RECENT TRADE PERFORMANCE OF CARIBBEAN COUNTRIES
# Table of Contents

Executive Summary

INTRODUCTION ......................................................................................................................................1

1. CDCC trade with the Andean Community .........................................................................................2

2. CDCC trade with the Central American Common Market (CACM) .................................................6

3. CDCC trade with MERCOSUR .........................................................................................................10

4. CDCC trade with Chile ....................................................................................................................14

5. CDCC trade with NAFTA ................................................................................................................16

6. CDCC trade with the European Union (EU) ...................................................................................21

7. CDCC trade balance with the European Union ...............................................................................25

CONCLUSION .........................................................................................................................................27

STATISTICAL ANNEX .........................................................................................................................29
Executive Summary

The paper analyzes the evolution of trade patterns of the countries comprising the Caribbean Development and Cooperation Committee (CDCC) with the following integration groupings: Andean Community, the Central American Common Market (CACM), the Southern Cone Common Market (MERCOSUR), the North American Free Trade Agreement (NAFTA) and the European Union (EU) in the 1990s.

CDCC trade with the Andean Community was relatively small compared to that with Europe or NAFTA. Non-CARICOM CDCC member countries were dominant in the Andean market with the average value of their exports being more than double that of their of CARICOM counterparts. The Dominican Republic accounted for 41 per cent of CDCC’s imports.

CDCC trade with the CACM grouping continues to be relatively sparse and contained. Ninety-one per cent of total CDCC exports to the CACM are from the non-CARICOM countries, with 72 per cent coming from the Netherlands Antilles.

CDCC trade with MERCOSUR was relatively small compared to that with NAFTA and the EU since CDCC exports to MERCOSUR do not enjoy any preferential treatment as they do with the aforementioned groupings. Within MERCOSUR, Brazil and Argentina dominate trade with CDCC. Like that of the previous groupings, non-CARICOM CDCC countries constituted the major part of the CDCC exports to this grouping.

Trade between CDCC and Chile was dominated by the non-CARICOM CDCC countries, accounting for some 83.4 per cent of total CDCC exports, with the CARICOM countries accounting for the remaining 16.6 per cent. Within the latter grouping, exports to Chile were largely accounted for by Trinidad and Tobago while non-CARICOM CDCC exports originated from only three countries: the Netherlands Antilles, the Dominican Republic and Haiti, with the Netherlands Antilles’ exports constituting 45 per cent of CDCC’s total exports. On the imports side, the non-CARICOM CDCC countries accounted for 93.9 per cent of total CDCC imports.

Trade was heavily concentrated in the NAFTA grouping, in particular with the United States, which remained by far the dominant trading partner for the CDCC countries. In this case, the CARICOM countries accounted for the bulk of CDCC exports, in fact these exports represented almost two thirds of total CDCC trade. These exports were dominated by the MDCs of the CARICOM subgroup, particularly Trinidad and Tobago and Jamaica. Similar to its exports, CDCC imports from NAFTA were dominated by the CARICOM countries which accounted for an average 60.4 per cent of the total, with the non-CARICOM countries taking 39.6 per cent.

CDCC trade with the EU recorded moderate growth of 4.7 per cent per year. Among the CDCC subgroupings, CARICOM exports represented 86 per cent of the total for the CDCC countries, accounted for largely by the exports of the larger non-OECS countries. Within the non-CARICOM CDCC group of countries, trade flows to the EU were recorded for the Dominican Republic and Haiti only. CDCC exports and imports from the EU are strongly influenced by the established patterns of comparative advantage and disadvantage and historical linkages. As a result, CDCC exports to the EU are made up of primary products, while their imports tend to be concentrated in manufactured goods.

The composition of CDCC trade is determined by its production structure, while preferential trading arrangements and historical links influenced its direction of trade. Despite repeated attempts at diversifying their economies, both in terms of products and markets, CDCC exports remain highly concentrated on a narrow range of relatively low value added primary products and manufactured goods, which are principally exported to North America and the EU. The United States remain, by far, the dominant partner for these countries.
RECENT TRADE PERFORMANCE OF CARIBBEAN COUNTRIES

INTRODUCTION

The comparative advantage of member States of the Caribbean Development and Cooperation Committee (CDCC) lies in the production and export of primary products. The countries import most of their manufactured goods and machinery. Despite repeated attempts at economic diversification, the production and trade of CDCC countries continue to be highly concentrated both in terms of the range of products produced and traded and the markets in which they are traded. This high level of concentration in the exchange of relatively low valued goods continues to be one of the main factors behind the vulnerability of these countries to commodity price shocks and slow growth in the main markets for their exports.

Trade in CDCC countries evolved with a heavy reliance on a system of preferences. These include the Lomé Convention, which offers preferential prices and quota guarantees for sugar, bananas and rum into the European market, the Caribbean Basin Initiative (CBI) which ensured preferences for a range of goods into the United States market and CARIBCAN which offered favourable access to the Canadian market. However, these preferences encouraged the development of an import substitution model of industrialisation, which failed to fulfil expectations in terms of competitive industrial output and exports.

In recognition of their weak export performance, CDCC countries have attempted, moreso, within the last two decades, to open up their economies through market-driven reforms, trade liberalisation, structural adjustment and other policies. Countries, such as Trinidad and Tobago and the Dominican Republic, which have undertaken the most forward-looking reforms, have seen growth in exports and strengthened competitiveness. However, while Trinidad and Tobago has realised gains in productivity and competitiveness in higher value added petrochemical products (including liquid petroleum gas, ammonia, urea and fertilizers) and light manufactured goods (namely, wood products, iron and metal rods), growth in exports of the Dominican Republic resulted primarily from the expansion of output of light manufactures in Export Processing Zones (EPZs). Unfortunately, though, most of the other CDCC countries have failed to realise any significant gains in the penetration of export markets.

The objective of this study is to trace and analyze the evolution of trade patterns among CDCC1 countries and the major trading blocs in the Western Hemisphere during the 1990s. Consequently, CDCC trade with the Andean Community, the Central American Common

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1 The groups of countries referred to in this study are as follows: non-OECS CARICOM (Bahamas, Barbados, Belize, Guyana, Jamaica, Suriname and Trinidad and Tobago), the OECS countries (Antigua and Barbuda, Dominica, Grenada, Montserrat, St Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, non-CARICOM CDCC countries (Aruba, Anguilla, Cuba, Dominican Republic, Haiti and Netherlands Antilles).
Market (CACM), the Southern Cone Common Market (MERCOSUR), the North American Free Trade Agreement (NAFTA) and the European Union (EU) is examined. The study arises out of the awareness that, given the importance of regionalism in the broader framework of global trade and financial liberalisation, small States, such as those of the CDCC, need to examine their current trade performance with these blocs and to rethink their strategies for maximising export growth and other gains from trade.

1. CDCC trade with the Andean Community

CDCC countries' trade with the Andean Community was relatively small compared with the value of trade with Europe and NAFTA. CDCC's exports to the Andean Community averaged US$159.5 million between 1990 and 1998 (see Table I below). Non-CARICOM countries were the dominant penetrators of the Andean market with over 68 per cent of CDCC's exports to that market. Among these countries, Haiti's exports, which averaged US$48.9 million per year, accounted for 31 per cent of the CDCC's total. The Netherlands Antilles sent US$33.4 million worth of goods to the Andean Community, thereby accounting for 21 per cent of the CDCC's total. Meanwhile, exports of Cuba and Aruba at yearly averages of US$14.0 million and US$11.0 million made up 9 per cent and 7 per cent, respectively.

The average value of exports of Caribbean Community (CARICOM) countries was less than half that of their non-CARICOM counterparts. Although CARICOM exports registered strong annual growth of 32 per cent, the low base from which this growth began (US$2.9 million in 1990), meant that the absolute level of exports by 1998 (US$56.7 million) was still fairly low. In fact, CARICOM's exports averaged a modest US$50.2 million over the period. Countries outside of the Organization of Eastern Caribbean States (OECS) grouping exported an average of US$46.8 million worth of goods per year to the Andean Community, 93 per cent of the CARICOM total and 29 per cent of the CDCC total. Non-OECS countries' exports were dominated by Trinidad and Tobago, which exported US$32.9 million worth of goods, 70.33 per cent of the total for the subgroup to the Andean Community. Trinidad and Tobago's exports, reflecting its production structure, consisted largely of petrochemical products. Exports of the other non-OECS States were marginal. Exports from Barbados, 4 per cent of the total, only averaged US$6.2 million per year, while the annual averages for the Bahamas, Jamaica and Guyana were US$2.9 million, US$1.8 million and US$1.7 million, respectively.

OECS countries exported a meagre US$3.4 million worth of goods per year to the Andean Community. Only Antigua and Barbuda, with average yearly exports of US$3.3 million, had exports of any note. All the other countries sent less than US$0.1 million worth of goods to the Andean community.
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Value of CARICOM Exports to the Andean Community 1990-1998 (US$000)

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Source: IDB Database and CARICOM Trade Statistics
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Source: IDB Database and CARICOM Trade Statistics
CDCC countries imported an average of US$2,225.2 million worth of goods per year from the Andean Community. Non-CARICOM countries accounted for an average share of 54.0 per cent (US$1,212.1 million) of the goods imported from the Andean Community. The share of this subregion declined from 75.8 per cent in 1990 to a low of 32.7 per cent in 1994; then rose to 57.8 per cent in 1998. The Dominican Republic, which accounted for 41 per cent of CDCC’s imports, bought an average of US$903.5 million worth of goods per year from the Andean Community. Imports to the Dominican Republic registered strong growth of 40.8 per cent per annum. Cuba and the Netherlands Antilles, whose imports averaged US$206.0 million and US$57.0 million, respectively, accounted for 9 per cent and 3 per cent of the CDCC’s total. The fairly large shares for the Dominican Republic and Cuba reflect the establishment of trading links based on common language and cultural ties. The non-OECS CARICOM countries had an average share of 45 per cent of the CDCC’s total (US$1,004.4 million). Their share rose from 23.5 per cent in 1990 to reach a peak of 67.0 per cent in 1994, then contracted to 41.9 per cent in 1998. Of these countries, Suriname’s imports averaged US$614.5 million, 28 per cent of the CDCC’s total. Imports to Suriname recorded substantial growth from US$20.2 million in 1990 to US$1,257.4 million in 1998. Trinidad and Tobago bought goods whose value averaged US$247.1 million, 11 per cent of the share for the CDCC as a whole. Jamaica’s imports declined steadily between 1990 and 1994, but rebounded to register average yearly growth of 14.3 per cent. Jamaica accounted for 5.0 per cent of the imports to the CDCC countries (US$104.0 million), a disproportionate share relative to its size.

Underscoring their weak trade linkages with the group, OECS countries imported a mere US$8.7 million worth of goods from the Andean Community. And although OECS imports grew on average by 22.0 per cent, they were less than 1 per cent of the total for the CDCC. Only Antigua and Barbuda, Saint Lucia and Grenada, with average yearly imports of US$2.5 million, US$2.5 million and US$2.4 million, had imports of note from the Andean grouping.

The CDCC countries recorded persistent balance of trade deficits with the Andean Community over the period under review (see Annex 1). The trade deficit for these countries averaged a substantial US$2,065.7 million per year over the period. In addition, the deficit grew from US$1,045.2 million in 1990 to US$4,599.4 million in 1998. Although the non-CARICOM countries had relatively strong average growth in exports, the significant disparity between exports and imports due to the large absolute levels of imports resulted in a chronic average deficit of US$1,102.8 million, 53 per cent of the total for the CDCC. In 1990, these countries accounted for 73.7 per cent of the total deficit of the CDCC, but by 1998 this figure had fallen to 58.1 per cent. The average deficit of the Dominican Republic was a substantial portion of the total for these countries, and a full 44 per cent of the total for the CDCC. At the same time, the average deficit of Cuba at US$191.9 million represented 9 per cent of the total for the CDCC. The other countries, including Aruba and Haiti, had average deficits that represented 1 per cent each of the CDCC total.

The trade deficit of CARICOM expanded from US$273.1 million in 1990 (26.1 per cent of the CDCC’s total) to US$1,926.3 million in 1998. CARICOM’s deficit averaged US$962.9 million over the period and 47 per cent of the total for the CDCC. The deficits were driven overwhelmingly by the non-OECS countries, which had an average deficit of US$957.6 million, over 99 per cent of CARICOM’s total and 46 per cent of the CDCC’s total. Among the non-
OECS countries, Suriname had an average deficit of US$613.7 million, 30 per cent of the total for CDCC. Suriname’s deficit grew rapidly due to yearly growth in exports of 1 per cent, compared with 28 per cent for imports. The deficit for Trinidad and Tobago was 10 per cent of the total for the CDCC, and averaged US$214.1 million per year. Jamaica and Barbados had average trade deficits of US$102.2 million and US$21.8 million, 5 per cent and 1 per cent of the CDCC’s total, respectively.

OECS countries had marginal, but growing, deficits with the Andean Community. The absolute levels of the deficits reflected the negligible trade of the OECS on both the export and import side with this grouping. The OECS trade deficit almost doubled from US$7.9 million in 1990 to US$14.1 million in 1998. Their average deficit was lower though, at US$5.3 million. Among the OECS member States, Dominica, Saint Lucia and Grenada had average deficits of US$2.5 million, US$2.4 million and US$2.3 million, respectively. However, Antigua and Barbuda had an average surplus of US$2.9 million.

2. CDCC trade with the Central American Common Market (CACM)

CDCC’s trade with the CACM continues to be relatively small. Trade patterns between the CDCC and this grouping is influenced by historical factors, language differences for some countries and the scarcity of established linkages. These factors are manifested in the fact that 91 per cent of total CDCC exports are to the non-CARICOM countries, with the overwhelming share of 72 per cent coming from the Netherlands Antilles. The Netherlands Antilles’ exports to CACM averaged US$215.6 million over the nine years under review. The country’s exports varied fairly widely, though, ranging from a minimum of US$22.2 million in 1992 to a maximum of US$461.1 million in 1998. Among the other non-CARICOM countries, Haiti with 10 per cent and Aruba 4 per cent of the CDCC’s total were the other major exporters. Haiti’s exports averaged US$29.1 million over the period, while Aruba’s averaged US$11.5 million.

Total exports of CDCC countries to the CACM averaged US$300.7 million over the period. The region’s exports grew at a vibrant 27.2 per cent per year, from a relatively low base of US$105.4 million to US$589.1 million.

CARICOM’s penetration of the CACM export market was noticeably weak. Although CARICOM’s exports grew at a rather strong yearly rate of 42 per cent, the average value of its exports at US$27.3 million was quite small, compared with exports to the EU and NAFTA. Exports of the larger CARICOM countries averaged US$26.7 million, 9 per cent of the total for the CDCC. This reflected largely the exports of Trinidad and Tobago (4 per cent of the CDCC’s total) and Suriname (3 per cent of the CDCC’s total).
### Table III

Value of CDCC Exports to the Central American Common Market (CACM) member countries 1990-1998 in US$'000

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Source: IDB Database and CARICOM Trade Statistics
Underscoring the limited trade and transportation links, competitive nature of their production structures, concentration of OECS’ trade with the EU and NAFTA and weak OECS competitiveness, the trade of these States with the CACM was negligible. In fact, OECS exports to this bloc averaged a marginal US$0.53 million per year over the nine years under review. Indeed, only Saint Vincent and the Grenadines and Grenada had any trade flows with the CACM bloc.

CDCC countries’ imports from CACM averaged less than a third of their exports to the Central American bloc. Imports averaged US$95.9 million over the nine-year period, and ranged from US$65.9 million in 1991 to US$153.5 million, in 1996. Similar to the case for exports, the non-CARICOM countries were the greater consumers of CACM’s imports, with 60 per cent of the CDCC’s share. This subregion’s imports averaged US$57.6 million per year, and grew at an average annual rate of 14.6 per cent over the nine years. The Dominican Republic’s imports, which represented 25 per cent of the total for the CDCC, averaged US$24.1 million. Haiti’s imports amounted to just over half that of the Dominican Republic’s at US$13.1 million, but posted strong yearly growth of 26.2 per cent. The fairly wide dispersion in the value of Haiti’s yearly imports was reflected in the range, from US$6.6 million in 1990 to US$19.6 million in 1996. This fluctuating pattern is characteristic of the trade patterns of most CDCC countries. It is a manifestation of the link between their domestic propensity to export and import, and growth in demand in their trading partners and changes in domestic supply and productivity. Meanwhile, Cuba accounted for 13 per cent of CDCC’s imports from the CACM bloc. At an average of US$12.1 million, though, Cuba’s imports were still relatively small.

The restricted nature of CARICOM’s trade with the CACM was exhibited in weak propensity to import from this area. Imports of CARICOM from the region averaged US$38.3 million per year. Moreover, although imports from this bloc grew at over 15 per cent per year, they represented a small portion of CARICOM’s total imports. Imports from the region ranged from a low of US$19.8 million in 1991 to US$65.4 million in 1998. Jamaica’s imports, which comprised 16 per cent of the total for CDCC, averaged a modest US$15.8 million per annum. Jamaica’s imports recorded growth of 8.9 per cent per year, but fluctuated from year to year depending on the capacity to purchase and other factors. Imports to Belize and Trinidad and Tobago accounted for 8 per cent and 6 per cent of the CDCC’s total, respectively, and averaged US$7.4 million and US$6.0 million.

As with their exports, the OECS countries were marginal importers from the CACM. OECS imports from the bloc averaged only US$3.8 million per year, just 4 per cent of the total for the CDCC countries. Only Saint Lucia, with average imports of roughly US$2.0 million, had imports of note. Among the other countries, Grenada and Dominica imported goods valued at averages of US$0.75 million and US$0.57 million.
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Source: IDB Database and CARICOM Trade Statistics

Notably, the CDCC countries had a relatively large average trade surplus of US$204.8 million with the CACM group. The surplus ranged from a low of US$25.9 million in 1992 to a high of US$450.4 million in 1998. The net surplus was wholly accounted for by the non-CARICOM States, which posted a strong average surplus of US$215.8 million. The Netherlands Antilles recorded a surplus of US$212.9 million, 98.7 per cent of the total for the non-CARICOM CDCC countries. Haiti registered a surplus of US$16.0 million, 8 per cent of the total for the subgroup. Meanwhile, the Dominican Republic posted a deficit of US$16.0 million, 8 per cent of the total for the subregion.
CARICOM recorded an average deficit of US$11.0 million, 5.0 per cent of the surplus of the CDCC as a whole. The deficit contracted from US$24.3 million in 1990 to US$19.1 million in 1998. Jamaica had a deficit of US$14.8 million, while Belize and Barbados had average deficits of US$6.2 million and US$2.8 million, respectively. These deficits were partially offset by surpluses of US$9.3 million and US$6.9 million for Suriname and Trinidad and Tobago. The OECS States recorded an average deficit of US$3.2 million per year with the CACM bloc. The deficit shifted upwards from US$1.7 million in 1990 to US$6.8 million in 1998. Saint Lucia recorded a deficit of roughly US$2.0 million, while Grenada and Dominica registered deficits of US$0.7 million and US$0.6 million. Meanwhile, Saint Vincent and the Grenadines garnered a small surplus of US$0.2 million.

3. CDCC trade with MERCOSUR

CDCC countries’ trade with MERCOSUR was relatively small compared to that with NAFTA and the European Union. This is not surprising since CDCC exports to MERCOSUR do not enjoy any preferential treatment as is the case with the EU and NAFTA. CDCC countries’ trade with the integration group is dominated by the two largest economies of southern Latin America, Brazil, and, to a lesser extent, Argentina. Brazil remains, by far, the largest trading partner for CDCC countries accounting for more than 95 per cent of trade with the Caribbean countries, with Argentina accounting for the remaining 3-5 per cent.\(^2\)

In value terms, CDCC’s merchandise exports to MERCOSUR, which amounted to US$102.2 million in 1990 more than doubled to US$208.1 million in 1996, and then dropped substantially to its 1990 value of US$102.2 million in 1997 (see Table V). The decline in exports in 1997 could be attributed to the contagion effect of the Asian crisis, which was mostly felt in Brazil and which may have had a negative effect on aggregate demand. In 1997 alone, CDCC exports to MERCOSUR contracted substantially by 50.9 per cent.

The average value of non-CARICOM CDCC countries’ exports to MERCOSUR was US$107.4 million, constituting 56.5 per cent of total CDCC exports. Within this group, the Netherlands Antilles remains the largest exporter to MERCOSUR, selling an average US$74 million worth of goods yearly during the 1990-97 period. The exports of non-CARICOM countries rose steadily from US$44.7 million in 1990 to US$113.4 million in 1996, and then declined by 34.3 per cent to US$74.5 million in 1997. Cuba’s exports, which were predominantly destined to Argentina, recorded an increase of US$7.0 million in 1996 up from US$1 million in 1990, and then declined by a relatively significant US$4.0 million in 1997. Aruba, Haiti and the Dominican Republic recorded negative average annual growth rates of 2.7 per cent, 12.2 per cent and 0.5 per cent, respectively, during the period. However, these negative average annual growth rates were more than offset by the positive growth of Cuba and the Netherlands Antilles, such that the overall growth rates for the non-CARICOM CDCC was a positive 28.8 per cent.

\(^2\) CDCC’s trade with the smallest economies within MERCOSUR, Paraguay and Uruguay is too small to warrant any substantive analysis.

\(^3\) This refers to the following countries; Aruba, Cuba, Dominican Republic, Netherlands Antilles and, to a lesser extent, Haiti.
Table V  
CDCC exports to MERCOSUR  
(US$000)

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<th>SURINAME</th>
<th>TRINIDAD &amp; TOBAGO</th>
<th>OECS</th>
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Source: IDB database.

The exports of the CARICOM countries to MERCOSUR averaged US$82.2 million annually, which was 43.2 per cent of CDCC total exports, with the OECS accounting for slightly less than 2.8 per cent. Suriname was the largest exporter to MERCOSUR, followed by Trinidad and Tobago and Jamaica. Their corresponding annual average exports were US$30.1 million, US$25 million and US$13 million, respectively. Barbados sold a meagre US$0.3 million annually during the period under review.

In the OECS group of countries, only few countries exported to MERCOSUR. Antigua and Barbuda had the highest exports to the integration group, averaging over US$4.8 million annually over the 1990-97 period. Grenada’s exports to the trading bloc averaged a meagre US$0.3 million yearly during the 1990s.
In terms of direction of trade, there has been a noticeable shift in the relative shares of individual countries’ exports in total CDCC exports to MERCOSUR. The share of the CARICOM countries declined steadily from 56.3 per cent in 1990 to barely 27.1 per cent in 1997, while that of the non-CARICOM countries rose from 43.7 per cent in 1990 to 72.9 per cent in 1997.

Since the CDCC countries trade more with the United States and the European Union, the share of exports to Brazil as percentage of individual country total exports remains small. It ranges from an average low of 0.1 per cent for Barbados to a high 9.4 per cent for Jamaica.

In line with the trends in exports, CDCC countries’ imports from MERCOSUR grew steadily from US$444.8 million in 1990 to US$566.6 million in 1996, and then dropped by 18.4 percentage points to US$462.1 million 1997. The decline in imports in 1997 was reflected in virtually all the countries, but more disproportionately in the imports of the CARICOM countries, which declined by US$105 million compared to US$75 million for the non-CARICOM countries. The contraction in imports in 1997 was more pronounced in the Bahamas and the Dominican Republic, where imports declined by US$18.3 million and US$58 million, respectively.

The average yearly imports were US$18 million for the Bahamas, US$39 million for Jamaica, US$57 million for Trinidad and Tobago and US$6.6 million for Guyana. The yearly average imports of OECS countries from MERCOSUR hovered at around US$14.7 million during the period under review. The largest importers within this group were St. Kitts and Nevis, which bought an average US$4.3 million, and Saint Vincent and the Grenadines with US$3.4 million worth of goods from the trading bloc.

The non-CARICOM CDCC countries’ value of merchandise imports averaged US$315 million, which was slightly over two thirds of CDCC total imports from the integration group. The Netherlands Antilles had the highest dollar value of imports averaging US$121 million, while Haiti had the lowest at US$5.5 million during the period under review.

CDCC countries’ trade deficit with MERCOSUR was very small compared to that with NAFTA, largely reflecting the low share of CDCC trade to MERCOSUR as a percentage of total trade. CDCC’s trade with MERCOSUR countries has been unfavourable to the former group of countries. Virtually all the CDCC countries, with the exception of Belize and Aruba (to a lesser extent), have trade deficits with the trade bloc. Aggregate nominal value of CDCC trade deficits stood at US$341.3 million in 1990 and then deteriorated further to US$357.3 million in 1997. This deterioration was disproportionately reflected in the non-CARICOM countries, which recorded an average trade deficit of US$207 million, considerably higher than the US$73 million for the CARICOM countries.
Table VI
CDCC imports from MERCOSUR
(US$'000)

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Source: IBD Website (http://www.iadb.com)

In the non-CARICOM CDCC countries, the trade deficit deteriorated considerably in the Dominican Republic from US$28.2 million in 1990 to US$66.4 million in 1997, with the yearly trade deficit averaging US$82.3 million during the period under review. The trade deficit averaged US$47 million for the Netherlands Antilles and US$5.4 million for Haiti. Aruba recorded a slight deficit in the first two years, 1990 and 1991, and then experienced improvements in its trade balance.

In the CARICOM subgroup, the average annual trade deficit was US$32.5 million, and US$26.2 million, for Trinidad and Tobago and Jamaica, respectively. Belize’s trade balance yielded persistent surpluses throughout the 1990s, with an average trade surplus of US$1 million annually. The OECS countries’ trade deficits increased from US$11.6 million in 1990 to US$18.7 million in 1994. In 1995 and 1996, however, the trade balance improved considerably to a surplus of US$10.6 million and US$5.0 million, respectively (see Annex 9).
4. CDCC trade with Chile

CDCC exports to Chile, which amounted to US$7.7 million in 1991, experienced a huge increase in 1995 and reached US$276.4 million, and then slowed down to US$57.2 million in 1997. The huge increase in exports to Chile in 1995 mainly reflected an increase in a number of countries exporting to Chile, which reached six compared to only one country (Trinidad and Tobago) in 1991. CDCC exports to Chile are less than those to the United States and Brazil. Aggregate CDCC export to Chile averaged US$77 million over the period 1991-97. The non-CARICOM CDCC countries were the dominant penetrators of the Chilean market, accounting for 83.4 per cent of CDCC total exports, with the CARICOM countries accounting for the remaining 16.6 per cent.

The average value of non-CARICOM exports hovered around US$64.5 million during the period under review. Within this group, exports to Chile originated from only three countries: the Netherlands Antilles, the Dominican Republic and Haiti. The Netherlands Antilles’ exports to Chile constituted 45 per cent of CDCC's total exports.

CARICOM countries’ exports to Chile were largely accounted for by Trinidad and Tobago. Its annual average export of US$11.3 million constituted 89 per cent of total CARICOM exports, but a mere 14.6 per cent of CDCC total exports.

Table VII
CDCC exports to Chile (US$'000)

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<td>200</td>
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</table>

Source: IDB Trade Database
Among the OECS countries, only Dominica and Antigua and Barbuda exported goods to Chile. Their combined exports to Chile averaged US$1.2 million over the period 1991-97.

On the import side, CDCC countries’ merchandise imports from Chile averaged US$35.8 million. The non-CARICOM CDCC countries imported an average US$33.6 million worth of goods, which constituted 93.9 per cent of CDCC total imports. The imports of the non-CARICOM countries were dominated by Haiti and the Dominican Republic. Haiti imported an average US$21.3 million worth of goods from Chile and, therefore, accounted for the giant share (59.5 per cent) of CDCC imports. The Dominican Republic’s imports averaged US$12.3 million or one third of CDCC total imports (see Table VIII).

<table>
<thead>
<tr>
<th>CDCC imports from Chile (US'$000)</th>
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<tr>
<td>CDCC</td>
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<td>St. Vincent/Grenad.</td>
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<td>Dominican Republic</td>
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<td>Haiti</td>
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</tbody>
</table>

Source: IDB Trade Database

Underscoring their weak trade linkages with Chile, imports of CARICOM countries from Chile averaged US$2.2 million annually, which was 6.1 per cent of CDCC total imports. Jamaica’s imports averaged US$1.1 million, slightly above Trinidad and Tobago’s average of
US$0.7 million. OECS countries imported US$0.2 million worth of goods from Chile and their imports were dominated by Saint Lucia whose yearly imports averaged US$0.15 million.

CDCC countries’ overall trade balance recorded an average surplus of US$41.5. The non-CARICOM countries recorded trade deficits of US$8 million in 1991 and US$11 million in 1992. Thereafter, there was a marked improvement in the merchandise trade balance as the trade deficits gave way to sizeable surpluses. The Dominican Republic recorded an average surplus of US$17.6 million, while Haiti’s trade balance registered an average deficit of US$21.2 million.

The trade balance of CARICOM countries averaged a surplus of US$10.6 million. Jamaica and Barbados recorded persistent trade deficits throughout the 1990s. The average trade deficit was US$0.9 million for Jamaica and US$0.07 million for Barbados. However, the trade deficits recorded by these two countries were more than offset by the relatively huge surplus on Trinidad and Tobago’s merchandise trade balance. For the OECS countries, the average annual trade deficits amounted to US$1 million for the period 1991-97.

5. CDCC trade with NAFTA

Trade of CDCC countries was heavily concentrated on NAFTA and particularly the United States, which remained by far the dominant trading partner for the CDCC countries. CDCC exports to NAFTA, which were dominated by the CARICOM countries, declined to a low US$3,162.6 million in 1993 from US$3,921 million in 1990, posting a percentage decline of 19.3 per cent. These exports then rebounded significantly to register an increase of 22.2 per cent in 1997 (see Table IX). The average annual growth rate was, however, a meagre 0.3 per cent during the period under review.

CDCC countries’ exports to NAFTA averaged US$3,652 million annually during the period under review. The CARICOM countries have accounted for the bulk of CDCC exports to the trade bloc, with their exports averaging US$2,375 million. This represented almost two thirds of CDCC total trade. The exports of the CARICOM subgroup was dominated by the four More Developed Countries (MDCs)\(^4\), particularly Trinidad and Tobago and Jamaica, whose merchandise exports averaged US$1,028.8 million and US$559.5 million, respectively, for the period 1990-97. The non-CARICOM countries sold an average of US$1,285.8 million worth of goods to NAFTA. The huge decline in CDCC exports to NAFTA in 1993 was mainly reflected in Trinidad and Tobago’s exports, which lost nearly one third of their 1990 dollar value. Consequently, as total exports declined, the share of Trinidad and Tobago exports to NAFTA in total exports declined from 50.3 per cent in 1991 to 46.3 per cent in 1993. This decline was attributed to a decline in the prices of crude petroleum. The decline in exports was disproportionately reflected in exports to the United States of America which dropped by 35.8 per cent while exports to Canada grew by 16.1 per cent (see Annexes 6 and 11).

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\(^4\) The More Developed Countries comprise of Barbados, Guyana, Jamaica and Trinidad and Tobago.
The exports of the OECS group of countries declined from US$61.0 million in 1990 to US$49.3 million in 1996 and then dropped significantly to US$11.4 million in 1997. The two largest exporters in the OECS, Saint Lucia and St. Kitts and Nevis exported an average of U$21.9 million and US$8.4 million worth of goods, respectively. Surprisingly, the exports of Montserrat to NAFTA picked up considerably from a mere US$0.13 million in 1990 to US$23.3 million in 1996 as the country was experiencing a series of negative supply shocks caused by volcanic eruptions. In 1996 alone, Montserrat accounted for 47.2 per cent of OECS exports to NAFTA. The average export was US$3.4 million during the 1990s. Belize’s exports to the integration group recorded a yearly average of US$81.4 million.
Merchandise exports of the non-CARICOM countries, which amounted to US$1,476 million in 1990, contracted considerably to US$814 million in 1994. The decline, however, was short-lived as exports rebounded significantly to reach a level of US$1,462 million in 1997. Within the non-CARICOM group, the largest exporters, Dominican Republic and the Netherlands Antilles, accounted for a combined 71 per cent of non-CARICOM total exports to NAFTA. Interestingly, the two smaller exporters, Cuba and Haiti, recorded the strongest growth rates in merchandise exports to the trading group. The annual growth rate in exports averaged 13.0 per cent and 16.8 per cent for Cuba and Haiti.

In terms of direction of trade, no noticeable change has taken place as the United States of America continued to maintain its role as the dominant trading partner within NAFTA. Roughly 46 per cent and 46.7 per cent of Jamaica and Trinidad and Tobago’s total exports go to the United States market. The share of the OECS countries’ exports to the United States in total exports is relatively lower, owing to their heavy concentration in bananas, which is mainly exported to the European Union where it enjoys preferential access. The trade of non-CARICOM CDCC countries, with the exception of Cuba, was also concentrated on the United States market. Cuba’s exports to the United States remains very negligible largely due to the economic sanctions that the this country imposes on Cuba.

On the import side, the annual growth rate of CDCC imports from NAFTA grew faster than that of exports, averaging 7.4 per cent compared to a meagre 0.3 per cent for exports. The annual growth rate was 6.3 per cent, 5.1 per cent, and 10.6 per cent for the non-OECS CARICOM, OECS and non-CARICOM CDCC, respectively. The total imports of the CDCC countries, which stood at US$6,081 million in 1990 increased to US$9,672 million in 1997. Similar to its exports, CDCC imports from NAFTA was dominated by the CARICOM countries which accounted for an average 60.4 per cent of the total, with the non-CARICOM countries taking 40.6 per cent.

Trinidad and Tobago’s imports rose from US$578 million in 1990 to US$1,700.4 million in 1997 (see Table X). Imports of Jamaica and Bahamas from NAFTA averaged US$1,357.9 millions and US$852.5 million.

OECS countries’ imports increased progressively from US$300.8 million in 1990 to US$410.6 million in 1997. This represented an increase of 36.5 per cent during the period under review. The increase in OECS imports was largely reflected in the imports of Dominica and Grenada, which recorded yearly average growth rates of 7.5 per cent 10.5 per cent, considerably above the average for the OECS region as a whole. On the other hand, the annual average growth was a negative 14.2 per cent for Saint Vincent and the Grenadines. OECS imports from NAFTA as a percentage of CDCC total imports declined slightly from 4.9 per cent in 1990 to 4.2 per cent in 1997, while that of non-OECS CARICOM declined from 54.8 per cent to 52.8 per cent.
Table X
CDCC imports from NAFTA
(US$'000)

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<tr>
<td>Haiti</td>
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<tr>
<td>Netherlands Antilles</td>
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Source: CARICOM Secretariat, and IMF; Direction of Trade Statistics

Belize’s imports from NAFTA increased steadily from US$140.9 million in 1990 to a high US$191.5 million in 1993 and then slowed to US$120 million in 1997. Most of Belize’s imports came from the United States and Mexico, with the former accounting for more than 81 per cent of the country’s total imports from the integration group, while the latter accounted for the remainder.5

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5 Over the years Mexico has consolidated its position as the second largest trading partner for Belize after the United States within the trade bloc with the share of Belize’s trade with Mexico as percentage of total trade with NAFTA consistently outpacing that of its trade with Canada.
Imports of non-CARICOM CDCC countries exhibited patterns similar to that of exports. Imports first declined from US$2,450 million in 1990 to US$1,987 million in 1994 and then increased considerably to US$4,157 million in 1997. This decline was largely reflected in Netherlands Antilles’ imports whose annual growth rate was a negative 42.6 per cent in 1994. Haiti’s imports from NAFTA averaged US$435.0 million during the period under review.

In terms of direction of trade, most of the CDCC’s imports were sourced from the United States of America which accounted for an average of more than 85 per cent, 87.5 per cent and 88 per cent of the imports of Barbados, Jamaica and Trinidad and Tobago. The remaining 15 per cent, 13.5 per cent and 12 per cent was sourced predominantly from Canada. Cuba’s imports are also sourced predominantly from Canada.

The faster growth in merchandise imports relative to exports resulted in chronic trade deficits with NAFTA in all the CDCC countries, with the exception of Trinidad and Tobago and Guyana. The aggregate trade balance deficits for the CDCC countries which stood at US$2,159.8 million in 1990 increased progressively and reached a high of US$5,913.6 million in 1997 (See Annex 10). This marked deterioration in trade balance deficits was reflected in virtually all the countries but was more pronounced in the CARICOM countries. The trade balance deficits of CARICOM countries increased from US$1,186 million in 1990 to US$3,219 million in 1997. The trade deficit averaged US$2,110 million for the CARICOM group. Not surprisingly, this constituted 58.9 per cent of CDCC trade deficits. While Jamaica, Barbados, and Bahamas recorded trade deficits averaging US$798 million, US$509 million, US$533 million, respectively, Guyana’s trade balance recorded an average surplus of US$37.8 million. Trinidad and Tobago’s trade balance yielded persistent surpluses for the first seven years (1990-96). However, the healthy trade balance surplus deteriorated significantly in 1997 and turned into a deficit US$662 million, as merchandise exports shrunk by nearly 10 per cent probably on account of depressed oil prices.6

The OECS countries recorded an average trade deficit of US$281 million. This was disproportionately reflected in high deficits for Saint Lucia and St. Kitts and Nevis of US$98 million and US$48 million, respectively. Trade balance deficits of Saint Vincent and the Grenadines averaged US$44.6 million. The largest trade balance deficit was recorded in 1997 and was largely reflected in the banana exporting countries of Dominica, Saint Lucia and Saint Vincent and the Grenadines.

The non-CARICOM CDCC countries recorded an average deficit of US$1,470 million. The average deficit was US$927 million for Dominican Republic and US$279 million for Haiti. Cuba’s trade deficit averaged a modest US$84.1 million over the period 1990-97.

The composition of trade by Standard International Trade Classification (SITC) clearly reveals that the composition of CARICOM exports to NAFTA has not changed significantly in the 1990s.7 On the export side, CARICOM trade with NAFTA is still dominated by mineral fuels, lubricants and related materials. In 1990, roughly 53 per cent of exports to NAFTA was in this group of products (see Table XI). By 1996, the share of mineral fuels, lubricants in total CARICOM exports to NAFTA declined to 32.1 per cent. Crude materials, inedible, except fuels,

6 According to UNCTAD’s Trade and Development Report, oil prices declined by 6 percentage points in 1997.

7 The lack of data on SITC breakdown for all the CDCC countries limited the analysis to CARICOM countries only.
which was the second biggest product group accounting for 18 per cent of CARICOM exports with NAFTA, has been relegated to third biggest after miscellaneous manufactured articles with 15 per cent of CARICOM exports to NAFTA in 1996. On the import side, the composition of CARICOM imports from NAFTA has not changed at all in 1996 as machinery and transport equipment account for 30 per cent of imports, up from 26.3 per cent in 1990. The share of manufactured goods classified chiefly by materials declined slightly from 18.3 per cent in 1990 to 16.3 per cent in 1996, while that of miscellaneous and manufactured articles rose to 16.6 per cent, up from 12.1 per cent in 1990.

Table XI
Percentage distribution of CARICOM trade with NAFTA by SITC section

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<tbody>
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<td>0. Food and live animals chiefly for food</td>
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<td>6.6</td>
<td>15.3</td>
<td>15.0</td>
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<td>1. Beverages and tobacco</td>
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<td>17.8</td>
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<td>3. Minerals, fuels, lubricants and related materials</td>
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<td>4. Animals and vegetable Oils, fats and waxes</td>
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<td>6. Manufactured goods classified chiefly by materials</td>
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<td>26.3</td>
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<td>7. Machinery and transport, equipment</td>
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Source: CARICOM Secretariat

6. CDCC trade with the European Union (EU)

CDCC exports to the European Union (EU) averaged US$1,817.9 million for the period 1990-1998 (see Table XII). Over the nine years, exports to the EU recorded moderate growth of 4.7 per cent per year. Among the CDCC subgroupings, CARICOM exports, which represented 86 per cent of the total for the CDCC countries, averaged US$1,555.4 million. CARICOM exports grew by 4.5 per cent per annum. Exports of CARICOM countries were accounted for largely by the exports of the larger non-OECS countries. These countries’ exports made up 74 per cent of the total of CDCC countries to the EU and roughly 87 per cent of the total for CARICOM to this region. Average yearly growth in non-OECS CARICOM exports, at 5.5 per cent, was slightly above that for CARICOM as a whole. Among the non-OECS CARICOM countries, Jamaica and the Bahamas with 17 per cent each of the exports of the CDCC, (and respective averages of US$317,552.1 million and US$308,334.3 million), were the most significant. Meanwhile, exports of Trinidad and Tobago, 13 per cent, and Suriname and Guyana, 10 per cent, respectively, were also relatively important. Exports of Trinidad and Tobago posted strong average annual growth of 30 per cent. Meanwhile, exports of Belize and Jamaica grew by 14.0 per cent and 7.5 per cent, per year.
OECS countries’ exports (an average of US$208.0 million) to the EU accounted for 11 per cent of the total for the CDCC region. OECS exports declined on average by 1.3 per cent per year over the nine years, moving from US$254.7 million in 1990 to US$190.1 million in 1998. This was cause for some concern, since it suggests that despite the preferential Lomé Agreement, OECS exports to the EU market remain below expectations. This is probably indicative of low productivity, capacity constraints and weak competitiveness of OECS producers.

Saint Vincent and the Grenadines and Saint Lucia, which enjoy preferential prices for their bananas were the most significant OECS exporters to the EU, with 4 per cent and 3 per cent of the CDCC’s total to this bloc. Exports of Saint Vincent and the Grenadines had an average growth of 8.2 per cent per year. In contrast, exports of Saint Lucia declined by 3.7 per cent per year, slipping from US$80.6 million in 1990 to US$48.3 million in 1998. Among the other OECS countries, Dominica accounted for 2 per cent of the CDCC total, while both Antigua and Barbuda and St. Kitts and Nevis accounted for 1 per cent each.

Within the non-CARICOM CDCC group of countries, trade flows to the EU were recorded for the Dominican Republic and Haiti only. Exports from these two countries grew by 7.6 per cent per year for the period. Average exports of the Dominican Republic comprised 13 per cent of the CDCC total, while exports of Haiti made up 2 per cent of the total. Exports of the Dominican Republic, which averaged US$229.3 million, grew by 9.6 per cent per year, from US$149.2 million in 1990 to US$282.5 million in 1998. In contrast, exports of Haiti, which averaged US$33.2 million for the nine years, grew slightly by 0.5 per cent per year. Industrial and agricultural production in Haiti has slowed considerably due to the political instability that has impacted negatively on business confidence, local and foreign direct investment, provision of infrastructure, especially power and productive capacity.

Similar to their exports, CDCC imports from the EU are strongly influenced by the established patterns of comparative advantage and disadvantage and by historical linkages. As a consequence, CDCC exports to the EU are made up mainly of primary products, while their imports tend to be concentrated in manufactured goods.
### Table XII
Value of CDCC Exports to the European Union (EU) (US$000)

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Source: European Union (EU) Database and CARICOM Trade Statistics ... n/a
CDCC imports from the EU averaged US$2,059.1 million over the nine years under study. Total CDCC imports registered average yearly growth of 9.9 per cent, increasing from US$1,505.0 million in 1990 to US$2,957.6 million in 1998. Imports to the CARICOM subregion which averaged US$1,529.1 million, posted growth of 9.5 per cent per annum, moving from US$1,150.5 million in 1990 to US$2,117.6 million in 1998. On average, CARICOM imports comprised 74 per cent of the total for the CDCC countries. Within CARICOM, the non-OECS countries registered vibrant growth in imports from US$915.9 million in 1990 to US$1,699.0 million in 1998. Imports for these countries averaged 60 per cent of the total for the CDCC. As is expected, performance within this subgroup varied depending on production structures, productivity and the established orientation of trade. Trinidad and Tobago, the Bahamas and Jamaica dominated the import shares with 15 per cent, 14 per cent and 14 per cent of the CDCC’s total, respectively. Trinidad and Tobago’s imports from the EU expanded by 16.3 per cent per year, from US$172.6 million in 1990 to US$446.2 million in 1998. Imports of the Bahamas increased from US$144.7 million in 1990 to US$359.8 million in 1998. At the same time, Jamaica’s imports shifted upwards from US$273.4 million in 1990 to US$424.9 million in 1998.

OECS imports from the EU represented 14 per cent of the total for the CDCC. Imports of Antigua and Barbuda, which averaged 5 per cent of the total for the CDCC, posted strong yearly growth of 22.5 per cent, increasing from US$54.1 million in 1990 to US$188.6 million in 1998. Imports of Saint Vincent and the Grenadines, which made up 3 per cent of the CDCC total and averaged US$61.9 million over the period, grew by 17.6 per cent per year. Meanwhile imports to St. Kitts and Nevis and Grenada grew by 7.3 per cent and 5.2 per cent per year, respectively. On the other hand, imports to Saint Lucia, which represented 3 per cent of the total for the CDCC declined by 1.5 per cent per year. Among the non-CARICOM CDCC countries, imports of the Dominican Republic expanded by 13.3 per cent per year, growing to US$728.7 million in 1998, from US$354.4 million in 1990. Imports to the Dominican Republic averaged US$444.6 million over the period, 22 per cent of the CDCC’s total. Haiti’s imports, on the other hand, were comparatively much smaller, averaging US$85.4 million per year, and accounting for only 4 per cent of the CDCC’s total. Haiti’s import capacity has been adversely affected by its inability to sustain vibrant growth and its weak foreign exchange position.

7. CDCC trade balance with the European Union

In spite of the preferential Lomé Agreement that governs much of CDCC’s trade with the EU, these countries had an average trade deficit of US$24.1 million with the EU. The CDCC’s average trade deficit contracted by 60.7 per cent per year over the nine years under review. Despite the yearly fluctuations between surplus and deficits, CARICOM’s balance of trade averaged a surplus of US$26.3 million between 1990 and 1998. This seems to suggest that unlike the position for the CDCC as a whole, CARICOM countries benefited from the preferential Lomé Agreement. Among the non-OECS CARICOM countries, Guyana recorded an average trade surplus of US$104.0 million, while for Suriname, the surplus was US$51.4 million. Belize, Jamaica and the Bahamas also registered average surpluses of US$36.2 million, US$34.4 million and US$24.6 million, respectively.
Table XIII
Value of CARICOM imports to the European Union (EU) (US$'000)

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Source: European Union Trade Database and CARICOM TRADE Statistics

The OECS countries recorded an average trade deficit of US$86.3 million, 36 per cent of the average deficit for the CDCC as a whole. The trade position of the OECS countries deteriorated from a surplus of US$20.1 million in 1990 to a deficit of US$22.8 million in 1998. Saint Vincent and the Grenadines and Dominica returned average trade surpluses of US$10.0 million and US$7.7 million, but the other countries recorded trade deficits. Antigua and Barbuda had an average trade deficit of US$81.5 million, Grenada US$13.1 million and St. Kitts and Nevis and Saint Lucia US$8.1 million and US$1.3 million, respectively.

The trade deficit of Haiti and the Dominican Republic averaged US$267.5 million. The deficit for the two countries grew by 13.0 per cent per year, shifting from US$160.6 million in 1990 to US$524.5 million in 1998. The Dominican Republic's trade deficit, which averaged US$215.2 million, expanded by 16.7 per cent per annum to reach US$446.1 million in 1998. Haiti’s deficit was much more moderate at US$52.3 million, and also grew at a slower 10.9 percentage per year to amount to US$78.3 million in 1998.
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**Non-CARICOM CDCC**

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| Cuba | 0.00       | 0.00       | 0.00       | 0.00       | 0.00       | 0.00       | 0.00       | 0.00       | 0.00       | 0.00          |
| Haiti | -34439.74  | -26964.75  | -32434.26  | -44729.11  | -40342.27  | -80007.32  | -58154.28  | -74996.90  | -78335.04  | -52267.08     |

Source: CARICOM Secretariat and IDB
CONCLUSION

The composition of CDCC trade is determined by its production structure, while the direction of trade is influenced by preferential trading arrangements and historical links.

Despite repeated attempts to diversify their economies both in terms of products and markets, CDCC exports remain heavily concentrated on a narrow range of relatively low value added primary products and manufactured goods, which are principally exported to North America and the European Union. NAFTA and (particularly the United States and Canada) is the largest trading bloc for the Caribbean countries, with the United States accounting more than two thirds of CDCC exports and providing half of their imports.

CDCC trade with NAFTA is dominated by the non-OECS CARICOM countries, and particularly the four MDCs. These countries accounted for slightly less than two thirds of trade with NAFTA; with the OECS and non-CARICOM accounting for 2 per cent and 34 per cent, respectively.

In terms of CDCC evolution of trade during the 1990s, there has been a marked slowdown in CDCC export expansion to NAFTA. The contraction was more pronounced in the OECS, which registered an annual growth rate averaging negative 8.7 per cent compared to 2.8 per cent and 0.6 per cent for the non-CARICOM CDCC and the non-OECS CARICOM, respectively. All in all, the rate of growth in imports consistently outpaced that of exports, thus resulting in trade balance disequilibria in almost all the CDCC countries.

CDCC trade with MERCOSUR is dominated by the non-CARICOM CDCC countries (notably Aruba, Netherlands Antilles and the Dominican Republic) which in 1997 accounted for almost three quarters of total exports. Brazil remains the largest trading partner of the CDCC countries accounting for more than 98 per cent of total exports.

CDCC’s trade with the EU expanded over the period under review. Exports grew on average by 4.7 per cent per year. Non-CARICOM exports grew by 7.6 per cent on average, while CARICOM countries registered growth of 5.5 per cent. Imports from the EU increased by 9.9 per cent on average. Non-CARICOM imports grew by 11.7 per cent per year and averaged US$530.0 million per annum. Meanwhile, imports of CARICOM increased by 9.5 per cent, with an average growth of 10.3 per cent for the non-OECS subregion and 8.9 per cent for the OECS. Moreover, in spite of the system of preferences offered to OECS countries under the Lomé Agreement, these countries still had a trade deficit of US$24.1 million. This might suggest that preferences do not lead to competitive exports.

Although small compared with exports to the other major blocs, CDCC exports to the Andean Community registered vibrant average growth of 46.1 per cent over the period. These exports averaged US$159.5 million. The three subgroups of the CDCC posted strong export growth, though largely from low bases, which meant that they have not achieved critical mass in this market. Imports from the Andean Community also recorded strong growth, thereby resulting in persistent trade deficits. Imports of the non-CARICOM countries grew robustly by 54 per cent per year, while those of the CARICOM countries also registered strong growth of 46 per cent.
The CACM is of lesser importance than the EU and NAFTA, with respect to trade flows. Trade with this region, like that with the Andean Community, has been growing steadily over time. Exports to the bloc expanded by 27.2 percent per year due to strong growth in both CARICOM and non-CARICOM exports. Imports, however, posted more moderate growth to leave the CDCC countries with trade surpluses with this bloc.

Generally, the composition and orientation of CDCC trade has remained relatively stable over the decade of the 1980s and 1990s. Exports remain concentrated in primarily agricultural and mineral products and low value added labour-intensive manufacturing. CDCC countries need to make better use of policies and strategies to diversify their production systems and to produce higher value added products for a wider range of markets. This should reduce their vulnerability to commodity price shocks and result in a more stable trajectory of growth.
STATISTICAL ANNEX
## Annex 1

Value of CARICOM Balance of Trade with the Andean Community 1990-1997 (US$'000)

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Source: IDB Database and CARICOM Trade Statistics
### Annex 2

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Source: IDB
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Source: IDB
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Source: IDB
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Belize
-804.00 -383.00 -15549.00 -20400.00 -3675.00 -11000.00
Guyana
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Jamaica
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Suriname
3675.00 3910.00 -1300.00 -3100.00 -11900.00 -8690.00 -700.00
Trinidad & Tobago
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OECS
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Dominica
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Grenada
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Montserrat
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St. Kitts and Nevis
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St. Lucia
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St. Vincent/ Gren.
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Dominican Republic
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Source: IDB Database and CARICOM Trade Statistics
### Annex 6

**CDCC exports to Canada (US$'000)**

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Source: CARICOM Secretariat and IDB
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Source: CARICOM Secretariat
Annex 11

CDCC exports to the United States of America (US$'000)

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Source: CARICOM Secretariat and IDB
## Annex 12

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Source: CARICOM Secretariat and IDB