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ECONOMIC COMMISSION FOR LATIN AMERICA  
Office for the Caribbean

REPORT OF SURVEY IN CDCC COUNTRIES  
REGARDING COORDINATION THROUGH  
PRODUCERS AND/OR EXPORTERS ASSOCIATIONS  
OF AGRICULTURAL PRODUCTS

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## PREFACE

In compliance with the requisite conditions defined in:

1. the last sentence of Section B The Agricultural Sector of Chapter III of the first CDCC Work Programme "Promoting and organizing: (i) the sub-region production and industrial processing of crops; (ii) associations of producers/exporters for the sharing of experiences and promotion of reciprocal co-operation in the various aspects of the marketing of agricultural products, without discounting the possibility of exporting as a group to third countries";
2. the first mandate of the Work Programme of CDCC II under the same sector: "As a follow-up to the publication of the Directory of Associations of Producers, Dealers and Exporters of Agricultural and Livestock Products of the Caribbean Countries, an attempt to bring those Associations together and facilitate mutual exchanges will be initiated;
3. the adoption at CDCC III of the joint UNCTAD/UNAPEC/CDCC proposal for the development and strengthening of contacts and coordination of activities of Producers and/or Exporters Associations of agricultural products in the CDCC area;

UNCTAD made available to the CDCC Secretariat the service of a consultant to carry out a preliminary study for the establishment and functioning of Regional Producers and/or Exporters Associations of agricultural products. The results of the survey organized in the CDCC member countries during August/September 1978 are contained in the present report along with relevant recommendations and action programmes.

It should be noted that though during the mission's visits, the consultant was accompanied by Mr. R. Dookie - Research Assistant at UN ECLA Office for the Caribbean - to Guyana and Suriname, and

by Mr. L. Smith - Senior Economist, UN ECLA Office for the Caribbean - to Antigua, Montserrat, St. Kitts and the Dominican Republic, respectively, both Messrs. Smith and Dookie are not responsible for what is presented in this report.

The logistic help received from the directorate and staff of the UN ECLA Office for the Caribbean in the organization of the visits and the final preparation of this report is also acknowledged.

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N.B: It should be mentioned that the supporting documents indicated in some of the country notes have been retained at the Secretariat for future reference.



## INTRODUCTION

The present report contains the findings of a mission which visited all the member countries of the Caribbean Development and Co-operation Committee. The visits extended for a period of forty-seven days between 13 August and 8 October 1978. Sixteen countries were visited and about one hundred interviews were held with governmental officials and representatives of private associations.

The original objectives of the mission were to carry out a study for the establishment of regional producers/exporters' associations. The studies were to be made on the nature, organization, and functioning of associations dealing with the following products:

- (a) Grain products including legumes;
- (b) Timber;
- (c) Oils and Fats;
- (d) Fish and Crustaceans;
- (e) Livestock Products:
  - i) Meat (beef and Pork)
  - ii) Dairy products

It should be noted that the objective of studying the possibility of forming regional producers/exporters associations was extended into two additional aspects. First, during the first interviews - held in Trinidad and Tobago - the mission realized that the area of co-ordination and co-operation in the agriculture livestock sector had to be included because of its direct inter-relation with the promotion of associations of producers and exporters. Second, the original agenda of five items was extended to other crops because of a 'natural' inclusion during interviews. It is well known that, particularly in the English-speaking Caribbean countries, mixed farming is practiced. Therefore, it was quite often found that certain crops were grown by the same group of farmers, members of some association; in addition to this, in some small countries, the original items represented no significance in the export activity, although it was found that there existed some associations for different crops.

In addition to the previous two points, it was thought, prior to the actual visits, that regional associations such as the Windward

Island Banana Growers' Association (WINBAN) and the British Caribbean Citrus Association (BCCA) were worth visiting for the relevant experience which could have been obtained in these regional associations.

Therefore, apart from the original five items in the agenda, other crops such as vegetables and fruits, cocoa, coffee, ground provisions and others were added in some countries.

No systematic questionnaire was applied during the interviews, particularly due to the heterogeneity of the interviewees and the variations of crops from country to country. At the same time, the gathering of documents, leaflets, bulletins, statistical data and other relevant information on associations and exports of agricultural produce in general was undertaken.

It should be emphasized that in every country, the idea of regional co-operation and eventual association was welcomed. Nevertheless, in the case of Barbados and Jamaica, it was felt a rather generalized sceptical attitude from the interviewees about the value of the exercise. In Barbados, for instance, it was explicitly pointed out the sometimes sterile consequences of visits and experts' reports of this kind. In Jamaica, on the other hand, it was stated the frustration caused by the lack of "follow-up" of experts' recommendations. In both countries, a general attitude of tiredness was sensed from governmental officials and private representatives about visits and meetings with consultants, experts or other representatives of international agencies.

It is worth saying that during the mission it was actually experienced a total lack of co-ordination among international agencies. On four occasions, the mission encountered with representatives of the ITC-UNCTAD (International Trade Centre), working on similar grounds, interviewing the same people and without knowing about each other's projects. On two occasions this kind of lack of co-ordination went as far as having to meet an ITC representative when actually leaving representatives of governmental institutions at the lobbies. It is actually very embarrassing for the interviewer and disgusting for the interviewee, to be received by officials who have just been questioned on the same by a consultant (or another international

agency official) during the same day.

In addition to difficulties found during the interviews, it should be noted that the institutional framework concerning producers/exporters associations in the visited countries is extremely heterogenous.

The English-speaking countries, for instance, can be characterized by the presence of State-controlled boards or bodies which have been inherited from the colonial past. In other countries, such as Suriname, Haiti, Dominican Republic and Belize, it was found a rather well established "full market system" in which associations did not exist or were very weak. It was very often found that producers are not the same people as exporters. Foreign trade in these countries is performed by dealers who act as middle men between the local producers and the foreign agent. Associations of exporters, therefore, were either non-existent or unrepresented overall.

At the other extreme, in countries like Cuba, and increasingly in Jamaica and Guyana, the State has a fundamental role to play in the promotion and control of exports. This characteristic has meant that these countries are tending to give priority to bilateral agreements regarding foreign trade.

Due to the various and different features of each country's institutional framework, this report has been divided into three parts. The first part contains the recommendations and the proposed plan of action for the establishment of regional producers/exporters associations. The second part consists of a summary of the findings according to products, and finally, the third part contains a description of the findings according to countries.



## RECOMMENDATIONS FOR ACTION PROGRAMMES

### General Recommendations

(1) There are two sectors where a regional effort at the level of the CDCC Secretariat should be extended. First, a greater effort is necessary in the co-ordination of the Research and Development which is being made, generally in Agriculture and Livestock. Cuba, Haiti, Dominican Republic and Suriname should be included or, at least, kept informed of the research effort done at CARDI, the University of the West Indies, CARIRI and the like. Similarly, the Research and Development effort done particularly in Cuba and Dominican Republic should be made available to the rest of the CDCC members.

It is therefore recommended: the strengthening of the co-ordinating effort at the CDCC Secretariat on Research and Development in and for the region; the organization of periodical meetings of Research and Development institutions in the region; the eventual publication or circulation of information among Research and Development centres in the region on findings, research in progress and experimental development programmes under implementation.

(2) Second, a stronger encouragement should be given to training programmes at various levels in the areas of: Agricultural Science and Technology, Livestock Science and Marine Biology and Fishing Techniques. It is strongly recommended the calling of a meeting of CDCC countries institutions to co-ordinate training programmes according to sectors. Marine Biology and Fishing Techniques should be incorporated at the university level. At the same time, food processing technology should be incorporated as a subject area for training purposes at the technical and university levels.

(3) It is recommended also, the realization of studies aiming at the training of technical staff for the improved management of livestock. It is worth noticing that training programmes may easily be connected with the already existing associations and co-operatives to train both associations' or co-operatives' members and other interested people.

(4) It is also strongly recommended a greater co-ordination of initiatives coming from international organizations aiming at the promotion and development of intra- and extra-regional trade.

Specific Recommendations

The following recommendations are proposed according to products.

(5) RICE: Due to the heterogeneity of rice producers/exporters in the region it is proposed the realization of an international meeting with the participation of representatives of the following countries: Guyana, Suriname and Belize. The meeting will have a preliminary and tentative character aiming at the following objectives:

- (a) The co-ordination and co-operation at the production levels of the participating countries. Special emphasis should be put in the co-ordination and co-operation of Research and Development of rice production.
- (b) Co-operation in information and documentation in subjects relevant to rice production.
- (c) Co-operation and sharing of information on extra-regional markets, prices and standards related to packaging, grading and shipment of the product.

The proposed meeting could be held in the course of 1979. It could be of fundamental importance, if possible, the sending of an ITC expert on rice previous to the meeting to test other areas of interest and check the already expressed willingness to meet. Eventually, other agreements on co-operation and co-ordination of joint marketing ventures may emerge from a first tentative meeting.

(6) CORN: No feasible regional gathering is foreseen in the case of corn.

(7) LEGUMES: This is dealt together with Vegetables, Fruits and Ground Provisions.

(8) TIMBER: An expert's report is recommended to be obtained prior to the calling of an international meeting with the participation of Guyana, Suriname, and Belize aiming at a Regional Timber Export Committee.

Such a committee may represent an embryonic institution attempting to:

- (i) co-ordinate and co-operate on aspects related to the production of timber;
- (ii) co-ordinate and co-operate on the performance of Research and Development on timber and forestry, in general;
- (iii) carry out feasibility studies for the joint exploitation of waste processing aiming at the production of pulp, charcoal and chemical compounds;
- (iv) exchange information about markets, prices and products.

A meeting may be called during 1979, once an expert's report furthering the findings of this mission is submitted.

(9) OILS AND FATS: No feasible regional gathering is foreseen in this sector. It is worth noticing, nevertheless, that further co-ordination and co-operation may be encouraged at CARICOM under the Oils and Fats Agreement. Co-operation among associations and processing companies may be recommended in areas such as:

- (i) Rehabilitation programmes of coconut trees; and
- (ii) Research and Development on trees and processed products.

(10) FISH AND CRUSTACEANS: No regional association is foreseen in this sector. Nevertheless, it is possible to encourage co-operation at a regional level in the following areas:

- (i) Training Centres. Already there exists in Trinidad and Tobago a training centre which may be enriched by the participation of Cuban, Guyanese and Surinamese representatives. It is thought, however, that a tentative study should be carried out on this co-operation scheme.
- (ii) As a consequence of co-operation at the training level, some co-operation schemes may come out on areas such as:

- maintenance and repairs of equipment;
- joint operations of fishing and processing.

(11) LIVESTOCK: It is not feasible for any regional association of livestock exporters. Nevertheless, it is recommended to have a tentative meeting aiming at co-operation on areas such as:

- Research and Development;
- Propagation of Breeding Stock;
- Co-operation on aspects related to feeding stuff.

Countries to participate should include: Guyana, Trinidad & Tobago, Barbados, Jamaica, Dominican Republic, Cuba and Belize.

Such a meeting could be organized under the umbrella of the University of the West Indies.

(12) POULTRY: A feasibility study should be carried out to find out the possibility of establishing in the area two or three centres for the production of fertile eggs. Possible countries with potentials for such centres are: Barbados, Trinidad & Tobago, Jamaica and Dominican Republic.

(13) FRUITS, VEGETABLES AND GROUND PROVISIONS: It is recommended to invite for a regional meeting of Marketing Corporations (Agencies) plus representatives of Cuba, Haiti, Dominican Republic and Suriname, aiming at the creation of a regional conference which may call for periodical meetings. It is suggested that this Conference (or Committee) should, at least, meet twice a year with the objective of:

- (i) Co-ordinating intra-regional trade among the member countries;
- (ii) Co-operating in the transfer of information and/or technology in areas such as: grading, packaging, labelling, quality control, shipping of perishable agricultural produce.
- (iii) Co-ordinating and co-operating at the production level by attempting:
  - joint Research and Development Programmes.
  - Joint purchasing of common inputs such as fertilizers, seeds and the like.

- eventually, joint processing of produce by starting with co-ordination and expansion of laboratories or processing plants where available.

(iv) Co-ordinating the assistance coming from international agencies attempting to improve intra-regional trade.

(14) CITRUS: Funds should be made available in the short terms (six months) for the calling of a meeting of the B.C.C.A. country members aiming at revitalizing the Regional Association. Financial Assistance may be asked from the International Trade Centre - UNCTAD, to organize such a meeting. As a consequence of that meeting the following objectives should be pursued:

- (i) To expand the B.C.C.A. to other countries of the region, in particular Cuba, Dominican Republic and Haiti;
- (ii) To re-initiate Research and Development Programmes or co-ordinate efforts with regional research centres such as CARDI;
- (iii) To expand the processing capacity for the making of concentrates and by-products of citrus, such as oils, essences, etc.
- (iv) To attempt joint ventures in the processing of fruits. Multinational firms may be encouraged in this sector.
- (v) To carry out studies aiming at sub-contracting marketing services between country members of the Regional Association.

(15) COCOA: A regional association may be attempted by inviting the already existing associations, boards and co-operatives to a meeting aiming at:

- (i) Co-ordination and co-operation at the production level, including areas such as: rehabilitation programmes, Research and Development, fermentation and drying processes and the like;
- (ii) Co-ordination and co-operation of the marketing level including such areas as: interchange of information about markets, prices, standards, etc.;

(iii) As a consequence of (i) and (ii) a subsequent joint operation at the marketing level may be attempted;

(iv) Joint efforts in the processing of beans for the making of chocolate, cocoa powder and other products, subsequently to (i) and (ii).

(16) ARROWROOT: An expert should be made available to assist the St.Vincent Arrowroot Association to:

(i) Improve its standards in the packaging, labelling, shipping of arrowroot.

(ii) Carry out marketing research to diversify destination of exports.

(iii) Perform studies aiming at extra-regional contacts between St.Vincent and other growers of arrowroot in the world.

MECHANISMS FOR IMPLEMENTATION

At the most concrete level, the implementation of the recommendations is seen as a series of meetings between interested parties which vary according to each product. In fact, the most basic initiative recommended here is the organizing of conferences which may have two different directions: 1) the coordination of activities related to production of agricultural produce; and 2) the coordination of activities related to marketing of agricultural produce. These two different aspects call for a different kind of institutionalization. The kind of problems to be considered will depend on the product and the particular type of activity - production and/or marketing - where there exists between the parties an already present willingness and conditions to associate. At the same time, the product, the type of activity to coordinate and the countries involved, determine the kind of institutions both at the local and, eventually, at the regional level which may result as integrating parts of the overall process tending to form regional producers/exporters associations.

Both production and marketing can be broken down into four functions each. At the production level the following functions can be found: i) Research and Development; ii) Information and Documentation; iii) Processing and/or joint productive operations; and iv) Training. At the marketing level, the following functions can be found: i) Market research; ii) Information and Documentation; iii) Sub-contracting or joint marketing operations; and iv) Training.

The different functions distinguished at both the production and marketing levels call for different types of institutions. If the process of institutions building is seen as a dynamic one, it could be found that functions may generate institutions. The opposite case is also possible, that is to say, an institution (or group of institutions) may be related to one function only at the beginning. It is therefore, thought that both functions and institutions interact in a way that the process of association may lead to institutions which step by step can incorporate more of the different functions described above.

The following diagram depicts that interaction:

ACTIVITIES AND RELATED INSTITUTIONAL LEVELS.

- |    |   |   |
|----|---|---|
| 1) | <u>PRODUCTION</u>                                     | <u>REGIONAL PRODUCERS ASSOCIATION</u>                   |
|    | - Research and Development .....                      | (Research and Development Committee, etc.)              |
|    | - Information and Documentation ....                  | (Data Banks, Information and Development Centres, etc.) |
|    | - Processing .....                                    | (Regional Producers Association, etc.)                  |
|    | - Training .....                                      | (Regional Training Centres, etc.)                       |
| 2) | <u>MARKETING</u>                                      | <u>REGIONAL EXPORTERS ASSOCIATIONS</u>                  |
|    | - Market Research .....                               | (Regional Associations)                                 |
|    | - Information and Documentation ....                  | (Information and Development Committees, etc.)          |
|    | - Sub-contracting or joint marketing operations ..... | (Regional Producers/Exporters Associations)             |
|    | - Training .....                                      | (Regional Training Centres)                             |

As the diagram depicts, the different functions in both production and marketing may be institutionalized in many ways. It may be possible that in some cases only one regional institution may cover all the functions defined for a regional association. Both the types of institutions to be created and the types of functions to be included in the institutions will, in the end, depend on the product which is dealt with and the willingness of the countries - including both the public and private sectors - to associate themselves in a regional body.

So far, this report recommends the following process of implementation according to products.

1. RICE: Countries to participate: Guyana, Suriname and Belize.

Institutions: The Guyana's Rice Marketing Board, Guyana's Ministry of Agriculture, the Stichting Machinale Landbouw (Suriname), the Suriname Landbouw Bedrijven Suriland and the Ministry of Agriculture of Suriname, the Ministry of Agriculture of Belize.

The gathering of these institutions may attempt to coordinate and cooperate at the production level on Research and Development, Information and Documentation and eventually the setting up of a joint programme for the training of research and development staff. A regional committee to coordinate these initiatives is highly recommended. It should be noted that there are other countries which, at the present time, are producing rice to satisfy an internal demand. If the parties involved so decide, the incorporation of other countries namely, Jamaica, Haiti, Dominican Republic, Cuba and Trinidad and Tobago may be attempted. On the other hand, if the emphasis is put on the marketing side, those countries which are not exporting rice should not be considered in the formation of a regional committee.

However, it is recommended to start with a gathering of countries around the activities related to production.

2. CORN: The implementation of a regional effort in coordinating either production or marketing of corn seems doubtful. There are no conditions for the development of regional producers/exporters associations in this product.

3. LEGUMES: A regional committee to coordinate the marketing of legumes could be attempted. The countries and institutions to be considered are as follows: Cuba, Ministry of Foreign Trade; Haiti, the Comite National de la Cooperation through the Ministry of Agriculture; Dominican Republic, CEDOPEX and the Ministry of Agriculture, ADOEXPO and FEDECOOP; Suriname, Ministry of Agriculture. The English-speaking countries to be considered here are: Guyana, Jamaica, Barbados, Trinidad and Tobago, St. Vincent, St. Lucia, Antigua and St. Kitts. (Montserrat, Dominica and Grenada may also be considered). The institutions which in these countries deal with marketing are the respective Marketing Boards or Agencies.

It should be borne in mind that an initial gathering around coordination of marketing may well be extended to aspects related to production.

A regional committee for legumes may be a part of a wider coordinating effort which could be attempted for other products such

as fruits, vegetables and ground provisions.

4. TIMBER: Countries and Institutions to participate:

- Guyana - Timber Export Board
- Suriname - Division of Forestry, BRYNZEEL
- Belize - Division of Forestry and Private Companies to identify.

In the case of timber a Regional Timber Export Committee may be formed. Its main function, at the beginning, may be concentrated on a regional coordination of Research and Development and the cooperation and coordination of information and documentation related to marketing. A second stage in the establishment of the Committee could be the joint implementation of projects attempting the processing of waste. International institutions such as FAO may serve as coordinator of the local institutions at the early stage of the creation of such a Regional Committee.

5. OILS AND FATS: The creation of regional associations is not foreseen in this sector. However, further cooperation and coordination of activities related to the production level can be implemented through the already existing committee at CARICOM.

6. FISH AND CRUSTACEANS: Countries and Institutions to participate:

- Cuba - National Fisheries Division
- Guyana - Division of Fisheries
- Suriname - Ministry of Agriculture, Division of Fisheries
- Trinidad & Tobago - Ministry of Agriculture, Division of Fisheries and National Fisheries
- Barbados - Division of Fisheries
- St. Lucia - Division of Fisheries (Ministry of Agriculture)

In this sector, a possible institutionalization is foreseen in the area of training at the production level. The already existing training centre in Trinidad and Tobago may be extended to Cuba and Guyana or another centre may be created in Cuba. The coordination and cooperation in training at the production level may be extended in the future to other aspects related to production namely, Research

and Development, joint fishing and processing operations, joint operations related to maintenance and repair of fishing equipment.

7. LIVESTOCK: Countries and Institutions to participate:

- |                    |  |
|--------------------|--|
| Guyana             | - Livestock Development Corporation  |
| Trinidad & Tobago  | - Livestock Division, Ministry of Agriculture; Department of Animal Science, University of the West Indies.                                      |
| Barbados           | - Livestock Division, Ministry of Agriculture.   |
| Jamaica            | - Agriculture Development Corporation, Livestock Division, Ministry of Agriculture, Department of Animal Science, University of the West Indies. |
| Dominican Republic | - Livestock Division, Ministry of Agriculture, Department of Animal Science, Universidad Autonoma de Santo Domingo.                              |
| Cuba               | - Livestock Division, Ministry of Agriculture  |
| Belize             | - Livestock Division, Ministry of Agriculture  |

A regional committee aiming at strengthening the coordination and cooperation at the production level may be attempted. The functions to be included may be: research and development, propagation of breeding stock, research and development on feed. The committee may further its functions to aspects related to training of staff concerned with production and propagation of breeding stock. It should be noted that the less developed countries of the area may benefit from this regional effort once a committee is established. The LDC's may constitute a sub-committee emphasizing research and development in small stock. This sub-committee may be integrated by: Grenada, St. Vincent, St. Lucia, Dominica, Antigua, Montserrat and St. Kitts-Nevis-Anguilla.

8. POULTRY: The implementation of associations of producers/exporters in this area seems doubtful. Nevertheless, at the production level, it is possible to attempt a coordination and cooperation programme aiming at the establishment in the English-speaking Caribbean including Suriname, of centres devoted to the production of fertile eggs. This effort may be pursued under the auspices of CARICOM.

9. FRUITS, VEGETABLES AND GROUND PROVISIONS: Countries and Institutions to participate:

- Cuba - Ministry of Foreign Trade
- Haiti - Marketing Division, Ministry of Agriculture
- Dominican Republic - CEDOPEX
- Suriname - Ministry of Foreign Affairs (Foreign Trade Division)

The English-speaking countries should be represented by their Marketing Boards or Agencies.

The creation of a committee aiming at coordination and cooperation at the marketing level could be attempted in this group of products. The main functions to implement are: the coordination of intra-trade activities, the cooperation in market research, information and documentation in marketing aspects, training of staff in marketing activities, the cooperation aiming at the joint marketing operations and sub-contracting. It should be pointed out that at CARICOM there is already an attempt to gather the marketing corporations or agencies. This initiative could be expanded to non-English-speaking countries of the CDCC. In a second stage, a regional committee for the marketing coordination may be extended to activities related to production, such as the joint operation on purchasing inputs of common use, the joint operation for the further processing of some products such as fruits and vegetables.

10. CITRUS: Countries and Institutions to participate:

- Trinidad & Tobago - Citrus Growers Association
- Dominica - Citrus Growers Association
- Jamaica - Citrus Growers Association
- Belize - Citrus Growers Association
- Cuba - Ministry of Foreign Trade
- Haiti - Marketing Division, Ministry of Agriculture
- Dominican Republic - CEDOPEX, FEDECOOP, ADOEXPO

The case of citrus calls for a process of institutionalization in two stages. First, a reorganization of the British Caribbean Citrus Association should be attempted. This gathering of citrus growers

associations of Trinidad & Tobago, Jamaica, Dominica and Belize can be implemented in the short term by making funds available for such a meeting. The International Trade Centre - UNCTAD may be the coordinating and supporting agency for this first encounter together with the participation of the CDCC.

A second stage in the process of institutionalization should include, at least, Cuba, Haiti and the Dominican Republic, and eventually St. Vincent, St. Lucia and Grenada.

A regional citrus association could be formed, in the short term, by expanding the B.C.C.A. The functions this Caribbean Citrus Association may attempt to implement may well include all the aspects related to production and marketing of citrus as explained at the introduction of this section. Nevertheless, the aspects which should get the early attention of such a regional association are: cooperation and coordination of rehabilitation programmes, coordination in research and development emphasizing aspects related to pest control, coordination and cooperation in aspects related to market research. A stage in which joint operations both at the processing and marketing of citrus could be attempted is foreseen.

11. COCOA: Countries and Institutions to participate:

Trinidad & Tobago	-	Cocoa Board and the Cocoa Growers Association
Grenada	-	Cocoa Board
Jamaica	-	Cocoa Board and the Cocoa Growers Federation
St. Lucia	-	Agriculturists Association
Dominican Republic	-	FEDECOOP, CEDOPEX, ADOEXPO

A regional association or coordination committee may be implemented in the case of cocoa. Emphasis should be put on aspects related to production in areas such as: rehabilitation programmes and research and development. At the same time, cooperation in the area of marketing can also be attempted. The participation of the International Trade Centre - UNCTAD as coordinator of the regional committee is highly recommended.

12. ARROWROOT: No regional institutions are foreseen in this case. Arrowroot is a product almost exclusively produced in St. Vincent.

Evidently, the CDCC Secretariat must play an initial role in the coordinations and supports of the recommended regional associations or committees. The CDCC Secretariat (through its documentation centre and through its obvious connections with international organizations, the United Nations System in particular, should play a catalytic role in the efforts leading to the formations of regional associations.

Other regional organizations such as CARICOM, the Caribbean Development Bank, the Caribbean Research and Development Institute and others like the like, should be called upon in order to associate themselves in the initiation of the process of implementation of the regional associations (or committees). The inclusion of the aforementioned institutions and others which may not be named in this report should be at the discretion of the coordinating centre, namely the CDCC Secretariat.

SUMMARY ACCORDING TO PRODUCTS

All information and findings of the mission have been organized in the following series of diagrams by products and groups of products to describe in a schematic and synthesized form the institutional framework under which production and marketing of the respective products take place in countries of the area.

The institutional framework has been arbitrarily designed to allow a maximum of explanation about associations dealing with production and/or export. It is worth noting that only those countries already exporting the produce or with potential to do so in the future are considered in the following diagrams:



DIAGRAM NO. 1

INSTITUTIONAL FRAMEWORK

RICE

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
GUYANA	Cooperatives and unorganized farmers	Guyana Rice Board	Guyana Rice Board	Guyana Rice Board (Sole Exporter)	Not Done	Not Done
SURINAME	Cooperatives and unorganized farmers	Ministry of Agriculture	Ministry of Agriculture	Cooperative Association of Rice Exporters Stichting Mechanisale Landbouw	Not Done	Not Done
BELIZE	Big Falls Ranch Ltd. (Private Co.) Unorganized farmers	Not Done	Ministry of Agriculture	Big Falls Ranch Ltd.	n.a.	n.a.

OBSERVATIONS: It is worth noticing that Trinidad and Tobago, Haiti, Jamaica, Dominican Republic and Cuba are all expanding their production of rice with the prime objective of substituting imports.

As the Diagram No.1 depicts, there is a rather similar institutional setting at the level of production, that is to say, there exist some institutions such as cooperatives but there also prevails a rather large sector of unorganized farmers. The marketing level is more heterogeneous. In Guyana there is a Statutory Body which regulates and organizes marketing. Both Belize and Suriname are characterized by the presence of private companies controlling marketing operations.

RECOMMENDATIONS: An attempt to bring together the producers of rice may come by inviting the concerned parties to a meeting on the subject of Research and Development. This may be strengthened by including other growers in those countries where, though there is no export of rice, there are plans for an expansion in production. This strategy will be oriented to producers.

Another strategy may be the gathering of marketing organizations and enterprises. Although it seems doubtful as far as the subsequent association is concerned due to the fact that private companies dominate the marketing of rice in Belize and Suriname. Nevertheless, the initiative may be pursued should Suriname and Guyana come to terms on a regional association of exporters.

## 2. CORN

Any regional association on corn seems doubtful at this stage. Exports of corn are occasional in countries such as Barbados, Belize and the Dominican Republic. The only country with a sustained programme of corn production and exports is Antigua. Nevertheless, the whole operation is under the control of a subsidiary of an American company. In the future, a gathering of producers on the subject of a co-ordinated effort of R&D and other subjects related to production may be attempted. However, an expert's report may be necessary prior to any initiative of bringing together corn producers.

3. LEGUMES

These are crops which are exported occasionally in some countries. The characteristics of legume production is based on the mixed type of farming which is performed in the region. There are no local associations or cooperatives specialized in legumes, so it seems difficult to organize producers at an international level. Nevertheless it is possible to bring together the organizations which deal with the marketing of legumes. These are the Marketing Boards (or Agencies) in the English-speaking countries plus CEDOPEX (as an organization of exports) in the Dominican Republic and the Ministry of Foreign Trade in Cuba. The case of Haiti is somewhat different for there is no Governmental institution dealing with exports yet. There is, nevertheless, a project to create a Marketing Division at the Ministry of Agriculture. This may be the Haitian counterpart.

A strategic initiative on legumes may come as a result of meetings of the Marketing Bodies of the countries involved. It seems, however, doubtful at this stage that any initiative for legumes will be successful if it is separated from other crops which are exported jointly.

DIAGRAM NO.2

INSTITUTIONAL FRAMEWORK

TIMBER

PRODUCTION

MARKETING

COUNTRY	PRODUCERS' ORGANIZATION	R&D	PROCESSING	MARKETING ORGANIZATION	RESEARCH	PROMOTION
GUYANA	Unorganized Contractors	Negligible	None on waste Private mills	Timber Export Board	Timber Export Board	Timber Export Board
SURINAME	Unorganized Contractors	Some at the Division of Forestry	None on waste. Timber processing concentrated in one firm	Private Company "BRYNZEEL" (Board has been proposed)	n.a.	n.a.
BELIZE	Unorganized Contractors	None	Private mills	Private Companies	n.a.	-

The institutional framework in the case of timber is suitable for an attempt of a regional association (or committee) at the marketing level. The already operating Timber Export Boards of Guyana may work together with a similar institution in Suriname if formed in the next year.

Producers or processors (saw mills) may be gathered, once international agreements are settled for marketing purposes. In any case, due to the fact that the land with forest is either State land or under State regulations, a joint effort may be attempted, at Governmental level, to carry out the processing of waste or to encourage joint processing schemes. Nevertheless, the performance of pre-feasibility studies is necessary prior to any initiative bound to joint schemes.

#### 5. OILS AND FATS

This sector is well established in the English-speaking countries. Production and exports of oils, fats, soaps and the like are regulated under the CARICOM's oils and fats agreement. It is difficult, however, to form a wider organization (by including other countries other than English-speaking ones) for the CARICOM arrangements have already meant an allocation of resources and markets to signatories of the agreement. In addition, it should be noted that processing companies either are subsidiaries of multinationals - as in the case of Lever Brothers in Trinidad and Tobago - or local companies operating under licences, as in the case of Dominica for the manufacturing of toilet soaps. It seems doubtful, therefore, that there will be an organization of regional "associations" for the sector is already organized and integrated under the CARICOM umbrella.

FISHERIES

DIAGRAM NO. 3

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCERS' ORGANIZATION	R&D	PROCESSING	MARKETING ORGANIZATION	RESEARCH	PROMOTION
GUYANA	State Enterprise (150 trawlers)	n.a.	State Company	State Company	State Company	State Company
SURINAME	Private Co. SAIL (American) SUJAFI (Japanese) (190 trawlers)	n.a.	SAIL	SAIL, SUJAFI	n.a.	n.a.
TRINIDAD & TOBAGO	NATIONAL FISHERIES (State Co.) Foreign Companies (Private) (24 trawlers)	Fisheries Division	NATIONAL FISHERIES +	NATIONAL FISHERIES and Foreign Co. (Private)	n.a.	n.a.
CUBA	State Company (over 800 trawlers)	n.a.	State Company	CARIBEX	CARIBEX	CARIBEX

As diagram 3 shows, the institutional framework for the case of fisheries in the area is very heterogenous. While in Guyana, Cuba and partially Trinidad and Tobago there are State-owned companies, in Suriname the fishing sector is totally controlled by foreign companies. It is difficult at this stage to form regional associations. It is worth saying that Cuba and Guyana are already committed in bilateral agreements. On the other hand, Trinidad and Tobago, Barbados<sup>1/</sup> and St.Lucia are participating in a joint scheme for training purposes. (Barbados and St.Lucia are just starting with deep-sea-fishing to supply local demand, mainly).

In the case of other crustaceans, particularly lobsters, in both Antigua and St.Kitts exports are controlled by middlemen. Fishermen are not organized and attempts to form cooperatives have failed.

#### 7. LIVESTOCK

There are no exports of livestock products in the region. The only exports that have occasionally been made consisted in breeding stock. Occasionally, some pork has been exported from Barbados and Guyana to nearby countries. This scheme may well be encouraged by regional emphasis on Research and Development programmes. There are, undoubtedly, countries with a large potential for the production of pigs and cattle. Nevertheless, the main constraints are in the area of feeding stuff. This aspect may be dealt with on a regional basis. There are local associations in almost every country and there have been also some initiatives, at the level of research institutions, attempting coordination and cooperation.

There is in the region a large potential for a joint effort in the problem area of feeding stuff. It is worth noting that independently, many countries have been experimenting with local raw materials for the making of feeding blends by mixing coconut meal with corn, molasses and rice rejects (broken rice). A coordinated effort in this sector may come out from a larger cooperation between countries involved.

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<sup>1/</sup> Barbados and St.Lucia have a fleet of 25 and 3 trawlers, respectively.

Research and Development in this area are almost exclusively performed by the Department of Animal Science of the University of the West Indies plus some effort in some countries of the Livestock Divisions of the Ministries of Agriculture. There are, nevertheless in almost every country a Livestock Producers' Association or co-operatives specialized in livestock. Stronger links between the associations or cooperatives should be encouraged. There is no other option but an official initiative in this field to bring together producers with research officers and extension officers for the policies coming from the respective Ministries of Agriculture (and Livestock) play a fundamental role in the development of the sector.

#### 8. POULTRY

The production of chicken in every country of the area has increased substantially during the last ten years. Production of broilers has had an impact in the area that eating habits have been transformed in every country. However, every single country visited by the mission has a problem of importation of fertile eggs. Some small countries, particularly the LDC's have to import the chicks from the relatively more developed countries of the region.

During the visit to Antigua, it came to the mission's knowledge that a report for the ECCM (East Caribbean Common Market) on the subject of the poultry industry was being prepared. Apparently, it is suggested in that report that it is feasible in the ECCM to create a centre for the production of fertile eggs. Mixed opinions have been made on this subject.

There are, undoubtedly, great advantages for a regional effort oriented to the production of fertile eggs. Unquestionably, the countries will be in a better position if the starting stage for the broilers' production is performed in the region. At the present time, every country has to import either fertile eggs or chicks from advanced countries, particularly from the U.S.A. A regional centre to supply the many chick producers with fertile eggs or chicks may be an important step towards autonomy in this problem area.

Nevertheless, it should be pointed out that the difficulties, at the present time, are hindering the implementation of such a regional venture. First, there is a technical problem related to the actual handling of fertile eggs production. It requires extreme care in sanitary conditions. This basic factor makes recommendable the organization of production in separated centres to avoid the spreading of diseases, infections and the like, if they take place. With regard to this point, there are advantages and disadvantages for the promotion of production centres in the Caribbean, for the distinction of centres in islands help to isolate them for the prevention of diseases; but on the other hand the problem of transport has to be added to the disadvantages side.

Secondly, intra-regional transport is, at the present time, an obstacle to such a venture, apart from the global problem of trade amongst the Caribbean countries. The functioning of regional-based transport companies both maritime and aerial, is already a reality. Nevertheless, this effort is still small if one takes into account the volume of trade which is carried out by non-regional companies which tend to connect the Caribbean countries with European or North American centres rather than intra-regional ports.

Thirdly, there is a lack of local technical expertise in the field of poultry production. It is a fact that production of broiler itself is simple to handle, but the handling of fertile eggs production and even hatching requires some technical capability which at the present time may not be available in the region, at least in the English-speaking Caribbean countries.

Nevertheless, the creation of centres in the CDCC area for the production of fertile eggs and hatching may not be rejected offhand. An expert's report involving all the CDCC area on this matter is necessary, though.

FRUITS, VEGETABLES AND GROUND PROVISIONS

DIAGRAM NO. 4

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
ANTIGUA	Unorganized farmers	None	Extension Division Ministry of Agriculture	Central Marketing Corporation	None	None
BARBADOS	Barbados Agricultural Society Food Crop Farmers' Association. Barbados Agricultural Development Corporation	Ministry of Agriculture U.W.I.	Extension Division Ministry of Agriculture	Barbados Marketing Corporation	n.a.	n.a.
BELIZE	Placentia Producers' Cooperative. New Banana Growers' Association	None	Ministry of Agriculture	Belize Marketing Board	None	None

DIAGRAM NO. 4 (cont'd)

INSTITUTIONAL FRAMEWORK

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
CUBA	Asociacion nacional de Agricultores Pequenos	Ministry of Agriculture	Ministry of Agriculture	Cuba Export	Cuba Export	Cuba Export
DOMINICA	Dominica Agricultural Society. Unfederated Cooperatives. Banana Growers' Association	None	Ministry of Agriculture	Dominica Agricultural Marketing Board	None	None
DOMINICAN REPUBLIC	FENACOOP. Asociaciones Agricolas y Agropecuarias. Instituto Agrario Dominicano. FETAB	Ministry of Agriculture	Ministry of Agriculture  Instituto Agrario Dominicano	ADOEXPO FENACOOP FETAB Private Dealers	CEDOPEX	CEDOPEX

DIAGRAM NO.4 (cont'd)

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
GRENADA	Unorganized farmers. Grenada Banana Cooperative Society	None	Extension Division Ministry of Agriculture	Grenada Marketing Board Private dealers	None	None
GUYANA	Guyana Co-operative Society. Other unfederated Cooperatives	Ministry of Agriculture	Ministry of Agriculture	Guyana Marketing Corporation	Guyana Marketing Corporation	None
HAITI	Conseil National de la Cooperation. Unfederated cooperatives. Chambre du Commerce.	None	Extension Division Ministry of Agriculture	Agricultural Marketing Service (Ministry of Agriculture). ASDEM. Other Private Dealers.	None	None

DIAGRAM NO.4 (cont'd)

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
JAMAICA	Jamaica Agricultural Society. Jamaica Banana Growers' Association.	Ministry of Agriculture U.W.I.	Extension Division Ministry of Agriculture	Agricultural Marketing Corp. Jamaica Export Trade Corporation (JETCO) Private dealers	Jamaica National Export Corporation (JNEC)	JNEC
MONTserrat	Unorganized farmers	None	Ministry of Agriculture	Development Finance & Marketing Corporation	None	None
ST.KITTS/ NEVIS/ ANGUILLA	National Agricultural Corporation. Unorganized farmers.	None	Ministry of Agriculture	Central Marketing Corporation	None	None
ST.LUCIA	Agriculturalists Association. Federation of Cooperatives. Banana Growers Association	Ministry of Agriculture	Ministry of Agriculture	Marketing Development Board Private dealers. WINBAN (Bananas)	None WINBAN (Bananas)	None

DIAGRAM NO.4 (cont'd)

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
ST. VINCENT	National Union of Small Farmers Banana Growers' Association.	None	Ministry of Agriculture	Marketing Board. Private Dealers	Marketing Board	None
SURINAME	Unfederated Co-operatives SURLAND LTD. Stichting Mechanische Landbouw	n.a.	Ministry of Agriculture	Landbouw Productie Centrale. Private Dealers	None	None
TRINIDAD & TOBAGO	Agricultural Co-operatives. Other Cooperative Societies. Agricultural Society	Ministry of Agriculture U.W.I. CARDI	Ministry of Agriculture	Central Marketing Agency	None	None

Diagram No.4 depicts the institutional framework for each country in the case of fruits, vegetables and ground provisions. As shown, there are fundamental differences between the production and the marketing sides. While production is almost completely organized in private associations or co-operatives, marketing is very much organized through boards, state agencies and the like. Of course, there are in every country some private dealers who act as agents for foreign firms or as direct sellers of some produce in foreign markets.

It should be pointed out that there are many countries in which the organization on the production side is weak. Farmers are not organized in Montserrat, St.Kitts-Nevis-Anguilla, Antigua, Belize and Grenada. In other cases, this lack of organization is the result of a mixed type of farming. This means that in some cases, the WINBAN countries for instance, farmers are almost totally included in some particular association. (Banana Growers' Associations in the WINBAN case).

It seems doubtful, therefore, that the regional producers and exporters associations will be a success. Producers are definitely not exporters in the majority of cases, therefore in the sector of fruits, vegetables and ground provisions, a split between production and export should be made for associating purposes.

Nevertheless, if taken as priority the purpose of intra-regional trade in this sector, an attempt should be made to organize first a regional conference or committee of export associations. The latter will involve the Marketing Boards, Agencies or Corporations plus other export associations - private and public - in the area. Organization of regional producers may result from an initiative in marketing.

Additionally, in the area of market research and export promotion, the regional effort is very weak. It is worth noting that only Jamaica, Dominican Republic and Cuba have strong institutions for the promotion of exports. In this field, there is a large space for improvement and regional co-operation. Small countries should be encouraged to learn from the relatively developed ones about export organization and promotion which at the initial stages may take the form of sub-contracting. In other words, sub-contracting of export

marketing research and export promotion may start between small and large countries in the region. Simultaneously, apart from the sub-contracting scheme, some programmes of training may be implemented. It is encouraging to have already in the region initiatives such as the Jamaican one in organizing a symposium for the Expansion of Exports in the Caribbean. These types of initiatives should be encouraged and extended to other non-English speaking countries. Similarly, joint or co-ordinated efforts should be encouraged between the more advanced countries in this field, namely Cuba, Dominican Republic and Jamaica.

It is, therefore, thought that the gathering of export and marketing institutions into a regional conference or committee may well represent the starting point of a more dynamic process of integration and cooperation. Such initiatives may have direct effects on both the organization of producers association at the regional level and creation of export promotion offices or departments in small countries if feasible. The latter may start with the establishing of sub-contracts between relatively less developed and more developed countries of the region.

With regard to production, diagram 4 shows the weakness of the Research and Development effort in the region oriented to fruits, vegetables and ground provisions. Apart from the effort done by the University of the West Indies, CARDI, and some experimental stations depending on the respective Ministries of Agriculture, very little is done in the English-speaking Caribbean. Producers' Associations, most of the time represent more a pressure group than a gathering for the improvement of productivity and production. It was frequently perceived during the visits that associations or cooperatives were not connected with Research and Development institutions because of ignorance than anything else. In many cases, both offices of the Ministries of Agriculture and members of representatives of associations and cooperatives ignored the research programmes and their effects performed by UWI, CARDI, CARIRI and other research institutions in the area.

In addition to this, there is a generalized problem of the complete lack of contact between Research and Development institutions of the English-speaking and non-English-speaking countries. A coordinated effort on a regional scale may have unforeseen expectations which may mean a great leap forward in the expansion of production and exports in the region. A coordinated effort, therefore, should be pursued in this field.

CITRUSDIAGRAM NO.5INSTITUTIONAL FRAMEWORK

## PRODUCTION

## MARKETING

COUNTRY	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
BELIZE	Citrus Growers' Association	None	None	Citrus Growers' Association Private Dealers	None	None
DOMINICA	Citrus Growers' Association	None	None	Citrus Growers' Association	None	None
JAMAICA	Citrus Growers' Association	None	None	Jamaica Export Trade Corporation	Jamaica National Export Corporation J.N.E.C.	N.N.E.C.
TRINIDAD & TOBAGO	Citrus Growers' Association	None	None	Citrus Growers' Association	None	None
GUYANA	Unorganized Cooperatives	None	None	Marketing Corporation	None	None

DIAGRAM NO.5 (cont'd)

INSTITUTIONAL FRAMEWORK

PRODUCTION

MARKETING

COUNTRY	PRODUCTION			MARKETING		
	PRODUCERS' ORGANIZATION	R&D	EXTENSION	MARKETING ORGANIZATION	RESEARCH	PROMOTION
SURINAME	Unorganized Cooperatives and Farmers	None	None	Suriname Citrus Centrale	None	None
CUBA	State Farms	n.a.	n.a.	Cuba Export	Cuba Export Ministry of Foreign Trade	Cuba Export Ministry of Foreign Trade
HAITI	Unorganized farmers	None	None	Private Dealers	None	None
DOMINICAN REPUBLIC	Unorganized farmers FENACOOOP	n.a.	n.a.	FENACOOOP, ADOEXPO Private Dealers	CEDOPEX	CEDOPEX

The perspectives for a regional association of citrus producers/exporters is highly plausible. The British Caribbean Citrus Association including the respective Citrus Growers' Associations of Jamaica, Dominica, Belize and Trinidad and Tobago have been weakening during the last two years. But, an encouragement which may come from U.N. Agencies may well give new life to a regional association with great potential for extension to other countries.

It was suggested, during the visit to Jamaica, that the B.C.C.A. should be given some initial financial support by calling a meeting (after two years of formal contracts) of the associated members. A decision to extend the association to other countries of the CDCC may result from this initial meeting. It is worth saying that the Jamaican, Dominican and Trinidadian representatives agreed to cooperate and extend their formal links with growers/exporters of Cuba and the Dominican Republic. During the mission's visits, it was also revealed that there are already some experts of citrus in Guyana, Haiti and Suriname. These countries, through their respective associations, if any, may be invited to join a regional association. It should be borne in mind that a regional association may serve as an incentive to organize other producers in the area, as it actually happened with the Dominican and Belizean Associations with the creation of the B.C.C.A.

A Regional Citrus Association may advance towards the joint processing of fruits which already is done separately in some countries. It is worth pointing out that in Cuba, at the present time, a brand new processing plant with the most modern equipment is ready to start producing juices, concentrates, essential oils and other citrus by-products.

Research and Development is an area of great significance for a regional association. The B.C.C.A's weakening has meant a discontinuity of R&D programmes which may be strengthened should a regional association be established.

It is, therefore, highly recommended that there be support for the organization of a B.C.C.A. meeting aiming at an extension to a regional association of citrus producers/exporters of the Caribbean.

11. COCOA

Production and export of cocoa in the Caribbean have a long tradition. Cocoa, together with sugar and coffee are the traditional crops of almost every country. Therefore, there is an already well established institutional framework in the case of cocoa. In the case of Grenada, Jamaica and Trinidad and Tobago, there are two types of institutions which are merged, in practical terms, namely the Cocoa Associations and the Cocoa Boards. The associations of producers have been intervened by the Statutory Boards since the 1960's in the fore-mentioned countries.

In the case of Cuba, Dominican Republic and Haiti, there are some statutory bodies similar to the English-speaking Caribbean countries for the regulation of the cocoa production and export.

The success of a regional body on cocoa may be possible, although it will have to be related to marketing aspects at the first stage. However, it is recommended the carrying out of an expert's visit to assess the feasibility of a regional association or committee for cocoa which will gather both private associations and statutory boards.

12. ARROWROOT

Arrowroot is a unique crop which, so far, is produced and exported in large quantities by St.Vincent. The demand for the St.Vincent arrowroot is steady which has meant a purchase in advance of future production in St.Vincent. It is suggested the performance of a study to improve the production, processing and selling of arrowroot which may result in valuable advice to the St.Vincent Arrowroot Association. Unquestionably, a study performed by the International Trade Centre, UNCTAD, is highly recommended. It may be possible that as a result of such a study the production and export of arrowroot may be extended to other countries of the region with some potential namely, Dominica, St.Lucia, Montserrat and Grenada.



SUPPORTING COUNTRY REPORTS



## ANTIGUA

The mission's visit to Antigua lasted for two days. According to the Directory of Producers/Exporters Associations, products which are exported in Antigua are: corn, cotton, fish and crustaceans, fruits, vegetables and ground provisions. The findings of the mission with regard to the above-mentioned items and their respective institutional framework were as follows:

### 1. CORN

This is the most important crop which is exported in Antigua. Corn and some sorghum are produced and almost completely exported to the USA by the Antigua Agricultural Industries Inc. This company is a subsidiary of a North American Company, the American Agricultural Industries Inc. The latter was invited to exploit 10,000 acres of land in Antigua when a decision was taken to abandon sugar production in the late 1960's. Unfortunately, no data about production, exports, valued exports, prices, etc. were gathered during the visit to Antigua. Representatives of the company were either abroad or unavailable. A questionnaire was left at the company's office at the beginning of September, so far no reply has been received from them.

### 2. COTTON

Cotton, outside corn, is the single most important crop in Antigua. About 1,000 acres are planted with cotton which account for about 1 million EC dollars a year. Production of cotton is made in State-owned land, and the management and exports are handled by the Extension Office of the Ministry of Agriculture. Plans for the expansion of the cotton production have been drawn though the availability of land is limited.

Cotton seeds are used, as well as some copra coming from the sister island of Barbuda as raw materials for oil manufacturing. There is, apparently, a large scope for expansion of this type of agro-industrial processing.

### 3. FISH AND CRUSTACEANS

Exports of crustaceans, lobster in particular, is worth noting in Antigua. It is estimated by governmental officials that about 250,000 pounds of lobster are exported to the American markets through St. Thomas and Puerto Rico. It is however, known by governmental officials

that exports are totally controlled by six middlemen who act as dealers of the Antiguan lobster. The crustacean is mainly trapped in the sister island of Barbuda, then is transported to Antigua and from there is air-freighted to St. Thomas or Puerto Rico. It is worth saying that no official intervention to these dealings has ever been attempted. No organization of cooperatives of fishermen has been tried either. Returns for dealers seem to be highly profitable; it is reckoned that a fisherman is paid about one EC dollar per pound of lobster while the export price may reach well over 5 dollars (EC) per pound.

With regard to fish, the Government has been participating in the elaboration of a joint project including the neighbouring islands of Montserrat and St. Kitts-Nevis-Anguilla. A joint fisheries project with the financial support of the Caribbean Development Bank (CDB) has been discussed. Unfortunately, during conversations held in January, St. Kitts-Nevis-Anguilla and Montserrat decided to withdraw from the original project. Apparently, Antiguan authorities have decided to go ahead with the project. Financial resources from the CDB are expected to be channelled through the Antigua and Barbuda Agricultural Bank. It is expected that 15 boats of about 40 feet in length are going to be purchased or built in Antigua to start operations by late 1979. It is thought that production surpluses may be exported to nearby Guadeloupe.

With regard to organization of co-operatives and/or associations of fishermen, efforts have not been successful. Two attempts have been made to organize fishermen associations. Apparently, the official policy of subsidising the acquisition of boats and other equipment has worked against organization schemes. For benefits given to individuals have tended to discourage co-operation among fishermen.

#### 4. FRUITS AND VEGETABLES

Exports of fruits and vegetables have been fostered by the Antigua Central Marketing Corporation. This institution was created in 1974 with the explicit aim of stimulating and marketing the agricultural production. The Marketing Corporation distributes about 90% of total foodstuff supplies. The Corporation has implemented a policy of incentives based on a scheme of guaranteed prices which assure the farmers fair returns.

The Corporation is also implementing a policy of production contracts designed to keep certain stocks of produce with export potentials. Exports, under contract schemes, are expected to be developed in items such as tomatoes, cucumbers and carrots. In addition to those products, markets have been tested for the following produce: eggplants, ochros, hot peppers and pumpkins. Orders for 2 million dollars are expected to be supplied in the UK market during 1978-1979.

The Marketing Corporation is also the sole importer of sugar and rice in Antigua. It distributes also a large proportion of powder and canned milk and a substantial supply of meat and poultry. The Corporation also counts on a supermarket where retail sales are made. It also supplies the State-run processing plant with raw materials for juices, jams, sauces and the like.

As in the case of St. Vincent, this processing plant called DUNLAB, is more a kitchen-type of industry. Nevertheless, produce is of good quality and in constant demand.

It is worth saying that the Corporation is well provided with storage, cold room and other facilities resulting from a grant from the Ministry of Overseas Development of the UK. Unfortunately, under the same aid programme, some facilities for the washing, selecting and packaging of produce which have been installed with the buildings have never been used. Apparently, deficiencies coming from installation plus negligence from sub-contractors of the equipment have resulted in a total useless piece of equipment which, at the present time, hinder the grading and packaging which is done by hand.

Note: a leaflet "Acceptable Grades for Crops" and a statistical table with the agricultural produce and their export price for the UK market provided by the Marketing Corporation are enclosed with this report.

Finally, it is worth saying that in Antigua there is some potential for the export of some livestock, particularly poultry. Interviews and a visit to the field were made at the Antigua Poultry and Allied Industry. The latter is a modern farm with facilities to produce and export chicken and processed pork. Unfortunately, due to a liberal policy with regard to imports of chicken and meat, the industry has

to concentrate its production during the high tourist season, thus leaving idle almost six months of the year the facilities for production and processing. The capacity to produce chicken is estimated to be 10,000 a week. Pigs could be produced at about 100 a week or more. The farm also includes hatching, cold rooms, salughtering facilities and milling and mixing facilities for the preparation of feeds. It should be noted that at peak periods no more than 4,000 chickens and 25 pigs a week are processed.

In addition to this, it should be noted that most of the feed stuff used in the industry is of local origin. Local corn mixed with borken rice and a 20% component of local coconut is used for feeding both chicken and pigs. A discussion was held with regard to a regional setting for the making of fertile eggs. Even though the project is interesting, opinions were expressed by the manager of the farm about the conditions of extreme sanitary care which such a venture should have. Nevertheless the idea was not rejected off-hand.

With regard to livestock production, a visit was paid to the experimental station of the Veterinary and Livestock Division, Ministry of Agriculture. There is in Antigua, at the present time, a development scheme in livestock which involves 100 acre plots. The policy of the Antiguan authorities is to substitute imports of beef, in particular. The evolution of imports of livestock products has been as follows:

<u>1963</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
1,614,518	5,186,052	6,708,211	6,971,629 (EC Dollars)

Source: Veterinary and Livestock Division, Ministry of Agriculture.

There is, however, a potential for a bigger increase of livestock so as to reduce imports. Livestock is produced as a part-time activity. In addition, in Antigua there is a large proportion of small stock, particularly, which is raised in State-owned land by landless farmers.

So far, the livestock scheme attempts to develop a new type of cattle by crossing Jamaica "red poll" with "holstein" so as to produce a suitable animal for both milk and beef production. Demand for fresh milk is extremely sensitive to changes in the tourist season. It is understood that during the low season some idle capacity is generated at the dairy industry.

It is worth noting that Antigua has exported cattle for breeding purposes to nearby Montserrat. Technical expertise has also been given. The experimental effort has been connected with multinational projects, at the present time, monitored and performed by the departments of Animal Science at the University of the West Indies.

In Antigua, interviews were held with the following persons:

Mr. Francis Henry	Chief Agricultural Officer, Ministry of Agriculture
Mr. S.M. Christian	Permanent Secretary, Ministry of Agriculture
Mr. J. Robinson	Chief Officer, Veterinary and Livestock Division
Mr. C. Hughes	Officer, Veterinary and Livestock Division
Mr. A. Derrick	General Manager, Central Marketing Corporation
Mr. N. Christian	Officer, Division of Fisheries, Ministry of Agriculture
Mr. R. Camacho	Officer, Division of Fisheries, Ministry of Agriculture
Mr. J. Walters	Manager, Antigua Poultry and Allied Industries
Mr. F. Riviere	Economist, ECCM Secretariat
Miss E. Cooke	Secretary, Antigua Agriculture Industries Inc.

BARBADOS

The visit to Barbados was extended to one day only. A joint meeting was held with officers of the Ministry of Agriculture, the Agricultural Development Corporation and the Marketing Corporation. According to the agenda, Barbados has a certain potential for exports of livestock. The findings of the visit are as follows:

1. LIVESTOCK

The production of livestock in Barbados is not enough to meet local demand. Exports of stocks have been made, but only of breeder stock. In the case of beef, the local herds are almost completely oriented to the dairy industry. The demand for fresh milk is very large and a substantial share of the demand for milk is satisfied with reconstituted milk whose raw material is imported. Nevertheless, Barbados has exported cattle for breeding purposes to the nearby islands, particularly St. Vincent and St. Lucia.

The case of pork is somehow different. Pigs are imported although they are processed locally for export purposes. A big food processing company, namely BARPARK CO. concentrates most of the export of locally processed pork. Imports of pork are made by the Barbados Marketing Corporation, the sole importer to supply the local market. There is in Barbados a Pig Farmers Association. According to officials of the Ministry of Agriculture, the association is more a pressure group than a producers' society. Nevertheless, farmers have facilities to import feeding stuff at reduced prices.

The poultry industry is aimed at being able to meet local demand for chicken and eggs. Nevertheless, there are still some imports of chicken during particular months of the year. Imports of hatching eggs have to be made for sanitary reasons. There are three large hatching units in the country which occasionally export some chicks to nearby countries. It was discussed at length the pros and cons of setting up a regional hatching unit in Barbados or somewhere else in the area. Apparently, the sanitary care of such units has to be made under extreme

conditions so as to avoid any kind of infections. Skepticism was expressed about the chances of having in the Caribbean such units because of their requirements in terms of capital, sanitary conditions, veterinary care and the like. It is, of course, true that such units cannot be concentrated in one location so as to avoid potential spreading of infections, if any. Nevertheless, the idea of projecting a regional Centre for the production of fertile eggs was welcomed.

In the case of small stock namely sheep and goats, as in cattle there has been some exports of breeding stock. Nevertheless, Barbados is not self-sufficient in small stock to meet local demand.

## 2. GROUND PROVISIONS AND VEGETABLES

With regard to ground provisions and vegetables Barbados has some potential for exports. Under CARICOM agreements, Barbados has been given priority in the export of onions into the community. Other exports have been made with the purpose to coin some foreign exchange during peak seasons in other countries. On the whole, Barbados has to import some ground provisions to meet local demand. However, the government has launched a programme for the production and export of onions, eggplants and ochroes. The Barbados Marketing Corporation is the sole exporter of agricultural produce. At the same time, the corporation supplies about 20% of local demand for foodstuff.

It is worth mentioning that in Barbados there is a legal obligation to plant at least 12.5% of the total sugar land, which is resting, with vegetables and ground provisions. This compulsory scheme has been applied since the war. It was applied, of course, to make sure that the country was going to produce its own foodstuff.

With regard to food subsidies, it is worth saying that only rice is subsidized. Subsidies are applied through a Control Price Office which is a dependent of the Ministry of Commerce.

It should be pointed out that Barbados is a country in which, at present, food counts for 25% of total imports. This is not surprising in a country in which most of the agricultural land is devoted to sugar production. In addition to this, it should be borne in mind that Barbados is the country in the region with the highest density of population with more than 550 inhabitants per square kilometre. It should not be surprising, therefore, the high proportion of foodstuff which is imported. At the same time, for the purpose of setting a regional strategy of intra and regional trade of agricultural produce, Barbados cannot be considered as a stronghold.

It is necessary to point out that during the interviews, strong opinions were expressed about the effectiveness of the exercise for the promotion and coordination of producers/exporters associations. It was frankly said that government agencies and departments are tired of receiving UN officials and the like, sometimes answering the same questions from different people, with apparently no effective or evident results. Criticism went as far as to express disappointment for almost every initiative taken by UN agencies - including ECLA - in the promotion of agricultural production in the Caribbean region.

Finally, it is important to note that Barbados, in the area of fisheries, has taken steps to do its own fishing in shrimps to supply local processing plants. During the mission's visit, Barbadian officials were signing agreements with the government of Guyana to allow the operations of Barbados' trawlers in Guyanese waters. The local fleet, so far, consists of twenty-five (25) trawlers equipped with modern facilities for the fishing of shrimps and other species of fish.

Interviews were held with the following persons:

Mr. Abraham A. Braithwaite	Senior Assistant Secretary, Ministry of Agriculture (MAFCA)
Miss Myrtle Y. Jones	Registrar of Cooperatives Friendly Societies (Ag.)
Mr. Chester Atherley	Assistant Secretary, Ministry of Agriculture

Mr. Cepher Gooding	Economist, Ministry of Agriculture
Mr. Reynold Field	Consultant Agricultural Attorney Barbados Agricultural Development Corporation
Mr. Ernest Payne	Deputy Chief Agricultural Officer Ministry of Agriculture
Mr. Frank Richards	General Manager, Barbados Marketing Corporation

BELIZE

The mission's visit to Belize lasted one day. Unfortunately, the visit was made two days after a hurricane had hit that country. Therefore, it was impossible to hold interviews with officials at the Ministry of Agriculture, Trade and Producers/Exporters Association. Nevertheless, an informal interview was held with Mr. Brian Card, Senior Economist at the Ministry of Trade. The findings of that interview were as follows:

1. CITRUS

Exports of citrus are very important. In 1975 about 5 million dollars (Belize dollars) worth, were exported mainly to the UK. Exports consist mainly in concentrates of juices and frozen segments of fruits. There are two processing firms namely, Salade Belize Ltd., and Citrus Company of Belize Ltd. The first one is a subsidiary of a Jamaican based company. The second company is partly owned by members of the Citrus Growers Association. There is a Citrus Board which regulates the production and exports of citrus. The Permanent Secretary of the Ministry of Trade is the Chairman of the Board.

It is worth mentioning that after 40 km per hour gales during the hurricane, it is estimated that half the citrus trees have been lost. Production for 1978-1979 has been reckoned to be reduced by one-third or half of the previous year.

2. RICE

There are some exports of rice which go mainly to USA. It is estimated that about 3,500 tons of packed rice to the American market. The biggest producer and processor of rice in Belize is an American Company, namely, Big Falls Ranch Ltd., established in 1968. The Marketing Board of Belize distributes rice for retail at the national level. No information was available about research and development programmes.

3. CORN

Production of corn still is not enough to sustain an export activity. Surpluses of production are exported occasionally. Nevertheless, there is great potential for corn production. Legumes also have a great potential, particularly beans.

4. TIMBER

Timber is exported mainly to the UK, Jamaica and other Caribbean countries. The main species is pine, followed in importance by mahogany and other hard woods. Exports are in the form of logs and sawn lumber. Apparently, waste is not further used whether for pulp processing or charcoal. There is a big company namely, Crown Land Belize Estate and Produce Co. Ltd., which is partly owned by the State.

5. FRUITS AND VEGETABLES

There are some occasional exports of fruits such as mangoes, pineapples and others. With regard to vegetables and ground provisions, production is only oriented to supply the local demand.

6. FISH AND CRUSTACEANS

There is in Belize a great potential for fishing exports. Occasionally, exports of lobsters are made to USA. The sector seems to be well organized with about seven fishermen cooperatives. Nevertheless, it should be pointed out that it is an artisanal type of fishing that prevails in Belize.

7. LIVESTOCK

In spite of the great availability of land, livestock production is enough to supply the local market. Cattle is raised by private farmers.

It is worth noting that, Belize is a country with an unestimated potential for agricultural production and exports. There is a general willingness at the governmental level to strengthen the links of Belize with the rest of the Caribbean nations. Nevertheless, it should be pointed out that the country needs basic improvements in its infrastructure. There are practically no ports in Belize because of the characteristics of its geography. This makes the in and out transport of goods very difficult thus affecting trade links substantially.

THE REPUBLIC OF CUBA

The mission's visit to Cuba lasted three days. For obvious reasons, the work in Cuba was concentrated on holding talks at the highest possible level to detect the willingness of the Cuban government to participate in regional schemes of cooperation and integration. The attitude of Cuban authorities to the CDCC initiative was a welcoming one. Cuba has undoubtedly supported the creation of the CDCC and its later initiative. The idea of a regional Producers/Exporters association or an integrated scheme for the cooperation and coordination in the production and marketing of agricultural produce was fully accepted.

However, it should be pointed out that Cuban authorities were absolutely clear in expressing their views about their way of co-operating. Cuba gives high priority to bi-lateral agreements. These could be extended to other countries, providing that the original relations are not damaged. At the present time, Cuba is having a number of bi-lateral agreements with some countries of the region, to name some examples, there is an agreement with Guyana for the training of staff to operate deep sea fishing trawlers; there are agreements with Jamaica in areas such as education, health and fishing. Generally speaking, there is a willingness to cooperate in the area and strengthen links with the English-speaking Caribbean countries.

Because of the institutional characteristics which surround foreign trade in Cuba, most of the talks were held with officials at the Ministry of Foreign Trade. Nevertheless, contacts were made with the National Association of Small Farmers (Asociación Nacional de Agricultores Pequeños) ANAP.

Findings of the mission with regard to institutions contacted during the visits are as follows:

1. THE ANAP

The National Association of Small Farmers, ANAP, is the institution which represents the remaining private farmers in Cuba. The association is in no way in confrontation with the Government nor is it a pressure group. On the contrary, it is an institution absolutely integrated to "the revolution". It is an integral part of the planned agriculture

and economy of Cuba, in spite of the great proportion of land which still is under private management.

Small private farmers are estimated at 200,000, with a private control over 170,000 hectares. About 20% of total agricultural land is under private exploitation. The importance of small farmers is even bigger if one looks at their contribution to the production of certain crops. About 82% of the tobacco, 45% of the ground provisions, 20% of the sugar cane, 30% of the livestock and 52% of coffee are produced by small private farmers. Production of rice, citrus, sugar and livestock is done, in the majority, on State farms.

The small farmers are the only remaining group which work the land privately, in Cuba. The size of the holdings has a maximum of 5 "caballerías" (67 hectares). This maximum was fixed by the Second Law of Agrarian Reform issued in 1963. The Cuban authorities have repeatedly said that there will be no additional addendum to the 1963 law. Therefore, the plans for collectivism of land operate in the following way:

The State, with the cooperation of ANAP, is organizing the creation of cooperatives. These cooperatives base their productive activity on the collective use of land. A farmer, before entering a cooperative buys what remains to him (her) as a private holding. Then he or she is accepted as member of the collective sharing with the other members his or her labour and experience.

This process of collectivism of land, by means of cooperative organization, is developing very slowly, for ANAP and Cuban authorities have decided "to respect the last of the private farmers to remain private if he or she wants it". At the present time, about 2% of total private farmers (about 5,000 farmers) are involved in cooperatives. There are, so far, 280 cooperatives whose main productive activity is oriented towards tobacco and sugar cane.

ANAP is fully supporting the process of collectivism of land for it is understood that to "advance to a higher mode of production" will require the collective use of the land. The State, for its part, is supporting the creation of cooperatives by putting more of its facilities to the use of cooperatives. Machinery, various equipment

when needed, irrigation works, and even the establishment of "brand new villages" are given to the cooperatives' members free of charge. It is finally thought that the process of collectivism might take some generations for the concept of private holdings is considered to have an "ideological base" which will disappear with the younger generations.

Finally, it is worth saying that ANAP is fully integrated to the State both technically and politically. It takes an active part in the process of planning and the general management of production. From the political point of view, ANAP leaders, in the majority, are either active members of the Central Committee of the Communist Party of Cuba or members of "Base organizations".

## 2. CUBA EXPORT

Because of the centralized type of economy that prevails in Cuba, exports are promoted and organized by a State company, namely, Cuba Export. This company trades with the main agricultural produce with the exception of sugar. The main items in their shopping list are: coffee, citrus, bees' honey, potatoes, red peppers and tobacco. Cuba Export is a company which is extremely connected to two other institutions. On the one hand it is a dependent of the Ministry of Foreign Trade, therefore, its activities are connected with the incoming/outgoing commodities which Cuba imports and exports respectively. Cuba Export's activities, therefore, are part of a coordinated and somewhat planned system. On the other hand, Cuba Export takes an active part in the process of planning. Exports are planned, up to a certain extent, in advance because of the forecast of future production and availabilities for exports that the Central Planning Council (JUCEPLAN) passes to Cuba Export every year.

The "modus operandis" of Cuba Export determines the possibilities of expansion of Cuban markets. In other words, because what it exports has been programmed in advance, Cuba Export does not sell commodities in the "open market" as a free market company would do. Cuba Export prefers to sell its commodities on a bi-lateral agreement basis signed with the buyer. This operational feature has to be taken into account if cooperation in terms of joint exports or the like are to be proposed. The Cuban point of view on this matter emphasizes the preference for bilateral agreements.

It should be pointed out that Cuban authorities repeatedly mentioned the lack of transport links among the CDCC countries. They seemed to be satisfied with the initiative of NAMUCAR, though it was said that it is not enough.

Cuba Export officials expressed their willingness to serve as an intermediary link between any CDCC country and COMECON country. It is a fact that some countries of the CDCC area are already interested in selling some produce in the Eastern European countries. Spices for instance, particularly nutmeg and pepper are increasingly demanded from COMECON countries. Cuba's experience and links with that market may well serve as a facilitating contact to connect potential exporters in the Caribbean with buyers in Eastern Europe. Sub-contracting was mentioned as a possible means of inter-connecting Caribbean countries with COMECON's potential buyers.

### 3. CARIBEX

This is a State enterprise which promotes and organizes the export of fish and crustaceans in Cuba. CARIBEX is the sales department of the National Fisheries Co. of Cuba. It is undoubtedly a very dynamic and completely export-oriented company. CARIBEX has representing offices in Canada, UK, France, Germany (GDR), Italy, Japan, Soviet Union and Spain. They export a variety of processed products which, according to CARIBEX officials, are widely accepted. Two promotional leaflets containing information about products and representing offices are enclosed with this report.

In addition to the export of processed fish and crustaceans, CARIBEX is the Cuban institution which promotes and sells fishing vessels which are built in the country. Cuba has been building a type of vessel with a displacement ranging from 40 to 70 tons. A new building technique which involves the so-called "ferrocemento" material was introduced in Cuba in the 1960's. At the present time, part of the fishing fleet of Cuba consists of about 800 vessels of the "ferrocemento" type. Colombia has recently bought some of these vessels to enlarge its fishing fleet. In this report, four leaflets describing specifications of such vessels are enclosed.

It should be noted that CARIBEX officials expressed their willingness to cooperate in both production and marketing activities. So far, there is cooperation going on at the production level between Cuba and Guyana. Guyanese technicians are being trained in Cuba or by Cuban trainers in Guyana. Cuban technicians are training Colombian fishermen for the operations and fishing techniques corresponding to "ferrocemento" vessels Colombia has bought. Additionally, Cuban fishing experts are teaching at training centres in Africa.

In summary, Cuba is cooperating in a variety of activities related to production. With regard to marketing, cooperation is also positively seen in this aspect. Joint operations, technical cooperation and training were mentioned as possible areas of interest.

4. ALIMPORT

This is the sole importer of foodstuff in Cuba. As in the case of CUBA EXPORT, it is a dependent of the Ministry of Foreign Trade. ALIMPORT operates, as other Cuban companies, on a bilateral agreement basis. Because of the programming in advance of local production and supply, ALIMPORT puts orders out for the importation of certain items with anticipation. In addition to this, because of foreign currency restrictions, ALIMPORT operates with suppliers on bilateral agreements for this helps to obtain short term credits and other facilities. Possible cooperation schemes involving ALIMPORT were not discussed, though it will be of great interest for some CDCC countries to exchange views on matters related to foodstuff imports. ALIMPORT may be of some help to other Caribbean countries in aspects related to imports.

To sum up, the general attitude expressed by Cuban officials was one of willingness to cooperate with other Caribbean nations, as well as strengthening the links in areas related to trade of agricultural produce. It is worth noting that Cuba is prepared to cooperate with other CDCC member countries at both production and marketing levels. English-speaking countries may benefit enormously from this cooperation scheme in areas related to citrus, fishing and livestock production.

Interviews were held with the following Cuban officials:

Mr. Eduardo Delgado	Director, Department of Economic Integration, Ministry of Foreign Trade
Mr. Horacio Reyes	Director, Department of the Caribbean, Ministry of Foreign Trade
Mr. Osmani Martinez	Under Director of CUBAZUCAR (Sugar Export Co.)
Mr. Amado Alvarez	Director of CUBAEXPORT (Export Co. of Cuba)
Mr. Jose Antonio Rodriguez	Director of ALIMPORT (Import Co. of Cuba)
Mr. Jesus Rodriguez	Marketing Director of CARIBEX
Miss Mercedes Estero	Economist of CARIBEX
Mr. Leopoldo Ariza	Vice-President of ANAP (Small Farmers Association)
Mr. Ramiro Leon	Senior Official, State Committee for Economic Cooperation
Miss Mirtha Barquet	Economist, State Committee for Economic Cooperation
Mr. E. Klinger	Economist, State Committee for Economic Cooperation

DOMINICA

The mission's visit to Dominica lasted for one day. Dominica is exporting at the present time, some oils and fats. However, the main exports of the country are: bananas and citrus. The findings of the mission are described as follows:

1. BANANA

It is the main export crop in Dominica. As part of the WINBAN countries, Dominica had its share of about 45,000 tons of the total 140,000 tons of exported bananas in 1977. As in the case of St. Vincent, the majority of the farmers are banana growers.

2. CITRUS

The second largest export crop in Dominica is grapefruit. There is the Citrus Growers Association which is the sole exporter of grapefruits. Since 1976 the association is operating a processing and packaging plant which was built in 1973 with the financial support of the Caribbean Development Bank. Exports have declined since 1975, but it is expected that this year shipments will recover previous levels.

SHIPMENTS OF GRAPEFRUIT BY THE CITRUS ASSOCIATION

<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978 (Expected)</u>
207,000	115,000	71,000	120,000

Note: units are cartons of 15 kg. each

As in other associations, growers receive an advance of payment - in the case of Dominica it is EC\$3 per carton - on delivery. At the end of the financial year, profits if any are distributed to farmers. The total exports of 1979 are going to the UK market. The association has signed a deal with a British company, namely, CONNOLLY and SHAW LTD. Shipments are sent through GEEST CO. which acts as an agent. In the past, the Citrus Growers Association has shipped grapefruits to Trinidad, USA and Puerto Rico.

It is worth saying that the Association was very active in areas connected with Research and Development. They used to have three research officers working in areas such as disease and pest control, management of trees, etc. Unfortunately, this effort has been abandoned due to the decline in production in 1976-1977.

The association is also member of the British Caribbean Citrus Association (BCCA) formed by Dominica, Belize, Jamaica and Trinidad. Unfortunately, this regional association has declined in its functions. Jamaica has not attended meetings since 1976 and has not paid its membership fees. In addition to this, the decline in production in Trinidad has also affected the overall performance of the regional association in areas such as common marketing schemes, Research and Development and the like. The Dominican representatives welcome the idea of revitalizing the BCCA and its eventual development of other contacts with growers in the CDCC area.

It should be pointed out that the association does not deal with lime. This fruit is purchased in Dominica by a foreign firm, namely, L. Rose and Co., which apparently, is a subsidiary of Schweppes. The market for lime, then, is controlled by the foreign company which buys and fixes prices for the local production.

### 3. COCONUTS

Coconuts and copra are the third largest exports in Dominica. Processing of copra for the manufacturing of oils and soaps has been regulated by the CARICOM oils and fats agreement. Dominica was assigned 10% of total coconut exports outside the Caribbean region. Dominica also was assigned a big portion of the market for toilet soaps.

### 4. FRUITS AND VEGETABLES

Exports of fruits and vegetables have been increasing during the last three years. The Marketing Corporation is the institution which concentrates most of the exports of produce such as: plantains, limes, ground provisions, pumpkins, mangoes and avocados. In the future it is expected that a sustained export of pineapples, cardamon and cashew nuts will be included in shipment. The trade is mainly with the UK market because of the transport links with that country through the weekly service of GEEST.

The Dominican Marketing Corporation is expanding its facilities. It is expected that by December, this year, it will have installed some cold room facilities and better storage capacity. Nevertheless, grading and packaging facilities are needed. The Corporation has

applied for a British grant to obtain equipment to perform washing and drying of produce. It is also asking for funds to purchase scales, stapler machines and other similar equipment.

#### 5. LIVESTOCK

Meat requirements are imported in Dominica. Nevertheless, since 1974 a producers' association has been trying to develop the production of pigs. The Dominican Meat Producers Association has recently submitted a five-year plan which consists of a second stage of a project that started in 1974 with the introduction of pigs. Since 1974, the project was concentrated in the crossing of white and black pigs looking for a more suitable animal for tropical conditions. The second stage of the project - which is enclosed with this report - is planned to be one of development of production both in pig legs and processing of meat. It is understood that from 1974-1978 farmers are familiar with pig handling and the conditions are ready for an expansion. It should be noted that the proposed plan is ambitious but feasible. Nevertheless, the association needs financing for EC\$239,000 to implement the second stage of the project. There was an almost complete lack of information about sources of finance and where to apply for development funds. In addition to this, if the project is pursued, some technical assistance at the level of production and processing of meat should be required. So far, the association seemed unaware of the potential help which it may receive from UN agencies, Research and Development institutions such as CARDI, the University of the West Indies and the like.

With reference to other stocks, no association of producers is active in developing production. Poultry is produced by independent growers which supply local demand.

Finally, with regard to fish and crustaceans, production is just enough to supply local needs. Fishermen are organized in cooperatives and according to figures at the registry of cooperatives, production is expanding.

It is worth saying that the organization of cooperatives in Dominica is very dynamic. There is a large number of credit unions which influences the development of cooperatives in other areas. It is worth mentioning that the cooperative for the production of bay oil has

been very successful. The "Petite Savanna Bay Oil Cooperative" has had a spectacular growth affecting the production and exports of bay leaves and oil.

Note: a statistical table including all the cooperatives of Dominica, their membership and finance is enclosed with this report.

Interviews were held in Dominica with the following persons:

Mr. Allington Riviere	Permanent Secretary, Ministry of Foreign Affairs and Trade
Mr. James Roger	General Manager, Marketing Corporation
Mr. Balthazar Barrie	Chief Cooperative Officer, Cooperatives Division
Mr. R.K. Shukla	Adviser on Agricultural Marketing, Marketing Corporation
Mr. L.F. Roger	General Manager, Citrus Growers Association
Mr. Royal George	Manager, Dominica Meat Producers Association
Mr. J. King	Permanent Secretary, Ministry of Agriculture.

DOMINICAN REPUBLIC

The mission's visit to Santo Domingo was extended to five days. Unquestionably, the Dominican Republic is the best organized country in the area - excepting Cuba - for the promotion of exports. The Dominican Republic created in 1971 the "Centro Nacional de Promoción de Exportaciones" CEDOPEX (National Centre for Export Promotion). The effects of CEDOPEX on the expansion of Dominican Exports have been enormous. By 1971 the total exports of the Dominican Republic were 240 million (Dominican pesos); after seven years since the creation of CEDOPEX, exports jumped to 778 million per year.<sup>1/</sup>

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<sup>1/</sup> A document containing the description and functions of CEDOPEX is enclosed with this report, namely, "Ley 137 - Centro Dominicano de Promoción de Exportaciones".

TABLE I

Quantity and Value of Exports 1976 and 1977

(In a decreasing order for 1977)

	1976			1977		
	<u>Quantity</u> (in Kgs)	<u>Value</u> (FOB in DR\$)	<u>%</u>	<u>Quantity</u> (in Kgs)	<u>Value</u> (FOB in DR\$)	<u>%</u>
1. SUGAR (Raw)	976,943,423	255,402,708	35.75	1,102,831,714	218,323,378	28.05
2. COFFEE (Green Beans)	36,629,636	87,727,641	12.28	39,909,832	160,844,417	20.66
3. COCOA (Raw Beans)	24,495,536	44,879,206	6.28	25,754,880	93,772,415	12.05
4. FERRONIQUEL	68,187,064	110,440,146	15.46	60,796,815	91,405,533	11.74
5. GOLD + SILVER ALLOYS	40,618	53,939,000	7.55	51,593	54,867,948	7.05
6. TOBACCO (Leaves)	33,001,312	37,980,870	5.32	19,692,762	28,106,561	3.61
7. COFFEE (Toasted Beans)	3,757,613	11,442,994	1.60	4,241,545	25,327,200	3.25
8. BAUXITE	528,732,231	15,371,170	2.15	722,497,692	21,982,721	2.82
9. FURFURAL	31,835,082	20,638,240	2.89	26,156,257	17,259,365	2.22
10. MOLASSA	261,036,419	13,600,600	1.90	246,604,549	12,579,410	1.62
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TOTAL First 10 Items	1,964,658,934	651,428,575	91.18	2,275,537,639	724,468,948	93.07
TOTAL EXPORTS	2,454,948,976	714,383,499	100.00	2,923,068,980	778,401,244	100.00

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Source: "Exportemos", Boletín No. 2. Enero-Diciembre 1977, CEDOPEX

Table 2 shows the destination of Dominican Republic exports according to countries. It is worth noticing that USA, Puerto Rico and Switzerland are the main markets for Dominican exports. Quite naturally, because of the nature of exports namely, sugar, coffee and cocoa.

TABLE 2

Destination of Exports according to countries 1976,  
1977 (First ten countries)

	<u>1976</u>		<u>1977</u>	
	FOB Value DR\$	%	FOB Value DR\$	%
1. U.S.A	455,158,990	63.71	528,268,577	67.87
2. SWITZERLAND	54,711,215	7.66	55,725,630	7.16
3. PUERTO RICO	46,795,281	6.55	49,944,725	6.42
4. HOLLAND	50,959,310	7.13	43,201,252	5.55
5. VENEZUELA	2,279,475	0.32	13,130,745	1.69
6. MOROCCO	2,136,980	0.30	13,089,050	1.68
7. BENELUX	18,879,479	2.64	11,742,152	1.51
8. SPAIN	10,183,783	1.43	8,962,184	1.15
9. CANARY ISLANDS	9,971,601	1.40	5,406,070	0.69
10. CANADA	23,765,693	3.33	4,762,593	0.61
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TOTAL First 10 Countries	674,841,807	94.47	734,232,978	94.33
TOTAL EXPORTS	714,383,499	100.00	778,401,244	100.00

Source: IDEM

Both Table 1 and 2 show a great degree of concentration both in products and countries of destination of exports. Nevertheless, the Dominican Republic has been trying since the mid-1960's to diversify exports. By 1961, there were only 121 items exported, this figure increased to 144 items in 1966 and it reached 321 in 1977.<sup>2/</sup> Undoubtedly, CEDOPEX has played a fundamental role to diversify both export products and markets.

It is however, worth noticing that the Dominican Republic has been exporting some legumes, fruits and vegetables, fish and crustaceans and livestock products. With regard to trade with CDCC countries, it is worth pointing out that a diversification of exports has been occurring. Haiti is the country with the largest proportion of Dominican exports in the Caribbean region (except Puerto Rico), but it should be noted that the Dominican Republic has been expanding its trade to Barbados, Jamaica, St. Lucia, St. Vincent, Suriname, Trinidad and Tobago, Antigua, Guyana and Dominica (in order of importance).<sup>3/</sup>

Moreover, during the mission's visit to CEDOPEX, a Dominican mission was being prepared to visit eight countries in the CDCC area with the purpose of expanding trade relations.

It should be noted that the recently elected Government has explicitly stated its interest in developing and strengthening economic and diplomatic relations with Caribbean nations, particularly the English-speaking Caribbean.<sup>4/</sup>

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<sup>2/</sup> Martínez, Roberto. "La Promoción de las Exportaciones y el Futuro Económico Dominicano" CEDOPEX, 1978, pp.3

<sup>3/</sup> An extended account of volume, value and destination of exports can be found in: "Exportemos", Boletín No. 2 CEDOPEX, Dic. 1977)

<sup>4/</sup> A recently published book of a Dominican economist postulates for an increase in commercial and diplomatic relations with Caribbean nations and other Latin American countries, namely, "Estudio de las implicaciones de la Incorporación de la República Dominicana a la Comunidad del Caribe" Bernardo Vega, Fondo para el Avance de las Ciencias Sociales, Santo Domingo, Julio 1978.

CEDOPEX has been increasingly active in diversifying exports of agricultural service. Furthermore, recently it created a programme called "CEDOPEX al Campo" (CEDOPEX towards the countryside). This programme consists of the promotion of "non-traditional" crops for export purposes. Information is given to farmers, cooperatives and producers' associations containing general information, information related to crop management, financement, production, consumption and exports and marketing abroad. Produce such as: pineapple, ochro, dasheens, bixa, black beans, castor beans and ginger are among the most promoted.<sup>5/</sup>

It is worth noticing that every item on the programme is financed with credits either given by CEDOPEX itself or the Dominican Agricultural Development Bank.

CEDOPEX, apart from its financial help to producers, also operates a number of activities related to the promoting of exports. It is worth mentioning that CEDOPEX has representations in Miami, New York, Puerto Rico and Haiti. They will expand their offices soon to Caracas and one European city. CEDOPEX also depends on a market research unit which has made studies on export possibilities in Japan, Canada and the EEC. It has been also connected with the International Trade Centre - UNCTAD - from where it has received help to carry out market research and similar studies. During the mission's visit it was informally said by CEDOPEX officials that in the future, the centre may become a Foreign Trade Institute with wider functions including import control.

In addition to CEDOPEX, there is another institution in the Dominican Republic which complements the role of the promotion centre. This is INESPRES (Instituto Nacional de Estabilización de Precios - National Institute for the Control of Prices), an institute created to regulate the domestic distribution of some basic food items such as rice, onions, peas, corn and others. INESPRES plays the role of a Marketing Corporation, for it is the purchasing power of best resort for some farmers and it is also the sole distributor of some specific items.

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<sup>5/</sup> Information leaflets about this promotion scheme is enclosed in this report.

In the Dominican Republic, there is a rather extended organization of cooperatives. The State promotes and controls the development of cooperatives through the "Instituto de Desarrollo y Crédito Cooperativo - IDECOOP" (Institute for the Development and Financement of Cooperatives). IDECOOP has been participating in the promotion of exports in the Cooperative sector.

The Cooperative sector itself is formed by five large confederations of cooperatives, namely, FENACOOOP, FETAB, FEDOCOOP, FICOOP and the Taxi-Drivers' Cooperative. In total, the membership of the Cooperative movement reached 1,070,000 members in 1978.

The Confederation of cooperatives, CODOCOOP, decided in mid-1977 to create a financial institution to regulate, obtain and allocate financial resources for the cooperative movement, namely, "Financiera para el Desarrollo y la Cooperación - FICOOP" (Financial Institution for Development and Cooperation).

The Cooperative movement in the Dominican Republic represents the largest sector of agricultural producers. FENACOOOP and FETAB are the most important confederations for the first deals with grains, vegetables and fruits, and the latter organizes and distributes the production of tobacco.<sup>6/</sup>

In addition to the cooperative movement, the Dominican state also participates rather directly in the production and marketing of produce coming from land under the agrarian reform scheme. The "Instituto Agrario Dominicano - IAD" (Agrarian Institute of the Dominican Republic) is the institution which organizes production in the Agrarian Reform sector. It was created in 1962 and up to 1976 the agrarian reform scheme has benefited about 311,000 families. About one-third of the land under crop production has been distributed to settlers and small farmers. The most important feature of the land development programme has been the implementation of an infra-structural development plan. Irrigation works have been particularly important for it has been estimated that the production of agricultural produce will double in the next five to ten years. IAD will soon create a marketing section to help in the distribution of food crops

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<sup>6/</sup> An explanatory leaflet about FENACOOOP is enclosed with this report, namely, COOPAGRO no. 6, January-February 1977.

coming from the agrarian reform sector. It is thought that a substantial proportion of such increases in production will be devoted to exports. Already, there is a large proportion of the land dedicated to tomatoes, sorghum, onions, peas and corn, apart from "traditional crops" (sugar and rice).<sup>7/</sup>

During the mission's visit, two private associations dealing with production and export of agricultural produce were contacted, namely, the "Asociación de Ganaderos, Hacendados y Agricultores" (Farmers and Livestock Growers' Association) and the "Asociación Dominicana de Exportadores - ADEXPO" (Dominican Exporters' Association). Both associations participate on the Board of CEDOPEX and they seem to have good relations with the Cooperative Confederation too.

The Farmers and Livestock Growers' Association counts with about 700 members. This association acts more as a pressure group than a growers/exporters' institution. Exports are done in individual schemes. The Association has been centred in two aspects of the Livestock development section: one, a policy of higher prices for items, such as milk and beef; and the obtention of subsidies for inputs such as feeding stuff. Second, a programme of Research and Development has been implemented to improve the so-called "romana red" and cebú species. As a consequence of this, it has been proposed that a Centre for the Development of Mixed Species be created; this project apparently relies on the support of the FAO and the Central Bank of the Dominican Republic, and other private institutions. With regard to agricultural crops the association has supported the production for export purposes of items such as bananas, yams, sweet potatoes, pimientos, tomatoes and avocados. Nevertheless, exports have been made by ADEXPO.

ADEXPO, the Dominican Exporters' Association is a private society with a membership of about 145 exporters. This association gathers exporters of agricultural, livestock and manufacturing goods. It was estimated that about 20 to 25 members of the association deal with agricultural crops, another 30 members export cocoa and coffee. Executives of ADOEXPO were interested in the idea of regional cooperation

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<sup>7/</sup> Two documents about the IAD are enclosed with this report, namely, "Documentación sobre algunos aspectos generales de la Reforma Agraria en la República Dominicana" IAD, 1977 and "Boletín Anual 1977" IAD, marzo 1978.

in the Caribbean though it was clearly stated that the traditional markets for Dominican produce USA and Puerto Rico - are a net result of the geographical position and the intensive transport links with the already mentioned markets. ADOEXPO is not a producers' association. It is an association of dealers who sit on the CEDOPEX board and also participate on other public institution boards.

To sum up, the findings according to the mission's agenda of original items are as follows:

1. GRAIN PRODUCTS

There are exports of some corn and legumes. The latter including ground provisions reached a total value of about 10 million (DR\$) in 1977. Exports of corn have been negligible. (See item 7, page 11 in Boletín No. 2 Enero-Diciembre 1977, CEDOPEX).

2. TIMBER

Exports of timber (lumber) are negligible. (See item 44, Boletín CEDOPEX, op. cit. pp.33).

3. OILS AND FATS

Exports of animal and vegetable oils and fats are negligible not reaching one million (DR\$). (See items 15 and 33. Boletín CEDOPEX).

4. FISH AND CRUSTACEANS

Exports of fish and crustaceans have increased in the last years reaching almost 1 million (DR\$). (See item 3, Boletín CEDOPEX pp. 9). It is worth saying that in the Dominican Republic there is no industrial fishing - it is almost artisanal, though there is a plan from IDECOOP to promote fishermen cooperatives in order to expand production.

5. LIVESTOCK PRODUCTS

Exports of beef which in 1970 reached more than 8 million, dropped to about 1 million (DR\$) in 1977, (see item 2, Boletín CEDOPEX pp.8). Dairy products, on the other hand, have remained more or less stable, though the value of exports is negligible (see item).

Other crops worth noticing are:

6. FRUITS

Exports of fruits have reached a steady level of about 6 million a year (DR\$). (See item 8, Boletín CEDOPEX pp. 13).

During the mission's visit, interviews were held with the following persons:

Mr. Jesus Maria Hernandez	Under-Director, CEDOPEX
Mr. Salvador Montes	Head, Promotion Division, CEDOPEX
Mr. Joaquin Nolesco	Head, Department of Agricultural Economics, Ministry of Agriculture
Mr. Guillermo Roig	President, ADOEXPO
Mr. Cirio Jensen	Secretary, ADOEXPO
Mr. Raul Gonzalez	Head, Division of Planning, IAD
Mr. Carlos Rodriguez	President, IDECOOP
Mr. A. Esqueda	UN Ambassador (former Director of IDECOOP)
Mr. J. Galvez	Vice-President, IDECOOP
Mr. A. Castro	Head of Division, IDECOOP
Mr. Jose Miranda	President, FENACOOB
Mr. Freddy Boez	Secretary, FENACOOB
Mr. Silvestre Alba de Moze	President, Farmers and Livestock Growers' Association
Mr. Andres Lockward	President, FICOOP

GRENADA

The mission's visit to Grenada was extended to two days. According to the Directory of Producers/Exporters Associations of CDCC countries, Grenada counts on four institutions which organize, promote or regulate exports of some agricultural produce. These were as follows: the Grenada Cocoa Industry Board, the Grenada Banana Co-operative Society, the Grenada Cocoa Association and the Grenada Cooperative Nutmeg Association. An additional association was contacted during the visit, namely, the Minor Spice Cooperative Marketing Society Ltd.

According to trade figures, in Grenada the foreign exchange earner activities in order of importance are: Cocoa, Banana, Nutmeg, Tourism and Minor Spices. None of these items were considered in the terms of reference for the mission's work. Nevertheless, during the visit to Grenada, the Cocoa Board, the Nutmeg Association and the Minor Spices Cooperatives were contacted to find out about their organization, functioning and cooperation with similar institutions in the rest of the CDCC group of countries.

1. COCOA

The export of cocoa is regulated and promoted in Grenada by the Grenada Cocoa Industry Board. This is a Statutory Body created in 1969. This board replaced, in 1969, the Grenada Cocoa Association founded in 1965. The replacement resulted from a decision of the Government to further the control over the most important sector in the country regarding foreign exchange. The Board has the responsibility of operating the processing plant for the fermenting and drying of cocoa beans. It also purchases the beans from growers at four agencies along the country. The Board also operates a purchasing power for "wet cocoa" through small agencies in thirty different locations.

Exports of cocoa are done in the form of beans. For 1978 the projected figure of total exports is 5.5 million pounds, well below figures of exported beans in the past. The buying of cocoa beans is done in a conventional way for the majority of boards or associations in the region. An advance payment is given to the producers at the

time of delivery. Then, at the end of the season, once the beans have been exported, a subsequent payment is performed to balance the accounts with each grower. Prices of the beans are taken as those at the London Commodities Stock. The Board also fixes the standards and grades for different beans and the price differentials applied to them. The exports are negotiated through British brokers who put orders in the UK markets.

The Secretary of the Cocoa Association, who also acts as manager of the Cocoa Board, expressed that a survey had been done with the support of the Organization of American States (OAS) to assess the likelihood of further processing beans in Grenada. Although the findings of the survey have not yet been known, it is estimated that processing of beans for the making of chocolate, cocoa powder and the like is not feasible.

Attempts to increase cooperation links with other cocoa producers/exporters countries have been done recently. Grenada's officers have visited plantations and processing plants in the Dominican Republic and Trinidad during 1978. At the time of the mission's visit, two Grenadian technicians at the Association's processing plant were visiting Trinidad with the purpose of exchanging experiences with Trinidadian staff on techniques of fermenting and drying cocoa beans. The fermentation and drying of beans in Grenada is planned to be done in the near future, in a more continuous way. Fermentation will be done in containers located at the top of a platform from where beans will be scaled down into trays according to different degrees of fermentation and humidity. Final drying will be done by a fan which will blow hot air to the beans. Polishing is done mechanically once the beans are dried. No attempts have been done to promote the use of solar dryers by growers who carry out a first fermentation. Apparently the so-called "wet cocoa" comes from growers who attempt a fermentation once the seeds have been podded. Drying is done by exposing the beans into the open. Eventually, solar dryers may speed up the process of drying, as well as reducing the losses of seeds.

2. NUTMEG

During the mission's visit, talks were held with representatives of the Grenada Cooperative Nutmeg Association. The association is the sole exporter of nutmeg and mace. Since 1975, the government has intervened in the association by appointing an interim board. The Association is the only purchasing institution for nutmeg and mace in Grenada. Growers receive an advance payment on delivery and at the end of the financial year the remaining surplus, if any, is distributed to them. During 1975-1976, growers received a surplus of 3.5 million EC dollars which represented 24% of the total sales (nutmeg and mace). Production of nutmeg and mace has just recovered the production levels of 1951-1955 of about 5 million pounds of nutmeg and 700,000 pounds of mace. Production dropped drastically in 1956 due to the devastating effects of the hurricane Janet in 1955.

In spite of constant increases of production, returns of nutmeg and mace have fluctuated enormously because of price variations. The average price of nutmeg between 1972-1976 fluctuated from 77 cents a pound in 1972 to 188 cents in 1976, going through a peak price of 264 cents in 1975. The fluctuations of prices, among other reasons, have determined a great interest of Grenada to move to an international agreement with Indonesia which is the largest producer of nutmeg in the world. During the mission's visit, a seminar was being held with the participation of producers of spices, nutmeg, representatives of the Ministry of Agriculture, Cocoa Board, Marketing Corporation and an expert of the International Trade Centre UNCTAD-GATT and an export marketing officer of the Caribbean Development Bank. During the seminar decisions were taken with regard to: a closer cooperation with nutmeg and mace exporters of Indonesia, a promotion effort for the produce in the European and North American markets, an exploration of the Eastern European market and the expansion of markets in Latin America, Africa and the Middle East. With regard to minor spices - including cinnamon, cloves, cassia and others, a decision was taken attempting to strengthen the links with other producers in the Caribbean region.

Research and Development is performed in spices, in general, at the Caribbean Agricultural Research and Development Institute (CARDI) in Trinidad. The association used to have a research and development officer who was conducting in Grenada a programme of research under the guidance of the University of the West Indies. Apparently this programme was stopped in 1977. Nevertheless, the need for the implementation of a Research and Development programme is still persisting. Investigations are needed on the nutmeg tree disease. With regard to other spices, research and development as well as extension services aiming at the improvement of farm management is also needed. The exploitation of cinnamon, for instance, is performed in a very rudimentary way; trees are cut down and the bark taken off with systematic care.\*

### 3. MINOR SPICES

The Minor Spices Cooperative Marketing Society Ltd. was contacted during the visit to Grenada. The association had a membership of 265 by 30 September 1977. It was estimated at more than 300 members by August 1978. The association started as a cooperative of producers in 1973 orientated to market its produce. The main spices the association deals with are cinnamon, cloves, cassia and saffron. The association does not operate as the sole purchasing institution for minor spices. On the contrary, it has to compete with private dealers. It was estimated that the association covers about 30% of the shares in the export of minor spices.

Representatives of the association expressed their claims for help from the government aiming at improvements and increases in production, extension services, Research and Development and market protection.

In addition, to the spices sector, contacts were made with the Grenada Marketing Corporation. As opposed to other English-speaking countries in the Caribbean region, in Grenada the facilities of the Marketing Corporation are extremely poor. Produce which is marketed

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\*Note: A detailed account about the financial situation - statistical data included - of the Grenada Nutmeg Association is enclosed with this report. Additionally, a comprehensive analysis of the Nutmeg Industry may be found in "The Nutmeg Industry in Grenada" by J.M. Mayers - Institute of Social and Economic Research, University of the West Indies, Jamaica. Working Paper No. 3, (Enclosed with this report).

by the Corporation has to be piled up in the street because of lack of storage capacity. The Corporation has no warehouse, no transport facilities, no cold rooms either. It has been promised by the Ministry of Overseas Development of the UK some financial support for the installation of a new building with larger facilities. Therefore, exports of agricultural produce are not made by the Marketing Corporation.

However, there are plans for the future to give the Marketing Corporation the sole responsibility as exporter of ground provisions and fruits. The testing of some exotic fruits has been made in foreign markets. Nevertheless, the lack of appropriate facilities has delayed a stage of implementation of a systematic and sustained export activity by the Marketing Corporation.

Exports of some agricultural produce and some fish have occasionally been made by some private firms, particularly those which are currently running supermarkets because of their storage and cold room facilities. Nevertheless, both the physical amount and the value of exports have been negligible.

It is worth noting that during the mission's visit to Grenada, an expansion plan for agricultural production had just been approved by the Prime Minister. Agricultural development must come in Grenada from the public sector's initiative because of the substantial share of total agricultural land owned by the State.

With regard to the willingness of Grenada to participate in regional exporters/producers associations and programmes of cooperation, the answer is positive. Both public and private sector representatives expressed their positive approval for furthering the links of CDCC countries with respect to fostering the production and export of agricultural produce.

Note: during the visit to Grenada, the following persons were interviewed:

Mr. Neville Nedd

Senior Extension Officer, Ministry  
of Agriculture

Mr. Joseph Thompson

Secretary, Grenada Cocoa Association  
and Managing Director, Cocoa Industry  
Board

Sir William Branch	Member of the Cocoa Association and member of the Banana Association
Mr. Robert Renwick	General Manager of the Nutmeg Association
Mr. J. Perd'homme	Secretary of the Nutmeg Association
Mr. Paul Richard	Member of the Nutmeg Association
Mr. Milton John	Manager of the Marketing Corporation
Mr. C. Ferguson	Manager of the Minor Spices Association
Mr. L. Moore	Member of the Minor Spices Association

Additionally, contacts were made with:

Mr. Fezli Hussain	Market Development Officer, International Trade Centre, UNCTAD-GATT
Mr. Charles D'Assier de Boisredon	Export Marketing Officer, Caribbean Development Bank
Mr. Francis Riviere	Senior Research Officer, East Caribbean Common Market

Note: The full name and address of the Minor Spices Association is  
as follows:

The Minor Spices Cooperative Marketing  
Society Ltd.,  
Tyrrel Street, St. Georges,  
Grenada.  
Telephone: 2205  
Cable Address: COPMINTY

THE COOPERATIVE REPUBLIC OF GUYANA

The mission's work in the Republic of Guyana attempted to evaluate the likelihood of forming Regional Producers/Exporters' Associations of which Guyana could be a member in the following products: rice, timber, livestock, ground provisions - including fruits and vegetables - fish and crustaceans and vegetable oils.

Interviews were held with the following persons:

Mr. George Hoyte	Chief Cooperative Officer, Ministry of Cooperatives
Mr. C. Chesney	Chief Officer, Ministry of Agriculture
Mr. E. E. Seaton	Marketing Manager, Rice Board
Mr. Hugh A. Saul	General Manager, Guyana Marketing Corporation
Mr. A.V.E. Chin	Chief Research Officer, Rice Board
Mr. J. Augustin	Chief Planning Officer, Ministry of Economic Development
Mr. N.L. Holder	Managing Director, Livestock Development Company
Mr. Cecil C. Hepburn	General Manager, Guyana Timber Export Board
Mr. R.O. Cummings	Economist, Guyana Timber Export Board

Additionally, courtesy visits were paid to:

	Director, UN-APEC
Mr. R. Mathurin	Acting General Secretariat, CARICOM

According to the Directory of Agricultural Producers/Exporters' Associations of the CDCC countries, prepared by the ECLA Office for the Caribbean, only three producers/exporters' associations existed in Guyana, relevant to the mission's work, namely, the Guyana Marketing Corporation, the Guyana Rice Marketing Board and the Guyana Cooperative Society. As part of the mission's work, apart from the already existing associations contained in the Directory, two additional associations were contacted, namely, the Guyana Timber Export Board and the Guyana Livestock Development Company.

The findings of the mission with respect to the products already mentioned in "1" were as follows:

1. RICE

Guyana is the largest producer of rice in the CARICOM area, with more than 90% of total production. Rice exports represented about 33% of total Guyanese exports in 1977. There exists a long tradition of rice production and exports in Guyana. The institutions dealing with trade of Guyana rice have existed since 1939.

The Guyana Rice Marketing Board was constituted in 1944 and it has dealt with rice exports ever since. The Board is the sole exporter of rice in the country. Its internal structure is divided into two sections: production and marketing. With regard to production, the Board has been very active in the coordination of Government projects aiming at the expansion of rice output. Since 1972 a project on the expansion of irrigation and milling capacity has been implemented.

Linked with the production section, a research and development programme has existed for years. The Research and Development unit is linked with the International Rice Research Institute in Phillipines, and the Centro Internacional de Agricultura Tropical, in Cali, Colombia. Periodical meetings have been attended by Guyanese research officers at both institutes. The research and development programme is aimed at three main objectives: first, the adaptation, development and introduction of high yields varieties of rice; second, the development and introduction of disease resistant varieties; and third, the development of varieties emphasizing some quality characteristics, such as, size and appearance. The Guyana's research interest has been concentrated on the latter during the last five years.

The Research and Development Unit has succeeded in developing rice varieties adaptable to Guyana's climate conditions. The fact that there is not in Guyana a higher solar radiation, compelled the research to adapt varieties appropriate to this climate constraint. The adaptation programmes have successfully developed varieties by breeding rice under the forementioned conditions.

Due to the fact that rice in Guyana is cultivated by small farmers, the Research and Development Unit has devised a strategy of persuasion to introduce new varieties. Seeds are given to farmers free of charge during the first year of introduction of new varieties. It is worth mentioning that the professional staff is integrated by two agronomists, two entomologists, one pathologist, one chemist and the director of the unit. Research and development on rice is only performed by the Rice Board Research Unit. The University of Guyana concentrates its research efforts on the other crops. Additionally, there are plans in the Government to establish a National Agriculture Research Institute.

It is also worth mentioning that the Research and Development Unit has been experimenting with varieties of wheat for their commercial introduction in Guyana. During the mission's visit, samples of harvested wheat were shown. Although the samples did not compare with those of countries with temperate climate, quality of the grains in terms of content and yields seemed quite acceptable. The whole experiment has been inspired by the need that Guyana has in substituting imports, particularly in foodstuff. With regard to this last point, it is worth noticing that in Guyana, wheat flour is already mixed with cassava flour into a considerable proportion.

## 2. TIMBER

In Guyana the production and exports of timber are regulated by the Guyana Timber Export Board. The board was established in September 1973. It is a corporate body whose function is to regulate the export of timber. This function includes: the registration of producers; the recommendation to producers, programmes for maintaining, controlling and regulating supplies of timber.<sup>1/</sup> The Board, therefore, may recommend to producers, programmes for regulating or prohibiting the exportation of timber or any species thereof and for controlling the prices at which timber may be sold for export. Therefore, for the purpose of giving effect to its functions, the Board has the exclusive right to receive orders for the purchase of timber for export and to

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<sup>1/</sup> Guyana Timber Export Board Act, pp. 4

allocate orders among registered producers.<sup>2/</sup> Production of timber has been static for the last ten years. It was estimated by executives of the Timber Board that there exists an unused productive capacity of 60%. To increase production, the government of Guyana has approved a project of exploitation in a joint venture with a German consortium for a period of five years. Additionally, loans have been received from the World Bank and the Canadian Agency for Development (CIDA). The latter consists in a long-term loan to the Guyanese private sector for the purchase of cutting and sawing equipment.

The Board, as the sole exporter of Guyana's timber, carries out the marketing abroad. In the UK, the main market, the Board counts on the services of three UK agents for the placing of orders of Guyanese timber in the European market. Lately, the Board has been constituting an intelligence unit, with the purpose of studying the world market of timber, and other "non-traditional" markets such as Eastern Europe and the Middle East.

According to executives of the Board, the timber exploitation is a profitable venture. Timber producers operate at high returns, for the price they ask the Board for subsequent export has been consistently high. Labour costs are estimated to be about 40% of the total operational cost.

In spite of the flourishing characteristic of timber exploitation in Guyana, the sector faces an important problem, namely, a high proportion of waste. The recovery factor of timber has been estimated by the Board, at 50%. That is to say, about half of the natural resources in forest exploitation is wasted. The Board mentioned about the existence of plans for the establishment of a cellulose processing plant. Additionally, no attempt has been done to recover by-products such as alcohols and other chemical compounds. Apparently, Guyanese authorities have not given deep thought to the further processing of cutting and saw-milling waste.

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<sup>2/</sup> Idem pp.4

### 3. LIVESTOCK

During the mission's visit, contacts were made with the Guyana Livestock Development Company, (LIDCO). This institution is the Guyana's division for the expansion of beef and dairy cattle. LIDCO is engaged in a long-term expansion programme of cattle production and some processing operations. The whole aim of the programme is to reduce imports of evaporated milk which in 1977 represented \$ 30 million (US).

LIDCO's plan contemplates an increase in the production of fresh cow's milk from 15,000 gallons a month to 60,000 gallons a month over the next two years. LIDCO recently took over the responsibility of the operations of the Kingston Milk Plant from the Guyana Marketing Corporation. The expansion programme also involves the increase in the herds of dairy cattle at Moblisse from 670 to 1,700 heads within the next six years, and Elivi herd from 300 to 600.

Other incentives oriented to boost milk production has been done by raising the buying price of milk, at the processing plant, from 17 cents to 30 cents a pint (Guyanese dollars). The processing plant expects to produce about 36,000 gallons of recombined milk, 15,000 gallons of chocolate-flavoured milk and 15,000 gallons of peanut-flavoured milk (peanut punch) in the immediate future.

Additionally, the milk expansion programme has called for the setting up of a much larger milk processing plant. It is expected that a new plant, whose cost has been estimated into \$4 million (US) is likely to be set up on the East Bank, Demerara on the outskirts of Georgetown. The output of the new plant is expected to eliminate the need for the importation of milk.

With reference to beef production, LIDCO is implementing a programme of beef cattle herd expansion. At Mara, the herd is to be increased from 1,000 heads to 4,000 and the herd at Pierre ranch from about 5,000 to 7,000 heads. A long-term plan of the years is being implemented to increase the herd at the Kabower ranch from 4,000 to 7,000 heads. LIDCO's cattle operations is being spread by increasing the level area under cattle production. Recently, LIDCO took over and converted a greens-and-ground-provisions-growing land development scheme at the Mara region into a cattle ranch.

During the mission's visit to LIDCO, difficulties of financing the expansion programmes were expressed by the Manager. However, the financial difficulties are expected to be eased in the near future.

With regard to pork and poultry production, the Guyanese effort is concentrated in substituting imports. It was said that there is a great potential in pork production in the future, for the production of corn which represents the major feeding component is expected to increase into five times in the next two years. Pork and some processed products have been exported occasionally by the Guyana Marketing Corporation.

In the case of poultry production, the emphasis is put on supplying the local demand for chicken. Notwithstanding, some problems prevail in the hatching of fertile eggs. Apparently, the capacity for the local hatching is limited. Therefore, imports of chicks have to be made so as to produce chicken locally. Additionally, fertile eggs for local hatching have to be imported for there is not any plant which could produce them in Guyana.

#### 4. GROUND PROVISIONS, FRUITS AND VEGETABLES

Guyana has been an occasional exporter of ground provisions, fruits and vegetables. There is no export-oriented programme of production in these items. Traditionally, surpluses in the production of the forementioned products have been done.

In the case of ground provisions, only cassava and its processed product cassaripe are worth mentioning with export potential. Other ground provisions are mainly produced to satisfy the local demand.

Grains, apart from rice, have a great export potential in the future. The production of corn and soya beans is expanding, and it is expected to generate surplus over local consumption in the next year.

With regard to legumes, it was said that a programme of expansion in the seeded area with black-eyed peas includes 20,000 more acres. The increased production is expected to be exported to the CARICOM area. A "Food Crop Marketing Project" is being implemented which will bring about substantial increases in food production.

With regard to fruits and vegetables, only citrus, avocados, pineapples and plantains were considered "exportable" in the first case. In vegetables, only pumpkins were considered with certain export potential. As it was mentioned earlier on, the production of food items in Guyana is biased towards the substituting of imports.

5. FISH AND CRUSTACEANS

The information gathered on fish and crustaceans was very limited. The State is controlling the fishing of exportable items such as shrimps and some fileted fish. Deep-sea fishing is done by State-owned trawlers which seem to be in expansion. A National Fisheries Division exists at ministerial level. It also exists in Guyana, an artisanal type of fishing oriented to supply the local market.

Although the programme of expansion of deep-sea fishing facilities such as trawlers, cold rooms and processing plants was not confirmed during the visit, it was expressed by Guyanese officials that Guyana is enforcing its declaration of sovereignty over two hundred miles off Guyana's coast. Agreement were being signed with the Government of Barbados which allowed the operations of Barbadian trawlers in Guyanese waters, for shrimps fishing.

6. OILS AND VEGETABLE FATS

With regard to the production of oils and vegetable fats, Guyana is at the present time manufacturing oils for domestic use and for local consumption. Copra is used as raw materials, nevertheless, the recent trend to use coconut in its green form, is compelling the shift to another source of natural oil. A large programme of expansion of "African Palm" oil tree has been initiated. About 10,000 acres have been already planted with palm oil trees. The programme contemplates a total area of 30,000 acres. The aim is once again to substitute imports in domestic-use oil. However, the perspectives for the future will exceed the amount of raw material needed for local consumption.

7. INSTITUTIONAL ASPECTS

Exports in Guyana are performed and regulated by Statutory Boards. This means that there is a total control from the public sector over the export sector. The State majority controls the Timber Export Board, the Rice Board and the Marketing Corporation. The first two, as it has been said earlier on, are the sole exporter institutions in the case of timber and rice respectively. The Guyana Marketing Corporation, for its part, has the exclusive function of exporting agricultural produce or of recommending the issuance of licenses which occasionally are presented by local dealers.

It is worth noticing that in every institution visited by the mission, the idea of forming regional exporters associations was welcomed in general terms. It was expressed on more than one occasion that every regional commitment of Guyana has to be done with complete compatibility with CARICOM.

It is worth saying that in spite of the emphasis put on cooperatives in Guyana, the associations of producers of agricultural goods are weak with regard to exports. The presence of governmental institutions is overwhelming in the case of foreign trade.

NOTE: Three documents are attached to this section namely, The Guyana Timber Export Board Act, and two leaflets printed by the Guyana Timber Export Board: "Some Timber Available from 1970" and "Timber Presently Available".

THE REPUBLIC OF HAITI

The mission spent two days in Haiti. Exports in this country are concentrated into four items, namely, coffee, cocoa, pite (sisal) and meat and skins. However, it is worth mentioning the exports of castor oils, fish and crustaceans, some spices (saffron, ginger and red peppers) and some fruits and vegetables. At the present time, the most significant imports of foodstuff are pork, rice and corn.

The findings according to the original agenda are described as follows:

1. GRAINS

Corn and rice, are at the present time imported in Haiti. With regard to rice, the mission was surprised at this information. Nevertheless, it was confirmed by both officials at IDAI (Institut National du Développement et Industrie) and at the Programming Unit, Ministry of Agriculture. Corn is also imported, from USA to be used as animal feed and for human consumption.

With regard to legumes, these are exported to USA mainly. There are some cooperatives which export legumes directly, though most of the trade is done by dealers who buy from farmers and send the shipments to the American market.

It is worth noting that there are plans, at the Governmental level, to boost agricultural production. In the present five-year plan, agricultural production has the first priority, the second priority is put in infrastructure, particularly the development of communications, namely, roads, ports, telephones; energy is also included in the infrastructure development programme.

At the Ministry of Agriculture, there is a stage of the development programme already under implementation. The programme is attempting to quote a storage capacity for grains which by 1981 will reach to 30,000 tons. The aim is to provide storage for crops such as corn, sorghum and rice. So far there are some silos with a capacity of 6,000 tons already installed. There are other silos under construction with an additional capacity of 6,000 tons. It is thought that by 1982 a total capacity of 3,000 tons will be available for corn and sorghum; and a capacity of 12,000 tons for rice. This programme of infrastructure development is seen as prior to any expansion in the production, for it will minimize losses or gains which have happened in the past.

2. OILS AND FATS

Exports of castor oil are of some importance in Haiti. This oil (ricin) comes from the seeds of some wild plants. Private dealers buy seeds from peasants and they are exported, not processed. Exports of sorghum are also important. Seeds are exported without processing. The main market for sorghum has been Puerto Rico. As in the case of castor oil, the private dealers dominate the trade. Producers of sorghum are not organized either. No information was obtained about vegetable fats and the like.

3. FISH AND CRUSTACEANS

There is an artisanal type of fishery whose products are exported. Lobster and Lambí (conch) are exported to USA. The trade is monopolized by an American company which has the cold storage facilities. Some plans at governmental level, however, have been drawn up to expand fishery and start with an off-shore type of fishery. At the present time, a diagnosis of the sector is being done. Contacts have been made with the Government of Spain and some private companies to start an industrial type of fishery. However, no substantial result is expected earlier than 1982.

4. LIVESTOCK

Exports of skins and meat of small stock (goats) are being exported at the present time. It should be pointed out, however, that in the current development plan (1976-1981), livestock development is not defined with ends and means. As it happens with the majority of exporting crops, skins and goat meat are exported by dealers who buy the small stock from peasants. Organization of producers is negligible or non-existent, depending on the region. There is, however, an American company which does most of the export of processed meat, namely, Haitian American Meat Products Co. (HAMCO).

5. TIMBER

There are no exports of timber in Haiti, at all.

6. FRUITS AND VEGETABLES

There is great potential for the export of some fruits and vegetables in Haiti. Already, there are exports of mangoes, avocados, soursop, lychies, tomatoes and red peppers. However, it should be noted that, the trade is done by dealers who buy produce from growers.

In Haiti, the system of middlemen (middlewomen) so called "Madame Sará" is very extended. It consists of a group of higglers who buy products from peasants and distant farmers and then they re-sell the products to dealers or other vendors. In some cases, products change hands three or four times. This practice, of course, affects the organization of producers which is very weak.

With regard to organizations in cooperatives, most of the cooperatives are credit unions - about 44% - agricultural cooperatives are only well organized in the coffee sector. About 30% of total cooperatives are agricultural cooperatives, but coffee is the main crop with organized cooperatives. It should be noted that the information in the Directory of Producers/Exporters Association is somehow misleading, for there is a large sector of the peasantry and small farmers, in Haiti- who supply most of the vegetables and fruits - without any sort of organization.

With regard to export of some fruits such as mangoes, papaya, avocados and soursop, contacts were established with the largest export association in Haiti, namely, Association des Exportateurs de Mangues (ASDEM). This is an association of exporters which, at the present time, is exporting exclusively to the USA. Recently, by making use of governmental facilities, tax holidays in particular, the association is setting up a processing factory for the making of juices, concentrates, jellies, jams and sauces, (ketchup and pepper sauces). The association also plants about 600 acres with tomatoes so as to assure a supply of raw materials for ketchup manufacturing. It should be noted that, the association has found difficulty in complying with the American market's standards. They sounded very much interested in the idea of cooperating with other associations aiming at expanding their markets.

Finally, it should be noted that the trade links of Haiti have been extremely tied with the American market. This is not surprising because most of the transport links are with American ports. Additionally, Haiti is only 400 miles away from American ports of the East coast. The initiative of strengthening the trade links with the rest of the Caribbean, was, in general accepted. Nevertheless, the problem of transport links was very much in the area of restrictions that Haitian officials made explicit.

Interviews were held with the following persons:

Mr. René Laroche	Chairman of the National Council for Cooperation, Institut de Développement Agricole et Industriel
Mr. F. Hypolite	Director, Unit of Programming, Ministry of Agriculture
Mr. E. Elma	Director, Conseil National de la Coopération
Mr. V. Duplan	Director, Agricultural Marketing Service, Ministry of Agriculture
Mr. M.A. Mathelier	Director, Extension Unit, Ministry of Agriculture
Mr. M. Bonnet	Coordinator, National Council of Planning (CONADEP)
Mr. M. Liautaud	Manager, Association des Exportateurs des Mangues, ASDEM
Mr. A. García	Planning Officer, Inter-American Institute of Agricultural Sciences (IICA)

JAMAICA

The visit to Jamaica was extended to three days. Jamaica, in the last three years, has been establishing some institutions with the explicit purpose of exercising maximum control over foreign trade, in general. The reason has been the dramatic shortage of foreign exchange Jamaica has been enduring for the last four years. The policy, therefore, has been the starting of an aggressive strategy of promotion of Jamaican exports, thus, the creation of the Jamaica National Export Corporation. This corporation is integrated by representatives of both private and public sectors, though, formally, it is a statutory body of the Ministry of Foreign Affairs.

JNEC created in late 1976, is an institution exclusively oriented to sell Jamaican goods abroad. This institution, the Jamaica Export Trading Company Ltd., has taken the responsibility of selling all Jamaica's pimento; and during 1978 the number of goods both agricultural and industrial which is selling abroad has been constantly increasing.

With regard to imports, Jamaica has created another set of institutions to become specialized in imports of basic items such as foodstuff, pharmaceuticals, building materials and textiles. These institutions were created, particularly, to deal with the difficulty of ensuring a certain level of imports on basic items while the country suffers a shortage of foreign currency. By November 1977, the Government announced the creation of the Jamaica State Trading Corporation. This corporation had the capability of covering a range of imports by developing specialized subsidiaries to deal with a limited amount of goods. By March 1978, there were four subsidiaries namely, the Jamaica Nutrition Holdings Limited, the Jamaica Building Materials Limited, the Jamaica Pharmaceutical and Equipment Supplies Limited and Jamaica Textiles Imports Limited.\*

It is important to point out that the new Jamaican institutional structure has come as a result of balance of payment problems. Because of this, it could be somewhat misleading to think that the institutions will have a temporary character. On the contrary, during the mission's

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\* A Ministry paper "Jamaica State Trading Corporation" is enclosed with this report. A description of the objectives and strategy of the Corporation could be found in that document.

visit to Jamaica, the impression was quite the opposite. Jamaican officials agreed that the institutions created to deal with both exports and imports were a necessary step to implement a strategy of development which needs a greater concern on foreign exchange management. It was thought that only through a tight control and administration of foreign exchange on the one hand, and an aggressive attitude on foreign exchange earnings on the other, Jamaica was going to overcome its foreign trade difficulties.

A brief description of the activities carried out by the Jamaica National Export Corporation (JNEC) follows:

The Jamaica National Export Corporation is an institution particularly established to promote the exports of Jamaican products. JNEC has a number of different programmes which involve: training programmes, marketing, product identification, the study and recommendation of export incentives and the supervision of the Jamaica Export Trading Company. The Board of JNEC comprises members of the private sector and the public sector. The Chairman of the board is the President of the Private Sector Organization of Jamaica, the President of the Jamaica Exporters' Association is also member of the board. The Corporation, because of its character as a statutory body at the Ministry of Foreign Affairs, has an executive director who is an official from the Ministry.

The JNEC has also promoted Jamaican exports by organizing export fairs abroad, by establishing export agencies in USA and Europe and by participating in international expositions. It is worth mentioning that JNEC participated, in March 1978, in the first Trade Fair of the Americas in Miami. The results for Jamaica's export business was highly successful both in gaining experience from the participation and the actual selling of Jamaican goods in reasonable volume. [A report by JNEC about the event is included with this document].

JNEC also organized in July 1978 a "Commonwealth Caribbean Export Symposium". This Symposium was organized to demonstrate to participants ways and means of increasing exports. The subjects which were considered included:

- i) The Use of Material Resources to increase Caribbean exports
- ii) The Use of Financial and Technical Resources to increase Caribbean exports
- iii) The Use of Manpower Resources to increase Caribbean exports
- iv) Opportunities for Caribbean exports in North America, the European Common Market and the non-aligned countries.
- v) The Development of Caribbean exports.

The conclusions and recommendations of this symposium are summarized here for the relevance they have on the development of producers/exporters' associations and the strengthening of cooperation and coordinating links among CDCC countries in the area of trade.

Participants at the symposium recommended that Caribbean Commonwealth Government institutions, and private businessmen and associations should collaborate on the following points:

- 1) Exporters Accountability. It was agreed that exporters should identify and initiate practical methods to expand exports. At the same time, the monitoring of standards of quality and performance regarding production and deliveries were considered of relevant importance for the boosting of exports.
- 2) Export incentives. These incentives could include: taxation measures, travel grants, Research and Development programmes and promotional assistance.
- 3) Marketing. Market research, the strengthening of the CARICOM Regional Trade Data Centre and the need to expand commercial representation overseas were considered fundamental initiatives to expand trade.
- 4) Product identification for Export. It was agreed that identification of products with export potential should be done.
- 5) Export Credit Insurance. It was concluded that the Caribbean Development Bank should coordinate an extension to lesser developed countries in the area of export credit insurance facilities.

- 6) Export Trading House. It was agreed that an export trading company should be established in the lesser developed countries.
- 7) Training. Modern techniques in export marketing, management and practice were considered necessary to develop export.
- 8) Regional Export Promotion Ventures. It was agreed that joint trade fairs and other promotional events are important features in the area.
- 9) Technical Assistance. The possibility of having available some technical assistance from organizations such as the Commonwealth Secretariat, the African Caribbean Pacific Centre for Industrial Development, the International Trade Centre and CIPE was identified.
- 10) Export Sector Involvement in Trade Negotiations. It was agreed that a greater participation of public and private exporters was necessary in the negotiation of international treaties.
- 11) National Export Agencies. It was agreed that the establishment of national export agencies or the strengthening of the already existing ones were advisable.

With regard to the Jamaica Export Trading Company Ltd., the findings of the mission are described as follows:

JETCO was established to maximize foreign exchange earnings and to support small business by strengthening or opening foreign trade to them. JETCO started to export all Jamaica's pimento in 1978. The grading and packaging of pimento is done by the Central Purchasing Warehouse (a Statutory body of the Ministry of Commerce). JETCO then looks for markets and sells the pimento through its agents in USA and Europe.

With regard to citrus, JETCO signed an agreement with the Jamaica Citrus Growers' Association in January 1978. JETCO is marketing oranges, ortaniques and grapefruits for the Association. Grading and packaging are done by the association.

From June 1978 onwards, JETCO has been marketing some produce for the Agricultural Marketing Corporation. It is worth saying that only during July's operations did JETCO exceed the total sales abroad done by the Corporation in the previous year. Produce which has been marketed by JETCO for the Corporation includes sweet potatoes, yams, dasheens, pumpkins and other vegetables. Other products which JETCO has been marketing successfully are pickles, handicraft and some flowers.

The general impression the mission received from JETCO is one of a company efficiently run and autonomous enough from the public sector to operate as if it were a private trading company. It could not have been otherwise, for the explicit purpose of the JNEC, when creating JETCO was to maximize foreign exchange earnings as much as possible. An experienced former private businessman was appointed manager and, at the same time, able staff was recruited to start operations by January 1978.

Additionally, the mission's work in Jamaica included a visit to the Jamaica Agricultural Development Corporation. This is an institution explicitly established to deal with problems of propagation of livestock. Breeding and propagation of cattle and pigs are performed at field stations; from these, stock is transferred to livestock farmers for further commercial multiplication.

However, Jamaica had to import in 1977 about 29 million pounds of meat and about 100 million quarts of milk.

Occasionally, some exports of pigs have been made to Trinidad and Tobago and the Bahamas. With regard to poultry production, Jamaica, as every other Caribbean country, has to import fertile eggs and sometimes chicks. In the overall, the livestock sector in Jamaica has a problem of feeding stuff. Concentrates of feeding components have higher costs. To avoid high costs and to assure a normal supply of feeding stuff, a joint project between Belize and Jamaica has been proposed. Belize will provide the grains and Jamaica will manufacture the end product. So far, there is in Jamaica a plant under construction for the processing of molasses and urea which are basic components for a feeding blend. The Agricultural Development Corporation also has a section for the propagation of small stock

namely sheep and goats. This programme is supported financially by the Government as opposed to the cattle and pigs programme which is self-financed. It is important to point out that there is in Jamaica a Livestock Association with about 6,000 members. Apparently, the Association is working close to governmental institutions such as the ADC in the coordination of propagation programmes as well as Research and Development programmes.

1. RICE

It is worth mentioning that at the present time, there is a five-year plan of agricultural development, explicitly oriented to substitute imports, in which expansion in the production of rice, corn, peas and legumes in general, is contemplated. Jamaica has been importing quite a large amount of grain during the last five years. Rice, for instance, is imported from Guyana in an amount near to 50,000 tons a year. Corn, on the other hand, has been imported in volumes as high as 150,000 tons a year.

It is thought, however, that a careful plan might reduce the import burden quite substantially. In some areas of Jamaica, two crops a year can be obtained. This, of course, can have a tremendous impact on the production of grains and legumes. At the present time, there is a ten-year programme of rice production. It has started with a multiplication of seeds. This project has had the support of the Organization of American States and the Government of Japan which have financed with Research and Development which is necessary for the acclimatization of species and their further multiplication. Milling capacity, though, is limited and therefore it will have to be expanded.

CITRUS

Jamaica is exporting citrus in quite reasonable amounts. The Jamaica Citrus Growers' Association represents the growers and also organizes production, grading and packaging of grapefruits for exports. During 1978, the Association has given to JETCO the responsibility for the marketing of grapefruits abroad.

The association is fully involved in a programme of rehabilitation of trees. About 7,000 acres planted with citrus are currently being rehabilitated. Additionally, another 4,000 acres are being prepared for an expansion of the total area planted with citrus trees.

During the mission's visit, a board meeting of the Citrus Growers' Association was attended. Representatives of the Citrus Growers' Association expressed their concern about current difficulties of the association. Jamaica is a member of the British Caribbean Citrus Association (BCCA), together with Dominica, Belize and Trinidad and Tobago's Associations. Since 1976, the BCCA has not met, mainly due to the absence of the Jamaican Association. Jamaica has not paid its membership fees to BCCA since 1976. Jamaica's explanation has been centred on the lack of resources both to attend meetings and to pay the annual membership fees of the BCCA. During the meeting, as consequence of the mission's presentation of the regional producers/exporters association scheme, a resolution was passed aiming at the revival of BCCA as a first step for a greater gathering which may include Cuba, Haiti, Dominican Republic and other citrus growers in the region.

Jamaica's growers were extremely concerned about Research and Development and extension services. It was openly said that, at the present time, growers in Jamaica have to face problems coming from pests, fruit flies and so-called "West Indian weevil" (a beetle which attacks citrus trees in the region). It was acknowledged that only a regional effort in Research and Development may come with a solution to improve pests control and other factors involved in increases in productivity.

In addition, a great concern was expressed towards information and eventual cooperation with the Cuban counterpart on citrus production and processing. It was also stated that there is a willingness on the part of the Jamaican growers to gather more information about citrus growing and processing in the rest of the world. A concern was made explicit on irrigation systems and improved techniques in the collection and handling of fruits.

In summary, a regional gathering of citrus associations was welcome in Jamaica for it will revitalize the tumbling BCCA and will, eventually, put Jamaican growers in contact with their peers in the region and other parts of the world.

3. OILS AND FATS

The production of oils and fats in Jamaica is controlled by the Jamaica Coconut Industry Control Board. It is a statutory body which exercises control over the supply of copra. There is also a private company namely "Soap and Edible Products" which manufactures most of the production to satisfy local demand. Occasionally, there has been some export of unrefined oil to some countries in the region, particularly, Trinidad and Tobago. It is worth saying that Jamaica is part of the oils and fats agreement of CARICOM which regulates the sector and allocates the markets in the region to the various producers.

4. OTHER CROPS

It is worth saying that in Jamaica there is also some export of cocoa and coffee. As in the case of coconut, there are cocoa and coffee boards, statutory bodies which control and regulate the operations of the Cocoa Growers' Association and the Coffee Producers' Federation of Cooperatives. There is also a Banana Board which exercises control over the Banana Growers' Association.

Interviews were held with the following persons:

Mr. John Pickersgill	Economist, Ministry of Foreign Affairs
Mr. John Goyle	Economist, Ministry of Foreign Affairs
Mr. Ainsley Henrique	General Manager, Jamaica Export Trading Company
Mr. Hugh Bonnick	General Manager, Jamaica State Trading Corporation
Mr. C.L. Bent	General Manager, Agricultural Development Corporation
Mr. Douglas Garel	Officer, Division of Planning, Ministry of Agriculture

Additionally a joint meeting was held at the National Planning Agency with the participation of:

Mr. Alvin Burnett	Economist, National Planning Agency
Mr. P.A. Broderick	Chairman, Citrus Growers' Association
Mr. Peter King	Manager, Jamaica National Export Corporation
Mr. Peter Gordon	Economist, Jamaica National Export Corporation
Mr. W. Byce	Secretary, Jamaica Livestock Association
Miss C. Walcott	Economist, Ministry of Foreign Affairs
Mr. D. Garel	Economist, Ministry of Agriculture
Mr. C.L. Beret	Manager, Agricultural Development Corporation

In addition another joint meeting was held at the Citrus Growers' Association with the participation of:

Mr. P.A. Broderick	Chairman, Citrus Growers' Association
Mr. Ivan H. Tomlinson	Vice-Chairman, Citrus Growers' Association
Mr. C.L.A. Stuart	Member of the Board, Citrus Growers' Association
Mr. Frank Weir	Member of the Board, Citrus Growers' Association
Mr. A.D.T. Nicholson	Member of the Board, Citrus Growers' Association
Mr. J. B. Williams	Member of the Board, Citrus Growers' Association
Mr. H.L. Johnson	Member of the Board, Citrus Growers' Association
Mr. D. Emmanuel	Member of the Board, Citrus Growers' Association

Rev. V.C. Wolfe

Member of the Board, Citrus Growers' Association

Mr. C.V. Beret

Member of the Board, Citrus Growers' Association

With this report is enclosed the following set of documents:

- 1) "Programme of the Commonwealth Caribbean Export Symposium" by the Jamaica National Export Corporation
- 2) "Recommendations to Commonwealth Caribbean Governments and Private and Public Sector Institutions made by the participants at the Commonwealth Caribbean Export Symposium" 2-8 July, 1978
- 3) "Trade Fair of the Americas. Preliminary Report" Jamaica National Export Corporation
- 4) "Report on the Participation of the JNEC in the Trade Fair of the Americas". Lorna Cunningham, Jamaica National Export Corporation
- 5) "Jamaica State Trading Corporation" Ministry Paper

### MONTSERRAT

The mission spent one day in Montserrat. A joint meeting was held with Officers of the Ministry of Agriculture and the Marketing Corporation. It should be pointed out that Montserrat is the smallest country of the English-speaking Caribbean with a population of about 12,000 inhabitants. Exports are mainly of agricultural origin, nevertheless, they account for only 5.4% of total imports. Therefore, the trade balance in Montserrat is extremely negative. The deficit in the trade balance from 1974 to 1976 has been consistently high, about 96%.

However, there is apparently, some potential for exports of some agricultural produce. Some crops could be produced all the year round because of the island's climatic conditions. In the list of crops with some potential the following were named: tomatoes, white potatoes, carrots, beans, sweet and hot peppers, cucumbers, pumpkins, squash and onions. The fruit list included mangoes, avocados, citrus, cashew nuts and peanuts. At the same time, it was mentioned that there is some potential for the production and eventual export of dairy products. There has been a recent change in the characteristics of the beef stock. The variety of "Hollstein" has been introduced to produce milk for local supply and the processing of milk, yoghurt and butter for exports to the nearby islands. So far, no results are expected until 1980.

It was felt that an agricultural policy is missing in Montserrat. In spite of the fact that the Government supplies fertilizers, seeds, pesticides, working capital and even the land, there are no production programmes. Land is even ploughed by the land authorities at a subsidized cost. Undoubtedly, the problems emerge from the particular process of transition from a peasant type of agriculture to a capitalist one. Peasants are not used to producing for the market, and therefore, the working attitude is one of "minimum effort" to cover subsistence, only.

It was argued that the main reason for a lack of production programming was the lack of facilities to store, transport

(inside and outside the island) and packaging agricultural produce.

With regard to fish, local fishermen supply the local market, only. Though there is undoubtedly some potential for exports if productive facilities are set up.

Finally, it is worth mentioning that the mission visited a pilot project for the processing of hot pepper. At the Ministry of Agriculture, pepper is washed, milled and then mixed with preservatives then to be sent to Trinidad to a food processing company. Facilities for final processing, bottling of pepper and other agricultural produce do not exist, though there is a potential for agro-based industries. It should be noted that a propagation station run by a retired professor of the University of the West Indies, is in operation. Net results are yet unknown. Apparently, there seems to be reluctance from farmers to purchase new plants even though prices are extremely low.

It should also be mentioned that the mission visited some infrastructure facilities the Government, with financial support from the UK, has been setting up to promote assembly-type of manufacturing. Already, some assembly of electronic components, toys, radio sets and others is performed. The jobs' creation does not seem to be substantial, though. About two hundred workers are involved in the assembly process.

To sum up, although it was felt, during the visit, that a more comprehensive agricultural policy is badly needed in Montserrat, the effects of financial and technical assistance in the area of agricultural produce cannot be but of fundamental importance.

Interviews were held with the following persons:

Mr. J. Bass	Permanent Secretary, Ministry of Agriculture
Mr. J. McD. Meade	Director of Agriculture and Land Development
Mr. B. Bramble	Manager, Marketing Corporation
Mr. P. Ryan	Agricultural Officer, Ministry of Agriculture.

ST. KITTS, NEVIS, ANGUILLA

The mission spent one day in St. Kitts. It should be noted that in St. Kitts, the State intervention in agricultural production is overwhelming. The State, through the National Agricultural Corporation, (NACO), exploits 14,000 acres of land. About 10,000 acres are devoted to sugar production, the rest of the land is used for food crops production when periods of resting of sugar cane land happened to be.

The agricultural policy has given priority to sugar production, second comes the production of ground provisions (sweet and white potatoes and yams) for local consumption, third comes the production of crops with export potential such as: peanuts, onions and some fruits (pineapples and bananas).

Cotton is the second largest export in the country after sugar. Cotton is grown in small holdings and it is exported mainly to the UK and Japan.

In livestock, there are some imports of beef, pork and chicken. There are governmental means for pushing production of both meat and milk.

Production of fish is enough to supply local demand. In the case of lobster, there is a similar situation to Antigua. Lobsters are delivered to middlemen who airfreight the crustaceans to St. Thomas and Puerto Rico. Institutional organizations of fishermen are very weak. There is only one cooperative of fishermen with only 40 members. The emphasis of the cooperative system is put in consumer cooperatives and credit unions.

A visit was paid to the Marketing Corporation. This institution is presently run by an American Peace Corps volunteer who is training the next manager. The corporation is more a retail shop than a purchasing institution which may promote and stimulate agricultural production.

Facilities given by the UK Development Programme are brand new. However, local farmers use the Marketing Corporation as the

last resort for the distribution of their produce.

It is worth mentioning that the Corporation counts on modern facilities including a teletype, which may well be encouraged to be used for the fostering of exports.

It should be noted that NACO is presently involved in a development programme aiming at the production of peanuts and onions for export purposes. In addition to that NACO is also monitoring a programme of land settlements to be devoted to sugar cane.

It was felt that a greater coordination between NACO and the Marketing Corporation is needed. The first one has failed to forecast production for the marketing of produce done by the latter. Nevertheless, at Governmental levels, it was assured that a more comprehensive programme for agricultural development is expected once the nation gains its total independence.

Interviews were held in St. Kitts with the following persons:

Mr. Hugh Rawlings	Permanent Secretary, Ministry of Agriculture, Lands, Housing and Labour
Mr. Richard Castaneda	Acting General Manager, Marketing Corporation
Mr. J. Setwell	Agricultural Officer, National Agricultural Corporation
Mr. A. Brown	Agricultural Officer, National Agricultural Corporation.

#### ST. LUCIA

The mission's visit to St. Lucia was extended to one day. As in the case of other Windward Island countries, there was no item on the original agenda which St. Lucia exports in reasonable amounts. Nevertheless, during the visit, contacts were made with the following associations: the Banana Growers Association, the Agriculturalists Society, the Marketing Board, the Registrar of Cooperatives and governmental officials of the Ministry of Agriculture.

Exports of agricultural produce in St. Lucia is concentrated on three items: bananas with a share of about 70% of total value of exports, coconuts with about 17% and cocoa with about 10%. Other exports include fruits, vegetables, ginger and pumpkins. The findings with regards to the forementioned produce were as follows:

1. BANANAS

St. Lucia is the biggest producer of bananas in the WINBAN organization. The total production of the four member countries of WINBAN reached in 1977 about 140,000 tons. The share of the St. Lucia Banana Growers Association was about 50,000 tons. The association has approximately 9,000 members, thus covering about 90% of total farmers in the island. The association is the sole exporters of bananas in St. Lucia. Because of its large membership, the association is also the main importer of inputs such as fertilizers, pesticides, herbicides and the like.

The Banana Growers Association is closely linked to the WINBAN whose headquarters is in St. Lucia. WINBAN started as an association in the Windward Islands, aiming to insure the associations in each country. It developed as a joint marketing association; and at the present time, is attempting to increase productivity of trees by speeding up the maturity period. R and D efforts are oriented towards nutrition of trees, disease and pest controls, improvements of quality and the like. The R and D programme is well linked with research efforts done at CARDI, the University of the West Indies and other research institutions in the UK. WINBAN is also considering a project of diversification of the production to species such as plantains.

It is worth saying that WINBAN has signed agreements with Geest Company, a British company which acts as the sole buyer of WINBAN's bananas. Agreements have been signed for the next four years to sell exclusively to Geest, all the production for the UK market. This deal is of particular importance to the Windward Islands because of the transport links which are established through

the Geest Company's shipping services. Foreign trade is thus influenced by the presence of shipping services which link the WINBAN countries with the British market. Exports of other produce apart from bananas tend to be oriented towards the UK, not only because of attractive prices, but because the transport links are more reliable and effective with the UK than any other country.

In addition to the transport facilities which the Windward Islands have, it is worth saying that WINBAN is the institution which supplies the majority of the agricultural inputs to farmers in the four countries. WINBAN therefore, is in practical terms, the biggest purchasing power for fertilizers and other inputs in the Windward Islands. Due to this feature, there is quite a substantial discussion of a regional proposal to transform WINBAN into the sole importer of agricultural inputs for all the Windward countries. St. Vincent already has taken a decision on this line and from 1979 onwards, the Banana Growers Association will be sole importer of the country's agricultural inputs. Nevertheless, for a regional proposal which may give to WINBAN a leading role, a multi-national decision still has to be taken.

## 2. COCONUTS

Exports of coconuts is the second largest in St. Lucia. Production of coconuts is important for both the export of dried coconuts and the supply of raw materials for the production of copra which is used in St. Lucia for the manufacturing of oils, fats and soaps.

The St. Lucia Coconuts Growers Association, with over 2,000 members, is the sole exporter of coconuts and sole buyer of copra. The association is part of the partnership in the St. Lucia Copra Manufacturing Company which at present time is producing edible oils, laundry soaps, lard and margarine. It is worth saying that the processing of copra has been assigned to St. Lucia and the nearby island of Dominica by agreements of CARICOM. St. Lucia was given the exclusiveness of exporting lard and margarine, while Dominica

was given priority in the export of both laundry and toilet soaps. Additionally, St. Lucia is exporting through the Coconut Growers Association, oils in bulk to Jamaica, refined oils to Barbados and coconuts to Trinidad and Tobago.

### 3. COCOA

Exports of cocoa are the third in importance in St. Lucia. The Agriculturalists Association is the sole exporter of cocoa beans which go mainly to the UK market. Exports of cocoa in 1977 reached 97,721 tons (about 218,900 pounds) which meant a value of £180,200 (about EC\$850,000). Fermentation is done in two plants which are owned by Agricultural Cooperatives. However, the polished cocoa beans have to be marketed abroad by the Agriculturalists Association. Recently, St. Lucia officials visited Grenada with the purpose of visiting installations of the Grenada Cocoa Board regarding fermentation and drying of cocoa beans. Nevertheless, the Agriculturalists Association is not involved in programmes of rehabilitation of trees. Replanting and rehabilitation is part of the Government's programme.

In addition to cocoa, the Agriculturalists Association also exports occasionally some nutmeg, mace, cloves and other spices. Nevertheless, it should be pointed out that there is no systematic and organized growing of nutmeg and spices in St. Lucia.

### 4. FRUITS AND VEGETABLES

St. Lucia also exports occasionally some fruits and vegetables mainly through the Marketing Board. This institution has the exclusive rights to export ginger and pumpkins. Occasionally, there are exports of mangoes, plantains, and breadfruits. The Board also imports a substantial proportion of foodstuff for the supply of local hotels and supermarkets.

Facilities at the St. Lucia Marketing Board are somewhat limited. Storage capacity, cold rooms and other facilities for the grading and packaging of exportable produce are in shortage. The Board has been promised an improvement in its infrastructure by the British Ministry of Overseas Development. So far, there

are two British officials advising the manager of the Board in matters such as marketing, accountancy and handling of produce.

5. FISH AND CRUSTACEANS

Although St. Lucia is not exporting fish or crustaceans, it is worth saying that plans have been drawn up to foster the production of fish to meet local demand and start exporting eventually.

The Government, through the Department of Fisheries, has bought three trawlers for the fishing of shrimps in Guyanese waters. A training programme has been initiated and it is considered that it will promote deep-sea fishing in local cooperatives of fishermen. Recently, there was established the National Association of Fishermen Cooperatives which, with the support of Canadian financial aid - through CIDA - is going to include processing and storage facilities for eventual exports. At the present time, total consumption of fish and crustaceans is about EC\$5 million of which half is imported. Fishermen have been given subsidies to buy fuel, engines, boats, nets and other capital goods through cooperatives.

To sum up, there is a great potential for exports of fish in St. Lucia, though the actual process of exporting may take some time.

Note: two leaflets are enclosed with this report, namely, the "Memorandum and Articles of Association of the St. Lucia Agriculturalists Association Ltd." and the "Memorandum and Articles of Association of the Windward Islands Banana Growers Association".

Interviews were held in St. Lucia with the following persons:

Mr. J. Perryman	General Manager of WINBAN
Mr. B. J. Baptiste	Registrar of Cooperatives
Mr. A. Mathews	Chief Agricultural Officer, Ministry of Agriculture
Mr. D. Henry	Economist, Ministry of Agriculture
Mr. M. D. Toussaint	General Manager, Marketing Board.

ST. VINCENT

The visit to St. Vincent was extended to two days. As in the case of Grenada, there was no item in the original agenda which is exported from St. Vincent. Nevertheless, contacts were established with the Arrowroot Association, Banana Growers Association, Marketing Corporation and officials at the Ministry of Agriculture.

1. ARROWROOT

Exports of arrowroot are the second largest in St. Vincent. The production of arrowroot for 1978 was estimated at 9,200 barrels - of 200 lbs - which at a price of EC\$210 a barrel has meant an earning of 1.932 million. It is important to point out that the total production for 1979 is already sold. This flourishing feature of the arrowroot production and export comes from the fact that the St. Vincent arrowroot consists of nearly pure carbohydrate with a calorie value per ounce of 116. The arrowroot is largely used in food processing - because of its quality for thickening soups, gravies and pastry-making - the pharmaceutical industry and the manufacturing of biscuits.

Exports are oriented in order of importance to the UK, USA and Canada, and to other European markets. The demand for arrowroot has increased constantly since the mid 1960's hence the rising of prices.

Arrowroot production is very labour-intensive. The depth of the root does not allow the use of machines or any mechanized system. Production is concentrated into medium and large estates. Nevertheless, inside the Arrowroot Association, small growers are represented on the board by three members out of nine.

This was a net result of a governmental intervention in the association's board which in the past was controlled by big estate owners. Small growers also benefit from a differentiated policy of subsidies which applies to fertilizers, pesticides and other inputs.

The marketing of arrowroot in St. Vincent is made by the St. Vincent Cooperative Arrowroot Association. This association is

the sole exporter of arrowroot in St. Vincent. It has about 200 members, though it receives deliveries from about 350 growers. Minimum requirement to become a member of the association is an annual delivery of over 2,000 lbs of starch or 12,500 lbs of roots. Since 1930, the association has functioned as a statutory body in which the Government appoints members of the board ex-officio. The association also owns and runs two processing plants which extract the starch from the roots. The association is also a partner with the Government in a third plant which is being built. There are also two additional processing plants owned by two large estates.

In spite of the flourishing situation in the arrowroot production, R and D extension services to improve farm management, disease controls and the like, marketing research is badly needed. Because of the unique features of the St. Vincent arrowroot, the production and exports of starch may develop even further if proper assistance to growers and the association is given to foster productivity.

Note: A table containing production tables and relative prices of arrowroot is enclosed in this report, plus a leaflet explaining characteristics and uses of arrowroot starch.

## 2. BANANAS

As in the case of arrowroot, bananas were not considered in the original agenda. Nevertheless, the production of bananas in St. Vincent is of great importance. Bananas are the first export in St. Vincent with more than 60% of the total value of exports. The production in 1977 has been 27,000 tons and is expected to increase during the next five years. Almost every farmer in St. Vincent is a banana grower. Additionally, the membership of St. Vincent in the WINBAN, the Windward Island Banana Growers Association, has meant that - because of the periodical shipping of bananas to the UK - the country is linked with the British European Market every week.

The Geest Company's shipping services connects the agricultural producers of the WINBAN countries with the European markets in a reliable way. Additionally, the shipping company very rarely rejects

shipments of other produce apart from bananas.

In addition to the trade links which are helped by periodical and reliable shipping services, the fact that the majority of farmers in St. Vincent are banana growers has suggested to the Government, a centralized system for the distribution of fertilizers. It has been said by Government officials that the best way to operate the purchasing and distribution of fertilizers, pesticides and the like may be through the Banana Growers Association. The idea has been taken with reservations, to say the least, by the association. Apparently, there is the suspicion from the association that the purchasing and distribution of all fertilizers in the country may get out of hand because of political interference. In addition, it is thought that growers may be tempted to use fertilizers and similar inputs in other crops than bananas. So far, the Government has taken a decision to go ahead with the scheme from 1979 onwards. The banana association has been promised a larger extension services scheme and some financial help to carry out a policy of subsidies which affects fertilizers, pesticides and similar inputs.

It is worth mentioning that St. Vincent, as part of the WINBAN organization, is involved in a five-year development plan aimed at increase of banana production by raising the productivity levels of growers. The plan is attempting to reduce the maturity period of banana trees from five to three years by introducing new techniques and methods of farm management. It is also included in the programme an expansion plan for the production of similar species of bananas such as plantain. R and D is performed by the WINBAN in every member country of the organization, though the largest experimental station is in St. Lucia. It is worth saying that the R and D effort is connected with other initiatives relevant to banana production at CARDI and the University of the West Indies.

### 3. OTHER AGRICULTURAL EXPORTS

St. Vincent is, at the present time, exporting quite a variety of agricultural produce - including processed drinks. A

substantial part of that trade is performed by the St. Vincent Marketing Corporation. This is an efficient and well-administered corporation which has taken the export activity very seriously. The corporation counts on storage capacity, cold rooms, grading and packaging facilities and a strategic location at the Kingstown docks. In addition to this, the corporation runs a supermarket for the retail to St. Vincent consumers of local and imported foodstuff. The corporation is also closely linked with "Agrolab" which is a state-run processing plant for the making of juices, sauces and the like.

In order of importance, the Marketing Corporation during 1977 exported coconuts, fresh ginger, carrots, sweet potatoes and tannias among the most important. The most important markets have been the UK and Trinidad. During 1976, the corporation sold abroad goods for about EC\$3 million and in 1977 sales abroad reached over \$2 million.

The Marketing Corporation is not the sole exporter of agricultural produce though it is the sole importer of sugar and rice. Nevertheless, the corporation has the exclusive rights for the exports of sweet potatoes, carrots, peanuts and cocoa. Importation of sugar and rice has helped the Marketing Corporation to improve its capabilities to deal with large amounts of commodities, at the same time, it has improved the credit-worthiness of the corporation as well as provided it with a bigger amount of circulating capital.

It is worth pointing out that the potential for processed fruits and juices is very large. Production is of good quality, particularly the juices and mixed drinks. However, the Agrolab is more a kitchen-type processing plant. The peeling, cooking and bottling is done by hand. Labelling is not of good quality and most important, the bottling is done into "second hand" bottles of registered marks of beer and rum. Nevertheless, the juices, jams, sauces and mixed drinks are accepted both locally and abroad. Because of its large potential, a carefully drawn plan of expansion for the fruits and spices processing is needed in St. Vincent.

Finally it is worth noting that for two of the items on the original agenda, namely livestock and fish and crustaceans, interviews

were held with Government officials to inquire about export potentials. With regard to livestock, there is a self-sufficiency level in pork production. Beef and poultry have to be imported. There is a programme at the Ministry of Agriculture oriented towards stimulating the production of rabbits as a backyard activity. In relation to fish and crustaceans, in spite of some potential for export in this sector, no plans for expansion exist at the governmental level. Fishing is done at a very artisanal level and it is still not enough to supply local demand. Additionally, it was expressed by governmental officials that French trawlers are fishing totally uncontrolled in St. Vincent waters.

As in many of the small islands, there is no capacity in St. Vincent to enforce sovereignty over certain limits of water. Consequently, various types of fish, crustacean and coral are being taken out without any control from St. Vincent authorities.

Interviews were held with the following persons:

Mr. Carlton Williams	Chief Officer, Division of Planning, Ministry of Agriculture; Chairman of the Arrowroot Association Board; Member of the Banana Growers Association
Mr. David Jack	General Manager of the Arrowroot Association
Mr. Basil Dasent	General Manager of the Banana Growers Association
Mr. Omar Davis	Financial Controller of the Banana Growers Association
Mr. Michael Finley	Secretary of the Board of the Banana Growers Association
Mr. A. C. Antrobus	Manager of the Marketing Corporation

Enclosed with this report are: a statistical table containing data on production, sales and relative prices of arrowroot from 1945 to 1978; a leaflet explaining characteristics and uses of the St. Vincent arrowroot; and statistical information about exports

carried out by the Marketing Corporation during 1977, including items, quantities and value of exports.

THE REPUBLIC OF SURINAME

The mission's work was extended to four days in the Republic of Suriname. According to an agenda previously drawn up and based on the information contained in the Directory of Agricultural Producers/Exporters Association in Suriname, the items to be looked at were: rice, livestock, fish and crustaceans, timber and oil and vegetable fats.

Interviews were held with the following persons:

Mr. Narain	Under Secretary of State of the Ministry of Trade and Foreign Affairs
Mr. Bajracharza	FAO Expert attached to the Forestry Division, Ministry of Natural Resources
Mr. E. Pinas	Officer, Division of Forestry
Mrs. Alexander	Senior Economist, Ministry of Economic Development
Mr. Mahabir	Statistician, Ministry of Agriculture, Husbandry and Fisheries

A brief and general outlook at the economic system of Suriname is attempted here so as to help the understanding of the particular sub-sectors in the export section which are presented subsequently.

The economy of Suriname and its functioning is still closely tied to the colonial past of the country. It was expressed by many Surinamese officials that about one-third of the Surinamese people actually live in Holland. Trade and capital movements between Suriname and Holland are substantial. Additionally, Suriname receives a grant from its former metropolis of about 200 million guilders per year, as part of the negotiation process which resulted in the declaration of independence in 1975. This grant, given for a period of ten years, is affecting the economy of Suriname to a great extent. Commercial activities are flourishing, income per capita is running very high. These two features are just the effect and cause of a noticeable increase in consumption which ranges from consumer foods, durables and luxury goods. Suriname, therefore, looks very much like a

"two-faced" country. On the one hand, there is evidence of underdevelopment such as, poor housing, low income at the peasant level, lack of social services and the like. On the other hand, there are signs of luxurious and sophisticated consumption. It is not surprising then to find in Suriname, a high level of concentration on the production side.

The bauxite industry, which accounts for about 70% of the total GDP and about 90% of total exports, is concentrated on a few companies, all of them either subsidiaries of big corporations or joint ventures with an important component of foreign capital. The situation in the area of interest of the mission's work, namely, the export of rice, timber, fish and crustaceans, is not much different. In fact, in these sectors, exports are concentrated in big private companies with a negligible participation of the State.

It is important to point out here, that the situation bluntly described above is an inheritance from the colonial past of Suriname. Notwithstanding, it plays a significant role in the determination of economic policy in general, and economic cooperation in particular. Exports of agricultural produce for instance, is done by groups of businessmen not connected with production itself. In the case of timber, the overwhelming presence of a big processing company acts as a determining factor for the timber sector as a whole.

These facts are important to bear in mind, especially when considering that the CDCC's strategy is aimed to coordinate producers/exporters associations at a regional level. In Suriname, exporters are not producers and this should be taken as a fundamental factor which may hinder the CDCC objectives.

The findings related to each sub-sector for consideration in Suriname are as follows:

1. RICE

Exports of rice have fluctuated in Suriname with respect to the total value of exports of agricultural products since 1970. Although the exports of rice in volume have had a sustained increase since 1970. Table 1 shows the evolution of volume and value of rice exports and the percentage over the value of total exports.

Although the production of rice is done by farmers with holdings of different sizes, exports of rice are concentrated in those companies where the processing of paddy is performed. The biggest processing company is the "STICHTING MACHINALE LANDBOUW" and consequently it is the biggest exporter institution in Suriname. There is also a newly formed union of rice exporters consisting of a group of five small exporters which have some processing capacity.

It was said by Government officials at the Ministry of Trade that there is a big project of expansion of the area under rice cultivation. This project is also part of a land development scheme which attempts to settle farmers in holdings ranging from 15 to 24 hectares (37 to 60 acres). A total surface of 10,000 acres is planned to be cultivated with rice that may increase the production of rice to an additional 16,000 tons per year.

Research and development on rice are performed by Government-funded experimental stations whose results are transferred through extension services of the Ministry of Agriculture. Apparently, there have never been links or exchanges of information with the R and D unit of the neighbouring Guyana Rice Board.

## 2. LIVESTOCK

In spite of the obvious potential for livestock development, Suriname is still importing an important proportion of its meat requirements. Beef is imported from the USA and Australia. Pork is imported from Europe and occasionally from Guyana. The dairy industry cannot meet the local demand for fresh milk. Importation of milk powder is subsidized for the processing of a long-life type of milk.

Apparently, only the poultry production is large enough to satisfy local needs. However, it was said by officials at the Ministry of Trade that the poultry sector suffers shortages of fertile eggs from time to time. Although the hatching process is done locally, fertile eggs have to be imported mainly from the USA.

With regard to imports of beef, this is not surprising in Suriname, for the beef stock has declined constantly since 1970. Table 2 shows

TABLE 1

	1970	1971	1972	1973	1974	1975	1976	1977
Export of rice (tons)	16,119	32,054	30,706	44,479	41,274	58,818	57,459	54,716
Export of rice (in thousands of Suriname guilders)	5,206	10,001	8,598	20,594	21,421	33,291	27,753	30,915
Percentage of rice exports over total agricultural exports (in value terms)	%	%	%	%	%	%	%	%
	43	59	52	73	47	51	33	34

Source: AGRARISCH - STATISTISCHE GEGEVENS 1970-77

Ministerie Von Loudlow, Veeteelt En Visserig. April 1978.

TABLE 2

TOTAL AREA FOR CATTLE PRODUCTION AND HEADS OF CATTLE

	1970	1971	1972	1973	1974	1975	1976	1977
Total area in Ha	6,000	6,156	7,871	8,171	8,161	9,752	10,392	11,235
<u>CATTLE:</u>								
a) Total cows	18,200	15,600	14,900	11,800	14,000	14,000	13,500	13,500
- Dairy cows	6,673	5,720	5,463	4,327	5,133	5,150	4,950	4,990
b) Bulls	1,680	1,546	1,176	1,597	1,925	2,245	2,505	2,440
c) Young cattle								
<u>TOTAL CALVES:</u>	19,670	19,318	18,591	16,636	11,733	9,531	9,388	7,599
- Male	8,851	8,693	8,366	7,486	5,280	4,289	4,225	3,420
- Female	10,819	10,625	10,225	9,150	6,453	5,242	5,163	4,179
d) Oxen	150	136	33	67	42	24	32	36
e) Others	500	400	400	400	400	400	425	425
<u>TOTAL (a+b+c+d+e)</u>	40,200	37,000	35,100	30,500	28,100	26,200	25,850	24,000

Source: AGRARISCH - STATISTISCHE GEGEVENS 1970-77

Op. cit.

the evolution of the stock in eight years.

### 3. FISH AND CRUSTACEANS

Production and exports of shrimps, in Suriname, are concentrated in two foreign owned companies. Fish is not exported in any significant volume, thus remaining an artisanal-type of fishery as the only productive sector supplying other species apart from shrimps.

Of the two foreign companies operating from Suriname in the fishing of shrimps, one is a joint venture between Surinamese and Japanese investors. According to Surinamese officials, local investors participate in a 30% of the total shares of the SUJAFI Company. (Suriname and Japanese Fishery). This information was not confirmed though it was stated that of 190 trawlers operating from Suriname, 26 were locally owned and 19 state-owned. The other company, SAIL, is an American enterprise which has been operating from Suriname since the mid 1960's.

Table 3 shows the production and destination of the shrimps fished in Suriname and the participation of SAIL and SUJAFI Companies, respectively.

TABLE 3

PRODUCTION AND DESTINATION OF SHRIMPS

	1970	1971	1972	1973	1974	1975	1976	1977
1) PRODUCTION								
SAIL (tons)	n.a.	n.a.	n.a.	n.a.	1,438	2,162	2,965	2,717
SUJAFI (tons)	n.a.	n.a.	n.a.	n.a.	1,508	1,382	1,128	1,388
TOTAL PRODUCTION	3,423	2,921	3,306	3,614	2,946	3,544	4,093	4,105
2) EXPORTS								
SAIL (tons)	n.a.	n.a.	n.a.	n.a.	739	2,066	2,487	2,436
SUJAFI (tons)	n.a.	n.a.	n.a.	n.a.	1,508	1,382	1,128	1,388
TOTAL EXPORTS	3,081	2,629	2,975	3,253	2,247	3,448	3,615	3,824
EXPORTS AS PERCENTAGE OF TOTAL PRODUCTION	%	%	%	%	%	%	%	%
	90	90	89.9	90	76.3	97.3	88.3	93.2
NO. OF TRAWLERS	52	45	60	104	150	150	190	190

Source: AGRARISCH - STATISTISCHE GEGEVENS, op. cit.

Statistical data shows that the fishery of shrimps is almost totally oriented towards export in Suriname. The fact that production is concentrated into foreign-owned companies adds to the fisheries, a characteristic of an enclave sector. In fact, local trawlers do not count for more than 14% of the total fleet in operation. Local labour inputs of the processing factories of shrimps are not significant either. Additionally, officials at the Ministry of Agriculture pointed out, during the visit, that programmes set up to train local people in trawler operation have not been successful. Apparently local workers have not been interested in joining training programmes for their later incorporation into the fisheries sector.

#### 4. TIMBER

The timber sector in Suriname, notwithstanding its great export potential, accounts for only 3% of total exports at the present time. Since 1947, there has been a systematic exploitation of Suriname's forests. An ordinance was issued with the purpose of promoting timber production. Concessions were given to sawmillers free of charge. In 1958, a special ordinance on timber was issued to regulate the cutting and sawmilling of forests. At the Ministry of Development, a department was set up to control timber production by means of the issuance of licences which operated in two ways: first, concessions were given to sawmillers for a period of ten years over certain areas; and second, cutting permissions were granted to contractors for shorter periods.

At the present time, there are about 150 concessions given to contractors who sell the logs to sawmillers. According to officials at the Suriname Forest Service, there are about 30 sawmills in operation and the majority of them also have concessions for the cutting of trees.

The cutting of trees in Suriname, is done in a selective way. No more than 10% of trees are cut per hectare. The reason for this comes from the fact that only 10% of the varieties of timber has a commercial value. At the present time, about 13 to 15 varieties of timber are cut. Every year about 15,000 hectares of natural forest are harvested and at a rate of 10 to 15 cubic metres per hectare, the total cutting accounts for about 200,000 cubic metres per year.

According to officials at the Suriname Forest Service, the cutting and sawing of timber is a highly profitable venture. The costs of production were estimated at 70 to 100 guilders per cubic metre while selling prices of timber can reach as much as 180 to 350 guilders per cubic metre, depending on different qualities of timber.

On the processing side, there is also a degree of concentration. Although about 30 sawmills are in operation in Suriname, the further processing of logs into products such as boards of various dimensions, floor parquets, plywood, cheap boards and even pre-fabricated houses is done only by a few companies. The biggest in Suriname is BRUYNZEEL. This company is partially owned by the State, though the management is performed by the private shareholders.

As in the case of Guyana, the rate of utilization of trees has been estimated at 50% by officials at the Forest Service. There is, however, a project with the participation of a Norwegian Company aimed at the production of 6,000 tons of charcoal from the cutting and sawmilling waste. FAO proposed a pilot project in 1973 to improve the rate of recuperation of waste. It is worth pointing out that of a forest exploitation, about 10% may be used as timber, the remaining 90% is wood which can be used as either raw material for pulp production or charcoal. Additionally, from the gases resulting in the charcoal production, alcohols and other chemical components may be recuperated.

Finally, with regard to institutional changes in the forest sector, it was pointed out by the FAO expert that he is recommending the establishment of a Timber Board. This initiative was confirmed by other Surinamese officials though it was estimated that a new bill to create a regulative body for the timber sector might take more than a year to be finally passed.

Note: A book published by the State Forest Industries Inc., is enclosed with this report.

##### 5. OILS AND VEGETABLE FATS

Since 1970, Suriname has been expanding the production of palm oil constantly. The surface planted with palm trees has increased quite substantially. Production and exports started in 1974 (see Table 4).

According to Government officials at the Ministry of Trade, it has projected an area of 20,000 hectares to be planted by 1980. The production of palm oil started with the aim of substituting imports of domestic oils. Nevertheless, the expansion programme is considering a substantial increase in exports. The processing capacity has also been expanded. A new company, namely, Victoria Company has recently been in operation in Suriname, to process the palm oil which is now exported.

TABLE 4  
AREA, PRODUCTION AND DESTINATION OF PALM OIL

	1970	1971	1972	1973	1974	1975	1976	1977
Planted Area (Ha)	50	330	840	1,215	1,435	1,645	1,710	1,880
Area under Production (Ha)	-	-	-	-	200	530	780	1,296
PRODUCTION:								
Bunches (1,000kg)	-	-	-	-	650	3,225	6,650	9,350
Palm Oil (raw)	-	-	-	-	130	625	1,330	1,870
Nuts (1,000 kg)	-	-	-	-	-	-	300	421
EXPORTS:								
Palm Oil (raw) (1,000 kg)	-	-	-	-	130	625	1,330	1,132

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Source: AGRARISH - STATISTISCHE GEGEVENS 1970-1977 op. cit.

It has been said earlier on that in Suriname, the institutional structure corresponds to a free market economy. The State does not control or regulate, as opposed to the English-speaking Caribbean countries, the export activities. The historical development of institutions, in Suriname, did not evolve to the creation of Statutory Bodies, or Central Boards or the like. The non-interventionist character of the State might change in the future. A Marketing Board has been suggested by farmers to regulate local supplies of foodstuff and eventually coordinate and stimulate exports. A Timber Board has been recommended by FAO to regulate and promote the development of the timber sector.

Unfortunately, during the mission's visit, private producers and/or exporters were not contacted. They were either non-available or too distant from Paramaribo. The willingness to cooperate and participate in regional structures, from the rest of Suriname, was only expressed by Government officials. This may well represent a partial view for no private producer or exporter was contacted during the visit.

TRINIDAD AND TOBAGO

The mission's work in Trinidad and Tobago was extended to four days. Agricultural exports in Trinidad have been declining rapidly since 1970. Exports of traditional crops, namely sugar, cocoa beans, coffee beans and citrus products have dropped considerably since 1970. The only exception to this decline is copra and copra products. Although there has been a decline in the total supply of copra and raw oil, the production of edible oil, lard, margarine, laundry soap and toilet soap has remained the same. Decline in local copra and raw oil has been compensated by an enormous importation of raw oil of about four times. A detailed description of the findings according to the original items in the agenda follows:

1. GRAINS

Trinidad is a net importer of grains. Corn, rice and legumes are subsidized to consumers. Subsidies are made effective through the Central Marketing Agency (C.M.A.).

a) CORN This crop is subsidized by the C.M.A. The corporation operates a guarantee price scheme to local producers of corn. In addition to this, it imports some corn occasionally. The guarantee price for corn was fixed at 36 cents per pound, the price to consumers is 25 cents per pound. Imports of corn, from U.S.A. reached 151 million pounds in 1976. Barbados has also supplied Trinidad with some corn in the past. It is known that there is a development plan for corn production in State land (Waller Field). However, the results of the aforementioned project are unknown.

b) RICE It is also imported in large quantities. In 1976, Trinidad imported 67.2 million pounds of bulk rice and 4.1 million of packaged rice. Most of the imports came from Guyana. The local production of rice is again bought by the C.M.A. at a guarantee price which means a subsidy of about 30% over the retail price of rice. During interviews at the Division of Planning, Ministry of Agriculture, it was expressed by officials that a plan is under revision for a bigger involvement of the Government into the boosting of rice production.

It is thought that low lands at the "Nariva Swamps" could be dried and seeded with rice under total State administration.

c) LEGUMES Production of legumes (pulses) has remained constant, (See Table 1) since 1970. This has affected local supply which has had to be complemented with import items such as pigeon peas, red kidney beans and other peas and beans have been increasingly imported since 1970. (See Tables 57 and 58 of the Quarterly Agricultural Report, October-December, 1977). At the forementioned level, a project for a massive production of legumes and vegetables has been discussed. It would, eventually involve the shift of sugar land into other crops. A new institution would be required, though. It is thought that a "National Agricultural Corporation" could take over about 3,000 acres of land for such a purpose. No decision has been taken on this line, as yet.

It should be pointed out, that the local production of pulses is made in extremely small holdings, not larger than three acres. Economies of scale are non-existent. Furthermore, farmers work the land on very individualistic grounds. There is no cooperation in terms of machines, and other basic inputs. Technology is a problem here, for increases in productivity are related to increases in inputs which would involve larger holdings. Research has been done on the possibility of introducing new technologies and techniques from countries such as Japan and Korea. So far, no results reflecting increases in local production have been produced.

## 2. TIMBER

In spite of some forest resources, Trinidad is importing timber particularly from Canada, USA and Guyana. Nevertheless, it should be pointed out that a re-forestation plan is being implemented.

## 3. OILS AND FATS

In spite of the decline in the production of copra, the manufacturing of oils and fats, including soaps, has increased. Table 1 shows the evolution of copra production from 1970 to 1977. Table 18 in the Quarterly Agricultural Report shows the evolution of manufactured products. Processed products namely, edible oil, lard, margarine, laundry and toilet soap have increased mainly due to increases in the importation of raw oil.

In 1977, according to the Central Statistical Office (CSO), about 76,600 pounds of copra had to be imported from St. Vincent.

The declines in the supply of local copra have been explained for two reasons: first, a general decline in agricultural production because of labour costs and unavailability of labour inputs; and secondly, in the particular case of copra, there is a higher demand for green coconuts in Trinidad. This, of course has generated a drop in the coconuts available for drying, thus the fall in the supply of copra.

Processing of copra, in Trinidad is performed by both Lever Brothers Company and the Coconut Growers' Association. Lever Brothers buy raw oil from the Association for they have the monopoly for the production of lard, margarine, edible oil and soaps. It is worth mentioning that manufactured products coming from copra are exported by Lever Brothers to other CARICOM countries (See Table 17 - Quarterly Agricultural Report).

#### 4. FISH CRUSTACEANS

Production and export of fish and crustaceans in Trinidad and Tobago has increased substantially since the early 1960's. At the present time, the total fleet of trawlers operating from Trinidad is about 90 vessels. The State owns through the National Fisheries Company, about 26 trawlers; additionally there are some 70 private trawlers which are licensed to fish. In Trinidad and Tobago, there are three processing plants, one owned by the Government and two that are privately owned. The total capacity of cold storage is over 2,000 tons. One of the plants has a fish meal plant.

The exports consist mainly of shrimps. The heads of the latter are taken off and then the shrimps are packed and frozen and put in plastic bags ready for export. The fishing of shrimps has meant that Trinidad has jumped from an artisanal type of fishery to an off-shore fishery. Trawlers are now operating in Brazilian, Surinamese and Guyanese waters, more than 1,000 miles from their base.

In addition to shrimps, the Fisheries Division, has launched a programme of development for the fishing of flying fish, snappers

and some pelagic species. Flying fish seems to have the largest potential, because of the demand from the local market and outside the region.

It is worth mentioning that fisheries in Trinidad and Tobago are developing beyond the limits of an artisanal type of activity. It is definitely a capitalist type of fishery. Produce is fished for the market. This up to a certain extent, has been promoted by a financial policy coming from the State. Soft loans are available to fishermen with rates of 3% and long terms from the Agricultural Development Bank. There are also subsidies which affect the purchasing of boats, engines, nets and other implements. Rebates on oil and gasoline are also offered by the Government. This policy has promoted an "individualistic" attitude of fishermen who are very much involved in competing with each other than cooperating. Fishermen cooperatives are scarce and definitely not supported by the Government. The argument is that the requirements of the market have gone beyond the artisanal type of fisheries which is more suitable to cooperatives development. So far, in Trinidad and Tobago there is neither a Fishermen or Fisheries Association nor a Federation of Fishermen Cooperatives.

It should be pointed out that the Government of Trinidad and Tobago established in 1975 a training centre in fisheries which was originally supported by the Governments of Guyana and Barbados. The training centre, supported technically and financially by FAO did not train any student during 1978. It has been argued that youngsters are not interested in fishing, in spite of the sector's profitability. So far in 1979, the centre is expected to start training some students. Guyana, however, has disengaged itself from the agreement and nowadays Guyanese fishermen and trawler operators are taught either by Cuban trainers in Guyana or trained at training centres in Cuba.

##### 5. LIVESTOCK

Trinidad and Tobago is a net importer of meat and dairy products. Only the production of poultry has increased enough to meet local demand. Nevertheless, from time to time there are shortages of chicken, particularly during the Christmas and Carnival seasons (See Table 1).

a) BEEF Trinidad and Tobago has to import a substantial proportion of its beef requirements. Local production of beef has declined since 1970, (see Table 1), mainly due to the fact that beef meat is a by-product of the dairy industry. In other words, cattle in Trinidad and Tobago is particularly oriented to the production of fresh milk; therefore, beef meat comes only from rejects of cattle from the dairy sector. Production cannot increase very much either. The land available is very limited for a horizontal-type of expansion. It is however thought that intensive breeding could be attempted in the country; for at the present time, only one animal per acre is bred. This proportion could be doubled if proper programmes of development are implemented. With regard to the origin of imports, Trinidad and Tobago has imposed a ban on all imports coming from South America, because of the foot and mouth disease, thus affecting imports coming from Guyana. This has compelled that beef imports have to come from Australia, New Zealand and the USA.

b) PORK There is also a large proportion of pork which has to be imported mainly from the USA. The Government has concluded a programme for the development of pork production. Subsidies, as high as 34% of total costs have been given to pig farmers to foster production. There have been some difficulties in the development programme because of shortages of foodstuff and farm management inefficiencies.

c) POULTRY Production of broilers has increased consistently in the last eight years. However, it should be noted that the Government policy has been mainly oriented to substitute imports. At the present time, farmers receive a subsidy of about 35% of total production costs in broilers and table eggs. This of course, has to be taken into consideration if surpluses are to be exported in the future, which seems very unlikely.

## 6. COCOA AND COFFEE

Exports of cocoa and coffee beans have declined consistently during the 1970's. Nevertheless, the Cocoa and Coffee Growers Association is still processing beans for export and supply of local manufacturing plants. It is thought that a rehabilitation and replanting programme

is needed. However, due to increasing costs of labour, exports and local supply of both cocoa and coffee may become uncompetitive because of necessary increases in prices that the rehabilitation will generate.

7. CITRUS

Production and exports of citrus have also declined during the 1970's. The situation and conditions for a fostering in the production and exports are very similar to that of cocoa and coffee. Trees need rehabilitation and replanting, and the present labour costs in Trinidad and Tobago discourage investment in that area. The exports of citrus -grapefruits in particular - is becoming increasingly unprofitable because of the abandonment of trees. The Citrus Association is expecting to negotiate with the Government for better credit conditions to encourage farmers to rehabilitate trees. The Government, for its part, has initiated a programme oriented towards increasing productivity of trees, by starting to train virologists and agronomists specialized in citrus test controls and trees' management. However, no immediate results can be expected, for it takes seven to nine years for a tree to reach maturity.

With regard to other agricultural produce, such as vegetables and ground provisions (root crops) Table 1-b shows the evolution of domestic production. There has been some increase but it has not been enough to meet local demand. The Central Marketing Agency acts as the biggest distributor and importer of fruits and vegetables, for the food subsidies are applied through the CMA.

It should be pointed out that the idea of regional cooperation and associations was welcomed in Trinidad and Tobago, providing that agreements already existing within CARICOM did not clash. At the Citrus Association and the Cocoa Growers' Association, the prospects for stronger cooperation in the region were particularly welcome. The revival of the British Caribbean Citrus Association is considered desirable in the immediate future. As for initiating links with other citrus growers in the CDCC area, particularly Cuba, the Trinidad and Tobago Association showed great interest.

Note: included in this report is: Table 1 Statistical data  
"Domestic Agricultural Production 1970-1977" Division of Planning,  
Ministry of Agriculture.

Interviews were held in Trinidad and Tobago with the following  
persons:

Mr. A. Rudder	Director, Division of Planning, Ministry of Agriculture
Mr. K. Singh	Officer, Division of Planning, Ministry of Agriculture
Mrs. L. Rashtogi	Officer, Division of Planning, Ministry of Agriculture
Mr. H. Woods	Director, Fisheries Division
Mr. R. Kangaloo	Registrar of Cooperatives
Mrs. J. Pierre	Deputy Registrar of Cooperatives
Mr. A. Mohammed	Deputy Manager, Central Marketing Agency
Mr. B. James	Officer, Central Statistical Office
Mr. E. de Verteuil	Manager, Citrus Growers' Association
Mrs. P. Gonzalez	Director, Cocoa Growers' Association

