and duty to determine the standard rent of small holdings situated in any controlled area in Montserrat.

**ST. KITTS AND NEVIS**

**Industrial agriculture**

No measures specifically addressing industrial agriculture.

**Non-traditional agriculture**

**Fisheries Act (1984)** provide for the licensing of local and foreign fishing vessels. The Act also grants the minister power to enter into arrangements or agreements dealing with access or otherwise in regard to fishery matters. Other provisions address the institutional framework for the management, planning, development and conservation.

**Fisheries Regulations (1995)** contains provisions on local and foreign fishing licences, conservation licences, and processing licences. The Regulations prohibit interfering with, or disturbing of fishing, and delineate measures to protect fishing priority areas and pollution. The minister may establish a Fishery Advisory Committee for the purposes of the Act.

**Customs, taxes and other financial measures**

**Act to Exempt Customs Duty (1974)** exempts items including agricultural related products like fishing gear, raw materials associated with the fruit and vegetable industry, packaging materials, and salts from a customs duty.

**Customs Control and Management Act (1992)** governs customs procedures for imported and exported goods and requires duties payable on such goods. The mechanism for calculating the customs value is provided in an attached schedule. The Act gives powers of inspection, warehousing, and provides a list of restricted and prohibited goods.

**Customs Tariff (Amendment) Act (2005)** applies a customs service charge (CSC) rate at 6% of the cost insurance and freight value, and on those items exempted from import duty/consumption tax, a 12% CSC.

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Export Duty Ordinance (Amendment) Act (1970) places an export duty rate on certain items, including agricultural products such as livestock (EC$15), sugar (EC$15), salt (depending on unit amount), lobster (EC$0.15/lb) and other items.

Value-added Tax Act (2010) addresses taxable supplies of goods and services and activities, tax on imports. The standard rate is 17% (10% for tourism). Small businesses with revenues of less than EC$150,000 will not be charged VAT and neither will certain basic items such as milk, infant formula, etc. VAT will not be charged on goods sold by farmers but will be paid on purchases they make (unless those services or goods purchased are zero-rated or exempt). When those products are sold in supermarkets, certain items are subject to VAT.

**Business formation**

Small Business Development Act (2009) makes provision for the development of locally-owned small businesses. The Act provides for the appointment of the Small Business Development Committee and sets out the procedure and criteria for financial and technical assistance to be granted to approved small businesses. The Act also provides for matter of administration. Fisheries, aquaculture and agriculture are listed among priority activities for purposes of this Act.

**Access to credit and capital**

Development Bank of St. Kitts and Nevis (1983) created by an Act of Parliament to provide financial and general credit services, for the purpose of achieving a reasonable rate of return on shareholders equity consistent with prudent risk exposure and the development objectives of the Bank. Agriculture & Industry make up 50% of the Bank’s loan portfolio. Various types of loans include short and medium-term loans, for personal development and Business Support Services for clients. Funding comes from the Caribbean Development Bank and the European Investment Bank. Loans must be appropriately secured via mortgages, bills of sale, guarantors, etc. Depending on the type of project, borrowers must input some type of equity which may include cash input, or any documented expenses related to the project.

**Quality measures, standards and protection**

Animals (International Movement and Diseases) Act (1987) controls the importation and export of animals, birds, fish, insects and reptiles and of animal carcasses, parts and meats, veterinary biological products, litter and fodder for the purposes of preventing the introduction of diseases into the country and the region.

**Properties devoted to agricultural land**

No measures specifically addressing properties devoted to agricultural land.

**ST. LUCIA**

**Industrial agriculture**

No measures specifically addressing industrial agriculture.
Non-traditional agriculture

Fisheries Act (1984) promotes and regulates fishing and fisheries in the country’s fishing zones, territorial sea and the internal waters. The Act also governs the management and development of fisheries and the conservation of certain areas. It also requires licences for foreign and local vessels, fish processing establishments and local fisheries management areas. The Act establishes a Fisheries Advisory Committee and facilitates regional cooperation, and contains sections on leasing of land for aquaculture.

Fisheries Regulations (1994) apply to any fishing vessel or any other vessel “capable of being used for fishing within fishery waters at a distance greater than three miles from the nearest land,” as well as inland fisheries. They address licensing for local and foreign fishing vessels. Fishery conservation measures include rules for lobsters, turtles, corals, sponges, algae, conch, sea urchins, marine mammals and freshwater shrimp and crayfish, are specified. Other provisions deal with protection of fishing in fishing priority areas and the use of certain fishing methods.

Fishing Industry (Assistance) Regulations (1973) provide for payments to be made for fuel and lubricating oil for engines registered in accordance with the Regulations upon application by owners. Other sections also outline a distribution and quota system for fuel.

Notice of the Ministry of Agriculture, Forestry and Fisheries on Closure of Sea Turtle Fishery (2010) declares that the sea turtle season shall be closed for a specified period, and that no person shall fish for, remove from the fishery waters, or at any time have in his or her possession, expose for sale, sell or purchase any sea turtle during the closed season.

Customs, taxes and other financial measures

Import and Excise Duty, by law, amounts range from 0–100%, with lower amounts applied to agricultural products.

Special Development Areas Act (1998) specifies three areas in the country to be special development areas as well as the activities, including agricultural-based and fisheries-based activities, which may be carried out in such areas. A person who wishes to become an approved developer may make an application to the minister (conditions for approval are not specified). Exemptions include taxes (import duty, consumption tax, stamp duty), duties, and income tax incentives 20% corporate tax rate, capital expense deductions, exempt from alien landholding licence fee, exempt from real property tax.

Business formation

Cooperative Societies Act and its Regulations (1999) make provisions for a variety of matters relative to registration and operating of co-ops such as: forms of registration, certification, etc. transfer of shares, annual financial statements, election and meetings of Directors, Supervisory Committees, criteria for membership, by-laws, loans, financial arrangements, etc.

Access to credit and capital
Quality measures, standards and protection

Plant Protection Act (1988) provides for the control of pests and diseases injurious to plants and to prevent the introduction of exotic species of the same. The Act introduces a series of measures against the spreading of diseases affecting plants also with respect to certification of plants and control of international trade in plants, plant products and planting material (as defined). The Act also provides for the establishment of the Plant Protection and Plant Quarantine Services by the minister and requires the minister to appoint a Plant Protection Board. The minister responsible for agriculture is authorised to restrict the importation of planting material. Importation of planting material, fruits, vegetables, plant products, plant pests, etc. requires a permit issued by the minister. The minister may, by order, regulate further the importation of such products. Exported products require certification prior to being exported. Further, the minister may make Regulations necessary to prevent the spreading or control plant pests. Pest Control Notices may be issued and where such Notice is in force, no person shall remove any planting or other specified vegetable material or soil from the land or nursery under quarantine.

Plant Protection (Amendment) Regulations (1995) inserts a new part listing commodities, like major economic crops the unrestricted importation of which would pose a pest risk in Saint Lucia. The list includes a long list of fruits and vegetables (bananas, apples), spices (nutmeg), commodities (peas, rice) and many others.

Plant Protection Regulations (1995) implement provisions designating the ports of entry, entry requirements and plants exempted from requirements, as well as phytosanitary certificate for imported plants. The Regulations also address the admissibility of fruits and vegetables, requirements for importation of in-vivo planting material of in-vitro planting material. They also make provision with respect to mail importation, packing materials, planting material subject to safeguard regulations, exportation of plants and import permits.

Plant Protection (Banana Aerial Spraying Levy) Order (1999) introduces an aerial spraying levy on all bananas exported from the country. The rate is prescribed in the Schedule. The levy shall be paid by companies licensed to trade in the export of bananas in such manner as the minister may direct. The monies so produced shall be used to defray costs of aerial spraying by the Government and to establish technical competence for the purpose of pest surveillance.

Pesticides Control Act (1975) establishes the Pesticides Control Board, which shall advise the minister in making Regulations under this Act. Members of the Board are appointed. The powers of inspectors are described. The remaining provisions concern authorisation of entry, offences and punishment, the taking of samples, and further regulation.

Pesticides Control (Labelling of Pesticides), Regulations (1987) provide for labelling of pesticides. Every container in which a pesticide is imported, transported within, exposed or offered for sale or otherwise distributed in, shall have affixed to it a label on which is set forth clearly and prominently to the satisfaction of the Pesticides Board. Some information may be omitted if the container is not large enough but must be
included on another label accompanying that container. Further specifications of labelling are given in the appended Schedule.

**Pesticides Control (Registration and Licensing) Regulations (1987)** provide for labelling of pesticides, registration and licensing, manufacturing, importation, advertising, use, purchasing, repacking, retailing, transport, etc. of pesticides. Manufacture, import, advertising, use, sale or exposing or offer for sale requires approval of the pesticide by the Pesticides Board and registration of the pesticide which shall be published in the Official Gazette. Powers of the Board as regards registration of pesticides are set forth. The appended Schedule contains forms such as: application for approval of pesticide; application for a licence to import/manufacture a pesticide; permit/licence to import/manufacture a pesticide; application for approval of premises to deal with pesticides; licence to use premises to deal with pesticides; purchase of a restricted pesticide).

**Standards Act (1990)** provides for the preparation and promotion of standards in relation to goods, services, processes and practices by the establishment and operation of the Bureau of Standards. The Act establishes Bureau of Standards and sets forth its functions and powers, which include the promotion and encouragement of the maintenance of standards for goods or services produced or used. A Standards Council carries out the general administration of the Bureau. The Council shall advise the minister on the appointment of the Chief Executive of the Bureau. Standards may be voluntary or compulsory. The minister shall prescribe a standard mark of the Bureau. The mark may be used by producers etc. after having obtained consent of the Bureau. Other sections provide for testing of compliance with standard of goods, and prohibit placing on the market or exportation of goods that fail to meet a compulsory standard. Imported goods are required to be examined by appointed inspectors.

**Properties devoted to agricultural land**

No measures specifically addressing properties devoted to agricultural land.

**ST. VINCENT AND THE GRENADINES**

**Industrial agriculture**

**Banana Industry Act (2009)** repeals the Banana Industry Restructuring Act (2001) and dissolves the St. Vincent and the Grenadines Banana Growers’ Association. The Act sets forth measures for the management, control and improvement of the banana industry. The Minister of Agriculture is responsible for the general administration of this Act. Within the Ministry of Agriculture, a Banana Division shall be established. The minister shall cause a Register of Banana Farmers to be established and maintained. The Act sets out the criteria and procedures for registration. Authorised officers may enter banana plantation for inspection. The Act further establishes the Banana Industry Fund and a Consultative Committee on the Banana Industry, provides for the licensing of exportation of bananas and grants regulation-making powers to the minister.

**Banana (Protection and Quality Control) Regulations (1985)** concern the authorisation to operate a boxing plant and contains rules for the operation of boxing plants and the selection and packing of bananas. Other provisions of these Regulations concern inspection and handling of cartons at buying depots, ship loading operations,
criteria for bananas to be considered “rejectable" or cartons to be “rejectable cartons” and the carriage of bananas.

**Non-traditional agriculture**

**Beekeeping and Bee Products Act (1941, consolidated 1991)** controls the apiaries and beekeeping in general for the purpose of prevention and eradication of diseases affecting bees. The Governor-General may declare pests for purposes of this Act and shall appoint an Inspector of Apiaries. The Inspector shall have powers of inspection as set out in this Act and shall be controlled by the Chief Agricultural Officer. All apiaries shall be registered and an owner or manager of an apiary shall notify the Inspector of the presence or the suspicion of presence of a pest affecting the apiary. The Act also sets out the regulation-making powers of the Governor-General and defines offences.

**Fisheries Act and its Regulations (1986, consolidated 1990)** addresses the promotion and management of fisheries and for matters incidental thereto and connected therewith. The Act makes provision for the development of fisheries and the protection of fish resources and marine reserves and provides rules relative to fisheries. The provisions of the Act seem to apply only to maritime areas. Other sections provide for the management and development plans, regional cooperation, Fisheries Advisory Committee, fish processing establishments, local fisheries management areas.

**Fisheries (Amendment) Regulations (1989)** provides that the close season for lobsters is 1 May to 31 August of each year. “Sale of lobsters is prohibited during the period of a closed season for lobsters except that during the first 30 days of that period hotels and restaurants may sell lobsters purchased before the commencement of the closed season.”

**Fisheries (Fish and Fish Products) Regulations (2006)** make provision with respect to hygiene and quality requirements for fish and fish products before and after landing. The Regulations contain rules relative to handling of fish on board of vessels, freezing or chilling of fish on vessels, hygiene conditions in handling and processing of fish in establishments, monitoring of conditions of production and HACCP, storage and transportation, packaging and labelling, inspection and sampling. They also prescribe standards for the chilling, freezing, smoking, canning and other processing methods of fish, the keeping of live fish and provide for the marketing of live fish and the approval of fish processing establishments. The Appendix contains rules on HACCP.

**Customs, taxes and other financial measures**

No measures specifically addressing customs, taxes and other financial measures.

**Business formation**

No measures specifically addressing business formation.

**Access to credit and capital**

No measures specifically addressing access to credit and capital.

**Quality measures, standards and protection**

**Pesticides Control Act (1973, consolidated 1991)** grants the Governor-General extensive powers of regulation with respect of matters and establishes a Pesticides
Control Board. The Board shall advise the Governor in making regulations under this Act. Inspectors may be, from time to time, appointed by the Board. The remaining provisions concern obstruction of inspectors, seizure of articles, offences and punishment, the taking of samples, and further regulation.

**Properties devoted to agricultural land**

Agricultural Small Tenancies Act (1957) makes provision with respect to contracts relative to agricultural small tenancies. The Act concerns the termination of a contract of tenancy in the case of serious offence by the tenant against his or her duty to keep the land in good order. A tenant may assign, with the consent of the landlord, assign his interest in a registered land at any time to a person or persons. Sub-letting is prohibited. Rights of the landlord are set forth and various other provisions concern the relationship between the landlord and tenant and settlement of disputes.

Agriculture Ordinance (1951) shall have effect for the purpose of ensuring that owners and occupiers of agricultural land fulfil their responsibilities to the community to manage and farm the land so as to prevent erosion and ruination of the soil. Section 4 describes the condition in which the owner or occupier shall be deemed to have fulfilled the duty aforementioned. Supervision of owners or occupiers may be imposed by the Superintendent of Agriculture, who may make an order for this purpose. Duties and powers of the Superintendent in this respect are outlined. The Superintendent shall by notice in writing served on the person to whom the order relates give directions as to the management and farming of the land affected. The Governor-General shall divide St. Vincent in agricultural areas and appoint for each area an Agricultural Area Committee. The Committee shall have powers as appeal board as outlined.

Agriculture (Amendment) Ordinance (1956) includes the cultivation of all cultivable land as duty of owners and occupiers of land and to provide anew in respect of the Agricultural Area Committees. The Committees are now composed of panels not exceeding 24 members.

**Remaining CARICOM countries**

**HAITI**

A more detailed analysis of the legal and business enabling environment can be found in Section 3.1.3. of this report. Below, please find a summary of all agriculture related legislation found to date in Haiti. A review of these laws reveal that many rules are very short (sometimes one page or less) without any technical language. The lack of comprehensiveness made it difficult to determine how capable these laws were at regulating the sector in a meaningful way. Other than a brief mention of making financial resources available, there were no laws addressing access to capital and credit for private individuals. However, the existing framework addresses technical and financial assistance to rural persons. The most extensive legislation found to date was regarding the fisheries industry. The laws detail licensing, exports, fishing areas as well as the steps, procedures, and associated costs.

Decree Regulating the Organisation and Functioning of the National Institute of Agrarian Reform (INARA) (1995) giving its mission to resolve and create national
policies related agricultural land issues, natural resource conservation and environmental protection; to organise the revision of national land structure; implement agrarian reform to benefit the land workers; develop an agrarian policy geared to optimising productivity through the establishment of infrastructure for the protection and management of land and the stakeholder participation, and specifically to small farmers.

June 26, 1986 Decree Amending the Provisions of the Laws I and II of the New (Rural) Code establishes the composition, organisation, powers and functioning of the Councils of Rural Sections Administration (CASER), which are the smallest administrative territorial entity of the Haitian Republic. These councils plan rural development, elections, and other public functions of the territorial entity.

Order integrating the Ministry of Agriculture, Natural Resources and Rural Development (MANRD) (1985) integrates the body of Basin Development of the Artibonite River and development agency of North West under the MANRD.

Order relating to the Ministry of Agriculture, Natural Resources and Rural Development creating the Office to Promote Exportable Commodities (OPRODEX) (1986) which is given the power to export promote and control exportable commodities.

**Industrial agriculture**

The Order establishing the National Coffee Institute of Haiti (INCAH) and the National Fund of Coffee (FONCAFE) (2003) addresses the development of a coffee chain from production until the final sale of the product, including the improvement of living conditions of people involved all in accordance with the national development policy. INCAH serves as the interface between the State, producers, speculators, the exporters and NGO support. The Order tasks INCAH with policy and programme formulation and quality control amongst other activities, including the management of the National Fund.

**Non-traditional agriculture**

Decree regulating the exercise of fishing rights in Haiti (1978) regulates fishing rights in Haiti and permits fishing by foreign individuals, companies and cooperatives by obtaining a permit. The order includes 147 items divided into ten chapters, namely: (1) Exercise the right to fish (2) Fishing Gear (3) Fisheries Service (4) Expiration, revocation of licences and cancellation of permits fishing (5) Cooperatives fishing and protection (6) Fish River (7) Water pollution and protection of certain species (8) Penalties (9) Special Provisions (10). See the following:

**Payment of fees and other contribution**: The registration fee for vessels is HTG2,000. There is a flat licence fee (HTG250 for industrial fishing) multiplied by (a) gross tonnage of vessel and (b) variable based on the type (bottom fish = 1, sardines = ½, tuna = 1/3, crustaceans = 2).

**Nationality criteria for fishing vessels**: Local fishing vessel defined as one owned by nationals or by companies incorporated under Haitian laws and registered in Haiti, in which at least 51% of the share capital with voting rights is held by nationals.

**Licensing and other administrative prerequisites**: Concessions and permits may only be issued to companies established under Haitian law, with headquarters in Haiti, at least

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51% of voting capital held by Haitians, and a bank guarantee of 25% of value of investment. Foreign vessels operating in national waters must obtain concession contract.

**Restrictions concerning fishing operations**: No vessel weighing over three tonnes may fish within three miles off the coast. The regulation prohibits light fishing within three miles off the coast, and only permits locals to fish in territorial waters (12 miles) and internal waters. Vessels authorised to fish in territorial waters may take only authorised species in determined zones, must respect quotas, employ Haitians as trainees on board, and submit to any inspection measures deemed necessary by authorised fisheries officers.

**Logbook and reporting requirements**: Amongst other requirements, logbooks must be maintained specifying quantities of fish taken, description of species and fishing areas, and must report on catch landed every six months.

**Exports**: Fishing products to be landed in Haiti first even if destined for export.

**Penalties for Unauthorised Foreign Fishing**: Fines for fishing without licence or in breach of licence conditions: from HTG5,000–25,000. Other penalties include imprisonment up to two years and forfeiture.

**Order prohibiting entry into Haiti of animals, plants, plant seeds and their derivatives, without authorisation of the Minister of Agriculture, Natural Resources and Rural Development (1986)** Requests must be made 30 days prior to the importation (arrival). The order sets rules for importation and control and penalties for violations and also authorises the quarantine of such items. Penalties and fines include monetary fines of HTG50 or HTG100 and up to 6–12 months imprisonment.

**Order of 14 January 1944 on the Slaughter of Heifers and Cows** regulates the conditions and the number of animals to be slaughtered.

**Customs, taxes and other financial measures**

**Declaration by the Haitian Government of 6 April 1977** establishing the boundary of the territorial waters of the Republic of Haiti at 12 nautical miles and of its Economic Zone at 200 nautical miles The Government of Haiti “declares that the administration, management and exploitation of the Economic Zone are within the exclusive and sovereign competence of the Haitian Authorities” and “decides that its exclusive economic zone expands to 200 nautical miles from the baseline from which the territorial sea is measured.” Licenses may be issued only where bilateral or multilateral agreements are in force.

**Business formation**

**Decree on the Regulation of various forms of Association with the Company Cooperation Basis (1981)** governing the general principles of cooperatives, such as membership, cooperation, control, liquidation, payment and interests. The decree also sets forth that these co-ops are exempt from state income tax, certain excise duties, and land taxes, as well as duty-free imports. It also governs funds created to guarantee loans of co-ops as well as credit union loans.
**Access to credit and capital**

The Order declaring 2000 the Year of Solidarity with the Rural Persons (2000) mobilises human, technical and financial resources for the establishment of structures for integrated development that would change the lives of rural persons.

**Quality measures, standards and protection**

See Order of 14 January 1944 on the Slaughter of Heifers and Cows in the non-traditional agriculture section.

**Properties devoted to agricultural land**

Act of 31 July 1975 creating Injunction by any landowner to develop any tract of land. This Act governs any landowner outside of urban areas to develop land most appropriate for conservation and soil productivity. The Act sets forth penalties for non-compliance. This Act gives the government authority to take land.

Act Creating a Special Fund for Irrigation (1959) permits the Ministry of Agriculture to cover the cost of design, construction and maintenance of irrigation systems by taking the necessary amounts of special fund for irrigation.

Decree of 17 March 1953 conditioning the application of Irrigation Law provides for the establishment irrigation in different regions and the procedures for water allocation and payment of the fee for irrigation.

Act establishing the users of irrigation and drainage established or controlled by the state (1952) which mandates that all rural land benefiting from irrigation and drainage established or controlled by the state is subject to payment of annual fee calculated proportional to the acreage and quantity of water delivered.

Act of 28 August 1951 coordinating the service activities of the Department of Agriculture for better management of these services – Article 11 defines the powers and duties of the Division of Water and Forests which are to control irrigation and the use of water, conservation, and the use of hydraulic power to control water systems.

Act of 4 June 1936 giving special guarantees for those who engage in the systematic cultivation of the soil, which protects individual or entity engaging in agriculture on leased land with a minimum of 50 hectares from being evicted as a result of an action by third parties. The lessee must comply with other conditions, such as the lease being recorded.

**SURINAME**

A more detailed analysis of the legal and business enabling environment can be found in Section 3.1.3 of this report. Below, please find a summary of all agriculture related legislation found to date in Suriname.

**Industrial agriculture**

No specific measures addressing industrial agriculture.
Non-traditional agriculture

See also laws related to the fishing industry in the Quality Measures, Standards and Protection Section below.

Fishing Agreement between the Government of the Republic of Suriname and the Government of the Republic of Venezuela (1985) provides that Suriname shall grant access to 100 fishing vessels which will be proposed by the Government of Venezuela. These vessels may exploit fishery resources in the fishing areas of Suriname subject to conditions as specified in the agreement (i.e. fishing with horizontal long lines and vertical hand lines, shrimp fishing with bottom-trawl nets). The Agreement establishes a Fisheries Commission. Other provisions relate to joint ventures, research, cooperation in the field of utilisation of hydrobiological resources, and dispute settlement.

Customs, taxes and other financial measures

Act relative to timber export duties (1946, consolidated 2002) regulates the imposition of duties on exportation of timber from Suriname. The duty is calculated on the foreign trade value of the timber as calculated at least once a year by the Ministry of Agriculture, Forestry and Fisheries. The duty shall be paid at the moment of submission of the notification of exportation. The notification shall mention quantity, type and value of the timber to be exported. Timber shall only be exported after inspection by customs officers. Penal provisions are included.

Business formation

No measures specifically addressing business formation.

Access to credit and capital

No measures specifically addressing access to credit and capital. But see, Section 3.1.3 discussing the Landbouw Bank, N.V.

Quality measures, standards and protection

Act on the Import and Export of Goods (2003) aims at facilitating trade in goods and services by the elimination of trade barriers and preferences. The Minister of Trade and Industry is the responsible authority under the Act. In principle, importation and exportation of goods is free. However, the Act provides a “negative list” of goods divided into three categories: 1) goods prohibited from being imported and exported; 2) goods that require a licence, and 3) goods that require special treatment, i.e. requiring sanitary and phytosanitary certificates for import and export. According to the explanatory memorandum, the Ministry of Agriculture, Animal Husbandry and Fisheries, the Ministry of Health and the Ministry of Trade and Industry are responsible for establishing an SPS, which should be responsible for the issuance of certificates. The Act also foresees a licensing system for the import and export of certain goods. Applications must be filed at the Ministry of Trade and Industry. The Act provides for a detailed procedure, including the possibility of appeal. The old negative list under the former Ordinance on Import and Export explicitly mentioned pesticides as one of the goods for which an import/export licence was required. If pesticides are to be included in the new negative list as well, there will be an overlap with the Pesticides Act, where any manufacturer, importer or
Institute transport; the appointed fisheries needs is production Fish fish carried Identification standards and requirements Decree conformity The regarding Decree fishery and the trader shall use standards rules of inspection of sets quality, internal products of each authorisation in European food to any additive Ministry of Agriculture, Animal Husbandry and Fisheries establishes criteria for fishery products to be imported from Third countries to the Community, the present Decree establishes criteria and standards for the use of additives for preservation, colouring and taste adjustment in fishery products as defined by the Fish Inspection Ordinance and prohibits use of additives in such products.

Decree of the Ministry of Agriculture, Livestock and Fisheries containing rules regarding the implementation of quality requirements for fisheries products (2002) contains general rules for hygiene on board of all fishing vessels and specific requirements regarding equipment, construction, storage and processing facilities, crew and rules that apply to vessels on which freezing of fish takes place. Chapter 3 contains rules regarding construction, equipment, staff, etc. of fish supply centres. Other provisions include internal controls, hygienic conditions for the processing of fresh fish products on land, and processing frozen fish. Other rules include those for salting, smoking, drying etc. of fish. Periodical microbiological testing shall be carried out and microbiological standards are prescribed. Chapter 9 deals with various forms of inspection and control. Identification and certification of fishery product at any stage of production shall be carried out in accordance with articles 25 to 28 of the Fish Inspection Decree. Inspected fish shall be labelled in accordance with provisions of the Decree.

Fish Inspection Act (2000) governs the production, trade, import and export of fish products in Suriname (including aquaculture) and covers the food chain from catch and production to export and sale. According to the Act, any kind of fish product must be inspected before being sold. The Minister of Agriculture, Animal Husbandry and Fisheries is the responsible authority under the Act, although in some cases the Minister of Health needs to be consulted. Inspection and control are carried out by quality managers and fisheries inspectors. The investigation of offences is carried out by special officers, appointed by the minister. The Act establishes a Fish Inspection Institute responsible for the quality inspection of fish products, with tasks such as: development of quality standards; inspection and control with respect to the hygiene situation on board of fishing vessels, landing sites and other establishments including fish farms, production process, water quality, hygiene requirements of personnel and packing, labelling, storage and transport; registering of landing sites and fish farms and the recognition of other establishments; issuance of inspection and health certificates; instruction and education of personnel; monitoring. In case of non-compliance with the provisions of the Act, the Institute is authorised to apply specified measures of enforcement. By state Ordinance

and ministerial Order, detailed rules shall be elaborated on a wide variety of issues concerning the production, trade, import and export of fish and fish products.

**Fish Inspection Ordinance (2002)** implements provisions of the Fish Inspection Act, based on guidelines of the EU. The provisions address the conditions to introduce fish products on the market, types of products, the way in which they should be handled within establishments, auto-control (HACCP), and import and export. The ordinance also addresses inspection and testing procedures. Chapter 7 concerns recognition and registration of fish processing installations.

**Pesticides Act (1972)** requires any manufacturer, importer or trader to request the minister permission to use any pesticide. Permission is valid for a maximum period of five years and can be subject to certain conditions. There is no possibility to object to these decisions. The Act requires mandatory registration of all permitted pesticides. In case of harmful effects, permission can immediately be revoked. The Minister of Agriculture, Animal Husbandry and Fisheries is appointed as the responsible authority, although the Ministry of Health may perform certain activities under the Act as well. The Act does not contain specific provisions on inspection and control. The investigation of offences is entrusted to general criminal investigators and/or other special officers, appointed by the minister.

**Plant Protection Act (1965)** makes provision for the prevention of spreading of diseases and pests affecting plants. All import of plants, parts of plants, compost and non-treated soil, plant packing material, etc. is prohibited, unless allowed by State legislation. The Director of Agriculture, Livestock and Fisheries shall be responsible for the control of importation of plants and plant material. The Minister of Agriculture, Livestock and Fisheries has the power to issue rules regarding phytosanitary certification, import of fruit and vegetables, etc. For protection of plants, an area may be declared a protected area under article 9.

**Meat Inspection Order (1961)** places restrictions on the placing on the market of meat and meat products that may harm public health and regulates slaughter of large livestock. The Order may be declared to apply to other animals. Certain articles concern the slaughter of animals. A licence to operate a slaughterhouse is required. Other articles concern the inspection of animals before and after slaughtering as well as the inspection of slaughtered and imported meat.

**Order to prevent animal diseases (1954)** regulates animal production and importation for purposes of preventing and reducing diseases affecting animals. The order outlines duties of owners or keepers of animals with respect of notification of diseases and keeping diseased animals apart from other animals.

**Foodstuffs Order (1911, consolidated 1953)** contains rules relative to the (control of) the placing on the market of all materials and goods intended for human consumption. The Inspector of Public Health is charged with the coordination of food control. Public officers appointed shall have the power to take samples of foodstuffs which are offered for sale. Food may be confiscated. Article 10 empowers the Governor to issue rules regarding manufacturing, preparation of processing of food, whereas rules regarding transport, storage, and supply or vending of food may be made.

**Properties devoted to agricultural land**
Act relative to land for agricultural use (1936, amended 1982) regulates the use of plants and trees present on the public lands tenured in long-term lease. The tenant has the free right of exploitation or other use of trees and plants if not otherwise expressly provided in the hereditary lease order and subject to payment to the President of charges for the logging of valuable timber species. If on the land timber is processed or balatan or other forest products are exploited, except for own use, the tenant shall be subject to payment of such levies and charges as are applicable to such activities on land of the domain, except in case of exemption pursuant to a concession.

3.1.2 Options and opportunities in the existing trade agreements: relevant trade agreements’ impact on intra and extra-regional trade

Results’ integration of the Caribbean Single Market Economy

This report has chosen to address the opportunities under the Caribbean Single Market Economy (CSME) first since it is evident that options in this new era of reciprocal trade would only materialise in a significant manner through regional integration. This idea is not new. Economic integration both intra and extra-regional has been studied and reported on before. Several reports and stakeholders interviewed during the in-country field studies in the region argue that regional integration is necessary to operationalise the EU–CARIFORUM Economic Partnership Agreement (EPA) and reduce trade deficits in the region.

After the creation and development of the Caribbean Community and Common Market (CARICOM), an integration plan was intended to coordinate and enhance the collective economic and social development of 15 countries. After three decades of incremental success, CARICOM’s strategy for achieving complete economic integration is now culminated into two phases of implementation of the CSME, formally established on 1 January 2006. The last phase is intended to be completed in 2015. CSME was first envisioned at the 10th meeting of the Conference of Heads of Government of the Caribbean Community in July 1989 in Grenada. The CSME consists currently of Antigua and Barbuda, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago. Most are not hopeful that full integration can occur since CARICOM is a highly trade-dependent region undergoing major changes to its economic relationships with the world. Each country would have to make deeper commitments to integration. While there may be some hesitation to implement the following ideas, the region’s strong dependence on external markets reinforces the rationale for completing the CSME.

Opportunities for intra-regional and extra-regional integration

CSME must complete an intra and extra-regional integration scheme by harmonising grades and standards, encourage and promote the regional transfer of services and human capital, pooling resources to build a strong export platform, and integrating to provide efficiency in the delivery of public services.

Harmonising standards: There is a need and opportunity to create harmonised grades and standards to meet international market standards. Most if not all the countries examined in this study had their own mechanisms for implementing standards for food
quality and safety. The reoccurring comment received, however, was that in order to increase trade opportunities within the region, agreements would have to make between member states to harmonise those standards. As members of Caribbean Regional Organisation for Standards and Quality (CROSQ) and the Caribbean Food Safety and Animal Health (CFSAH), the region could use these entities as the main mechanism to accomplish this. Not only does the CSME contemplate this kind of synergy but so does the EPA, as discussed below. Regional accreditation in other sectors has been developed, like the Caribbean Accreditation Authority for Education in Medical and other Health Professions which applies to six member states. Therefore, while this kind of integration may have some constraints, it can be done.

*Encourage the regional transfer of services and human capital:* CSME anticipates an improved ability to recruit skilled workers from across the region. Provisions under Chapter 3 of the Revised Treaty permit skilled personnel and low-skilled labourers and their families as well as business enterprises to take advantage of job opportunities within the CSME. This is in alignment with many of the investment incentive related policies that several countries within the region have in attempt to promote cross-border investments.

*Building a strong export platform:* Stakeholders interviewed in during the in-country field studies all expressed extreme interest in setting up an export platform. This platform would go beyond the technical support and overseas trade shows that exporters receive through various programmes in the Caribbean. This programme, explained in greater detail in the Section 4 of this report, would be operationalised by the region by collectively developing an overseas trading house where goods could be packed and shipped and therefore creating the opportunity to become a direct distributor in the country.

*Integrating to provide efficiency in the delivery of public services:* Unlike Trinidad and Tobago, the rest of CARICOM must import energy: 13 of 15 CARICOM members have signed PetroCaribe Energy Cooperation Agreements with Venezuela for the purchase of oil on deferred payment terms. The region should continue explore these partnerships through CSME and determine how the region can effectively provide much needed public services, like sanitation, public transportation, and regional healthcare provision.

**Selected multilateral and bilateral trade agreements**

**Economic Partnership Agreement – EU and CARIFORUM**

Under the terms of the EU-CARIFORUM Economic Partnership Agreement (the CARIFORUM EPA), for all products originating in CARIFORUM countries and exported to the EU (other than rice and sugar), the Agreement has brought about a duty and quota free access (DFQF) regime effective 1 January 2008. The CARIFORUM EPA also includes a protocol implementing the UNESCO Convention on cultural diversity, and provides CARIFORUM artistes and other culture related services suppliers with opportunities for the temporary movement of persons, and for co-production market access.

The CARIFORUM EPA covers more subject areas than any of the EPAs executed by ACP countries. The Agreement covers trade liberalisation of goods, a reciprocal regime for trade in services and investment, regulations on competition policy, public procurement, and intellectual property.
The Agreement is unlike most other free trade agreements in that the purpose has been touted as getting Europe’s former colonies in Africa, the Caribbean, and the Pacific (the ACP countries) prepared for trade liberalisation through sustainable development and poverty reduction. The intended benefits of the CARIFORUM EPA are to make imports cheaper, eliminate unilateral preferences accorded to CARICOM exports, increase production, increase exports to the EU and as stated in the Agreement. It is presumed that the European Development Funds is a financial protocol put in place via the Agreement to help assist ACP countries in regional integration, improved governance, social development, improved governance, environmental sustainability, and improved trade negotiation tactics and governance. There have been several advantages touted under the CARIFORUM EPA, some of which are: 1) access to the European Union for trading ACP products, including agriculture; 2) the reinforcement of regional integration schemes; and 3) lower prices for capital and intermediate goods.

For purposes of this report, it is important to focus on the following sections of the CARIFORUM EPA:

- Regional Integration Measures set forth in Article 4
- Provisions on Tariffs (i.e. Article 11 prohibiting the imposition of any trade-related internal taxes and charges other than anti-dumping and countervailing duties)
- Rules of Origin Measures in Articles 15 and 16, and the Protocols (i.e. Protocol 1)
- Financial Services measures in Articles 103–108
- Public Procurement and Market Liberalisation in Articles 165–182
- Fifteen National Schedules outlining the liberalisation of goods over the 25-year implementation period

Overcoming challenges created by the CARIFORUM EPA

In addressing the shortcomings that implementation of the Agreement creates (i.e. cutting import duties, increased international competition), it is significant to analyse them in the context of the purported advantages of the Agreement.

Removal of all tariffs and quotas on Caribbean Exports to the EU

One of the purported benefits of the Agreement is the removal of tariffs and quotas per Article XXIV. As many countries in the region rely on these mechanisms for revenue, the benefit would have to be derived from ways to replace this revenue or build a foundation wherein countries would actually benefit from the removal of tariffs and quotas. Full market research would need to be done to predict the actual impact of the removal of these trade mechanisms. It is difficult to hypothesize the short-term and long-term monetary effects that this would pose, however, one idea is to possibly focus on the goods currently protected by very high tariffs, and also focus on goods for which the EU has the greatest supply capacity. A recent report conducted by the Jamaica-based Caribbean Policy Research Institute (CaPRI) and the Centre for International Governance Innovation (CIGI), the study found that, the economic effects on the four countries studied – Jamaica, Guyana, Trinidad and Tobago, and St. Lucia – would likely be minimal, although it will likely produce challenges for smaller Caribbean governments. The report
cites that in the case of Jamaica, exports have only increased by 1% while imports have increased by 0.6% leaving the overall effect of the CARIFORUM EPA negligible.39

One would be mistaken to come away from such findings believing that the economic challenges posed by the CARIFORUM EPA are insignificant. There are several points to make. One, the report’s findings signify a very important point, which is that while the Agreement is purported to create sustainable development and “eradicate poverty,” the net effect or trade benefit is miniscule even for some of the more capable, larger economies in the region. Secondly, this report has analysed the data available up to now, which is just the effect of phasing out of tariffs and quotas over the past couple of years. It has not (and realistically cannot) measured the long-term effects to occur over the 25-year implementation period. Further, few studies may be able to compute the other trade-related internal taxes and charges that produced revenues for each country and what the long-term effect of the loss of these revenues could do to their economy. (See Article 11 prohibiting the imposition of any trade-related internal taxes and charges.)

**Opportunity: creating a platform for competitiveness in trade.** In addition to the technical assistance to support the removal of these mechanisms in the form of fiscal reform (See Articles 16 and 22), the development provisions of the CARIFORUM EPA emphasize financial and technical support to address the challenges the Agreement poses for the region’s public and private sectors, but no provision has identified the specific types of financial and technical resources. Article 135 on competitiveness and innovation facilitates support through diversification programmes, promotion of joint investment and ventures, technical assistance, and the promotion of industrial cooperation between economic operators, to name a few. These mechanisms are just a few of the ways, the Agreement anticipates supporting the initiatives of the CARIFORUM EPA. While still not specific, the language identifies an opportunity for the region to create sustainable import-export platform with the EU, through this notion of “cooperation for innovation” touted in Article 135. To manifest the regional integration provisions of the Agreement, the opportunity would be for the region to unify its efforts to accomplish this. Article 135 calls for support through the promotion of joint investments and joint ventures, diversification of products, and industrial cooperation, which are the key elements of building an export platform for agriculture. This opportunity is explained in greater detail in Section 4.

**Foreign direct investment and new markets for Caribbean companies and professionals to offer services in the EU**

Annex 4 of the Agreement lists those service sectors that the parties have identified, which is pretty broad. While the services mainly focused on in the Agreement are subsectors like tourism, the Annex does list agriculture, aquaculture and fisheries are listed. Further, the investment provisions in the Agreement contemplate creating a commercial presence in a third country through the supply of services.

**Opportunity: capacity building through joint venture investments.** The in-country field studies have identified synergies between the Caribbean and the EU in agricultural trade in Holland (i.e. Suriname’s trade relationship is significant) and England. The team identified through various interviews that both countries have a significant amount of

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individuals from the Diaspora. This niche market has only been marginally capitalised in the agricultural sector. By developing the value-added sector, the team has identified some key strategies in Section 4 that the Caribbean can use to enter third markets. One way to accomplish this, which is encouraged by the language of the CARIFORUM EPA is by EU companies going into joint ventures with Caribbean companies to develop the value-added sector in a real way. Not only will Caribbean companies benefit from the knowledge of understanding how to operate in EU markets, but there may even be an opportunity to see real and consistent market placement of Caribbean value-added goods in the EU. Legally, there were no major hurdles or hindrances identified in the relevant legal framework as it relates to joint ventures. The only point to raise here is that both Haiti and the Bahamas are excluded from the service and investment chapters.

Benefits from the revised rules of origin

This aspect of the CARIFORUM EPA has been promoted as being extremely important to manufacturers of processed foods and fisheries who import raw material outside of the Caribbean. Those who promote this idea see potential increases in the value-added sector.

Opportunity: increased exports to the EU. Many of the stakeholders in the processed foods sector interviewged during the in-country field studies expressed that they already obtain the majority (if not all) of their raw materials from abroad. Further, many of the countries listed have favourable tax incentives and duty exemptions for those producers importing raw materials. However, many interviewees expressed a desire to see the Caribbean scale up their production of the raw materials so that they could stop importing them from the US and the EU. Until this is accomplished, the rules of origin create an opportunity to export goods to the EU qualifying for preferential market access as these goods would be considered of local origin. Commentators acknowledge that considerable gains can only be gained here if production in the value-added sector is sufficiently large enough.

EPA’s aid for trade and committing to EUR165 million under the EDF

The CARIFORUM EPA identifies resources in a joint declaration on development cooperation, annexed to the Agreement. The availability of EUR165 million for financing the 10th EDF Caribbean Regional Indicative Programme (CRIP) is complimented by aid for trade contributions by Member States of the EU. Only a portion of funding under the EPA has actually been committed, making it difficult to determine opportunities under the Agreement for the region. Under the EDF’s Regional Strategy Paper, the available funds tend to be focused on regional economic integration and cooperation (including EPA implementation and capacity building). The key is also to have a regional mechanism in place to funnel funding, which is also discussed in greater length in Section 4.

Caribbean Basin Initiative

The Caribbean Basin Initiative (CBI) was created in 1983 under the US Government enactment of the Caribbean Basin Economic Recovery Act (CBERA). The CBI was later expanded in 2000 through the US-Caribbean Basin Trade Partnership Act (CBTPA). In 2009, the World Trade Organisation (WTO) Council for Trade in Goods approved a waiver request from the US on the CBERA, to remain valid until 2014, which provides the legal authorisation for CARICOM to export goods covered under CBERA to the US duty-
free. Under the provisions of the CBI, products made in the Caribbean are granted completely duty-free entry into the US market, provided that at least 35% of the products’ appraised value originated in the Caribbean country (the origin requirement can be reduced to 20% if not less than 15% of the product value is represented by United States or Puerto Rican content).

**Opportunity:** It has been observed that 64% of all CARICOM exports to the US are not under any preferential trade programme like the CBI. The same data shows that the aforementioned exports benefit from limited import charges and a 0% ad valorem tariff rate. Of these items, agricultural products include lobster, tuna, shrimps, and prawns.\(^{40}\) Further, there is no provision in the Agreement which explicitly implements US foreign direct investment in Caribbean as it relates to goods covered under CBERA. Although, much of the textile manufacturing related foreign direct investment is as a result of the trading environment this Agreement created. Therefore, to say that there is an opportunity for agricultural products beyond the seafood mentioned above to enter into US markets under the CBI is a well understood notion. Further, while not explicitly stated in the Agreement, the opportunities for US foreign direct investment in this sector can also be made available through the trading environment created by the CBI. The only issues revealed in this present study is: (1) the market competitiveness with Latin American countries as a result of countries gaining parity with Caribbean countries with respect to access to US markets, i.e. via North American Free Trade Area (NAFTA) or competitive pricing, and (2) the investment laws within the Caribbean which make it easier, or harder for foreign investors to funnel investment in-country.

**Canada/Caribbean Programme (CARIBCAN)**

Enacted in 1986, the Canada/Caribbean programme (CARIBCAN) is a preferential trade agreement that, along with the General Preferential Tariff and most favoured nation status, extends duty-free access to the Canadian market for 96% of imports from CARICOM. Commodities excluded from CARIBCAN include certain agricultural products as well as some textiles, clothing and footwear. The only members excluded from CARIBCAN are Haiti and Suriname. Products manufactured or assembled in CARICOM can be exported to Canada free of customs duties. In certain countries, at least 60% of the ex-factory price of the product must originate in Caribbean country or Canada, making the country’s input potentially low and still qualified for duty-free entry if the Canadian raw material input is very high. Canada and CARICOM are also party to a Trade and Economic Cooperation Agreement which serves as a framework for bilateral cooperation and discussion.

In 2007, Canada contributed over CAD2 billion in development assistance to CARICOM. In 2008, bilateral trade between CARICOM and Canada was approximately CAD2.5 billion and total Canadian exports were valued at CAD906.5 million which were surpassed by CAD1.6 billion in imported goods from CARICOM. Trinidad and Tobago receives the majority of Canada’s exports, the Bahamas accounts for the second largest portion, and Jamaica also receives a large portion of Canadian exports to the region.

**Opportunity:** Main imports into Canada from CARICOM in 2008 were rum and tafia with a value of CAD23 million or 38.9% of total agrifood imports, fresh papayas at CAD7.1 million or 12.1%, beer made from malt at CAD3 million or 5.1%, undenatured ethyl

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alcohol at CAD2.7 million or 4.6%, and sweet potatoes at CAD2.5 million or 4.3%. In light of this data and the enabling rules of origin provisions in the CARIBCAN programme, there appears to be an opportunity to not only scale up production of processed foods, but also, explore opportunities to expand joint venture investments between Caribbean and Canadian companies in agribusiness surrounding the types of agricultural products already being exported to Canada (i.e. papayas, sweet potatoes, etc.).

Further, the private sector can and should take advantage of the Caribbean Diaspora and cultural presence in Canada. The same can be said for the US market. This presents (and always has) a great opportunity to get value-added products into this third market. However, as mentioned earlier, sustained market placement into Canada will require more than introductions into overseas trade shows. As discussed in the Strategies portion of this report in Section 4, the actual presence of Caribbean regional brokers or overseas trading houses is necessary to successfully penetrate the overseas market.

CARICOM/Venezuela and CARICOM/Colombia free trade agreements

Both free trade agreements with CARICOM allow for the exportation of products without incurring custom duty charges, provided that at least 50% of the export value of the product is local value-added or the final product is classified under a different tariff heading from any of the material inputs. Goods manufactured can use materials from third countries, provided that they result from “a substantial transformation” which results in a different product characterized by being classified with a harmonised system (HS) heading which is different from the raw materials.

The provisions in both agreements address trade promotion in that the parties agree to establish trade promotion programmes and facilitate, organise, and execute official and private activities, fairs, and expositions, conduct market studies, and facilitate an exchange of information. The provisions also address financing trade between the parties. Lastly, the agreement anticipates trade in services for the development of both economies.

Opportunity: Duty-free CARICOM exports to Venezuela include slips and cuttings of citrus and ornamental plants, trees, shrubs and plants of edible fruits, rose bushes, live orchid, citrus, and coffee plants, pepper (including crushed and ground), ginger, nutmeg, and ice cream and similar products. Duty-free CARICOM exports to Colombia include preserved fruits, nuts, jams/fruit jellies, coffee (includes un-roasted), papayas, fresh and dried bananas, cashew nuts, coconuts, fish fillets (frozen), lobster, fish meat (minced or frozen), pepper sauce, red kidney beans, other sauces, condiments (excluding tomato ketchup and mayonnaise), ice cream, bottled purified water, aerated beverages, beer and stout, rum, bitters, other alcoholic preparations, essential oils, wood in the rough and sawn, non-coniferous wood, wooden statuettes, wooden handicrafts, baskets and articles of basket work, wicker work, wooden office and kitchen furniture.

As mentioned with respect to the CARIBCAN Agreement, the enabling rules of origin provisions present an opportunity to not only scale up production of processed foods, but also, explore opportunities to expand joint venture investments between Caribbean and Venezuelan and Colombian companies in agribusiness surrounding the types of agricultural products already being exported to these Latin American countries. Additionally, public/private partnerships could also facilitate the agreement’s commitment to trade finance.
It is also worth mentioning that at the time of the submission of this draft report, the Guyana and Venezuelan governments entered into a USD38 million agreement secured by Guyana’s President and signed by its Minister of Agriculture, Mr. Robert Persaud and Venezuela’s Minister of Food Production for shipments of rice paddies to commence in October consisting of 50,000 tonnes of paddy at a cost of USD420 per tonne and 20,000 tonnes of white rice at USD700 per tonne. The agreement is expected to attract revenue to the industry. This type of regional arrangement helps to illustrate the regional integration intended in order to strengthen trade relationships and overcome challenges that the new era of trade liberalisation will bring.

**CARICOM/Dominican Republic and CARICOM/Costa Rica Free Trade Agreements**

This free trade agreement with the Dominican Republic, entered into in 2001 (along with the Framework Agreement in 1998), creates a reciprocal trade agreement with CARICOM MDCs (more developed countries): Barbados, Guyana, Jamaica, Suriname, and Trinidad and Tobago; and a reciprocal trade relationship with CARICOM LDCs (less developed countries) post–2005. The agreement provides for the elimination or the phasing out of duties on all goods except for those which might be identified as “sensitive.”

The Protocol to the Agreement lists a selected group of agricultural products, which would normally be traded duty-free, that are subject to most favoured nation duty rates in periods of glut in order to “avoid the adverse effect of demand on local production resulting in serious losses to producers/farmers.” The Protocol also addresses the free movement of investments and business persons between the territories.

The CARICOM/Costa Rica Free Trade Agreement, signed in 2003, provides for free trade or preferential access for a wide range of products. Like the agreement with Dominican Republic, some sensitive products have been excluded. A special list of products will be granted differentiated market access between Costa Rica and each of the CARICOM MDCs, with a reciprocal trade relationship under the Agreement. CARICOM LDCs and those in the Organisation of Eastern Caribbean States (OECS) benefit from duty-free access for exports to Costa Rica and are not required to grant similar access to Costa Rican products. CARICOM MDCs such as Barbados, Guyana, Jamaica, Suriname and Trinidad and Tobago, in turn, provide duty-free access to most products from Costa Rica. The Agreement contains provisions for the settlement of disputes, the application of anti-dumping measures and for the parties to enhance their SPS measures. The agreement also provides for a review of the trade agreement by parties to consider inclusion of provisions on trade in services, investment, and competition policy and government procurement.

*Opportunity:* Please see sections above for opportunities under this Agreement.

**CARICOM/Cuba Trade and Economic Cooperation Agreement**

The CARICOM/Cuba Trade and Economic Cooperation Agreement was signed in 2000. While not fully enforced, the Agreement being provisionally applied on a bilateral basis between Cuba and the six CARICOM member states, which have completed the internal measures to give effect to the Agreement – Belize, Guyana, Jamaica, St. Kitts and Nevis, St. Vincent and the Grenadines and Trinidad and Tobago. This Agreement also provides duty-free access to certain goods. Agricultural goods include, meat, fish, shrimp, milk,
peas, melons, ginger, nutmeg, curry, wheat, flour, coconut, sugar, cocoa, fruits, juices and concentrates to name a few.

**Opportunity:** Please see sections above for opportunities under this Agreement.

**ALBA/TCP: Bolivian alternative for the Americas and the Caribbean**

The Bolivian alternative for the Americas (ALBA in Spanish) is a project to counteract the US-backed Free Trade Area of the Americas. Through the People’s Trade Agreement (TCP) is to promote regional integration among Latin America and the Caribbean. Born out of initial agreements forged between the governments of Venezuela and Cuba in December 2004, it involves cooperation pacts covering a wide range of areas such as energy, health and culture. Latin American member countries are: Cuba, Venezuela, Nicaragua, Ecuador, and Bolivia. CARICOM members are: Antigua and Barbuda, Dominica, and St. Vincent and the Grenadines. Guyana joined this summer as an observer. Various other countries involved through the institutional components of ALBA are: Argentina, the Bahamas, Belize, Brazil, British Virgin Islands, Colombia, Ecuador, Grenada, Guyana, Jamaica, Montserrat, Paraguay, Saint Lucia, St. Kitts and Nevis, Suriname, Turks and Caicos Islands, and Uruguay.

**Opportunity:** To promote development and integration, this summer, the Guyana and Venezuela entered into an ALBA funded agreement to execute a feasibility study, and the environmental impact study of the proposed Venezuela–Guyana road link from Georgetown to Tumeremo. The Caribbean Development Bank (CDB) is responsible for the selection of consultants. CDB will act as the conduit for the resources for the conduct of the pre and feasibility studies on the proposed road link. Other opportunities like this as well as the trade promotion activities mentioned above are options under this relationship.

**Belize/Guatemala Partial Scope Agreement**

The Belize/Guatemala Partial Scope Agreement (PSA) is a bilateral agreement between Belize and Guatemala which was given effect in April 2010, when the Guatemalan President has recently issued a decree to that effect. The Agreement allows for the bilateral trade of 150 specified products and specifies automatic elimination of tariffs by 50% and 100% which fall under a particular category. Under this category, Belize will be able to sell at preferential tariff margins to Guatemala products such as: tilapia, yellow maize (up to 20,000 metric tonnes at 0% duty), black beans (up to 875 metric tonnes at 0% duty), rice, toilet paper, doors, windows, wooden and wicker furniture, matches, most citrus fruits and concentrate, mangos, guavas, watermelons, pineapples, plantains, among others. The agreement also provides for Belize to gradually eliminate its tariffs it charges on Guatemalan imports by 50 and 100% over three years for those products categorized. Lastly, the Agreement provides for a gradual elimination of Belize’s tariffs on Guatemalan imports by 50% and then 100% over a five-year period is contained in the last category.

A Certificate of Origin is required when preferential tariff treatment is claimed, which will be determined by Belize’s Custom and Excise Department for exports to Guatemala. The rules of origin provisions provide that to qualify for origin criteria, goods have to be wholly produced or substantially transformed.

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**Opportunity** – Guatemala currently imports products from the US, Nicaragua, and Ecuador that they have identified can be imported from Belize. The agricultural products include: orange juice (spirited, sweetened or unsweetened, and frozen), kidney beans, fresh fish, livers and roes, frozen shrimps and prawns, in shell or not, fish, crustaceans, molluscs, aquatic invertebrates, meat and edible meat offal, live poultry, live swine, bovine animals, and maize. With the additional provisions in the Agreement which provide for trade in services, investment, and trade via roads, there is a good opportunity to explore some of the trade options described in the previous sections.

3.1.3 In-country and cross-border investments: legislative environment, regimes and the facilitation of local and foreign direct investment

Investment in the agribusiness industry has been studied by identifying opportunities for local, cross-border, and international development. This section does not attempt to regurgitate that which has already been established, but instead attempts to identify key factors in the legislative environment and the business policy regime in the region that facilitates capital investment and agribusiness growth. Many countries in the region purport to have centralised organisations that promote investment, otherwise known as one-stop-shops for economic growth. After interviewing stakeholders in the public and private sector, as an outgrowth of the in-country field studies conducted over the past several months, certain key factors were identified as essential to investment potential. The first is access to technical support and the administrative process. This factor explores the entities that purport to be one-stop-shops for business and investment in each country as well as public sector initiatives that facilitate investment. The second factor is access to capital, which goes beyond each country’s ability to attract capital investment, but explores the capacity provide capital to the agribusiness sector. Lastly, one of the most important factors is the investment incentives created and used to drive the agribusiness sector.

**Antigua and Barbuda:** The Antigua and Barbuda Investment Authority (ABIA) formed by the Investment Business Corporation Act provides for the legal formation international business corporations and insurance companies, banking, trust, and estate allocation services, portfolio management, and corporate administration. The Enterprise Development Department of ABIA provides technical assistance to business in the country, both locally and internationally. ABIA promotes several programmes like the small business loan guarantees, tax incentives, the Free Trade and Processing Zones, etc, all of which could drive investment if geared towards agribusiness on a concentrated level. As for access to capital, the country has established the Antigua and Barbuda Development Bank to provide credit to farmers and others involved in agriculture and fisheries on preferential terms to stimulate investment in the sector. There are also fiscal incentives created through tax exemptions mandated by the legislation also help to promote investment both domestic and international.

**The Bahamas:** This country also has an investment authority which serves the same purpose. The Bahamas Investment Authority (BIA) operates from the Office of the Prime Minister and is responsible for developing investment policies, promoting investment, evaluating project proposals, and monitoring/supporting projects. Specifically, as it relates to agriculture, the Bahamas Agricultural and Industrial Corporation (BAIC) is a quasi-governmental agency whose mission is to develop small and medium enterprises and stimulate employment through facilitating access to finance via its micro-lending...
programmes, technology, business services, market research, and formulating business and market strategies through technical assistance. In addition, the country's Development Bank is authorised to provide a variety of loans to small businesses. Also, the Bahamas government, mandated by legislature, can also grant small business guarantee loans. Though, it appears that these entities were created to promote domestic and cross-border investment, the emphasis on agribusiness seems to be limited. However, the potential to develop such programmes around the sector does exist in the country.

**Barbados:** The Barbados Investment Development Corporation (BIDC), discussed earlier in this report, provide technical assistance and market research to several sectors of the national economy. As it relates to agriculture, the BIDC recently concluded a study where they identified opportunities to export products to Guadeloupe and Martinique. The agricultural products identified in these reports were biscuits, juices, soya bean oil, condiments and sauces, and rum cake. In order to implement trade, the BIDC endeavours to make trade missions to both countries and the BIDC is currently requesting that those interested producers in the private sector contact their Research or Export Promotion divisions. This is just one illustrative example of how entities within a country can provide technical assistance and provide a roadmap for those interested in investing in agriculture. Also, as discussed earlier in the report, the Barbados Agricultural Development and Marketing Corporation (BADMC) continue to play a significant role in providing support and access in the sector.

**Belize:** Belize’s BELTRAIDE, which stands for the Belize Trade and Investment Development Service promotes economic development through investment promotion and entrepreneurial development. In observing the entrepreneurial assistance provided during the in-country field study, it is quickly realized that this was an important factor of the entity. All proposals for foreign investment and special incentives are processed by BELTRAIDE. Not only does BELTRAIDE provide small and medium enterprise development, but it also provided marketing and promotion of Belize products and business facilitation. The technical assistance component is also important, which is performed through BELTRAIDE’s work with training small business to create plans, productivity and quality management, etc. BELTRAIDE also provides fiscal development programmes, business facilitation, and access to finance programmes. BELTRAIDE’s programmes make it one of the few comprehensive resource centres observed during the in-country field studies.

In addition, the country has other entities such as Belize Enterprise for Sustainable Technology (BEST) which has small credit programmes and project implementation programmes for agribusinesses. Lastly, this system is supported by the finance system through entities like the various credit unions and the Small Farmers Business and Bank whose purpose is to stimulate the economy by providing loan assistance to small business, and the St. Martin’s credit union. In addition, Belize has enacted the Export Processing Zone Act and the Commercial Free Zone Act (providing tax exemptions and designating areas adjacent to the airport, the Mexican border, and within Belize City as free zones), along with the Fiscal Incentives Act to provide special incentives to business investors. The International Business Companies Act was promulgated to promote international investment. In addition, Belize has bilateral investment treaties with Austria, El Salvador, China, Italy, Netherlands, and the United Kingdom. However, this past April, the government passed the Supreme Court of Judgment Act which gives Belize jurisdiction to issue injunctions against international investors and arbitrations, which
stops them from continuing international arbitration proceedings. Non-compliance could cost international investors $500,000 or jail time.

**Dominica:** Dominica has a Dominica Invest Authority (DIA), which is promoted as a one-stop-shop for all investors, including those looking to invest in the agribusiness sector. The government has established an Agricultural Investment Unit created to address the investment needs of the sector, process investment proposals from stakeholders, promote investment opportunities, and provide technical assistance to farmers and agri-entrepreneurs in order to develop their businesses. There is also the Dominica Agricultural Production and Exporters Limited (DAPEX), formerly known as the Dominica Banana Producers Limited. Additionally, the Dominica Agricultural Industrial and Development Bank established under the law attracts funding from the government and donor agencies and provides loans for business enterprises in all major sectors of the economy including tourism, agriculture and agro-processing, telecommunications and other services. It also provides funding for residential housing and student loans. The majority of the bank’s loans are divided between agriculture, tourism, and student loans. The banks provide financing for larger rural development projects to smaller credit financing for small farmers.

**Guyana:** The Guyana Office for Investment (Go Invest) is the country’s primary contact for investors and exporters. Go Invest has identified several opportunities in agriculture that investors both domestically and internationally should explore. In addition to sugar and rice exports primarily to the EU, the organisation has identified many agro-processing projects and non-traditional agriculture projects. In fact, out of the entire allotment of investments lead by local investors in 2009, the majority of them were controlled by foreign investors and joint ventures between locals and foreigners. Of these projects, the majority of them were in the agricultural sector. Foreign Direct investment projects have grown in the US, Canada, Brazil, China, Mexico, Venezuela, and India, as well as regionally, in Trinidad and Tobago, St. Kitts and St. Lucia. Go Invest initiatives are supported by legislation that addresses issues such as corporate formation and taxation, income tax, labour, small business, investment, securities, trade unions, and fiscal incentives. Additionally, the New Guyana Marketing Corporation (NewGMC) is responsible for promoting and facilitating an export platform for Guyana products.

**Grenada:** The Grenada Industrial Development Corporation (GIDC) was created under the legislation in 1985 as a one-stop investment agency. GIDC is tasked with providing policy advice, as well as promoting industry development. GIDC has identified several joint venture opportunities in the agricultural sector. Some of these projects are: 1) a biotechnology centre to develop and diversify the agricultural sector, and 2) expanding a cottage industry in order to increase regional and international exports of essential oil and food products. Investment plans involving agribusiness receive certain fiscal incentives as well. These incentives include tax credits on all trade expenses and research and development, tax exemptions on interest payments on loans, customs duties, consumption and excise taxes. GIDC sets forth the approximate time frame and administrative steps involved in investment as well as provide access to applications for incentives and starting up businesses.
**Haiti:** Private investment appears to be a key factor in developing Haiti’s future. The government attracts foreign investment by providing tax incentives for businesses, i.e. full tax exemption during the first five years of business operations and income tax exemption for a period of 5–15 years. However, most foreign direct investment has occurred in the petroleum and energy sectors. The country’s efforts are driven by the government’s National Office for Investment Promotion in charge of foreign investment. PromoCapital, headquartered in Washington, DC, became Haiti’s first investment bank in the country in 2004, with some of its key objectives being sourcing partners for family-owned businesses and offering credit guarantees to farmers and small and medium enterprises. While there is substantial potential for investment both domestically and internationally, there has not been a focus on the agribusiness sector. There is also increased competition from the Dominican Republic which has a more structured enabling environment. Also many businesses focus on the resale of imported goods at marked up prices, which does not promote to the economic viability of the country. The recent conference on Haiti business investment and reconstruction delineated a few top priorities which would help to facilitate domestic and cross-border investment: 1) decentralising development outside Port-au-Prince; 2) diversifying Haiti’s economy into different sectors and in different regions; and 3) further developing critical infrastructure like ports, airports, sanitation and telecommunications. In addition, development of the country’s investment laws would also need to begin in order to support initiatives to attract domestic and cross-border investments.

**Jamaica:** Jamaica’s trade and investment centre for information, training, and access to local industries and business is JAMPRO, Jamaica’s investment and export promotion agency. JAMPRO has a division geared specifically towards agro-processing and agribusiness. The bulk of the international investment in this sector comes from the US and the UK. The office provides both technical and financial assistance to investors. The enabling investment laws that support these initiatives are the Jamaica Export Zone Act, the Shipping Act, construction laws and other policies and programmes. Additionally, the Exchange Control Act is a key piece of legislation that facilitates the free movement of capital to other countries for investment. JAMPRO also has a division that provides technical assistance to investors whose investments will contribute to the country on a developmental level. Other agencies and organisations that support and supplement these services are too many to list; however, it is worth noting the Jamaica Exporters’ Association (JEA), which has recently implemented a National Exportation Strategy. The Association looked at key exports between 2000–2008 and developed a strategy using public and private entities to promote exports.

**Montserrat:** An investment promotion agency similar to the others mentioned in this section of the report was not found in Montserrat. However, the government has a development unit which serves many of the same functions. Both local and foreign investors are afforded duty-free impost and tax holidays and exemptions. Export-oriented industries qualify for 5–10 year tax holiday and duty-free imports in accordance with the Fiscal Incentives Act, 1975. Economic and fiscal policy is geared toward achieving overall growth of the economy. These incentives are subject to the approval of the Executive Council of the Ministry of Finance and Economic Development. Foreign investors are also permitted to own land per the government’s approval provided by the Alien Land Holding License. All foreign-owned enterprises require the government’s approval to trade in Montserrat. 100% ownership of a local company is permitted; however, foreign investors can explore conducting business as a branch, joint venture or partnership, or as an
individual. Further, it is recommended that foreign investor proposals are submitted directly to the Minister of Finance and Economic Development. The agricultural sector is one of the primary priorities for investment. Investment is supported by ordinances addressing international business companies, fiscal incentives, income tax, exchange control, foreign currency levies, as well as double taxation exemption treaties with the UK, Denmark, Norway, Switzerland, Japan, and Sweden.

St. Kitts and Nevis – The St. Kitts Investment Promotion Agency (SKIPA) has no formal technical assistance initiative under its programming, but does provide administrative assistance to investors looking to invest in agribusiness. All foreign investment proposals are approved by the Ministry of Finance. SKIPA has featured the agricultural sector as a main investment priority for the country and has further identified three investment opportunities within the sector: 1) packaging and storage facilities, 2) inter-regional transport services, and 3) commercial farming. These initiatives are supported by the country’s Agricultural Development Strategy, previously discussed in Section 3.1.1, which aims to increase production within the country to meet local demand of agriculture. Other government policies also support these efforts by providing incentives to investors. Investors enjoy tax holidays of up to 15 years, tax rebates of up to five years, corporate tax reductions, and no capital gains tax. Investors are also exempt from custom duties on material and equipment deemed necessary to establish or update an enterprise. The country also enacted a Citizenship by Investment Programme under the Citizenship Act 1984, whereby persons that make a minimum investment of USD350,000 in an approved project on the island or make a minimum contribution of USD200,000 into the Sugar Industry Diversification Foundation will be entitled to apply for citizenship.

St. Lucia – The St. Lucia National Development Corporation (SNDC) and the St. Lucia Chamber of Commerce, Industry & Agriculture-Business Development Unit work together to provide resources and information for agribusiness investors in the country. SNDC facilitates foreign investor visits, assist with project site selection and partner solicitation through joint ventures. Technical assistance includes assisting with the preparation of paperwork for the approval of fiscal incentives, licences, etc. The St. Lucia Development Bank (SLDB) established by law is an institution which provides access to capital and technical assistance. SLDB was re-established in February 2009 with equity of EC$20 million, long after the previous bank had been merged with the National Commercial Bank creating St. Lucia Bank back in 2001. SLDB accepts proposals from those in the non-traditional agriculture markets, land for crops, cold storage, farming and irrigation equipment, fisheries, etc. However, the documentation needed to access this type of loan facility appears to be quite extensive. Licenses, certifications, permits, and technical reports are required from the Ministry of Agriculture depending on the type of project. As well as permission from other Ministries depending on what the project entails (i.e. permission from Ministry of Health if agribusiness involves pig, goat, sheep, small ruminants, etc.). This extensive list of documentation does not include the loan collateral documentation involved. It is unclear how long this process would actually take for a loan to be approved. Although St. Lucia is ranked as the top Caribbean country by the World Bank in terms of efficiency in doing business, it is unclear if the ranking takes into account the process as it relates to agribusiness. It is also important to note that the Ministry of Agriculture has provided concessions to farmers on agricultural inputs, such as removing local taxes on animal feed for livestock producers. Concessions like this are intended to encourage agribusiness investment. Additionally, the Cabinet approved the construction
of an 8 acre public/private clearing house/agricultural marketing complex to serve farmer organisations and communities as a one-stop-clearing house for agricultural products.

**St. Vincent and the Grenadines:** Invest SVG (re-branded from the previous name, National Investment Promotion, Inc.) is the country’s one-stop centre to promote investment, especially foreign direct investment. Invest SVG along with the Ministry of Agriculture, Land and Fisheries has identified several investment projects in agro-processing involving items such as coconuts, dasheen, cassava, arrowroot, poultry, and other fruit products. They have identified partners for potential joint venture initiatives as well as entities that can provide technical assistance to start up these projects. In addition Invest SVG acts as a liaison between investors and government entities that interface with the business venture, as well as providing assistance to streamline the documentation process. Investment incentives include import duty and tax exemptions, as well as other tax holidays and exemptions.

**Suriname:** While Suriname has no foreign investment code, the country is currently looking at its investment laws enacted in 1991 in order to analyse how they can be revised to promote not only foreign direct investment but local private sector investment as well. The government negotiates each proposal for investment individually. The Chamber of Commerce would then issue business licences and registrations. The Ministry of Finance offers fiscal incentives and duty-free importation to existing companies and tax holidays depending on the project. Although there is the Suriname Business Forum which facilitates dialogue on private sector development issues in the country, there is no one-stop-shop where investors can obtain guidance and technical assistance. During the in-country field study, the Ministry of Trade reported on many ongoing studies to analyse the enhancement of the business environment with the agricultural sector identified as one where the country intends to enhance competitiveness and investment. This Ministry also implemented approximately one SMEs’ Unit a year, which are currently identifying markets in CARICOM and gathering information on other markets. In addition, the Ministry of Industries and Investment Promotion is currently composing a foreign direct and domestic investment guide to simplify processes, such as setting up limited liability companies, business licences, and registration. Through the Landbouw Bank N.V. (English translation: Agriculture Bank), those in the agricultural sector have access to credit and asks the Ministry of Agriculture to conduct technical assistance and training for its clients. 60% of its portfolio is in agriculture, and of that amount, 40% are in the rice sector, the other 20% are in fruits, vegetables, and other non-traditional agriculture. The Bank receives much of its funding from the EU and specifically, Holland.

**Trinidad and Tobago:** The Tourism and Industrial Development Corporation (TIDCO), once one of the most prominent companies to market Trinidad and Tobago ceased operation in 2005 in order to focus on tourism. However, the Business Development Company, Ltd. (BDC) is touted as the main engine implementing the government’s enterprise development policy and the country’s trade promotion organisation since the dismantling of TIDCO. BDC provides services such as promotion, trade assistance, training, advisory & technical assistance, as well as export certification for businesses. Under its trade assistance unit, BDC assists with standards implementation, research and development, export training, promotion, best practices, and business mentorship. Food
and beverage is a featured sector in BDC’s programmes, which includes processed products. BDC also provides a loan guarantee facility for businesses.

3.1.4 Findings, conclusions and a proposed system for ownership, implementation and the enabling environment

To date, no comprehensive bodies of laws were found which address a system for ownership and implementation in the agriculture sector. A proposed legal framework and system would incorporate all of the following categories:

- Administrative Law
- Agricultural Leases
- Agritourism
- Alternative Dispute Resolution
- Animal Feeding Operations
- Animal Identification
- Animal Welfare
- Aquaculture
- Bankruptcy
- Biosecurity
- Biotechnology
- Business Organisations
- Checkoff Programmes
- Clean Water Act
- Climate Change
- Commercial Transactions
- Commodity Programmes
- Conservation Programmes
- Cooperatives
- Country of Origin Labelling
- Corporate Farming Laws
- Disaster Assistance/Crop Insurance
- Environmental Law
- Estate Planning and Taxation
- Finance and Credit
- Food Labelling
- Food Safety
- Forestry
- International Law and Organisations
- International Trade
- Labour
- Landowner Liability
- Local Food Systems
- Marketing Orders
- National Organic Programme
- Nutrition Programmes
- Packers and Stockyards
- Perishable Agricultural Commodities
- Pesticides
- Production Contracts
- Renewable Energy
- Secured Transactions
- Specialty Crops
- Sustainable Agriculture
- Urban Encroachment
- Water Law

To be certain, all of the aforementioned categories would need to be created in each country in order to provide a comprehensive legal framework that would support agriculture in the region. One body of law which needs to be created and developed is agricultural real property. As countries determine how to utilise, take, grant, and cultivate agricultural lands, real guidelines need to be in place to assist this process. While the existing laws in Jamaica and Trinidad and Tobago provide some guidance, legislation must cover five distinct areas:

- Possession – methods used to possess or take agricultural land whether by private individuals or by the public sector.
• Land use – each country needs a nationwide legal framework delineating how agricultural lands are to be developed, zoned, and dedicated for agricultural use (which should also incorporate the development of non-traditional agriculture).

• Management – this correlates to the possession methods and land use strategy; each country can have specific guidelines on how they intend to manage the transfer and development of agricultural lands; public as well as privately owned. Additionally, each country can and should have a Register of all agricultural lands in the area.

• Land security – laws related to this category would ensure private individuals that they need not worry about unlawful takings of land, or personal property, produce or chattel on said lands. For in the event of such an occurrence, specific agricultural land laws have penalties prescribed for offenders which would be strictly enforced.

• Development strategy – this strategy need not be some initiative drafted by a particular Ministry, but instead should be specifically enacted into a body of law particularly addressing agricultural lands. This strategy can and should be revised frequently to account for new developments, feedback, and changes in other related laws.

On a regional level, the trade agreements, starting with the purposeful integration of the CSME. Options and opportunities under each of the trade agreements, which were discussed in greater detail in Section 3.1.3, are:

• Harmonising standards – a survey of the laws for each country reveal a real potential to harmonise standards related to agriculture successfully. Country laws which provide a good example are Belize’s HACCP, SPS regulations

• Encourage the regional transfer of services and human capital

• Building a strong export platform

• Integrating to provide efficiency in the delivery of public services

• Creating a platform for competitiveness in trade

• Foreign direct investment and new markets for Caribbean companies and professionals to offer services in the EU

• Capacity building through joint venture investments

• Benefits from the revised rules of origin

• Increased Exports to the EU and increase duty-free exports to Latin America – taking advantage of the opportunities in the existing trade agreements

Lastly, on a macro-level, while one-stop centres for information and assistance for investors looking to provide local and foreign direct investments are key, a more important initiative would be the creation of a large regional body of legislation which could support the initiatives attempted under the CSME. This legislation, which would have the full force and effect of the law in each country, would be helpful in showing private individuals the steps involved in and what is required to operate under the agricultural sector in the region. In addition to the work currently being done now to implement a Common Agricultural Policy for the region, stakeholders should explore whether or not this policy should be transformed into sound legislation incorporate significant mechanics and steps to buttress a regional strategy for the agricultural sector.
3.2: Trade, agribusiness sector data and trade information platform

Summary of main findings – introduction
This section examines the data for each CARICOM member state as it relates to the factors relating to agriculture, domestic production and imports and exports of food items. This report provides a description and analysis of the statistics at the following levels.

3.2.1 Overview of the factors of production with special reference to

- Number of holdings by size of holding for each CARICOM member state
- Number of holders by age group
- Total land area operated for agricultural purposes
- Total arable land
- Land utilisation subdivided into cultivated crop-lands (cultivation of permanent and temporary crops), lands classified as “wood/forest lands”, permanent meadows and pastures, lands under fallow.

5. The above information was sourced from:

- CARICOM member states agricultural census Reports
- Specially designed surveys
- Farmers Registration Programme, and
- FAOSTATS website

6. The information from these sources cover different periods and as such the data would not reflect the current status of agriculture as it relates to the number of holdings and the land area available for cultivation of crops. This is particularly so, given the changes in land utilisation and significant internal migration from rural to urban based communities within the CARICOM member states.

7. The following is a brief summary of the sources of data utilised to evaluate the principal characteristics of agricultural holdings in the region:

- Data for the Bahamas, Grenada, St. Vincent and the Grenadines and Dominica were sourced from agricultural censuses conducted in 1995
- Data for St. Kitts/Nevis were obtained from the agricultural census report which was conducted in 2000
- Data for Trinidad and Tobago were obtained from the 2004 agricultural census
- Data for Barbados were obtained from a survey of agricultural holdings conducted by the Ministry of Agriculture in 2006
- Data for St. Lucia were obtained from the 2007 agricultural census report
- Data for Jamaica were obtained from the 2004 agricultural census preliminary report
- The Ministry of Agriculture and the Central Statistical Office of Antigua/Barbuda conducted an agricultural census in 2007. The information from this census is not yet available
- Guyana has never conducted an agricultural census. A review of all databases to date does not provide statistics similar to agricultural census details. The Bureau
of Statistics provided data on area of crops cultivated and harvested for the period 2006. This data was used to extrapolate estimates on number of holdings by size of holding. The extrapolation inputs were based on the average coefficient as obtained from the nine CARICOM countries for which information were available

- Suriname and Belize. A review of the literature as well as websites relating to agricultural censuses did not include any recent data for Suriname and Belize. The latest data were for 1984 and given significant changes in land utilisation, the data from this source was thought to be not applicable. The Ministry of Agriculture (in these two countries) databases included current estimates on area of crops cultivated and harvested for the period 2004–2008. This data was used to extrapolate estimates on a number of holdings by size of holding. The extrapolation inputs were based on the average coefficient as obtained from the nine CARICOM countries for which information were available

- Haiti. A review of the literature as well as websites relating to agricultural censuses did not include any recent data for Haiti. A special report in 2010 by the FAO and the Haiti Ministry of Agriculture, Natural Resources and Rural Development provided some general estimates on land area utilised for agricultural purposes as well as some indicators on average size of holdings. This limited data were utilised in conjunction with some of the statistical parameters in CARICOM member states (with information) to extrapolate the number and distribution of holding sizes in Haiti for the period 2010

3.2.2 Domestic production of crops, meat, livestock and fish production

**Production of crops** is subdivided into temporary crops and permanent crops. Temporary crops are further subdivided into vegetables, root crops, condiments and pulses and grains. Permanent crops are further subdivided into export crops, tree crops and fruits. Each sub-classification is further subdivided by crop type. Data on domestic production are provided by crop types for the period 2004–2008 and in some cases 2009. This information was obtained from either the Ministry of Agriculture and or the National Statistical Offices within the CARICOM member countries.

A review of the production data revealed that the coverage was mainly applicable to the major crops and/or crops which had organised marketing channels. As such, a number of minor temporary crops which constitute part of the domestic food supply are not included in the coverage. In addition, a number of fruit and tree crops which were not planted initially for commercial purposes are not included in the estimates on domestic production. These crops are crops are currently being harvested and commercialised.

The methodology used in the compilation of domestic crop production varies from country to country. This study did not permit a rigorous review with reference to the methodology; however, officials with responsibility for data collection, processing and dissemination emphasised a need for improved data collection systems that are both timely and reliable. In addition, surveys should also be designed to incorporate forecasting techniques to enhance efficient marketing of domestic produce at both the national and international levels.

Meat production were obtained from specially designed surveys or computed from slaughtering at public and private abattoirs. Data from public and private abattoirs were raised to include animals slaughtered by households. In the case of poultry and table egg production (for some member states) estimates were based on the supply of imported chicks and the use of industry coefficients to estimate domestic output.
Fish (marine) production estimates were provided by the Fisheries division and were principally based on fish landed at the major landing sites. The methodology varied from country to country and was basically dependent on both the availability of human and financial resources.

3.2.3 Trade flows

This section provides information on imports and exports of food items by each CARICOM member state for the period 2004–2008. The tables in this report were processed by an IT specialist and were based on inputs from the databases of the statistical division at the CARICOM secretariat. The following is a summary of the data classifications presented in this report.

DOMESTIC FOOD EXPORTS: This is sub-divided into ranking of export items by highest value, major divisions and principal trading zone and country of destination.

Export profile of food items: The data in this table sorts export commodities (at the six digit SITC41 rev. 3 classification) by value (highest to lowest) for the period 2008. The data includes (in most cases) food items which account for approximately 80% and more of the total value of exports. Food items which account for this level of export earnings range between 5% but <8% of the total number of food items exported in 2008. The analysis as presented in country reports at the subsection level identifies these export commodities and their relative contribution to export earnings.

Exports by major divisions: The information in these tables includes data at the division level (two digit SITC rev. 3 classification) for the period 2004–2008 for each member state. In addition, the data in tables are ranked to identify the divisions that are significant in relation to the value of food export earnings. Finally, the analysis provides data on both the quantity and value of the major export commodities within these divisions.

Exports by major trading/economic zones and countries of destination: The information in this classification provides information on the value of food exports by country of destination including the economic block/zone in which these countries are classified. The data presented identifies/ranks the trading countries/economic zone via level of trade over the reference period, 2004–2008.

IMPORTS OF FOOD ITEMS: This is subdivided into ranking of import items by highest value, major divisions and principal trading zone and country of destination.

Import profile of food items: The data in this table sorts import commodities (at the six digit SITC rev. 3 classification) by value (highest to lowest) for the period 2008. The data includes (in most cases) food items which account for approximately 80% and more of the total value of food imports. Food items which account for this level of import earnings range between 5% but <8% of the total number of food items imported in 2008. The analysis as presented in country reports at the subsection level identifies these import commodities and their relative contribution to the food import bill.

Imports by major divisions: The information in these tables includes data at the division level (two digit SITC rev. 3 classification) for the period 2004–2008 for each member state. In addition, the data in tables are ranked to identify the divisions that are significant in relation to the value of food imports. Finally, the analysis provides data on both the quantity and value of the major import commodities within these divisions.

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41 SITC – Standard International Trade Classification
Imports by major trading/economic zones and countries of destination: The information in this classification provides information on the value of food imports by country of origin including the economic block/zone in which these countries are classified. The data presented identifies/ranks the trading countries/economic zone via level of trade over the reference period, 2004–2008.

3.2.4 Construction of crude food balance sheet

This section utilises data as obtained from the production and trade statistics to estimate the “domestic supply” of food commodities that have been recommended to meet the objectives of this project. The construction of data for this table is obtained by the following formula for the 35 targeted agricultural enterprises.

\[ \text{Domestic supply} = \text{domestic production plus imports} \text{ minus exports} \]

The integrity of the results is highly dependent upon the reliability of the data with special reference to domestic production as well as the volume/quantity as reported in the trade statistics. A review of the data in this sector reveals the following areas of weakness and coverage.

- **Domestic exports of food items but no corresponding domestic production data:** This is due in the main to the limited range of commodities included in the coverage in the estimation of domestic production.
- **Negative domestic supply:** This is due to non-coverage of crops in estimation of domestic production as well as in some cases errors in recording the true volumes of food import or export items.

Given the uncertainty and or weakness as identified above, the conclusions drawn must be treated and or handled with caution. This is especially so since domestic supply cannot be equated with food supply. The construction of food balance sheet is a specialised statistical exercise requiring statistical inputs to measure the flow of the commodity from production to final consumption. Given, the time constraint for this project and the human resource allocation, the construction of crude food balance sheet for the 15 member states is not practical.

**SUMMARY STATISTICAL ANALYSIS AT THE REGIONAL LEVEL**

Section 3.2.1.01 Characteristics of agricultural holdings

The total number of holdings by all CARICOM member states is estimated at 1,360,140 with a land area of 1,976,641 hectares. The following is a summary of the main features.

- **Landless farmers** are categorised as agricultural holders who do not own/operate lands but are involved in agricultural activities in the rearing of livestock and or cultivation of crops on very minimal plots at their place of residence. The farm population in this category is estimated at 182,268 or 13.4% of the population of agricultural holders.
- **Small farms** are defined as holdings with <four hectares. This category of farms is estimated at 1,134,293 or 83.4% of the farm population. This category of farms occupies 854,650 hectares or 43.2% of the total agricultural land area. The average farm size is estimated at 0.75 hectare.
Medium-sized farms are defined as holdings between four and 20 hectares and are estimated at 34,189 or 2.5% of the farm population. This category of farms occupies 313,137 hectares or 15.8% of the total agricultural land area. The average farm size is estimated at 9.16 hectares.

Large farms are defined as holdings over 20.0 hectares and are estimated at 9,389 or 0.7% of the farm population. This category of farms occupies 808,853 hectares or 40.9% of the total agricultural land area. The average farm size is estimated at 86.15 hectares.

**Table 3.2.1.5: Profile of Agricultural Holdings in CARICOM Countries**

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Holdings</th>
<th>Total (Hectares)</th>
<th>Medium (Hectares)</th>
<th>Small (Hectares)</th>
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<td>3,692</td>
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<tr>
<td>Jamaica</td>
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<td>668</td>
<td>3,692</td>
<td>18.27</td>
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<tr>
<td>Trinidad and Tobago</td>
<td>208</td>
<td>4,360</td>
<td>668</td>
<td>3,692</td>
<td>18.27</td>
</tr>
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</table>

**Notes:**
- Bahamas, St. Vincent and the Grenadines, St. Kitts/Nevis, St. Lucia and Dominica account for 2.1% of the total population of holdings and occupy 3.8% of the total land area in the CARICOM region identified for agriculture. The holding population of these countries ranges between 0.1% and 0.7% relative to the region’s population. Similarly, the land area in these countries under agriculture range between 0.3–1.1% of the region’s agricultural land.
- Five countries namely Barbados, Trinidad and Tobago, Grenada, Suriname and Belize account for 9.5% of the total population of holdings and occupy 13.6% of the total land area in the CARICOM region identified for agriculture. The holding population of these countries ranges between 1.0–3.7% relative to the region’s population.


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population. Similarly, the land area in these countries under agriculture range between 1.1% and 4.3% of the region’s agricultural land

- Guyana holding population is estimated at 8.8% of the regions and 10.5% of the regions land area under agriculture
- Jamaica holding population is estimated at 16.8% of the regions and 16.5% of the regions land area under agriculture
- Haiti holding population is estimated at 62.7% of the regions and 55.6% of the regions land area under agriculture
- No estimates are available for Montserrat and Antigua/Bermuda

### 3.2.2 Domestic production of crops, meat, livestock and fish production

A review of production trends for the CARICOM region is outlined below:

#### 3.2.2.1 Vegetable production

Production in 2008 was estimated at 427.4 million kg and represented a marginal increase of 2.5% when compared to 417.0 million kg in 2004. A review of the data revealed that Haiti and Jamaica accounted for 77.6% of total output over the period 2004–2008 with individual contributions of 42.2% and 35.4% respectively. A further review of the data revealed that Guyana, Trinidad and Tobago and Suriname accounted for 13.4% of the region’s total output with individual contributions of 4.7%, 4.4% and 4.3% respectively. These five countries accounted for 91.0% of the region’s output over the period 2004–2008.

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<td>180,000.0</td>
<td>180,000.0</td>
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*Source: Data generated from Country Statistics. Data in highlights are estimates*

#### 3.2.2.2 Root crop production
Production was estimated at 1,157.4 million kg in 2008 and represented an increase of 14.6% when compared to 1,009.5 million kg in 2004. A review of the data revealed that Haiti and Jamaica accounted for 91.6% of total output over the period 2004–2008 with individual contributions of 75.3% and 16.4% respectively. A further review of the data revealed that Guyana, Dominica and St. Vincent and the Grenadines accounted for 6.2% of the region’s total output with individual contributions of 3.0%, 2.2% and 1.0% respectively. These five countries accounted for 97.8% of the regions output over the period 2004–2008.

### TABLE 3.2.2.02: SUMMARY OF ROOT CROP PRODUCTION BY COUNTRY, 2004 TO 2008

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Source: Data generated from Country Statistics. Data in highlights are estimates

#### 3.2.2.03 Pulses and grains production

Production was estimated at 1,216.5 million kg in 2008 and represented a marginal increase of 0.8% when compared to 1,206.3 million kg in 2004. A review of the data revealed that Guyana and Haiti accounted for 73.3% of total output over the period 2004–2008 with individual contributions of 37.7% and 35.5% respectively. A further review of the data revealed that Suriname and Belize accounted for 25.5% of the region’s total output with individual contributions of 14.5% and 11.0% respectively. These four countries accounted for 98.8% of the regions output over the period 2004–2008.
3.2.2.04 Production of condiments

Production in 2008 was estimated at 37.3 million kg and represented a marginal decrease of 0.3% when compared to 37.2 million kg in 2004. A review of the data revealed that Jamaica accounted for 71.0% of total output over the period 2004–2008. A further review of the data revealed that Guyana and Trinidad and Tobago accounted for 19.4% of the region’s total output with individual contributions of 11.9% and 7.5% respectively. These three countries accounted for 90.4% of the region’s output over the period 2004–2008.

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Growth Rate 2004 – 100

|                 | 100.8 | 98.3 | 94.7 | 118.6 | 100.8 |

Source: Data generated from Country Statistics. Data in highlights are estimates. ... Denotes No Data
3.2.2.05 Production of fruits

Production was estimated at 1,629.4 million kg in 2008 and represented a decrease of 2.6% when compared to 1,586.6 million kg in 2004. A review of the data revealed that Haiti and Jamaica accounted for 75.6% of total output over the period 2004–2008. A further review of the data revealed that Guyana and Suriname and Belize accounted for 15.8% of the region’s total output with individual contributions of 5.8%, 5.1% and 4.8% respectively. These five countries accounted for 91.4% of the region’s output over the period 2004–2008.

3.2.2.06 Production of tree/export crops

Production was estimated at 211.3 million kg in 2008 and represented a decrease of 3.3% when compared to 204.3 million kg in 2004. A review of the data revealed Suriname, St. Lucia and Haiti accounted for 85.6% of total output with individual contributions of 47.0%, 20.1% and 18.5% respectively over the period 2004–2008. A further review of the data revealed that Jamaica and the Bahamas accounted for 12.1% of the region’s total output with individual contributions of 7.9% and 4.2% respectively. These five countries accounted for 97.7% of the region’s output over the period 2004–2008.

3.2.2.07 Poultry production

Production was estimated at 232.4 million kg in 2008 and represented an increase of 6.1% when compared to 219.0 million kg in 2004. A review of the data revealed Jamaica, Trinidad and Tobago and Guyana accounted for 77.9% of total output with individual contributions of 46.0%, 21.6% and 10.3% respectively over the period 2004–2008. A further review of the data revealed that Barbados and the Belize accounted for 12.4% of the region’s total output with individual contributions of 6.4% and 6.0% respectively.

| Name of Country/Region | 2004  | 2005  | 2006  | 2007  | 2008  | Average 2004-2008 | Percentage of Total Output
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Growth Rate 2004 – 100 100.0 81.3 88.3 95.6 96.7

Source: Data generated from Country Statistics. Denotes Data not Available


Page: 184
These five countries accounted for 90.3% of the regions output over the period 2004–2008.

### Table 3.2.2.07: Summary of Poultry Production by Country, 2004 to 2008

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Source: Data generated from Country Statistics. Data in highlights are estimates → Denotes No Data

### 3.2.2.08 Pork production

Production was estimated at 52.1 million kg in 2008 and represented an increase of 4.8% when compared to 49.7 million kg in 2004. A review of the data revealed Haiti and Jamaica accounted for 80.3% of total output with individual contributions of 64.8% and 15.6% respectively over the period 2004–2008. A further review of the data revealed that Trinidad and Tobago, Barbados and Suriname accounted for 14.9% of the region’s total output with individual contributions of 6.8%, 4.9% and 3.2% respectively. These five countries accounted for 95.2% of the regions output over the period 2004–2008.
3.2.2.09 Beef production

Production was estimated at 57.5 million kg in 2008 and represented a decrease of 10.3% when compared to 64.0 million kg in 2004. A review of the data revealed Haiti and Jamaica accounted for 84.2% of total output with individual contributions of 71.2% and 13.0% respectively over the period 2004–2008. A further review of the data revealed that Guyana, Belize and Suriname accounted for 13.4% of the region’s total output with individual contributions of 7.7%, 3.1% and 2.6% respectively. These five countries accounted for 97.6% of the regions output over the period 2004–2008.

### Table 3.2.2.08: Summary of Beef Production by Country, 2004 to 2008

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Source: Data generated from Country Statistics. Data in highlights are estimates. — Denotes No Data


Page: 186
3.2.2.10 Mutton production

Production in this category includes meat of sheep and goats and was estimated at 7.4 million kg in 2008 and represented a marginal increase of 0.8% when compared to 7.3 million kg in 2004. A review of the data revealed Haiti and Jamaica accounted for 89.9% of total output with individual contributions of 80.6% and 9.3% respectively over the period 2004–2008. A further review of the data revealed that Trinidad and Tobago and St. Vincent and the Grenadines accounted for 5.3% of the region’s total output with individual contributions of 4.0% and 1.3% respectively. These four countries accounted for 95.2% of the regions output over the period 2004–2008.

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Source: Data generated from Country Statistics. Data in highlights are estimates. — Denotes No Data

3.2.2.11 Table egg production

Production was estimated at 146.3 million dozens in 2008 and represented a marginal decrease of 1.6% when compared to 148.6 million dozens in 2004. A review of the data revealed Jamaica accounted for 83.6% of total output. A further review of the data revealed that Trinidad and Tobago, the Bahamas and Suriname accounted for 9.9% of the region’s total output with individual contributions of 4.4%, 3.1% and 2.4% respectively. These four countries accounted for 93.5% of the regions output over the period 2004–2008.
3.2.2.12 Milk production

Production was only available for five countries and was estimated at 36.1 million litres in 2008 which represented a decrease of 9.6% when compared to 40.0 million litres in 2004. A review of the data revealed Jamaica accounted for 39.0% of total output. A further review of the data revealed that Trinidad and Tobago, Guyana, Barbados and Belize accounted for 61.0% of the region’s total output with individual contributions of 17.9%, 17.3%, 17.7% and 8.6% respectively. These five countries accounted for 100.0% of the region’s output over the period 2004–2008.
3.2.2.13 Fish production

Production was estimated at 134.1 million kg in 2008 and represented an increase of 19.1% when compared to 112.6 million kg in 2004. A review of the data revealed Guyana, Suriname, Jamaica and Trinidad and Tobago accounted for 83.3% of total output with individual contributions of 40.7%, 18.7%, 12.7% and 11.2% respectively over the period 2004–2008. A further review of the data revealed that Belize and the Bahamas accounted for 8.7% of the region’s total output with individual contributions of 5.1% and 3.6% respectively. These six countries accounted for 92.0% of the region’s output over the period 2004–2008.
3.2.3: Trade flows

This section provides an analysis of the information on imports and exports of food items by each CARICOM member state for the period 2004–2008. The following is a summary of the data highlights as sourced from the trade databases of the Statistical division of the CARICOM secretariat.

3.2.3.01 Total exports: all items

Total exports: all items were valued at EC$64.2 billion (USD23.8 billion) in 2008 and represented a significant increase of 127.8% when compared to EC$28.2 billion (USD10.4 billion) in 2004. An examination of the data revealed that Trinidad and Tobago accounted for 70.3% of the value of exports during the period 2004–2008. This high import value was mainly influenced by the export of petroleum and petroleum products. A further review of the data indicated that Jamaica, Suriname, Guyana and the Bahamas accounted for 23.1% of the total exports with individual contributions of 10.7%, 5.5%, 3.7% and 3.1% respectively. These five countries accounted for 93.4% of the total value of exports over the period 2004–2008.

A further examination of the data revealed the region’s trade deficit was approximately 25.4% relative to the value of total imports. The percentage of the total value of exports relative to total imports average was 74.4% and ranged between 61.3% and 86.8% during the period 2004–2008.
3.2.3.02 Total value of food exports

Total value of food exports was valued at EC$3.4 billion (USD1.3 billion) in 2008 and represented an increase of 14.5% or an annual growth rate of 2.9% when compared to EC$3.0 billion (USD1.1 billion) in 2004. An examination of the data revealed that Guyana, Jamaica, Belize and Trinidad and Tobago accounted for 74.0% of the value of food exports with individual contributions of 24.8%, 19.9%, 15.1% and 14.2% respectively. A further review of the data indicated that the Bahamas, Suriname and Barbados accounted for 16.6% of the region’s total food exports with individual contributions of 7.2%, 5.4% and 4.0% respectively. These seven countries accounted for 90.6% of the total value of food exports during the period 2004–2008.

A further review of the data revealed that food exports was approximately 6.7% of the value of total exports and ranged between 5.3% and 10.5% during the period 2004–2008. A further examination of the data revealed the value of total food exports relative to the value of food imports was estimated 42.4% with a range of 37.8% to 47.8% over the period. Given this statistic, it can clearly be stated that the majority of CARICOM member states are net importers of food. The countries of Guyana and Belize are the only exceptions and are in fact net exporters of food.
3.2.3.03 Trade surplus/deficit relative to food exports and imports

The trade deficit in relation to trade in food commodities revealed that the deficit increased from EC$3.2 billion (USD1.2 billion) in 2004 to EC$5.6 billion (USD2.1 billion) in 2008; a significant increase of 85.1% or approximately 17% per annum. Given this significant increase, there is a need to determine the influencing factors via the construction of reliable volume and price indices. These indicators should be constructed for both import and export commodities which would provide valuable information to determine whether the increases are the result of increased prices and/or increased volumes. In addition, these indicators can also provide valuable indicators with special reference to patterns of trade.
3.2.3.04: Food exports relative to food imports by country

Food exports as a percentage (relative) to food imports revealed that 13 (the majority of the member states) were net importers of food during the period 2004–2008. A further examination of the data was utilised using the calculation of a food exports to food imports coefficient (FEFIC) to measure the ability of a country’s food export earnings to purchase or pay for food imports. An FEFIC coefficient with a value of <100 indicates that the country food import bill would have to be financed from other revenue earning sources. The following is an analysis of the FEFIC by member states during the period 2004–2008.

### Table 3.2.3.04: Food Exports Relative to Food Imports by Country, 2004 to 2008

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Average 2004/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>0.4</td>
<td>0.5</td>
<td>0.4</td>
<td>0.3</td>
<td>0.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Bahamas</td>
<td>22.7</td>
<td>22.7</td>
<td>25.5</td>
<td>21.1</td>
<td>37.0</td>
<td>24.8</td>
</tr>
<tr>
<td>Barbados</td>
<td>25.7</td>
<td>24.6</td>
<td>23.7</td>
<td>23.6</td>
<td>22.8</td>
<td>23.9</td>
</tr>
<tr>
<td>Belize</td>
<td>329.4</td>
<td>291.8</td>
<td>332.9</td>
<td>244.6</td>
<td>210.4</td>
<td>275.5</td>
</tr>
<tr>
<td>Dominica</td>
<td>59.6</td>
<td>50.4</td>
<td>52.4</td>
<td>37.6</td>
<td>39.9</td>
<td>46.8</td>
</tr>
<tr>
<td>Grenada</td>
<td>30.3</td>
<td>35.6</td>
<td>27.1</td>
<td>24.4</td>
<td>25.6</td>
<td>29.9</td>
</tr>
<tr>
<td>Guyana</td>
<td>344.3</td>
<td>288.2</td>
<td>303.4</td>
<td>301.2</td>
<td>193.5</td>
<td>272.7</td>
</tr>
<tr>
<td>Haiti</td>
<td>6.9</td>
<td>6.4</td>
<td>7.6</td>
<td>6.3</td>
<td>6.3</td>
<td>6.5</td>
</tr>
<tr>
<td>Jamaica</td>
<td>47.0</td>
<td>29.8</td>
<td>31.7</td>
<td>32.9</td>
<td>28.8</td>
<td>34.4</td>
</tr>
<tr>
<td>Montserrat</td>
<td>2.0</td>
<td>2.0</td>
<td>2.4</td>
<td>2.6</td>
<td>2.0</td>
<td>2.2</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>21.5</td>
<td>19.4</td>
<td>20.3</td>
<td>15.5</td>
<td>22.4</td>
<td>19.9</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>40.5</td>
<td>8.8</td>
<td>12</td>
<td>1.5</td>
<td>1.5</td>
<td>7.4</td>
</tr>
<tr>
<td>St. Vincent &amp; Gr‘dines</td>
<td>64.9</td>
<td>64.1</td>
<td>59.6</td>
<td>49.0</td>
<td>40.8</td>
<td>53.6</td>
</tr>
<tr>
<td>Suriname</td>
<td>68.1</td>
<td>51.8</td>
<td>58.2</td>
<td>54.7</td>
<td>79.9</td>
<td>62.9</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>38.6</td>
<td>35.9</td>
<td>40.2</td>
<td>32.9</td>
<td>27.9</td>
<td>33.9</td>
</tr>
<tr>
<td>Total CARICOM Countries</td>
<td>47.7</td>
<td>42.6</td>
<td>45.3</td>
<td>40.2</td>
<td>37.8</td>
<td>42.4</td>
</tr>
</tbody>
</table>

Source: Generated from Country Trade Statistics: Statistical Division : Caricom Secretariat

Three countries, namely Haiti, St. Kitts/Nevis and Antigua & Barbuda, had a FEFIC under ten ranging between 0.4 and 7.4.

Four countries, namely Bahamas, Barbados, St. Lucia and Montserrat, had a FEFIC between 10 and 25 with a range of 12.7 and 24.8.

Four countries, namely Dominica, Grenada, Jamaica and Trinidad and Tobago, had a FEFIC between 25 and 50, with a range of 29.0 and 46.8.

Two countries, namely St. Vincent and the Grenadines and Suriname, had a FEFIC between 50 and 10, with a range of 53.6 and 62.0.

Two countries, namely Guyana and Belize, had a FEFIC over 100, calculated at 272.7 and 275.5 respectively.

### 3.2.3.05 Food exports relative to the value of total exports

The data in this table utilises the indicator food exports relative to the value of total exports (FETEC) to measure the significance of food export earnings as a percentage of total export earnings. The following is a summary of the FETEC coefficients by member states.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua and Barbuda</td>
<td>12.8</td>
<td>13.9</td>
<td>8.2</td>
<td>6.3</td>
<td>8.3</td>
<td>8.9</td>
</tr>
<tr>
<td>Bahamas</td>
<td>19.6</td>
<td>18.4</td>
<td>17.4</td>
<td>12.7</td>
<td>12.0</td>
<td>15.3</td>
</tr>
<tr>
<td>Barbados</td>
<td>28.2</td>
<td>26.5</td>
<td>24.8</td>
<td>16.0</td>
<td>24.2</td>
<td>19.9</td>
</tr>
<tr>
<td>Belize</td>
<td>87.9</td>
<td>87.2</td>
<td>73.7</td>
<td>65.0</td>
<td>67.3</td>
<td>72.7</td>
</tr>
<tr>
<td>Dominica</td>
<td>30.2</td>
<td>33.7</td>
<td>33.5</td>
<td>32.9</td>
<td>35.8</td>
<td>35.0</td>
</tr>
<tr>
<td>Grenada</td>
<td>80.7</td>
<td>81.4</td>
<td>71.6</td>
<td>72.9</td>
<td>74.3</td>
<td>74.0</td>
</tr>
<tr>
<td>Guyana</td>
<td>44.1</td>
<td>52.4</td>
<td>42.4</td>
<td>51.3</td>
<td>37.2</td>
<td>44.9</td>
</tr>
<tr>
<td>Haiti</td>
<td>5.7</td>
<td>5.1</td>
<td>5.5</td>
<td>6.4</td>
<td>7.6</td>
<td>6.0</td>
</tr>
<tr>
<td>Jamaica</td>
<td>18.1</td>
<td>12.6</td>
<td>12.2</td>
<td>11.1</td>
<td>18.7</td>
<td>12.8</td>
</tr>
<tr>
<td>Montserrat</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>49.7</td>
<td>0.3</td>
<td>49.5</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>57.1</td>
<td>56.8</td>
<td>54.7</td>
<td>47.4</td>
<td>50.7</td>
<td>54.7</td>
</tr>
<tr>
<td>St. Kitts &amp; Nevis</td>
<td>26.8</td>
<td>26.5</td>
<td>18.9</td>
<td>12.7</td>
<td>11.1</td>
<td>15.5</td>
</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>33.5</td>
<td>34.4</td>
<td>38.8</td>
<td>41.2</td>
<td>38.2</td>
<td>38.6</td>
</tr>
<tr>
<td>Suriname</td>
<td>7.8</td>
<td>4.7</td>
<td>5.6</td>
<td>5.9</td>
<td>4.9</td>
<td>6.0</td>
</tr>
<tr>
<td>Trinidad and Tobago</td>
<td>21.3</td>
<td>17.1</td>
<td>13.3</td>
<td>14.4</td>
<td>13.0</td>
<td>14.2</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>49.5</td>
<td>55.6</td>
<td>59.0</td>
<td>56.4</td>
<td>53.3</td>
<td>56.2</td>
</tr>
</tbody>
</table>

Source: Generated from Country Trade Statistics: Statistical Division: Caricom Secretariat

Five countries, namely Antigua/Barbuda, Haiti, St. Kitts/Nevis, Suriname and Trinidad and Tobago, FETEC were <10 and ranged between 1.4 and 8.9.

Three countries namely Bahamas, Barbados and Jamaica FETEC were between 10 but <25 with a range of 12.5 and 19.0.

Three countries namely Dominica, Guyana and Montserrat FETEC were between 25 but <50 with a range of 35.0 and 49.5.

Four countries namely St. Vincent and the Grenadines, St. Lucia, Grenada and Belize FETEC were between 50 but <100 with a range of 54.7 and 81.5.

### 3.2.3.06 Food exports relative to the value of total imports

The data included in this table was derived by combining the trade data to provide an economic indicator to measure the relationship between the value of food exports and total imports. This indicator is referred to as the ratio of food exports relative to the value.
of total imports (FETIC). The FETIC for all member states is estimated at five which indicates that earnings from food exports could only purchase or finance only 5% of the total import bill during the period 2004–2008. The following is a summary of the FETEC coefficients by member states.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Average 2004/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>0.1</td>
<td>0.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.1</td>
<td>0.1</td>
</tr>
<tr>
<td>Bahamas</td>
<td>4.9</td>
<td>3.1</td>
<td>3.2</td>
<td>2.7</td>
<td>2.6</td>
<td>3.0</td>
</tr>
<tr>
<td>Barbados</td>
<td>3.1</td>
<td>2.8</td>
<td>2.7</td>
<td>3.7</td>
<td>3.2</td>
<td>3.1</td>
</tr>
<tr>
<td>Belize</td>
<td>47.5</td>
<td>49.1</td>
<td>29.9</td>
<td>24.2</td>
<td>29.2</td>
<td>29.6</td>
</tr>
<tr>
<td>Dominica</td>
<td>9.9</td>
<td>8.0</td>
<td>8.1</td>
<td>6.0</td>
<td>6.4</td>
<td>7.5</td>
</tr>
<tr>
<td>Grenada</td>
<td>7.8</td>
<td>5.9</td>
<td>4.4</td>
<td>3.9</td>
<td>4.5</td>
<td>5.0</td>
</tr>
<tr>
<td>Guyana</td>
<td>37.6</td>
<td>34.8</td>
<td>31.2</td>
<td>34.2</td>
<td>21.7</td>
<td>30.5</td>
</tr>
<tr>
<td>Haiti</td>
<td>1.7</td>
<td>1.7</td>
<td>1.7</td>
<td>2.9</td>
<td>1.4</td>
<td>1.7</td>
</tr>
<tr>
<td>Jamaica</td>
<td>6.5</td>
<td>3.8</td>
<td>4.7</td>
<td>3.6</td>
<td>3.9</td>
<td>4.0</td>
</tr>
<tr>
<td>Montserrat</td>
<td>0.3</td>
<td>0.0</td>
<td>0.3</td>
<td>3.3</td>
<td>3.6</td>
<td>1.6</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>12.3</td>
<td>8.1</td>
<td>7.7</td>
<td>6.5</td>
<td>7.5</td>
<td>7.9</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>2.2</td>
<td>0.1</td>
<td>0.1</td>
<td>0.1</td>
<td>0.1</td>
<td>0.5</td>
</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>12.3</td>
<td>11.8</td>
<td>10.2</td>
<td>9.0</td>
<td>8.0</td>
<td>10.0</td>
</tr>
<tr>
<td>Suriname</td>
<td>7.3</td>
<td>4.6</td>
<td>5.8</td>
<td>5.7</td>
<td>9.7</td>
<td>6.4</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>2.8</td>
<td>2.7</td>
<td>2.7</td>
<td>2.3</td>
<td>1.9</td>
<td>2.4</td>
</tr>
<tr>
<td>Total Caribbean Countries</td>
<td>6.5</td>
<td>5.2</td>
<td>5.2</td>
<td>4.0</td>
<td>4.1</td>
<td>5.0</td>
</tr>
</tbody>
</table>

In eight countries the FETIC are below 5.0 which means that these economies have to source more than 95% of the total import bill from other sources. These countries are Antigua/Barbuda, Bahamas, Barbados, Haiti, Jamaica, Montserrat, St. Kitts/Nevis and Trinidad and Tobago. The FETIC for these named countries range between 0.1 and 4.0.

In four countries the FETIC range between 5.0 and 8.0 which means that these economies have to obtain between 92–95% of the total import bill from other financial sources. These countries are Dominica, Grenada, St. Lucia and Suriname.

In three countries, namely St. Vincent and the Grenadines, Belize and Guyana, the FETIC are estimated at 10.0, 29.6 and 30.5 respectively. These countries are in a better position as the financing of the import bill would be spread to other sectors of the domestic economy.

3.2.3.07 Total imports: all items

Total imports: all items were valued at EC$83.9 billion (USD31.1 billion) in 2008 and represented a significant increase of 82.4% when compared to EC$46.0 billion (USD17.0 billion) in 2004. An examination of the data revealed that Trinidad and Tobago, Jamaica and the Bahamas accounted for 66.1% of the value of total imports in the region during the period 2004–2008. The respective contribution from these countries was 29.6%, 24.7% and 11.8% each. A further review of the data indicated that Haiti, Barbados and Suriname accounted for 18.0% of the total imports with individual contributions of 7.2%, 6.6% and 4.2% respectively. These six countries accounted for 84.1% of the total value of imports during the period 2004–2008.
A further examination of the data revealed the region’s food import bill was approximately 34.3% in excess of the value of total exports. The percentage of the total value of imports relative to total exports was estimated at 134.3% and ranged between 115.3% and 163.1% during the period 2004–2008.

### TABLE 3.2.3.08: TOTAL VALUE OF IMPORTS (ALL ITEMS) BY COUNTRY, 2004 TO 2008

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>1,074.2</td>
<td>1,418.1</td>
<td>1,811.1</td>
<td>1,567.3</td>
<td>1,567.3</td>
<td>1,479.6</td>
<td>2.3</td>
</tr>
<tr>
<td>Bahamas</td>
<td>5,336.6</td>
<td>6,931.3</td>
<td>8,047.9</td>
<td>8,390.3</td>
<td>8,543.9</td>
<td>7,467.8</td>
<td>11.8</td>
</tr>
<tr>
<td>Barbados</td>
<td>3,914.9</td>
<td>4,392.8</td>
<td>4,398.4</td>
<td>3,588.2</td>
<td>4,716.5</td>
<td>4,163.8</td>
<td>6.6</td>
</tr>
<tr>
<td>Belize</td>
<td>1,022.5</td>
<td>1,184.2</td>
<td>1,782.5</td>
<td>1,847.1</td>
<td>2,260.8</td>
<td>1,619.7</td>
<td>2.6</td>
</tr>
<tr>
<td>Dominica</td>
<td>390.8</td>
<td>446.4</td>
<td>450.6</td>
<td>528.5</td>
<td>627.4</td>
<td>465.7</td>
<td>0.8</td>
</tr>
<tr>
<td>Grenada</td>
<td>681.8</td>
<td>901.9</td>
<td>867.1</td>
<td>905.8</td>
<td>1,018.5</td>
<td>879.0</td>
<td>1.4</td>
</tr>
<tr>
<td>Guyana</td>
<td>1,707.0</td>
<td>2,210.6</td>
<td>2,382.3</td>
<td>2,717.8</td>
<td>3,824.8</td>
<td>2,580.3</td>
<td>4.1</td>
</tr>
<tr>
<td>Haiti</td>
<td>3,526.2</td>
<td>3,925.8</td>
<td>4,433.4</td>
<td>4,541.4</td>
<td>4,625.5</td>
<td>4,536.7</td>
<td>7.2</td>
</tr>
<tr>
<td>Jamaica</td>
<td>10,307.4</td>
<td>13,184.3</td>
<td>13,616.1</td>
<td>16,225.9</td>
<td>22,885.2</td>
<td>15,643.7</td>
<td>24.7</td>
</tr>
<tr>
<td>Montserrat</td>
<td>77.6</td>
<td>80.4</td>
<td>81.5</td>
<td>78.8</td>
<td>102.8</td>
<td>84.4</td>
<td>0.1</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>492.7</td>
<td>568.3</td>
<td>673.7</td>
<td>787.3</td>
<td>877.0</td>
<td>689.8</td>
<td>1.1</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>1,488.8</td>
<td>1,311.6</td>
<td>1,586.9</td>
<td>1,063.1</td>
<td>1,770.1</td>
<td>1,567.7</td>
<td>2.5</td>
</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>608.5</td>
<td>649.4</td>
<td>733.0</td>
<td>882.3</td>
<td>1,007.5</td>
<td>776.2</td>
<td>1.2</td>
</tr>
<tr>
<td>Suriname</td>
<td>2,005.5</td>
<td>3,210.0</td>
<td>2,724.0</td>
<td>3,200.4</td>
<td>2,321.0</td>
<td>2,642.3</td>
<td>4.2</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>13,437.6</td>
<td>15,586.0</td>
<td>17,765.3</td>
<td>20,916.0</td>
<td>25,999.2</td>
<td>18,740.8</td>
<td>20.6</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>45,972.1</td>
<td>55,940.2</td>
<td>61,386.3</td>
<td>65,821.9</td>
<td>83,822.0</td>
<td>63,388.5</td>
<td>100.0</td>
</tr>
<tr>
<td>Growth Rate 2004 = 100</td>
<td>100.0</td>
<td>121.7</td>
<td>132.4</td>
<td>161.9</td>
<td>182.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of Imports to Exports</td>
<td>163.1</td>
<td>146.2</td>
<td>115.2</td>
<td>134.1</td>
<td>139.5</td>
<td>134.3</td>
<td></td>
</tr>
</tbody>
</table>

Source: Generated from: Trade Statistics: Statistical Division : Caricom Secretariat

### 3.2.3.08 Total value of food imports

Total value of food imports were valued at EC$9.0 billion (USD3.3 billion) in 2008 and represented a significant increase of 44.7% or annual growth rate of 8.8% when compared to EC$6.2 billion (USD2.3 billion) in 2004. An examination of the data revealed that Jamaica, Trinidad and Tobago, Haiti and the Bahamas accounted for 70.2% of the value of food imports with individual contributions of 24.5%, 17.8%, 15.7% and 12.2% respectively during the period 2004–2008. A further review of the data indicated that Barbados, Guyana, Suriname and St. Lucia accounted for 18.2% of the region’s total food imports with individual contributions of 7.1%, 3.8%, 3.7% and 3.6% respectively. These eight countries accounted for 88.4% of the total value of food imports over the period 2004–2008.

A further review of the data revealed that food imports was approximately 11.8% of the value of total imports and ranged between 10.7% and 13.5% during the period 2004–2008. A further examination of the data revealed the value of total food imports relative to total value of exports was estimated at 15.9% with a range of 13.1% to 22.1% over the period. Given this statistic, it can clearly be stated that the majority of CARICOM member states are net importers of food. The countries of Guyana and Belize are the only exceptions and are net exporters of food.
3.2.3.09 Food imports relative to the value of total imports

The data in this table utilises the indicator food imports relative to the value of total imports (FITIC) to measure the significance of the food import bill as a percentage of total import bill. The average FITIC coefficient for all member states was estimated at 11.8% with a range 10.7% to 13.5% over the period 2004–2008. The following is a summary of the FITIC coefficients by member states:
Two countries namely St. Kitts/Nevis and Trinidad and Tobago FITIC were <10 and ranged between 6.6 and 7.1.

Eleven (11) countries FITIC range between 10.3 but <18.6. These countries are Antigua/Barbuda, the Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Vincent and the Grenadines and Suriname.

Two countries namely Haiti and St. Lucia FITIC are calculated at 25.9 and 39.7 respectively.

3.2.3.10 Food exports relative to gross domestic product

The data presented in this table utilises the indicator food exports relative to the gross domestic product (FERGDP) to measure the significance of the food export earnings as a percentage of total gross domestic product. The average FERGDP coefficient for all member states was estimated at 2.73% over the period 2004–2008. The following is a summary of the FERGDP coefficients by member states.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Average 2004/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>17.6</td>
<td>13.3</td>
<td>11.3</td>
<td>15.0</td>
<td>15.0</td>
<td>14.1</td>
</tr>
<tr>
<td>Bahamas</td>
<td>17.5</td>
<td>13.5</td>
<td>12.5</td>
<td>13.0</td>
<td>7.0</td>
<td>12.2</td>
</tr>
<tr>
<td>Barbados</td>
<td>12.0</td>
<td>11.5</td>
<td>11.5</td>
<td>15.6</td>
<td>14.0</td>
<td>12.9</td>
</tr>
<tr>
<td>Belize</td>
<td>14.4</td>
<td>13.8</td>
<td>9.0</td>
<td>9.9</td>
<td>9.6</td>
<td>10.7</td>
</tr>
<tr>
<td>Dominica</td>
<td>16.6</td>
<td>15.8</td>
<td>15.5</td>
<td>16.0</td>
<td>16.0</td>
<td>16.0</td>
</tr>
<tr>
<td>Grenada</td>
<td>19.8</td>
<td>14.2</td>
<td>16.1</td>
<td>15.8</td>
<td>17.7</td>
<td>16.6</td>
</tr>
<tr>
<td>Guyana</td>
<td>10.9</td>
<td>12.1</td>
<td>10.3</td>
<td>11.3</td>
<td>11.2</td>
<td>11.2</td>
</tr>
<tr>
<td>Haiti</td>
<td>28.6</td>
<td>25.8</td>
<td>22.7</td>
<td>31.4</td>
<td>22.8</td>
<td>25.9</td>
</tr>
<tr>
<td>Jamaica</td>
<td>13.8</td>
<td>12.6</td>
<td>12.5</td>
<td>10.8</td>
<td>10.5</td>
<td>11.7</td>
</tr>
<tr>
<td>Montserrat</td>
<td>11.7</td>
<td>12.0</td>
<td>12.5</td>
<td>12.6</td>
<td>11.7</td>
<td>12.2</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>57.3</td>
<td>41.6</td>
<td>38.0</td>
<td>35.6</td>
<td>33.5</td>
<td>39.7</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>5.5</td>
<td>6.6</td>
<td>6.5</td>
<td>6.9</td>
<td>7.5</td>
<td>6.6</td>
</tr>
<tr>
<td>St. Vincent &amp; Gr’dines</td>
<td>18.9</td>
<td>18.4</td>
<td>17.1</td>
<td>18.5</td>
<td>19.7</td>
<td>18.6</td>
</tr>
<tr>
<td>Suriname</td>
<td>10.7</td>
<td>8.9</td>
<td>10.0</td>
<td>10.5</td>
<td>12.1</td>
<td>10.3</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>7.2</td>
<td>7.6</td>
<td>6.7</td>
<td>7.0</td>
<td>7.0</td>
<td>7.1</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>13.5</td>
<td>12.3</td>
<td>11.4</td>
<td>12.0</td>
<td>10.7</td>
<td>11.8</td>
</tr>
</tbody>
</table>

Source: Generated from Country Trade Statistics Statistical Division : Caricom Secretariat

- Two countries namely St. Kitts/Nevis and Trinidad and Tobago FITIC were <10 and ranged between 6.6 and 7.1.
- Eleven (11) countries FITIC range between 10.3 but <18.6. These countries are Antigua/Barbuda, the Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Vincent and the Grenadines and Suriname.
- Two countries namely Haiti and St. Lucia FITIC are calculated at 25.9 and 39.7 respectively.
In eight countries FERGDP were <3% of the GDP and ranged between 0.5% and 2.9%. These countries were Antigua/Barbuda, the Bahamas, Barbados, Haiti, Jamaica, St. Kitts/Nevis, Montserrat and Trinidad and Tobago.

In five countries FERGDP range between 5.8% but <8.2% of the GDP. These countries were: Dominica, Grenada, St. Vincent and the Grenadines, Suriname and St. Lucia.

In two countries, namely Guyana and Belize, FERGDP were calculated at 38.1% and 19.1% of the GDP respectively.

### 3.2.3.11 Food Imports relative to gross domestic product

The data presented in this table utilises the indicator food imports relative to the gross domestic product (FIRGDP) to measure the significance of the food export earnings as a percentage of total gross domestic product. The average FIRGDP coefficient for all member states was estimated at 6.4% over the period 2004–2008. The following is a summary of the FERGDP coefficients by member states.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>0.05</td>
<td>0.05</td>
<td>0.04</td>
<td>0.03</td>
<td>0.04</td>
</tr>
<tr>
<td>Bahamas</td>
<td>1.24</td>
<td>1.20</td>
<td>1.36</td>
<td>1.20</td>
<td>1.17</td>
</tr>
<tr>
<td>Barbados</td>
<td>1.97</td>
<td>1.97</td>
<td>1.95</td>
<td>1.99</td>
<td>2.33</td>
</tr>
<tr>
<td>Belize</td>
<td>19.88</td>
<td>18.75</td>
<td>20.22</td>
<td>17.02</td>
<td>17.34</td>
</tr>
<tr>
<td>Dominica</td>
<td>6.61</td>
<td>5.99</td>
<td>5.80</td>
<td>4.91</td>
<td>5.99</td>
</tr>
<tr>
<td>Grenada</td>
<td>5.56</td>
<td>4.29</td>
<td>3.41</td>
<td>3.50</td>
<td>4.14</td>
</tr>
<tr>
<td>Guyana</td>
<td>38.09</td>
<td>46.56</td>
<td>42.79</td>
<td>51.92</td>
<td>43.97</td>
</tr>
<tr>
<td>Haiti</td>
<td>0.38</td>
<td>0.39</td>
<td>0.42</td>
<td>0.49</td>
<td>0.48</td>
</tr>
<tr>
<td>Jamaica</td>
<td>2.94</td>
<td>2.18</td>
<td>2.71</td>
<td>2.71</td>
<td>2.89</td>
</tr>
<tr>
<td>Montserrat</td>
<td>-</td>
<td>-</td>
<td>0.32</td>
<td>3.23</td>
<td>4.29</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>7.39</td>
<td>7.30</td>
<td>7.83</td>
<td>4.39</td>
<td>6.80</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>1.95</td>
<td>0.04</td>
<td>0.07</td>
<td>0.09</td>
<td>0.11</td>
</tr>
<tr>
<td>St. Vincent &amp; Gr‘dines</td>
<td>8.66</td>
<td>8.64</td>
<td>7.83</td>
<td>7.75</td>
<td>7.92</td>
</tr>
<tr>
<td>Suriname</td>
<td>5.02</td>
<td>5.71</td>
<td>5.82</td>
<td>6.39</td>
<td>7.85</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>1.22</td>
<td>1.30</td>
<td>1.30</td>
<td>1.25</td>
<td>1.25</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>2.80</td>
<td>2.65</td>
<td>2.71</td>
<td>2.75</td>
<td>2.76</td>
</tr>
</tbody>
</table>

Source: Compiled from data supplied by the Statistical Division, Caricom Secretariat.
Seven countries FIRGDP were <10% of the GDP and ranged between 5.0% and 8.4%. These countries were the Bahamas, Barbados, Belize, Haiti, Jamaica and St. Kitts/Nevis.

Seven countries FIRGDP range between 10.2–15.0% of the GDP. These countries were Antigua/Bermuda, Dominica, Grenada, Guyana, Montserrat, St. Vincent and the Grenadines and Suriname.

St. Lucia FIRGDP average for the period 2004–2008 was calculated at 29.8% with a range of 27.3–34.3%.

Trinidad and Tobago FIRGDP average for the period 2004–2008 was calculated at 3.7% with a range of 3.2% to 4.6%. This low FIRGDP was basically due to the significance of the contribution by the Energy Sector in the compilation of the GDP estimates for Trinidad and Tobago.

Two (2) countries namely Guyana and Belize FERGDP were calculated at 22.7% and 8.2% of the GDP respectively.

3.2.3.12 Gross domestic product, 2006 (200 constant prices)

The data presented in this table is computed to illustrate the relative contribution of agriculture as a percentage of the Gross Domestic Product for the period 2006. An initial review of the information indicates that the region’s agricultural contribution to the GDP was estimated at 3.6% in 2006. The following is a summary of the findings which is highly correlated to the Food Export to GDP (FERGDP) as highlighted in 3.2.3.10 above.
Six countries’ agricultural contribution to GDP in 2006 was <5% and ranged between 1.3% and 3.3%. These countries were Antigua/Bermuda, the Bahamas, Barbados, Montserrat, St. Kitts/Nevis and St. Lucia.

Four countries’ agricultural contribution to GDP in 2006 was between 5.6% and 9.9%. These countries were Grenada, Jamaica, St. Vincent and the Grenadines and Suriname.

Guyana Agricultural contribution to the GDP was significant and was computed at 29.6% as compared to 0.4% for Trinidad and Tobago. This latter figure for Trinidad and Tobago is directly correlated to the significance of the petroleum sector in the compilation of the GDP for Trinidad and Tobago.

### 3.2.4 Statistical review of data inputs as utilised at the regional level in the construction of crude food balance sheet

This section summarises the available data inputs as utilised in the construction of crude food balance sheets by member states. The information is structured in three tiers namely, domestic production, exports and imports for the 35 agricultural enterprises as enunciated by the various stakeholders within the CARICOM region. In addition, three coefficients were computed to aid in the analysis and interpretation of the data sets with special reference to the objectives of this project. The coefficients computed were as follows:

- Percentage of Imports to Domestic Production (PIDP)
- Percentage of Exports to Domestic Production (PEDP)
- Percentage of Production to Domestic Supply (PPDS)
3.2.4.01 Imports of meat and fish fresh/chilled/frozen, 2008

The total quantity of meat imports in 2008 as recorded in the trade statistics was 146.6 million kg of which poultry accounted for 71.3% of total quantity imported. The imports of beef, pork and mutton (inclusive of goat meat) were 28.7% of the meat imports with individual contributions of 12.0%, 7.3% and 9.4% respectively.

A further review of the data revealed that Jamaica, the Bahamas, Trinidad and Tobago and Haiti accounted for 72.4% of total meat imports with contributions of 27.9%, 20.5%, 14.8% and 9.2% respectively. A closer examination of the data indicated that Antigua/Bermuda, St. Vincent and the Grenadines and Grenada accounted for 14.7% of imports with import intakes of 5.5%, 5.1% and 4.1% each, these seven (7) countries accounted for 87.1% of meat imports in 2008.

The total quantity of fish imports in 2008 as recorded in the trade statistics was 21.5 million kg and represented 24.3% of the total quantity of fish exports in the same period.

A further review of the data revealed that Jamaica, Barbados and Trinidad and Tobago accounted for 83.5% of total fish imports with contributions of 45.5%, 26.9% and 11.1% respectively.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Total Meat</th>
<th>Poultry</th>
<th>Beef</th>
<th>Pork</th>
<th>Mutton</th>
<th>Fish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>8,625.7</td>
<td>6,678.5</td>
<td>798.8</td>
<td>450.4</td>
<td>181.0</td>
<td>761.2</td>
</tr>
<tr>
<td>Bahamas</td>
<td>29,988.7</td>
<td>17,167.8</td>
<td>6,894.6</td>
<td>3,352.1</td>
<td>1,942</td>
<td>966.4</td>
</tr>
<tr>
<td>Barbados</td>
<td>4,399.8</td>
<td>353.9</td>
<td>1,883.6</td>
<td>521.7</td>
<td>1,636.6</td>
<td>5,793.3</td>
</tr>
<tr>
<td>Belize</td>
<td>263.3</td>
<td>19.9</td>
<td>0.0</td>
<td>0.0</td>
<td>6.4</td>
<td>83.0</td>
</tr>
<tr>
<td>Dominica</td>
<td>3,443.4</td>
<td>3,231.6</td>
<td>82.8</td>
<td>95.3</td>
<td>33.7</td>
<td>87.0</td>
</tr>
<tr>
<td>Grenada</td>
<td>6,019.1</td>
<td>5,501.4</td>
<td>239.4</td>
<td>236.1</td>
<td>40.2</td>
<td>725.4</td>
</tr>
<tr>
<td>Guyana</td>
<td>1,536.5</td>
<td>131.2</td>
<td>12.8</td>
<td>4.7</td>
<td>4.9</td>
<td>92.0</td>
</tr>
<tr>
<td>Haiti</td>
<td>13,486.0</td>
<td>13,428.0</td>
<td>--</td>
<td>--</td>
<td>58.0</td>
<td>--</td>
</tr>
<tr>
<td>Jamaica</td>
<td>40,860.1</td>
<td>32,239.2</td>
<td>2,421.2</td>
<td>--</td>
<td>6,219.7</td>
<td>5,791.2</td>
</tr>
<tr>
<td>Montserrat</td>
<td>314.9</td>
<td>233.9</td>
<td>3.3</td>
<td>27.0</td>
<td>0.7</td>
<td>16.8</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>2,720.5</td>
<td>247.1</td>
<td>1,229.4</td>
<td>476.1</td>
<td>767.9</td>
<td>674.6</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>384.7</td>
<td>3,494.0</td>
<td>102.3</td>
<td>221.3</td>
<td>141.7</td>
<td>461.5</td>
</tr>
<tr>
<td>St. Vincent &amp; Gren.</td>
<td>7,542.0</td>
<td>6,723.8</td>
<td>344.1</td>
<td>422.9</td>
<td>512.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Suriname</td>
<td>4,272.5</td>
<td>3,993.9</td>
<td>23.6</td>
<td>15.7</td>
<td>18.5</td>
<td>4.7</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>21,655.4</td>
<td>11,147.4</td>
<td>3,635.8</td>
<td>4,239.7</td>
<td>2,632.5</td>
<td>2,395.3</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>146,567.7</td>
<td>108,537.4</td>
<td>17,942.7</td>
<td>10,671.0</td>
<td>13,716.6</td>
<td>24,572.6</td>
</tr>
<tr>
<td>% Distribution of Meat</td>
<td>100.0</td>
<td>74.3</td>
<td>12.0</td>
<td>7.3</td>
<td>9.4</td>
<td></td>
</tr>
</tbody>
</table>

Source: Data generated from Country Statistics

Denotes No Data Available
3.2.4.02 Exports of meat and fish fresh/chilled/frozen, 2008

The total quantity of meat exports in 2008 as recorded in the trade statistics was 4.1 million kg of which poultry accounted for 97.9% of the total quantity imported. The imports of beef, pork and mutton (inclusive of goat meat) were 2.1% of the meat imports with individual contributions of 1.3%, 0.7% and 0.1% respectively. Total meat exports were computed at 2.8% of total meat imports in 2008.

A further review of the data revealed that Suriname accounted for 82.9% of total meat exports of which 99.7% was classified as poultry. A closer examination of the data indicated that Trinidad and Tobago, Barbados and Jamaica accounted for 16.7% of imports with contributions of 6.7%, 6.3% and 3.7% each. An examination of the data for these countries indicated that poultry constituted more than 95.0% of meat exports. These four countries accounted for 99.6% of meat exports in 2008.

The total quantity fish exports in 2008 as recorded in the trade statistics were 88.5 million kg. A further review of the data revealed that Guyana accounted for 68.9% of total fish exports whereas Suriname, Trinidad and Tobago and the Bahamas accounted for 29.7% with contributions of 23.6%, 3.2% and 2.9% respectively.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Total Meat</th>
<th>Poultry</th>
<th>Beef</th>
<th>Pork</th>
<th>Mutton</th>
<th>Fish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>0.3</td>
<td>0.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.1</td>
<td>37.7</td>
</tr>
<tr>
<td>Bahamas</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>2,537.7</td>
</tr>
<tr>
<td>Barbados</td>
<td>255.8</td>
<td>255.8</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>168.0</td>
</tr>
<tr>
<td>Belize</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Dominica</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>1.4</td>
</tr>
<tr>
<td>Grenada</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>537.5</td>
</tr>
<tr>
<td>Guyana</td>
<td>15.9</td>
<td>0.1</td>
<td>10.9</td>
<td>0.0</td>
<td>4.9</td>
<td>61,000.0</td>
</tr>
<tr>
<td>Haiti</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Jamaica</td>
<td>162.1</td>
<td>151.8</td>
<td>0.0</td>
<td>0.0</td>
<td>0.3</td>
<td>418.5</td>
</tr>
<tr>
<td>Montserrat</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>1.5</td>
<td>1.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>0.0</td>
<td>0.0</td>
<td>0.5</td>
<td>0.5</td>
<td>0.4</td>
<td>101.2</td>
</tr>
<tr>
<td>St. Vincent &amp; Gr’nees</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Suriname</td>
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<td>3,367.4</td>
<td>11.1</td>
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<td>20,877.0</td>
<td></td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>211.2</td>
<td>213.2</td>
<td>30.9</td>
<td>27.0</td>
<td>0.1</td>
<td>2,829.7</td>
</tr>
<tr>
<td>Total Caricom Countries</td>
<td>4,076.2</td>
<td>3,590.8</td>
<td>53.4</td>
<td>27.0</td>
<td>5.8</td>
<td>88,518.7</td>
</tr>
<tr>
<td>% Distribution of Meat</td>
<td>100.0</td>
<td>97.9</td>
<td>1.3</td>
<td>0.7</td>
<td>0.1</td>
<td>45.4</td>
</tr>
</tbody>
</table>

Source: Data generated from Country Statistics. — Denotes No Data Available

3.2.4.03 Domestic production of meat and fish fresh/chilled/frozen

The total quantity of domestic meat production in 2008 was estimated at 491.9 million kg of which poultry accounted for 66.5% of the total meat output. A further evaluation of the data revealed that beef, pork and mutton (inclusive of goat meat) was 23.5% of the meat output with individual contributions of 16.5%, 14.9% and 2.1% respectively.

A further review of the data revealed that Jamaica, Haiti and Trinidad and Tobago accounted for 76.3% of total output with contributions of 35.1%, 25.5% and 15.7% respectively. A closer examination of the data indicated that Barbados, Belize and Suriname accounted for 12.9% of total output with contributions of 5.0%, 4.4% and 3.5% each. These six countries accounted for 89.2% of total meat output.

The total quantity of domestic fish production in 2008 was estimated at 134.1 million kg of which Guyana, Suriname, Jamaica and Trinidad and Tobago accounted for 85.1% of the total fish output with contributions of 45.5%, 17.5%, 11.8% and 10.3% each. A further evaluation of the data revealed that the Bahamas, Belize, Antigua/Barbuda and Barbados produced 11.1% of the regional fish output with contributions of 3.4%, 3.1%, 2.6% and 2.0% respectively. These eight counties accounted for 96.2% of the region’s fish production.

### Table 3.2.4.03: Domestic Production of Meat and Fish Fresh/Chilled/Frozen

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Total Meat</th>
<th>Poultry</th>
<th>Beef</th>
<th>Pork</th>
<th>Mutton</th>
<th>Fish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua and Barbuda</td>
<td>514.4</td>
<td>228.6</td>
<td>124.9</td>
<td>130.5</td>
<td>30.4</td>
<td>3,521.0</td>
</tr>
<tr>
<td>Bahamas</td>
<td>4,747.4</td>
<td>4,665.8</td>
<td>8.4</td>
<td>114.8</td>
<td>68.8</td>
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<td>Barbados</td>
<td>17,502.0</td>
<td>14,627.4</td>
<td>152.7</td>
<td>2,936.8</td>
<td>85.1</td>
<td>2,711.5</td>
</tr>
<tr>
<td>Belize</td>
<td>15,407.5</td>
<td>12,555.2</td>
<td>1,714.8</td>
<td>1,067.0</td>
<td>30.5</td>
<td>4,150.0</td>
</tr>
<tr>
<td>Dominican</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Grenada</td>
<td>895.7</td>
<td>632.9</td>
<td>170.3</td>
<td>66.7</td>
<td>25.8</td>
<td>2,376.5</td>
</tr>
<tr>
<td>Guyana</td>
<td>26,824.8</td>
<td>23,487.2</td>
<td>4,957.1</td>
<td>581.4</td>
<td>99.1</td>
<td>61,000.0</td>
</tr>
<tr>
<td>Haiti</td>
<td>8,391.0</td>
<td>7,981.0</td>
<td>42,000.0</td>
<td>3,000.0</td>
<td>6,000.0</td>
<td></td>
</tr>
<tr>
<td>Jamaica</td>
<td>127,559.9</td>
<td>106,741.1</td>
<td>5,933.9</td>
<td>9,138.2</td>
<td>767.2</td>
<td>15,825.0</td>
</tr>
<tr>
<td>Mauritius</td>
<td>24.9</td>
<td>4.4</td>
<td>10.6</td>
<td>5.4</td>
<td>6.6</td>
<td>30.6</td>
</tr>
<tr>
<td>St. Lucia</td>
<td>1,285.3</td>
<td>1,871.2</td>
<td>134.1</td>
<td>--</td>
<td>1,695.0</td>
<td></td>
</tr>
<tr>
<td>St. Kitts and Nevis</td>
<td>318.7</td>
<td>0.0</td>
<td>136.9</td>
<td>127.0</td>
<td>52.8</td>
<td>377.4</td>
</tr>
<tr>
<td>St. Vincent &amp; the G/F</td>
<td>1,483.4</td>
<td>1,952.3</td>
<td>237.2</td>
<td>107.9</td>
<td>86.0</td>
<td>635.8</td>
</tr>
<tr>
<td>Suriname</td>
<td>12,116.5</td>
<td>8,826.0</td>
<td>1,726.0</td>
<td>1,551.0</td>
<td>13.5</td>
<td>23,449.0</td>
</tr>
<tr>
<td>Trinidad and Tobago</td>
<td>54,774.6</td>
<td>50,913.5</td>
<td>236.0</td>
<td>3,486.9</td>
<td>217.9</td>
<td>13,843.5</td>
</tr>
<tr>
<td>Total Cancom Countries</td>
<td>343,585.2</td>
<td>232,883.5</td>
<td>57,410.8</td>
<td>52,868.8</td>
<td>7,422.1</td>
<td>134,138.3</td>
</tr>
<tr>
<td>Percentage Distribution</td>
<td>100.0</td>
<td>66.5</td>
<td>16.5</td>
<td>14.3</td>
<td>2.1</td>
<td></td>
</tr>
</tbody>
</table>

### Total Imports

*Total Imports: 146,567.7* 144,577.6 17,827.6 18,517.5 13,776.6 24,522.6

### Total Exports

*Total Exports: 4,876.2* 3,599.8 63.4 27.9 5.8 8,510.5

### Estimated Domestic Supply

*Estimated Domestic Supply: 851,858.7* 332,960.9 75,696.1 62,712.8 21,132.9 67,222.8

### Percentage Distribution

<table>
<thead>
<tr>
<th></th>
<th>851,858.7</th>
<th>332,960.9</th>
<th>75,696.1</th>
<th>62,712.8</th>
<th>21,132.9</th>
<th>67,222.8</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Imports to Domestic Production</td>
<td>42.0</td>
<td>45.8</td>
<td>39.5</td>
<td>28.5</td>
<td>195.6</td>
<td>16.0</td>
</tr>
<tr>
<td>% of Imports to Domestic Supply</td>
<td>29.8</td>
<td>34.4</td>
<td>23.4</td>
<td>17.0</td>
<td>65.0</td>
<td>32.4</td>
</tr>
<tr>
<td>% of Exports to Domestic Production</td>
<td>1.2</td>
<td>1.7</td>
<td>0.1</td>
<td>0.1</td>
<td>0.1</td>
<td>0.1</td>
</tr>
<tr>
<td>% of Production to Domestic Supply</td>
<td>71.0</td>
<td>63.9</td>
<td>76.6</td>
<td>83.0</td>
<td>35.8</td>
<td>193.8</td>
</tr>
</tbody>
</table>

Source: Data generated from Country Statistics

Denotes No Data Available

Domestic supply of meat in 2008 is calculated at 491.9 million kg of which poultry accounted for 67.7% as compared to 15.2%, 12.8% and 4.3% for beef, pork and mutton respectively. A review of the composition of the domestic meat supply indicates the following characteristics.
Percentage of imports to domestic production (PIDP) and the percentage of imports to domestic supply (PIDS) are calculated at 42.0% and 29.8% respectively. These statistics indicate that this industry can be reviewed and expanded to close the gap especially in the poultry and pork industry within the member states.

Percentage of production to domestic supply (PPDS) is calculated at 71.0% which indicates a deficit of 29.0% in total meat supply among CARICOM member states.

Domestic supply of poultry in 2008 is calculated at 333.0 million kg and account for 67.7% of the region’s meat supply. A review of the composition of the economic coefficients in this category is provided below.

- PIDP and PIDS are calculated at 45.0% and 31.4% respectively.
- In addition the PPDS is calculated at 69.8% which indicates a deficit of 30.2%.

Given this deficit as indicated by these indicators production should be expanded to meet this demand.

Domestic supply of beef in 2008 is calculated at 75.0 million kg of which 57.5 million kg or 76.6% originate from domestic production. A review of the indicators reveals that the PPDS and PIDS are calculated at 76.6% and 23.4% respectively. This is an area where production could be expanded to meet local demand and reduce imports where the PIDP is calculated at 30.6%.

Domestic supply of pork in 2008 is calculated at 62.7 million kg and account for 12.8% of the region’s meat supply. Domestic production is estimated at 52.1 million kg and accounts for 83.0% of the total domestic supply. A review of the indicators reveals that the PPDS and PIDS are calculated at 83.0% and 17.0% respectively. This is an area where production could be expanded to meet local demand and reduce imports where the PIDP is calculated at 20.5%.

Domestic supply of mutton inclusive of goat meat in 2008 is calculated at 21.2 million kg and account for 4.3% of the region’s meat supply. Domestic production is estimated at 7.4 million kg and accounts for 35.0% of the total domestic supply. A review of the indicators reveals that the PPDS and PIDS are calculated at 65.0% and 35.0% respectively. This is an area where production could be expanded to meet local demand and reduce imports where the PIDP is calculated at 185.6%.

Domestic supply of fish in 2008 is calculated at 67.1 million kg. Imports were recorded at 21.5 million kg and exports at 88.5 million kg in 2008. Domestic production is estimated at 134.1 million kg and accounts for almost twice the total domestic supply. A review of the indicators reveals that the PPDS and PIDS are calculated at 199.8% and 32.1% respectively. The PIDP and the PEDP are calculated at 16.0% and 66.0% respectively.

3.2.4.04 Imports of pulses and root crops fresh/chilled/frozen

Black eye pea imports and exports: imports in 2008 were calculated at 1.8 million kg whereas exports amounted to 6.1 million kg or 338.7 over imports. The two major importing countries were Guyana and Trinidad and Tobago which accounted for 73.7% of imports with contributions of 48.1% and 25.6% respectively. The major exporting country was Belize which accounted for 99.5% of total exports.

Black eye pea production: was recorded at 2.5 million kg. This figure was less than provided in the trade statistics and was not further computed. This is an area of weakness in the data sets.
Corn imports and exports: imports in 2008 were recorded at 87.1 million kg as compared to 1.6 million kg in exports. The major importing countries were Trinidad and Tobago and Barbados which accounted for 86.6% of the imports with individual contributions of 48.3% and 38.3% each. This product were basically utilised as inputs into the manufacture of livestock feeds for the poultry industry in the main. The major exporting country in the region was Belize which accounted for 88.2% of the total quantity of exports.

Domestic supply of corn was calculated at 155.7 million kg of which 70.1 million kg or 45.1% was domestic production. The indicators PPDS and PIDS were calculated at 45.1% and 55.9% respectively which is interpreted as a deficit of 55.9% in the domestic supply. This crop provides an opportunity for import replacement. It would be instructive to review the Belize model in this area.

Red kidney bean imports and exports: Imports in 2008 were recorded at 8.7 million kg as compared to 2.9 million kg in exports. The major importing countries were Jamaica and Trinidad and Tobago which accounted for 84.2% of the imports with individual contributions of 66.6% and 17.6% respectively. The major exporting country was Belize which accounted for 98.2 of the quantity exported.

Domestic supply of red kidney beans was calculated at 11.8 million kg of which 6.0 million kg or 51.3% was domestic production. The indicators PPDS and PIDS were calculated at 51.3% and 73.7% respectively which is interpreted as a deficit of 48.7% in the domestic supply. This crop provides an opportunity for import replacement. It would be instructive to review the Belize model in this area.

Carrot imports and exports: imports in 2008 were recorded at 7.1 million kg whereas exports were a minuscule 2,900 kg in exports. The major importing countries were Trinidad and Tobago and the Bahamas which accounted for 68.2% of the imports with individual contributions of 54.4% and 14.0% respectively.

Domestic supply of carrots was calculated at 12.6 million kg of which 5.4 million kg or 43.3% was domestic production. The indicators PPDS and PIDS were calculated at 43.4% and 56.6% respectively which is interpreted as a deficit of 43.4% in the domestic supply. It is important to note that Jamaica, Belize and Antigua/Barbuda account for 75.4% of domestic production with individual contributions of 34.8%, 34.9% and 5.7% respectively. This crop provides an opportunity for import replacement. The models used in these three countries are instructive in reducing demand via imports.

Cassava imports and exports: imports in 2008 were recorded at 365,000 kg whereas exports were a minuscule 42,600 kg in exports.

Domestic supply of cassava was calculated at 38.6 million kg of which 38.3 million kg or 99.2% was domestic production.

Dasheen imports and exports: imports in 2008 were recorded at 1.4 million kg whereas exports were 4.0 million kg in exports. The major importing country was Trinidad and Tobago which accounted for 92.6% of the imports. The major exporting countries were St Vincent and the Grenadines, Jamaica and Dominica which accounted for 99.0% of exports with individual contributions of 64.6%, 18.8% and 15.6% respectively.

Domestic supply of dasheen was calculated at 28.5 million kg of which 31.0 million kg or was domestic production. The indicators PPDS and PIDS were calculated at 109.0% and 12.8% which indicates self-sufficiency as well as opportunities for export expansion. It is important to note that Dominica, Jamaica and St. Vincent and the Grenadines account for 89.2% of domestic production with individual contributions of 41.1%, 36.8% and 11.3% respectively.
Irish potato imports and exports: imports in 2008 was recorded at 125.6 million kg whereas exports was 0.6 million kg in exports. The major importing countries were Trinidad and Tobago, Jamaica, Grenada and Barbados which accounted for 87.5% of the imports with individual intakes of 59.5%, 13.5%, 7.3% and 7.2% respectively.

Domestic supply of Irish potato was calculated at 131.9 million kg of which 7.0 million kg or was domestic production. The indicators PPDS and PIDS were calculated at 5.3% and 95.3% the domestic supply is basically dependent on imports. It is important to note that Jamaica and Belize account for 98.0% of domestic production with individual contributions of 70.7% and 27.3% respectively.

<table>
<thead>
<tr>
<th>Name of County/Region</th>
<th>000 Kgs.</th>
<th>Black Eye</th>
<th>Corn</th>
<th>Red Kidney Beans</th>
<th>Carrot</th>
<th>Cassava</th>
<th>Dashen</th>
<th>Irish Potato</th>
<th>Sweet Potato</th>
<th>Yams</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>30.7</td>
<td>575.4</td>
<td>727.2</td>
<td>215.3</td>
<td>244.2</td>
<td>57.4</td>
<td>62.3</td>
<td>892.9</td>
<td>119.7</td>
<td>51.9</td>
</tr>
<tr>
<td>Bahamas</td>
<td>0.5</td>
<td>138.0</td>
<td>77</td>
<td>93.4</td>
<td>238.7</td>
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<td>3,377.9</td>
<td>524.4</td>
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<td>Barbados</td>
<td>7.9</td>
<td>42,697.3</td>
<td>45.8</td>
<td>414.5</td>
<td>3.7</td>
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<td>35.4</td>
<td>28.7</td>
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<td>Belize</td>
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<td>3,854.3</td>
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<tr>
<td>Dominica</td>
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<td>451.2</td>
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</tr>
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<td>Grenada</td>
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<td>1,439.9</td>
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<td>0.0</td>
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<td>0.0</td>
<td>5,193.1</td>
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</tr>
<tr>
<td>Haiti</td>
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<tr>
<td>Jamaica</td>
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<td>5,275.8</td>
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<td>0.0</td>
<td>41.1</td>
<td>79.2</td>
<td>110.7</td>
<td>7,212.1</td>
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<td>Montserrat</td>
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<td>0.0</td>
<td>111.7</td>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>St. Kitts And Nevis</td>
<td>0.7</td>
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<td>81.9</td>
<td>150.0</td>
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<td>1,541.1</td>
<td>1.3</td>
<td>0.0</td>
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</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>28.8</td>
<td>85.0</td>
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<td>0.0</td>
<td>843.9</td>
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</tr>
<tr>
<td>Suriname</td>
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<td>0.0</td>
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<td>0.0</td>
<td>1,553.7</td>
<td>0.1</td>
<td>0.0</td>
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</tr>
<tr>
<td>Trinidad And Tobago</td>
<td>499.3</td>
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<td>1,216.1</td>
<td>3,068.0</td>
<td>4.1</td>
<td>1,266.2</td>
<td>26,081.0</td>
<td>1,084.5</td>
<td>166.4</td>
<td></td>
</tr>
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<td>Total Caricom Countries</td>
<td>1,713.9</td>
<td>18,669.5</td>
<td>1,611.6</td>
<td>7,116.6</td>
<td>352.0</td>
<td>1,691.4</td>
<td>25,208.0</td>
<td>9,413.9</td>
<td>191.1</td>
<td></td>
</tr>
</tbody>
</table>

Source: Data generated from Country Statistics

Sweet potato imports and exports: imports in 2008 were recorded at 9.4 million kg whereas exports were 1.6 million kg in exports. The major importing countries were Jamaica and Trinidad and Tobago which accounted for 92.7% of the imports with individual intakes of 82.0% and 10.7% respectively. The major exporting country was St. Vincent and the Grenadines which accounted for 94.0% of the exports in 2008.
Domestic supply of sweet potato was calculated at 43.0 million kg of which 35.2 million kg was domestic production. The indicators PPDS and PIDS were calculated at 81.9% and 21.9%. It is important to note that Jamaica, Dominica and St. Vincent and the Grenadines account for 84.2% of domestic production with individual contributions of 73.3%, 6.8% and 4.1% respectively.

Yam imports and exports: imports in 2008 was recorded at 0.2 million kg whereas exports was 8.3 million kg in exports. The major exporting countries were Jamaica and St. Vincent and the Grenadines which accounted for 96.4% of the exports with market shares of 91.9% and 4.5% respectively.

Domestic supply of yams was calculated at 111.5 million kg of which 119.6 million kg was domestic production. The indicators PPDS were calculated at 107.3. It is important to note that Jamaica and Dominica account for 95.0% of domestic production with individual contributions of 88.7%, and 6.3% respectively.

Hot pepper imports and exports: imports in 2008 was recorded at 0.4 million kg whereas exports was 0.8 million kg in exports. The major exporting countries were Jamaica, Guyana, Suriname and the Bahamas which accounted for 94.0% of the exports with market shares of 68.6% and 25.3% respectively.

Domestic supply of hot pepper was calculated at 10.3 million kg of which 10.9 million kg was domestic production. The indicators PPDS were calculated at 103.7 which indicates self-sufficiency in the region. It is important to note that Jamaica, Guyana, Suriname and the Bahamas account for 90.9% of domestic production with individual contributions of 50.0%, 17.7%, 16.7% and 6.3% respectively.

Onion imports and exports: imports in 2008 were recorded at 36.6 million kg whereas exports were negligible.
Domestic supply of onion was calculated at 40.3 million kg of which 3.7 million kg was domestic production. The indicators PPDS were calculated at 9.3% which indicates a deficit of 90.7% in the region. It is important to note that certain CARICOM member states have already commenced production in this commodity. The countries are Belize, Guyana, Jamaica, Bahamas, St Kitts/Nevis and Antigua /Barbuda.

Pumpkin imports and exports: imports in 2008 were recorded at 0.3 million kg whereas exports amounted to 1.7 million kg. The major exporting countries were Guyana and Jamaica which accounted for 95.7% of the quantity exported with contributions of 69.3% and 26.4% each.

Domestic supply of pumpkin was calculated at 43.1 million kg of which 44.5 million kg was domestic production. The indicators PPDS were calculated at 103.2% which indicates a surplus of 3.2% in the region. This surplus is reflected in the PEDP of 3.8% for the period 2008.

Tomato imports and exports: imports in 2008 were recorded at 1.6 million kg whereas exports amounted to 0.3 million kg. The major importing countries were Bahamas and Jamaica which accounted for 86.1% of the quantity imported with contributions of 67.3% and 18.8% respectively.

Domestic supply of tomato was calculated at 31.6 million kg of which 30.4 million kg was domestic production. The indicators PPDS were calculated at 96.3% which indicates a deficit of 3.7% in the region. The countries Jamaica, the Bahamas, Guyana and Trinidad and Tobago accounted for 87.3% of domestic production in the region with shares of 63.7%, 8.1%, 6.5% and 6.0% respectively.

Melon imports and exports: imports in 2008 were recorded at 1.4 million kg whereas exports amounted to 0.4 million kg. The major importing countries were Barbados, Belize and the Bahamas which accounted for 88.8% of the quantity imported with contributions of 46.8%, 29.3% and 12.7% respectively.

Domestic supply of melon was calculated at 39.1 million kg of which 38.1 million kg was domestic production. The indicators PPDS were calculated at 97.5% which indicates a deficit of 2.5% in the region. A review of production trends within the region indicate that the Bahamas, Jamaica, Trinidad and Tobago and Barbados accounted for 86.4% of domestic production with shares of 37.1%, 32.1%, 10.5% and 6.7% respectively.

Coconut imports and exports: imports in 2008 were recorded at 0.2 million kg whereas exports amounted to 1.9 million kg. The major exporting countries were St. Vincent and the Grenadines, Guyana and Dominica which accounted for 93.5% of the quantity imported with contributions of 38.2%, 37.0% and 18.3% respectively.

Domestic supply of coconut was calculated at 188.9 million kg of which 190.7 million kg was domestic production. The indicators PPDS were calculated at 100.9% which indicates a marginal surplus of 0.9% in the region. A review of production trends within the region indicate that the Jamaica, Guyana and Dominica accounted for 91.9% of domestic production with shares of 50.0%, 35.9%, 10.5% and 6.0% respectively.

Plantain imports and exports: imports in 2008 were recorded at 0.2 million kg whereas exports amounted to 1.9 million kg. The major exporting countries were St. Vincent and the Grenadines and Dominica which accounted for 100.0% of the quantity imported with contributions of 57.3% and 42.7% respectively.

Domestic supply of plantain was calculated at 3.9 million kg of which 3.1 million kg was domestic production. The indicators PPDS were calculated at 98.1% which indicates a marginal deficit of 1.9% in the region. A review of production trends within the region...
indicate that the Jamaica, Suriname, Dominica and Guyana accounted for 84.4% of domestic production with shares of 35.3%, 22.0%, 17.3% and 9.8% respectively.

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Hot Pepper</th>
<th>Onion</th>
<th>Herbs/Spices</th>
<th>Pumpkin</th>
<th>Tomato</th>
<th>Melon</th>
<th>Coconut</th>
<th>Plantain</th>
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Source: Data generated from Country Statistics  __ Denotes No Data Available

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<tr>
<th>Name of Country/Region</th>
<th>Hot Pepper</th>
<th>Onion</th>
<th>Herbs/Spices</th>
<th>Pumpkin</th>
<th>Tomato</th>
<th>Coconut</th>
<th>Plantain</th>
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Source: Data generated from Country Statistics  __ Denotes No Data Available
**TABLE 3.24.08: DOMESTIC PRODUCTION OF VEGETABLES FRESH, CHILLED, FROZEN BY COUNTRY, 2008 (000 Kgs.)**

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<thead>
<tr>
<th>Name of Country/Region</th>
<th>Hot Pepper</th>
<th>Onion</th>
<th>Herbs/Spices</th>
<th>Pumpkin</th>
<th>Tomato</th>
<th>Melon</th>
<th>Coconut</th>
<th>Partan</th>
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<td>% of Imports to Domestic Supply</td>
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<td>% of Production to Domestic Supply</td>
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<td>96.2</td>
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<td>104.9</td>
<td>98.4</td>
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</table>

Source: Data generated from Country Statistics - Demos No Data Available

**Ackee imports and exports:** imports in 2008 were recorded at 0.01 million kg whereas exports amounted to 1.7 million kg. The major exporting country was Jamaica which accounted for 99.5% of the quantity exported.

**Domestic supply of ackee** was calculated at 27.4 million kg of which 29.0 million kg was domestic production. The indicators PPDS were calculated at 106.1% which indicates a marginal surplus of 6.1% in the region. A review of production trends within the region indicate that Jamaica accounts for 100.0% of domestic production.

**Breadfruit imports and exports:** imports in 2008 were recorded at 0.001 million kg whereas exports amounted to 1.4 million kg. The major exporting countries were St. Lucia Jamaica and Barbados which accounted for 96.1% of the quantity exported with market shares of 48.9%, 37.4% and 9.8% each.

**Domestic supply of breadfruit** was calculated at 2.5 million kg of which 3.9 million kg was domestic production. The indicators PPDS were calculated at 154.3% as compared to 35.3% for PEDP. A review of production trends within the region indicate that St. Vincent and the Grenadines, St. Lucia and Dominica account for 91.5% of domestic production with shares of 46.1%, 36.7% and 8.5% each.

**Golden apple imports and exports:** imports in 2008 were recorded at 0.03 million kg whereas exports amounted to 0.2 million kg. The major exporting country was St. Vincent and the Grenadines which accounted for 91.1% of the quantity exported.

**Domestic supply of golden apple** was calculated at 3.1 million kg of which 3.3 million kg was domestic production. The indicators PPDS were calculated at 106.0% as compared to 6.7% for PEDP. A review of production trends within the region indicate that...
Grenada and St. Vincent and the Grenadines account for 97.3% of domestic production with shares of 61.7% and 35.6% each.

**Mango imports and exports:** imports in 2008 were recorded at 0.6 million kg whereas exports amounted to 9.5 million kg. The major exporting countries were Haiti, Jamaica and St. Vincent and the Grenadines which accounted for 99.9% of the quantity exported with market shares of 88.4%, 5.5% and 3.9% respectively.

**Domestic supply of mango** was calculated at 7.6 million kg of which 16.5 million kg was domestic production. The indicators PPDS and PEDP were calculated at 217.7% 57.6% respectively. A review of production trends within the region indicate that the Bahamas, Guyana, Dominica and St. Vincent and the Grenadines account for 82.9% of domestic production with shares of 24.5%, 24.7%, 13.1% and 10.6% each. It is important to note that no production data were available for Haiti which accounted for 88.4% of mango exports in the region.

**Pawpaw imports and exports:** imports in 2008 were recorded at 0.2 million kg whereas exports amounted to 65.1 million kg. The major exporting country was Belize which accounted for 98.1% of the quantity exported.

**Domestic supply of pawpaw** was calculated at 3.5 million kg of which 68.4 million kg was domestic production. The indicators PEDP were calculated at 95.2% which indicate that the majority of the crop was exported and approximately 4.8% were utilised for domestic consumption. A review of production trends within the region indicate that Belize accounts for 97.5% of domestic production.

**Table 3.2.4.10: Imports of Fruits Fresh, Chilled, or Frozen by Country, 2004 to 2008 (000 Kgs.)**

<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Ackee</th>
<th>Breadfruit</th>
<th>Golden Apple</th>
<th>Mango</th>
<th>Pawpaw</th>
<th>Pineapple</th>
<th>Sour-Sop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua &amp; Barbuda</td>
<td>0.0</td>
<td>0.0</td>
<td>5.9</td>
<td>1.6</td>
<td>15.7</td>
<td>226.4</td>
<td>0</td>
</tr>
<tr>
<td>Bahamas</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>257.5</td>
<td>81.5</td>
<td>214.1</td>
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</tr>
<tr>
<td>Barbados</td>
<td>0.0</td>
<td>0.1</td>
<td>7.7</td>
<td>288.6</td>
<td>83.2</td>
<td>0.0</td>
<td>0.5</td>
</tr>
<tr>
<td>Belize</td>
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<td>0.0</td>
<td>4.4</td>
<td>0.0</td>
<td>6.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Dominica</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Grenada</td>
<td>0.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.5</td>
<td>0.0</td>
<td>7.1</td>
<td>0.0</td>
</tr>
<tr>
<td>Guyana</td>
<td>0.0</td>
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<td>0.3</td>
<td>1.0</td>
<td>3.3</td>
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<tr>
<td>Haiti</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.4</td>
</tr>
<tr>
<td>Jamaica</td>
<td>15.0</td>
<td>0.0</td>
<td>0.0</td>
<td>1.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Montserrat</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>2.4</td>
<td>0.0</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>0.0</td>
<td>0.0</td>
<td>0.1</td>
<td>0.0</td>
<td>0.0</td>
<td>82.6</td>
<td>0.0</td>
</tr>
<tr>
<td>St. Kitts &amp; Nevis</td>
<td>0.2</td>
<td>0.1</td>
<td>0.2</td>
<td>8.7</td>
<td>2.0</td>
<td>63.2</td>
<td>0.0</td>
</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>2.7</td>
<td>0.1</td>
<td>5.5</td>
<td>0.0</td>
</tr>
<tr>
<td>Suriname</td>
<td>0.0</td>
<td>0.0</td>
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<td>16.0</td>
<td>0.0</td>
<td>0.3</td>
<td>0.0</td>
</tr>
<tr>
<td>Trinidad &amp; Tobago</td>
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<td>0.0</td>
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</tr>
<tr>
<td>Total Caricom Countries</td>
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<td>33.5</td>
<td>58.2</td>
<td>189.5</td>
<td>1,783.7</td>
<td>0.7</td>
</tr>
</tbody>
</table>

Source: Data generated from Country Statistics | Denotes No Data Available
Pineapple imports and exports: imports in 2008 were recorded at 1.7 million kg whereas exports amounted to 0.1 million kg. The major importing countries were Trinidad and Tobago, Antigua/Barbuda and the Bahamas which accounted for 90.4% of the quantity exported with market shares of 64.5%, 13.3% and 12.6% respectively.

Domestic supply of pineapple was calculated at 10.5 million kg of which 8.7 million kg was domestic production. The indicators PPDS were calculated at 84.7% which indicate a deficit of 15.3%. A review of production trends within the region indicate that Jamaica, Belize, Trinidad and Tobago, Guyana and the Bahamas account for 91.8% of domestic production with contributions of 23.4%, 24.2%, 17.4%, 14.5% and 12.3% respectively.
<table>
<thead>
<tr>
<th>Name of Country/Region</th>
<th>Akee</th>
<th>Breadfruit</th>
<th>Golden Apple</th>
<th>Mango</th>
<th>Pawpaw</th>
<th>Pineapple</th>
<th>Sour-Sop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antigua And Barbuda</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Bahamas</td>
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<td>64.9</td>
<td>0.0</td>
<td>4,051.5</td>
<td>422.1</td>
<td>1,570.9</td>
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<tr>
<td>Barbados</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Belize</td>
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<td>0.0</td>
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<td>58,476.8</td>
<td>2,102.0</td>
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<td>2,157.0</td>
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<tr>
<td>Grenada</td>
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<td>1,505.2</td>
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<td>Haiti</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jamaica</td>
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<td>7,456.0</td>
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<tr>
<td>Montserrat</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>St. Lucia</td>
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<td>943.7</td>
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<td>58.5</td>
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<td>89.8</td>
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<tr>
<td>St. Vincent &amp; Grenadines</td>
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<td>1,674.8</td>
<td>1,740.3</td>
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<tr>
<td>Suriname</td>
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<td>0.0</td>
<td>990.0</td>
<td>277.0</td>
<td>300.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Trinidad And Tobago</td>
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<td>840.3</td>
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<tr>
<td>Total Caricom Countries</td>
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<td>3,380.2</td>
<td>3,258.3</td>
<td>16,515.5</td>
<td>68,483.4</td>
<td>8,638.2</td>
<td>426.2</td>
</tr>
</tbody>
</table>

### Total Imports

- **Total Imports**: 29,042.7
- **Estimated Domestic Supply**: 27,377.4
- **% of Imports to Domestic Product**: 0.1
- **% of Imports to Domestic Supply**: 0.1
- **% of Exports to Domestic Product**: 5.8
- **% of Production to Domestic Supply**: 196.1

Source: Data generated from Country Statistics

Denotes No Data Available


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