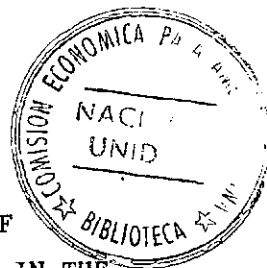


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ECONOMIC COMMISSION FOR LATIN AMERICA
 AND THE CARIBBEAN
 Subregional Headquarters for the Caribbean
 CARIBBEAN DEVELOPMENT AND CO-OPERATION COMMITTEE



REPORT ON A SURVEY OF
 AGRO-INDUSTRIAL ACTIVITIES IN THE
 ORGANIZATION OF EASTERN CARIBBEAN STATES



UNITED NATIONS

ECONOMIC COMMISSION FOR LATIN AMERICA AND THE CARIBBEAN
 Subregional Headquarters for the Caribbean

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IN THE CARIBBEAN

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INTRODUCTION

This report presents the results of a survey of agro-industrial activities in the member countries of the Organization of Eastern Caribbean States (OECS), viz: Antigua and Barbuda, Dominica, Grenada, Montserrat, Saint Christopher/Nevis, Saint Lucia and Saint Vincent and the Grenadines.

The survey was carried out by the Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean as part of a project funded by the Government of the Netherlands to identify and evaluate the potential for the Development of Rural Agro-based Industries in the Caribbean LDCs.

This survey also fulfils, in part, the mandate of the Sixth Session of the Caribbean Development and Co-operation Committee (CDCC), to ECLAC Subregional Headquarters for the Caribbean, to carry out a survey of agro-industrial activities in the CDCC area. The survey would be carried out "... to obtain information for evaluation and analyses which may result in actions toward support for agro-industrial activities in the subregion."^{1/}

Users of this survey should also refer to a document entitled 'Report of a Meeting on Small Scale Agro-processing Activities in the Organization of Eastern Caribbean States' (LC/CAR/G.152) for analysis and comments on the food-processing activities in the OECS.

I. BACKGROUND

Although agriculture is a major economic activity in the OECS, the islands show strong dependence on imported skills and food supplies to meet the dietary needs of the population.

The unfavourable food supply status is due in part, to the high levels of post-harvest losses resulting from poor handling, inadequate storage facilities and a poorly developed food preservation capability.

^{1/} Programme of Work for the Caribbean Development and Co-operation Committee 1982. E/CEPAL/CDCC/78/Rev.1.

Seasonality of production also results in alternating period of surplus and prolonged shortages. Recent estimates place post-harvest losses at approximately 30 per cent for fruits, vegetables and root tubers.

National governments and Caribbean regional organizations are fully conscious of the food and nutrition problems of the region and there is now increasing concern over food supply and food security. This concern has focused attention on the need for complementary programmes to increase production, reduce post-harvest losses and improve the capability to process and preserve the scarce food resources.

Agro-industrial activities in the OECS have been organized and developed to complement, as downstream activities, the traditional export commodities which include sugar and sugar cane based products; cotton; coconut based products and arrowroot.

The development of agro-processing capability to use processable primary products which are not traditional exports, and to produce commodities for the local and regional markets is a recent phenomenon. These activities are presently small-scale, appear to be poorly organized and lack of necessary support services. Consequently, the component of the agro-processing sector which refers mainly to food processing has remained underdeveloped, operating at low levels. At the same time, there is wastage of primary products which are the main inputs into similar processed commodities imported from extraregional sources. Further, the technology required to process some of the available raw material has been proven and tested in the Caribbean.

Some efforts are now being made in various countries to promote food processing at the national level. In addition, the University of the West Indies and the Caribbean Industrial Research Institute carry out research programmes which aim to develop and to improve food processing technology in the countries which they serve. Further, the private sector and the governments of the Caribbean Community and Caribbean Common Market have established the Caribbean Food Corporation as the executing agency to achieve the production objectives of a regional plan to increase food production and reduce dependence on extraregional sources. The mandate of the Caribbean Food Corporation includes the promotion and development of food processing.

II. OBJECTIVES OF THE SURVEY

The objectives of the survey were to:

- (i) Describe the extent, the structure and size of the agro-industrial sector in the OECS countries;
- (ii) Identify the major areas that have been developed and the main constraints to the general growth and development of agro-industries;
- (iii) Identify the linkages between the agro-industrial sector, national primary agricultural production and market outlets;
- (iv) Obtain estimates of employment in agro-processing;
- (v) Identify the types and sources of raw materials used;
- (vi) Obtain information relating to output and capacity utilization of the industrial plant;
- (vii) Obtain information on market conditions.

III. METHODOLOGY

A copy of the questionnaire which was used for the survey is included at Annex I. Enumeration and follow-up interviews were carried out during the period September to December 1984 by persons with good knowledge of the local agriculture and agro-industry sectors.

Preliminary lists of agro-industries were compiled based on information obtained from the Ministries of Agriculture, Industry, and Development and from the local Chambers of Commerce. The lists were supplemented by field searches to identify additional processors.

High level local personnel, including Produce Chemists, a retired Director of Agriculture, and an agro-industry consultant were retained to carry out the interviews/enumeration. Cross-checking and verification of responses were carried out when considered necessary.

IV. SCOPE OF THE SURVEY

Efforts were made to include all agro-processing activities in the seven states comprising the OECS. Whereas all of the major agro-processing activities were identified, it was clearly not possible to ensure the inclusion of all the small, often single-person, home processing activities scattered throughout the islands. However, it is believed that the survey identified all of the large and medium scale activities, and also most of the small operators who offer products for sale. Consequently, the survey can be accepted as being fully representative of the ongoing agro-processing activities in the OECS.

V. RESULTS OF THE SURVEY

The results of the survey in each of the seven countries are given at Tables 1 to 7.

The food processing sector is characterized by extreme disparities in the facilities and operational standards of the establishments that process various commodities. The processing of sugar cane and its by-products; oils and fats and their derivatives, and imported staples such as wheat flour is carried out in relatively well-established and well-managed facilities with access to finance, technology and skills. That part of the food processing sector concerned with tropical fruits, vegetables, roots and tubers is very poorly developed; however, it is these commodities which are produced by the larger numbers of farmers, are subject to periods of pronounced over-supply and scarcity and, as mentioned earlier, are subject to high levels of post-harvest losses.

It is also to be noted that in the OECS, the private entrepreneurs and the larger number agro-processing activities are concerned mainly with the food sector. However, in terms of economic importance, the sugar industry, rum distillation, coconut and coconut products including the manufacture of soap, arrowroot, and sea island cotton remain dominant in relation to the processing of fruits, vegetables, spices and condiments, root crops and essential oils.

A. Organization of the Agro-processing Sector in the OECS

The existing agro-industries in the OECS may be sub-divided into the following categories:

(i) Home Industry: Usually one-person kitchen operations with occasional help using standard domestic kitchen utensils. Production, marketing and procurement of raw materials are all ad hoc. The processor usually produces some of the main raw material ingredient of the finished product and will also purchase from farmers and from marketing agencies. Other inputs are usually purchased locally in small lots and in general, recycled glass containers are used. The home processor often markets from his/her home with occasional sales to supermarkets and retail shops. The volume of production is low and stocks are seldom held. The level of production is determined by easy availability of raw materials and containers and by the processors estimate of demand from a limited clientele.

(ii) Pilot Plant: The Produce Chemists' Laboratories (PCLs) set up by governments are representative of this category. They are departments or sections of the Ministries of Agriculture, financed directly from the public service budget and their primary function is research into product development. Some PCLs also carry out pilot commercial activities selling the output on the local market. However, the accepted policy is to cease production whenever private firms enter into production of specific products. Although the PCLs do not operate as fully fledged commercial units they promote agro-processing by demonstrating proven processes. They also disseminate research results, provide technical advice and limited quality control services to processors, thereby addressing some of the constraints to further developments of the industry.

The PCLs experience a number of constraints which place limits on their ability to operate as commercial production units. The constraints include having to operate within a civil service structure and having to adhere to civil service procedures, the lack of business expertise, constraints with operational finance and not being required

to operate as a financially viable enterprise. The product quality is usually of a high standard and well packaged. Emphasis is placed on using available surplus primary produce and consequently there are often close links with the national agricultural marketing agency. Economic considerations including marketing, overhead costs, equipment depreciation, recapitalization and the cost of working capital do not appear to receive the attention which would be demanded of a commercial enterprise.

(iii) Cottage Industry: Small commercial operations using some patented equipment, employing 10-15 persons and operating usually on a year round basis. Procurement and marketing are fairly well organized and attention is given to specifications, quality control and packaging.

(iv) Commercial, large scale processing: This category includes sugar manufacture, rum distillation, the processing of copra and edible oil refining, the manufacture of soap and the production of citrus juices. These operations are usually very closely links with primary production units and may be operated as integrated activities. Relatively large numbers of people are employed and these industries have significant impact on the economies of the islands. At present, the sugar factories are owned and operated by state enterprises.

The number of units in each category is given at Table 8. This analysis shows that home and cottage industries account for some 80 per cent of the number of operations, the commercial scale 17 per cent and the pilot scale 3 per cent.

The distribution between food processors, leather and forestry products and other operations - sugar production, alcohol distillation, cotton and non-edible coconut products is given at Table 9. The larger number of operations is concerned with small scale food processing, using mainly locally-produced raw materials.

B. Sources of Raw Materials

Except for the milling of wheat flour and the production of animal feeds using wheat by-products, the main raw materials used in agro-processing are produced locally.

The range of local raw materials used is given for each country in Tables 1 to 7 and summarized at Table 10. These tables show the wide range of fruits and vegetables utilized by the food processing units.

Most of the raw materials processed by the home industries, the PCLs and to a lesser extent, the cottage industries are surplus material originally intended for the fresh market. The problems and constraints experienced when processors, even the very small operators, rely on fresh market surplus are recognized. Consequently, the cottage scale operators have attempted to reduce these constraints by producing a part of their raw materials and/or entering into contracts with farmers for the supply of specified raw materials at certain times.

C. Packaging

All containers are imported. The home industries typically use recycled glass jars and bottles, but new covers. The cottage industries and the Produce Chemists Laboratories use mainly new containers but also make limited use of recycled glass jars and bottles.

The availability of glass and plastic packaging is usually considered a problem by most agro-processors in the OECS. The home and cottage industries consider the container procurement problem as a major constraint since supplies cannot be obtained locally and the small processors are unable to finance the large lot sizes offered by most manufactures. The largest commercial processors usually find that their packaging costs are a relatively high percentage of the finished product due mainly to the freight, handling and storage cost on stocks of empty containers.

D. Utilization of Plant Capacity

Estimates of capacity utilization (Tables 1 to 7) were based on rated output where such information was available and on the perceptions of the processors in the case of home industries. In most cases the production capacity was grossly underutilized.

Whereas the values given for the commercial, cottage industries and pilot plants are reliable, those for the home industries are the best estimates available. The factors which contribute to reduced capacity utilization in the home industries are many and varied, and include easy availability of raw materials or of a specific ingredient, the shortage of containers, low acceptability of products due to quality considerations, competition from similar imported commodities at lower prices, poor keeping quality, etc.

E. Production of Processed Commodities

The types and quantities of processed commodities produced by each island are given at Table 11. Similar products are produced throughout the islands although differences in primary production capability are obvious. This is indicated with respect to sugar in Antigua and Saint Christopher/Nevis, copra in the Windward Islands, arrowroot in Saint Vincent and the Grenadines, citrus and essential oils in Dominica and sea island cotton products in Montserrat.

Similarities and potential complementary production, are most obvious in the food processing subsector. Small quantities of jams, jellies, fruit juices, condiments and food seasonings are produced by a relatively large number of small operators each acting independently of each other, with no standards and with minimal quality control measures. In brief, this part of the agro-processing sector is not organized either to make full use of the available local raw materials or to supply the needs of even the local markets. As a consequence, imports of similar products are large in relation to local production.

F. Marketing

The bulk of the raw sugar, raw cotton, arrowroot, lime juice, lime oil, and bay oil are sold on European and North American markets. All other products are highly dependent on the local and the CARICOM markets as indicated in Tables 1 to 7.

Coconut based products, alcohol, bay rum, hot pepper concentrate and some juices and jellies produced by cottage industries enter into the CARICOM trade.

The home processors sell almost exclusively on the local markets. Consequently, only small volumes of processed food commodities enter into extraregional trade.

In general, local and CARICOM marketing of output from the home industries and is not well organized. These processors have been unable to ensure regular volume supplies of products which can compete with similar imports both in terms of price and standards. The survey showed clearly that marketing arrangements would be a major factor in the development of a viable food processing industry.

G. Employment

Some 2,700 persons are employed directly but not all full time, in the agro-industrial sector in the seven OECS countries. The employment by island and major activity is given at Table 12. It should be noted that employment in the sugar industry is seasonal and part time employment is common in the cotton, food processing and other categories.

The sugar factories, cotton ginning, the small cotton spinning and weaving operation in Montserrat, and the Produce Chemists Laboratories are public sector concerns. The sugar factories are relatively large operations with large numbers of employees compared with the food processing which is small scale and mostly privately owned.

There are some 10 persons employed in the public services of the OECS with professional training, some at post graduate level, in food chemistry and food technology. A similar number have received technical level training on the job and through short, in-service courses at Caribbean and other institutions.

VI. EXISTING CONSTRAINTS

The constraints experienced in the agro-industrial sector of the OECS include:

(i) Scale of operations which result in high overheads per unit of output;

(ii) Low volume availability of some raw material inputs and the logistics of collection, transportation and delivery to factory. This applies to traditional industries such as sugar, cotton, copra and also to the food processing subsector;

(iii) The relatively high cost per unit of raw material due to the high cost of importing some production inputs, low yield per unit area and using fresh market prices as the reference price for locally produced fruits and vegetables since there is only a small acreage which produces specifically for the processors;

(iv) Much of the equipment in use is obsolete, efficiency is low and down time relatively high due to the age of equipment and long delays in obtaining replacement parts;

(v) The small scale processors are not organized on a business basis and consequently experience severe constraints whenever they seek finance to upgrade and expand their operations;

(vi) The physical facilities are often inadequate to allow efficient operations and to implement effective quality control and standards assurance;

(vii) Most of the small processors, and indeed some of the larger units, lack manufacturing and financial management to identify areas of weakness and to institute measures which could increase the efficiency of their operations;

(viii) Marketing is not organized, and there are no marketing strategies or programmes to promote the finished products on the local and regional markets. It follows that export market promotion is also lacking;

(ix) Policies and related measures have not been implemented to promote and protect small scale food processing and so assist in developing a potentially viable sector of the economy of the OECS.

Table 1

AGRO-PROCESSING ACTIVITIES (1984)

(ANTIGUA AND BARBUDA)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
<u>FOOD PROCESSORS</u>							
1. EUSTACE SAMUEL	Home	-	Honey Beeswax	3,000 lbs 100 lbs	n.a.	1	Local
2. MARGARET WHITE	Home	Tamarind Lemons Guava Plums	Tamarind Ball Marmalade Guava Jelly Plum Wine	2,500 lbs 4,000 lbs 300 lbs 50 gals	60 40 40 60	1	Local (Tourist) U.S.A.
3. SUZANNAH TONGE	Home	Peppers	Pepper Sauce	1,000 gals	50	3	Local U.S.V.I.
4. HEWLETT ENTERPRISES LTD.	Home	Rum Eggs	Cream Punch	500 gals	21	2	Local CARICOM
5. ANTIGUA WINERY	Cottage	n.a.	Orange Wine Cherry Brandy Rich Ruby Red Port Ginger Wine Rum Punch Vodka Grenadine Syrup	n.a. " " " " " "	n.a. " " " " " "	7	Local CARICOM Other Caribbean
6. CARI PACKERS LTD.	Cottage	Local meats	Processed Beef Snouts (Pork) Tails (Pork) Chicken Corned Beef Hams (Pork)	15,629 lbs 6,643 lbs 3,960 lbs 630 lbs 2,568 lbs 1,282 lbs	33 14 4 30 12	5	Local
7. CARIBBEAN BISCUIT AND CONFECTIONARY CO.	Commercial	n.a.	Sweet and Unsweetened Biscuits	n.a.	n.a.	24	Local CARICOM

cont'd...

Table 1 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
8. GOVERNMENT FOOD PROCESSING UNIT	Pilot Plant (Public Sector)	Pineapple	Pineapple Jam	7,300 lbs	40	7 (10 part-time workers)	Local Other Caribbean
		Mango	Mango Jam	925 lbs	37		
		Tomato	Mango Nectar	n.a.	n.a.		
		Pepper	Tomato Ketchup	290 gals	13		
		Sugar	Pepper Sauce	367 gals	90		
		Guava	Guava Jam/Jelly	1,320 lbs	50		
		Carrots	Carambola Drink	43 gals	52		
		Carambola	Lime Juice	140 gals	48		
		Lime	Cherry Jelly	500 lbs	20		
		Cherry					
9. GOVERNMENT ABATTOIR AND MEAT MARKET	Commercial (Public Sector)	Livestock	Beef	426,000 lbs	n.a.	39	Local
		Turtle	Mutton	15,926 lbs	"		
			Goat meat	8,512 lbs	"		
			Pork	60,560 lbs	"		
			Turtle	1,400 lbs	"		
<u>LEATHER AND FORESTRY PRODUCTS</u>							
1. GOVERNMENT HANDICRAFT TRAINING CENTER	Cottage (Public Sector)	Local Straws and other material	Bags	500 only	50	8	Local
			Hats	400 "			
			Mats	400 "			
			Plaques	100 "			
			Dolls	200 "			
2. INDUSTRIAL WORKSHOP FOR THE BLIND	Cottage	Seagrass	Mats	n.a.	n.a.	11	Local
		Lumber	Baskets	"			
		Local Straws	Stools	"			
			Chairs	"			
<u>OTHERS</u>							
1. ANTIGUA SUGAR INDUSTRY CORPORATION	Commercial (State Enterprise)	Sugar cane	Raw sugar	246 tons	8	132	Local
			Molasses	35,000 gals				18

cont'd...

Table 1 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
2. ANTIGUA DISTILLERY LTD.	Commercial	Molasses	Rum	up to 180,000 gals*	72	35	Local
			Alcohol	" 1,800 "	n.a.		CARICOM
			Bay Rum	600	n.a.		U.S.A., Europe
3. CENTRAL COTTON STATION	Commercial (Public Sector)	Cotton Seed	Lint	3,000 lbs.	75	16	Local, CARICOM
			Cotton seeds	7,000 lbs	75		Europe

* Imperial proof gallon.

Table 2

AGRO-PROCESSING ACTIVITIES (1984)

(DOMINICA)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
FOOD PROCESSORS							
1. ANDREA LE BLANC	Home	Banana Guava Mango Tangerine Grapefruit Pomerac Mammy Apple Sorrel Passion Fruit Pineapple	Local Fruit Wines	500 gals	60	4	Local
2. KENNEDY'S PUNCH PRODUCTION	Home	Passion Fruit Coconut	Passion Fruit Peanut and Coconut Punch	500 gals	25	2	Local
3. CARIBBEAN CANDIES	Home	Orange Grapefruit Paw Paw Passion Fruit	Candied Fruit) Peel, Mixed) Peel, Candies)	1,600 lbs	50	2	Local
4. KARL'S HOT SAUCE	Home	Pepper Thyme	Hot Pepper Sauce	48 gals	100	1	Local
5. BANANA BINCH	Home	Bananas	Banana Chips	600 lbs	50	4	Local
6. V.A. SEVERIN	Home		Honey	10 gals	-	3	Local
7. DOMINICA AGRO INDUSTRIES LTD.	Cottage	Limes	Lime Oil Lime Juice Concentrate	6,000 lbs 2,114 gals	20 20	14	CARICOM U.K. CANADA

Table 2 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
8. PARRY W. BELLOT CO. LTD.	Cottage	Peppers Passion Fruit Limes Paw Paw Guava Cocoa Beans	Pepper Sauce Citrus Juices Jams and Jellies Drinking Chocolate	39,630 gals 23,778 gals 15,435 lbs 6,615 lbs	50 60 50 30	28	Local CARICOM
9. DOMINICA FOOD INDUSTRIES	Cottage	Sorrel	Dehydrated Sorrel	50,000 lbs	50	28	U.K., Local CARICOM
10. POINT MICHIE WOMAN'S DEVELOPMENT COMMITTEE	Cottage (Co-operative)	Bananas	Banana Raisins	4,000 lbs	100	3	Local
<u>OTHERS</u>							
1. FOND COLE OIL REFINERY	Cottage	Copra	Cooking Oil Soap Animal Feed	2,400 gals 6,000 lbs 9,000 lbs	n.a.	3	Local
2. DOMINICA ESSENTIAL OILS AND SPICES CO-OPERATIVE SOCIETY LTD.	Cottage (Co-operative)	Bay Leaf	Bay Oil	4,500 gals	40	5	U.S.A. Europe, Canada
3. PETITE SAVANNE BAY OIL PRODUCERS CO-OPERATIVE SOCIETY LTD.	Cottage (Co-operative)	Bay Leaf	Bay Oil	30 tons	60	14	U.S.A., Local CARICOM Europe
4. DOMINICA COCONUTS PRODUCTS LTD.	Commercial	Copra	Refined Oil Edible Oil Laundry Soap Toilet Soap Copra Meal	1,658 tons 787 tons 4,724 tons 1,968 tons 2,657 tons	n.a. n.a. 80 80 50	160	Local CARICOM U.S.A. Other Caribbean
5. WINDWARD ISLANDS ALOE LTD.	Cottage	None	Raw Aloe Gel	n.a.	n.a.	21	CARICOM, USA, Europe
6. SHILLINGFORD ESTATES LTD.	Commercial	Sugar cane	Rum	24,000 gals	25	n.a.	Local USA

Table 3

AGRO-PROCESSING ACTIVITIES (1984)

(GRENADA)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
FOOD PROCESSORS							
1. JAMES STEVENS	Home	Guava	Guava Cheese	n.a.	n.a.	1	Local
2. PHILLIS SCOTT	Home	Guava	Guava Cheese	500 lbs	100	3	Local
3. RUBY GARAGAN	Home	Cocoa Bean	Chocolate Roll	800 lbs	100	2	Local
4. MINTUDE PHILLIP	Home	Peppers	Pepper Sauce	85 gals	n.a.	1	Local
5. EDWARDS CALLENDER	Home	Peppers	Pepper Sauce	90 gals	n.a.	3	Local
6. BERNADETTE FRANCIS	Home	Breadfruits	Breadfruit and White Potato Chips	300 lbs	80	5	Local
7. EMELDA DEGALE	Home	Guava	Guava Cheese	2,500 lbs	100	3	Local
8. MARYLON CAMPBELL	Home	Guava	Guava Cheese	300 lbs	n.a.	2	Local
9. REGINA NYACK	Home	Limes	Lime Juice	100 gals	n.a.	4	Local
10. JENNETTE COMBS	Home	Guava	Guava Cheese	600 lbs	40	3	Local
11. H.M. BHOLA	Home	Guava Peppers Grape	Bottled Guava Bottled Pepper Bottled Grape	2,000 lbs 500 lbs 1,000 lbs	n.a.	3	Local
12. GRENADA FOODS LTD.	Cottage	Peppers	Pepper Sauce Tomato Ketchup	10,000 lbs 10,000 lbs	n.a.	8	Local
13. GRENADA COFFEE PLANT	Cottage (Public Sector)	Coffee Beans	Ground Coffee	15,000 lbs	20	11	Local

cont'd...

Table 3 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
14. GRENADA HOME INDUSTRIES	Cottage	Nutmeg Pods Oranges	Nutmeg Jam Orange Marmalade	2,500 lbs 5,500 lbs	100 n.a.	3	Local Europe
15. GREEN FRUIT WOMEN'S CO-OP.	Cottage (Co-operative)	Damsel Paw Paw Condicion	Dehydrated Fruit	10,700 lbs	35	13	Local CARICOM
16. GOV'T SPILE LAB, TANTEEN	Pilot Plant (Public Sector)	Cinnamon Clove	Cinnamon Clove	n.a.	n.a.	n.a.	Local
<u>OTHERS</u>							
1. GRENADA DISTILLERS LTD.	Commercial	Sugar cane	White Rum	20,000 gals	29	n.a. ^{1/}	Local
2. GRENADA AGRO INDUSTRIES	Commercial	None	Wheat Flour Animal Feed	96,000 cwt 30,000 cwt	n.a.	35	Local CARICOM
3. THE TEMPE MFG. CO. LTD.	Commercial	Copra	Coconut Oil Coconut Meal Laundry Soap Liquid Detergent	60,000 gals 40,000 lbs 250,000 lbs 5,000 gals	75 50 80 50	18	Local CARICOM

^{1/} 75 full time and 25 part time employees for production of sugar cane and rum distillation.

Table 4
AGRO-PROCESSING ACTIVITIES (1984)
(MONTSERRAT)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
FOOD PROCESSORS							
1. ERNEST CASSELL WEBBS	Home	Pepper Paw Paw Onion Guava Mango	Pepper Sauce Guava Jelly Guava Cheese Mango Chutney	200 gals 150 lbs 30 lbs 100 lbs	60 30 50	3	Local CARICOM
2. CATHERINE PETERS	Home	Guava Orange Mango	Guava Jelly Guava Cheese Mango Chutney Preserved Guava	100 lbs 100 lbs 50 lbs 10 lbs	30 30 30 40	1	Local
3. SARAH JOSEPH	Home	Guava Oranges Limes	Guava Cheese Guava Jelly Marmalade	50 lbs 40 lbs 40 lbs	30 30 20	1	Local
4. THERESA PETERSON	Home	Banana Coconut Limes Pineapple Passion Fruit Sea Grapes Mango Guava	Honey Cakes and Pies Jams Jellies Chutneys Steak Sauce	80 lbs n.a. n.a. n.a. n.a. n.a. n.a. n.a.	n.a.	1	Local
5. NORMANS	Home	Local Meat	Ground Beef Hamburgers Pork Chicken	n.a.	25	4	Local
6. EMERALD DISTILLERS (Charles Allen)	Cottage	Limes Bay Leaf	Lime Juice Lime Oil Bay Rum Bay Oil	5,000 gals 40 gals 6,000 gals 800 gals	3 100 100 100	7	USA, CARICOM Caribbean, Other Local

cont'd....

Table 4 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
7. MONTERRAT INDUSTRIAL ENTERPRISES LTD.	Cottage (Public Sector)	Hot Pepper	Hot Pepper Paste	50,000 lbs	20	10	Local CARICOM
8. WILLIAM C. TUITT	Home	Bees	Honey	25 gals	-	1	Local, Other Caribbean
9. MONTERRAT BEEKEEPING ASSOCIATION	(Co-operative)	Bees	Honey	12,000 lbs	-	25 members	Local, Caribbean, USA
10. KONRAD HOLLATZ	Home	Bees	Honey	3,500 lbs	-	1	Local Caribbean
<u>LEATHER AND FORESTRY PRODUCTS</u>							
1. EMERALD ISLE LEATHER WORKS LTD.	Cottage	Cow Hides Goat and Sheep Skins	Leather (Finished)	1,050 hides per annum	50	8	Local CARICOM
2. LEATHERCRAFT	Cottage (Co-operative)	Local hides and skins	Sandals Shoes Bags Belts Wallets	n.a.	n.a.	3	Local
3. JOHN IRISH	Home	Cedar Local supplies of Lumber	Chairs Tables Craft Products	n.a.	n.a.	2	Local
4. SWEENEY'S FURNITURE	Home	Local supplies of Lumber	Furniture	100 pieces	50	3	Local
5. FOREST PRODUCTS	Cottage	Mahogany Cedar	Doors Mouldings Furniture	n.a.	n.a.	14	Local Caribbean

cont'd...

Table 4 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
6. THOMAS EDWARDS	Cottage	Bamboo Twigs Vines Grasses	Baskets: Bread Baskets: Laundry Fish Pots	4 20 10	n.a.	1	Local
7. WESTONAVE PRODUCTS	Cottage	Mahogany	Furniture: Domestic Commercial	n.a.	25 12	5	Local
8. FELIX AWVDO	Cottage	Mahogany Cedar	Furniture	n.a.	n.a.	6	Local
<u>OTHERS</u>							
1. MONTERRAT SEA-ISLAND COTTON LTD.	Commercial (State Enterprise)	Long-Staple Cotton	Bags) Scarves) Stoles) Napkins) Blankets) Placemats)	2,500 lbs per annum	50	77 (70 part-time workers)	Local, Caribbean U.S.A. Canada
2. TRADERS LTD.	Commercial	Flavours (fruit)	Aerated Beverages	30,000 cases	50	15	Local

Table 5

AGRO-PROCESSING ACTIVITIES (1984)

(SAINT CHRISTOPHER/NEVIS)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
<u>FOOD PROCESSORS</u>							
1. B. BILLOT	Home	Guava Tamarind Gooseberry Peppers	Guava Jam Guava Jelly Pepper Sauce Gooseberry Jam Tamarind Jam	n.a. " " " "	n.a.	1	Local
2. ICILMA WELSH	Home	Guava	Guava Jam Guava Jelly Guava Cheese	300 lbs 250 lbs 200 lbs	80 80 40	3	Local
3. RENFORD LAPSAE	Home	Peppers, hot	Pepper Sauce	300 gals	60	1	Local, Dutch Virgin Islands
4. EMILY GOVIA	Home	Peppers Guava	Guava Jam Guava Jelly Guava Cheese Pepper Sauce	600 lbs 600 lbs 400 lbs 40 gals	50 50 50 25	1 (12 part-time when needed)	Local
5. CLARITA PHIPPS	Home	Guava	Guava Jelly Guava Cheese	400 lbs 600 lbs	50 50	1	Local
6. ELAINE OSBORNE	Home	Peppers Guava	Pepper Sauce Guava Jam Guava Jelly	30 gals 200 lbs 300 lbs	40 60 60	2	Local
7. MRS. MACLEAN	Home	Mango	Mango Chutney	40 gals	40	1	Local
8. MARGARET PATRICK (Dieppe Bay)	Cottage (Co-operative)	Pineapple Mango Guava Paw Paw Peppers	Pepper Sauce Jams Jellies Guava Cheese	25 gals 600 lbs 450 lbs 300 lbs	25 70 70 50	8 (on a Part-time basis)	Local

cont'd...

Table 5 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
9. CARIBBEAN CONFECTIONS	Cottage	Guava Peppers Oranges Mango Egg Plant	Guava Jam Guava Jelly Marmalade Chutney Relish Pepper Sauce	700 lbs 700 lbs 1,000 lbs 600 lbs 200 lbs	n.a.	7	Local CARICOM
10. CARIBBEAN HONEY CO.LTD.	Cottage	-	Honey Pollen Beeswax	2,000 gals 250 lbs	n.a.	8	Local Caribbean
<u>OTHERS</u>							
1. ST.KITTS SUGAR MANUFACTURING CO.	Commercial	Sugar Cane	Sugar, raw Molasses	35,000 tons 10,000 tons	70 70	528 (plus 274 for 6 mtHs)	Europe, USA, CARICOM, Local

Table 6

AGRO-PROCESSING ACTIVITIES (1984)

(SAINT LUCIA)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
<u>FOOD PROCESSORS</u>							
1. MRS. COX	Home	Pepper Guava	Pepper Sauce Guava Jelly	600 gals 600 lbs	20 20	3	Local
2. E'S DELI	Home	Guava Orange Golden Apple Pepper	Guava Jelly Guava Jam Pepper Sauce Candied Peel Prickly Pepper Marmalade	600 lbs 600 lbs 50 lbs 50 lbs 100 lbs 200 lbs	60 60 30 40 50 60	4	Local
3. CANA WEEKES INDUSTRIES LTD.	Cottage	Plantain Guava Other Fruits	Plantain Chips Guava Nectar	1,000 lbs 1,000 gals	20 15	16	Local
4. C.F. FRICO AND CO. LTD.	Cottage	Peanuts	Peanut Butter	27,000 lbs	50	7	Local
5. AGRO INDUSTRIES	Cottage	Ackee	Canned Ackee Tomato Ketchup	50,000 lbs 250,000 lbs	50 20	5	Local Canada
6. AUNT LUCIA'S	Cottage (Co-operative)	Guava Golden Apple Mango Hot Pepper	Guava Jelly Apple Jam Mango Jelly Pepper Sauce	n.a. " " "	3		
7. PRODUCE CHEMIST LABORATORY	Pilot	NOT CURRENTLY PROCESSING					
<u>OTHERS</u>							
1. COPRA MANUFACTURERS LTD.	Commercial	Copra	Edible Oil Margarine Soap Plastic Bottles	1 million gals 600 tons 1.5 million lbs 3 million	50 33 75 75	150	Local CARICOM

Table 7

AGRO-PROCESSING ACTIVITIES (1984)

(SAINT VINCENT AND THE GRENADINES)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
<u>FOOD PROCESSORS</u>							
1. UNIQUE FOOD PROCESSORS	Home	Peppers Paw Paw Mangoes	Pepper Sauce	1,800 gals	n.a.	4	Local U.S.A.
2. ARISTO CRISP	Home	Peanuts	Salted Peanuts	Makes to order	n.a.	4	Local
3. R AND N ENTERPRISE	Home	Chive Peppers Spices	Seasoning Mix	240 gals	50	3	Local
4. TOPS	Home	Peppers Limes Guavas Sorrel Golden Apples	Pepper Sauce Guava Jelly Seasoning Sorrel Drink	Makes to order " " " " " " 14 gals	n.a.	4	Local
5. POOL'S PLANTAIN CHIPS	Home	Plantains	Plantains Chips	1,800 lbs	100	2	Local
6. ST. VINCENT APIARIES	Home	-	Honey Wax	5,000 lbs 40 lbs	- -	1	Local
7. SNACK - ITT	Cottage	Plantains	Plantain Chips	6,000 lbs	75	8	Local CARICOM
8. ORANGE HILL ESTATES LTD.	Cottage	Passion Fruits Grapefruits Limes Oranges Mangoes	Passion Fruits Grapefruit and Lime Juices Lime Jelly Marmalades Mango Chutney	3,000 lbs	50	14	Local CARICOM Virgin Islands

cont'd...

Table 7 (cont'd)

Name of Company	Type of Operations	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
9. MOUNT BEUTICK PLANTATIONS LTD.	Cottage	Arrowroot	Arrowroot starch	300,000 lbs	38	Varies	Local
10. DAVY'S	Cottage	Feed Flour Eggs	Macaroni Spaghetti	10,080 lbs 6,720 lbs	100	3	Local
11. FRED DE NOBRIGA LTD.	Cottage	Local Fruit Flavours	Ice Cream	13,500 gals	100	18	Local
12. AGRO-LABS	Pilot Plant (Public Sector)	Sorrel Guevas Golden Apples Soursop	Dried Sorrel) Syrup and Jelly) Mango and) Golden Apple Jam) Soursop Drink) and Pina Colada)	Operation of Agro-lab suspended	n.a. " " " "	14	Local
<u>OTHERS</u>							
1. ST. VINCENT SUGAR INDUSTRY CO. LTD.	Commercial	Sugar Cane	Sugar, raw Molasses	1,200 tons 70,000 gals	n.a.	317	Local
2. ARNOS VALE OIL INDUSTRIES (1979) LTD.	Commercial	Copra	Refined Coconut Oil Crude Coconut Oil Coconut Meal Soap, laundry	108,000 gals) 67,500 gals) 580 tons 11,700 gals	36 36 36 36	33	Local CARICOM
3. ST. VINCENT DISTILLERS	Commercial	Molasses	Rum	110,000 proof gals	100	24	Local
4. EAST CARIBBEAN FEEDS LTD.	Commercial	Millfeed	Animal and Poultry Feeds	4,000 tons	15	17	Local

cont'd.....

Table 7 (cont'd)

Name of Company	Type of Operation	Raw Materials (Local)	Product Range	Actual Production (Annual)	% Plant Capacity Utilization	Work Force	Markets
5. EAST CARIBBEAN FLOUR MILL	Commercial	None	Bag Flour	420,000/100 lbs	80	109	Local
			Mill Feed	110,000/100 lbs	80		CARICOM
			Package Flour	26,000/50 lbs	65		Other Caribbean
			Semolina	1,200/100 lbs	n.a.		
6. DIAMOND DAIRY	Commercial (Public Sector)	n.a.	Milk, Plain	225,000 gals	30	63	Local
			Milk, Flavoured	20,000 gals	30		CARICOM
			Fruit Juices	60,000 gals	30		

NUMBER OF UNITS - BY TYPE OF OPERATION

	Home Industry	Cottage Industry	Commercial	Pilot	Total
Antigua and Barbuda	4	4	4	1	13
Dominica	6	5	-	-	11
Grenada	11	4	3	1	19
Montserrat	10	8	2	-	20
Saint Christopher/Nevis	7	3	1	-	11
Saint Lucia	2	4	1	1	8
Saint Vincent and the Grenadines	6	7	6	1	20
	46	35	17	4	102

Table 9

NUMBER OF UNITS - BY ACTIVITY

	Food Processors	Leather and Forestry Products	Others	Total
Antigua and Barbuda	8	2	3	13
Dominica	10	-	1	11
Grenada	16	-	3	19
Montserrat	10	8	2	20
Saint Christopher/Nevis	10	-	1	11
Saint Lucia	7	-	1	8
Saint Vincent and the Grenadines	12	2	6	20
	73	12	17	102

Table 10

Raw materials used and products
most commonly produced

<u>Raw Materials</u>	<u>Finished Product</u>
1. Sugar cane	Raw sugar, rum, alcohol
2. Molasses	Rum, alcohol
3. Coconuts	Raw and refined oil Coconut meal Soaps Pina Colada Coir
4. Citrus	Fruit juices Marmalade Peel
5. Arrowroot	Arrowroot starch
6. Pineapple	Jam
7. Guava	Jam, drink
8. Soursop	Drink
9. Mango	Drink, jam, chutney
10. Passion fruit	Drink, syrup
11. Tamarind	Drink, syrup
12. Golden apple	Drink, jam
13. Ginger	Jam (ingredient)
14. West Indian cherry	Jelly, drink
15. Carambola	Drink
16. Sorrel	Drink, syrup, dried
17. Banana/Plantain	Banana 'raisin', banana chips
18. Peanuts	Roasted nuts, peanut butter ^{1/}

^{1/} Imported peanuts used to make peanut butter.

Raw Materials

19. Nutmegs
20. Cinnamon
21. Tomato
22. Ackee
23. Pepper, hot
24. Vegetables
25. Honey
26. Bay leaf
27. Patchouli
28. Aloe
29. Alcohol
30. Meats
31. Milk
32. Cotton
33. Hides
34. Leather
35. Wheat
36. Sugar
37. Straw

Finished Product

- Oil, jam
- Ground cinnamon
- Ketchup
- Canned ackee
- Pepper mash, pepper sauce
- Pickles
- Honey
- Bay oil, bay rum
- Patchouli oil
- Aloe extract
- Wines, vodka, gin
- Bacon, ham, pickled meats,
sausages
- Ice Cream, flavoured milk, etc.
- Cotton lint, fabric, garments
- Leather
- Sandals, belts, bags, wallets
- Biscuits, animal feeds,
wheat flour
- Gravy browning
- Hats, bags, mats, dolls.

Table 11

Type and Quantity of Processed Commodities Produced by each Island (1984)

	Unit	Antigua and Barbuda	Dominica	Grenada	Montserrat	Saint Christopher/ Nevis	Saint Lucia	Saint Vincent and the Grenadines	Total
<u>Jams, jellies</u>									
Citrus marmalade	lb.	4,000	...	5,500	40	8,000	200	...	10,780
Guava jelly	lb.	1,620	...	...	290	4,500	1,800	5,200	13,410
Cherry	lb.	500	...	...	...	...	...	100	600
Mango	lb.	925	...	...	...	600	...	750	2,275
Nutmeg		...	...	2,500	...	...	...	...	2,500
Pineapple	lb.	7,300	...	...	...	...	...	...	7,300
Mixed	lb.	...	15,500	...	...	...	...	...	15,500
Guava cheese	lb.	...	...	3,900	180	1,500	...	...	5,580
Bottled guava	lb.	...	2,000	...	...	...	...	...	2,000
Tamarind balls	lb.	2,500	...	...	...	...	...	...	2,500
Ginger/Golden Apple jam	lb.	...	...	...	...	...	400	...	400
<u>Fruit juices, syrups</u>									
Carambola	gals.	45	...	...	...	...	...	...	45
Citrus, mixed	gals.	...	...	...	...	...	...	300	300
Guava	gals.	...	...	...	...	...	1,000	...	1,000
Passion fruit	gals.	...	500	...	...	...	...	...	500
Lime juice	gals.	140	...	...	...	...	...	...	140
Lime juice concentrate	gals.	...	25,914	...	...	...	...	...	25,914
Sorrel	gals.	...	...	...	...	...	...	145	145
Reconstituted juices	gals.	...	...	...	...	...	...	60,000	60,000
Soursop	gals.	...	...	...	...	...	...	130	130
Mango	gals.	...	...	...	...	...	...	100	100
<u>Dried fruit</u>									
Mixed peel	lb.	...	1,600	10,700	...	...	...	...	12,300
Banana raisins	lb.	...	4,000	...	...	...	...	...	4,000
Dried sorrel	lb.	...	50,000	...	...	...	...	1,850	51,850
Plantain/Banana chips	lb.	...	600	...	...	...	1,000	7,800	9,400
Breadfruit chips	lb.	...	300	...	...	...	...	...	300

cont'd....

Unit	Antigua and Barbuda	Dominica	Grenada	Montserrat	Saint Christopher/ Nevis	Saint Lucia	Saint Vincent and the Grenadines	Total
<u>Beverages</u>								
Wines	gals.	50	500					550
Crema punch	gals.	500						500
Ground coffee	lb.		15,000					15,000
Chocolate ^{1/}	lb.		6,600	800				7,400
Pina Colada ^{1/}	gals.						260	260
<u>Spices and Condiments</u>								
Hot pepper sauce	gals.	1,370	39,650	175	200	125	650	43,970
Pepper mashed concentrate	gals.				50,000		15,000	65,000
Tomato ketchup	gals.	290		...				290
Mango chutney	lb.				150			1,350
Pickles	lb.					200		200
Bottled peppers	lb.		500				...	500
Food seasoning	gals.						240	240
Gravy browning	gals.						300	300
<u>Coconut products</u>								
Raw oil	'000 gals. ^{2/}			60			67.5	127.5
Refined oil	'000 gals. ^{2/}		406				108	514
Coconut meal	tons		2,660				580	3,240
Laundry soap	tons		4,727	112		670		5,509
Toilet soap	tons		1,968					1,968
Liquid detergent	gals.			5,000			11,700	16,700
Edible oil	'000 gals.		195		1,000			1,195
Margarine	tons				...		600	600
Peanut butter	lb.						27,000	27,000

cont'd....

	Unit	Antigua and Barbuda	Dominica	Grenada	Montserrat	Saint Christopher/ Nevis	Saint Lucia	Saint Vincent and the Grenadines	Total
<u>Essential oils</u>									
Bay oil	tons		30		3.6				33.6
Lime oil	lb.		6,000	400	40				6,440
Bay rum	gals.	600			6,000				6,600
<u>Arrowroot</u>	lb.							300,000	300,000
<u>Sugar cane products</u>									
Raw sugar	tons	240		200		35,000		1,200	36,640
Molasses	'000 gals.	35		...		2,450		70	2,555
Rum	'000 gals. 3/	180	24	20		...		110	334
Alcohol	gals.	1,800							
<u>Processed meats</u>									
Processed beef	lb.	18,500							18,500
Pickled pork	lb.	10,500							10,500
Pickled chicken	lb.	630							630
Hams	lb.	1,300							1,300
Honey	lb.	3,000	150	...	5,155	30,000		8,000	46,305
Pollen	lb.					250			250
Beeswax	lb.	100				...		40	140
Canned Ackee	lb.						50,000		50,000
<u>Wheat products</u>									
Wheat flour	tons			4,800			24,290		29,090
Animal feed	tons			1,500			4,00		5,500
Biscuits	lb.	...							...
Macaroni	lb.						10,800		10,800
Spaghetti	lb.						6,720		6,720

cont'd...

	Unit	Antigua and Barbuda	Dominica	Grenada	Montserrat	Saint Christopher/ Nevis	Saint Lucia	Saint Vincent and the Grenadines	Total
<u>Dairy products</u>									
Reconstituted milk	gals.	...		...				245,000	245,000
Ice cream	gals.	...		...	...			...
<u>Hides and skins</u>									
Cattle, goat, sheep	No.				1,050				1,050
<u>Straw products</u>									
Bags	No.	500	...	...	...		...	...
Hats	No.	400	...	...	...		...	...
Mats	No.	400	...	...	...		...	...
Plaques	No.	100	...	...	...		...	...
Dolls	No.	200	...	...	...		...	...

tons = long tons

... = Production data not obtained.

1/ No alcohol content.

2/ Approximately 245 gallons = one ton oil.

3/ Proof gallons.

Table 12

Number of Persons Employed in Agro-Industrial
Activities in the OECS (1984) 1/

Island	Number of Persons Employed in:							Total
	Sugar In- dustry	Copra In- dustry	Milling of Wheat Flour	Cotton In- dustry	Alcohol Distil- lation	Food Proces- sing	Other	
Antigua and Barbuda	132	-	-	16	35	75	19	277
Dominica	-	163	-	-	n.a.	75	54	292
Grenada	-	18	35	-	100 ^{2/}	55	-	208
Montserrat	-	-	-	77	-	69	42	188
Saint Christopher/ Nevis	802	-	-	-	-	45	-	847
Saint Lucia	-	150	-	-	-	35	-	185
Saint Vincent and the Grenadines	317	33	126	-	124	138	-	738
Total	1,251	364	161	93	259	492	115	2,735

1/ Includes persons who are seasonal and part-time.

2/ 75 full-time and 25 part-time employed in production of sugar cane and distillation of rum.

UNITED NATIONS
ECONOMIC COMMISSION FOR LATIN AMERICA

SURVEY OF AGRO-INDUSTRIAL ACTIVITIES
IN THE CARIBBEAN

1. COUNTRY:

2. NAME OF COMPANY:

3. ADDRESS:

4. STATUS:

Public Sector

Limited Liability Co.

Private Co.

Association

Co-operative

5. YEAR ESTABLISHED:

6. NUMBER OF EMPLOYEES:

<u>CATEGORY</u>	<u>FULL TIME</u>	<u>PART TIME</u> (No. Months/Yr)
-----------------	------------------	-------------------------------------

Technical/Professional

Other

7. INDUSTRIAL PLANT FACILITIES:

(Brief description e.g. expeller, deodoriser, bottling, etc.)

8. TYPES AND SOURCES OF RAW MATERIALS USED:

	<u>TYPE</u>	<u>LOCAL</u>	<u>IMPORTS</u>
i.			
ii.			
iii.			
iv.			
v.			
vi.			
vii.			
viii.			

9. PRODUCTS:

	<u>NAME</u> (Commodity)	<u>ANNUAL PRODUCTION</u>	<u>PLANT CAPACITY</u>
i.			
ii.			
iii.			
iv.			
v.			
vi.			

10. MARKETS:

Local	<input type="checkbox"/>
CARICOM	<input type="checkbox"/>
Caribbean	<input type="checkbox"/>
Latin America	<input type="checkbox"/>
U.S.A	<input type="checkbox"/>
Canada	<input type="checkbox"/>
Europe	<input type="checkbox"/>
Other	<input type="checkbox"/>

(Please rank in order of importance, 1 being the most important)

11. MARKET CONDITIONS:

- Declining
- Stable
- Expanding slowly
- rapidly

12. CONSTRAINTS/PRODUCTION PROBLEMS:

13. GRAIN DRYING FACILITIES:

14. STORAGE FACILITIES:

(e.g. type, capacity of storage facilities for bulk grain, sugar, molasses, frozen meats, chilled vegetables, etc.)

15. OTHER RELEVANT INFORMATION:

Please return to:

UNITED NATIONS
Economic Commission for Latin America and the Caribbean
P.O Box 1113
Port-of-Spain
TRINIDAD, W.I