



**REVIEW OF THE MARKETING BOARDS
IN THE OECS**

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LIST OF ACRONYMS AND DEFINITIONS

ADCU	Agricultural Diversification and Coordinating Unit
AID Bank	Agricultural Industrial Development Bank
ARCDP	Agricultural Rehabilitation and Crop Diversification Project
BWI	British West Indies Airlines
CARICOM	Caribbean Common Market
CATCO	Caribbean Agricultural Trading Company
CDB	Caribbean Development Bank
CEMACO	Central Marketing Corporation of St. Kitts
CIDA	Canadian International Development Agency
CIF	Cost Insurance and Freight
CMC	Central Marketing Corporation of Antigua and Barbuda
CML	Copra Manufacturers Limited of St. Lucia
DBMC	Dominica Banana Marketing Corporation
DEXIA	Dominica Export and Import Agency
EC\$	Eastern Caribbean Dollars
ECA	Eastern Caribbean Agencies
ECGC	Eastern Caribbean Group of Companies
ECSEDA	Eastern Caribbean States Export Development Agency
EEC	European Economic Community
FAO	Food and Agricultural Organization
FPEA	Fresh Produce Exporters Association
GCA	Grenada Cocoa Association
GDB	Grenada Development Bank
GDP	Gross Domestic Product

GNCA	Grenada Nutmeg Cooperative Association
IFAD	International Fund for Agricultural Development
LAAD	Latin American Agri-business Development Corporation
LIAT	Leeward Islands Air Transportation
MNIB	Marketing and National Importing Board of Grenada
MS&D	Market Support Service and Development (of DEXIA)
OAS	Organization of American States
OECS	Organization of Eastern Caribbean States
ORD	Organization for Rural Development
PFU	Producers Farmers Union
PROMIS	Production and Marketing Information Service
SDIL	Square Deal Investments Limited
SFAD	Small Farmers Agricultural Development
SLBGA	St. Lucia Banana Growers Association
SLCGA	St. Lucia Coconut Growers Association
SLMB	St. Lucia Marketing Board
SSMC	St. Kitts Sugar Manufacturing Corporation
SVMC	St. Vincent Marketing Corporation
TSBA	Traffickers Small Business Association
U.K.	United Kingdom
UNDP	United Nations Development Program
USAID	United States Agency for International Development
WINBAN	Windward Islands Banana Organization

EXECUTIVE SUMMARY OF FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

A. FINDINGS

1. Establishment of Marketing Boards as Mandated by Enabling Legislation

a. Powers

Marketing Boards were established in the Organization of Eastern Caribbean States (OECS) under the control and guidance of local governments, mainly through the Ministries of Agriculture. An exception is Dominica where the Dominica Export and Import Agency (DEXIA) is under the Ministry of Trade and Industry, and Grenada where the Marketing and National Importing Board is under the Ministry of Finance Trade and Planning. The Marketing Boards were granted the power to control all marketing activities – from regulating grades and prices of products they buy to being involved in commercial operations. There may be minor differences among the legislation, but in general, the Boards are granted the powers to:

- Buy and sell, as well as import and export products (the exception is DEXIA, which is entitled to commercially export only specified products, the rest are reported to be trial exports);
- Establish and operate facilities for preparing, processing, and packaging products (cold storage, washing, and packing houses);
- Regulate the grades and prices of the products to be bought by the Boards;
- Enter into contracts for the transport of produce;
- Collect, generate, and distribute market and other information relating to agriculture; and
- License agents to carry out commercial operations for the Marketing Board (such as, purchasing, selling, processing). In Antigua, the Marketing Board is entitled to issue licenses for any article or product approved by the Minister of Agriculture.

Legislation grants the corresponding minister the power to designate "specified products" among domestic production and/or essential (basic) commodities for imports, in order to grant its monopoly to the Marketing Boards. The monopoly on imports of basic commodities guarantees the Marketing Board's main income but precludes efficient economic operations.

b. Duties

The general responsibilities of Marketing Boards are stipulated by their enabling Acts. The wording may be different from one act to another but, in essence, responsibilities and powers are the same: Marketing Boards are established to promote exports of agricultural products that are not under the control of other Statutory Boards (for example, bananas under the

Dominica Banana Marketing Corporation [DBMC], cocoa under the Grenada Cocoa Association, and nutmeg under the Grenada Nutmeg Cooperative Association [GNCA]).

The Marketing Boards are also established to play an important role in food security by undertaking the import of essential commodities and specified products. The government has total control over imports of the above-mentioned products by designating them accordingly. These imports are then carried out through the Marketing Boards. This allows the government to adopt any pertinent policy; for example, a consumer-oriented policy exists by applying moderate to low markups in these import operations to maintain low selling prices. Only in St. Kitts, the Minister of Trade is involved directly in importing basic commodities for further wholesale distribution. These operations are conducted through the Ministry of Trade Supply Unit.

The farmer-oriented responsibility of Marketing Boards is to stimulate production of agricultural products by facilitating their marketing in the domestic or international markets. Marketing Boards are asked to play a relevant role in export promotion in favor of the production sector, but this role is not accomplished in any of the islands other than in Dominica where a few development activities are being undertaken.

c. Board of Directors

The board of directors of a Marketing Board is comprised of seven to nine members, all appointed by the government through the ministry that controls the Board. The chairman and deputy chairman are also appointed by the government, with the exception of St. Lucia where they are elected by the Board. The minister has the power to revoke any member. There is little to no representation of the production sector (farmers) or private importers/exporters on the Board, and the government official representation is generally the most predominant. The total control of the government over the board of directors of a Marketing Board does not allow the private sector (producers and traders) to openly question, intervene, or participate in Board deliberations.

2. Current Operations

Most Marketing Boards of the OECS are engaged primarily in commercial activities, in addition to their responsibilities of facilitating marketing. Marketing Boards determine the availability and/or deficit of different products for importing and exporting. Determinations are generally made in conjunction with the Agricultural Department of the Ministry of Agriculture and the Supply Unit of the Ministry of Trade. The products, volumes, and date of export and import activities are determined jointly.

a. Import Operations

Except for the Central Marketing Corporation of St. Kitts (CEMACO), all the Marketing Boards are involved in import operations, mostly of essential commodities (such as flour, rice, and sugar). The efficiency of this operation is criticized by the private sector, which argues that buying and shipping procedures utilized by Marketing Boards are not commercially appropriate.

The Marketing Boards in St. Kitts and St. Vincent are engaged exclusively in inefficient supermarket activities. They compete with similar supermarkets and stores in retailing all types of domestic and imported products. In St. Lucia, the St. Lucia Marketing Board (SLMB) competes directly (with its distributors) in the sales of fresh products to restaurants and hotels. The Marketing Boards in Antigua and Grenada use their retail outlets to compete with retailers of fresh products in city markets and supermarkets. In essence, they operate government-owned retail outlets in direct competition with the private sector.

b. Export Operations

The only Marketing Boards engaged in export activities are in St. Lucia and Grenada; in Dominica, DEXIA makes only trial exports. These activities seem to be inefficient and very low profiled as commercial operations (that is, low quality of the exported products, unreliable shipments, inadequate packing). This activity does not compete (to a great degree) with private exporters, but nonetheless it diverts efforts and means that could be used more efficiently to provide market-development services to the private sector (market information, market research and development, etc.).

c. Infrastructure

The infrastructure owned and maintained by Marketing Boards is entirely directed to their commercial activities. DEXIA is an exception as it uses its facilities (such as cold storage and packing units) to provide services to exporters at the Melville Airport. The Canadian International Development Agency (CIDA) contributed to the installation of DEXIA's facilities at the Melville Airport in Dominica. The other Marketing Boards receive little or no financial aid from international development institutions.

The Board-owned infrastructure consists mainly of warehouses, cold storage, and transport vehicles (trucks and vans). The Marketing Boards in St. Kitts and in St. Vincent own a complete supermarket infrastructure, and the ones in Grenada, Antigua, and St. Lucia have retail outlets for fresh products.

Most of the above-mentioned infrastructure and equipment are in poor condition and limit Marketing Board operations. The lack of economical efficiency in their operations is probably the main contributor to this.

d. Finance

In most cases, financial information was not made available to the consultant precluding a detailed analysis. The financial situation for most Marketing Boards seems to be negative, a situation created mainly by inefficient retail and export operations as well as by necessary overhead costs. A clear example of this is the St. Vincent Marketing Corporation (SVMC) where incomes generated from imports of essential commodities and a few specified products are the Marketing Boards' main sources of income; low-to-moderate rates applied to these commodities exacerbate their low economic performance.

B. CONCLUSIONS

1. Imported products generate the main income for Marketing Boards. However, retail sales operations are very inefficient in those countries where they are operated by Marketing Boards. These commercial activities of importing for wholesale and retail could be transferred from Marketing Boards to the private sector to improve economic efficiency, thus allowing the Boards to concentrate efforts on regulatory and market development activities.
2. With a minor exception in Dominica and St. Lucia, commercial operations conducted by Marketing Boards are economically inefficient. The "public funds" resulting from imports and resale of basic commodities are used to run other inefficient direct marketing operations, unfairly competing with private sector efforts. These funds could be better used to provide promotional and other services to the production and trade sectors.
3. Commercial activities of Marketing Boards detract from their responsibility of working to promote the interests of agricultural producers and traders.
4. The comparative advantage of nontraditional exportable products has to be clearly identified to determine if they can compete in the international market, keeping in mind the level of exports and costs of other producers (for example, tropical fruits from Latin America and/or Africa in the United Kingdom market). Diversification programs need to be market-led, so that farmers are not misled to increase nonmarketable products. The role of Marketing Boards has yet to be defined in this scenario. Careful attention has to be placed in order not to interfere with the private sector exporters.
5. Increasing domestic output of nontraditional crops will require new institutions as well as regional coordination for joint OECS marketing efforts. At present, none of the OECS countries have viable institutions to address market and production development activities for nontraditional crops. In Dominica, DEXIA has the legislative mandate to do so, but has yet to develop the capacity. In St. Lucia, the Fresh Produce Exporters Association (FPEA) would like to be involved with similar activities, but needs important institutional strengthening. OECS member countries look to the Agricultural Diversification and Coordinating Unit (ADCU) to provide solutions for addressing problems associated with introduction of commercially viable nontraditional export crops. The role of the Caribbean Agricultural Trading Company (CATCO) role should be clearly defined to determine the support activities required by each OECS member to better perform exports.
6. There is little or no interest by existing Marketing Board management to change current operations. With the exception of St. Lucia, none of the Marketing Boards envisions reorganization, thus they will continue with a legal framework that is too broad. This allows Boards to promulgate and enforce regulations that reinforce their own inefficient monopoly marketing activities. The fact that Marketing Boards are administered by different ministries in each country militates against easy development of common policies across OECS countries.
7. OECS member countries lack a clearly defined role for Marketing Boards to positively assist producers and traders. Farmers expect Boards to be totally in charge of marketing the domestic production of exportable nontraditional products, such as dasheens, eddoes, tannias,

sweet potatoes, and fruit trees. Private sector traders involved in exports would like to see Marketing Boards completely out of the export business.

8. Existing private sector exporters have valuable knowledge and experience, but are limited by the lack of effective marketing organizations through which they can operate. These private exporters should benefit from strengthened associative groups so that various services could be provided more economically.

C. RECOMMENDATIONS

1. A study of the reorganization of Marketing Boards is needed to create a legal framework providing more representatives from the private sector in the Boards. If the current legislation allows, governments should consider representation in the Boards from the producers and exporters. In this reorganization of Marketing Boards, the regulatory role will have to be separated from commercial activities.

2. A financial study of Marketing Boards is needed to ascertain the economic viability of commercial operations, their impact on the financial situation of each Board, the impact on prices of imported food, and the potential for improved efficiency under alternative private sector organization.

3. Further study is needed to identify ways in which Marketing Boards can best assist growers and exporters of nontraditional crops and to rationalize the role of the private sector in growing and marketing these crops.

4. Additional study is needed to assess the role of generalized regional marketing organizations such as CATCO and specialized marketing organizations such as the DBMC to handle marketing needs of producers of nontraditional export crops.

5. Studies are needed for each country to determine the economic viability and market demand for specific nontraditional crops, prior to launching promotional campaigns to encourage small-scale farmers to diversify.

REPORT OF FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

A. DUTIES AND POWERS OF THE MARKETING BOARDS

1. Findings

The ample powers and duties stipulated in different legislation do not establish priorities for specific action from the Boards. Most current operations undertaken by Marketing Boards are supported by their enabling Act. Four responsibilities are given to Marketing Boards:

- Regulatory;
- Importing (food security);
- Exporting; and
- Domestic distribution.

Current operations of the Boards, however, are primarily commercial, disregarding other functions stipulated in the Act.

Governments, through the controlling ministries, define the policies that Marketing Boards have to implement, and control the Boards by appointing most of their members, including the chairman and deputy chairman. The controlling minister can revoke the appointment of any member at any time. Farmers do not have official representation on the Boards except in the Marketing and National Importing Board (MNIB) in Grenada.

Marketing Boards have the power to nominate agents to carry out any of their commercial activities. By selecting appropriate agents, Boards maintain control of operations, even when such operations are not carried out directly by the Boards themselves.

Marketing Boards are granted regulatory powers that do not correspond with their commercial activities. In other words, Boards have the power to control and manipulate the market by regulating quality and price.

Marketing Boards are mandated by legislation to facilitate operations of producers, an important role that is mostly disregarded. Boards are granted the power to contract for transportation of products from producers; and establish and operate storage, grading, and packing facilities. The warehouses and packing facilities are operated in the interest of the Marketing Boards and/or their commercial operations and do not benefit the farmers.

All the countries visited during the review of Marketing Boards suffer from poor market information services. Market information is seldom published and when it is, the quality of information is poor, especially information on export markets. There is no proper management of market information received from overseas; it is not distributed to exporters in an appropriate

manner, and little information is made available to farmers. With few exceptions, marketing corporations are not doing anything to solve this problem. There is no adequate coordination in gathering market information and distributing it to farmers and exporters.

No buying contracts or selling commitments exist between farmers and Marketing Boards (except in St. Lucia). This lack hinders production planning and establishment of domestic and export markets.

Production in small-sized farms is mostly carried out inefficiently with poor agricultural techniques. Low access to loans and farmers' inputs contribute to this. (Only in Grenada, MNIB is allowing farmers to have access to small loans by operating with Grenada Development Bank [GDB], where loan payments are deducted).

No adequate infrastructure exists in production areas to provide farmers with appropriate marketing services, such as packing houses, and cold or shaded storage. Packaging material is not available to all farmers, mainly due to its high cost, leading farmers to use whatever carton boxes they can find, such as banana boxes turned inside out and used to pack other fruits like mangoes or plums.

Several efforts by other institutions in favor of the producing sector are duplicated; for instance, farmers' inputs are imported by different associations, when it would be more efficient to import larger volumes through only one organization. Another example of duplicated efforts is extension services being provided by different associations in addition to extension services being provided by the Ministries of Agriculture.

2. Conclusions

Commercial activities absorb all the efforts made by Marketing Boards. In spite of being enacted to work in favor of the producer, no services are provided that benefit primarily the farmers. Marketing Boards use too much of their own capacity in inefficient commercial operations, for instance, import to retail agricultural products and/or commodities.

The board of directors and managers are responsible for immediate Marketing Board activities, whereas policy direction responsibility remains with the controlling ministry, thus with the central government.

The quality of products sold to Marketing Boards is lower than that sold in other markets because farmers do not approach this market as a first marketing choice. Producers seek better selling options, and approach hotels and restaurants directly, and only approach the Marketing Boards as the last selling resource.

Marketing Boards are using public funds to accomplish inefficient commercial activities that compete with the private sector, instead of using those funds to provide services that benefit producers and/or exporters.

Due to the emphasis placed on commercial operations, Marketing Boards are becoming users of the available market information, disregarding its formal and timely distribution to producers and exporters (an exception is in Dominica where market information services will

soon be provided). Little importance is given by government officials to the market information received, while such information could be the key to boost exports.

Few incentives exist to make farmers quality conscious. The lack of infrastructure for postharvest management contributes to this. The difficulty in controlling quality of produce from a large number of producers precludes a significant improvement in quality, unless important measures are taken, such as building a minimum of infrastructure that provides farmers with key postharvest services and packaging materials. A very scattered production with poor marketing infrastructure leads to excessive handling in gathering the products. Products are kept under direct sunlight, reducing quality, waiting to be picked up by a purchaser, i.e., a huckster or an exporter.

To prevent duplication of efforts, better coordination from the government is needed to channel the different efforts, such as establishing or designating specific institutions to be in charge of specific activities, for instance, only one institution to be in charge of identifying products and markets, one to develop adequate agronomic techniques for the crops aimed for diversification, one to provide extension services, and one to support marketing activities.

B. CURRENT MARKETING ACTIVITIES AND RELATED POLICIES

1. Findings

Marketing Boards are authorized to import and export products. Import activities are usually carried out with essential commodities such as sugar, rice, milk, and flour. Cases exist, however, such as in St. Kitts and St. Vincent, where Marketing Boards import other commodities mainly to carry on their supermarket activities. Of the import and export responsibilities, the export responsibility is the least accomplished and least economically efficient of the two. Several negative export experiences caused Marketing Boards to lose money.

Roles to be accomplished by the Marketing Boards in trade activities are too broad and not prioritized, creating false expectations. On the one hand, farmers expect Marketing Boards to buy from them all products for export and the domestic market regardless of quality and quantity. On the other hand, private exporters cannot accept that the Marketing Boards spend public money inefficiently in export operations and by doing this compete with their activities.

The export markets affected by Marketing Board activities are mainly the traditional markets in the United Kingdom and Canada and some regional trade. Marketing Boards do not envision any specific measures to develop new export markets. The Boards have a clear interest in maintaining imports because they are the Board's main source of income, and also cover the costs of the other inefficient operations, including export operations.

No specific plans exist to develop markets for domestic products that at first glance have comparative advantages. Vegetables consumed the most at hotels and restaurants are the European varieties (tomatoes, lettuce, cabbage, and so forth) instead of local products such as

tannia, dasheen, and yams. Farmers are not getting any feedback from the Marketing Boards on market consumption or market patterns in order to better plan their production.

The agricultural sector of the OECS cannot compete with other sectors in terms of wages paid to hand-labor; for example, in most of the islands the construction sector pays a nonskilled worker approximately double what a worker is currently paid in the agricultural sector.

Government policies, aimed to increase production without taking adequate measures to facilitate its marketing, remain inconsistent. On the one hand, government incentives to the production sector include: solutions to land tenure problems, tax holidays, tax free importation of equipment, and long-term lease of productive land. On the other hand, little or nothing is done to secure marketing of the expected production. Marketing Boards have limited capacity to buy domestic production of agricultural products, which is limited by the small domestic market and its low volume exports.

No organizations exist to effectively manage the export business. Some small businesses make isolated efforts to develop export markets, without formal agents to look out for their interests. There is no government support for development of export operations, such as provision of working capital, distribution of market information, and provision of infrastructure for exports.

Marketing Board management is weak and lacks the technical capacity to accomplish successfully the many activities the government is aiming at through only one type of organization.

No supply contracts are established between OECS exporters and importers overseas. Most shipments are made upon availability; products are gathered and processed for export at the moment the importer requests the product. Transportation out of the islands strongly limits export operations.

No common standards exist for agricultural fresh products in the Caribbean Common Market (CARICOM). Bureaus of standards exist in most of the islands, but their activities are directed mainly at manufactured products. No control in exports standards of fresh agricultural products are practiced.

There are no agents overseas to look after the interests of the OECS exporters. Importers' complaint calls are handled in an informal manner, i.e., directly by the exporters via telephone or fax machines, and by friends or relatives living overseas.

Hucksters and private exporters are more successful than Marketing Boards at buying and gathering products from farmers for export. The applied payment system suits better the farmers' needs of cash money; this system consists mainly in cash payments at reception of products or a few days later.

2. Conclusions

Farmers are more comfortable providing produce for the small domestic market at high prices. This requires lower marketing efforts than competing in the export market where farmers would have to increase volumes of productivity to lower production costs. Farmers leave a heavy task to exporters in order to prepare products for exports. Exporters make great efforts in gathering, selecting, and grading products, and would gladly pass this responsibility to someone in the marketing chain who could do it more efficiently.

Most commercial activities carried out by the Marketing Boards are not economically efficient because there is no pressure from the government for this. Enabling Acts do not require that a minimum economic performance be accomplished by each commercial operation. This leads to a continuous subsidy from incomes generated from imports of basic commodities to the other commercial operations of the Boards.

Marketing Board personnel lack the capacity to successfully accomplish commercial operations. For instance, they lack the market knowledge necessary to identify the best moment to buy for importing. Even though Marketing Board personnel are not legally considered public employees, they work on a similar bureaucratic track. The philanthropic philosophy under which the Marketing Boards are set up explains somewhat the personnel's attitude.

High domestic prices hinder export activities. High production costs make it difficult to compete in the international market, mainly with fresh agricultural products that require large numbers of dedicated hand-labor. Production techniques for well-identified exportable products need to be developed to grant clear comparative advantages.

Ethnic markets overseas are not saturated, but could become highly competitive markets if transportation problems are resolved. OECS' exporting of tropical products is highly dependent on these markets. In other words, overseas consumption of tropical products is limited mainly to ethnic markets and nothing is being done to expand markets for these products.

Exports to the extra-regional and regional markets are seriously limited by the irregularity of air transportation availability. Volumes exported cannot be pre-established by an importer-exporter arrangement. This hinders any type of contract between exporters and farmers. Schooners traveling within the islands make regional trade less dependent on air transportation, contrary to the extra-regional market, where most of the fresh products have to be exported by air.

The quality of exports of fresh agricultural products from the OECS is affected by poor postharvest management and lack of infrastructure, but no control exists to maintain a certain quality level.

The lack of support to identify and give attention to exporters' interests has driven some to stop exporting fresh agricultural products. Exporters have had problems resolving complaints from importers, and in some cases losing money that forced them out of the export business.

Prompt cash payments are important when selling products for export. Farmers do not want to "chase" their buyers for delayed payments. Even though some hucksters pay after returning from carrying out their export activities, exporters, in general, still attract more farmers than the Marketing Boards with better prices.

C. SUPPORT TO INCREASE EXPORTS OF AGRICULTURAL PRODUCTS

1. Findings

The OECS islands have the same high production peak, mainly of domestic exportable products. No infrastructure (such as irrigation and/or greenhouses) exists at the production level to plan outputs according to market needs, exacerbating dependency on rainfall, resulting in the same production peaks in all the islands.

There is a general lack of knowledge at the producers' level on the operation of retail and exports of agricultural fresh products and all the different steps taken to accomplish these operations efficiently.

Governments have no specific plans to support export activities for agricultural products and little action is being undertaken by Marketing Boards to support export activity. However, DEXIA in Dominica is starting to program its activities to provide marketing services to private exporters. This is the only Marketing Board that is working, even though at an embryonic stage, in redressing the lack of support services for exporting. St. Lucia and Grenada operate for their own export interests, while the other OECS islands do not get involved in any action of the kind. Diversification at the production level involves too many products, but product marketing lacks specific actions to support exporters from the private sector.

There is a total absence of government participation and support for private sector exporters of agricultural products, and exporters are limited by their own capacity and efforts. No specific incentives are given to exporters of agricultural products to increase their operations. There appears to be a total lack of shipping planning for any agricultural products exported, thereby enhancing the space availability problem.

Air transportation costs are a significant factor in the cost structure of exporting agricultural products from the OECS. The unreliability of available space and the high cost of freight shipments make this service the most important to redress at a regional level, i.e., lobbying of the OECS representatives with all the servicing airlines.

No infrastructure exists at production areas or at airports to support the export of agricultural products.

2. Conclusions

Small domestic markets are quickly saturated with domestic production. Basically the same products are produced at the same time on the OECS's islands, i.e., fruits (mangoes, soursops, plums, and so forth), vegetables, and root crops, increasing regional competition for export to the

same markets overseas. Major efforts are required to develop more competitive markets, such as the United States, where the Latin American countries are very active.

Farmers hardly accept the price difference that exists between the price paid for agricultural products at the farm level and the price paid at the consumer's level. There is a lack of willingness or knowledge to understand all the costs involved in the distribution and marketing of these products. This is more evident when better quality products are required for exporting, thus requiring more work, although prices do not increase significantly.

Too many efforts are made individually by private nonorganized exporters, and no official support is being sought by them. The lack of an umbrella organization hinders any effort to lobby and build pressure at the government level.

Government officials do not take into consideration the valuable experience of the private exporters. Governments are not aware of the quality of products exported. Official actions should be directed to establish export standards, control them, and take actions to redress factors influencing quality such as packing, postharvesting, and transportation problems.

The banana industry has the most organized marketing activities among all the exported fruit industries in the OECS, but its infrastructure is underutilized. For instance, depots are used only a few days (in general only two days) a week; the rest of the time they could be used for packing and grading other exportable products.

3. Recommendations

A feasibility study on the reorganization of Marketing Boards should be considered, to separate the different activities carried out by the Boards, such as separating commercial from regulatory roles. More private exporter and producer representation is recommended for the Marketing Boards.

A financial study is needed to ascertain the economic viability of each commercial activity of the Boards, the impact of such activity on the financial situation of the Board, and the impact on prices. It is not evident that imports will be more efficient if left to the private sector, so the study should determine the potential for improved efficiency under alternative private sector organization. The risk of an important price increase will always be present if no control is exerted on the margins applied during the imports and distribution at the consumer level.

Based on the reorganization of Marketing Boards, another study will be necessary to identify the ways in which the Boards will provide services to producers and exporters. The personnel of the Marketing Boards will have to be trained to upgrade technical knowledge and management capacity. Producers should be trained continuously to make them aware of the quality required for exported products. There should be quality control of the products exported to maintain a positive image of the OECS's products.

A regional regulation on standards should be established mainly to control and regulate quality of exports of fresh products. A local institution will have to coordinate these regulations. This is a role similar to the one currently granted to Marketing Boards by legislation but not practiced. Careful attention will have to be paid not to duplicate this responsibility in two

institutions. This is an example of one of the ways in which Marketing Boards could assist growers and exporters.

A study on shipping practices is necessary to identify clearly the markets that are economically accessible, and identify improvements needed to solve the current problems of transportation. An approach at the highest government levels of the OECS is recommended. Air transportation will have to be organized, especially within the islands, to reduce costs and guarantee space availability. It appears to be less costly and less risky to ship to New York from Grenada than to ship to Antigua.

Studies are needed to identify regional products with clear comparative advantages as well as the overseas market opportunities. This needs to be determined prior to launching any production campaign. Market development will have to be made to compete in international markets without preferential treatments, in particular in Europe after 1992, when competition from Latin America and Africa is expected to increase.

A regional (OECS) program involving the tourist industry should be envisioned. The program should be aimed at increasing the use of typical regional agricultural products (such as soursop, tannia, dasheen, plantains) with local recipes to increase consumption of these products overseas, not depending only on ethnic markets.

TECHNICAL ANNEX A

ANTIGUA AND BARBUDA

CHEMONICS

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TECHNICAL ANNEX A
COUNTRY: ANTIGUA/BARBUDA

A. DESCRIPTION OF ISLAND AGRICULTURE

Antigua/Barbuda account for the largest surface in the British Leeward Islands, Antigua is the largest of the Islands with its 108 square miles. The agricultural sector in the Island is very small. The Loan Analysis for 1989 made by the AID Bank (Table A-1) shows that only about 1.9 percent of the loans have been directed to the agricultural production through 17 (seventeen) loans.

One main constraint for agricultural production in the island is water availability, the total rainfall per year averages around 40 inches. A tendency to lower averages has been experienced during the last years, as demonstrated for 1990 on Table A-2.

Sources indicate that less than 25 percent of the land with agriculture potential is cultivated, amounting to approximately 5,000 acres. According to a study made in 1984 (OAS) the land suitable for cultivation (with agricultural potential) is as follows:

	ANTIGUA		BARBUDA	
	acres	%	acres	%
with limitations	4,835	7.4	—	—
strong limitations	22,662	34.6	6,640	18.1
certain limitations	5,734	8.8	12,048	32.8
marginally suitable for cultivation	8,858	13.5	13,312	36.2
marginally suitable for pasture/forest	20,357	31.1	—	—
only for rough pasture	3,041	4.6	4,724	12.9
TOTAL	65,487	100%	36,724	100%

1. Area

The total area of both islands is 170.5 square miles, Redonda being insignificant within the State.

Antigua:	108	sq. miles	279.7	sq. km.
Barbuda:	62	sq. miles	160.6	sq. km.
Redonda:	0.5	sq. miles	1.3	sq. km.
TOTAL:	170.5	sq. miles	441.6	sq. km.

2. Population and percent in agriculture

The total population for Antigua/Barbuda, according to the 1988 estimates is of 78,726 inhabitants (a population census should be taken in 1991). There is no official information on the number of people involved in agricultural activities, but unofficial estimates from different sources indicate that a maximum of 10 percent of the labor force would be somewhat involved in agriculture, contrasting with at least a minimum of 40 percent involved in the services sector (mainly tourism activities).

3. Main agricultural production and exports

There is no official updated information on the total production per crop per year. Monthly estimates are made by the Production and Marketing Information Service (PROMIS) of the Ministry of Agriculture. The latest available statistical information on production is for the year 1988 (Table A-3), and the information on production levels (acres and produced volume) is for 1985 (Table A-4).

The 1990 agricultural trade balance for Antigua/Barbuda is largely negative, EC\$ 4,877,589 or 2,912,680 kg. resulting from 29 imported products against mainly 7 exported, as shown on the 1990 trade data (Table A-5). Total imports for the year amount to 3,089,124 kg., for a total value of EC\$ 5,109,690, while exports amount to 176,444 kg. for a total value of EC\$ 232,101.

B. ORGANIZATION AND STRUCTURE OF MARKETING BOARD

The government's statutory board in charge of agricultural marketing is the Central Marketing Corporation (CMC). CMC is currently involved in imports of fresh agricultural products to wholesale and retail them at their own facilities, where a retail outlet exists. Imports of basic commodities are also made by CMC, particularly imports of sugar and rice. Very low markups are indicated for these imports; approximately 10 percent on fresh products and 7 percent on basic commodities. CMC also purchases domestic production of

agricultural products, but farmers will approach CMC as a last selling resource, thus the volumes of purchases of domestic products are low.

CMC is importing farmer inputs, the Marketing Corporation operates as the commercial agent of the Ministry of Agriculture, in order to import and retail to farmers ag-chemicals that have been granted to the latter Ministry.

1. The name and number of enabling legislation setting up the board are:

"Central Marketing Corporation (Amendment) Act, 1976".

It can be cited as **Act No. 19 of 1976.**

This is an amendment to the Central Marketing Corporation Act No. 14 of 1973: **"An Act to provide for the establishment of a Corporation to be known as the Central Marketing Corporation, for the powers of the Corporation,..."**

2. CMC is now under the responsibility of the Ministry of Agriculture (was originally under the Ministry of Agriculture, then under the Ministry of Trade and Commerce, and at present back to the Ministry of Agriculture).
3. The Board of the Corporation is constituted by 7 (seven) members appointed by the different Ministers for a period of no more than 2 (two) years, with the option of reappointment. The Chairman and a deputy are also nominated by the Minister from among the above-mentioned members, the latter has the statutory power to give the policy direction to be accomplished by the Board.

"The Corporation shall consist of the following members:

- (a) An officer attached to the Ministry responsible for agriculture, nominated by the Minister;
- (b) an officer attached to the Ministry responsible for finance nominated by the Minister responsible for finance;
- (c) an officer attached to the Ministry responsible for health nominated by the Minister responsible for health;
- (d) one member nominated by the Minister responsible for Barbuda;
- (e) one member representative of farmers engaged in the cultivation of small agricultural farms or holdings selected by the Minister;
- (f) one member representative of the business community who shall be a wholesaler or retailer of produce; and
- (g) one other member."*

*Actually the non specified member is from the banking sector.

4. **The duties of the Corporation, as stipulated by the Act, are:**

- "(a) to stimulate, facilitate and improve the production, marketing and processing of produce in the State, particularly for the benefit of the producer;**
- (b) to develop and carry out a co-ordinate program with the view of securing the most favorable arrangements for the purchase, handling, distribution, transportation, storage, processing, exportation, shipping, marketing and sale of produce whether in the State or out of the State and to operate and maintain services necessary or incidental thereto;**
- (c) upon being required so to do by the Minister, to make recommendations on any matter directly or indirectly relating to the production and marketing of produce;**
- (d) to collect, analyze and disseminate statistical data on agricultural production, particularly horticultural crops and livestock numbers by obtaining basis data on acreage, yield, production and livestock numbers, and to do so initially in collaboration with the Ministry responsible for agriculture with the assistance whenever possible of samples;**
- (e) to assist and advice producers in the selection of commodities and their delivery to the market in order to regulate market supplies and to avoid marketing gluts with a consequent sudden drop in prices;**
- (f) to give, when necessary, in collaboration with the Ministry responsible for agriculture, practical demonstrations to producers in the timing of harvesting fruits and vegetables, and in the preparation and packing of fruits and vegetables for the market;**
- (g) to supply to producers necessary means of production such as seeds, fertilizers and insecticides; and**
- (h) generally to carry out the provisions of this Act."**

The Act also entitles the Corporation the following powers, and/or if not able to accomplish them directly, nominate an agent to do so:

- "(a) to buy and sell produce;**
- (b) Import and export produce;**
- (c) to fix and determine the grading of produce;**
- (d) to establish and operate depots and agencies for the purchase, delivery, grading and sale of produce;**
- (e) to enter into contracts for the transport of produce or of such other commodities as may facilitate the operations of producers;**

- (f) to enter into contracts for the purchase and sale of produce upon such terms and conditions as the Corporation may think fit;
- (g) to establish itinerant systems for the purchase and sale of produce;
- (h) to establish and operate facilities for preparing and processing any produce;
- (i) to establish and operate facilities for cold storage or any other form of storage for produce;
- (j) to act as commission agents for the disposal of the produce of any producer or co-operative society;
- (k) to purchase, transport, store, insure, handle and sell packaging material in such quantities and at such prices as the Corporation may from time to time determine;
- (l) to issue licenses for the exportation of any article of produce approved by the Minister."

5. The infrastructure owned and maintained by CMC consists of:

- Cold storage facilities (6 individual units in operation, some "cosmetic" repairs needed);
- Storage space for rice and sugar, not normally used because these imported products are "pre-sold" to wholesalers);
- Packing room facilities (small but well used);
- Showroom area (used for the display and sales of vegetables, good efforts made to improve the image of the quality sold here);
- Showroom for vegetable and other seeds (needs improvement). The farmers' inputs (vegetable seed mainly) are directed to meet the tourists' demand at the hotels on the type and varieties of vegetables produced;
- Warehouse for farmers' inputs (not visited); and
- One truck.

6. a. The main income sources of CMC are:

- Resale outlet (retail and wholesale of agricultural products, mainly cabbages, tomatoes, green peppers, onions, carrots and potatoes), 10 percent on the CIF is reported to be the margin;
- Mark-up on sugar and rice (reported to be 7 percent);
- *Distribution of farmers inputs (imported by CMC and/or Agricultural Department of the Ministry of Agriculture); and
- Government contributed capital (EC\$ 1 million).

***The ag-chemicals are bought through grants to the Ministry of Agriculture, where CMC acts like the marketing agent for these products. An important correction on the distribution of these inputs is being undertaken; they used to be imported in bulk to be repacked in small containers for retail sale, causing too many problems through the extra manipulations effected (even workers' contamination in some cases). The products are now expected to arrive already packed in the small containers required.**

- b. The financial results of 1990 for CMC were not very promising: total sales of around EC\$ 10.2 million left a gross margin of around EC\$ 963,000, with a net year's deficit (administrative and other costs included) of EC\$ 386.119. This added to the accumulated deficit brought forward give an accumulated deficit of less than EC\$ 5.6 million. The current (accumulated) financial situation for CMC adds up to:
 - EC\$ 5,298,157 net losses;**
 - EC\$ 1,414,438 excess in current liabilities over current assets (this results in a working capital deficit of EC\$ 1,697,044, the main reported problem for the new management)**
 - EC\$ 1,332,603 excess in total liabilities over total assets.****
- 7. The government reorganized all its ministries by October 1989, giving them more autonomy and permitting them to act as independent ministries, contrasting with the centralized policy of having most of them under the Ministry of Economic Development.**
 - a. CMC is under new management (for the last 6 months), with a main goal to redress the Corporation's situation, and at the same time better the image built around its inefficient operations.**
 - b. Farmers had been misled to increase production, with the idea that CMC would buy any quantity available, which was not feasible due to its inefficient distribution. CMC's purchases had to be limited because they were buying more than they could sell, leading to economical losses.**
 - c. With this experience, farmers had to withdraw from CMC and became more aggressive with direct sales to the hotels, leaving the Corporation as the last selling resource.**
 - d. The past experiences of the Corporation in export activities (cucumber and eggplant exports to Miami with low results) have contributed to establish a low image (good-will) of CMC among the farmers.**
 - e. The fact that the Corporation is involved in retail sales (of imported and local products), through their retail outlet, has not helped to better its relationship with the producing sector. Farmers strongly criticize the fact that CMC has used its**

financial efforts in other activities (retail of imported products mainly), far from their main role of distributing domestic production "for the benefit of local producers".

- f. The fact that the high bulk of domestic production comes out at the same time does not facilitate its distribution. Low irrigation capacity does not permit to have a continuous (year round) production.
- g. CMC is in charge of providing demand and supply information to the Minister of Trade to release import licenses when needed. The production information gathered from the field is reported to suffer a "certain" manipulation from the farmers, in order to falsify the volumes of production forecasts to push prices up.
- h. Hucksters are very active (informally) in the domestic market. They buy from CMC to sell the products at the retail level, competing directly with the Corporation's distribution at higher prices. Consumers prefer to buy from hucksters, because of the bad image of the quality sold by CMC. There is a "vendors association", but mainly to look out for the domestic market interests.
- i. There is a Bureau of price control (no further information was obtained on it), but prices are mainly set by the market. No consideration is given to production costs.
- j. The role that CMC plays on price information and market intelligence is very low profiled, mainly done by PROMIS, with little support from the Corporation.
- k. CMC is not providing the farmers or potential exporters with any trade information with export possibilities, in spite of having access to some of the international trade information through the Minister of Trade.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

1. Public Sector

There is no other public importer or exporter of agricultural products in Antigua.

2. Private Sector

There are few efforts made by the private sector to export products from the Island. The direct competition of the high priced domestic market (regulated by retail and wholesale prices and not production costs) make exports of domestic production very difficult to compete with international prices.

- a. CATCO is involved in the country's trade since 1985, when it took over the CMC's responsibility of carrying out all exports.

The volume of exports is relatively small, and no continuous supply is available. The products exported on a regular basis, but had never been able to meet the demand, are:

- hot peppers 500 pounds/week
- sweet potatoes 1,500 pounds/week
- *pumpkins 1,500 pounds/2 weeks

*The production from Trinidad and Jamaica at lower prices is reducing the potential to export pumpkins. Pineapple's price of EC\$ 2.6/pound at the farm level seems too high to compete with the international market, in spite of its good quality.

The list of products normally purchased for export by CATCO amounts to: watermelon, okra, plus the above mentioned ones.

One of the main supply constraints is the lack of a contract with the farmers. CATCO buys from all types of suppliers, small and very small farmers.

The market needs or purchasing needs are informally communicated to farmers. Mostly contacts with farmers that are known to have the needed products in production (i.e. farmers that have irrigation during the dry season).

The products specification is according to those required in the export market. There are no grades nor fixed price relation.

The facilities owned by CATCO in Antigua, in spite of being very small, cover largely its actual needs. They consist mainly of:

- Packing and storage sheltered area (in spite of not being walled lacks ventilation);
- Waxing machine (mainly for cucumbers);
- Conveyor belt;
- Sorting tables (small, and not used much, main activity is packing); and
- 20 ft. cooled container (mainly for hot peppers).

CATCO is reported to be "strict" on quality, when the products do not meet the stipulated characteristics, they are rejected. The buying point is the CATCO's facility. The buying price is the one stipulated by the main office in Bridgetown Barbados.

- b. Global Investments and Clemont farms are the other organized private exporters (the consultant did not visit them). Their main activity is reported to be the exports of galea melons and pineapple (respectively), the first to the U.K. (around 1 container per week), and the second to the U.K. and the regional market (mostly from their own production).

- c. The other exports are being made informally by hucksters at very low volumes, and in a very informal way.

D. DIVERSIFICATION POLICIES

1. There is no stated policy nor policy outline for diversification from the Government of Antigua. The import substitution should come from the expansion of agricultural production. Some of the extension service of the Ministry of Agriculture is directed to inform the (new) crops with market potential, but most of the Government's efforts add to words of encouragement. The main crops attended by the AID Bank are the ones that are being informally promoted through the above mentioned efforts.
2. The agricultural and/or related activities are exempted of income taxes. This type of incentive is not enough to boost the agricultural sector which, among other main problems and insufficiencies, has to deal with the lack of laborers and/or compete with much better paid sources of work, like construction and hotels. Construction is actually paying for a non skill worker around 100 percent over the average wage of EC\$ 30/day for agricultural hand labor. A skill worker (carpenter, painter, etc.) in the construction sector earns from EC\$ 500 to 600 per week.
3. The AID Bank is not financing agricultural marketing activities. The willingness to finance marketing infrastructure exists. Agriculture is not the actual focus of their activity. There is little to no co-ordination between this Bank and CMC (lack of communications).
4. As stated above, the main focus of CMC (even though an address in this policy is being studied) is to distribute agricultural products (mainly imported). There is actually no approach towards a program to develop more efficiently their distribution and/or marketing of agricultural products domestically produced.
5. There is a clear lack of common efforts made by the sectors involved in agricultural marketing – the private and public sector. CATCO is not working closely with CMC, with the exception made when imports of sweet potatoes, citrus and avocados were made by the first and sold to the latter because of convenience of wholesale. The only reported service provided by CMC is the supply of the packing bags (onion type) for pumpkins.
6. The need of better transportation is again affecting trade between the islands, the small planes' space availability makes it impossible to attend market openings that are sometimes presented. According to sources, the government is not making any efforts to address this situation.
7. The need to organize the small exporters and/or the private sector is evident. This is needed to benefit and/or make requests for the sector, not diluting small and personal efforts currently made.

8. There is a lack of cold storage for the use of the private sector. The existing facilities at CMC are not 100 percent utilized. The possibility of renting some of the non utilized capacity should improve the services that CMC has to provide to the private exporters.
9. The lack of a solution to the land tenure problem will continue to affect any expansion of the agricultural sector. In Antigua the Government owns over 60 percent of the agricultural land, some of which is rented at a nominal rate of around EC\$ 1,800/acre/year.
10. The means to control and direct better the farmers' efforts are available but not exploited to the producers' advantage, these are:
 - Technical Assistance Program (from the Ministry of Agriculture with around 50 people)
 - through mass media information (radio & tv)
 - the extension service (through group activities like seminars, training, etc.)
 - The PROMIS Information Service, with complete information of areas and potential production forecasts, and the last price tendencies.

E. STATISTICAL APPENDICES

Table A-1

Loan Analysis 1989 (Provisional)

Source: Agriculture and Industrial Development Bank of Antigua

Table A-2

Monthly rainfall for Antigua

Source: PROMIS & Meteorological Office

Table A-3

– Production of Field Crops 1983-1988

Source: Agricultural Extension Division & Statistics Division

Table A-4

– Data on Food Crop Production

Source: Agricultural Department of the Ministry of Agriculture

Tables A-5

– Selected Crop Imports (Quarterly) 1989 & 1990

– Agricultural Exports (Quarterly) 1989 & 1990

Source: PROMIS

TABLE A-1
LOAN ANALYSIS 1989 (PROVISIONAL)

<u>Sector</u>	<u>No.</u> <u>Approved</u>	<u>Amount</u> <u>Approved</u>	<u>Amount</u> <u>Disbursed</u>
1. <u>Agriculture</u>			
Crop Production	17	\$120,900	\$ 67,537
Livestock	2	25,000	18,655
Fishing	11	665,600	343,053
2. Education (Student)	21	399,713	419,241
3. Housing	179	4,397,000	3,682,961
4. <u>Industry</u>			
(a) Tourism	4	135,400	111,627
(b) Manufacture	3	233,000	50,245
(c) Other	-	-	-
5. <u>Services</u>			
(a) Transport	-	-	3,299
(b) Distribution	4	48,000	40,000
(c) Other	20	293,350	215,628
Other Loans	9	145,300	116,327
	271	\$6,506,263	\$5,216,579

TABLE A-2
MONTHLY RAINFALL
January-December, 1991
(inches)

Location	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
Bethesda	N.A.	N.A.	N.A.	6.15	1.70	N.A.	N.A.	0.34	N.A.	N.A.	N.A.	N.A.	8.19
Cades Bay	2.70	1.90	1.60	5.02	1.15	3.63	3.08	3.51	2.97	7.12	4.32	4.05	41.05
Christian Valley	N.A.	N.A.	N.A.	N.A.	2.32	1.80	3.05	N.A.	5.60	11.90	N.A.	5.59	30.26
Claremont	2.60	2.15	1.70	7.30	2.65	3.54	3.10	3.25	4.65	10.50	3.35	6.38	51.17
Cotton Station	1.10	0.93	0.93	1.03	2.29	2.43	2.04	0.97	0.33	10.70	5.25	1.54	29.54
Diamonds Estate	2.80	N.A.	1.14	5.42	N.A.	2.44	N.A.	N.A.	2.20	12.70	2.44	4.21	33.35
Green Castle	N.A.	1.27	N.A.	4.50	2.95	3.48	1.83	4.09	3.81	10.60	3.24	5.90	41.67
Matthevs	2.00	2.25	1.89	3.51	1.10	1.80	2.45	1.00	1.20	4.76	1.60	3.58	27.14
Montpelier	N.A.	1.65	1.94	7.92	N.A.	N.A.	1.49	1.67	0.92	10.50	2.04	4.41	32.54
Orange Valley	2.06	3.39	1.52	2.96	1.69	N.A.	N.A.	4.23	2.67	9.20	2.66	3.94	34.32
Radio Light House	2.06	2.09	1.69	4.65	2.38	2.94	3.95	3.91	4.20	12.17	2.78	3.92	46.74
V.C.Bird Airport	N.A.	1.85	2.19	5.78	2.93	2.80	2.31	2.52	1.83	9.30	3.51	N.A.	35.02
ISLAND AVERAGE	2.19	1.94	1.62	4.93	2.12	2.76	2.59	2.55	2.76	9.95	3.12	4.35	34.25

Source: Government Meteorological Office and Production & Marketing Intelligence Service (PRONIS) Survey

TABLE A-3
PRODUCTION OF FIELD CROPS, 1983-1988

CROPS	UNIT OF QUANTITY	1983	1984a	1985	1986P	1987	1988
Avocado	'000' s	15.0	82.5	29.8	20.5	23.0	28.0
Bananas	'000 lbs	104.2	685.0	154.4	140.2	154.0	185.0
Beans	"	119.3	81.0	217.8	65.0	76.0	91.0
Beet	"	60.3	14.2	135.3	129.5	142.0	170.0
Cabbage	"	364.6	118.0	258.4	185.0	204.0	245.0
Carrots	"	405.2	557.0	303.9	296.8	326.0	391.0
Cassava	"	96.2	117.0	121.1	61.9	68.0	82.0
Cotton Lint	"	5.0	4.6	72.0	60.0	66.0	79.0
Coconuts	'000' s	516.8	717.0	462.5	514.0	568.0	678.0
Cucumbers	'000 lbs	308.1	318.0	606.6	725.4	297.0	356.0
Eddoes	"	222.4	17.0	27.0	80.0	88.0	96.0
Egg Plant	"	172.3	213.0	343.4	410.6	456.0	547.0
Ginger	"	2.8	91.0	90.0	71.4	179.0	215.0
Grapefruit	'000' s	44.2	97.4	17.8	20.9	123.0	148.0
Hot Peppers	'000 lbs	21.9	32.4	1.1	6.2	4.0	5.0
Limes	"	16.9	51.8	396.0	416.2	458.0	550.0
Maize	"	150.4	396.5	83.0	95.0	105.0	126.0
Mangoes	'000' s	248.9	401.6	812.2	1001.4	1102.0	1322.0
Mellons	'000 lbs	106.3	26.1	270.0	325.4	1235.0	1482.0
Okras	"	131.9	21.0	265.8	105.0	116.0	139.0
Onions	"	102.2	84.0	50.4	61.4	68.0	82.0
Oranges	'000' s	20.6	208.8	70.4	95.4	104.0	125.0
Paw Paw	'000 lbs	-	0.9	1.7	2.4	3.0	4.0
Peanuts	"	0.2	16.0	-	-	-	-
Pineapples	"	398.3	448.0	204.9	210.5	232.0	278.0
Pumpkins	"	255.3	480.0	370.9	389.5	428.0	514.0
Squash	"	187.2	40.0	329.0	140.5	154.0	185.0
Sweet Peppers	"	123.5	193.0	60.2	59.2	65.0	78.0
Sweet Potatoes	"	777.0	1076.0	222.1	365.7	402.0	482.0
Sugarcane	'000 tons	4.6	2.5	-	-	-	-
Tomatoes	'000 lbs	626.5	434.0	331.4	280.5	309.0	371.0
Yams	"	601.1	215.0	60.4	101.6	112.0	134.0

P: Provisional

a: Survey and Census figures from Agricultural Census 1984

Source: Agricultural Extension Division;
Government Agricultural Station;
Statistics Division.

**TABLE A-4
DATA ON FOOD CROP PRODUCTION**

DATA ON FOOD CROP PRODUCTION

(000 lbs)

Crops		1980	1981	1982	1983	1984	1985
Beet	ac						21.0
	lbs						115.0
beet	ac	42.3	61.3	56.5	35.2		62.5
	lbs	33.2	48.2	84.8	52.9		218.4
Cabbage	ac	56.8	72.8	46.8	41.6		52.0
	lbs	178.1	215.9	401.1	364.6		252.4
Carrot	ac	47	56.4	35.5	93.5		63.6
	lbs	272.7	392.5	260.8	405.2		334.5
Cassava	ac	29.6	46.4	28.8	34.3		30.0
	lbs	104.1	237.0	149.0	96.2		120.0
Cucumber	ac	64.9	72.8	64	48		91.0
	lbs	320.5	344.2	326.1	308.1		775.9
Eddoes	ac						9.0
	lbs						27.0
Eggplant	ac	41.5	55.0	66.9	35.7		69.0
	lbs	284.7	291.7	316.9	172.3		348.8

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TABLE A-4 (continued)

Crops		1980	1981	1982	1983	1984	1985
Maize (corn)	ac	55	61.5	41.8	-		55.5
	lbs	62.9	98.9	153.5	150.4		109.7
Melon	ac						49.0
	lbs						27.5
Okra	ac	23.9	19.8	19.0	36.3		41.0
	lbs	182.7	182.1	94.6	131.9		243.4
Onion	ac	12.5	18.4	9.6	15.5		12.0
	lbs	133.5	148.1	85.9	102.2		63.3
Potato (S)	ac	135	144.6	76.2	120.3		70.0
	lbs	397.6	705.9	501.6	777.0		652.7
Peanut	ac	-	2.3	1.07	4.5		-
	lbs	-	3.7	1.4	6.7		-
Pepper (S)	ac	21.9	26	32.9	29.4		20.5
	lbs	148.5	195.1	111.7	123.5		74.4
Pumpkin	ac	18	26.8	49.3	43.1		62.5
	lbs	72.7	139.4	297.9	255.3		27.3

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TABLE A-4 (continued)

Crops		1980	1981	1982	1983	1984	1985
Squash	ac						73.0
	lbs						128.0
Tomato	ac	78	66.8	58	75.3		57
	lbs	211.2	289.6	358.7	725.5		333.0
Yam	ac	50	32.3	4.8	61.0		21.0
	lbs	150.3	105.8	19.8	601.0		77.5

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**TABLE A-5
SELECTED CROPS IMPORTS AND AGRICULTURAL EXPORTS**

Selected Crops Imports

Antigua & Barbuda

Period: I Half, 90

Crop	I Qtr, 90		II Qtr, 90		TOTAL	
	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)
Avocado	15018	22020	1050	9041	16276	32661
Banana	212012	106792	240346	104003	452358	210875
Broccoli	21892	70450	18104	52079	39996	122529
Cabbage	60514	208077	53693	79468	94407	287545
Carrot	1529	4643	5253	10643	6782	18291
Fauli/lover	6448	35639	3377	33391	11225	59511
Celery	17042	41613	11988	21939	29030	63552
Christophine	3263	3902	5261	6999	8524	10901
Cucumber	1234	3698	675	1202	1909	5080
Dashean	7409	10259	9659	11974	16468	22233
Eggplant	366	1980	424	1531	790	3511
Garlic	4616	42268	2172	23724	6788	65992
Grapefruit	22261	22518	25275	24613	47536	47131
Lettuce	30722	82329	23391	61099	54113	143428
Lime	6903	10745	11849	17451	18752	28196
Mango			782	980	782	980
Melon	13333	48224	17562	11940	30895	90164
Onion	1077	3369			1077	3369
Orange	19095	27760	9607	16234	28702	43994
Pineapple	109	762	622	1262	731	2025
Plantain	33364	27788	49341	33685	82705	61473
Potato	201317	271264	109359	159785	310676	431049
Pumpkin	4773	5583	19514	23870	24287	29453
Squash	735	2736	1053	2600	1788	5344
Sweet pepper	1290	7393	185	351	1476	7744
Sweet potato	246	493	770	3335	1024	4328
Tannia	9879	15225	13374	18180	23253	33405
Tomato	1654	12885	8090	44511	9744	57396
Yam	1539	2334	1508	2879	3047	5213
TOTAL	701640	1093540	627115	603501	1328755	1097441

Source: Production & Marketing Intelligence Service (PROMIS)
N.A. Information Not Available
- Nil

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TABLE A-5 (continued)

Selected Crops Imports

Antigua & Barbuda

Period: II Half, 90

Crop	III Qtr, 90		IV Qtr, 90		TOTAL	
	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)
Avocado	31039	145005	19229	32687	50268	177692
Banana	139118	65841	179890	123862	319008	189703
Broccoli	10510	34281	29957	103760	40467	138041
Cabbage	63802	146717	54350	143117	118152	289834
Carrot	38586	84559	47090	133092	85676	217644
Cauliflower	4238	17302	10815	45268	15053	62570
Celery	13900	35652	18912	42693	32815	78545
Christophine	2543	2987	2391	3945	5434	6932
Cucumber	412	742	1160	2835	1572	3577
Dasheen	9430	10007	5091	6442	14521	16449
Eggplant	1593	3534	4757	10209	6350	13742
Garlic	2927	22378	4976	27501	7903	49879
Grapefruit	9994	9022	18949	22207	28943	31229
Lettuce	19405	51340	35717	108602	55122	159942
Lime	11432	14872	9748	12850	21180	27732
Mango	589	338			589	338
Melon	9426	20816	19483	43582	28909	64398
Onion	99951	158195	97315	119851	197266	278046
Orange	17788	15193	60939	69717	78727	84910
Pineapple	267	815	150	507	417	1322
Plantain	56423	41801	54342	45977	110765	87778
Potato	95898	128904	207946	255684	303844	384588
Pumpkin	15906	15275	16788	41125	32594	56400
Squash	1361	3358	1960	4637	3321	7995
Sweet pepper	4462	24034	16522	77684	20984	101718
Sweet potato	30148	54224	25365	48449	55513	102673
Tannia	6984	9814	10257	11908	17241	21722
Tomato	51861	276055	50270	274787	102131	550842
Yam	1654	1772	3950	4236	5604	6008
TOTAL	751550	1395036	1098619	1817213	1760369	3212249

Source: Production & Marketing Intelligence Service (PROMIS)
 N.A.: Information Not Available
 - Nil

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TABLE A-5 (continued)

Selected Crops Imports

Antigua & Barbuda

Period: II Half, 89

Crop	III Qtr, 89		IV Qtr, 89		TOTAL	
	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)
Avocado	20299	30256	38297	53105	58596	83361
Banana	84999	77614	120195	79841	205194	157455
Broccoli	16459	35014	16192	55144	32651	90158
Cabbage	107701	144063	34741	81641	142442	225704
Carrot	42917	92196	41040	95375	83957	187571
Cauliflower	6664	32555	8596	34156	15260	66765
Celery	15231	35176	17818	44041	33049	79217
Christophine	2007	2543	5016	6950	7025	8593
Cucumber	537	1592	946	2765	1483	4357
Dasheen	3377	4214	8973	3496	12350	13710
Eggplant	567	1566	1563	11500	2130	13066
Garlic	5245	36389	4505	33332	9750	75321
Grapefruit	6871	7312	12238	11620	19109	18932
Lettuce	20805	55631	24536	30787	45341	136418
Lime	5349	7436	11790	15847	17139	23283
Mango	119	1050			119	1050
Melon	9496	16573	11728	30115	21224	46688
Onion	91529	103956	39019	135260	180548	242216
Orange	6609	6694	52493	56396	59102	63090
Pineapple	28	244	255	1202	283	1446
Plantain	33907	30414	18846	15443	52753	45857
Potato	146931	154828	114105	136732	261036	291560
Pumpkin	5277	7088	17391	24763	23268	31851
Squash	264	1040	1466	3642	1730	6682
Sweet pepper	15766	34324	14244	77965	30010	112289
Sweet potato	365	1149	11583	14096	11948	15245
Tannia	6673	9339	8681	12117	15354	21456
Tomato	57560	190855	45867	248329	103427	439184
Yam	1578	2416	5143	6831	6721	9247
TOTAL	715130	1124127	737869	1307585	1452999	2511712

Source: Production & Marketing Intelligence Service (PRONIS)
 N.A. Information Not Available
 - Nil

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TABLE A-5 (continued)

Selected Crops Imports

Antigua & Barbuda

Period: 1 Half, 89

Crop	I Qtr, 89		II Qtr, 89		TOTAL	
	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)	Quantity (kg)	CIF Value (EC\$)
Avocado	9840	22871	572	2053	9512	24924
Banana	68822	65527	64395	57381	133157	122908
Broccoli	5957	23881	10070	32085	15027	55966
Cabbage	55004	99746	42942	110631	97946	210377
Carrot	25067	57116	1329	4739	26396	41855
Cauliflower	4516	22565	6167	26075	10683	45640
Celery	35495	46800	12885	26753	48380	75553
Christophine	6371	2008	2094	2509	8455	4517
Cucumber	41	339	431	1534	472	1073
Dasheen	2964	3877	5764	5049	8746	8926
Eggplant	386	913	996	825	1382	1738
Garlic	5390	34236	4360	32279	9750	66515
Grapefruit	4599	6485	8658	9358	13257	15843
Lettuce	20595	57367	23367	60570	43962	117937
Lime	472	830	6438	10636	6910	11466
Mango			68	257	68	257
Melon	14989	49462	4387	13510	19376	61972
Onion	75257	126423	21567	48780	96764	175203
Orange	6189	10428	6709	14253	12898	24681
Pineapple	2143	7136			2143	7136
Plantain	34678	22244	24094	24215	58772	46459
Potato	171506	149087	152996	185867	324504	334954
Pumpkin	4730	4210	8597	10262	13327	14472
Squash	728	2308	279	1197	1007	3505
Sweet pepper	21913	82531	10580	29964	32501	112515
Sweet potato			175	409	175	409
Tannia	4750	5866	4421	5999	9171	11865
Tomato	28288	95880	5537	19426	33825	115308
Yam	721	1203	153	885	1174	2088
TOTAL	610401	981332	430311	735523	1040742	1716862

Source: Production & Marketing Intelligence Service (PRONIS)
 N.A. Information Not Available
 - Nil

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TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: I Qtr, 90

Crop	January, 90		February, 90		March, 90		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot	46	687					46	687
Cotton								
Cucumber	23	44					23	44
Eggplant			17	99			17	99
Mango								
Melon	34837	48768			46313	28800	81150	77568
Okra								
Pepper-hot								
Pepper-sweet								
Pineapple					250	1553	250	1553
Potato-sweet								
Pumpkin	9873	8550	21200	17800	9455	8300	40528	34650
Soursop								
Tamarind								
Others	13383	15686	8285	22058	2431	5940	24099	43684
TOTAL	58162	73735	29502	39957	58449	44593	146113	158285

Source: Production & Marketing Intelligence Service (PRONIS)

TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: II Qtr, 90

Crop	April, 90		May, 90		June, 90		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot								
Colton								
Cucumber								
Eggplant								
Mango								
Melon			5040	4030			5040	4030
Okra								
Pepper-hot								
Pepper-sweet			10	8			10	8
Pineapple	182	1110	68	400			250	1510
Potato-sweet								
Pumpkin								
Soursop								
Tamarind								
Others	7806	21439	5754	17000	4045	8900	17605	47339
TOTAL	7988	22549	10872	21438	4045	8900	22905	52867

Source: Production & Marketing Intelligence Service (PROMIS)

TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: III Qtr, 90

Crop	July, 90		August, 90		September, 90		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot								
Cotton								
Cucumber								
Eggplant								
Mango								
Melon								
Okra								
Pepper-hot								
Pepper-sweet								
Pineapple	91	4570			5	50	96	4620
Potato-sweet								
Pumpkin								
Soursop								
Tamarind								
Others								
TOTAL	91	4570			5	50	96	4620

Source: Production & Marketing Intelligence Service (PROMIS)

TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: IV Qtr, 90

Crop	October, 90		November, 90		December, 90		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot	450	887					450	887
Cotton								
Cucumber	320	547					320	547
Eggplant								
Mango								
Melon								
Okra								
Pepper-hot								
Pepper-sweet								
Pineapple			91	570	68	450	159	1020
Potato-sweet								
Pumpkin								
Soursop								
Tamarind								
Others	4271	8508	2066	4438	64	909	6401	13855
TOTAL	5041	9942	2157	5008	132	1359	7330	16309

Source: Production & Marketing Intelligence Service (PRONIS)

TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: I Qtr, 89

Crop	January, 89		February, 89		March, 89		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot								
Cotton								
Cucumber								
Eggplant								
Mango								
Melon	8954	17731	5170	5560	2200	3520	16324	26811
Okra								
Pepper-hot								
Pepper-sweet								
Pineapple	1501	300			318	1195	1819	1495
Potato-sweet	291	256	1500	1452			1791	1700
Pumpkin			5016	4856			5016	4856
Soursop								
Tamarind								
Others	60	360			191	201	251	561
TOTAL	10806	18647	11686	11868	2709	4916	25201	35431

Source: Production & Marketing Intelligence Service (PRONIS)

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TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: II Qtr, 89

Crop	April, 89		May, 89		June, 89		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot								
Cotton								
Cucumber								
Eggplant								
Mango	5	20					5	20
Melon	24369	39052	23930	48352	19092	8728	69391	116132
Okra								
Pepper-hot	145	400					145	400
Pepper-sweet								
Pineapple			113	662			113	662
Potato-sweet	10	20					10	20
Pumpkin								
Soursop								
Tamarind								
Others	4225	8172					4225	8172
TOTAL	28754	67664	26043	49014	19092	8728	73889	125406

Source: Production & Marketing Intelligence Service (PROMIS)

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TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: III Qtr, 89

Crop	July, 89		August, 89		September, 89		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green					125	520	125	520
Carrot					70	391	70	391
Cotton								
Cucuaber								
Eggplant								
Mango			25	100			25	100
Melon								
Okra					170	1000	170	1000
Pepper-hot								
Pepper-sweet								
Pineapple	60	397					60	397
Potato-sweet								
Pumpkin								
Soursop								
Tamarind								
Others					9085	11465	9085	11465
TOTAL	60	397	25	100	9450	13376	9535	13873

Source: Production & Marketing Intelligence Service (PRONIS)

TABLE A-5 (continued)

AGRICULTURAL EXPORTS

Antigua & Barbuda

Period: IV Qtr, 89

Crop	October, 89		November, 89		December, 89		TOTAL	
	Quantity (kg)	FOB Value (EC\$)						
Bean-green								
Carrot			655	637	909	1354	1564	1991
Cotton								
Cucumber			338	1318			338	1318
Eggplant			51	22			51	22
Mango								
Melon			73	150	4731	19742	4804	19892
Okra								
Pepper-hot								
Pepper-sweet			127	241	318	489	445	730
Pineapple					587	2190	587	2190
Potato-sweet								
Pumpkin								
Soursop								
Tamarind								
Others			3483	5064	3436	6042	6919	11106
TOTAL			4727	7432	9981	29817	14708	37249

Source: Production & Marketing Intelligence Service (PRONIS)

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TECHNICAL ANNEX B

DOMINICA

CHEMONICS

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**TECHNICAL ANNEX B
COUNTRY: DOMINICA**

A. DESCRIPTION OF ISLAND'S AGRICULTURE

The island of Dominica is probably one of the most agricultural of the OECS states. In 1989 the agricultural production contributed around 27 percent of the country's Gross Domestic Product (see Table B-1). The fertile volcanic soils and its very important rainfall (approximately 300 inches per year) help the State's agriculture. The high mountainous interior topography does not facilitate the mechanization of most of the farming land.

1. Area: 290 square miles

2. Population and percent in agriculture

The total population is estimated at around 80,000 people mainly located throughout the low coastal lands, approximately 31 percent live in the two main cities of Roseau (20,000) and Portsmouth (5,000).

There are very different opinions on the percentage of the total work force involved in agriculture, ranging from 50 percent to 32 percent. According to the 1980 census, around 22 percent of the total work force was employed in agricultural activities, and 20 percent related indirectly to the sector.

3. Main agricultural production and exports

According to the last available statistical information (1989); 9 traditional agricultural products (banana, coconut, grapefruit, plantain, orange, lime, coffee, cocoa, and bay leaf) account for over 69 percent of the total volume of the agro-production (Table B-2-a).

Total exports of fresh products for the same year 1989 were 55,548 kg. (Appendixes Tables 2-b and 2-c). According to this information, we can appreciate that the regional market represents a very important segment for most of the agricultural exports, except banana exports (over 98 percent is for the extra-regional market). Banana exports influence directly total exports from Dominica, as appreciated for the series of exports in EC\$ (Graphic B-2).

There are other products that have a good potential and have been marketed to the extra-regional market, but in lesser importance, like grapefruit, plantain and dasheen. Around 25 percent, 26 percent and 22 percent respectively, of these crops are exported to extra regional markets, the balance to the regional market. The rest of the listed products are marketed within the regional market.

The country's trade bottom line figures could be misleading in the analysis of the potential of the regional market and the future of the diversification plans to export nontraditional products. Banana exports account for approximately 92 percent of total exports (85 percent of the banana exports were effected to the United Kingdom in 1989). The regional trade for the period of 1983 to 1989 barely averages 9.4 percent of total exports while the extra-regional market accounts for the balance (90.6 percent).

B. ORGANIZATION AND STRUCTURE OF MARKETING BOARD

The government's institution in charge of the marketing of agricultural products in Dominica is the "Dominica Export and Import Agency" (DEXIA).

1. The name and number of enabling legislation setting up the board are: "**Dominica Export and Import Agency Act, 1986**". "Act No. 14 of 1986 of the Commonwealth of Dominica." Put into operation on the 1st. of July 1986.

"An act to make provision for the establishment of a corporation to promote the export of agricultural produce and to undertake the import of essential commodities".

2. DEXIA acts as an independent agency of the Ministry of Trade and Industry.
3. The Act stipulates that the Board of the Agency will have a minimum of 7 (seven) and maximum of 9 (nine) members appointed by the Minister of Trade, for a period not exceeding 2 (two) years (actually being appointed for 1 (one) year term, with the option of re-appointment).

The Minister of Trade is also in charge of appointing the Chairman and Deputy Chairman of the Board. The Board will designate the General Manager (subject to the Minister's approval), who will act as "Chief Executive Officer and Secretary of the Agency".

In the actual Board of DEXIA, the trading sector is mainly represented, the interaction with the production sector is not formal (this latter is not represented in the Board).

4. The main powers granted by the Act to DEXIA are:
 - a. "Purchase and sell any produce, but, in any case where the marketing of such produce is under the control of another statutory authority or any other organization, only with the consent of the Minister;
 - b. purchase, import and sell any essential commodity*;
 - c. establish and operate depots for the purchase, sale, grading, packing and delivery of produce including specified produce**;
 - d. establish storage and wholesale facilities for the sale of essential commodities;
 - e. enter into contracts for the transport of any produce including specified produce;

- f. enter into contracts for the procurement and supply of essential commodities the supply of which may facilitate the operations of the Agency;
- g. establish itinerant systems for the purchase and collection of produce;
- h. establish and operate -
 - (i) cold storage facilities
 - (ii) factories, plant or other facilities for the preparation, processing, packaging or storage of produce;
- i. advise the Minister and the regulatory authorities on the grading and standardization of produce;
- j. purchase, transport, store and sell any packaging material used in connection with essential commodities or produce including specified produce;
- k. fix prices at which it shall purchase any produce including specified produce and at which it shall sell such produce;
- l. make initial payments or advance money to agricultural producers and specify the terms and conditions upon which such payments or advances will be made;
- m. purchase agricultural machinery, equipment, implements, fertilizers and other agricultural requirements for the use of, or for sale or loan to, agricultural producers;
- n. carry out, research, training and consultant activities in marketing, sponsor trade fairs, and trade missions, compile and issue journals, bulletins and other publications or promote the carrying on by other bodies or persons of any such activity;
- o. collect, collate analyze and circulate statistical and other information relating to agriculture;
- p. do all such other things as, in its opinion, are necessary for or conducive to the effective discharge of its duties under this Act."

*** The "essential commodities".-** The Minister is entitled to declare any commodity imported into the country as "essential commodity", enabling the Agency (DEXIA) as its sole importer. The Agency could grant an import license to "any person" to accomplish the imports of the said commodity. Any unauthorized import of the commodity will be declared illegal and subject to legal sanctions.

**** The "specified produce".-** The Minister is also entitled to declare any product of Dominica as "specified produce", enabling DEXIA to be "the sole purchaser, handler, processor, seller and exporter of any specified produce". The Agency can grant a license to "any person" in order to carry on with the purchasing, selling or exports of

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any specified produce. This license is not necessary if the "specified produce" will be domestically consumed.

"The Agency may appoint such persons as it considers necessary as agents for-

- a. the purpose of purchasing, selling or processing any produce, including specified produce;**
- b. the purchase and importation of an essential commodity."**

Under these powers granted, the Agency holds the monopoly on sugar and rice imports (actually the only restriction reported on agricultural commodities imports). Additional sugar imports are permitted only to the 2 (two) bottling companies operating in the Island. DEXIA designates the private sector for fertilizer imports "only" for the Dominica Banana Marketing Corporation (DBMC). There are no particular licenses, at the moment, for imports of other inputs.

The Agency is also granted the power, subject to the Minister's approval, to:

- a. "prescribe the grades and types of specified produce which it shall accept from producers;
 - b. determine the prices it shall pay to producers in respect of any grade, type and quality of specified produce;
 - c. provide for the examination and grading of specified produce which it procures and shall from time to time publish such information by way of national radio or a newspaper published in Dominica".
5. DEXIA's Market Support Services Department (MSSD), acts as the operational arm of the Agency. This Department has 27 people in its staff, including the General Manager, who controls and directs all the rest of employees: Market Development Officers (5), Staff of Central Services (4). Staff of the Commercial Department (10). Roseau Market Staff (7).

DEXIA is the main authority of the Roseau market, the Agency maintains and operates it. The market is considered to be the "main point for commercial activity" in the capital, where not only agricultural products are being sold, but manufactured goods. The commercial activities there, are carried out at the wholesale as well as the retail level.

The building owned by the Agency in the city of Roseau holds the main offices as well as the warehouse for the imported sugar and rice. The warehouse capacity of covered storage is estimated at 2,075 M.T. (20,000 plus 21,500-50 kg. bags stacked without pallets store capacity).

There are facilities actually under construction, cold storage area (500 sq. ft.), dry storage (1,000 sq. ft.), as well as a packing unit, and space reserved for offices and a

custom bonded warehouse at the Melville Airport. This unit is estimated to start operation by the month of August.

The Agency is not actually involved in commercial exports, these are a result of the private sector's efforts. Only low-scale export trials are carried out by DEXIA. Some exporters would like to see the Agency ensuring that proper infrastructure for exports is available.

6. The main income source for DEXIA is the profit made by the mark-up on the imported (by the Agency) rice and sugar sales. Additional funding from International Agencies is also available (i.e., the funding to install the Melville Airport facilities by the Canadian International Development Agency -CIDA-). The sugar and rice import profits are actually covering the Agency's costs of the export trials undertaken as part of the efforts to develop and establish new export markets.
7. The objectives of DEXIA for 1992 define clearly the interest on boosting agricultural exports:
 - a. "... increase by the end of 1992, extra regional exports of fresh produce by at least 50 percent: (approximately 400,000 Kg.) above the estimated for 1989, and regional exports by 15 percent (540,000 Kg.) above the 3.59 million Kgs. exported in 1988.
 - b. ... initiate Dominica's strategic position in the international market as a reliable supplier of high quality frozen exotic (fruit and root) vegetables and of other selected fresh and processed produce."

DEXIA's short-term activities are directed mainly to correct the weak sides of the export business actually experienced in Dominica and communicated to the consultant during the country's visit. These five main points, as published by the Agency, are:

- **Information.-** Mainly supply and demand (market and product) information.
- **Standards.-** Establish and train for export standards.
- **Assistance to Exporters.-** The Agency will implement an assistance program for selected exporters.
- **Increase exports/market led.-** Through market research, feasibility studies, promotion, trial shipments and market development.
- **Transportation.-** Improve the frequency of sea and air transportation.

All these short term activities are somewhat ambitious and will demand great efforts to accomplish them. To improve transportation service into Dominica, the volume and the continuity (good planning needed) of the exports should have to be drastically increased. This can only be accomplished with established and secured markets, the need to combine small shipments to make a larger volume is also present.

A move from banana production into other existing products with good productive potential is expected for 1992-93, specially for banana marginal producers. A marketing entity (institution) will be "urgently needed" to market the production resulting of this "diversification", a similar system than the one used for bananas would be ideal. DEXIA would be willing to play this role, but an important financial support and facilities upgrading will be needed to accomplish these new tasks.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

Other Statutory Boards

The Dominica Banana Marketing Corporation (DBMC) is the other statutory institution with the power to export agricultural products. The DBMC is also entitled to import farmer inputs for its associated producers, intended only to be used in the banana production.

1. The name and number of enabling legislation setting up DBMC are: **"Dominica Banana Marketing Corporation Act" 1984. Act No. 11 of 1984.**

"An Act to provide for the development of the banana industry and for the establishment of a banana marketing corporation".

2. DBMC is established under the responsibility of the Ministry of Agriculture.
3. The composition of the Board of DBMC is of 9 (nine) members, its appointment is stipulated by the Act as follows:
 - "(a) three members on the nomination of the Annual General Meeting of the Association or any person nominated by the Central Committee to fill any vacancy;
 - (b) the Executive Secretary of the Association;
 - (c) three members from the business community including at least one member from the banking sector, on the nomination of the Minister;
 - (d) one member representing the Ministry of Agriculture, on the nomination of the Minister; and
 - (e) one member representing the Ministry of Trade on the nomination of the Minister."

The Minister of Agriculture will appoint the Chairman and Deputy Chairman among the above mentioned members. The duration of the appointments for the members under the letters (a) and (c) are a maximum of 3 (three) years, with a forced retirement after one year (eligible for re-appointments) and one after two years.

The General Manager's appointment is recommended by the Board and approved by the Minister of Agriculture for a period of 2 (two) years.

4. The Act entitles DBMC as the **"sole purchaser of bananas for export to countries outside the Caribbean area."** There are 8,616 registered banana growers in the Corporation, of which 6,675 sold fruit to the DBMC during 1990.

The Corporation provides services for banana production to all the registered farmers. Probably the most important of the provided services is the supply of inputs directly imported duty free. To accomplish this last service, DBMC has set up its own personnel and facilities in 6 (six) strategic distribution points ("input centers").

The reported sales of 10,650 M.T. of inputs for 1990 banana production show an increase of 25.7 percent over the previous year except for calcium ammonium nitrate. This is explained as an effort made by producers to increase production and the quality of the product to be exported.

DBMC has no commercial competition on the sales of specific inputs for banana production. The United Kingdom and France are the most common suppliers of these products. Imports are planned according to the programmed production of bananas.

A committee is appointed by the Board to decide the contracting with one of the bidders (not a public bid) to assure input imports. Price and quality are the main purchasing factors, quality has to be as close as possible to the required specifications in the bid. Most bidders are international companies with local agents.

The price of these inputs for banana producers is the CIF (landed cost) plus a 9 percent mark-up to cover transportation and administrative costs incurred in this operation.

Another very important service provided by DBMC to the banana producers of the island (not only to their associates) is the phytosanitary control in "all the banana plantations" in order to control "sigatoka". A sum of almost EC\$ 5.4 million is reported to have been expended for this activity during 1990.

Packaging material is also provided by DBMC to its associated producers. The high price paid for carton boxes is reported to be the "highest single cost item". The average price paid to the 2 (two) suppliers (ABC Containers Ltd. from Dominica and Winera from St. Lucia) is of EC\$ 2.81 per unit.

5. The Corporation, in addition of the 6 input centers, owns and operates 13 (thirteen) inland banana depots, used as inspection points for packing and weight control of each box for the product that comes already packed from the field (at the farm level). Growers can also go directly to the port, where GEEST and/or DBMC personnel will carry out the inspection. In this case the Corporation will cover the transportation cost. The infrastructure available at the port is a covered but not refrigerated storage area.

GEEST, as the marketing agent of the Corporation, is in charge of fulfilling the phytosanitary standards for exports (i.e., fumigation for insects and pests control of the shipment..).

6. The major income source for DBMC as reported for 1990 is banana sales, plus around EC\$ 3.5 millions on revenue grants from: USAID, Winera, Geest Ind., investment income and the gain on foreign exchange, plus others.

The reported finances of the Corporation for 1990 are:

- Banana sales revenue EC\$ 81,987,227, a 21.8 percent increase over 1989, attributed to a better selling price and favorable exchange rate.
 - The Hurricane Hugo Rehabilitation Program and the Banana Replanting Program (of which around 50 percent is reported to be given to producers as a subsidy) have cost EC\$ 413,455 and EC\$ 653,412, respectively.
 - The Corporation's total cash and short term investments changed from EC\$ 5.1 million in 1989 to EC\$ 2.8 million in 1990.
 - The costs of sales are reported to amount to EC\$ 49,275,360 leaving a gross profit of EC\$ 32,692,573 plus the surplus on sale of inputs totalling almost EC\$ 33 million, less the operating and administrative expenses, plus the development levy plus others accounted for a total EC\$ 36,074,377, leaving a bottom line deficit of EC\$ 3,451,004 for 1990. This figure presents an improvement over the EC\$ 5.9 million accumulated deficit for 1989.
7. The main concern of the DBMC Board is the quality of the exported product. During 1990 production, Dominica, in spite of being the supplier with better quality among the other Windward banana exporters, which are St. Lucia, St. Vincent and Grenada, did not meet the expected goals. There is a clear scope of the quality level required in order to compete in the expected "Single Market of 1993". Certain measures are being taken to readdress the quality problem, mainly on the final presentation of the product, such as better packing material, uniform size of fingers, etc..

Another relevant problem reported by the Board is the high number of small producers (of low volumes) who do not contribute to make the banana industry more efficient. The 71 percent of the total production sold to DBMC was effected by 28.4 percent of the total 6,675 banana producers that transacted with the Corporation.

Furthermore, the credit portfolio shows that 62 percent of total registered producers (that account for only 11 percent of the total produced volume) owe 60 percent of the total outstanding (debt); in other words, too much efforts are made to serve these inefficient banana producers. The "positive contributors" are reported to be the ones who would sell to the Corporation a minimum of 10 (ten) M.T./year.

The average price received at the farmers level for the 1990 banana production is of EC 36.67 cents per pound.

A perceived but non public short-medium term policy of DBMC would be to concentrate or consolidate the Corporation efforts in the "positive contributors", leading the smaller producers to seek efficiency on other crops.

Private Sector

Private efforts are being made in order to establish an efficient export business. During the consultant's visit to Dominica, contacts were made with the following entities involved somehow in exports:

- the Dominica Hucksters Association,
- the Citrus Growers Association,
- R & R Exports
- the Dominica Floral Exports

1. The Dominica Hucksters Association

- a. An association organized as a non profit "Friendly Society" (income tax free). The over 400 members, of which 85 percent are reported to be women, are mainly wives of agricultural producers.

There is a Board of Executives elected at the General Meeting of the Association for a 2 (two) year term. This Board is in charge of conducting the Executive of the Association and is responsible for the "general direction and control of the affairs of the Association". It consists of 8 (eight) elected members plus 5 (five) "Ex-officio" nominated persons (in advisory capacity with voting rights) from the Ministry of Agriculture, AID Bank, Government Export Marketing Arm (in this specific case is DEXIA), Management and Development Organizations.

The elected Executive Secretary of the Association acts as the general manager, responsible and subject to the control of the Board.

- b. The Hucksters Association claims that over 70 percent of the country's regional exports (Caribbean region) of fresh fruits, vegetables, root crops, and cut flowers is accomplished by them. The shipments range in value from EC\$ 500.00 to 10,000.00.
- c. The following is the published list of products exported by the Association:
- Fruits: oranges, grapefruits, limes, plantains, bananas, avocados, mangoes.
 - Vegetables: pumpkins, christophines, tomatoes, cabbages.
 - Rootcrops: yams (all types), tannias, dasheens, sweet potatoes.
 - Cut flowers: anthuriums, ginger lilies, others.
 - Spices

- d. The main objective of the Association is reported to be directed mainly to quality of produce bought and retailed. A careful manipulation at the processing (washing, grading and selection) is reported.

As most of the members are scattered on the island, they are encouraged to pack at the purchasing sites (mainly their own farms), in this way the Association would only have to inspect and grant certificates at its facilities. The product's presentation is also encouraged to improve by the use of proper (adequate) packing materials as well as standard size boxes.

Among the services provided by the Hucksters Association to its members we can name the following:

- Provide with packing material (directly imported duty free).
- Shipping arrangements and documents.
- Funding of cash flow and/or working capital (up to EC\$ 4,000 loan at a monthly rate of 1 percent). The funds come from the Inter-American Foundation.
- Training in postharvest handling, packing, marketing, etc..
- Market research, advises them accordingly.
- Mediates in disputes with local farmers.

There are other services provided, mainly clerical type (process income tax, obtain visas for travel, etc.). Low literacy level of the members is common in spite of "efforts made since 1984".

Members are reported to follow a movement towards self sufficiency (not needing much of the Association's fatherly coverage). The security of the market by maintaining their customers is permitting them to make more personal and/or individual efforts (i.e., the purchase of their own transportation mainly pick-up trucks).

- e. The Association owns a small building at Fond Cole, where the offices are located. A covered area of around 1,000 square meters is available for packing and sorting as well as inspecting the shipments. The total lot space is estimated to be around 1 1/4 acres (roughly 1/2 a hectare), which allows for any type of expansion of the existing facilities. Transportation is reported to be owned by most of the associates. The Association does not provide any transportation service to its members.
- f. The main funding sources of the Hucksters Association are:
- 10-15 percent mark-up on the packing material distributed to the exporters,
 - interest of loans made to members from Association funds,
 - membership fees (EC\$ 30.00/year),

- shipping document charge (EC\$ 5/ea. processed document).
- income tax processing services (EC\$ 25.00),
- fee for a letter of recommendation for non-members (EC\$ 25.00) and
- grants (mainly from USAID and the Inter-American Foundation), mainly directed to cover the Executive Secretary's salary.

Production levels and/or goals can be influenced by the Hucksters. The influence that they have on the production sector (farmers) is undeniable. A large percentage of the members are producers having their wives do the marketing as the Association's member. Actually small farmers' production is reported to be according to the huckster's buying capacity in detriment of the Government's production plans.

2. The Dominica Citrus Growers Association

- a. The Dominica Citrus Growers Association is a statutory board of associated growers organized under the Cooperative status. This institution that exists since 1954 is actually under liquidation. The main reported reasons for the close-down of business are the low production volumes (as a result of low paid prices) of grapefruit (the most important citrus for the Association) and the difficulty to compete in the international market.

- Production has dropped from a weekly output of 30,000 - 40,000 cartons (15 Kg. ea.) to an actual 10,000 - 15,000 level. This drastic decrease in production is attributed to a decreasing price of grapefruit while the production and processing costs have increased.

The price paid to farmers during 1978 at the plant was EC\$ 11.00 per box, and the actual price on the boat is EC\$ 11.30. Better prices paid for bananas are directing interests from citric farmers into banana production.

- The seasonable U.K. market is better matched by Israel in detriment of Dominica's production, which managed to export only 14,000 boxes during 1990 to the U.K. (data info to be confirmed later in Dominica).
- b. The number of workers to be employed, during the highest production peak, at the processing plant (washing, grading and packing) of the fresh fruit has dropped from 250-300 to 40-50 workers.
- c. The only exported product by the Association is grapefruit. (To be confirmed in Dominica)
- d. The processing plant for citric products is partly owned by the government. The latest investments to improve its operations were made in 1985-86, totalling to around EC\$ 1.3 million (around EC\$ 500,000 invested directly by the Association and around EC\$ 800,000 from the Canadian Development Bank).

The close-down of business of the Growers Citrus Association is expected to be a "strategic movement" to change the organization from the cooperative to the corporation status. The move to the corporation status, similar to DBMC is expected to increase production efficiency. The low production levels of 7 M.T./acre could be increased by an adequate fertilization program. The major constraint to increase fertilization is fertilizer's cost. An estimated 3,000 acres of grapefruit are reported to be unattended.

3. R & R Exports

- a. This is a clear example of the private sector efforts, the lack of Government support would justify the small scale of operations and infrastructure of this company.
- b. Ninety percent of the exports are directed to the U.K. and 10 percent to the regional market. Exports amount to around EC\$ 50,000 per month on the highest peak of the season. Shipments are made on a weekly basis, mandated mainly by the sole GEEST boat to the United Kingdom every Friday morning.
- c. The exported product list is very ample: ginger, mangoes, christophine, bananas, coconuts, dasheen, tannia, hot peppers, pumpkin, lime, grapefruit, cinnamon sticks, passion fruit, cassava farina, cocoys. From this list the two main exported products that account for the main bulk are dasheen (100 boxes per week) and plantains (120 boxes per week), mainly directed to the ethnic market in the United Kingdom, in 45 and 30 pound boxes, respectively.
- d. R & R buys exportable products in bulk from around 40-50 small producers, located relatively close (in the area). The washing, packing and grading is done at the Company's facilities, mainly by 6 (six) people plus the owner. R & R is also involved in agricultural production (mainly plantains). The crops and production systems are copied by some of the other farmers in the area.
- e. The infrastructure owned by R & R is small, but totally installed with its own capital. Around EC\$ 146,000 have been invested in the packing facilities (98,000 building and 48,000 land). A high cost-quality construction (brick) had to be made, because of the building inspection and regulations for buildings that will hold workers. The Company also owns a truck (4 M.T. capacity) to transport the products to the port, located approximately 1 (one) hour away.
- f. All the financial efforts and investments have been made directly by the owner. No government or official financing was obtained for this operation.

Corrections on the operation are continuously made. Priority is given according to the economical capacity and its urgency. There is the need to improve the packaging to a similar type as the boxes used for banana exports for certain products. They have to identify the adequate packaging for most of their products, relying on the local supplier's availability.

The infrequent transportation is a major constraint to increase volumes and number of products to export within the region.

The lack of official support makes the operation less cost efficient; the most evident need is power supply. The high voltage lines are 200-300 meters away from the packing building, but the high cost of connection (estimated at EC\$ 21,000) and the low financial capacity force R&R to continue to rely on its fuel run power plant as a source of electrical energy for water pumping and other electrical appliances.

The R&R export activities for exports to the United Kingdom are very well planned:

- product collection on Tuesday afternoons
- packing on Wednesdays and Thursdays,
- transport to port on Thursday afternoons-nights,
- ship leaves on Friday mornings.

4. Dominica Flower Exports

- a. It is envisioning the export business in a more organized manner. Operations started as a "family-type" business. They count with an experience of 9 months of informal exports. There is a contact (family member) in the United Kingdom, who is acting as an agent, identifying the market opportunities and setting selling prices.
- b. The actual exports are under 100 kg./15 days, working mainly on existing production bought from 4-5 farmers.
- c. The exported flowers are anthuriums, ginger lilies, heliconias and dracaena.
- d. The shipping and packing is done by themselves. The carton boxes used for the flower exports are made under specific order, by the local industry, which makes them very high cost (EC\$ 6.00 each box).

The price paid to farmers is around EC 35 cents/flower, which competed highly with the normal domestic price of EC 20-25 cents/flower. Obviously better quality and grades are demanded. The selling price (CIF) to the flower shops averages around 70 pens/large flower and 50 pens/medium.

- e. No actual infrastructure is owned by the company.
- f. All its operation is self financed and a result of its own efforts and initiative.

Air transportation is used for these exports, LIAT from Dominica to Antigua, British Airways continues from Antigua to the United Kingdom. The high air transportation cost accounts for around 50 percent of the total CIF price (in the United Kingdom). Expected negotiations with the airlines should bring this cost down.

An imminent need to have an organization and/or association of cut flowers producers and/or exporters is present.

The targeted market (United Kingdom) is experiencing a decrease in demand of high priced flower bouquets, reported to be an effect of the economical recession.

There is a lack of promotion of tropical flowers in the U.K.. This plus market prospecting should be DEXIA's role. Some of the information disclosed by DEXIA is reported to lack details (i.e., information on import regulation for the different markets).

There is no specific program such as research and development of new hybrids to promote the flower business at the production or commercial levels.

Contrasting with other cut flower businesses, tropical flowers do not require cold storage facilities, but packing has to be done at the cutting places, where no infrastructure exists.

C. DIVERSIFICATION POLICIES

1. The Ministry of Agriculture is conducting a crop development program to identify the production potential of several products with export potential, like breadfruit, avocados, mangoes, plantains, melons, ginger, potatoes, and vegetables. In spite of not being a specific diversification program (info to be confirmed in Dominica in July), the research and development information disclosed by the Ministry of Agriculture is valuable at the farmers' level.

The need to establish profitable crops other than bananas is imperative thus the efforts of the Ministry of Agriculture to develop new crops should be more market oriented. A lack of coordination and misinformation on the targeted products is evident among the different Government entities that should support the agricultural sector; Agricultural Department, DEXIA, and AID Bank.

2. DEXIA's policy to boost agricultural trade is aiming mainly at the extra-regional markets – the U.K. and France (through sales made to Guadeloupe). Although there is no specific list of products, an expectancy on the actually exported products exists (limes, oranges, bananas, plantains, dasheen, ginger, christophenes, etc.).

DEXIA's willingness to identify and inform of marketing opportunities have to be based on a better (more efficient) market prospect and identification.

A support to specific exporters (to be identified) is also envisioned, mainly to improve their presence in the extra-regional market. Hucksters are considered to be informal exporters, consequently they will not be considered for this assistance.

There are some commercial activities where DEXIA will try to get involved, like providing processing and packing services for the formal exporters. This same areas (to be confirmed) would also be used as wholesale market points.

DEXIA is aiming to become one of the main suppliers of exportable products, as well as the centralizer of the export business by providing packaging material, negotiating freights, and establishing the minimum export grades.

The involvement of DEXIA in the commercial activities of the trade business could create a serious conflict of interests with the aimed regulatory role.

D. STATISTICAL APPENDIXES

Table B-1

- Gross Domestic Product by Economical Activity at Factor Cost in Constant Prices (EC\$ Million) for Years 1977 to 1989
- Gross Domestic Product by Economical Activity at Factor Cost in Current Prices (EC\$ Million) for Years 1977 to 1989

Source: Dominica Statistical Department/OECS/EAS

Table B-2-a

- Agricultural and Agro-based Production in Dominica (M.T.) for years 1977 to 1989

Source: Records of Agri.Stats.Unit & Central Statistics Office

Table B-2-b

- Exports of Fresh Produce from Dominica: 1981-1989 (value in kgs.)

Source: FAO 1981-1986; Ministry of Finance 1987-1988

Graphic B-1

- Main Crops Exports (1977-1988)
- Food Imports (1980-1989)
- Capital Investment in Agriculture (1980-1989)
- Total Imports to Dominica (1989-1989)
- Public Sector Investment in Agriculture (1989-1988)

- Retail Prices of Farm Produce (1984-1989)
- Domestic Exports from Dominica (1975-1988)

Source: Central Statistical Office of Dominica

Tables B-2-c

- Exports of Fresh Produce by Destination (values in T.M. and (000) of EC\$) 1980-1989
- Regional and Extra-Regional Exports from Dominica for Major Crops (in T.M.) for 1977-1989

Source: Central Statistical Office of Dominica

TABLE B-1
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY
COMMONWEALTH OF DOMINICA

COMMONWEALTH OF DOMINICA

GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
IN CONSTANT PRICES (EC\$ MILLION)

	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Agriculture	31.93	35.51	24.16	23.66	28.92	29.59	29.84	31.47	30.68	36.50	38.34	40.65	35.45
Crops	27.04	30.57	19.97	17.02	20.82	21.55	21.57	22.86	21.25	26.88	28.46	30.45	25.20
Livestock	1.12	1.12	1.31	1.61	2.14	2.32	2.51	2.39	3.32	3.47	3.59	3.70	3.81
Forestry	1.41	1.41	1.68	1.67	2.54	2.60	2.60	2.65	2.20	2.13	2.17	2.21	2.25
Fishing	2.36	2.41	1.20	3.34	3.42	3.12	3.16	3.57	3.93	4.00	4.12	4.27	4.17
Mining & Quarrying	1.04	1.06	0.72	0.72	0.74	0.80	0.79	1.00	0.97	0.92	1.12	1.38	1.28
Manufacturing	4.24	5.85	4.85	6.20	7.30	8.57	8.74	7.87	8.90	9.28	9.83	10.83	12.06
Electricity & Water	1.80	1.92	1.65	1.67	1.81	1.83	1.78	2.12	2.27	2.40	2.57	2.74	2.94
Construction	5.43	5.41	6.64	11.90	10.08	8.75	8.26	11.64	10.37	8.75	9.86	12.88	12.00
Wholesale & Retail Trade	9.81	11.58	8.05	11.46	12.00	12.05	11.82	11.70	13.06	14.37	16.00	17.28	17.13
Hotels & Restaurants	1.15	1.33	0.97	0.90	0.87	0.76	1.10	1.13	1.07	1.23	1.35	1.56	1.56
Transport	4.34	4.65	4.21	4.46	3.74	4.20	5.77	6.06	6.75	7.46	7.87	8.62	8.40
Road Transport	3.43	3.59	3.51	3.60	2.74	3.26	4.66	4.80	5.54	6.07	6.33	6.84	6.65
Sea Transport	0.68	0.80	0.49	0.66	0.81	0.81	0.88	1.01	0.97	1.11	1.27	1.44	1.43
Air Transport	0.23	0.26	0.21	0.20	0.19	0.21	0.23	0.25	0.24	0.26	0.27	0.34	0.32
Communications	1.09	1.27	1.28	1.40	1.74	1.76	2.13	2.23	2.47	2.75	3.80	4.18	4.56
Banks & Insurance	3.81	4.74	5.23	5.64	5.77	5.80	5.83	5.95	6.25	6.44	6.76	7.34	7.82
Real Estate & Housing	4.90	5.02	3.81	5.52	5.62	5.71	5.82	5.88	5.94	6.01	6.13	6.31	6.50
Government Services	16.86	17.26	20.28	21.07	21.93	22.59	22.93	23.39	23.97	24.21	24.82	25.56	25.87
Other Services	1.08	1.09	0.95	1.09	1.10	1.17	1.19	1.21	1.23	1.27	1.31	1.36	1.44
Less Imputed Service Charge	2.64	3.29	3.63	3.50	3.58	3.61	3.63	3.78	3.97	4.07	4.29	5.26	5.52
TOTAL	84.84	95.40	79.19	92.21	98.12	100.45	102.57	100.15	107.98	117.50	125.49	135.43	133.49
GROWTH RATE		12.45	-16.99	16.44	6.41	2.37	2.11	5.44	1.69	6.84	6.80	7.92	-1.43

SOURCE: Dominica Statistical Dept./ OECS/EAS
(1987 Data Provisional)
May 1990

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TABLE B-1 (continued)

DOMINICA

**GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
IN CURRENT PRICES (1000 MILLION)**

	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Agriculture	31.93	41.44	34.78	44.05	48.49	49.78	52.51	56.89	62.39	76.64	82.59	95.90	91.87
Crops	27.04	36.09	29.94	36.71	38.79	38.96	40.67	43.41	48.88	63.63	68.76	81.41	76.77
Livestock	1.12	1.30	1.64	2.36	3.16	3.69	4.32	4.35	4.70	5.03	5.46	5.74	6.21
Forestry	1.41	1.41	1.70	1.99	3.56	4.09	4.09	4.29	3.24	2.29	2.38	2.46	2.46
Fishing	2.36	2.64	1.50	3.08	2.99	3.15	3.51	4.34	5.57	5.78	5.99	6.29	6.19
Mining & Quarrying	1.04	1.14	0.92	1.17	1.39	1.49	1.33	1.59	1.46	1.38	1.76	2.57	2.38
Manufacturing	4.24	5.98	5.02	6.93	10.33	13.39	14.12	12.35	14.37	16.08	18.25	20.97	24.51
Electricity & Water	1.80	2.51	1.92	3.47	4.89	5.00	5.23	5.92	6.24	6.68	7.39	8.77	9.75
Construction	5.43	5.34	7.71	10.48	14.56	13.67	12.59	12.17	15.09	11.82	14.42	21.05	17.61
Wholesale & Retail Trade	9.81	12.91	8.12	13.16	13.77	13.79	14.12	14.18	21.08	25.89	30.24	33.21	39.09
Hotels & Restaurants	1.15	1.41	1.00	1.22	1.31	1.56	1.85	2.21	2.62	3.05	3.81	4.77	5.18
Transport	4.34	4.97	6.10	9.09	8.23	10.11	15.07	17.64	19.94	23.59	26.40	30.11	39.74
Road Transport	3.43	3.87	4.46	6.08	5.24	6.51	9.68	10.37	12.18	14.47	15.94	18.17	17.74
Sea Transport	0.68	0.84	1.27	2.64	2.57	3.07	4.64	6.07	6.29	7.41	8.63	9.79	9.78
Air Transport	0.23	0.28	0.35	0.28	0.42	0.51	0.71	1.24	1.47	1.62	1.83	2.15	2.92
Communications	1.07	1.35	1.37	1.47	3.14	4.59	7.23	8.80	9.40	10.85	15.36	17.41	22.32
Banks & Insurance	3.81	5.08	5.87	8.97	7.22	9.68	11.73	16.70	18.33	19.83	22.05	28.56	30.31
Real Estate & Housing	4.90	6.52	4.95	7.18	8.05	8.61	9.13	9.41	9.71	10.18	10.99	11.54	12.66
Government Services	16.86	19.26	31.27	33.74	35.41	37.05	49.67	47.05	59.12	56.36	57.63	57.52	66.14
Other Services	1.08	1.17	1.21	1.67	1.91	2.18	2.31	2.49	2.47	2.66	2.91	3.48	3.63
Less Imputed Service Charge	2.64	3.17	4.94	6.76	7.29	7.23	7.53	10.05	9.87	10.36	12.05	15.39	17.15
TOTAL	84.84	105.93	105.80	143.74	152.91	163.60	169.42	212.69	223.28	253.27	281.76	324.29	339.79
GROWTH RATE	N.A.	24.86	-0.12	35.86	6.38	6.99	10.28	12.34	10.16	13.43	11.25	15.07	4.84

SOURCE: Dominica Statistical Dept./ OECS/EAS
(1987 Data Provisional)
May 1990

TABLE B-2-a
AGRICULTURAL AND AGRO-BASED PRODUCTION IN DOMINICA

AGRICULTURAL & AGRO-BASED PRODUCTION IN DOMINICA

1977 - 1989

VOLUME IN TONNES

ITEM/YEAR	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
TOTAL AGRI+AGRO	99781	134089	82199	74550	97457	102183	103297	106727	113323	153533	150719	135135	166456
TRADITIONAL	65227	87049	44129	32970	55341	56872	57333	60894	65964	102912	103202	135266	115606
BANANA	36357	53182	24381	13716	35252	35423	38013	41177	42656	62741	67725	72824	58259
BAY LEAF	23	29	22	32	7	18	18	20	21	24	30	21	18
COCOA	671	778	428	428	428	492	473	480	498	531	474	569	570
COCONUT	4014	3333	3380	1042	865	1277	3395	3198	3193	2669	2820	22220	21938
COFFEE	254	297	171	164	166	171	362	410	419	95	474	595	590
GRAPEFRUIT	9578	12155	7293	7700	8360	8986	5388	5557	8250	23735	19023	21179	19568
LIME	8503	10313	3827	6183	6380	6513	6076	6258	6357	5834	5569	5870	4802
ORANGE	3084	3927	2356	2356	2403	2427	2213	2284	2750	5123	5000	5771	4616
ORTANOUE													
PLANTAIN	2743	3035	2271	1344	1478	1565	1393	1530	1820	2160	2122	6217	5595
TANGEFINE													
NON-TRADITIONAL	621	694	346	402	425	436	497	1894	4287	4551	4335	6197	6414
AVOCADO	180	203	101	152	157	160	193	231	209	230	263	358	803
BARRADIN													
BREADFRUIT	195	201	121	101	111	112	112	114	117	171	191	173	495
CAPAMBOLA													
CINNAMON	6	8	9	4	4	6	8	10	11	15	13	13	14
CLOVE													
CUT FLOWERS		9	6	7	8	10	12	22	27	27	44	26	31
GUAVA													
MANGO	231	263	105	132	139	144	159	1514	3920	4055	3924	4374	4068
NUTMEG	9	10	4	6	6	4	3	3	3	3	3	3	3
PASSIONFRUIT												1250	1000
PATCHOULI													
PAWPAW													
PINEAPPLE													
SORPEL													
SOUPSOP													
SUGAR APPLE													

SOURCE : RECORDS OF AGRI-STATS-UNIT, & CENTRAL STATISTICS OFFICE

TABLE B-2-a (continued)

AGRICULTURAL & AGRO-BASED PRODUCTION IN DOMINICA

1977 - 1989													VOLUME IN TONNES	
ITEM/YEAR	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	
ROOTS & TUBERS	24326	32434	24574	28045	26867	26897	26653	27398	24614	27970	25167	26727	28632	
CASSAVA	975	1049	734	763	774	777	777	856	875	844	844			
SASHEEN	12970	16910	12576	12650	12870	12962	13014	13351	12100	13596	11124	14106	17887	
IRISH POTATO									75	45	62	73	150	
SWEET POTATO	1306	1703	1559	1760	1725	1609	1604	1632	1664	1971	1792	1732	1287	
TANNIA	5936	7305	6294	7920	6218	6199	6241	6420	4400	4914	5645	4516	3838	
YAM	3089	4967	3411	4950	5280	5350	5027	5139	5500	6600	5700	6300	5670	
VEGETABLES	4521	4515	4434	5219	5557	5654	4831	5051	5360	5709	4392	2641	2293	
BEET														
CABBAGE	894	1045	936	1098	1142	1079	1001	1019	1109	1244	944	944	530	
CANTELOUPE														
CARROT	399	520	466	547	569	529	491	499	510	569	465	419	398	
CAULIFLOWER														
CHRISTOPHEME	61	72	62	46	52	55	64	155	112	166	126	128	205	
CORN														
CUCUMBER	2235	1792	1899	2279	2509	2623	1994	2026	2074	2074	1880			
EGGPLANT	3	4	3	3	3	3	3	3	3	3	3	3	3	
GINGER	121	139	132	146	151	156	178	199	204	216	203			
HOT PEPPER														
LETTUCE	279	314	333	366	384	399	405	415	392	168	128	128	128	
OKRA	5	6	4	6	7	3	3	3	3	3	3	3	3	
PEAS/BEANS	75	90	99	89	93	95	97	100	102	119	90	90	79	
PUMPKIN	351	403	427	493	517	538	479	463	672	903	685	747	597	
SPINACH														
TOMATO	93	130	133	147	160	174	166	169	179	242	184	184	174	
WATERMELON											279	195	166	

SOURCE : RECORDS OF AGRI-STATS-UNIT, & CENTRAL STATISTICS OFFICE

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TABLE B-2-a (continued)

AGRICULTURAL & AGRO-BASED PRODUCTION IN DOMINICA

1977 - 1989

VOLUME IN TONNES

ITEM/YEAR	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
MEAT/FISH/DAIRY	515	541	529	637	857	1211	1476	1705	2182	1872	2110	2188	0
FISH						185	210	301	480	162	421	477	
POULTRY MEAT	34	37	35	32	38	53	53	83	80	84	83		
BEEF	159	159	163	164	265	349	357	418	439	439	423	464	
PORK	153	161	164	191	227	268	359	370	321	400	420	602	
MUTTON	50	53	53	53	55	56	99	192	113	119	125	76	
EGGS	70	75	57	139	215	237	261	139	338	382	362	325	
MILK	49	56	57	58	57	63	138	287	301	286	271	244	
AGRO-PROCESSED	4571	8855	8126	7279	8380	11113	12457	9785	10916	10519	10913	11916	13321
EDIBLE OIL	525	640	415	117	84	626	678	729	118	275	79	477	571
CRUDE C'NUT OIL	1146	1650	1785	510	489	1072	1698	1614	1657	1454	1443	1315	1357
COPRA		2666	2704	834	692	1648	2716	2584	2555	2135	2180	1844	1946
COCONUT MEAL	822	772	867	211	219	472	795	789	764	663	640	546	584
LAUNDRY SOAP	1497	2486	1898	4341	4950	5220	4853	2424	3838	3377	4396	5280	6500
TOILET SOAP	381	641	457	1266	1946	2074	1713	1645	1984	2115	2175	2454	2363
G/FRUIT CONC.													
JUICE CONC.													
PA/FRUIT CONC.													
HOT SAUCES													
LUMBER			449	463	1030	615	1658	1647	1087	830			

Lumber is in thousands of board feet & is not included in the grand total.

SOURCE : RECORDS OF AGRICULTURAL STATISTICS UNIT, & CENTRAL STATISTICS OFFICE

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TABLE B-2-b
EXPORTS OF FRESH PRODUCE FROM DOMINICA, 1961-1989

EXPORTS OF FRESH PRODUCE FROM DOMINICA: 1981 - 1989

(values in kilograms)

EM	1981	1982	1983	1984	1985	1986	1987	1988	1989
OTHER ALLIACIOUS VEG	2,952	425	287	535	1,762	2,613	1,638	2,355	11,835
POTATOES	0	27	67	36	277	3,670	2,246	27	18
BRASSAGE	50	115	164	408	146	123	41	23	120
ROOTS	0	0	0	145	0	132	9	0	0
SPINACH	62,163	105,685	131,480	113,814	87,965	112,483	72,133	84,647	126,324
MUSHROOMS	0	0	280	294	690	10,364	4,905	7,881	2,490
OTHER VEGETABLES	63,376	69,170	112,048	121,601	76,246	1,731	2,024	344	265
CHRISTOPHERNE	0	0	0	0	0	58,396	51,693	46,504	45,770
CABBAGE	186,680	173,709	331,058	412,935	260,505	281,540	291,383	369,489	550,761
BEET POTATO	2,639	2,815	7,722	10,185	5,252	10,966	3,615	3,494	4,203
CAULIFLOWER	139,289	123,071	173,904	226,458	170,050	150,805	101,365	66,301	80,827
ONIONS	27,120	39,182	70,441	90,718	62,971	92,675	63,072	52,776	55,446
OTHER ROOTS	0	269	1,553	0	45	3,613	4,694	3,306	4,001
GINGER	0	0	0	0	0	8,256	9,725	11,473	33,082
CORRELL	0	0	0	0	0	267	243	315	120
LEMON ORANGE	0	349,197	526,092	513,469	635,056	787,216	643,427	219,179	104,946
MANDARIN	309	3,186	4,028	4,126	3,531	3,767	3,619	5,678	6,379
LIME	259,910	206,767	190,557	245,213	240,063	203,123	167,831	87,216	117,389
OTHER CITRUS	0	0	75	0	0	0	68	2,206	0
GRAPEFRUIT	1,524,490	2,652,658	2,483,634	2,345,455	2,386,976	2,330,996	2,358,213	1,266,174	1,577,619
BANANA	27,322,440	27,478,321	29,305,034	32,632,184	33,865,890	52,788,908	63,682,997	72,284,237	51,320,018
MELON	223,522	310,281	501,771	622,267	1,645,160	845,638	1,195,606	1,032,067	1,247,782
COCONUT	96,330	84,901	38,769	7,640	9,928	23,524	94,721	224,897	124,648
PINEAPPLE	165	190	142	136	432	1,094	217	1,924	459
AVOCADO	28,761	28,042	67,095	90,255	68,225	134,187	138,464	106,671	187,967
MANGO	25,879	98,136	77,176	154,336	177,885	112,053	105,550	81,174	52,271
OTHER FRESH FRUIT	4,921	1,771	21,468	32,252	21,553	530	1,370	851	759
GUAVA	0	0	0	133	0	54	55	32	0
PASSIONFRUIT	0	0	0	0	0	8,339	4,838	5,763	8,048
BREADFRUIT	0	0	0	0	0	22,635	23,816	38,731	23,791
WATERMELON	0	0	0	0	0	28,832	20,494	10,184	38,258
PAPAW	0	0	0	0	0	1,685	2,020	2,795	5,892
SOURSOP	0	0	0	0	0	36	0	0	23
ANTHURIUM LILLIES	7,568	9,685	11,092	10,390	12,360	19,809	22,407	41,050	41,895
TOTAL:	29,978,564	31,737,603	34,055,937	37,634,985	39,732,968	58,050,060	69,074,499	76,059,764	55,773,406
% BANANAS:	91.14%	86.58%	86.05%	86.71%	85.23%	90.94%	92.19%	95.04%	92.02%
% NON-BANANAS:	8.86%	13.42%	13.95%	13.29%	14.77%	9.06%	7.81%	4.96%	7.98%

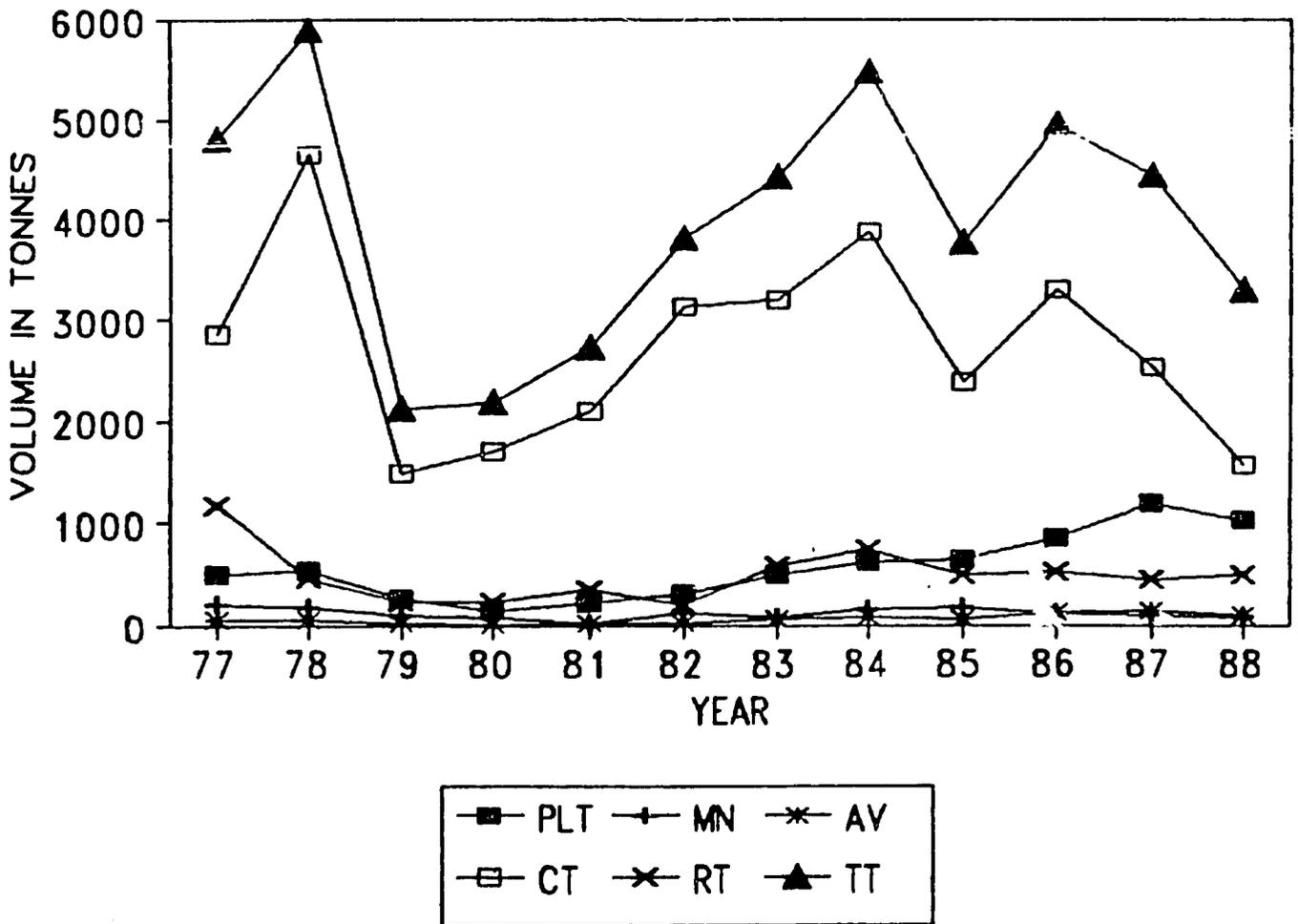
SOURCE: FAO 1981-1986; MINISTRY OF FINANCE 1987-88.

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GRAPHICS B-1

MAIN CROP EXPORTS (1977 - 1988)

Plantain, Mango, Avocado, Citrus, Root

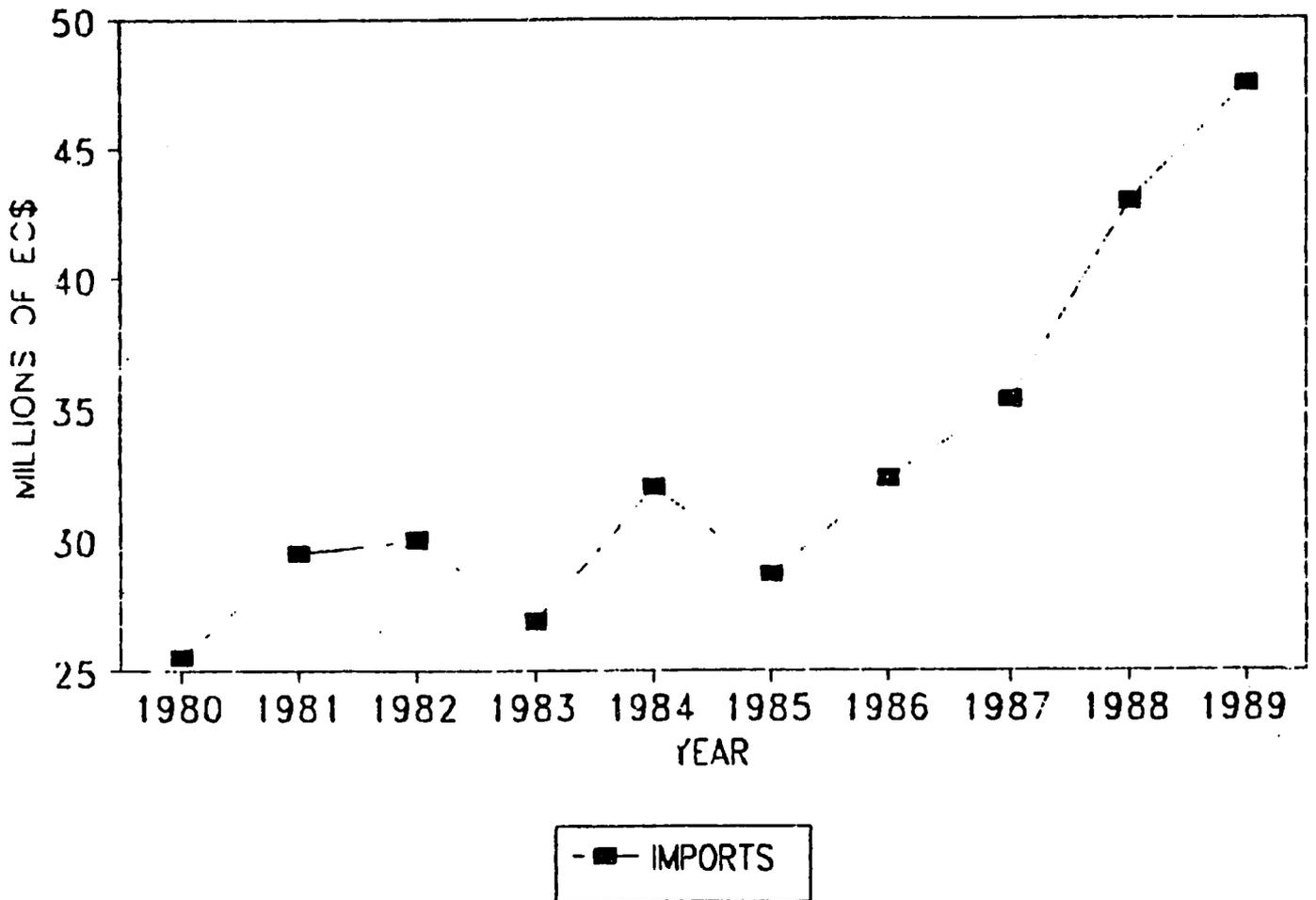


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GRAPHICS B-1 (continued)

FOOD IMPORTS (1980 - 1989)

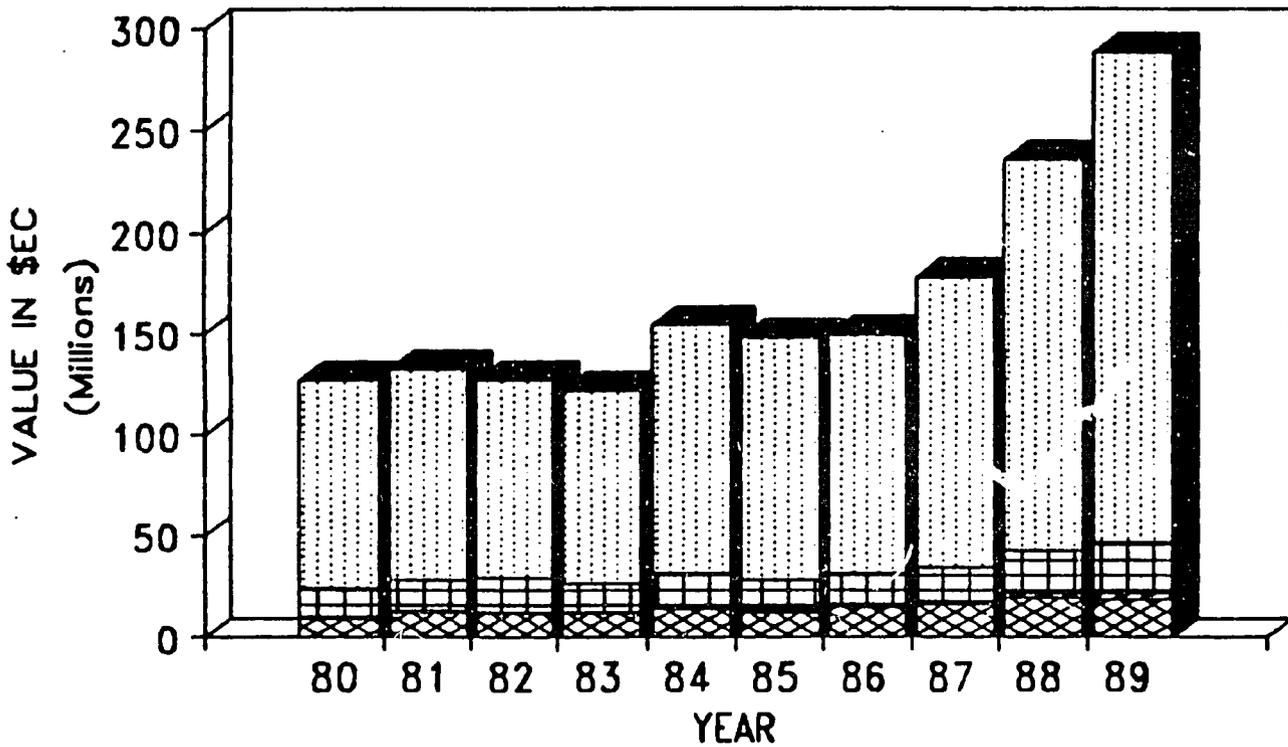
CONSTANT PRICES



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GRAPHICS B-1 (continued)

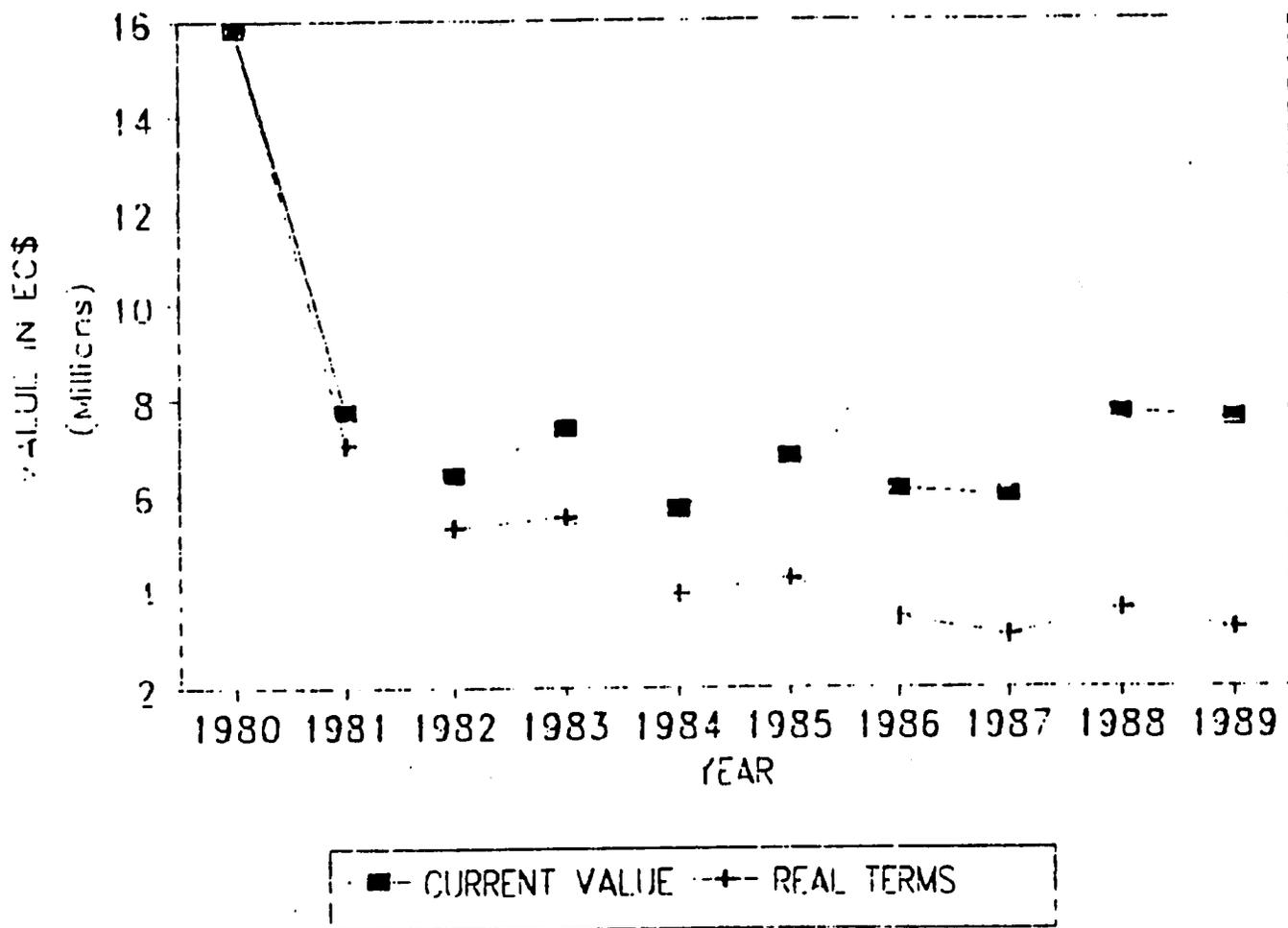
TOTAL IMPORTS TO DOMINICA 1980 - 1989



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GRAPHICS B-1 (continued)

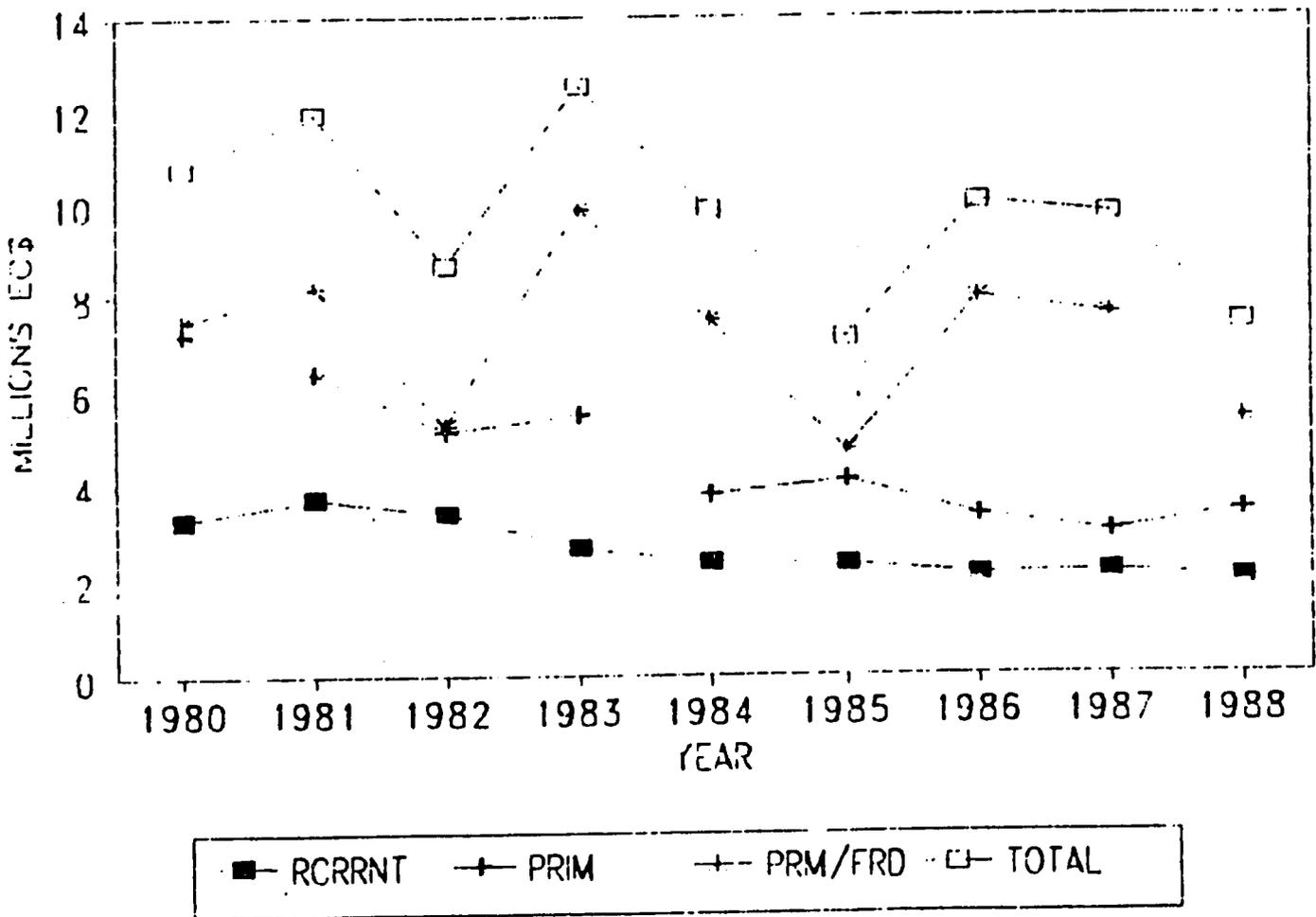
CAPITAL INVESTMENT IN AGRICULTURE 1980 TO 1989 -- BASE YEAR 1980



Based on 10³'s Annual Price Deflator

GRAPHICS B-1 (continued)

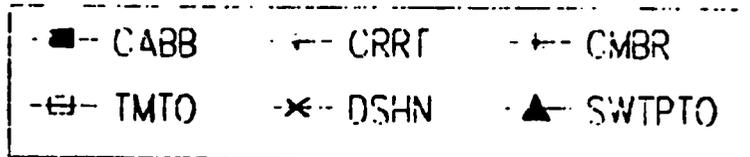
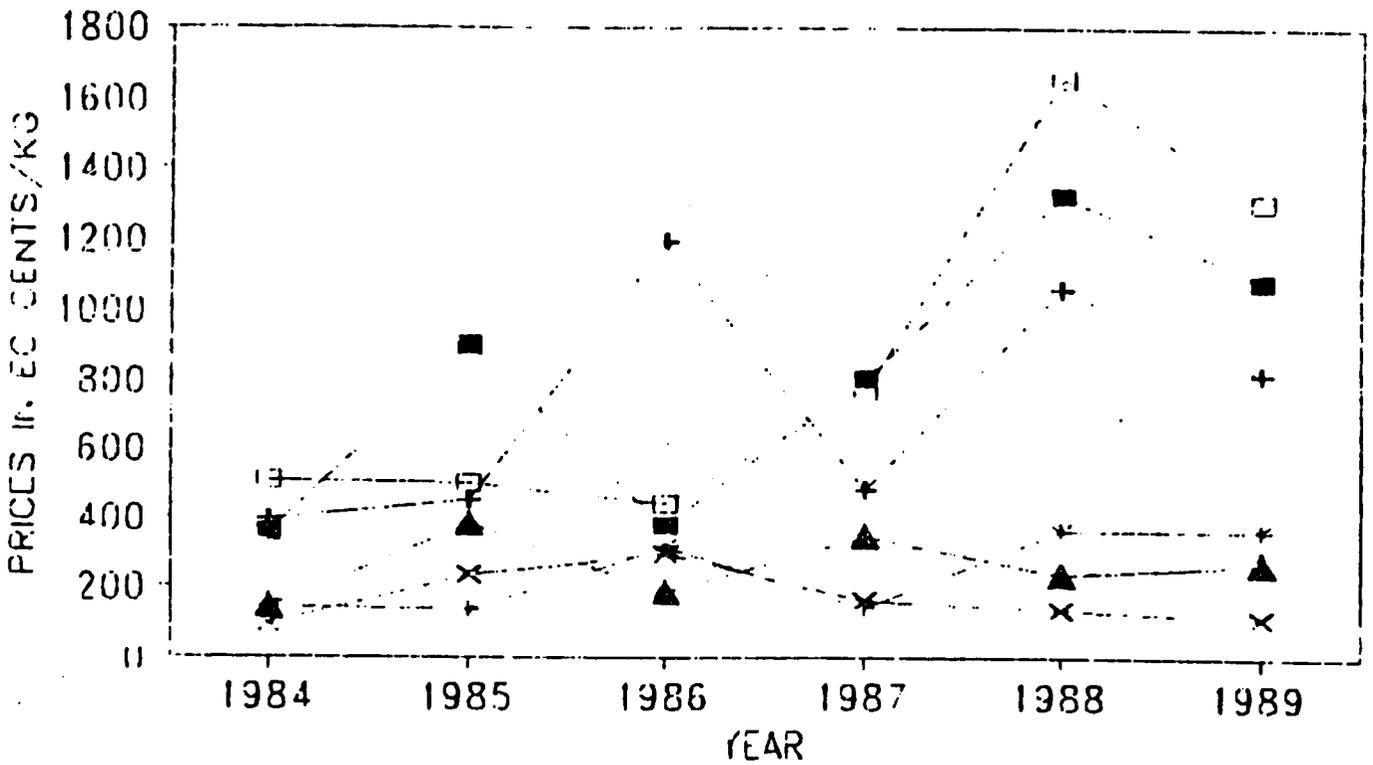
PUBLIC SECTOR INVEST IN AGRICULTURE
IN CONSTANT PRICES (1980 - 1988)



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GRAPHICS B-1 (continued)

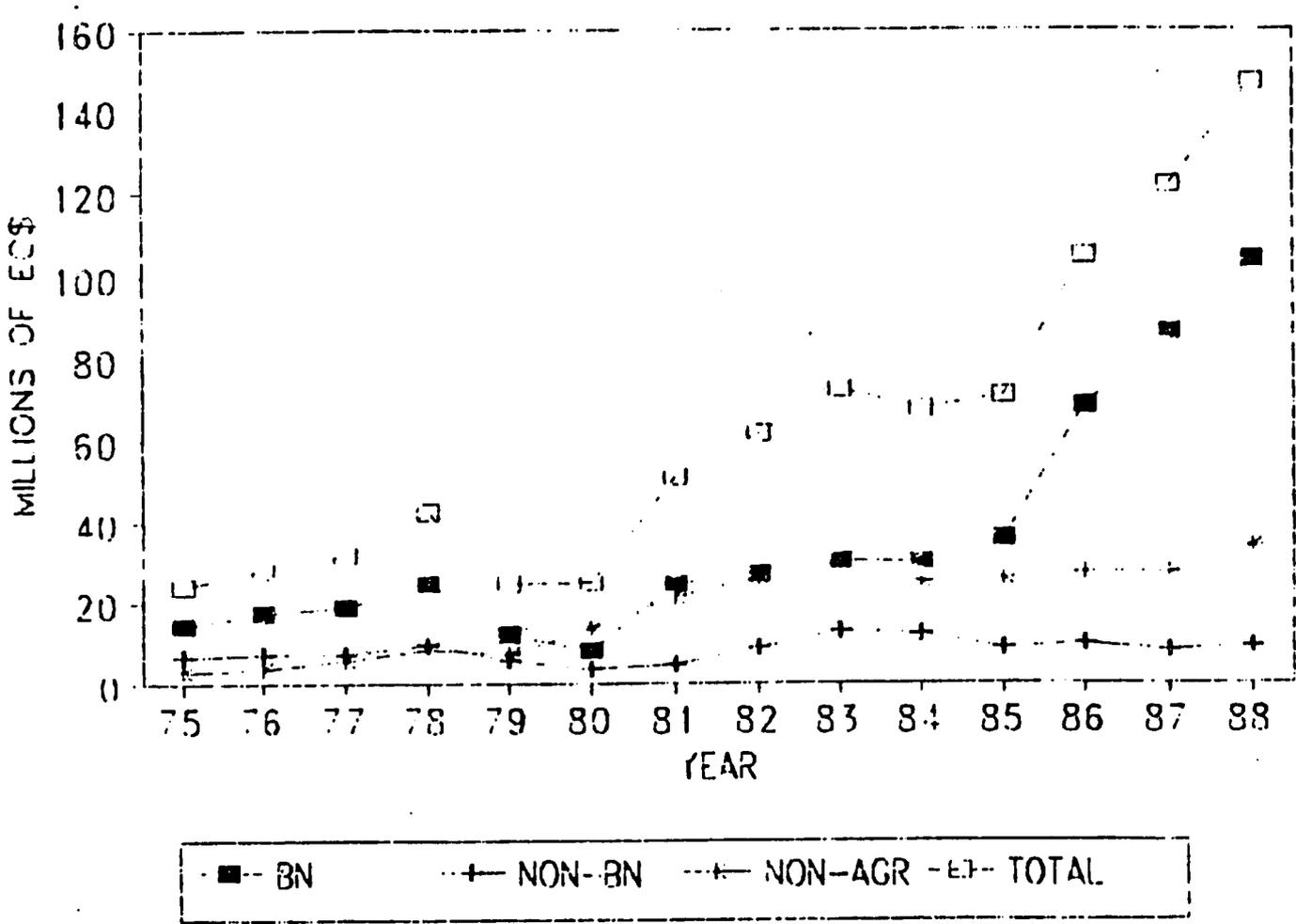
RETAIL PRICES OF FARM PRODUCE
 PRICES IN EC CENTS/KG (1984 - 1989)



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GRAPHICS B-1 (continued)

DOMESTIC EXPORTS FROM DOMINICA 1975 - 1988



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TABLE B-2-c
EXPORTS OF FRESH PRODUCE BY DESTINATION &
REGIONAL AND EXTRA-REGIONAL EXPORTS FROM DOMINICA FOR MAJOR
CROPS

EXPORTS OF FRESH PRODUCE BY DESTINATION (Division 15 of the S.I.T.C.)

Quantity, in tonnes.

A quantity of 1 represents less than 0.5 tonnes

Values in E.C.U. dollars with 000's omitted.

A value of 1 represents less than 500 dollars

CROP	YEAR	FRENCH WEST INDIES		REST OF REGION		UNITED KINGDOM		U.S.V.I		TOTAL	
		QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE
SWEETENED	1981	9	5	401	272	7820	7727	31	15	9121	7977
	1982	22	17	337	191	26944	24271	11	6	27314	24911
	1983	32	19	269	153	27167	26776	9	5	27577	27191
	1984	84	45	351	191	26742	26991	31	17	27211	27227
	1985	126	77	591	327	31300	26614	79	22	32072	27178
	1986	79	47	407	479	33167	35202	42	45	33646	33646
	1987	19	12	351	242	49787	64722	151	129	50701	47722
	1988	27	12	311	527	62412	67722	6	31	63422	64722
	1989	19	12	412	527	57247	59277	52	11	57814	57722
	1990	22	12	661	554	33722	62422	27	31	34212	47722
SWEET PEEL CITRUS	1981	1	1	1	1	1	1	1	1	1	1
	1982	1	1	1	1	1	1	1	1	1	1
	1983	1	1	1	1	1	1	1	1	1	1
	1984	1	1	1	1	1	1	1	1	1	1
	1985	3	1	1	1	1	1	1	1	1	1
	1986	1	1	1	1	1	1	1	1	1	1
	1987	1	1	1	1	1	1	1	1	1	1
	1988	1	1	1	1	1	1	1	1	1	1
	1989	1	1	1	1	1	1	1	1	1	1
	1990	1	1	1	1	1	1	1	1	1	1
ORANGEFRUIT	1981	732	142	147	12	212	212	11	1	1777	1777
	1982	622	127	147	22	272	277	1	1	1522	1522
	1983	212	72	127	72	1224	1227	1	1	2277	2277
	1984	1222	227	212	127	272	277	11	1	2422	2422
	1985	1222	227	272	127	272	277	12	1	2722	2722
	1986	1422	227	272	127	272	277	12	1	2722	2722
	1987	1222	227	272	127	272	277	12	1	2722	2722
	1988	222	227	142	127	272	277	12	1	1222	1222
	1989	222	227	142	127	272	277	12	1	1222	1222
	1990	222	227	142	127	272	277	12	1	1222	1222
LIME	1981	122	22	122	122	27	27	1	1	247	247
	1982	222	122	12	1	22	22	1	1	242	242
	1983	172	122	6	1	22	22	1	1	242	242
	1984	122	122	27	27	1	1	1	1	122	122
	1985	122	122	22	22	12	12	1	1	242	242
	1986	122	122	22	22	1	1	1	1	242	242
	1987	17	12	122	22	22	22	22	1	122	122
	1988	22	22	22	22	1	1	1	1	22	22
	1989	22	22	22	22	1	1	1	1	22	22
	1990	22	22	22	22	1	1	1	1	22	22

TABLE 2-C (continued)

EXPORTS OF FRESH PRODUCE BY DESTINATION (Division 05 of the S.I.T.C.)

Quantity in tonnes.

Values in E.C. dollars with 000's omitted.

A quantity of (1) represents less than 0.5 tonnes

A value of (1) represents less than 500 dollars

CPOF	YEAR	FRENCH WEST INDIES		REST OF REGION		UNITED KINGDOM		U.S.V.I		TOTAL	
		QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE
MANGO	1980	4	3	40	27	3	2	3	2	50	34
	1981	9	6	8	9	4	3	5	3	26	21
	1982	30	19	56	37	4	6	9	6	99	65
	1983	23	15	23	16	19	8	11	8	76	52
	1984	52	35	25	49	2	9	14	9	154	103
	1985	27	16	135	91	7	7	10	7	179	121
	1986	14	9	91	62	1	5	6	5	112	77
	1987	17	11	68	46	77	1	1	1	122	83
	1988	3	5	60	33	13	21	11	11	91	134
	1989	7	9	46	55	3	3	0	0	(1)	64
DABNEEN	1980	61	65	31	35	0	0	0	0	92	104
	1981	57	65	44	51	1	1	96	103	191	213
	1982	60	69	41	47	1	1	73	84	174	199
	1983	196	225	57	51	5	5	85	97	343	379
	1984	268	306	59	68	3	4	82	92	412	470
	1985	149	223	43	64	4	5	65	99	261	391
	1986	109	142	71	93	5	6	91	116	276	359
	1987	135	215	49	77	20	28	87	136	290	456
	1988	135	270	150	211	33	39	111	155	357	487
	1989	274	394	144	214	122	168	61	101	525	727
TANNIA	1980	20	51	32	82	2	4	2	6	56	154
	1981	55	150	51	141	32	87	1	4	139	382
	1982	66	174	50	137	6	17	1	3	123	33
	1983	110	301	58	160	2	6	4	10	174	477
	1984	147	388	77	212	2	5	5	13	227	612
	1985	82	191	83	193	1	2	3	8	162	394
	1986	41	91	104	246	1	1	6	14	152	359
	1987	23	112	64	189	3	7	5	12	99	320
	1988	20	41	44	94	1	2	4	9	66	137
	1989	27	58	52	115	2	5	1	2	82	179
SWEET POTATO	1980	3	4	(1)	(1)	(1)	(1)	(1)	(1)	3	4
	1981	2	5	(1)	(1)	(1)	(1)	(1)	1	2	6
	1982	3	5	(1)	(1)	0	0	(1)	(1)	3	5
	1983	5	10	1	1	0	0	2	3	6	14
	1984	7	13	2	4	0	0	1	2	10	19
	1985	3	6	2	3	(1)	(1)	(1)	1	5	10
	1986	2	3	4	8	(1)	1	4	9	10	21
	1987	2	4	1	3	0	0	0	1	4	8
	1988	(1)	1	2	3	(1)	(1)	(1)	(1)	(1)	(1)
	1989	1	2	3	4	(1)	(1)	(1)	(1)	4	7

TABLE 2-C (continued)

EXPORTS OF FRESH PRODUCE BY DESTINATION (Division 05 of the S.I.T.C.)

Quantity, in tonnes.

A quantity of (1) represents less than 0.5 tonnes

Values in E.C. dollars with 000's omitted.

A value of (1) represents less than 500 dollars

CROP	YEAR	FRENCH WEST INDIES		REST OF REGION		UNITED KINGDOM		U.S.A.		TOTAL	
		QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE
YAMS	1980	6	15	3	9	(1)	(1)	(1)	(1)	9	24
	1981	20	58	4	11	1	2	2	5	27	76
	1982	27	78	8	23	(1)	(1)	4	10	42	111
	1983	47	134	3	12	1	3	12	34	63	183
	1984	65	205	12	39	2	7	11	33	93	264
	1985	35	82	16	36	1	3	11	24	63	145
	1986	20	44	45	88	2	5	24	51	92	199
	1987	18	53	42	80	2	5	14	36	62	177
	1988	10	14	42	90	1	2	11	21	33	114
	1989	19	52	41	109	2	5	8	23	61	169
PUMPKINS	1980	36	44	24	32	22	27	22	27	104	130
	1981	22	31	19	26	21	30	(1)	(1)	62	97
	1982	51	73	20	29	36	57	1	1	110	160
	1983	85	121	33	48	10	15	3	4	131	183
	1984	55	78	55	78	3	4	4	6	117	164
	1985	45	70	31	47	6	10	5	8	85	135
	1986	24	35	59	95	4	5	21	30	109	165
	1987	28	42	33	50	3	4	8	11	72	104
	1988	34	45	47	53	4	4	14	13	85	102
	1989	60	77	57	72	9	10	2	2	127	161
AVOCADO	1980	1	1	5	5	0	0	0	0	6	6
	1981	18	20	9	10	(1)	(1)	2	2	29	30
	1982	15	17	12	13	(1)	(1)	(1)	(1)	28	31
	1983	44	48	17	19	5	5	3	3	67	73
	1984	36	66	39	85	3	4	10	21	90	198
	1985	21	33	39	60	4	5	2	3	69	104
	1986	34	44	66	92	5	6	9	13	124	179
	1987	20	30	115	185	20	28	3	1	137	227
	1988	6	11	94	154	6	9	(1)	(1)	107	174
	1989	15	21	175	232	0	0	2	3	177	254
ORANGE (SWEET)	1980	92	59	41	26	2	6	2	6	134	85
	1981	220	142	86	56	32	87	1	4	308	199
	1982	200	133	145	95	6	17	1	3	349	231
	1983	350	228	159	102	2	6	4	10	518	336
	1984	296	191	204	131	2	5	5	13	512	337
	1985	475	270	171	112	1	2	3	8	613	395
	1986	561	362	184	120	1	1	6	14	735	488
	1987	561	332	113	73	3	7	5	12	638	408
	1988	155	277	63	103	1	2	1	1	219	363
	1989	199	186	133	135	(1)	(1)	1	1	333	322

TABLE 2-C (continued)

EXPORTS OF FRESH PRODUCE BY DESTINATION (Division 05 of the S.I.T.C.)

Quantity in tonnes.

A quantity of 0 represents less than 0.5 tonnes

Values in E.C. dollars with 000's omitted.

A value of 0 represents less than 500 dollars

CROP	YEAR	FRENCH WEST INDIES		REST OF REGION		UNITED KINGDOM		U.S.V.I		TOTAL	
		QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE	QUANTITY	VALUE
PLANTAIN	1980	3	4	128	194	4	6	5	6	140	219
	1981	20	30	169	259	30	47	5	3	204	349
	1982	36	52	229	355	40	59	5	8	310	474
	1983	169	257	292	448	25	35	15	23	501	763
	1984	251	378	347	533	12	18	12	18	622	947
	1985	111	171	523	696	3	4	8	13	645	884
	1986	80	120	741	1136	6	9	19	25	846	1293
	1987	174	540	916	212	64	56	13	11	1168	1420
	1988	69	95	807	1046	156	174	11	14	1032	1335
	1989	85	92	859	939	312	215	16	19	1267	1245
TOTAL ANNUAL FRESH PRODUCE EXPORTS	1980	767	502	1078	589	8700	8 07	64	50	10407	10000
	1981	1347	939	898	870	27737	25265	121	134	30093	27166
	1982	1635	1120	1019	971	28806	28410	113	123	31873	27624
	1983	2562	1958	1285	1178	29735	31181	190	211	33773	34553
	1984	2781	2337	1816	1694	32541	30647	449	594	37667	35268
	1985	2594	1616	1184	2416	33748	35567	165	220	38550	27751
	1986	2414	1481	2895	3261	50700	65540	344	427	58254	73029
	1987	921	1532	2772	2359	64307	66135	156	258	66694	91007
	1988	1517	1856	1970	2104	60005	90075	287	357	76185	103100
	1989	1877	1757	2958	3055	44429	61517	195	217	56184	73378
TOTAL ANNUAL FRESH PRODUCE EXPORTS (EXCLUDING BANANAS) i.e. NON-BANANA	1980	754	497	656	606	678	680	34	42	2322	2025
	1981	1325	926	545	639	793	862	110	128	2793	2558
	1982	1603	1101	750	821	1639	1674	104	112	4396	3718
	1983	2476	1939	935	982	950	1190	159	194	4563	4305
	1984	2653	2260	1230	1367	761	1031	411	572	5055	5230
	1985	2556	1576	561	1337	605	665	123	175	4684	4785
	1986	2395	1462	2029	2412	515	615	214	298	7462	8206
	1987	834	1530	1862	1812	1639	337	150	222	3066	4430
	1988	1498	1837	1342	2307	446	567	212	291	3901	5455
	1989	1804	1733	1704	2501	675	821	138	178	4860	6029

NB: 1297 tonnes (8 2.4c) Bananas exported to Italy, in 1981
 4382 tonnes (8 13.2c) Bananas exported to Italy, in 1982
 6953 tonnes (8 6.6c) Bananas exported to Italy, in 1983
 Totals at the bottom of the page (destination totals) include quantities & values for other crops not listed in the table.
 Totals at the side of the page (crop totals) include quantities & values for other destinations not listed in the table.

Also exported in significant volumes are coconuts, christophenes, watermelons and breadfruit.

Export to Rest of Region include Caricom plus Netherlands Antilles, B.V.I., Puerto Rico and Curacao.

TABLE 2-C (continued)

REGIONAL & EXTRA-REGIONAL EXPORTS FROM DOMINICA FOR MAJOR CROPS

		1977 - 1982			VOLUME IN TONNES		
ITEMS	DESTINATION	1977	1978	1979	1980	1981	1982
BANANA	REGIONAL	525.21	894.34	485.57	459.57	376.31	561.92
	OTHER	29,937.17	36,114.58	15,473.09	7,621.69	26,944.13	27,167.41
	TOTAL	30,462.38	37,015.92	15,958.66	8,081.26	27,320.44	27,729.33
PLANTAIN	REGIONAL	475.10	526.89	272.83	135.90	193.96	879.17
	OTHER	20.26	14.21	0.47	4.20	29.56	40.11
	TOTAL	495.36	541.10	273.30	140.10	223.52	919.28
MANGO	REGIONAL	196.59	142.87	97.70	62.47	21.64	122.89
	OTHER	11.94	9.26	6.82	0.97	3.24	6.77
	TOTAL	208.53	152.13	104.52	63.44	24.88	129.66
MUSKDEW	REGIONAL	59.17	61.17	18.63	1.11	29.47	27.11
	OTHER	1.10	0.97	0.93	0.31	0.93	0.52
	TOTAL	60.27	62.14	19.56	1.42	30.40	27.63
GRAPEFRUIT	REGIONAL	791.44	944.50	771.51	576.31	949.37	1,175.97
	OTHER	1,311.37	2,577.26	274.00	321.77	676.12	1,525.49
	TOTAL	2,102.81	3,521.76	1,045.51	898.08	1,625.49	2,701.46
LIME	REGIONAL	291.19	417.59	740.21	174.24	270.56	182.67
	OTHER	12.12	23.79	0.87	24.79	29.32	25.79
	TOTAL	303.31	441.38	741.08	199.03	299.88	208.46
ORANGE	REGIONAL	451.42	723.59	145.51	157.53	327.24	349.11
	OTHER	9.29	0.84	0.22	1.15	0.91	0.00
	TOTAL	460.71	724.43	145.73	158.68	328.15	349.11
TANGEPINE	REGIONAL	5.58	7.82	1.79	1.11	0.31	3.47
	OTHER	0.00	0.02	0.00	0.00	0.00	0.00
	TOTAL	5.58	7.84	1.79	1.11	0.31	3.47
TOTAL	REGIONAL	1,527.63	2,025.51	1,259.00	819.49	1,319.52	1,710.47
	OTHER	1,322.77	2,560.51	277.11	645.69	705.35	1,551.29
	TOTAL	2,850.40	4,586.02	1,536.11	1,465.18	2,024.87	3,261.76

SOURCE : CENTRAL STATISTICS OFFICE

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TABLE 2-C (continued)

REGIONAL & EXTRA-REGIONAL EXPORTS FROM DOMINICA FOR MAJOR CROPS

ITEMS	DESTINATION	1977 - 1982					
		VOLUME IN TONNES					
		1977	1978	1979	1980	1981	1982
YAM	REGIONAL	33.97	54.87	19.97	14.00	26.37	42.87
	OTHER	58.70	71.85	0.24	0.07	0.78	8.09
	TOTAL	92.67	126.72	20.21	14.07	27.15	50.96
TANNIA	REGIONAL	154.12	164.43	69.09	82.65	107.85	149.64
	OTHER	76.76	17.50	46.77	0.72	31.45	6.00
	TOTAL	230.88	181.93	115.86	83.37	139.30	155.64
CASHEEN	REGIONAL	199.75	211.41	100.53	135.41	191.64	173.49
	OTHER	17.80	1.96	0.05	0.09	0.05	0.05
	TOTAL	217.55	213.37	100.58	135.50	191.69	173.54
SWEET POTATO	REGIONAL	17.87	10.87	5.40	7.21	2.59	2.87
	OTHER	0.00	0.00	0.00	0.07	0.05	0.00
	TOTAL	17.87	10.87	5.40	7.28	2.64	2.87
ROOT CROP	REGIONAL	405.77	441.07	195.03	278.47	329.43	369.09
	OTHER	152.40	27.73	46.66	0.55	32.33	6.74
	TOTAL	558.17	468.80	241.69	279.02	361.76	375.83
GRAND TOTAL	REGIONAL	3,199.56	4,173.73	2,318.96	1,799.09	2,377.56	3,401.14
	OTHER	31,755.91	38,730.92	15,764.17	3,478.03	27,715.79	28,770.01
	TOTAL	34,955.47	42,904.65	18,083.13	10,267.12	30,093.35	32,171.15

SOURCE : CENTRAL STATISTICS OFFICE

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TABLE 2-C (continued)

REGIONAL & EXTRA-REGIONAL EXPORTS FROM DOMINICA FOR MAJOR CROPS.

ITEMS	DESTINATION	1963 - 1969						
		1963	1964	1965	1966	1967	1968	1969
PEPPERS	REGIONAL	696.95	751.64	700.66	1,000.67	1,067.40	646.59	893.19
	OTHER	29,302.76	31,330.35	37,167.23	51,780.27	60,417.59	71,677.36	50,404.61
	TOTAL	29,999.71	32,082.19	37,868.89	52,781.94	61,484.99	72,323.95	51,297.80
PLANTAIN	REGIONAL	476.70	610.12	642.19	879.49	1,131.09	876.40	928.87
	OTHER	25.10	10.09	2.98	6.16	64.51	157.64	319.40
	TOTAL	501.80	620.21	645.17	885.65	1,195.60	1,034.04	1,248.27
MANGO	REGIONAL	57.80	152.08	171.06	111.00	65.45	60.45	51.90
	OTHER	19.50	2.06	6.81	0.95	37.10	10.57	0.37
	TOTAL	77.30	154.14	177.87	111.95	102.55	71.02	52.27
AVOCADO	REGIONAL	60.10	78.77	60.51	177.42	138.10	101.54	191.49
	OTHER	5.00	11.88	5.72	3.25	1.20	6.13	0.00
	TOTAL	65.10	90.65	66.23	180.67	139.30	107.67	191.49
GRAPEFRUIT	REGIONAL	1,562.40	1,610.34	1,614.95	1,914.34	1,716.25	1,027.13	1,180.33
	OTHER	931.20	775.46	570.03	493.01	11.24	239.05	357.69
	TOTAL	2,493.60	2,385.80	2,184.98	2,407.35	1,727.49	1,266.18	1,538.02
LIME	REGIONAL	183.40	231.35	234.50	196.54	105.57	78.37	111.77
	OTHER	7.20	13.37	4.58	5.49	40.30	9.86	6.79
	TOTAL	190.60	244.72	239.08	202.03	145.87	88.23	118.56
ORANGE	REGIONAL	526.10	513.40	640.44	787.00	640.76	221.24	332.40
	OTHER	0.00	0.00	0.00	0.11	0.75	0.99	0.19
	TOTAL	526.10	513.40	640.44	787.11	641.51	222.23	332.59
TANGEPINE	REGIONAL	4.00	4.13	3.53	3.79	3.62	2.38	6.46
	OTHER	0.00	0.00	0.00	0.00	0.00	3.30	0.00
	TOTAL	4.00	4.13	3.53	3.79	3.62	5.68	6.46
CITRUS TOTAL	REGIONAL	2,275.90	2,359.27	2,693.49	2,903.97	2,499.16	1,250.10	1,630.63
	OTHER	923.40	786.97	576.61	493.71	54.71	250.19	402.07
	TOTAL	3,199.30	3,146.24	3,270.10	3,397.68	2,553.87	1,500.29	2,032.70

SOURCE : CENTRAL STATISTICS OFFICE

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TABLE 2-C (continued)

REGIONAL & EXTRA-REGIONAL EXPORTS FROM DOMINICA FOR MAJOR CROPS

ITEMS	DESTINATION	1987 - 1989						
		VOLUME IN TONNES						
		1987	1988	1989	1990	1991	1992	1993
YAM	REGIONAL	69.49	88.26	59.46	91.34	61.82	51.67	55.27
	OTHER	0.98	0.25	1.27	2.74	0.21	1.15	0.26
	TOTAL	70.47	88.51	60.71	94.08	62.03	52.82	55.53
TANNIA	REGIONAL	171.79	224.73	169.00	150.12	98.79	64.70	78.09
	OTHER	2.11	1.74	1.05	1.67	2.59	1.61	2.75
	TOTAL	173.90	226.47	170.05	151.79	101.38	66.31	80.84
DASHEEN	REGIONAL	325.71	409.85	254.93	274.89	271.74	375.51	479.50
	OTHER	4.74	7.49	3.59	4.45	19.64	33.69	122.57
	TOTAL	330.45	417.34	258.52	279.34	291.38	409.20	602.07
SWEET POTATO	REGIONAL	7.77	10.18	8.09	11.24	3.51	3.11	3.14
	OTHER	0.00	0.00	0.26	0.71	0.17	0.34	1.04
	TOTAL	7.77	10.18	8.35	11.95	3.68	3.45	4.18
ROOT CROP	REGIONAL	574.72	732.42	490.40	525.44	474.69	450.98	575.94
	OTHER	7.89	8.48	4.12	10.72	24.56	37.09	124.61
	TOTAL	582.61	740.90	494.52	536.16	499.25	488.07	700.55
GRAND TOTAL	REGIONAL	3,055.77	4,694.71	4,762.70	5,415.83	5,326.19	3,479.57	4,071.32
	OTHER	29,734.41	30,660.97	32,761.47	52,399.57	62,798.09	72,100.96	51,276.99
	TOTAL	32,790.18	35,355.68	37,524.17	57,815.40	68,124.28	75,580.53	55,348.31

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TECHNICAL ANNEX C

GRENADA

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**TECHNICAL ANNEX C
COUNTRY: GRENADA**

A. DESCRIPTION OF ISLAND'S AGRICULTURE

Agricultural production is concentrated in the most fertile northern and central regions of the island. Average production units are small, ranging from 3 to 10 acres. There are few bigger production areas. Grenada's agricultural production is dominated by traditional products like nutmeg, bananas, cocoa, and spices (i.e., clove, cinnamon, bay leaves, etc.). There is new emphasis on fruits trees which are scattered all over the island, such as mangoes, grapefruits, soursop, avocados, suga apples, etc, and also on root crops. These are products that always have been around, but their export potential was only seen recently. (Tables C-1-a and C-1-b).

The support from the government to the agricultural sector is indicated to be giving way for tourism. The number of loans granted by the Grenada Development Bank (GDB) to the tourist industry accounts for less than 15 percent of the total loans but approximately for 45 percent of the total value, this contrasts with agriculture that account for 50 percent of loans but only for 19 percent of the value.

1. Area: 120 square miles

2. Population and percent in agriculture

The total population of Grenada is estimated at over 110,000 inhabitants, most of them live around the two main cities of St. George (the capital) and Grenville. It is considered that the population involved in agriculture is significant, but official data is not available. The high number of nutmeg and cocoa producers contribute significantly to the population involved in agriculture; 7,000 members in the Nutmeg Association and 6,200 in the Cocoa Cooperative. It is important to note that some farmers are members of both associations.

3. Main agricultural production and exports

During 1990, "government services" was the main contributor to the GDP with 21.1 percent; agriculture contributed, in second place, 16.9 percent of which 14.2 percent is the contribution of the "crops" subsector. This is the lowest contribution of the agricultural sector since 1980, which has ranged from 24.8 percent (in 1981) to 18.6 percent (1989). This reduction is a result of a decrease in the contribution of livestock and crops subsectors (Table C-2).

a. Regional Trade

The regional trade of agricultural products is losing importance in Grenada, this is caused by the shut-down of trade with Trinidad, because off the latter's economical problems. Imports from CARICOM countries accounted for 22.8 percent of total imports for Jan.-Sept. 1990. Exports in the regional market for the same period at export value were:

• OECS	7.5%
• other CARICOM	16.0%
• other Caribbean	0.2
• TOTAL	23.7%

b. Foreign Trade

Extra-regional trade is the most important for Grenada. Exports to the EEC accounted for 59 percent of total exports during Jan.-Sept. 1990. The balance is divided among North, Central and South America plus other nonspecified countries (Table C-3-a).

The trade balance for Grenada was negative by EC\$ 165.6 million for the period of Jan.-Sept. 1990. Extra-regional imports accounted for 74.8 percent of total imports, of which EEC sold 21.7 percent, North America (U.S.A and Canada) 34.1 percent, Japan 7.4 percent, Central and South America 3.7 percent (Table C-3-b).

The percentage distribution per item of the total value of exports for the Jan.-Sept 1990 period is as follows:

• Nutmeg	35.4%
• Bananas	19.7%
• Cocoa	16.0%
• Clothing	8.0%
• Toilet Paper	5.9%
• Mace	5.8%
• Fresh Fruits	3.8%
• Flour	2.8%
• others	2.6%

Details of the quantity and value of exports per product and country of destination can be seen in Table C-4.

B. ORGANIZATION AND STRUCTURE OF THE MARKETING BOARD

Current Operations:

The MNIB was reorganized during 1979. The government's goal was to control imports of basic commodities that were then under total control of private importers. MNIB currently has the monopoly of bulk imports of basic commodities. These basic commodities are: sugar, rice and powder milk. Imports of these basic commodities packed in small containers are actually permitted and carried out by the private sector under "light control" of the licensing authority of the Ministry of Trade.

MNIB is also authorized to "buy and handle" all agricultural products of Grenada except cocoa, banana and nutmeg. The government can grant the monopoly of any other product to MNIB by declaring it a "specified product". The Board operates under two divisions; the Agricultural or Procurement Division, in charge of purchasing and exporting the agricultural products of Grenada, and the Importing Division, in charge of imports of basic commodities.

Domestic Procurement and Exports:

The Marketing Board has established, as a common practice, to contract with farmers in order to assure the marketing of their production. The Agricultural Division operates daily procuring and packing for exports.

Among the services that MNIB provides to farmers, we can indicate the following:

- Mainly collects the purchased products at the farm, but also has three collection centers, strategically distributed to gather the farmers' production, and then take it to MNIB's facilities for washing, grading and packing.
- Contracts with a team of harvesters to pick fruit from the farmers. By doing this it aims at a security of supply and better quality. This applies to mango, golden apple and bread fruit harvests.
- Services are provided for "special projects":
 - procures planting material, i.e., ginger, hot pepper, etc., directly imported by MNIB from Dominica,
 - guarantees loans with GDB,
 - guarantees a minimum purchasing price,
 - grants monetary bonuses on quality and supply,
 - offers farmers training and seminars for quality and handling of agricultural products.

The modality used by MNIB to pay farmers is guaranteeing recovery of loans by the GDB. MNIB sends payments through the GDB where deduction of owed money is made. This

condition previously stipulated facilitates the granting of loans, specially to farmers that have little to no collateral security. Farmers realize that MNIB is useful and necessary to obtain loans from GDB but also because of the market security.

Prices paid by MNIB are reported to be somewhat lower than those paid by other exporters. This is evidenced mainly by bigger producers.

The list of products that is actually being handled for exports by MNIB is very long, and as broad farmers' production. Their list of products consists of:

Fruits: plums, star apples, coconuts, coconut jelly, mangoes, grapefruits, pineapples, sapodillas, sugar cane, oranges, sour sop, guavas, watermelons, papayas, limes, carambolas, avocados, bread fruit.

Root crops: sweet potatoes, dasheens, yams, tannias.

Vegetables plus some root crops are mainly for the domestic market, such as tomatoes, cabbages, lettuces, root crops.

Other: ginger, bread nuts-young, turmeric, hot pepper, pumpkin, plantain, cinnamon, christophine, french cashew.

The Agricultural Division of MNIB is directing its efforts to favor the producing sector by increasing their export operations. This contrasts with the private sector efforts, indicated to be more directed to import fresh products and other type of agricultural processed products in detriment of domestic production.

Government officials see with good eyes these efforts, and consider that MNIB is "a young organization", somewhat efficient in its operations, but needs to continue learning how the international market operates, mainly on packaging, quality and presentation of its products.

The purchase of agricultural products for exports during agricultural year 1989-90 (Oct.-Sept.) represents a 157 percent and a 158 percent increase in quantity and price, respectively, over the previous year. Purchases increased from 477,710 lbs. to 1.23 million lbs. and from a value of EC\$ 177,327 to EC\$ 457,788.

MNIB's policy is not to compete with traffickers, who are active in regional markets. This leads the Board to operate mainly with the United Kingdom, the United States, and Canada. Nevertheless, there are indications that MNIB is exporting to the regional market.

MNIB's officials indicate that their wholesales of agricultural products are made to hotels, restaurants and supermarkets for domestic consumption, and to traffickers for exports to the regional market (mainly Trinidad).

Imports:

Imports of basic commodities are made according to consumption patterns already established in the country and "identified" by MNIB. The distribution of these imported basic commodities is mainly done through wholesales to supermarkets and stores. Retail

sales of these products by MNIB are made only with products that suffered damages of their packaging material, forcing new packing in smaller volumes.

The Central Government controls selling prices of MNIB's imports. A maximum markup by the Board is set for each of the basic commodities; sugar and rice have a 2.5 percent markup and powdered milk 5 percent. The distribution margins for wholesale and retail are 5 percent and 15 percent, respectively.

1. The number and name of the enabling legislation setting up the board are:

Grenada Act No. 40 of 1973. It can be cited as the **Marketing Board Act, 1973.** An amendment to this Act was made by the People's Law No. 69 of 1979, and can be cited as the **Marketing Board (Amendment) Law, 1979.** This amendment gave the Board the new responsibility of importing and changed its name from Marketing Board to **Marketing and National Importing Board (MNIB).** The controlling authority also was changed from the "Governor" to the Minister of Finance, Trade and Planning. The other main amendment concerns the power granted to the Minister to declare, by order, any "foodstuff, building material, agricultural equipment or any other commodity whatsoever to be a specified import .." in order to grant the monopoly to MNIB from the date stated by the order.

2. Since 1979, MNIB is under the responsibility of the Ministry of Finance, Trade and Planning.
3. The Board consists of 9 (nine) members nominated by the Minister of Finance, Trade and Planning for a period of 2 (two) years. The members represent: the Ministry of Agriculture by 1 (one) member, Producers Farmers Union, 1 (one), Ministry of Trade, 1 (one), National Commercial Bank, 1 (one), Agro-processing industry 1 (one), Chamber of Commerce and Industry 1 (one), Private Sector (agriculture) 2 (two), National Farmers Association 1 (one).
4. The duties of MNIB as stipulated by the Act are:

"(a) to buy the specified produce of Grenada and to re-sell the same;

(b) to improve, by such means as it shall from time to time determine, processing and marketing of produce for the benefit of producers,

(c) to secure the most favorable arrangement for the purchasing, handling, storage, exportation, shipping and marketing of all produce and, in particular, to assist agricultural and fishery co-operative societies to dispose of their produce to the best advantage;

(d) upon being required by the Minister (of Finance, Trade and Planning) so to do, to make recommendations on any matter directly or indirectly relating to or affecting any specified produce and;

(e) to import specified imports and to sell the same in Grenada".

Among the powers granted to the Board we can cite the following:

- "(a) buy produce other than specified produce and re-sell the same; provided that this shall not apply to produce the marketing of which is under the control of any other statutory body;**
- (b) establish and operate depots and agencies for the purchase, delivery, grading and sale of specified and other produce;**
- (c) enter into contracts for the purchase and sale of produce upon such terms and conditions as it may deem fit;**
- (d) enter into contracts for the transport of any specified or other produce or of such other commodities as may facilitate the operations of producers;**
- (e) establish itinerant systems for the purchase of produce;**
- (f) establish and operate mills and other plants for preparing and processing any produce;**
- (g) establish and operate cold storage or any other form of storage for produce;**
- (h) regulate the grading of specified and other produce, prescribe the grades which shall be used in the purchase of the produce and the prices to be paid to producers for each grade;**
- (i) act as commission agents for the disposal of the produce of any producers or co-operative society;**
- (j) trade and deal in feeding stuffs for livestock, seeds, fertilizers, insecticides and such other commodities as may facilitate the operations of producers;**
- (k) purchase, transport, store, insure, handle and sell any packing material, in such quantities at such prices and at such times as the Board may from time to time determine;**
- (l) make initial payments and pay dividends under such conditions and at such rates as may be decided by the Board on the basis of the quantities, types and grades of produce purchased by the Board;**
- (m) deduct from the gross proceeds of sale of all produce sold by it-**
 - (i) a percentage commission to be fixed by the Board with the approval of the Minister in respect of each type of produce; and**
 - (ii) allowances to meet the actual cost of direct working expenses, inland transport, ocean freight, dock charges, overseas agents' commission and insurance; and**
- (n) sell by wholesale and retail in Grenada."**

MNIB is also granted the power, with the approval of the Minister of Finance, Trade and Planning, to make rules on:

- "(a) prescribing the grades and types of specified produce it shall accept from producers;**
- (b) prescribing the prices to be paid to producers in respect of any grade, type or quality of specified produce;**
- (c) providing for the examination and grading of specified produce;**
- (d) providing for the control of prices at which specified produce may be sold for export by licensed exporting agents;**
- (e) regulating the quantities of specified produce which may be exported by licensed exporting agents;**
- (f) providing for the registration of producers of any specified produce;**
- (g) prescribing forms of licenses; and**
- (h) generally for carrying out the purposes of this Act."**

5. The infrastructure owned and maintained by the board consists of:

- Building with offices, fresh and processed ag-products retail facility (small warehouse area).**
- Pack-house,**
- 5 (five) cold rooms (5),**
- 2 (two) refrigerated trucks,**
- 7 (seven) trucks (2.5 tons),**
- 1 (one) van for deliveries to hotels,**
- 2 (two) jeeps for field officers,**
- 1 (one) forklift,**
- 3 (three) collection centers of fresh products.**

6. The main source of income of MNIB is generated by the imports of sugar, full cream powdered milk and rice. These operations subsidize and finance the activities of the Agricultural Division. No subsidies nor preferential tax treatments from the Central Government are indicated, but MNIB is exempted by law of income tax payments.

7. The medium-term prospects of MNIB are intended to increase exports of non traditional products, mainly by establishing adequate facilities for gathering and marketing these products.

The long-term prospects aim to maximize exports by continuing to develop a better marketing system. This improved marketing system would have a direct influence in the promotion, planning and development of agricultural production.

The management of MNIB considers the establishment of a functional relation between the production and marketing activities as a very important long-term policy. This improved relation will include purchases for the domestic as well as for the export markets. MNIB will be involved directly in the development of agricultural products specifically for exports. The problem of continuous supply is expected to be solved, in order to establish reliable export markets.

MNIB has a special interest in developing ties with the small agro-industries of Grenada, by providing them with the needed fresh products and packaging material, and then, participating directly in the distribution and marketing of their finished products.

MNIB does not have any market intelligence prospects. These activities of market prospecting, intelligence and information are considered to be the total responsibility of the ADCU towards all the OECS members.

In general, the export activities of MNIB are carried inefficiently, but Government officials recognize that measures are taken to solve this. Sources within the private sector indicate that MNIB's inefficiency is mainly caused by its important overhead costs, estimated to be 50 percent of its total costs. This problem could be solved by passing MNIB's commercial operations to a private institution with less overhead costs. A detailed feasibility study to privatize the commercial operations should determine what is the direct influence of the overhead costs in MNIB's economic viability.

At present there is no other institution that is able to take over these commercial operations. It is not possible for PFU to take over more responsibilities than the ones it already has without. Besides the nutmeg, cocoa and bananas associations, the rest of fresh products exporters from the private sector are very weak, and tend to go out of business due to limited financial capabilities and as a result of the shut-down of the Trinidadian market (mainly for hucksters).

It is recommended that private exporters be organized in an association that provides its members with structural support and guarantees them financial and marketing services. Joint efforts between the private and public sectors have to be made to solve the current marketing constraints and bottlenecks: i.e., increase and guarantee space availability as well as better organize air transportation for the regional and extra-regional markets; solve the lack of infrastructure for marketing of fresh products at the airport, which is actually causing quality deterioration of shipments.

It would be necessary to establish clear responsibilities towards the producing sector, for the members of this association, particularly in market security for its products.

MNIB would be in charge of regulating and controlling grades, quality and prices paid to farmers, as well as providing support services to farmers and exporters.

MNIB's current experience and knowledge on marketing of agricultural products in Grenada is very valuable and should be used properly to advise and regulate the commercial operations if they are transferred to another institution.

Incomes generated by the imports of basic commodities could be directed to partially cover the costs of services provided by MNIB to farmers and exporters, a "cess" from the latter to the Board should also be considered as payment for services received.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

1. Public Sector

There is no indication of a public institution responsible of imports and exports of agricultural products.

2. Other Statutory Boards

There are three other Statutory Boards in Grenada controlling and regulating the production and marketing of the "traditional agricultural products for exports": the Grenada Co-operative Nutmeg Association, the Grenada Cocoa Association and the Grenada Banana Co-operative Society; each having the monopoly of nutmeg, cocoa and banana, respectively.

a. Grenada Co-operative Nutmeg Association

The Nutmeg Cooperative was first established during 1946, and its act was amended approximately 12 (twelve) times by 1984. Created to "safeguard and promote the interests of the nutmeg industry and in particular to market nutmeg and to regulate and control the export thereof".

Grenada participates in the world nutmeg market with 25 percent of the total supply. This market is largely dominated by Indonesia with 70 percent of the total supply and the remaining 5 percent is produced by the rest of the OECS members. The main markets for Grenadian nutmeg are in Europe and Latin America, being the most important Holland and Argentina.

The nutmeg production is considered the main crop of Grenada, its exports account for 33 percent of the Nation's foreign currency earnings and contributed with 26 percent of the GDP for 1990. The Nutmeg Association has 7,000 registered members, of which 95 percent are active. It directly employs 850 people.

The Board consists of 9 (nine) members, of which 6 (six) are elected among the farmers, and 3 (three) are appointed by the Minister of Agriculture, who oversees the general activities of the Association.

The Ministry of Agriculture is in charge of the propagation of planting material of specific varieties. No other extension service is indicated necessary for nutmeg production.

The Nutmeg Cooperative buys nutmeg at its 19 (nineteen) reception depots, strategically located in the production area. Three of these depots are used as main warehouses for the whole nut, which is shelled according to the orders placed. The kernel is graded, bagged and fumigated in 160 lb. bags.

The facilities owned by the Nutmeg Co-operative are entirely under-used, in particular the two main warehouse buildings at Lagoon Road. At present, one holds the Co-operative's office and the other is rented to the Ministry of Finance, Trade and Planning. The Cooperative's transportation vehicles are also under-used. There are eight trucks of an average 7 tons capacity, plus 6 other vehicles (three 4WD) mainly used to transport personnel.

The international prices of nutmeg have dropped by approximately 50 percent, due to the rupture of the Agreement with Indonesia on market shares (quotas) and minimum prices. As a result of this, Grenada's sales of nutmeg have been reduced by approximately 40 percent, creating a situation where the Co-operative has to buy the production to over build stocks.

The year 1992 is expected to be a difficult one for the nutmeg industry in Grenada. Competition in the international market will force tighter quality standards of the domestic production. That is to say that, quality will have to be upgraded significantly in order to compete favorably in a shrinking international market.

b. Grenada Cocoa Association (GCA)

The Cocoa Association was established to consolidate the functions and duties of the Grenada Cocoa Association and the Cocoa Project Management Board, "...to provide for the future regulation and control of the production, processing and marketing of cocoa and for the purposes incidental there to or connected with the foregoing purposes".

The Ministry of Agriculture oversees the Cocoa Association general activities.

The number of the act is Act No. 4 of 1989. It may be cited as "The Grenada Cocoa Association Act, 1989." The Cocoa Association has the monopoly over all cocoa produced in the territory and intended to be exported.

The Cocoa Board manages all the affairs of the Association. This Board is constituted by 9 (nine) members, of which 6 (six) are elected by the cocoa producers among its members, and 3 (three) appointed by the Minister of Agriculture. The current appointees represent the farming community 1 (one), the Agricultural Department (of the Ministry of Agriculture) 1 (one) and the Ministry of Finance 1 (one).

The Association is actually integrated by 6,200 active members, with an average production area of 2 acres.

GCA holds 20 buying points where farmers bring their production. Producers are encouraged to bring in cocoa in wet beans, to be fermented by the Association in its three centers for fermentation and drying, where grading and bagging is also carried out. These centers are located in the main production areas. These operations are controlled by the Association in order to maintain the quality of the cocoa bean to be exported.

Exports by destination are approximately as follows: over 33 percent to the U.S.A., 14 percent to Japan, 14 percent to the U.K., 10 percent to France and the balance to Switzerland and others.

The Cocoa Association is responsible of providing, to all its members, technical assistance in the techniques applied in crop management as well as in proper planting material. To provide this service GCA has its own extension service integrated by 17 people. The Association also provides planting material and inputs to its members.

The Central Government observes the Cocoa Association but does not interfere with its activities. GCA has been recipient of important international grants.

The financial situation and the future of the Association's viability are being questioned. This is mainly the result of the worsening of the international market and a reduction in international aid.

c. **Banana Society**

The banana Society was established as a Statutory Board by ordinance No. 57 of 1954. It can be cited as "The Banana Ordinance". It gives the Banana Society full control over the production and export of bananas, and like the other main Associations, the Banana society is also overseen by the Ministry of Agriculture of Grenada.

The Board consists of 9 (nine) members, of which 7 (seven) are elected among the growers, and 2 (two), or maximum 4 (four) are appointed by the Minister of Agriculture.

Banana production was established in Grenada mainly as a cash crop or intermediary of cash flow because of its year round production. This contrasts with seasonal fruits and crops, i.e., cocoa production, bread fruit, mango, etc. which produce approximately every six months. A return to cocoa and nutmeg is occurring in detriment of banana production. The current number of active members (600) continues to decrease, and contrasts with the almost 2,000 registered members of three to four years ago.

Banana production in Grenada takes place mainly in small, decapitalized and very inefficient farms. Only a "handful" are medium and large growers.

The market opportunities for 1992 are still uncertain for Grenada's banana industry. Some preferential mechanism is expected to maintain the preferential treatment for bananas originated in the ACP countries.

3. Other Private Sector

There are other private sector exporters, mainly traffickers who operate through barter deals with Trinidad mainly, but are not organized, and no information was available to the consultant, in order to identify products, volumes and destinations.

The Producers Farmers' Union is involved in export activities, trying to work with CATCO. It markets basically the same products that MNIB is marketing. The consultant did not meet with anybody from PFU.

In Grenada, several individuals have expressed interest in participating in exports of fresh agricultural products, but their lack of financial capacity and the lack of marketing services to support a new venture of this sort is holding them back.

Some of these people with valuable experience in export activities have been driven out of business by the loss of their shipments, caused by a total lack of support services to their activities.

In spite of recommendations made by different institutions to go into the export business, their financial standing does not allow them to risk it again unless these services are guaranteed, i.e., market information and market security; infrastructure at the airport to maintain quality of products until shipped; an agent-type person or institution to manage and verify complaints from purchasers and force due payments, etc..

D. DIVERSIFICATION POLICIES

1. The Agricultural Rehabilitation and Crop Diversification Project (ARCDP), under the responsibility of the Ministry of Agriculture and the World Bank is coming to its end. This Project was established for five years late in 1985. Its main objectives were to rehabilitate sugar cane, bananas, coconuts, coffee, vegetables and root crops.

The Project has three components:

- a. Credit line from CDB through the GDB,
- b. Institutional strengthening, that involved the Ministry of Agriculture, MNIB, Banana Society, PFU, and GDB.
- c. Infrastructure.- consisted on building farm roads, buildings for MNIB and Extension Office, jetty for schooners to transport agricultural products.

The Project supported farmers' production through plant propagation. Agricultural marketing has been supported with substantial efforts for infrastructure to MNIB, by

building cool storage, vehicles, packing line (located in a new building where MNIB will soon move). Farmers have also benefitted from efforts on technical assistance, through consultants to MNIB in ag-marketing and business administration.

A second phase of the Project is expected, with the main responsibility of coordinating development activities for all the sectors. Their functions would be directed to fulfill the lack of a Development Planning Office in the Central Government.

There are no specific production-related policies of new crops for exports. The general policy from the government (Ministries of Agriculture and Trade) is to encourage farmers to produce and to facilitate exports of already established crops like cut flowers (heliconia, ginger lilies, etc.), fruit-trees like mangoes, sapodillas, avocado, sugar and golden apples; vegetables like root crops (yams, tannias), ginger and hot peppers. These products are considered a complement to the traditional exportable products, nutmeg, cocoa and banana, that are experiencing a decrease in demand in the international market.

2. The marketing component of the above-mentioned diversification program is under the responsibility of MNIB. The improvement in quality of exportable products is considered a priority as currently these products do not meet market standards. The Ministry of Agriculture is training farmers in postharvest handling in order to correct this.
3. Government officials indicate that technical assistance in export activities, mainly to manufacturers, is available through the ECSEDA's personnel.

The Ministry of Finance, Trade and Planning is in charge of providing market information and market opportunities. No publication nor formal disclosure of the information received is, at present, available from this Ministry.

CATCO's role of distributing market information to the OECS members is expected to be accomplished, from now on, by ADCU. Sources indicate that the information available was used for CATCO's own interests instead of benefiting the OECS countries.

E. STATISTICAL APPENDICES

Table C-1-a

– Major Agricultural Crop Production
Source: Central Statistical Office

Table C-1-b

– Crop Production (1988-1990)
Source: Central Statistical Office

Table C-2

– GDP (Current Factor Cost) % Distribution

Source: Central Statistical Office

Table C-3-a

– Exports - Direction of Trade (Main Countries) (EC\$ 000)

Source: Central Statistical Office

Table C-3-b

– Imports - Direction of Trade (Main Countries) (EC\$ 000)

Source: Central Statistical Office

Table C-4

– Selected Domestic Exports by Country of Destination (EC\$ 000) 1989-1990

Source: Central Statistical Office

TABLE C-1-a
MAJOR AGRICULTURAL CROP PRODUCTION

MAJOR AGRICULTURAL CROP PRODUCTION

1986 - 1991

SERIES	1986	1987	1988	1989	1990	PROJ 1991	PERCENTAGE CHANGE				
							87/86	88/87	89/88	90/89	91/90
QUANTITY IN '000 LBS											
BANANAS	17908.3	18252.0	20594.4	19453.6	17455.0	18415.0	1.9	12.8	-5.5	-10.3	5.5
COCOA	3633.5	3952.6	3088.8	3213.7	4133.4	3918.5	8.8	-21.9	4.0	28.6	-5.2
NUTMEGS	5120.2	6168.7	6345.1	6762.3	5807.8	5587.1	20.5	2.9	6.6	-14.1	-3.8
MACA	512.1	691.0	732.0	743.7	537.7	521.6	34.8	5.8	1.5	-27.7	-3.0
VALUE IN \$'000 EC											
BANANAS	4864.4	6046.1	6827.1	6524.5	5700.0	6013.5	24.3	12.9	-4.4	-12.6	5.5
COCOA a/	5310.8	5970.2	4667.6	4704.8	5059.4	5555.2	12.4	-21.6	0.8	7.5	9.8
NUTMEGS a/	8629.0	12237.5	12625.9	19016.6	11543.0	8934.3	27.1	3.2	50.6	-39.3	-22.6
MACA a/	1444.6	2522.1	2674.6	3253.5	1670.5	1177.7	74.6	6.0	21.6	-48.7	-29.5
TOTAL	21248.8	26775.9	26795.2	33499.4	23972.9	21680.7	26.0	0.1	25.0	-28.4	-9.6

SOURCE: GCMA., GBC., & GCA.

a/ BASED ON ADVANCE PRICES PAID TO FARMERS

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TABLE C-1-b CROP PRODUCTION, 1988-1990

CROP PRODUCTION (1988-1990)
QUANTITY (000 lbs)

CROPS	1988	1989	1990	% CHANGE	
				1989/1988	1990/1989
AVOCADOS	3422.2	3520.1	3696.1	2.9	5.0
BLOGG	350.2	435.7	392.1	24.4	-10.0
BREADFRUIT	3080.6	3142.2	3205.0	2.0	2.0
CABBAGE	395.5	423.2	444.7	7.0	5.1
CARROTS	196.2	194.6	198.5	-0.8	2.0
CHIVE	7.5	7.5	7.6	0.0	1.3
COCONUTS (DRY)	540.4	553.9	565.0	2.5	2.0
CORN	556.1	563.8	569.4	1.4	1.0
CUCUMBERS	114.2	121.2	118.8	6.1	-2.0
DASHIKINS & BDDONS	1034.6	1042.7	1001.0	0.8	-4.0
GINGER	13.2	13.6	13.9	3.0	2.2
GRAPEFRUIT	3626.0	4210.8	4421.3	16.1	5.0
LETTYUCE	109.5	123.6	117.4	12.9	-5.0
LIMES	194.4	200.2	204.2	3.0	2.0
MANGOS	3214.8	3552.4	3879.1	12.7	7.1
ORANGES	1979.5	1863.1	1856.3	-5.9	5.0
PAN-PAN	340.2	350.4	357.4	3.0	2.0
PEAS & BEANS	1246.4	1358.4	1426.3	9.0	5.0
PEPPER (HOT)	1.4	1.5	1.5	7.1	0.0
PEPPER (SWEET)	32.6	33.1	33.8	1.5	2.1
PLANTAINS	1493.2	1467.3	1437.9	-1.7	-2.0
PUMPKIN	487.5	497.2	497.2	2.0	0.0
SAPONILLA	853.6	843.5	860.4	-1.2	2.0
SORREL	19.2	17.3	18.2	-9.9	5.2
SOURSOE	2499.9	2549.8	2677.3	2.0	5.0
SUGER APPLES	247.3	247.3	242.4	0.0	-2.0
SWEET POTATONS	508.2	561.2	572.4	10.4	2.0
TANNIAS	124.8	127.3	133.7	2.0	5.0
TOMATONS	89.7	96.5	101.3	7.6	5.0
YAMS	634.5	652.3	671.9	2.8	3.0
CLOVE	43.5	45.7	46.6	5.1	2.0
CINNAMON	10.5	11.0	11.6	4.8	5.5
BBET	32.5	34.1	34.1	4.9	0.0
EGGPLAET	9.9	9.0	9.0	-9.1	0.0
CHERRY	6.2	6.2	6.3	0.0	1.6
CALALO	91.3	93.1	93.2	2.0	0.1
CHRISTOPHERI	64.9	72.3	73.6	11.4	1.8
OCERO	3.2	3.2	3.3	0.0	3.1
LEMONS	839.8	856.6	873.7	2.0	2.0
GUAVA	86.1	87.0	87.2	1.0	0.2
GOLDEN APPLES	177.0	180.5	184.2	2.0	2.0
SUGAR CANE (tonne)	4.60	4.8	4.8	4.3	0.0

SOURCE: CENTRAL STATISTICAL OFFICE

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TABLE C-2
G.D.P. (CURRENT FACTOR COST)
% DISTRIBUTION

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G.D.P. (CURRENT FACTOR COST)
% DISTRIBUTION

SECTORS	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
AGRICULTURE	24.7	24.8	20.7	20.2	20.1	18.0	18.8	21.7	20.6	18.6	16.9
Crops	21.7	21.9	17.5	16.8	16.4	14.8	15.7	18.7	17.7	16.0	14.2
Livestock	1.1	1.2	1.1	1.1	1.0	1.0	0.9	0.9	0.9	0.8	0.8
Fishing	2.0	1.7	2.0	2.2	2.6	2.1	2.0	1.9	1.9	1.7	1.8
Forestry	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1
MINING & QUARRYING	0.3	0.3	0.3	0.3	0.2	0.3	0.4	0.4	0.3	0.4	0.4
ELECTRICITY & WATER	2.0	1.7	2.2	2.2	1.8	2.6	2.7	2.7	2.8	2.9	3.1
MANUFACTURING	3.9	4.8	5.2	5.1	4.4	5.1	4.7	5.0	5.3	5.3	5.4
CONSTRUCTION	6.7	9.6	10.3	8.5	8.2	7.9	8.3	8.8	9.7	10.2	10.5
WHOLESALE & RETAIL SALE	15.8	12.2	14.4	13.3	13.1	13.6	13.2	13.1	13.1	12.7	12.9
HOTEL & RESTAURANT	4.1	4.5	4.3	4.5	5.2	6.2	6.3	5.8	6.1	6.1	6.6
TRANSPORT & COMMUNICATION	12.8	12.4	12.9	13.4	13.5	12.8	13.7	13.3	14.0	13.9	14.3
BANKING & INSURANCE	4.5	5.3	5.3	5.1	5.3	5.6	5.3	5.1	5.0	4.7	4.7
REAL ESTATE & HOUSING	7.3	6.8	6.6	6.3	7.0	7.1	6.6	6.2	6.1	5.6	5.4
GOVERNMENT SERVICES	16.2	17.0	17.2	20.5	20.9	20.9	20.8	18.8	18.0	20.7	21.1
OTHER SERVICES	5.1	5.0	4.9	5.0	4.7	4.5	4.1	3.7	3.6	3.2	3.0
LESS IMPUTED SERVICE CHARGE	3.6	4.2	4.4	4.4	4.5	4.6	4.7	4.6	4.5	4.2	4.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCE: CENTRAL STATISTICS OFFICE

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TABLE C-3-a
EXPORTS - DIRECTION OF TRADE

(IN COUNTRIES) EC\$ '000

COUNTRY	1986	1987	1988	1989	JAN-SEPT 1990	% CHANGE		
						87/86	88/87	89/88
O. E. C. S.	669.0	2457.8	2050.6	4441.2	3265.8	267.4	16.0	55.8
DOMINICA	195.8	1490.5	1586.4	917.6	824.7	657.4	6.4	-42.2
ST. VINCENT	212.6	325.4	332.2	645.7	484.3	53.1	2.1	94.4
ST. LUCIA	82.1	345.1	742.3	2295.8	1550.8	320.3	115.1	209.3
ANTIGUA	108.5	119.5	21.0	67.1	169.1	10.1	-82.4	219.5
ST. KITTS	60.3	177.3	168.2	512.5	236.9	194.0	-5.1	204.7
MONTSERRAT	8.7	0	0.5	2.5	0	-100.0		400.0
OTHER CARICOM	17038.3	9096.6	16023.0	10609.1	7006.3	-46.6	-10.2	5.8
BARBADOS	781.1	1171.7	1286.6	1125.1	1734.6	50.0	9.8	-12.6
GUYANA	0.5	352.2	122.1	129.2	45.2	70340.0	-65.3	5.8
JAMAICA	30.2	0.1	964.3	547.1	347.3	-99.7	964200.0	-43.3
TRINIDAD	16203.0	7544.8	7622.2	8779.1	4879.7	-53.4	1.0	15.2
BELIZE	23.5	27.8	27.8	27.8	0	18.3	0.0	0.0
BAHAMAS	0	0	0	0.8	0			
OTHER CARIBBEAN	123.4	54.7	35.1	43.7	87.2	-55.7	-35.8	24.5
CUBA	0	0	0	0	0			
FRENCH W. I.	16.5	12.7	12.5	21.4	16.2	-23.0	-1.6	71.2
CURACAO	0	0	0.2	5.3	0			2550.0
OTHERS	106.9	42	22.4	17	71.0	-60.7	-46.7	-24.1
E. E. C.	47253.8	55155.9	48746.1	41025.2	25842.4	16.7	-11.6	-15.8
UNITED KINGDOM	20527.3	18370.1	19982.1	15508.4	10471.9	-10.5	8.8	-22.4
NETHERLANDS	13103.7	19988.5	18018.0	19092.2	12809.5	52.5	-9.9	6.0
BELGIUM	1953.0	2290.6	0.0	0	0.0	17.3		
WEST GERMANY	11210.4	14446.0	10601.2	6358.1	2320.5	28.9	-26.6	-40.0
ITALY	2.5	0	0	0	0.0	-100.0		
FRANCE	65.1	0	208.2	60.5	228.3	-100.0		-70.9
DENMARK	19.5	24.4	36.6	6	12.2	25.1	50.0	-83.6
SPAIN	372.3	36.3	0	0	0.0	-90.2	-100.0	
U.S.S.R.	0	0	0	0	0.0			
REST OF EUROPE	1070.6	149.8	1674.1	10.3	961.7	-86.0	1017.6	-99.4
NORTH AMERICA	4632.0	6815.0	9410.4	8206.4	4041.3	47.1	38.1	-12.8
U.S.A.	2821.9	4042.4	7720	5985.2	3117.6	43.3	91.0	-22.5
CANADA	1810.1	2772.6	1690.4	2221.2	923.7	53.2	-39.0	31.4
C & S AMERICA	172.0	4549.5	3010.5	2026.7	798.0	2545.1	-33.8	-32.7
ALL OTHER	411.4	2180.9	855.3	1066.9	1788.9	430.1	-60.8	24.7
TOTAL	71370.6	80460.2	76605.2	67429.5	43792.1	10.7	-4.2	-12.0
CARICOM (%)	24.8	14.4	16.8	22.3	23.5	-41.9	16.7	30.7

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TABLE C-3-b
IMPORTS - DIRECTION OF TRADE

(MAIN COUNTRIES) EC\$ '000

COUNTRIES	1986	1987	1988	1989	JAN-SEPT 1990	% CHANGE		
						87/86	88/87	89/88
O. E.C.S.	6133.6	7474.2	6708.0	8586.0	6000.3	21.9	-10.3	28.0
Antigua & Barbuda	466.7	428.5	258.0	221.3	266.4	-8.2	-39.8	-14.2
Dominica	1240.2	1477.8	1314.0	1380.4	824.6	19.2	-11.1	5.1
Montserrat	14.0	7.5	1.0	0.7	1.6	-46.4	-86.7	-30.0
St. Kitts	153.4	287.4	357.0	315.9	339.2	87.4	24.2	-11.5
St. Lucia	2760.2	3324.5	3841.0	4450.1	3353.8	20.4	15.5	15.9
St. Vincent	1499.1	1948.5	937.0	2217.6	1214.7	30.0	-51.9	136.7
OTHER CARICOM	42816.3	41249.4	45458.0	52436.2	41789.2	-3.7	10.2	15.4
Barbados	7935.1	7603.1	2930.0	10816.7	7070.4	-4.2	30.6	8.9
Belize	7.8	6.6	124.0	24.9	0	-92.3	20566.7	-79.9
Guyana	725.0	779.6	697.0	1024.4	538.4	7.5	-10.6	47.0
Jamaica	3823.9	4309.6	3745.0	4601.6	2931.7	12.7	-13.1	22.9
Trinidad	30324.5	28556.5	30961.0	35968.0	31248.7	-5.8	8.4	16.2
Bahamas			1.0	0.6	0			-40.0
OTHER CARIBBEAN	5447.9	4406.3	0	9659.3	4804.4	-19.1		
Dominican Rep.	2672.2	2497.7		3775.9	1940.4	-6.5		
French W.I.	322.6	124.9		117.3	114.3	-61.3		
Puerto Rico	1242.5	1527.1		3595.9	1780.3	22.9		
Curacao	76.8	151.6		2075.7	922.7	97.4		
Others	1133.8	105.0		94.5	46.7	-90.7		
E. E.C.	54588.5	58887.2	61303.0	65684.7	45455.8	7.9	4.1	7.1
United Kingdom	38203.5	40484.4	40752.0	46633.5	31720.5	6.0	0.7	14.4
Netherlands	5029.7	5056.1	5776.0	5625.5	5654.7	0.5	14.2	-2.6
France	1352.0	2211.6	2022.0	1959.8	1782.5	63.6	-8.6	-3.1
Denmark	2434.4	2572.5	2477.0	3739.9	1884.7	5.7	-3.7	51.0
West Germany	3274.0	4283.8	4445.0	3501.9	2045.8	30.8	3.8	-21.2
Belgium	558.7	538.7	469.0	652.2	395.1	-3.6	-12.9	39.1
Italy	2136.7	2090.7	3901.0	2022.8	898.7	-2.2	86.6	-48.1
Rep. Ireland	809.2	803.5	881.0	838.8	846.7	-0.7	9.6	-4.8
Greece	19.4	74.9	15.0	131.5	23.7	286.1	-80.0	776.7
Portugal	220.1	361.9	167.0	195.2	125.7	64.4	-53.9	16.9
Spain	550.8	409.1	398.0	383.6	77.7	-25.7	-2.7	-3.6
REST OF EUROPE	2121.9	11658.6		3674.9	2683.3	449.4		
NORTH AMERICA	74167.5	78515.2	74210.0	88768.2	71475.0	5.9	-5.5	19.6
U.S.A.	56468.6	62796.4	60682.0	78032.8	61614.5	11.2	-3.4	28.6
CANADA	17698.9	15716.8	13528.0	10735.4	9860.5	-11.2	-13.9	-20.6
C & S AMERICA'S	10072.1	8093.2		9814.5	7671.9	-19.6		
JAPAN	15704.1	17230.0		17473.5	15434.6	9.7		
OTHER ASIA	10643.5	7248.9		13165.5	8703.4	-31.9		
AUSTRALASIA	3439.4	2954.0		1983.9	5279.0	-14.1		
Australia	152.3	213.6		123.0	70.4	40.2		
New Zealand	3287.1	2740.4		1860.9	5208.6	-16.6		
OTHER COUNTRIES	315.0	1696.7	61167.4	1072.5	99.9	438.6	3505.1	-98.2
TOTAL	1225449.8	1239413.7	1248846.4	1272319.2	1209396.8	6.1	3.6	9.4
% CARICOM	21.7	20.4	21.0	21.4	22.8	-6.5	1.1	6.9

SOURCE: CENTRAL STATISTICAL OFFICE

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TABLE C-4
SELECTED DOMESTIC EXPORTS BY COUNTRY OF DESTINATION

SELECTED DOMESTIC EXPORTS
BY COUNTRY OF DESTINATION Z.C.\$000

1989 - 1990

COMMODITY	UNIT	COUNTRIES	1989		1990 JAN-SEPT	
			QUANTITY	VALUE	QUANTITY	VALUE
BANANAS	000 (kg)	UNITED KINGDOM	7675.6	10825.7	5928.5	8213.5
		TRINIDAD	1005.5	1285.1	0.0	0.0
		UNITED STATES	0.8	0.7	0.0	0.0
		TOTAL	8681.9	12111.5	5928.5	8213.5
COCOA	000 (kg)	UNITED KINGDOM	211.6	922.3	187.6	885.8
		CANADA	47.4	202.2	0.0	0.0
		UNITED STATES	234.8	1633.0	149.7	1064.5
		HOLLAND	721.0	3303.7	657.6	2905.1
		FRANCE	0	0	47.9	228.3
		JAPAN	140.7	6.6	335.3	1584.7
		TOTAL	1355.5	6067.8	1378.1	6668.4
NUTMEGS	000 KG	UNITED KINGDOM	189.0	2384.3	96.4	851.5
		CANADA	99.1	1730.1	43.1	616.3
		GUYANA	0.3	5.5	0.0	0.0
		TRINIDAD	0.9	16.9	1.0	16.2
		VIRGIN ISLANDS (BR)	0.3	4.5	0.3	5.5
		DOMINICA	0.9	15.9	0.3	5.0
		ST. LUCIA	0.1	1.9	0.1	1.1
		ANTIGUA	0.2	4.0	0.1	1.5
		ST. KITTS	0.1	2.4	0.1	1.0
		BARRADOS	1.7	30.8	2.0	33.7
		JAMAICA	18.0	314.5	0.1	1.1
		BELIZE	1.6	27.8	0.0	0.0
		JORDON	19.0	309.4	12.8	203.7
		UNITED STATES	137.9	2345.1	17.8	278.3
		BRAZIL	53.4	936.7	0.0	0.0
		COLOMBIA	15.2	258.1	0.0	0.0
		ARGENTINA	45.2	826.3	45.2	729.5
		HOLLAND	1059.9	15778.5	951.5	9844.3
		GUADLOUPE	1.0	18.8	1.0	16.2
		WEST GERMANY	111.7	2258.6	141.7	1087.9
CURACAO	0.2	2.6	0.0	0.0		
ISRAEL	6.6	118.8	0.0	0.0		
EAST GERMANY			50.8	954.3		
URUGUAY			14.2	68.5		
TOTAL			1762.3	27391.5	1378.5	14715.6

TABLE C-4 (continued)

SELECTED DOMESTIC EXPORTS
BY COUNTRY OF DESTINATION E.C.\$000

1989 - 1990

COMMODITY	UNIT	COUNTRIES	1989		1990 JAN-SEPT	
			QUANTITY	VALUE	QUANTITY	VALUE
MAIZE	000	UNITED KINGDOM	48.5	1332.3	35.3	635.4
	KG	CANADA	13.3	436.7	12.2	287.8
		TRINIDAD	2.3	72.0	0.0	0.0
		VIRGIN ISLANDS (BR)	0.01	0.4	0.0	1.3
		ST. LUCIA	0.03	1.1	0.0	0.5
		BRASIL	0.1	3.4	0.0	0.0
		WEST GERMANY	114.7	4099.5	67.2	1401.9
		HOLLAND			6.6	79.9
		TOTAL	178.94	5945.4	121.35	2406.8
FLOUR		DOMINICA	731.1	725.4	393.0	420.0
		ST. LUCIA	1220.0	1246.9	725.7	757.6
		TOTAL	1951.1	1972.3	1118.7	1177.6
WHEAT BRAN		ST. LUCIA	81.8	63.9	377.0	78.3
		BARBADOS	113.9	94.8	200.0	36.5
		TOTAL	195.7	158.7	577.0	114.8
CLOTHING		TRINIDAD		1569.6		1321.5
		UNITED STATES		15.4		958.9
		ARTIGUA		41.5		46.7
		ST. VINCENT		81.4		56.7
		ST. KITTS		13.3		0.0
		BARBADOS		285.4		957.9
		PUERTO RICO				2.5
		ST LUCIA				2.6
		DOMINICA				32.7
	TOTAL		2006.6		3379.5	
FRESH FRUITS		TRINIDAD	1733.9	2859.5	919.6	1491.6
		UNITED STATES	8.4	9.5	20.0	46.3
		UNITED KINGDOM	4.2	7.1	2.9	4.8
		BARBADOS	65.8	109.3	0.0	0.0
		CHILE	1.1	2.1	0.0	0.0
		U.S.V.I.			22.7	32.9
		TOTAL	1813.4	2988.1	965.2	1575.6

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TABLE C-4 (continued)

**SELECTED DOMESTIC EXPORTS
BY COUNTRY OF DESTINATION E.C.\$000**

1989 - 1990

COMMODITY	UNIT	COUNTRIES	1989		1990 JAN-SEPT	
			QUANTITY	VALUE	QUANTITY	VALUE
PAINTS & VANISH		ST. VINCENT	27.4	200.5	19.5	152.7
		ST. LUCIA	87.0	625.7	84.6	602.3
		ST. KITTS	15.7	125.3	4.0	40.7
		DOMINICA	7.7	35.0	14.5	108.8
		ANGUILLA			1.6	10.1
		ANTIGUA			1.6	12.3
		TOTAL	137.8	986.5	125.8	926.9
TOILET PAPER		TRINIDAD	149.8	1760.6	63.5	708.8
		DOMINICA	4.3	48.0	136.2	378.6
		ST. VINCENT	27.8	311.2	12.0	133.3
		ST. LUCIA	4.3	52.3	151.8	529.9
		ST. KITTS	27.8	364.4	12.7	157.0
		BARRADOS	8.6	89.9	17.1	179.4
		JAMAICA	17.1	227.4	39.6	396.5
		ANTIGUA			7.9	98.6
		ANGUILLA			4.3	52.5
		TOTAL	239.7	2853.8	445.1	2439.6
	GRAND TOTAL		62482.2		41618.3	

SOURCE: CENTRAL STATISTICAL OFFICE

TECHNICAL ANNEX D

ST. LUCIA

CHEMONICS

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TECHNICAL ANNEX D
COUNTRY: ST. LUCIA

A. DESCRIPTION OF ISLAND'S AGRICULTURE

St. Lucia's agriculture is dominated by banana and coconut production. The latter experienced an important decrease due to the low copra demand for oil extraction. No statistical information on the production levels by crop was available, but we can appreciate in Table D-1 an important number of small holdings per crop. This high number of holdings per crop is explained by inter-cropping of coconuts and other crops.

The land area suited for agriculture is reported to be 54,000 acres of which approximately 50 percent is estimated to be actually under production. Around 10,000 acres are in banana production.

For the period 1986 to 1990 the Agricultural Sector contributed with an average of 14.5 percent to the GDP (at Factor Cost-Constant Prices - 1985); Transport and Communication averages 15.72 percent, Government Services 15.56 percent, and Hotels and Restaurants only 7.05 percent (Table D-2).

The GDP for 1990 at Factor Cost in Current Prices is reported at EC\$ 841.4 million, with Total Domestic Exports of EC\$ 324.7 million of which 63.2 percent or EC\$ 205.2 million are Agricultural Exports. Banana exports for 1990 were EC\$ 186.9 million which represents 91.1 percent of total Agricultural Domestic Exports or 57.6 percent of Total Domestic Exports and a contribution of 22.2 percent to the GDP.

1. **Area: 238 sq. miles (616 sq. km.).**
2. **Population and percent in agriculture**

The total estimated population for 1989 for St. Lucia is of 148,183 of which 38 percent or 56,000 live in Castries, the capital city. Around 20-25 percent of the work force is reported to be involved in agricultural activities.

3. **Main agricultural production and exports**

An estimated 90 percent of the farms are reported to be between 1 to 5 acres big, the main production being cocoa, fruit trees (mangoes and citrus) and bananas. Other exportable crops produced are: coconuts, breadfruit, hot peppers, plantains, and vegetables.

St. Lucia's trade balance for 1990 is largely negative with estimated imports of over EC\$ 720 million and approximately EC\$ 325 million of exports.

a. **Regional Trade**

Regional exports to the Caribbean Islands during 1990 represent 18.1 percent of the total volume of fresh agricultural products exported (Table D-3). Antigua and Barbados account for almost 83 percent of the total regional trade of these products. Individually they represent 45 percent and 37.6 percent, respectively.

b. **Foreign Trade**

The volume of exports of fresh agricultural products to the U.K. during 1990 represents 70 percent of the total exported volume to the extra-regional market or 57.4 percent (1,261.3 tons) of total fresh products exports of 2,197.3 tons.

B. ORGANIZATION AND STRUCTURE OF THE MARKETING BOARD

The St. Lucia Marketing Board (SLMB) was established originally to be in charge of promoting the marketing of agricultural products. The SLMB's current operations are mainly commercial contrasting with the responsibility of developing the agricultural marketing at the producer's and exporter's level. Three main reasons are reported to be the cause of this deviation from the original mandate:

- Excessive government intervention,
- Lack of financial and human resources, and
- The organization set up as a commercial enterprise.

The SLMB's commercial activities are basically imports and purchase of agricultural products for domestic wholesale and retail distribution as well as for exports. The reported value of local products purchased during 1990 experienced a 10.4 percent increase over the previous year attaining EC\$ 754,867. A slight increase of approximately 5 percent is expected for 1991.

Farmers are contracted by the Marketing Board in order to assure the supply. The contract stipulates the commodity, time and/or period of supply, the quality of the product, basic or minimum price to be paid. A first quality product is demanded for exports and a direct relationship is established between quality and price paid. There is no penalty clause in the case that farmers do not honor the contract.

The Marketing Board retails the products imported as well as the domestic production bought from farmers at their city building. Wholesales carried out through its **delivery service** to hotels, restaurants and supermarkets account for 65 percent of their sales, the balance through their own facilities to vendors and others. It does not sale in the Municipal Market in order to avoid competition to vendors.

Exports:

Export sales for 1990 total EC\$ 430,972, a 34.3 percent increase over the 1989 figure.

SLMB buys the agricultural products for exports mainly at the farm in order to avoid delays in delivery, thus delays in exports. Transportation facilities are not commonly owned by producers.

SLMB exports to the extra-regional market and the Hucksters cover the regional market. Hucksters buy agricultural products for exports directly from the farmers.

The Marketing Board exports directly to wholesalers in the United Kingdom and Holland. Domestic prices are reported to be "stronger" than export prices which are set accordingly by the market. Export prices have never fallen below operational costs. The importer gives a referential buying price but no buying commitment nor supply contract is made.

The United Kingdom is reported to be more attractive than other extra-regional markets because prices are higher. This market demands higher volumes and in addition, there is more space available for air transportation. There are weekly flights of Boeings 747 to the United Kingdom while smaller planes fly to Canada.

Air transportation costs are very significant, approximately 50 percent of the CIF value. No duties are paid for exports to the United Kingdom or Canada.

Imports:

Imports for 1990 were practically the same than for 1989, for a total value of slightly less than EC\$ 2.45 million. According to the 1991 budget imports should increase to over EC\$ 3.2 million (a 30 percent increase over 1990).

Imports are made to cover domestic deficits. The information to determine the deficit level of fresh agricultural products is worked closely jointly between the SLMB and the Ministry of Agriculture. The latter grants the import license required in order to effect imports. If processed products have to be imported, the Supply Unit of the Minister of Trade is in charge of granting the import license.

Practically all imports come from the U.S.. There are approximately 40 suppliers from Miami. Products are shipped weekly in refrigerated boats directly into St. Lucia. The distribution of these products within the country is the same used for domestic production.

A 30 to 40 percent SLMB mark-up is reported for the imported products.

1. The number and names of the enabling legislation setting up the board are:

"The Act is No. 18 of 1967. It may be cited as: "The Saint Lucia Marketing Board Act 1967".

2. The SLMB was originally established by the Act under the responsibility of the Ministry of Trade, now is reported to be under the responsibility of the Ministry of Agriculture which gives the general directions on the policy to be followed. The Board is free to

make "standing orders regulating its own procedures" from the moment they are accepted and confirmed by the Governor, who is also entitled by the Act to make regulations on:

- "(a) prescribing the procedure to be adopted by the Board, and requiring returns and reports to be made by the Board;
 - (b) prescribing the principles to be followed by the Board in the exercise of its powers and functions;
 - (c) placing restrictions or limitations on the exercise of the powers of the Board;
 - (d) imposing fees to be collected by the Board in respect of licenses or any other matter of thing, and providing for the disposal of such fees; and
 - (e) generally for the better carrying out of the duties and functions of the Board under this Act".
3. The Act stipulates that the Board should consist of a minimum of 5 (five) and a maximum of 9 (nine) members all appointed by the Minister of Agriculture. The Minister also has the power to revoke any member if he considers necessary. The Board elects the Chairman and a Deputy Chairman. The term of the appointment is for maximum 2 (two) years, with eligibility for reappointment.
4. The statutory functions of the Board as stipulated by the act are:
- "(a) to stimulate, facilitate and improve the production, marketing and processing of produce;
 - (b) to secure the most favorable arrangements for the purchase, handling, transportation, storage, exportation, shipping, marketing and sale of produce whether in the Island or out of the Island;
 - (c) upon being required to do so by the Minister to make recommendations on any matter directly or indirectly relating to the production and marketing of produce; and
 - (d) generally to carry out the provisions of this Act".

The powers granted by the Act to SLMB in order to achieve its functions are:

"(a) buy, sell, import and export any produce by wholesale or retail:

Provided that it shall not without the consent of the Minister deal in any produce the marketing of which is under the control of another statutory authority or statutorily controlled;

(b) act as sole importer of any article of produce for which it offers a guaranteed buying price;

- (c) establish and operate depots and agencies for the purchase, delivery, grading, packing and sale of produce;
- (d) enter into contracts for the purchase and sale of produce upon such terms and conditions as it may determine;
- (e) enter into contracts for the transport of any produce, and such other commodities as may facilitate the operations of produce;
- (f) establish itinerant systems for the purchase and sale of produce;
- (g) establish and operate any plant or factory for preparing, processing or packing produce;
- (h) establish and operate cold storage facilities or any other facilities for the storage of produce;
- (i) regulate the grading of produce and prescribe the grades which shall be employed in the purchase by the Board of such produce;
- (j) dispose of produce on behalf of any producer or co-operative society;
- (k) trade and deal in fodder and feed for livestock, seeds, fertilizers, insecticides and other production requisites;
- (l) purchase, transport, store, insure, handle and sell any packing material used in connection with produce;
- (m) fix guaranteed minimum prices at which it shall purchase stated kinds, quantities, and grades of any produce;
- (n) advance money to producers for such agricultural purposes and on such security as it may from time to time determine;
- (o) make initial payments to producers, under such terms and conditions as it may determine in respect of produce purchased from them for the purpose of resale and make such further or bonus payments to such producers as may prove equitable on the out-turn of such resale;
- (p) act as agent for the Government for any purpose relating to the marketing of produce;
- (q) collect and circulate statistics and other information relating to the marketing of produce;
- (r) do such other things as may be necessary for the effective carrying out of its functions and duties under this Act".

The Act also grants the SLMB powers to make regulations with the approval of the Minister, these regulations should be:

- "(a) prescribing the grades, types and quality of produce it shall accept from producers;
- (b) prescribing the prices to be paid to producers in respect of any grade, type or quality of produce;
- (c) relating to the examination and grading of produce;
- (d) controlling the prices at which **specified produce*** acquired from the Board by domestic buyers may be sold locally and the prices at which specified produce of stated grade and packing may be sold for export by licensed agents;
- (e) regulating the quantities of any specified produce which may be imported or exported by licensed buying or selling agents;
- (f) relating to the licensing and registration of producers of any specified produce;
- (g) prescribing the form of licenses to be used;
- (h) requiring importers of produce to submit documentary evidence of the source and price paid for any category of produce;
- (i) establishing agricultural marketing schemes for one or more categories of produce;
- (j) requiring registered producers to keep records and, where required, to furnish returns of all specified produce sold by them; and
- (k) generally for the better carrying out of its functions and duties under this Act".

*Any product of St. Lucia can be declared "**specified produce**" by the Minister, from the moment the marketing of the product is not under the responsibility of another statutory authority. The Act stipulates that SLMB will be the sole **purchaser, handler, processor, seller and exporter** of specified products. A license from the Marketing Board has to be granted in order to have a third person and/or organization to **purchase, sell, export or otherwise deal** with "specified produce". Such operations without the appropriate licensing from SLMB are considered illegal thus liable to legal sanctions.

The Marketing Board is also granted the power to appoint and grant licenses to "agents" for **buying, selling, importing, exporting or processing** any "specified produce".

5. The infrastructure owned and maintained by the board consists of:
 - A building holding offices, a warehouse with a capacity of approximately 50,000 lbs., and cold storage facilities (20 years old).
 - An owned covered packing house, wash tanks and warehouse plus 2 rented small depots. All these infrastructure is strategically distributed in the field.
 - Three vehicles: a pick-up (1 ton), a van (2 tons) and a flat van (3 tons).

The products for exports are gathered and sheltered temporarily in the small depots then taken to the main warehouse for washing, grading and packing.

6. As of 1990 the Marketing Board was in a deficit financial situation. Although a net profit of EC\$ 534,464 was attained during the year, the accumulated deficit at the beginning of the year of EC\$ 945,270 left an accumulated deficit by the end of the year of EC\$ 410,806.

SLMB's actual main income sources are:

- Import activities (30-40 percent mark-up),
- Exports (20-30 percent gross benefit is reported, the overhead is not included).

No financing from international institutions or government is reported.

7. The "revitalization" process of the Marketing Board started in 1988 is showing positive but slow results. The short-term strategy focuses mainly on attaining "a satisfactory level of trading profitability".

The main reason for in-existent long-term strategies is the lack of a "clearly defined role" for the SLMB. The Ministry and corresponding authorities will have to review and actualize the duties and responsibilities stipulated by the act for the SLMB.

The Government is demanding that the Marketing Board provide services and play a regulatory role while continuing with the trade activities. There are no specifications on the development program and priorities of the Board. The focus of attention are the commercial activities, not the regulatory role and services provided.

The Marketing Board will continue to participate in developing projects in collaboration with other institutions. The lack of financial resources is the main constraint for providing limited support to the diversification projects.

SLMB and private exporters are marketing the production resulting from diversification.

There is a "Fresh Produce Exporters Association" that at present consists of 6 (six) members. This Association could take over the trading activities of SLMB, but needs institutional strengthening and official support (Government and international development institutions) in order to properly accomplish its new responsibilities.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

1. Other Statutory Boards

The marketing of traditional products, bananas, coconut (by products) and cocoa are under the responsibility of different statutory boards: the St. Lucia Banana Growers Association (SLBGA), the St. Lucia Coconut Growers Association (SLCGA) and the St. Lucia Agriculturalists Association Limited (a private commercial company).

a. St. Lucia Banana Growers Association

SLBGA is a statutory board under sight of the Ministry of Agriculture, it was established as a public corporation to be the sole exporter of bananas in the State. Any contravention on this sense is liable to legal convictions.

The Association buys from 8,000 members; the size of production areas range from 0.5 to 600 acres. Total production averages approximately 140,000 M.T. of which approximately less than 130,000 M.T. are exported through GEEST to the U.K. St. Lucia contributes with approximately 49 percent of the total WINEAN exports. Prices paid to farmers fluctuate from EC 28 cents/lb. in January to EC 42 cents/lb. in June, this as a result of seasonal fluctuations in the U.K. market.

(1) The number and name of enabling legislation setting up the board are:

Act No.6 of 1967, and may be cited as **The Saint Lucia Banana Growers Association Act 1967.**

(2) SLBGA is under the Ministry of Agriculture.

(3) The Board consists of 11 members -- three are appointed directly by the Minister of Agriculture, and the other 8 members are elected at the annual conference of delegates representing the different district branches of the State as well as the different farm sizes (i.e., small, medium and larger growers).

In 1990, an amendment was made which states that the number of members of the Board will be 16, 11 nominated by the growers and 5 appointed by the Minister of Agriculture.

The Minister's appointees should be "duly qualified in the area agriculture, banking, trade, finance, business management, accounting or other related subjects". The term of representation for the directors is of 2 (two) years.

The Board elects, among the Directors, the Chairman and deputy Chairman and has the power to remove them at any time if considered necessary.

(4) The statutory duties of the Association as stipulated by the Act are:

"(a) to market and control all bananas produced in the State;

(b) to promote, foster, encourage and institute measures for the well-being of the banana industry of the State and for the control and elimination of any disease affecting bananas and to provide for the development, purchase, processing, manufacture and transportation of bananas and all things in relation to bananas as may appear to the Association to be incidental or conducive to such well-being and

- (c) to institute, conduct, finance, assist and superintend research activities, experiments and operations-
 - (i) to improve the cultivation, production, species, grade and yield of bananas grown in the State; and
 - (ii) for the development of bananas wholly or partially immune to disease."

The services that SLBGA is providing farmers are summarized in:

- Pest and disease control service (mainly control of the yellow sigatoka);
 - Inspection and services provided at the buying depots;
 - Transportation costs covered when bananas delivered at the wharf;
 - Inspection service by the Association and by GEEST at the port (when directly delivered by the farmer);
 - Provides packaging material; and
 - Imports and distributes farmers' inputs to its associates through 3 warehouses (approximately 12 percent markup of the CIF value is practiced on these imports).
- (5) The Association mainly buys from the growers at their 23 depots strategically located in the production areas. SLBGA actually owns 6 (six) trucks contrasting with 30 that it used to operate; approximately 38 percent (3,000 of 8,000) of the members own transportation vehicles. SLBGA owns one warehouse and rents another from the port authority.
- (6) The SLBGA'S financial situation as reported for 1989 did not look very promising. The accumulated deficit for the beginning of the year was EC\$ 130,522 and at the end was EC\$ 3,387,490. 1991 will not see an improvement on its financial situation.

The main source of income to cover administration and services costs is the cess collected from growers at EC 23 cents/exported lb. of which approximately 48 percent or EC 11 cents is used to provide the high-cost packaging material.

- (7) The short-and medium-term goals of SLBGA are to correct the quality problem of the exported products. At the end of 1990 approximately 6,000 M.T. of bananas were rejected from St. Lucia (not all were rejected due to low quality).

WINBAN's research and development program is directed mainly to improve quality by a better use of fertilizers, adequate packing, correct disease and pest control, etc..

Education of farmers on the quality of bananas for exports is envisioned. A change in packaging material is also expected; stronger boxes and better quality are being identified. A return to cluster packing is also expected.

Growers are being penalized if repeated low quality is delivered. After three times, the farmer will not be allowed to sell for six weeks.

The long-term policy could be resumed as "How to survive in the European Market". The lack of information on conditions after 1992 leads to a lot of speculation. The preferential treatments on assured market as well as preferential prices (2.5 to 3 times the international price) are expected to change gradually; that is, prices will somehow continue to be regulated by the U.K. Government's measures and gradual influence from the market is expected.

Governments' and WINBAN's representatives are meeting with U.K. authorities in order to determine the banana policy to be adopted by St. Lucia. A possible quota system could be installed for the Islands.

b. Saint Lucia Coconut Growers Association (SLCGA)

SLCGA has 3,000 members, 95 percent of which are very small farmers. The coconut growers association is mandated by law to trade only with coconut and coconut by-products. Most of the coconut on the island is produced by intercrop farming.

The coconut is sold mainly as copra to the Copra Manufacturers Limited (CML). SLCGA is the major holder in CML with 52 percent of the shares, 48 percent is held by various private shareholders.

Sales of crude and refined oil are made only to the CARICOM. The plant has a refining capacity of 100 M.T./day. The CML's factory has practically closed down due to a drastic drop in sales because the buying agreement is not honored by main buyers like Trinidad, Jamaica and Barbados. Trinidad is reported to be extracting soybean oil from soybeans imported from the U.S.

CML is also producing margarine and shortening from fish oil imported from Norway and Japan. The shortening is only sold in the OECS countries. It also makes shortening for Trinidad (packed and branded accordingly) under license of the Levy Brothers Co..

CML also makes its own plastic bottles for its oil. The production capacity is of 40,000 to 50,000 bottles/day. It also has a small operation of plastic bags.

The lack of capacity to compete in the international market is explained by the "too-high buying price" set for copra by the Oil and Fats Agreement of the Chaguarames. The domestic price is EC 50 cents/lb. against an international

price of EC 15 cents/lb. This is exacerbated by the fact that international prices for refined oil have decreased.

Copra production is expected to increase when the smaller inefficient banana growers will be forced to go out of that production to another crop. Coconut has a good opportunity because the palm trees are already in place and no additional efforts for production are necessary. Copra production is actually at 5,000 M.T./year, but could be doubled with proper management of palm trees.

The low financial obligations of the average population of St. Lucia foresees low social reactions for 1992. The 1980's hurricane is given as an example to show how St. Lucians survive "when no incomes existed". The expected reduction of the level of living would pick up the upward trend once other exports establish. A reported large middle class would be ready to experience and with capacity to absorb the above mentioned results. The solidness of the local currency will contribute to this. The EC\$ assets are compared, in percentage, to the Japanese Yen (with approximately 130 percent of its value).

The medium-term goals of the SLCGA are to participate with CML's products in the extra-regional market, especially into Puerto Rico and the Dominican Republic.

2. Private Sector

a. Saint Lucia Agriculturists Association Limited

The Agriculturists Association is a company limited by guarantee and not having a shared capital. The objectives of the Company are:

"to promote, facilitate and protect the economic production and marketing of agricultural products".

These objectives allow the Association to be exempted from income tax ("under Section 25 (1)(S) of the St. Lucia Income Tax Act").

Any person and/or company owning a minimum of 1 acre of cultivated land is eligible for membership within the Association. In spite of being the only exporter of cocoa, only 130 members out of the total list of 1,500, are cocoa producers.

The Agriculturists Association has been the traditional exporter of cocoa from St. Lucia, actually their only export. Before the 1980 hurricane they also exported spices. Very small scale contraband shipments of cocoa are reported to Martinique.

Exports of cocoa averaged around 40 M.T./year for the last decade. An important decrease in production has been experienced since 1980's hurricane Allen, when exports were 101 M.T. The highest peaks were attained in 1966 (267 M.T.), the average exported volume during the 60's was approximately 200 M.T.

The main activities of the Association are far from depending on exports of cocoa. Their principal source of income is merchandising of agricultural implements and tools, building material, fencing wire, etc. Their markup ranges from 5 to 20 percent (5-10 on farmers' inputs and 20 percent on building material).

Their commercial activities compete directly with other importers. Their imports carry "a moderate markup", which makes them more competitive in the market. Merchandise accounted for 99 percent of the total 1990 inventory. The reported income from cocoa operations for the same year was EC\$ 450, and the merchandise income was slightly over the EC\$ 1 million.

b. Fresh Produce Exporters Association (FPEA)

- (1) The marketing of nontraditional agricultural fresh products to the extra-regional markets is done mainly by the FPEA, which account for 95 percent of these exports, and the balance is made by the SLMB. Hucksters are active only within the regional market.

The FPEA was created 3 (three) years ago and is established with a legal body. Their market information is informally released to its 6 (six) associates.

The lack of financial support, manpower and equipment do not allow FPEA to provide services to its associates, actually limited to work as an umbrella organization in charge of lobbying with government's officials for better marketing services.

- (2) The size of shipments made by FPEA associates range from 2,500 to 4,000 Kg./week. All shipments are made by on British Airways, BWI and American Airlines.
- (3) Root crops are considered too expensive to export. The main exported products are:
 - breadfruit
 - mangoes*
 - plantains
 - hot pepper
 - soursop*
 - june plums*

*These products are not permitted to enter the U.S.

Exports are made to the U.K., Canada, and the U.S. (Miami and New York). Exports to the latter need a phytosanitary certificate from the Ministry of Agriculture, while exports to the U.K. only the invoice. The EUR-1 form which is similar to a certificate of origin entitles shipments to go into the U.K. without paying duties.

- (4) FPEA's associates pick up products from farmers. They contract production a season in advance stipulating minimum prices, quality, volumes, varieties and time of harvesting. Some times money is advanced to some farmers, but it is not a common practice.

Farmer seem to accept more the private exporters' activities than those of SLMB's. The Boards image has been affected by the negative experiences when it could not meet its buying obligations.

- (5) The general policy of FPEA members is directed mainly to accomplish its individual goals as exporters, that is
- Seek a more professional approach to export business;
 - Approach the European market as a whole and not only the U.K., this foreseeing any event in 1992; and
 - Place all the attention in the extra regional market. No interest is placed in the regional market, mainly because of: bad transportation service, low-volume markets, lower prices that do not justify additional efforts.

c. Evans International

Evans International is an importer and exporter of agricultural products, also operates a retail outlet in the city (named "Country Market"), where wholesales of agricultural fresh products are also effected.

It purchases the products for the local market at its facilities in the City. Purchases of products for exports are done mainly at the farm level; higher volumes, timing and better handling are the reasons for this. Products are taken from the farms to its warehouse where they are washed and packed. To transport all the products, Mr. Evans has 2 (two) vans and one truck.

Mr. Evans seems to be a very active exporter to the principal markets in Barbados, U.S., U.K. and Puerto Rico. The first is reported to be the most attractive market because of its consistency contrasting with the seasonal demands of the other markets. Air transportation is used to accomplish its export operations.

The main products exported to Barbados are plantains, breadfruit, mangoes and bananas. Shipments average 4 M.T./week for the year round.

Imports of fresh products that SLMB is not importing, i.e., apples, grapes, broccoli, cauliflower, are wholesaled and retailed at the "Country Market" in Castries. An import license for these products is required.

Evans International also buys products that only the Marketing Board is importing (tomatoes, cabbages, lettuces, etc.). The Board markups these products by 25 to 50 percent, as indicated by the buyer.

Evans International is expecting to expand to new European markets, like Finland. The availability of space in airplanes for this country presents a good opportunity.

A move into agricultural production is foreseen for Evans International.

d. James Valton

He is a pioneer on exports of agricultural fresh products, a private exporter directly involved in agricultural production with 20 cultivated acres of 50 he owns. Exports are entirely to the U.K., with shipments averaging 4 M.T. and ranging from 1 to 6 M.T./week, according to the season.

The main exported products are: mangoes, breadfruits, plantains, hot peppers and avocados.

His main bottleneck to export on a regular basis is transportation and/or space availability, especially during the touristic season. If transportation could be improved an immediate increase of exports could be attained in spite its of high cost (EC 1.98/Kg).

The cost of the packaging material is a high component of the cost structure, but nonetheless far away from transportation. The cost of carton boxes is EC\$ 2.76 per box for mangoes and EC\$ 2.82 per box for breadfruit.

In order to improve quality corrections must be made at the post-harvesting, and handling of the products. Until now this has not constituted a main problem for his exports.

e. Valton Enterprises Ltd.

Valton Enterprises has been involved in the trade of agricultural products for over 15 years. Products for exports are bought from approximately 150 farmers and only directed to the U.K. market through the importer-wholesaler.

The additional commercial activity is selling construction material (cement, lumber and zinc) in the region of Dennery.

The products exported are: mangoes, breadfruits, soursop, plantains, hot peppers and avocados.

Shipments range from 8,000 to 10,000 Kg./month. Airtransportation is used twice a week -- British Airways and BWI. The cost of transportation is of EC\$ 1.98/Kg. and EC\$ 1.20 respectively.

Market demands in the U.K. are unsatisfied because of the lack of space on the airplanes. This does not allow them to establish a contract with the importers because shipments have to depend on space availability.

Flights are canceled without previous notice, and/or available space is reduced without advance notice. When shipments can not be sent, great losses are experienced because low percentages are absorbed by the local market with domestic prices but with export costs.

Contracts with producers are also constrained by the above. The operations have to be improvised; the importer communicates his needs to the exporter, and the latter has to rush into the countryside to purchase from farmers and then determine what is exportable.

The export market is very active, with narrow range price fluctuations. Quality is the main factor which influences selling prices.

Valton Enterprises employs 8 people and has 2 trucks (3 and 5 tons capacity) plus a van to collect and transport the agricultural products for exports as well as the construction material also sold by the company.

f. Dayes & D'Auvergne

They operate in a very similar way as the other private exporters. Shipments range from 1 to 1.5 tons/week.

The exported products are: mangoes, plantains, breadfruit, avocados, hot peppers, cucumbers, soursop, dry coconuts, coconut water, "caraylus" and spices. Cucumbers are bought from the SLMB. An export license is required only for coconuts and coconut water.

All these products are bought from farmers (except for cucumbers) to be selected, washed and packed for exports. Like other private exporters, they report that these operations (mainly selecting and grading) demand too much efforts.

D. DIVERSIFICATION POLICIES

1. The policy of the Ministry of Agriculture towards diversification is to look for other crops with impact at the farmers' level. Officials are conscious that the success of bananas relies mainly on its good marketing. The need to "tune up" production of other crops is evident, the cooperation of CARDI and SFAD (Small Farmers Agricultural Development) is the main key to attain this.

Authorities from the Ministry of Agriculture indicate that farmers have been restricted to plant other crops (i.e., hot peppers, ginger and root crops) because of the Marketing Board's limited purchasing capacity. Agricultural production relies on rainfall (6 months/year); little to no action is taken to install irrigation programs.

The SFAD Project is involved in influencing any of the aspects from production to marketing. Their most successful activity seems to be the development of organized and participating farmers groups. This Project is financed by CDB (37 percent), IFAD (37 percent), and local Government (26 percent).

2. The development of the regional and extra regional markets is considered very important for Government Officials. The Government is expecting some results from marketing activities of the ADCU of the OECS.

The establishment of these markets will demand a continuous output which will motivate production. The main constraint, transportation, will have to be solved in the very short term. "The market is there, the potential to produce is here but there are no transportation means", is a phrase repeatedly heard.

Marketing of domestic production is considered the Marketing Board's main responsibility, but results are limited. Again CATCO's role is not understood, and no efficient activities are foreseen with this Organization.

3. The Agricultural Marketing Sub-committee, constituted by different authorities of the agricultural sector, has been charged to prepare an Agricultural Marketing Policy. The restructuring of the SLMB is envisioned in this policy. The main role of the Marketing Board would be to develop production and marketing activities as well as provide services to the private sector which will be mostly in charge of the commercial activities.

More representation of the different private groups involved in the agricultural sector is considered in the Board of Directors. Representations of producers, exporters, domestic consumers (tourism industry included) in addition to the government's are recommended. "The SLMB would be restructured into a development institution to provide the facilitating services required." The Marketing Policy states the principal support services to be:

- Market Infrastructure Development
- Production Planning and Co-ordination
- Market Research and Intelligence
- Market Information
- Quality Control and Standards Development
- Postharvest Research

- Regional Market Co-ordination
- Identification of Training Priorities
- Bulk Input Supply and Packaging Material

It is important to make emphasize this initiative, as it is the only tangible measure taken to improve the Marketing Boards' efficiency. The strengthening of the production (farmers) and trade (exporters) sectors is also envisioned. These efforts will not be completed if transportation is not solved, lobbying by government with transportation companies is recommended in the Marketing Policy. No initiative of this type has been taken on the other visited islands. If this restructuring of SLMB is implemented, a considerable support from all the international development institutions will be required in order to accomplish it successfully and to repeat it in the other islands.

E. STATISTICAL APPENDICES

Table D-1

– Number of Holdings Growing Specified Crops by Administrative District
Source: Ministry of Agriculture of St. Lucia

Table D-2

– Gross Domestic Product at Factor Cost. Constant Prices (1985)
Source: Government Statistic Department

Table D-3

– Exports (Tons) of Fresh Agricultural Produce by Country
Source: Customs Documents

TABLE D-1
NUMBER OF HOLDINGS GROWING
SPECIFIED CROPS BY ADMINISTRATIVE BOARD

CROPS	Castries	Dennerly	Micoud	Vieux-Fort	Laborie	Choiseul	Soufriere	Canaries	Anse La Raye	Gros Islet	TOTAL
Bananas	1714	951	1320	654	464	250	373	113	260	758	6857
Coconut	1819	777	1206	811	556	821	524	124	310	914	7862
Plantain	1341	621	659	578	422	454	386	121	265	783	5640
Cocoa	639	434	473	284	319	225	371	65	131	273	3214
Coffee	474	204	521	275	259	190	352	53	84	247	2659
S. Orange	1024	399	574	390	302	315	415	70	210	337	4036
Limes	782	242	363	393	263	336	220	57	121	390	3167
Avocado	956	420	636	482	337	380	344	78	165	581	4777
Grapefruit	823	344	595	411	337	227	353	61	125	302	3978
Mangoes	1509	647	750	718	478	796	460	119	270	822	6569
Breadfruit	1527	688	932	699	466	528	487	110	263	739	6438
Cinnamon	8	11	15	8	24	3	5	1	3	3	81
Leban	7	1	1	3	4	2	-	-	1	3	22
Tangerine	4	1	-	2	8	3	4	-	1	3	26

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TABLE D-2
GROSS DOMESTIC PRODUCT AT FACTOR COST
CONSTANT PRICES (1985) (R)

₹ Millions

Sector	1986	1987	1988	1989	1990
Agriculture	81.5	67.5	92.7	88.1	93.6
Mining & Quarrying	2.7	2.7	2.8	3.4	3.2
Manufacturing	43.0	47.1	52.2	58.3	58.9
Construction	30.3	32.4	43.0	46.6	39.9
Electricity & Water	13.9	12.8	11.3	14.6	18.1
Wholesale & Retail Trade	73.1	85.0	88.4	88.5	88.5
Hotels, Restaurants & Catering	34.3	35.4	39.1	43.6	51.1
Transport & Communication	85.6	91.2	96.0	98.7	95.7
Banking & Insurance	39.6	45.1	50.1	56.1	57.5
Real Estate etc	28.8	30.6	32.7	35.0	36.0
Government Services	86.5	85.6	87.4	101.8	95.6
Other Services	21.1	21.2	23.9	25.6	26.2
Finance (Capitalized Banking & Finance Charge)	17.9	23.5	29.0	33.7	27.0
Total	520.2	535.5	582.3	600.2	611.6

Source : Government Statistics Department

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TABLE D-3
EXPORTS (TONNES) OF FRESH AGRICULTURAL
PRODUCE BY COUNTRY

COUNTRY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL 1990	TOTAL 1989	TOTAL 1988
ANTIGUA	13.6	10.3	15.1	15.0	15.2	14.9	17.0	1.2	11.7	12.5	25.0	27.5	179.0	144.9	47.7
BARBADOS	16.3	12.7	16.5	16.4	20.7	11.7	20.4	20.2	14.5	8.4	6.3	7.3	149.4	299.0	134.8
CANADA	7.5	4.7	10.4	11.0	23.4	22.0	7.7	19.7	8.4	3.2	4.8	3.2	126.0	242.0	202.1
DOMINICA	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
NETHERLANDS	2.7	5.2	2.4	---	4.4	0.6	---	1.9	2.3	---	2.0	---	21.5	1.0	7.0
MARTINIQUE	---	---	---	---	---	---	---	4.4	2.4	2.7	4.1	3.0	16.6	0.4	---
NETHERLANDS	---	3.2	1.0	1.3	3.5	1.1	---	---	---	---	---	---	20.1	---	0.1
ST. CROIX	---	---	---	---	---	---	---	---	---	---	---	---	0.0	---	2.9
ST. KITTS	---	---	---	---	---	---	---	---	---	---	---	---	0.0	2.8	---
ST. MAARTEN	---	---	0.1	---	2.1	1.5	6.5	5.3	0.6	1.3	3.7	1.0	22.1	3.1	7.2
ST. THOMAS	---	---	---	---	---	---	---	---	---	0.1	---	---	0.1	---	---
TRINIDAD	2.8	---	---	---	---	---	---	16.9	---	---	0.4	---	20.1	2.0	4.4
UNITED KINGDOM	42.9	60.9	102.4	72.2	126.7	186.7	188.0	169.6	152.8	161.6	30.7	18.8	1261.3	1415.2	1566.3
UNITED STATES	10.8	7.1	6.3	3.0	14.4	73.1	25.2	31.7	38.9	29.5	27.4	15.1	282.5	315.1	70.8
PUERTO RICO	---	---	43.8	15.6	16.3	31.4	---	---	---	---	---	---	107.1	---	---
TORTOLA	---	---	---	---	---	---	---	---	---	---	1.5	---	1.5	---	---
TOTAL	96.6	112.1	198.0	134.5	224.7	343.0	254.8	260.9	231.6	159.3	105.9	75.9	2197.3	2400.6	2143.2

SOURCE : CUSTOMS DOCUMENTS, ST. LUCIA

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TECHNICAL ANNEX E

ST. KITTS AND NEVIS

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TECHNICAL ANNEX E
COUNTRY: ST. KITTS (ST. CHRISTOPHER) AND NEVIS

A. DESCRIPTION OF ISLAND'S AGRICULTURE

The agricultural sector contributed EC\$ 29.12 million to the total 1990 nation's GDP. This represents 8.6 percent at factor cost in current prices and 7.2 percent in constant prices. The country's agricultural production is dominated clearly by sugarcane production which in spite of experiencing a negative growth rate of almost 14 percent for 1990, accounted for 46 percent of the sector's GDP for the same year, at factor cost in current prices and 39.4 percent in constant prices (Table E-1).

Other crops (mainly vegetables) in St. Kitts and Nevis are produced only during the first 6 (six) months of the year as can be seen on production estimates of the Ministry of Agriculture (Table E-2). The main constraint for a continuous output is the availability of water for agriculture.

1. Area:	St. Kitts	65 sq. miles
	Nevis	36 sq. miles
	TOTAL	101 sq. miles

2. Population and percent in agriculture

The total population of the "Federation" of St. Kitts and Nevis adds up to less than 45,000 people, approximately 35,000 and 9,500, respectively. The island of Nevis is only 2 miles away from St. Kitts.

Farming is the main reported activity on the Island of Nevis. The main crops are vegetables and coconuts, the latter being less and less important due to the decrease in demand in the international market. Sources from the Ministry of Agriculture indicate that approximately 3,000 full time farmers exist on the two islands. In St. Kitts, around 15 farmers account for almost 80 percent of the total agricultural production. Nevis was not visited by the consultant.

3. Main agricultural production and exports

Sugar amply dominates the nation's trade, with total exports of over EC\$ 27.5 million for 1989, mainly to the U.K. The main imported products are meat and meat products (EC\$ 9.6 million), cereal and cereal products (EC\$ 8.7 million), fruits and vegetables (EC\$ 6.6 million), dairy products and eggs (EC\$ 5 million) and "other food preparations" (EC\$ 4.3 million) (Table E-3).

Exports of other products (besides sugar) are very small in the trade balance. Margarine and shortening total EC\$ 3.5 million, beverages and tobacco to EC\$ 3.1 million (of which EC\$ 2.7 million is of nonalcoholic beverages).

B. ORGANIZATION AND STRUCTURE OF THE MARKETING BOARD

1. The name and number of the enabling legislation that sets up the board are: **The Act No. 19 of 1973**. May be cited as: **"The Central Marketing Corporation Act, 1973"**.

"An Act to provide for the establishment of a Corporation to be known as the Central Marketing Corporation, for the powers of the Corporation,..."

The Central Marketing Corporation is unofficially known as **CEMACO**.

2. CEMACO is under the responsibility of the Ministry of Agriculture.
3. The Board of CEMACO is constituted by 8 (eight) members appointed mainly by the Minister of Agriculture for a period not to exceed 2 (two) years but eligible for reappointment. The Act stipulates the Board composition as follows:
 - (a) An Officer (preferably an economist) attached to the Ministry of Agriculture nominated by the Minister;
 - (b) an officer attached to the Ministry of Finance nominated by the Minister of Finance;
 - (c) an officer attached to the Ministry of Health nominated by the Minister to whom responsibility for the subject of Health has been assigned;
 - (d) one member nominated by the Nevis Local Government Council;
 - (e) one member representative of the Sugar Estates selected by the Minister;
 - (f) two members representative of farmers engaged in the cultivation of small agricultural farms or holdings selected by the Minister;
 - (g) one member representative of the business community who shall be a wholesaler or retailer of produce; and
 - (h) one other member.
4. The statutory functions of CEMACO are somewhat distant from their current operations and efforts mainly directed to its supermarket activity. The Corporation is actually buying from small farmers without any type of contract or buying commitment. Contact with the farmers is mainly done on a one-on-one basis through the "Farm Coordinator" who is in charge of gathering information on product availability. Some information on the possible purchases is disseminated informally.

The main responsibilities of CEMACO, as stipulated by the Act, are:

- "(a) to stimulate, facilitate and improve the production, marketing and processing of produce in the State, particularly for the benefit of the producer;
- (b) to develop and carry out a coordinated program with the view of securing the most favorable arrangements for the purchase, handling, distribution and transportation, storage, processing, exportation, shipping, marketing and sale of produce whether in the State or out of the State and to operate and maintain services necessary or incidental thereto in particular to assist agricultural and fishery co-operative societies to dispose of their produce;
- (c) upon being required so to do by the Minister to make recommendations on any matter directly or indirectly relating to the production and marketing of produce;
- (d) to collect, analyze and disseminate where necessary statistical data on agricultural production, particularly horticultural crops and livestock numbers by obtaining basic data on acreage, yield, production, livestock numbers in collaboration with the Agricultural Extension Services;
- (e) to assist and advise producers in the selection of commodities and their delivery to the market in order to regulate market supplies and to avoid marketing gluts with a consequent sudden drop in prices;
- (f) to give, when necessary in collaboration with the Extension Service, practical demonstrations to producers in the timing of harvesting fruits and vegetables, packing and preparation for the market;
- (g) to supply to the producers the necessary means of production such as seeds, fertilizers and insecticides;
- (h) generally to carry out the provisions of this Act.

The powers granted by the Act to the Corporation are:

- "(a) to buy and sell produce;
- (b) to import and export produce;
- (c) to fix and determine the grading of produce;
- (d) to establish and operate depots and agencies for the purchase, delivery, grading and sale of produce;
- (e) to enter into any contracts for the transport of any produce or of such other commodities as may facilitate the operations of producers;
- (f) to enter into contracts for the purchase and sale of produce upon such terms and conditions as the Corporation may think fit;
- (g) to establish itinerant systems for the purchase of and sale of produce;

- (h) to establish and operate facilities for preparing and processing any produce;
- (i) to establish and operate facilities for cold storage or any other form of storage for produce;
- (j) to act as commission agents for the disposal of the produce of any producer or co-operative society;
- (k) to purchase, transport, store, insure, handle and sell packing material in such quantities and at such prices as the Corporation may from time to time determine;
- (l) to issue licenses for the exportation of any article of produce approved by the Minister.

The price policy of CEMACO is set according to the market, which is surveyed (mainly at the end user's level); purchasing prices to farmers are set around 10-20 percent below the retail price. CEMACO's retailing prices are reported to be somewhat lower than other supermarkets. The higher volumes bought by the Corporation are the main reason for this price difference.

The products imported by the Corporation are the normal supermarket processed products as well as fresh products like: apples, grapes, pears, oranges, lettuce, cabbage, carrots, tomatoes, cauliflower, broccoli, parsley bouquets, garlic, white potatoes, onions, sweet and hot peppers.

Fresh products bought from domestic production are: tomatoes, carrots, cabbages, white potatoes, bananas, sweet potatoes, cucumbers, suchini, sweet and hot peppers, plantains, dasheens, tannias, edoes, green-beans and onions. Domestic production is limited to a supply period of at the most 6 (six) weeks for tomatoes and cabbages (March-June), and a little bit longer for the other products. When domestic production is available, no imports are permitted. Prices of domestically produced fresh products are reported to be sometimes higher than imports.

5. The infrastructure owned by CEMACO is mainly a retail outlet of imported products (supermarket type):
 - Display with controlled temperature for fresh fruits and vegetables (shelf in poor conditions),
 - 2 (two) walking trailers (20 ft. each),
 - 1 (one) walking freezer (20 ft.),
 - 1 (one) reefer (refrigerated trailer) (40 ft.),
 - 1 (one) pickup van,
 - 1 (one) truck (6 tons.)
 - Building in the city that holds:

- supermarket
- selection, small warehouse and store area
- packing room (mainly for meat, very few ag-products)

6. The financial situation of CEMACO seems to be profitable, supported mainly by the supermarket activity (no detailed information was provided during the visit). No income tax is being paid by the Corporation for its activity. No tax nor duty exemption is granted to their imports of products retailed in the supermarket, exception made only for vegetable seed. A lack of financial capacity is indicated to be the main reason for not being able to renovate and upgrade the supermarket infrastructure.

Their main source of income is the supermarket business, specially the benefits derived by the imports of meats and poultry, effected from 5 (five) different suppliers from the U.S. and the U.K.). No funding from any international institution is reported.

7. Short- and medium-term policy of CEMACO.

- a. CEMACO does not intend to leave the supermarket business in the near future. Management is conscious that its activities will have to be directed more to benefit the local producer, but no plan on increasing its domestic purchases is envisioned. The lack of larger storage area for fresh products is its main constraint. Its purchases of domestically produced fresh products is also indicated to be limited to the "small volumes sold", no exports are actually being made. The lack of adequate transportation and ventilated crates is causing excessive handling of fresh products thus limiting purchases and affecting the quality of domestically produced vegetables.
- b. There is information on the supply and demand of different products. The crop forecasting information, generated by the Department of Agriculture, is used by the Supply Unit of the Ministry of Trade to restrict or permit imports. The published information focuses mainly on: the supply situation analysis, crop forecasting, market report with the range of wholesale and retail prices as well as the supply status (at CEMACO), the average wholesale and retail price comparison for the last two months, and the list of local fresh products bought by CEMACO.

On the other hand, this information is reported to be somewhat inaccurate and/or not timely, and in some cases not even complete in order to render a service to farmers, only to the potential buyers and/or importers (mainly CEMACO). This situation is expected to be redressed in the short term by improving the support given to the "Market News Committee", actually in the hands of the Agricultural Department of the Ministry of Agriculture. This Committee is formed by the following members:

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- 2 (two) from CEMACO,
 - 2 (two) from the Ministry of Agriculture,
 - 1 (one) from the Statistical Department,
 - 1 (one) from CARDI.
- c. CEMACO's supermarket activities are largely criticized by the agricultural community. Their lack of service to the producer is evident. No incentives exist from the Corporation to the producers to attract sales. Farmers will continue to sell directly to the different hotels and supermarkets and directly to the consumer through the local central market. They approach CEMACO as a last selling resource. There is no specific plan on CEMACO's part to redress this situation.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

1. Other Statutory Boards

The other statutory board in charge of marketing an agriculture commodity is the St. Kitts Sugar Manufacturing Corporation (SSMC). This corporation has the monopoly of the sugarcane and sugar business in the State where 2,000 to 2,500 people seem to be involved. The domestic distribution is made through wholesales to the different supermarkets and stores which are in charge of retailing the product to the end-users. Some sales are made directly to the consumers if they are willing to buy sugar by the 50 kg. bag.

- a. The name and number of the enabling legislation setting up the Corporation are:
- The St. Kitts Sugar Manufacturing Corporation Act, 1976. Act No. 38 of 1976. "An Act to provide for the establishment of a Corporation to be known as the St. Kitts Sugar Manufacturing Corporation,.."**
- b. SSMC is under sight of the Ministry of Agriculture but administered by the Board of Directors with the responsibility of following the policy outlined by the Minister of Agriculture.
- c. The Act stipulates that the Board be formed by minimum 5 (five) and maximum 8 (eight) members, including the Chairman and Deputy Chairman. The actual Board has 8 (eight) members and is composed by the following representations:
- Chairman, Minister within the Ministry of Finances,
 - Deputy Chairman, Financial Secretary of the Ministry of Finances,
 - Attorney General from the Legal Ministry,
 - Business sector,

- Farmer (former Sub-manager of SSMC),
- SSMC employee,
- Director of Agriculture of the Ministry of Agriculture, and
- SSMC's Managing Director.

The Chairman is appointed by the Governor with the advice of the Cabinet. The Minister of Agriculture appoints the Deputy Chairman as well as the other directors of the Board. The responsibilities to terminate the Chairman's and the other directors' appointments are also divided between the Governor and the Ministry of Agriculture respectively.

The appointment or reappointment of the Chairman is for a period of 6 (six) years while the other directors are appointed or reappointed for a period of three years.

- d. The functions of the Sugar Corporation, as stipulated by the Act under subsection (1) are:
- "(a) to carry on the business of manufacturing sugar and sugar cane products from sugarcane at the factory hitherto operated by the Basseterre Company*;
 - (b) to secure the efficient development of sugar manufacturing industry; and
 - (c) to sell and export sugar."

*The Basseterre Company mentioned in the Act is the St. Kitts (Basseterre) Sugar Factory, Limited. An English Company that was the former owner of the factory before the Government purchased their fixed assets under the responsibility of the National Agricultural Corporation (to be confirmed).

The Statutory functions of the SSMC are not very restrictive as it may seem from the above mentioned subsection because there is another subsection that stipulates:

"The functions of the Corporation shall include the carrying on of all such activities as may appear to the Corporation to be requisite advantageous or convenient for it to carry on for or in connection with the performance of its functions under subsection (1)." This part of the Act permits the Government through SSMC to control and monopolize the sugarcane production and manufacturing.

The sugarcane for the factory (practically all the sugarcane grown in the State) is being produced in Government's land. No lease is paid by SSMC for its use. Production of sugarcane is planned by SSMC according to the available land granted and/or allocated for this purpose by the Government. The best land is reported to be taken away from sugar production to be granted for other purposes like production of vegetables and/or other cash crops.

Another problem of the sugarcane production is hand-labor availability. Agriculture related jobs continue to experience a low social acceptance. This forces the Corporation to seek sugarcane cutters from St. Vincent and Guyana, 300 persons have been brought into St. Kitts for 1991. The salary rates are reported to be the same for imported hand-labor than for local cutters. Local competition for hand-labor is dominated by the construction sector where salaries are paid from 75 to 100 percent over the agricultural hand-labor. A non skill worker in the construction sector will be paid EC\$ 300 to 400 per week against a normal EC\$ 200 per week in agriculture. Cane cutters are paid EC\$ 12-13 per ton of sugarcane cut, the average cut is of 3 tons/day/cutter.

- e. The Government of St. Kitts and Nevis amended the Sugar Act in 1985, transferring and vesting under SSMC all the Assets and Liabilities of the National Agricultural Corporation which was dissolved then. Those fixed assets contributing to the sugar business operation are:
- Sugar mill and machinery,
 - railway network from the field to the factory and then to the port,
 - mobile (field) vehicles and mobile equipment: cane cutters (1/3 of the total production is by machine),
 - warehouse for around 10,000 M.T. of bulk sugar,
 - bagging unit, and
 - building with offices.
- f. The Sugar Corporation is reported to be in a financial crisis. The accumulated deficit at the end of 1989 was over EC\$ 90.6 million. The net loss for the same year amounts to over EC\$ 11.6 million and is absorbed as an unsecured overdraft with the National Bank. The financial crisis is reported to be caused mainly by:
- Low production volumes. Production level of 1991 (after Hurricane Hugo) is below 20,000 Tons while the break-even point is estimated between 28,000 and 30,000 Tons.
 - The lack of control over the price for exports. The latter has been stationary while production costs have increased constantly. SSMC has been struggling to reduce costs without success.
 - Organizational problems created by low quality of Management.
 - Lack of cash-flow that creates problems of productivity at the field and at the factory level.
- g. The short-term prospects to redress the financial crisis is particularly focused on a "Management Contract" with Booker & Tate. This contract should start by

the month of July 1991. A fix contract fee is paid to the private Company hoping to improve the efficiency of the whole operation.

The term of the contract is for 2 (two) years, during this time the contractor will determine and see if a turn-around is possible for the catastrophic financial situation of SSMC. Any decision on the future of the Corporation would be taken after these two years of private management.

Efficiency of the personnel is expected to improve as a result of the change in management. The uncertainty feeling that has demoralized the approximately 250 employees seems to be changing positively with the news of the management contract.

- h. No change is expected for 1992 on the conditions of sugar exports into the United Kingdom. The ACP agreement under the Sugar Protocol stipulates a fix price in "Eccus" (the EEC common currency) for sugar in all Europe. The price fluctuation experienced in the market are mainly a result of the variations of the exchange rate with the Eccu.

2. Public Sector - Supply Unit of the Ministry of Trade

- a. The Supply Unit is a Subdivision of the Ministry of Trade under direct responsibility of the Permanent Secretary. The activities of the Supply Unit were originally outlined by the External Trade Law, Chapter 338 of 1958. The Statutory Rules and Orders No. 26 of 1973 have updated the original mandates.
- b. The Supply Unit is responsible for granting import and export licenses based on the information and recommendations made by the Agricultural Department of the Ministry of Agriculture.
- c. The Supply Unit is the sole importer of bulk flour, rice, milk and fishpot wire (16 gauge). The flour and rice are imported in 100 and 110 lbs./bags every 3 (three) weeks and the evaporated milk every 21 days from Holland. Import licenses are granted to import rice and flour in small packages, but subject to a price control.
- d. The Government owns a big warehouse in the industrial area where the rice and flour are stored for further wholesale and retail distribution in the original containers, no repacking in smaller containers is being made. Price is set according to the purchased volumes. A reported 10 percent mark up on the landed cost is the base price for sales which permits to control and maintain domestic prices. Government authorities believe that if the private sector was in charge of marketing these products, prices would be at least 100 percent over the actual.

D. DIVERSIFICATION POLICIES

1. The Government of St. Kitts and Nevis is interested in increasing agricultural production. The land tenure problem is to be solved by granting long term leases to farmers of 35-40 years. An expected surplus of agricultural products that will have to be exported would result from these incentives.

A US\$ 700,000 diversification Plan is funded by UNDP and executed by FAO. It consists in diversifying agricultural production into vegetables (mainly cabbages, tomatoes and water melons) in order to reduce imports of these products.

2. The Government is also interested, through the same diversification Plan, in training farmers in the post harvest handling of the above mentioned fruits and vegetables, as well as in agricultural marketing practices. The other main concern is to organize the small farmers (3-5 acres) in cooperatives and/or other private groups.

The efforts made by CARDI, the Chinese Agricultural Program and the UNDP in St. Kitts and Nevis have to be integrated in order to obtain better results for the producer.

New trade tariffs will be applied in around 2 (two) months according to sources. The CARICOM and OECS originated imports will continue to be exempted. The originated products from other regions will suffer an important tariff increase (i.e., peas, actual tariff is around EC 15 cents/36 lbs., new tariff will increase this tariff to EC\$ 28.67/36 lbs.). This measure intended to increase regional trade will cause an important inflation on selling prices, specially for most of the OECS and CARICOM communities that rely highly on imported products that are not being produced in the region.

3. The Government is mostly interested to boost tourism, the development of the southern peninsula as a touristic haven is on the way, the new paved road is contributing to the expansion of the room availability by the construction of new hotels. A duty free shopping mall is being installed in St. Kitts. Joint efforts of the private and public sectors are made to attract tourism into the island through a well set publication.

E. STATISTICAL APPENDICES

Table E-1

- Gross Domestic Product by Economic Activity, at Factor Cost in Current Prices (EC\$ million) 1989-1990.
- Gross Domestic Product by Economic Activity, at Factor Cost in Constant Prices (EC\$ million) 1989-1990.

- Rate of Growth of Gross Domestic Product by Economic Activity at Factor Cost in Constant Prices. 1980-1990.
- Rate of Growth of Gross Domestic Product by Economic Activity at Factor Cost in Current Prices. 1980-1990.
- Percentage Contribution of Gross Domestic Product by Economical Activity, at Factor Cost in Current Prices. 1980-1990.
- Gross Domestic Product Deflators by Economic Activity, at Factor Cost. 1980-1990.
- Index of Gross Domestic Product by Economic Activity, at Factor Cost in Current Prices. 1980-1990.
- Index of Gross Domestic Product by Economic Activity, at Factor Cost in Constant Prices. 1980-1990.

Source: St. Kitts Statistics Division / OECS /EAS

Table E-2

- 1990 Vegetable Production Estimate (lbs) - St. Kitts

Source: Agricultural Department of the Ministry of Agriculture.

Tables E-3

- Value of Imports, Domestic Exports and Re-Exports. 1988-1989.
- Value of Imports by Groups, 1989. (CIF in EC\$).
- Imports by Sections of the S.I.T.C. Showing Percentages in Relation to the Value of Imports: 1985-1989.
- Exports by Section of the S.I.T.C. Showing Percentages in Relation to the Value of Exports: 1985-1989.
- Re-Exports by Section of the S.I.T.C. Showing Percentages in Relation to the Value of Re-Exports: 1985-1989.

Source: St. Kitts Statistics Division /OECS/EAS

TABLE E-1
ST. CHRISTOPHER AND NEVIS
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY

GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
IN CURRENT PRICES (EC\$ MILLION)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	16.51	13.83	20.31	16.19	19.22	16.44	22.87	25.94	28.05	27.65	29.12
Sugarcane	9.80	5.34	11.40	7.54	10.85	7.22	11.37	13.29	14.09	13.39	13.39
Crops (other)	2.23	2.45	2.28	1.70	1.46	1.68	3.93	4.49	5.02	4.74	5.68
Livestock	2.62	3.43	3.48	3.47	2.91	3.15	2.51	3.00	3.09	3.26	3.42
Forestry	0.09	0.11	0.12	0.12	0.13	0.16	0.18	0.20	0.23	0.25	0.27
Fishing	1.77	2.50	3.03	3.36	3.87	4.23	4.88	4.96	5.62	6.01	6.36
Mining & Quarrying	0.32	0.33	0.41	0.45	0.38	0.45	0.50	0.64	1.37	1.54	1.67
Manufacturing	15.74	17.88	18.66	17.55	22.62	21.94	32.83	35.37	44.25	45.79	46.57
Sugar	7.87	9.16	9.00	7.22	9.59	7.51	10.35	9.73	10.96	8.75	5.36
Other	7.87	8.72	9.66	10.33	13.03	14.43	22.48	25.64	33.29	37.04	41.21
Electricity & Water	0.88	1.11	1.43	1.36	1.60	1.78	4.40	2.96	2.71	3.56	3.91
Construction	10.58	10.85	13.60	14.96	12.82	15.05	16.68	21.32	34.16	38.38	41.75
Wholesale & Retail Trade	12.99	14.09	16.53	18.27	20.69	23.95	27.96	32.99	35.36	48.33	53.39
Hotels & Restaurants	4.49	5.39	4.30	4.35	7.35	11.82	16.15	21.73	21.93	24.06	27.45
Transport	6.54	8.89	10.35	11.63	13.65	14.98	17.41	19.98	22.03	24.01	25.95
Road Transport	5.36	7.69	8.66	9.11	9.48	10.13	11.47	11.87	12.73	13.37	15.31
Sea Transport	0.62	0.76	1.19	2.00	3.58	4.17	4.85	6.17	6.74	7.64	7.52
Air Transport	0.56	0.44	0.50	0.52	0.59	0.68	1.09	1.94	2.56	3.00	3.65
Communications	3.46	6.53	7.10	4.79	5.89	6.16	8.88	9.84	18.48	21.40	23.25
Banks & Insurance	5.25	5.84	8.56	8.18	11.09	11.89	19.29	17.18	22.50	28.09	33.60
Real Estate & Housing	6.66	7.48	7.82	8.13	8.45	8.98	9.52	10.00	10.61	11.44	12.28
Government Services	19.20	26.64	28.55	29.93	36.08	37.33	41.23	44.64	49.54	56.21	57.90
Other Services	5.20	6.57	7.30	7.83	8.40	9.01	9.65	10.13	10.53	11.42	12.26
Less Imputed Service Charge	4.36	3.99	6.18	7.13	8.92	8.02	13.16	12.94	16.80	22.42	25.42
TOTAL	103.46	121.44	138.74	136.49	159.32	171.76	214.21	239.78	284.72	319.46	339.82
GROWTH RATE	17.76	17.38	14.25	-1.62	16.73	7.81	24.71	11.94	18.74	12.20	6.37

SOURCE: ST. KITTS STATISTICS DIVISION / OECS/EAS
[1990 Data Provisional]
April 1991

TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
 IN CONSTANT PRICES (ECS MILLION)

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	13.44	14.09	14.09	11.50	11.99	11.72	11.36	11.64	12.28	11.73	10.11
Sugarcane	8.03	7.97	8.25	6.52	7.05	6.21	6.15	6.15	6.40	5.96	3.98
Crops (other)	1.99	2.05	1.74	1.25	1.17	1.34	1.36	1.50	1.72	1.78	1.92
Livestock	2.21	2.54	2.49	2.11	2.06	2.38	1.79	1.88	1.94	1.99	2.09
Forestry	0.07	0.07	0.08	0.08	0.08	0.09	0.10	0.11	0.12	0.13	0.14
Fishing	1.14	1.46	1.53	1.54	1.63	1.70	1.96	2.00	2.10	1.87	1.98
Mining & Quarrying	0.23	0.24	0.28	0.31	0.26	0.29	0.32	0.37	0.69	0.73	0.78
Manufacturing	13.53	12.15	13.17	11.72	13.15	12.44	13.46	13.23	13.68	13.85	12.16
Sugar	7.34	6.83	7.59	5.92	6.54	5.67	6.01	5.33	5.39	5.23	3.20
Other	6.19	5.32	5.58	5.80	6.61	6.77	7.45	7.90	8.29	8.62	8.96
Electricity & Water	0.88	0.94	1.00	1.01	1.07	1.16	1.27	1.36	1.50	1.54	1.65
Construction	7.72	7.99	9.49	10.44	8.72	9.81	10.30	12.47	17.20	18.14	19.59
Wholesale & Retail Trade	9.36	9.20	10.18	10.95	12.29	13.81	14.50	15.81	16.91	21.93	23.25
Hotels & Restaurants	2.61	2.91	2.50	2.48	3.68	4.64	6.22	7.59	7.66	7.56	7.91
Transport	4.31	4.85	5.03	5.13	5.39	5.79	6.35	7.03	7.52	7.97	8.44
Road Transport	3.14	3.57	3.75	3.81	3.96	4.19	4.36	4.74	5.07	5.32	5.74
Sea Transport	0.47	0.52	0.55	0.58	0.61	0.68	0.90	1.04	1.10	1.21	1.19
Air Transport	0.70	0.76	0.73	0.74	0.82	0.92	1.09	1.25	1.35	1.44	1.51
Communications	2.57	4.44	4.38	4.51	5.09	5.67	7.39	8.19	11.53	13.35	14.50
Banks & Insurance	4.28	4.19	4.96	5.04	5.56	5.84	6.42	6.74	7.08	7.75	9.28
Real Estate & Housing	5.50	5.57	5.62	5.71	5.80	6.03	6.21	6.33	6.46	6.62	6.82
Government Services	15.69	16.58	17.75	18.50	22.40	23.52	23.33	24.39	24.64	25.59	26.35
Other Services	3.75	4.29	4.50	4.72	4.95	5.20	5.46	5.68	5.51	5.68	5.85
Less Imputed Service Charge	3.59	3.06	3.25	3.30	3.63	3.81	4.19	4.40	4.83	6.02	6.83
TOTAL	80.28	84.38	89.70	88.72	96.72	102.11	108.40	116.43	127.83	136.42	139.86
GROWTH RATE	3.92	5.11	6.30	-1.09	9.02	5.57	6.16	7.41	9.79	6.72	2.52

SOURCE: ST. KITTS STATISTICS DIVISION / OECS/EAS
 [1990 Data Provisional]
 April 1991

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TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
RATE OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS
 RATE OF GROWTH OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY
 AT FACTOR COST IN CONSTANT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	-9.56	4.84	0.00	-18.38	4.26	-2.25	-3.07	2.46	5.50	-4.48	-13.81
Sugarcane	-11.47	-0.75	3.51	-20.97	8.13	-11.91	-0.97	0.00	4.07	-6.88	-33.22
Crops (other)	-4.78	3.02	-15.12	-28.16	-6.40	14.53	1.49	10.29	14.67	3.49	7.87
Livestock	-8.30	14.93	-1.97	-15.26	-2.37	15.53	-24.79	5.03	3.19	2.58	5.03
Forestry	16.67	0.00	14.29	0.00	0.00	12.50	11.11	10.00	9.09	8.33	7.69
Fishing	-7.32	28.07	4.79	0.65	5.84	4.29	15.29	2.04	5.00	-10.95	5.88
Mining & Quarrying	27.78	4.35	16.67	10.71	-16.13	11.54	10.34	15.62	86.49	5.80	6.85
Manufacturing	1.65	-10.20	8.40	-11.01	12.20	-5.40	8.20	-1.71	3.40	1.24	-12.20
Sugar	-12.51	-6.95	11.13	-22.00	10.47	-13.30	6.00	-11.31	1.13	-2.97	-38.81
Other	25.81	-14.05	4.89	3.94	13.97	2.42	10.04	6.04	4.94	3.98	3.94
Electricity & Water	18.92	6.82	6.38	1.00	5.94	8.41	9.48	7.09	10.29	2.67	7.14
Construction	26.77	3.50	18.77	10.01	-16.48	12.50	4.99	21.07	37.93	5.47	7.99
Wholesale & Retail Trade	12.50	-1.71	10.65	7.56	12.24	12.37	5.00	9.03	6.96	29.69	6.02
Hotels & Restaurants	-6.12	11.49	-14.09	-0.80	48.39	25.09	34.05	22.03	0.92	-1.31	4.63
Transport	9.39	12.53	3.71	1.99	5.07	7.42	9.67	10.71	6.97	5.98	5.90
Road Transport	11.35	13.69	5.04	1.60	3.94	5.81	4.06	8.72	6.96	4.93	7.89
Sea Transport	11.90	10.64	5.77	5.45	5.17	11.48	32.35	15.56	5.77	10.00	-1.65
Air Transport	0.00	8.57	-3.95	1.37	10.81	12.20	18.48	14.68	8.00	6.67	4.86
Communications	9.36	72.76	-1.35	2.97	12.86	11.39	30.34	10.83	40.78	15.78	8.61
Banks & Insurance	5.42	-2.10	18.38	1.61	10.32	5.04	9.93	4.98	5.04	9.46	19.74
Real Estate & Housing	1.85	1.27	0.90	1.60	1.58	3.97	2.99	1.93	2.05	2.48	3.02
Government Services	4.95	5.67	7.06	4.23	21.08	5.00	-0.81	4.54	1.03	3.86	2.97
Other Services	11.28	14.40	4.90	4.89	4.87	5.05	5.00	4.03	-2.99	3.09	2.99
Less Imputed Service Charge	15.81	-14.76	6.21	1.54	10.00	4.96	9.97	5.01	9.77	24.64	13.46
TOTAL	3.92	5.11	6.30	-1.09	9.02	5.57	4.14	7.41	9.79	6.72	2.52

TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
PERCENTAGE CONTRIBUTION OF
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

PERCENTAGE CONTRIBUTION OF
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
IN CURRENT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	15.96	11.39	14.64	11.86	12.06	9.57	10.68	10.82	9.85	8.66	8.57
Sugarcane	9.47	4.40	8.22	5.52	6.81	4.20	5.31	5.54	4.95	4.19	3.94
Crops (other)	2.16	2.02	1.64	1.25	0.92	0.98	1.83	1.87	1.76	1.48	1.67
Livestock	2.53	2.82	2.51	2.54	1.83	1.83	1.17	1.25	1.09	1.02	1.01
Forestry	0.09	0.09	0.09	0.09	0.08	0.09	0.08	0.08	0.08	0.08	0.08
Fishing	1.71	2.06	2.18	2.46	2.43	2.46	2.28	2.07	1.97	1.88	1.87
Mining & Quarrying	0.31	0.27	0.30	0.33	0.24	0.26	0.23	0.27	0.48	0.48	0.49
Manufacturing	15.21	14.72	13.45	12.86	14.20	12.77	15.33	14.75	15.54	14.33	13.70
Sugar	7.61	7.54	6.49	5.29	6.02	4.37	4.83	4.06	3.85	2.74	1.58
Other	7.61	7.18	6.96	7.57	8.18	8.40	10.49	10.69	11.69	11.59	12.13
Electricity & Water	0.85	0.91	1.03	1.00	1.00	1.04	2.05	1.23	0.95	1.11	1.15
Construction	10.23	8.93	9.80	10.96	8.05	8.76	7.79	8.89	12.00	12.01	12.29
Wholesale & Retail Trade	12.56	11.60	11.91	13.39	12.99	13.94	13.05	13.76	12.42	15.13	15.16
Hotels & Restaurants	4.34	4.44	3.10	3.19	4.61	6.88	7.54	9.06	7.70	7.53	8.08
Transport	6.32	7.32	7.46	8.52	8.57	8.72	8.13	8.33	7.74	7.52	7.64
Road Transport	5.18	6.33	6.24	6.67	5.95	5.90	5.35	4.95	4.47	4.19	4.35
Sea Transport	0.60	0.63	0.86	1.47	2.25	2.43	2.26	2.57	2.37	2.39	2.21
Air Transport	0.54	0.36	0.36	0.38	0.37	0.40	0.51	0.81	0.90	0.94	1.07
Communications	3.34	5.38	5.12	3.51	3.70	3.59	4.15	4.10	6.49	6.70	6.84
Banks & Insurance	5.07	4.81	6.17	5.99	6.96	6.92	9.01	7.16	7.90	8.79	9.89
Real Estate & Housing	6.44	6.16	5.64	5.96	5.30	5.23	4.44	4.17	3.73	3.58	3.61
Government Services	18.56	21.94	20.58	21.93	22.65	21.73	19.25	18.62	17.40	17.60	17.04
Other Services	5.03	5.41	5.26	5.74	5.27	5.25	4.50	4.22	3.70	3.57	3.61
Less Imputed Service Charge	4.21	3.29	4.45	5.22	5.60	4.67	6.14	5.40	5.90	7.02	8.07
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

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TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
PERCENTAGE CONTRIBUTION OF
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS
 PERCENTAGE CONTRIBUTION OF
 GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
 IN CONSTANT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	16.74	16.70	15.71	12.96	12.40	11.48	10.48	10.00	9.61	8.60	7.23
Sugarcane	10.00	9.45	9.20	7.35	7.29	6.08	5.67	5.28	5.01	4.37	2.85
Crops (other)	2.48	2.43	1.94	1.41	1.21	1.31	1.25	1.29	1.35	1.30	1.37
Livestock	2.75	3.01	2.78	2.38	2.13	2.33	1.65	1.61	1.52	1.46	1.49
Forestry	0.09	0.08	0.09	0.09	0.08	0.09	0.09	0.09	0.09	0.10	0.10
Fishing	1.42	1.73	1.71	1.74	1.69	1.66	1.81	1.72	1.64	1.37	1.42
Mining & Quarrying	0.29	0.28	0.31	0.35	0.27	0.28	0.30	0.32	0.54	0.54	0.56
Manufacturing	16.85	14.40	14.68	13.21	13.60	12.18	12.42	11.36	10.70	10.15	8.69
Sugar	9.14	8.09	8.46	6.67	6.76	5.55	5.54	4.58	4.22	3.83	2.29
Other	7.71	6.30	6.22	6.54	6.83	6.63	6.87	6.79	6.49	6.32	6.41
Electricity & Water	1.10	1.11	1.11	1.14	1.11	1.14	1.17	1.17	1.17	1.13	1.18
Construction	9.62	9.47	10.58	11.77	9.02	9.61	9.50	10.71	13.46	13.30	14.01
Wholesale & Retail Trade	11.66	10.90	11.35	12.34	12.71	13.52	13.38	13.58	13.23	16.08	16.62
Hotels & Restaurants	3.25	3.45	2.79	2.80	3.80	4.54	5.74	6.52	5.99	5.54	5.66
Transport	5.37	5.75	5.61	5.78	5.57	5.67	5.86	6.04	5.88	5.84	6.03
Road Transport	3.91	4.23	4.18	4.29	4.09	4.10	4.02	4.07	3.97	3.90	4.10
Sea Transport	0.59	0.62	0.61	0.65	0.63	0.67	0.83	0.89	0.86	0.89	0.85
Air Transport	0.87	0.90	0.81	0.83	0.85	0.90	1.01	1.07	1.06	1.06	1.08
Communications	3.20	5.26	4.88	5.08	5.26	5.55	6.82	7.03	9.02	9.79	10.37
Banks & Insurance	5.33	4.97	5.53	5.68	5.75	5.72	5.92	5.79	5.54	5.68	6.64
Real Estate & Housing	6.85	6.60	6.27	6.44	6.00	5.91	5.73	5.44	5.05	4.85	4.88
Government Services	19.54	19.65	19.79	20.85	23.16	23.03	21.52	20.95	19.28	18.76	18.84
Other Services	4.67	5.08	5.02	5.32	5.12	5.09	5.04	4.88	4.31	4.16	4.18
Less Imputed Service Charge	4.47	3.63	3.62	3.72	3.75	3.73	3.87	3.78	3.78	4.41	4.88
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

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TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
RATE OF GROWTH OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

RATE OF GROWTH OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY
AT FACTOR COST IN CURRENT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	21.04	-16.23	46.85	-20.29	18.72	-14.46	39.11	13.42	8.13	-1.43	5.32
Sugarcane	35.17	-45.51	113.48	-33.86	43.90	-33.46	57.48	16.89	6.02	-4.97	0.00
Crops (other)	-2.19	9.87	-6.94	-25.44	-14.12	15.07	133.93	14.25	11.80	-5.58	19.83
Livestock	3.56	30.92	1.46	-0.29	-16.14	8.25	-20.32	19.52	3.00	5.50	4.91
Forestry	12.50	22.22	9.09	0.00	8.33	23.08	12.50	11.11	15.00	8.70	8.00
Fishing	18.00	41.24	21.20	10.89	15.18	9.30	15.37	1.64	13.31	6.94	5.82
Mining & Quarrying	33.33	3.13	24.24	9.76	-15.56	18.42	11.11	28.00	114.06	12.41	8.44
Manufacturing	23.06	13.60	4.36	-5.95	28.89	-3.01	49.64	7.74	25.11	3.48	1.70
Sugar	9.00	16.39	-1.75	-19.78	32.83	-21.69	37.82	-5.99	12.64	-20.16	-38.74
Other	41.29	10.80	10.78	6.94	26.14	10.74	55.79	14.06	29.84	11.26	11.26
Electricity & Water	8.64	26.14	28.83	-4.90	17.65	11.25	147.19	-32.73	-8.45	31.37	9.83
Construction	30.30	2.55	25.35	10.00	-14.30	17.39	10.83	27.82	60.23	12.35	8.78
Wholesale & Retail Trade	32.55	8.47	17.32	10.53	13.25	15.76	16.74	17.99	7.18	36.68	6.62
Hotels & Restaurants	-6.26	20.04	-20.22	1.16	68.97	60.82	36.63	34.55	0.92	9.71	14.09
Transport	29.25	35.93	16.42	12.37	17.37	9.74	16.22	14.76	10.26	8.99	8.08
Road Transport	30.41	43.47	12.61	5.20	4.06	6.86	13.23	3.49	7.25	5.03	10.55
Sea Transport	24.00	22.58	56.58	68.07	79.00	16.48	16.31	27.22	9.24	13.35	-1.57
Air Transport	24.44	-21.43	13.64	4.00	13.46	15.25	60.29	77.98	31.96	17.19	21.67
Communications	24.46	88.73	8.73	-32.54	22.96	4.58	44.16	10.81	87.80	15.80	8.64
Banks & Insurance	14.63	11.24	46.58	-4.44	35.57	7.21	62.24	-10.94	30.97	24.84	19.62
Real Estate & Housing	2.30	12.31	4.55	3.96	3.94	6.27	6.01	5.04	6.10	7.82	7.34
Government Services	5.21	38.75	7.17	4.83	20.55	3.46	10.45	8.27	10.98	13.46	3.01
Other Services	30.98	26.35	11.11	7.26	7.28	7.26	7.10	4.97	3.95	8.45	7.36
Less Imputed Service Charge	25.29	-8.49	54.89	15.37	25.11	-10.09	64.09	-1.67	29.83	33.45	22.30
TOTAL	17.76	17.38	14.25	-1.62	16.73	7.81	24.71	11.94	18.74	12.20	6.37

TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
RATE OF GROWTH OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

RATE OF GROWTH OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY
AT FACTOR COST IN CONSTANT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	-9.56	4.84	0.00	-18.38	4.26	-2.25	-3.07	2.46	5.50	-4.48	-13.81
Sugarcane	-11.47	-0.75	3.51	-20.97	8.13	-11.91	-0.97	0.00	4.07	-6.88	-33.22
Crops (other)	-4.78	3.02	-15.12	-28.16	-6.40	14.53	1.49	10.29	14.67	3.49	7.87
Livestock	-8.30	14.93	-1.97	-15.26	-2.37	15.53	-24.79	5.03	3.19	2.58	5.03
Forestry	16.67	0.00	14.29	0.00	0.00	12.50	11.11	10.00	9.09	8.33	7.69
Fishing	-7.32	28.07	4.79	0.65	5.84	4.29	15.29	2.04	5.00	-10.95	5.88
Mining & Quarrying	27.78	4.35	16.67	10.71	-16.13	11.54	10.34	15.62	86.49	5.80	6.85
Manufacturing	1.65	-10.20	8.40	-11.01	12.20	-5.40	8.20	-1.71	3.40	1.24	-12.20
Sugar	-12.51	-6.95	11.13	-22.00	10.47	-13.30	6.00	-11.31	1.13	-2.97	-38.81
Other	25.81	-14.05	4.89	3.94	13.97	2.42	10.04	6.04	4.94	3.98	3.94
Electricity & Water	18.92	6.82	6.38	1.00	5.94	8.41	9.48	7.09	10.29	2.67	7.14
Construction	26.77	3.50	18.77	10.01	-16.48	12.50	4.99	21.07	37.93	5.47	7.99
Wholesale & Retail Trade	12.50	-1.71	10.65	7.56	12.24	12.37	5.00	9.03	6.96	29.69	6.02
Hotels & Restaurants	-6.12	11.49	-14.09	-0.80	48.39	26.09	34.05	22.03	0.92	-1.31	4.63
Transport	9.39	12.53	3.71	1.99	5.07	7.42	9.67	10.71	6.97	5.98	5.90
Road Transport	11.35	13.69	5.04	1.60	3.94	5.81	4.06	8.72	6.96	4.93	7.89
Sea Transport	11.90	10.64	5.77	5.45	5.17	11.48	32.35	15.56	5.77	10.00	-1.65
Air Transport	0.00	8.57	-3.95	1.37	10.81	12.20	18.48	14.68	8.00	6.67	4.86
Communications	9.36	72.76	-1.35	2.97	12.86	11.39	30.34	10.83	40.78	15.78	8.61
Banks & Insurance	5.42	-2.10	18.38	1.61	10.32	5.04	9.93	4.98	5.04	9.46	19.74
Real Estate & Housing	1.85	1.27	0.90	1.60	1.58	3.97	2.99	1.93	2.05	2.48	3.02
Government Services	4.95	5.67	7.06	4.23	21.08	5.00	-0.81	4.54	1.03	3.86	2.97
Other Services	11.28	14.40	4.90	4.89	4.87	5.05	5.00	4.03	-2.99	3.09	2.99
Less Imputed Service Charge	15.81	-14.76	6.21	1.54	10.00	4.96	9.97	5.01	9.77	24.64	13.46
TOTAL	3.92	5.11	6.30	-1.09	9.02	5.57	6.16	7.41	9.79	6.72	2.52

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TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
RATE OF GROWTH OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

GROSS DOMESTIC PRODUCT DEFLATORS BY ECONOMIC ACTIVITY, AT FACTOR COST

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	122.84	98.15	144.14	140.78	166.30	140.27	201.32	222.85	228.42	235.72	288.03
Sugarcane	122.04	67.00	138.18	115.64	153.90	116.26	184.88	216.10	220.16	224.66	336.43
Crops (other)	112.06	119.51	131.03	136.00	124.79	125.37	288.97	299.33	291.86	266.29	295.83
Livestock	118.55	135.04	139.76	164.45	141.26	132.35	140.22	159.57	159.28	163.82	163.64
Forestry	128.57	157.14	150.00	150.00	162.50	177.78	180.00	181.82	191.67	192.31	192.86
Fishing	155.26	171.23	198.04	218.18	237.42	248.82	248.98	248.00	267.62	321.39	321.21
Mining & Quarrying	139.13	137.50	146.43	145.16	146.15	155.17	156.25	172.97	198.55	210.96	214.10
Manufacturing	116.33	147.16	141.69	149.74	172.02	176.37	243.91	267.35	323.46	330.61	382.98
Sugar	107.22	134.11	118.58	121.96	146.64	132.45	172.21	182.55	203.34	167.30	167.50
Other	127.14	163.91	173.12	178.10	197.13	213.15	301.74	324.56	401.57	429.70	459.93
Electricity & Water	100.00	118.09	143.00	134.65	149.53	153.45	346.46	217.65	180.67	231.17	236.97
Construction	137.05	135.79	143.31	143.30	147.02	153.41	161.94	170.97	198.60	211.58	213.12
Wholesale & Retail Trade	138.78	153.15	162.38	166.85	168.35	173.43	192.83	208.67	209.11	220.38	221.63
Hotels & Restaurants	172.03	185.22	172.00	175.40	199.73	254.74	259.65	286.30	286.29	318.25	347.03
Transport	151.74	183.30	205.77	226.71	253.25	258.72	274.17	284.21	292.95	301.25	307.46
Road Transport	170.70	215.41	230.93	239.11	239.39	241.77	263.07	250.42	251.08	251.32	257.49
Sea Transport	131.91	146.15	216.36	344.83	586.89	613.24	538.89	593.27	612.73	631.40	631.93
Air Transport	80.00	57.89	68.49	70.27	71.95	73.91	100.00	155.20	189.63	208.33	241.72
Communications	134.63	147.07	162.10	106.21	115.72	108.64	120.16	120.15	160.28	160.30	160.34
Banks & Insurance	122.66	139.38	172.58	162.30	199.46	203.60	300.47	254.90	317.80	362.45	362.07
Real Estate & Housing	121.09	134.29	139.15	142.38	145.69	148.92	153.30	157.98	164.24	172.81	180.06
Government Services	122.37	160.68	160.85	161.78	161.07	158.72	176.73	183.03	201.06	219.66	219.73
Other Services	138.67	153.15	162.22	165.89	169.70	173.27	176.74	178.35	191.11	201.06	209.57
Less Imputed Service Charge	121.45	130.39	190.15	216.06	245.73	210.50	314.08	294.09	347.83	372.43	401.46
TOTAL	128.87	143.92	154.67	153.84	164.72	168.21	197.61	205.94	222.73	234.17	242.97

TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
INDEX OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

INDEX OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
IN CURRENT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990

Agriculture	126.03	105.57	155.04	123.59	146.72	125.50	174.58	198.02	214.12	211.07	222.29
Sugarcane	117.93	64.26	137.18	90.73	130.57	86.88	136.82	159.93	169.55	161.13	161.13
Crops (other)	157.04	172.54	160.56	119.72	102.82	118.31	276.76	316.20	353.52	333.80	400.00
Livestock	109.62	143.51	145.61	145.19	121.76	131.80	105.02	125.52	129.29	136.40	143.10
Forestry	180.00	220.00	240.00	240.00	260.00	320.00	360.00	400.00	460.00	500.00	540.00
Fishing	190.32	268.82	325.81	361.29	416.13	454.84	524.73	533.33	604.30	646.24	683.87
Mining & Quarrying	160.00	165.00	205.00	225.00	190.00	225.00	250.00	320.00	685.00	770.00	835.00
Manufacturing	125.52	142.58	148.80	139.95	180.38	174.96	261.80	282.06	352.87	365.15	371.37
Sugar	91.51	106.51	104.65	83.95	111.51	87.33	120.35	113.14	127.44	101.74	62.33
Other	199.75	221.32	245.18	262.18	330.71	366.24	570.56	650.76	844.92	940.10	1045.94
Electricity & Water	144.26	181.97	234.43	222.95	262.30	291.80	721.31	485.25	444.26	583.61	640.98
Construction	160.55	164.64	206.37	227.01	194.54	228.38	253.11	323.52	518.36	582.40	633.54
Wholesale & Retail Trade	185.31	201.00	235.81	260.63	295.15	341.65	398.86	470.61	504.42	689.44	735.09
Hotels & Restaurants	316.20	379.58	302.82	306.34	517.61	832.39	1137.32	1530.28	1544.37	1694.37	1935.10
Transport	171.65	233.33	271.65	305.25	358.27	393.18	456.96	524.41	578.22	630.18	681.10
Road Transport	184.83	265.17	298.62	314.14	326.90	349.31	395.52	409.31	438.97	461.03	509.66
Sea Transport	151.22	185.37	290.24	487.80	873.17	1017.07	1182.93	1504.88	1643.90	1863.41	1834.15
Air Transport	112.00	88.00	100.00	104.00	118.00	136.00	218.00	388.00	512.00	600.00	730.00
Communications	168.78	318.54	346.34	233.66	287.32	300.49	433.17	480.00	901.46	1043.90	1134.15
Banks & Insurance	138.52	154.09	225.86	215.83	292.61	313.72	508.97	453.30	593.67	741.16	886.54
Real Estate & Housing	126.62	142.21	148.67	154.56	160.65	170.72	180.99	190.11	201.71	217.49	233.46
Government Services	163.40	226.72	242.98	254.72	307.06	317.70	350.89	379.91	421.62	478.38	492.77
Other Services	146.48	185.07	205.63	220.56	236.62	253.80	271.83	285.35	296.62	321.69	345.35
Less Imputed Service Charge	175.81	160.89	249.19	287.50	359.68	323.39	530.65	521.77	677.42	904.03	1105.65
TOTAL	149.51	175.49	200.49	197.24	230.23	248.21	309.55	346.50	411.45	461.65	491.07

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TABLE E-1 (continued)
ST. CHRISTOPHER AND NEVIS
INDEX OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY

ST. CHRISTOPHER AND NEVIS

INDEX OF GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY, AT FACTOR COST
 IN CONSTANT PRICES

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
	----	----	----	----	----	----	----	----	----	----	----
Agriculture	102.60	107.56	107.56	87.79	91.53	89.47	86.72	88.85	93.74	89.54	77.18
Sugarcane	96.63	95.91	99.28	78.46	84.84	74.73	74.01	74.01	77.02	71.72	47.89
Crops (other)	140.14	144.37	122.54	88.03	82.39	94.37	95.77	105.63	121.13	125.35	135.21
Livestock	92.47	106.28	104.18	88.28	86.19	99.58	74.90	78.66	81.17	83.26	87.45
Forestry	140.00	140.00	160.00	160.00	160.00	180.00	200.00	220.00	240.00	260.00	280.00
Fishing	122.58	156.99	164.52	165.59	175.27	182.80	210.75	215.05	225.81	201.08	212.90
Mining & Quarrying	115.00	120.00	140.00	155.00	130.00	145.00	160.00	185.00	345.00	365.00	390.00
Manufacturing	107.89	96.89	105.02	93.46	104.86	99.20	107.34	105.50	109.09	110.45	96.97
Sugar	85.35	79.42	88.26	68.84	76.05	65.93	69.88	61.98	62.67	60.81	37.21
Other	157.11	135.03	141.62	147.21	167.77	171.83	189.09	200.51	210.41	218.78	227.41
Electricity & Water	144.26	154.10	163.93	165.57	175.41	190.16	208.20	222.95	245.90	252.46	270.49
Construction	117.15	121.24	144.01	158.42	132.32	148.86	156.30	189.23	261.00	275.27	297.27
Wholesale & Retail Trade	133.52	131.24	145.22	156.21	175.32	197.00	206.85	225.53	241.23	312.84	331.67
Hotels & Restaurants	183.80	204.93	176.06	174.65	259.15	326.76	438.03	534.51	539.44	532.39	557.04
Transport	113.12	127.30	132.02	134.65	141.47	151.97	166.67	184.51	197.38	209.19	221.52
Road Transport	108.28	123.10	129.31	131.38	136.55	144.48	150.34	163.45	174.83	183.45	197.93
Sea Transport	114.63	126.83	134.15	141.46	148.78	165.85	219.51	253.66	268.27	295.12	290.24
Air Transport	140.00	152.00	146.00	148.00	164.00	184.00	218.00	250.00	270.00	288.00	302.00
Communications	125.37	216.59	213.66	220.00	248.29	276.59	360.49	399.51	562.44	651.22	707.32
Banks & Insurance	112.93	110.55	130.87	132.98	146.70	154.09	169.39	177.84	186.81	204.49	244.85
Real Estate & Housing	104.56	105.89	106.84	108.56	110.27	114.64	118.06	120.34	122.81	125.86	129.66
Government Services	133.53	141.11	151.06	157.45	190.64	200.17	198.55	207.57	209.70	217.79	224.26
Other Services	105.63	120.85	126.76	132.96	139.44	146.48	153.80	160.00	155.21	160.00	164.79
Less Imputed Service Charge	144.76	123.39	131.05	133.06	146.37	153.63	168.95	177.42	194.76	242.74	275.40
TOTAL	116.01	121.94	129.62	128.21	139.77	147.56	156.65	168.25	184.73	197.14	202.11

TABLE E-2
1990 VEGETABLE PRODUCTION ESTIMATE (LBS)
ST. KITTS

	JAN	FEB	MARCH	APRIL	MAY	JUNE	Est. Mthly Demand	Total Prod'n	Est. Demand
Tomato	33500	12500	18550	11150	22600	5000	18000	103300	108000
Cabbage	11000	10000	6600	1000	1000	1000	15000	30600	90000
S. Pepper	1000	4850	3400	2000	2000	2000	5000	15250	30000
Carrot	na	na	5000	20000	15000	15000	15000	55000	90000
W. Potato		20000	370000	210000	50000	20000	100000	670000	600000
Onion		2000	4000	3000			40000	9000	240000

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Table 3. 1989 and 1990 January to June Estimated Vegetable Production (lbs)

	1989	1990
Tomato	118000	103300
Cabbage	97000	30600
S. Pepper	14900	15250
Carrot	64500	55000
W. Potato	660000	670000

1992

TABLE E-3
VALUE OF IMPORTS, DOMESTIC EXPORTS AND RE-EXPORTS

DIVISION S.I.T.C.(R), 1988 - 1989

DIVISION / /COMMODITIES	IMPORTS (c.i.f.)		DOMESTIC EXPORTS (f.o.b)		RE - EXPORTS (f.o.b)	
	1988	1989	1988	1989	1988	1989
0 FOOD AND LIVE ANIMALS	39,185,455	40,490,587	27,568,281	31,571,328	45,419	18,610
00 Live animals chiefly for food	64,959	91,634	135,615	75,105	-	-
01 Meat and meat preparations	9,509,855	9,594,302	54,600	15,373	2,221	2,290
02 Dairy products and eggs	4,713,188	4,961,511	6,102	-	2,171	4,315
03 Fish and fish preparations	2,530,228	2,309,725	531,268	324,497	18,031	2,865
04 Cereal and cereal preparations	7,618,387	8,652,950	-	39,253	18,650	-
05 Fruits and vegetables	6,612,662	6,578,161	86,881	55,354	3,865	7,100
06 Sugar, sugar preparations	1,052,206	1,433,611	23,733,896	27,524,690	-	-
07 Coffee, tea, cocoa, spices and manufacturers	623,687	729,889	225	30	250	30
08 Feeding stuff for animals	1,807,120	1,843,236	40	-	1,455	397
09 Miscellaneous food preparations	4,653,163	4,295,548	3,019,654	3,537,026	776	1,613
1 BEVERAGES AND TOBACCO	6,677,999	7,344,867	3,050,796	3,012,784	7,344	2,499
11 Beverages	5,686,157	6,437,314	3,050,796	3,012,784	7,344	2,499
12 Tobacco and manufactures of	991,842	907,553	-	-	-	-
2 CRUDE MATERIALS, INEDIBLE EXCEPT FUELS	4,537,301	5,263,576	400,009	186,044	48,290	4,272
21 Hides, skin, and furskin, undressed	-	250	1,855	690	-	-
22 Oil seeds, oil nuts and oil kernels	1,877	5,569	65,314	46,032	-	-
23 Crude rubber (incl. synthetic and reclaimed)	698	629	-	-	-	-
24 Wood, lumber and cork	3,591,661	4,281,238	210	2,351	44,794	3,012
25 Pulp and waste paper	764	1,428	-	-	-	-

TABLE E-3 (continued)
VALUE OF IMPORTS BY GROUPS, 1989

VALUE OF IMPORTS BY GROUPS, 1989

(Value C.I.F. in E.C. Dollars)

S.I.T.C GROUP	COMMODITY	IMPORTS	DOMESTIC EXPORTS	RE - EXPORTS
001	Live animals	91,634	75,105	0
011	Meat, fresh, chilled or frozen	6,549,173	15,373	1,500
012	Meat, dried, salted or smoked whether or not in airtight containers	577,386	-	658
014	Meat and edible meat offals, prepared or preserved n.e.s. fish extracts	2,467,743	-	132
022	Milk and cream	3,362,584	-	2,137
023	Butter	192,587	0	216
024	Cheese and curd	1,353,557	-	1,962
025	Eggs, birds' and egg yolks, fresh, dried or otherwise preserved, sweetened or not	52,783	0	-
034	Fish, fresh, (live or dead) chilled or frozen	147,577	930	-
035	Fish, fresh, salted or in brine, smoked fish (whether or not cooked before or during the smoking process	1,327,940	675	2,715
036	Crustaceans and molluscs, whether in shell or not, fresh (live or not) chilled, frozen, salted, in brine or dried, crustaceans, in shell, simply boiled in water	135,645	322,892	-
037	Fish, crustaceans and molluscs, prepared or preserved n.e.s.	698,563	-	150
041	Durum wheat, unmilled	727	-	-
042	Rice	1,615,167	-	0
043	Barley, unmilled	4,180	-	-

TABLE E-3 (continued)
VALUE OF IMPORTS BY GROUPS, 1989

(Value C.I.F. in E.C. Dollars)

S.I.T.C GROUP	COMMODITY	IMPORTS	DOMESTIC EXPORTS	RE - EXPORTS
044	Maize (corn), unmilled	42,352	-	-
045	Cereals, unmilled (other than wheat, rice barley and maize)	-	-	-
046	Meal and flour of wheat and flour of meslin	3,295,956	-	0
047	Other cereals, meals and flours	273,982	-	-
048	Cereals preparations and preparations of flour or starch of fruits and vegetables	3,420,586	39,253	0
054	Vegetables, fresh, chilled, frozen or simply preserved (incl. dried leguminous vegetables), roots, tubers, and other edible vegetable products, n.e.s. fresh or dried	2,672,087	38,546	7,028
056	Vegetables, roots and tubers, prepared or preserved n.e.s.	687,575	320	72
057	Fruits and nuts (not incl. oil and nuts) fresh or dried	757,841	16,378	-
058	Fruit, preserved and fruit preparations	2,480,658	110	0
061	Sugar and honey	1,066,451	27,524,677	-
062	Sugar confectionary (except chocolate confectionary) and other sugar preparations	367,160	13	-
071	Coffee and coffee substitutes	214,568	30	-
072	Cocoa	24,335	-	-
073	Chocolate and other food preparations containing cocoa, n.e.s.	271,722	-	-
074	Tea and mate	112,808	-	-
075	Spices	106,656	0	30

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TABLE E-3 (continued)
VALUE OF IMPORTS BY GROUPS, 1989

(Value C.I.F. in U.S. Dollars)

S.I.T.C GROUP	COMMODITY	IMPORTS	DOMESTIC EXPORTS	RE - EXPORTS
081	Feeding stuff for animals (not incl. unmilled cereals)	1,843,236	0	397
091	Margarine and shortening	641,830	3,537,026	255
098	Edible products and preparations, n.e.s.	3,653,718	0	1,358
111	Non - alcoholic beverages	3,051,282	2,659,212	0
112	Alcoholic beverages	3,386,032	353,572	2,489
121	Tobacco, unmanufactured, tobacco refuse	2,543	-	-
122	Tobacco, manufactured	905,010	-	-
211	Hides and skins (except furskins), raw	250	690	-
212	Furskins, raw (including astrakhan, caracul, Persian lamb, broadtail and similar skins)	-	-	-
222	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of "soft" fixed vegetable oils (excluding flours and meals)	5,443	1,814	-
223	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of other fixed vegetable oils (incl. non-defatted flours and meals of oil seeds or oleaginous fruit)	126	44,218	-
232	Natural rubber latex; natural rubber and similar natural gums.	324	-	-
233	Synthetic rubber latex ; synthetic rubber and reclaimed rubber ; waste and scrap of unhardened rubber	305	-	-
244	Cork, natural, raw and waste (including natural cork in blocks or sheets)	3,680	-	-

TABLE E-3 (continued)
IMPORTS BY SECTIONS OF THE S.I.T.C. SHOWING PERCENTAGES IN
RELATION TO THE VALUE OF IMPORTS, 1985-1989

IMPORTS BY SECTIONS OF THE S.I.T.C. SHOWING PERCENTAGES IN RELATION
 TO THE VALUE OF IMPORTS 1985 - 1989

(100s) omitted

SECTION NOS	COMMODITY	1985		1986		1987		1988		1989	
		\$ E.C.	%								
	TOTAL IMPORTS	138,558	100.0	169,820	100.0	214,632	100.0	251,522	100.0	276,717	100.0
0	Food	29,578	21.3	30,456	17.9	33,234	15.5	39,185	15.6	40,491	14.6
1	Beverages and Tobacco	3,833	2.8	5,421	3.2	6,987	3.3	6,678	2.7	7,345	2.7
2	Crude Materials inedible except fuels	3,246	2.3	3,674	2.2	3,797	1.8	4,537	1.8	5,264	1.9
3	Mineral fuels, lubricants and related materials	11,328	8.2	9,956	5.9	13,573	6.3	13,551	5.4	16,898	6.1
4	Animal and Vegetable Oils and Fats	2,493	1.8	3,024	1.8	1,906	0.9	2,500	1.0	2,792	1.0
5	Chemicals	12,286	8.9	14,619	8.6	16,364	7.6	18,887	7.5	20,816	7.5
6	Manufactured goods classified chiefly by material	26,930	19.4	35,855	21.1	41,870	19.5	51,121	20.3	55,139	19.9
7	Machinery and transport equipment	27,846	20.1	40,167	23.7	63,528	29.6	80,670	32.1	90,979	32.9
8	Miscellaneous and manufactured articles	20,992	15.2	25,819	15.2	32,721	15.2	32,919	13.1	34,957	12.6
9	Miscellaneous, transactions and commodities, n.e.s.	26	0.0	829	0.5	652	0.3	1,474	0.6	2,036	0.7

TABLE E-3 (continued)
EXPORTS BY SECTION OF THE S.I.T.C. SHOWING PERCENTAGES
IN RELATION TO THE VALUE OF EXPORTS: 1985-1989

EXPORTS BY SECTION OF THE S.I.T.C. SHOWING PERCENTAGES
 IN RELATION TO THE VALUE OF EXPORTS: 1985 - 1989.

SECTION NOS.	COMMODITY	1985		1986		1987		1988		1989	
		\$ B.C.	%								
	TOTAL EXPORTS	48,896	100.0	63,568	100.0	71,636	100.0	69,618	100.0	68,316	100.0
0	Food	24,549	50.2	31,147	49.0	27,352	38.2	27,568	39.6	31,571	46.2
1	Beverages and Tobacco	3,192	6.5	2,297	3.6	2,723	3.8	3,051	4.4	3,013	4.4
2	Crude Materials inedible except fuels	499	1.0	1,121	1.8	430	0.6	400	0.6	186	0.3
3	Mineral fuels, lubricants and related materials	0	0.0	0	0.0	0	0.0	0	0.0	2	0.0
4	Animal and Vegetable Oils and Fats	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
5	Chemicals	126	0.3	124	0.2	37	0.1	28	0.0	51	0.1
6	Manufactured goods classified chiefly by material	333	0.7	615	1.0	2,045	2.9	736	1.1	912	1.3
7	Machinery and transport equipment	12,953	26.5	15,815	24.9	21,066	29.4	23,046	33.1	21,937	32.1
8	Miscellaneous and manufactured articles	7,012	14.3	12,356	19.4	17,523	24.5	14,585	21.0	10,401	15.2
9	Miscellaneous, transactions and commodities, n.e.s.	232	0.5	93	0.1	460	0.6	204	0.3	243	0.4

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TABLE E-3 (continued)
RE-EXPORTS BY SECTION OF THE S.I.T.C. SHOWING PERCENTAGES
RELATION TO THE VALUE OF RE-EXPORTS: 1985-1989

RE-EXPORTS BY SECTION OF THE S.I.T.C. SHOWING PERCENTAGES

 RELATION TO THE VALUE OF RE-EXPORTS: 1985 - 1989.

(000s) omitted

SECTION NOS.	COMMODITY	1985		1986		1987		1988		1989	
		\$ E.C.	%								
	TOTAL RE-EXPORTS	6,114	100.0	43,335	100.0	3,940	100.0	4,481	100.0	8,931	100.0
0	Food	102	1.7	48	0.1	70	1.8	45	1.0	19	0.2
1	Beverages and Tobacco	2	0.0	3	0.0	17	0.4	7	0.2	2	0.0
2	Crude Materials inedible except fuels	20	0.3	6	0.0	2	0.1	48	1.1	4	0.0
3	Mineral fuels, lubricants and related materials	10	0.2	13	0.0	548	13.9	695	15.5	14	0.2
4	Animal and Vegetable Oils and Fats	-	-	0	0.0	1	0.0	...	0.0	0	0.0
5	Chemicals	21	0.3	38	0.1	43	1.1	50	1.1	61	0.7
6	Manufactured goods classified chiefly by material	338	5.5	222	0.5	492	12.5	571	12.7	701	7.8
7	Machinery and transport equipment	4,833	79.0	3,488	8.0	2,423	61.5	2,282	50.9	7,390	82.7
8	Miscellaneous and manufactured articles	788	12.9	517	1.2	344	8.7	783	17.5	740	8.3
9	Miscellaneous, transactions and commodities, n.e.s.	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0

TECHNICAL ANNEX F

ST. VINCENT AND THE GRENADINES

CHEMONICS

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TECHNICAL ANNEX F
COUNTRY: ST. VINCENT AND THE GRENADINES

A. DESCRIPTION OF ISLAND'S AGRICULTURE

The island's agriculture is restricted by the difficulty of marketing its production. Farmers are in a continuous search for cash crops; their need of cash-flow has lead them to banana production. This need is exacerbated by the difficulty farmers encounter in obtaining credits. Roads and irrigation infrastructure also limit agriculture; its production depends entirely on rainfall. Approximately 90 percent of the farms are smaller than 5 (five) acres. High production costs preclude any efficiency in agriculture. These costs are dominated by high priced farmers' inputs and by expensive hand labor.

In spite of the above-mentioned constraints, for 1990 agriculture shows, the highest growth rate (in current prices) among the different activities of the GDP. The sector's rate of growth is 23.05 percent, and the crops sub-sector's 27.28 percent. The agricultural sector's contribution during 1990 to the GDP (at factor cost at current prices) was of 19.28 percent, of which 15.71 percent was the contribution of the crops' sub-sector. This contribution, in constant prices of 1977 is of 18.19 percent of which 14.98 percent was the crop subsectors (Table F-1).

1. Area

St. Vincent	345.4 sq.km.	85,350 acres
The Grenadines	42.6 sq.km.	10,450 acres
TOTAL	388.0 sq.km.	95,800 acres

2. Population and Percent in Agriculture

The population of St. Vincent and the Grenadines for 1989 was estimated at:

St. Vincent	105,485
The Grenadines	8,466
TOTAL	113,951

There is no official information on the percentage of the population involved in agricultural activities. Estimates from different sources indicate that at least 65 percent of the working force is informally involved in agriculture. A survey made at the end of the first quarter of 1989 shows the following distribution of persons employed in the formal economy: agriculture accounts for only 4.5 percent while construction 18.6 percent, manufacturing 12.2 percent, restaurants and hotels 21.4 percent, community, social and personal services 31.7 percent.

3. Main Agricultural Production and Exports

Banana production amply dominates agricultural production in St. Vincent, followed by root crops, spices, tree crops and vegetables (Table F-2).

St. Vincent's trade balance was negative by EC\$ 99.9 million for 1988 and by EC\$ 40 million for 1989, no data is available for 1990. Regional trade accounted for approximately 42 percent of total exports during 1988, of which 11 percent was to the OECS countries and the balance to the other CARICOM countries. Imports for the same year accounted for EC\$ 330 million, of which 40 percent were from the U.S.

Exports of bananas, mace and flour are the only commodities that show an increase from 1989 to 1990: bananas from EC\$ 89.9 million to EC\$ 120.3 million; mace from EC\$ 64,000 to EC\$ 84,669; wheat flour from EC\$ 18.8 million to EC\$ 19.5 million. All the other commodities show a certain decrease in exports (mainly regional trade), while there are no significant differences for imports from 1989 to 1990.

B. ORGANIZATION AND STRUCTURE OF MARKETING BOARD

The St. Vincent Marketing Corporation (SVMC) dedicates most of its efforts to its commercial operations, mainly the sugar imports, supermarket activity and produce department. The Corporation is the sole importer of sugar, the monopoly on rice was lifted in 1988 when a rice mill started its operations. No services, whatsoever, are provided by SVMC to producers nor to exporters of agricultural products. There are six different departments in SVMC:

- White Sugar Department, imports mainly from the U.K.;
- Brown Sugar Department, imports from Guatemala and Colombia;
- Rice Department, buys rice from ECGC, for further distribution;
- Supermarket Department, where retail and wholesale are done;
- Fish-market Department, a new venture since February 1990; and
- Produce Department, buys agricultural products for wholesale, retail and for exports. The latter activity has been almost completely dropped since 1989, when management changed.

1. Enabling Act

The number of the enabling act is **St. Vincent Act No. 2 of 1977**, and can be cited as the **St. Vincent Marketing Corporation (Amendment) Act, 1976**.

The Act establishes SVMC and tasks it with "improving the growing and marketing of produce; to undertake the importation of certain commodities and for matters incidental thereto or connected therewith."

2. Controlling Government Authority

SVMC is overseen by the Ministry of Agriculture.

3. Board

The Cabinet appoints all the nine members of the Board, for a period not to exceed 2 (two) years with the eligibility for reappointment. The Chairman and the Deputy Chairman are also appointed by the Cabinet among the Board's members. The Cabinet has the power to revoke the appointment of any member if "it thinks it expedient so to do."

The control of the Cabinet over the Board is indicated to divert in more "political" than technical appointments. By doing this, the government establishes a Board that does not have the technical knowledge to give the correct directions to SVMC's functions and commercial operations.

4. Enacted Functions and Powers

The Act stipulates the following as "Function of the Corporation":

- "(a) to organize and effect imports of commodities particularly for the purpose of securing a sufficiency of those commodities essential to the well being of the community, their equitable distribution and their availability at fair prices.
- (b) to establish and administer in accordance with the directions of the Minister (of Agriculture) procedures and controls whereby the objectives of the Government relating to the effective control of the importation of commodities into the State and the exportation of produce out of the State can be achieved.
- (c) to act on behalf of the Government as importer of commodities or exporter of produce as the Minister may direct.
- (d) to stimulate, facilitate and improve the production, marketing and processing of produce in the State particularly for the benefit of the producer.
- (e) to secure the most favorable arrangements for the purchase, handling, transportation, marketing and sale of produce within the State.
- (f) to secure the most favorable arrangements for the purchase, handling, transportation, exportation and shipping marketing and sale of produce out of the State.
- (g) to assist agricultural and fishery co-operative societies to dispose of their produce to the best advantage.
- (h) to secure the most favorable arrangement whether within or without the State for the storage of produce and for the storage of such other matter or thing as the Corporation may think fit.

- (i) to make recommendations to Government on any matter directly or indirectly relating to the production and marketing of produce.
- (j) to recommend to Government measures whereby external trade can be promoted for the benefit of the community.
- (k) to engage in such trading activities as would be beneficial to the community.

The powers granted to the Marketing Corporation are:

- "(a) to buy and sell produce;
- (b) to fix and determine the grading of produce;
- (c) to export produce;
- (d) to establish and operate depots and agencies for the purchase, delivery, grading and sale of produce;
- (e) to establish and operate facilities for preparing and processing any produce;
- (f) to enter into contracts for the purchase and sale of produce upon such terms and conditions as the Corporation may think fit;
- (g) to enter into contracts for the transport of any produce as may facilitate the operations of producers;
- (h) to establish itinerant systems for the purchase of and sale of produce;
- (i) to establish and operate facilities for cold storage or any other form of storage for produce;
- (j) to act as commission agents for the disposal of the produce of any producer or co-operative society;
- (k) to purchase, transport, store, insure, handle and sell any packing material in such quantities and at such prices as the Corporation may from time to time determine;
- (l) to import commodities;
- (m) to enter into contracts for the shipping or transportation of commodities into the State;

The Corporation has the authority to appoint an agent or agents for the "purpose of exercising" any of the above mentioned powers.

The Cabinet can grant SVMC the monopoly of any product of the State by an order declaring it a "specified product", provided the marketing or control of this product is not vested in any other statutory authority. From the date stipulated in such order, the Corporation will be the sole purchaser, handler, processor, seller and exporter of such specified product.

A similar action has to be taken in order to grant SVMC the monopoly of "specified commodities": the Cabinet declares by order any commodity a "specified commodity", and from the date stipulated by the order, the Marketing Corporation is entitled to be the sole importer of such commodity.

The Marketing Corporation has the power to license any of the above mentioned export and import activities. Any activity of the sort without the corresponding license will be subject to legal actions.

The Corporation is also entitled to make regulations providing for:

- "(a) the procedure to be followed at meetings of the Corporation and in the transaction of its business;
- (b) the manner in which documents, cheques, and instruments of any description shall be signed or executed on behalf of the Corporation;
- (c) the inspection and grading according to its quality of produce intended for sale or for export, prohibiting the sale or export of such produce without inspection and grading and of any produce of inferior quality and the general control of the handling and export of any produce;
- (d) the granting, varying and amending of licenses under section twelve of this Act (on specified products), the forms of such licenses and the fees payable in respect thereof;
- (e) the cancellation or refusal of licenses in the case of persons contravening any regulations made under this Act and for disqualifying such persons from obtaining licenses;
- (f) the fees to be paid for any matter or thing done under regulations made under this Act and the disposition of fees;
- (g) the granting of travelling and subsistence allowance to members of the Corporation and the rates of such allowances;
- (h) the power and duties of inspectors and other officers appointed to carry out the provisions of this Act; and
- (i) areas where and places from which fresh meat and fish may be disposed of."

5. Infrastructure of the Board

The infrastructure owned and maintained by SVMC is principally related to its supermarket department and consists of:

- A building holding SVMC's offices and supermarket, warehouse for agricultural products;
- Three buying depots (Chateaubelair, Belmont-Windward and Belmont-Leeward):

- 3 trucks
- 2 forklifts
- 3 large cold rooms
- 3 small cold rooms
- 8 platform scales
- 8 trolleys
- 1 "hobast" slicer
- 3 bander machines
- 1 drink cooler
- 2 meat saws
- 2 pick ups
- 2 tractors
- 5 small chiu rooms
- 11 cash registers
- 1 bagsewing machine
- 1 food preparing machine
- 2 heat sealing equipment
- 2 staple machines
- 14 hand trolleys

6. Financial Situation

The general financial situation of SVMC is slightly profitable, but could be largely improved. The only economic viable activity among the commercial operations is the sugar department; the supermarket department has been losing money year after year. According to the last financial information for year-ended 1989, the net income of SVMC amounted to EC\$ 589,580. The different operations are summarized as follows:

Sugar Operation:

- Sales and transfers	EC\$	6,327,652
- Gross profit	"	1,574,877
- Trading profit	"	1,508,191

Rice Operations

- Sales and transfers	EC\$	1,120,995
- Gross profit	"	64,268
- Trading profit	"	46,588

Supermarket and Wholesale Operations

- Sales	EC\$	12,617,136
- Cost of sales		
Inventory-beg/yr	"	2,047,060

Purchases&transfers	"	10,908,331
Total	"	12,955,391
- Less inventory end/yr	"	1,712,012
Total	"	11,243,379
- Gross profit	"	1,373,757
- Less Direct Expenses	"	1,361,695
- Trading profit	"	12,062

Produce Operations

- Sales and transfers	EC\$	1,807,595
- Gross profit	"	534,577
- Trading profit	"	(70,046)

Cooking Oil Operations

- Sales and transfers	EC\$	2,143,167
- Gross profit	"	5,062
- Trading profit	"	(14,770)

The General and Administrative Expenses for 1989 totaled EC\$ 839,787, of which salaries and wages accounted for 57.2 percent or EC\$ 480,235 to cover its approximately 240 employees, including labor and administrative personnel. All employees are directly hired to be paid on a monthly or daily basis.

The following is a quick analysis of each department of SVMC for the first three quarters of 1990.

a. Sugar Department

The financial results for 1990's three first quarters are not favorable, this as a result of a decreasing trading profit of the sugar operation exacerbated by a constant selling price while costs have increased continuously.

b. Rice Department

Rice operations have been significantly reduced from the moment the Corporation loss its monopoly in 1988. SVMC is not the sole importer of rice since the advent of the local rice mill in 1988. This mill operates by importing paddy rice.

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c. Supermarket Department

The supermarket presents an inventory and costing inaccuracy which cause important fluctuations in the gross profit. This department's critical situation is exacerbated by the important direct costs, particularly with important salaries and wages and packing material costs.

The cooking oil operation has significantly been reduced since AVOIL is bottling oil in St. Vincent. This operation is actually under the Supermarket Department.

d. Produce Department

This department presents a consistent deficit. Management has not determined a profit level or break even for this operation. The definition of individual policies for each product could be the best approach to solve this situation.

e. Fish Market

This department presents poor gross profits and sustained net loss for the first three quarters of year 1990. The main cause for this is the lack of overall control, particularly in the accounting department. The lack of proper records for income collectables hinders the recovery of debts.

7. Prospects

There are no clear prospects for the future of SVMC. The lack of a clear policy from the Board is the main reason for this. Its weak management does not allow to foresee any important turn-around in the Corporation's activities.

The imminent need to re-organize the whole structure of SVMC is evident. A new legal framework should be established; specific priorities should be determined among the broad current responsibilities of the Board. These priorities should be clearly defined within a regulatory and market developer role, apart from current inefficient commercial activities, i.e., supermarket activities, produce department, exports, etc.

The operations that are not economically viable should be vested on another institution of the private sector where a profit result would be aimed, and overhead costs would permit to envision a profitable situation.

It is recommended that a feasibility study be done in order to restructure the entire legal framework affecting SVMC. In this study the "new" responsibilities of the Corporation have to be specifically defined. The study will have to determine the feasibility and recommend how to transfer to the private sector the Board's responsibilities on commercial operations.

The private sector's institution or organization to take over the commercial operations should be strengthened. It is also recommended that a private exporters' association be formed in order to channel to private exporters all efforts and support given from international institutions and/or the government. The Traffickers' Small Business

Association (TSBA) should be a member of the exporters association, this would complement the association's role in controlling all exports of agricultural products to the regional and extra-regional markets.

C. OTHER EXPORTERS AND IMPORTERS OF AGRICULTURAL PRODUCTS

1. Other Statutory Boards

The other statutory boards established to accomplish exports of agricultural products are: the St. Vincent Banana Growers Association, the TSBA and the Organization for Rural Development (ORD).

a. St. Vincent Banana Growers Association

The Banana Growers Association is granted the monopoly over exports of bananas from St. Vincent. In spite of this, there are some small (non authorized) exports to the regional market. The consultant was not able to meet with any representatives of the Banana Growers Association in St. Vincent.

According to the information released by the WINBAN, 1990 exports of banana from St. Vincent account for 52.6 percent of total domestic exports, and for 70.2 percent of total agricultural exports. Banana exports for the same year 1990 represented a 25.5 percent of St. Vincent's GDP.

b. Traffickers Small Business Association (Incorporated)

TSBA was set up in 1982 as a nonprofit, non-government association, and registered the 15th April, 1983, under the Business Names Ordinance No. 30 of 1950 of the Laws of St. Vincent and the Grenadines.

The main objective of the Association is "to organize the business of trafficking in St. Vincent and the Grenadines", and to work in benefit of its 55 registered members.

TSBA members buy from approximately 10,000 farmers

TSBA's export activities concentrate in the regional market, of which Trinidad is the most important. Mostly fruits are exported to Barbados, root crops (tannias, yams), sweet potatoes and pumpkins to Martinique.

- The volume of exports effected by TSBA using the locally based schooners, are estimated at:

• Trinidad	20-30	Tons/week
• Barbados	15	Tons/week
• Martinique	1	Tons/week

The infrastructure owned and operated by TSBA consists mainly of its warehouse, offices and 1 pickup truck (2-ton capacity). The building in the City of Kingstown, donated by USAID, holds the warehouse and the offices. This warehouse seems to be under-used and is mainly used as a packing and labeling area. The InterAmerican Foundation provided the Association with all the office equipment.

The main sources of TSBA's income are:

- 75 percent markup on the packing material sold to members
- membership fee of EC\$ 10/month
- 20 percent markup on all shipments made to Martinique (directly handled by the Association)

The Canadian High Commission based in Barbados granted EC\$ 17,700 to the Association.

TSBA policy is to continue to provide services to its members in order to facilitate their export operations, i.e.:

- TSBA will process documents at a lower cost than the private customs brokers, EC\$ 15/document against EC\$ 2025/document by brokers.
- The Association will continue to train its members in postharvesting and packaging.
- Exports to Martinique will continue to be entirely handled by the Association. To better accomplish this, the Association needs a better working capital to pay up-front the increasing purchases. The time required to collect the money from exports is approximately 2 weeks.
- The Association grants low-interest loans to its members, to be used as revolving funds to accomplish exports to Trinidad and Barbados.
- TSBA will continue to seek better packaging material and adequate box sizes, according to market needs, i.e., Martinique wants the products packed only in approximately 40 lb. boxes.

c. Organization for Rural Development (ORD)

The ORD is a nonprofit, nonpolitical, community based organization founded in St. Vincent in 1976, and incorporated in 1978 through the Act No. 14 of 1978, that can be cited as the Organization for Rural Development Incorporation Act, 1978.

ORD is governed by a General Assembly of Delegates and managed by a Central Committee of 11 (eleven) elected officers and 6 (six) farmer representatives

chosen from the 4 geographical areas of St. Vincent. There are 1,000 registered members in the Organization.

The main function of ORD is: "To promote high-quality rural development, and to foster co-operation among regional development organizations so as to improve the quality of life for all Eastern Caribbean people and Vicentians in particular."

ORD's objectives are:

- To increase the socioeconomic well-being of rural people;
- To carry out practical projects, using the country's natural resources, to stimulate the national and regional economy;
- To provide effective rural development services;
- To increase the entrepreneurial skills of small farmers and the viewing of farming as a business;
- To develop grassroots leadership potential at the community level;
- To generate adequate revenue for the self-sufficiency of ORD; and
- To promote a healthy and clean environment.

Actually ORD is working in the development of 5 crops for the export market. Its main concern is to get into the marketing of higher valued products for exports.

All the products exported to the U.K. are packed and shipped under ORD's responsibility and control.

ORD imports farmers' inputs without any special tariff treatment from the government, then resells them to its members with an approximate markup of 25 percent. The warehouse holding these inputs is located in the production area to provide a better service to farmers.

The infrastructure owned by ORD consists of:

- Pack house (200 x 60 feet), holding warehouse for inputs and products, washing, grading and packing area,
- 1 truck (3-ton capacity),
- 1 pickup used to collect products,
- drying equipment for turmeric (not being used),
- offices are located in a rented area in Kingstown.

The main financing sources for the previous two years have been grants from the Rockefeller and Kellog Foundations, USAID, CIDA and the Interamerican

Foundation. This situation is expected to continue to change, from relying on grants (2 years ago) for 95 percent of its income to contributing in 1991 with 50 percent from its own operations and the other 50 percent from grants. The failure to accomplish more exports through CATCO may preclude a participation at the indicated level.

ORD's main marketing constraints restraining its export operations are:

- Low quality of the products gathered at the farm level, mainly as a result of bad quality of post harvest handling;
- The varieties produced are not the ones that the market requires;
- Lack of working capital;
- Payment practices to farmers need to be improved, thus avoiding farmers' trips into town to collect small payments;
- Low buying capacity of ORD limited by low exported volumes; and
- Lack of standards for purchasing and for prices.

ORD's prospects are aimed at improving its export operations in order to continue to provide its members with market security for their products. The lack of working capital has to be solved in the near future. Help from international institutions is required to redress the quality of the products aimed for exports, especially to train farmers in postharvest handling.

2. Other Private Sector Exporters

There are three other main private exporters of agricultural fresh products whose operations are entirely supported by their own private efforts. These exporters are: Gunsam and Son, Eastern Caribbean Agencies and Square Deal Investments Ltd.

a. Gunsam and Son

Gunsam and Son is exporting mostly root crops, like tannia, dasheen, eddoes, etc., to the U.K. by sea and to Canada by air. Due to problems with the customer in Canada, shipments have been stopped for the last three months. Once again the lack of an agent to work in favor of the private sector's interest is present.

The volume of shipments varies according to the season and space availability. Current exports to the U.K. average approximately 5,000 lbs./week mainly of eddoes and pumpkins. These volumes rise in March to their highest peak, of 30,000 lbs/week, holding a record of 50,000 lbs./week.

Inquiries from Canada have been made to the company about supplying mangoes, avocados and breadfruit, but the lack of air transportation for shipping has forced them to leave that market unattended.

The transportation problem will have to be corrected in order to permit the establishment of markets, especially for new exporters. The role of CATCO is not well accepted in St. Vincent, particularly because it never approached the private exporters, who have the knowledge and capacity to prepare shipments, instead it has been working, with lots of troubles, with ORD, a newcomer in the export business.

Lobbying at the highest level is recommended to be carried out with Barbadian authorities in order to lift the ban on the landing of airplanes with flights originated in some OECS islands, particularly in St. Vincent. This would permit to use better the space available on the big air carriers to Europe and North America.

E. STATISTICAL APPENDICES

Table F-1

- Gross Domestic Product by Economic Activity at Factor Cost in Current Prices (EC\$ million) 1985-1990.

Source: Statistical Office, St. Vincent and the Grenadines

Table F-2

- Gross Domestic Product by Economic Activity at Factor Cost in Constant Prices (EC\$ million) 1985-1990.

Source: Statistical Office, St. Vincent and the Grenadines

Table F-3

- Percentage Contribution of GDP by Economic Activity, at Factor Cost at Current Prices (EC\$ million) 1985-1990

Source: Statistical Office, St. Vincent and the Grenadines

TABLE F-1
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY,
AT FACTOR COST IN CURRENT PRICES, 1985-1990

Sector	1985	1986	1987	1988	1989	1990
Agriculture	49.54	54.77	54.16	65.09	67.89	83.54
Crops	38.63	43.13	41.66	51.66	53.48	68.07
Livestock	3.27	3.37	3.54	3.72	3.89	4.07
Forestry	2.19	2.32	2.46	2.61	2.77	2.94
Fishing	5.45	5.95	6.50	7.10	7.75	8.36
Mining & Quarrying	0.52	0.76	0.94	0.96	1.04	1.11
Manufacturing	29.29	29.35	32.72	38.21	42.99	37.59
Electricity & Water	9.97	11.03	13.52	17.70	19.03	21.55
Construction	19.44	28.53	31.53	33.25	35.89	38.74
Wholesale & Retail Trade	28.70	31.61	35.50	38.85	43.63	51.70
Hotels & Restaurants	4.97	5.61	6.87	7.38	8.24	9.59
Transport	35.51	38.92	42.25	48.40	51.53	56.46
Road Transport	24.92	26.80	28.39	30.81	32.03	34.59
Sea Transport	6.62	8.41	9.74	12.10	13.59	15.31
Air Transport	3.97	3.71	5.12	5.49	5.91	6.56
Communications	10.94	14.49	17.93	22.47	27.92	33.73
Banks & Insurance	16.56	19.77	22.06	24.44	31.75	35.56
Real Estate & Housing	9.41	9.58	10.02	10.37	10.87	11.55
Government Services	42.93	46.51	55.55	59.67	67.53	70.52
Other Services	6.53	6.65	6.97	7.21	7.46	8.25
Less Imputed Service Charge	12.04	13.01	13.01	15.53	25.39	27.42
TOTAL	257.27	284.57	318.02	358.47	390.38	433.24
PERCENTAGE CHANGE	8.48	12.80	11.75	12.72	8.90	10.55

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TABLE F-2
GROSS DOMESTIC PRODUCT BY ECONOMIC ACTIVITY,
AT FACTOR COST IN CONSTANT PRICES, 1985-1990
(EC\$ MILLION)

Sector	1985	1986	1987	1988	1989	1990
Agriculture	23.32	24.18	23.07	28.85	29.22	33.76
Crops	18.38	19.02	17.87	23.41	23.53	27.81
Livestock	2.30	2.37	2.25	2.32	2.39	2.46
Forestry	0.37	0.38	0.39	0.40	0.41	0.42
Fishing	2.27	2.41	2.56	2.72	2.89	3.07
Mining & Quarrying	0.35	0.39	0.43	0.45	0.48	0.50
Manufacturing	13.78	14.62	15.96	16.76	18.86	16.53
Electricity & Water	4.34	4.68	5.28	5.88	6.02	6.82
Construction	12.43	14.29	16.12	16.69	17.92	18.82
Wholesale & Retail Trade	14.74	16.23	17.63	18.90	20.51	22.27
Hotels & Restaurants	3.78	4.03	4.77	5.02	5.42	5.95
Transport	22.83	24.55	25.87	26.80	29.66	31.83
Road Transport	16.41	17.40	18.47	18.91	20.83	21.87
Sea Transport	5.18	5.65	6.32	6.71	7.50	8.56
Air Transport	1.24	1.50	1.08	1.18	1.33	1.40
Communications	6.51	7.32	9.06	11.35	14.10	17.06
Banks & Insurance	5.21	5.70	5.52	5.16	6.50	7.05
Real Estate & Housing	4.84	4.90	4.96	5.03	5.10	5.17
Government Services	18.91	19.48	20.06	20.62	21.24	21.69
Other Services	3.50	3.55	3.60	3.65	3.70	3.75
Less Imputed Service Charge	3.79	3.75	3.26	3.28	5.20	5.58
TOTAL	130.75	140.17	149.07	161.88	173.53	185.62
GROWTH RATE	4.50	7.20	6.35	8.59	7.20	6.97

SOURCE: Statistical Office, St. Vincent and the Grenadines

TABLE F-3
PERCENTAGE CONTRIBUTION OF GROSS DOMESTIC PRODUCT
BY ECONOMIC ACTIVITY, AT FACTOR COST
AT CURRENT PRICES, 1985-1990

Sector	1985	1986	1987	1988	1989	1990
Agriculture	19.64	19.25	17.03	18.16	17.39	19.28
Crops	15.31	15.16	13.10	14.41	13.70	15.71
Livestock	1.30	1.18	1.11	1.04	1.00	0.94
Forestry	0.87	0.82	0.77	0.73	0.71	0.68
Fishing	2.16	2.09	2.04	1.98	1.99	1.95
Mining & Quarrying	0.21	0.27	0.30	0.27	0.27	0.26
Manufacturing	11.61	10.31	10.29	10.66	11.01	8.70
Electricity & Water	3.95	3.88	4.25	4.94	4.87	4.98
Construction	7.71	10.03	9.91	9.28	9.19	8.94
Wholesale & Retail Trade	11.38	11.11	11.16	10.84	11.18	11.93
Hotels & Restaurants	1.97	1.97	2.16	2.06	2.11	2.21
Transport	14.08	13.68	13.60	13.50	13.20	13.03
Road transport	9.88	9.47	8.93	8.59	8.20	7.98
Sea transport	2.62	2.96	3.06	3.38	3.48	3.58
Air transport	1.57	1.30	1.61	1.53	1.51	1.47
Communications	4.34	5.09	5.64	6.27	7.15	7.80
Banks & Insurance	6.56	6.95	6.94	6.82	8.13	8.21
Real Estate & Housing	3.73	3.37	3.18	2.89	2.78	2.74
Government Services	17.02	16.34	17.47	16.65	17.30	16.35
Other Services	2.59	2.34	2.19	2.01	1.91	1.90
Less Imputed Service Charge	4.77	4.57	4.00	4.33	6.50	6.33
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00

SOURCE: Statistical Office, St. Vincent and the Grenadines

TECHNICAL ANNEX G

LIST OF CONTACTS

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ANNEX G
LIST OF CONTACTS

INSTITUTION	POSITION	NAME OF PERSON
ANTIGUA AND BARBUDA		
Ministry of Agriculture, Lands, Fisheries and Housing	Permanent Secretary	Mr. Ernest Benjamin
	Director of Agriculture	Mr. Francis Henry
Ministry of Trade Industry & Commerce	Permanent Secretary	Mrs. Idabelle Matthias
	Snr. Research & Industry Officer	Mr. Dunstan Sorhaindo
Central Marketing Corporation	General Manager	Mr. Dunstan Sorhaindo
PROMIS	Co-ordinator	Mr. Edwards
	Systems Responsible	Mrs. I. Ameen
Development Bank	Agriculture Loan Officer	Mr. Hilroy Willet
CATCO	Representative	Ms. Kathleen Forde
Small Farmers Association	Manager	Mr. Samuel Joseph
Statistical Department (M/Finance)	Director	Mr. Frank Jacobs
TROPRO	Transportation Advisor (Chemonics)	Mr. Sam Waithe
DOMINICA		
DEXIA	General Manager	Ms. Hannah Clarendon
Hucksters Association	Executive Secretary	Mr. Cecil Joseph
DBMC	General Manager	Mr. Ambrose V. George
Ministry of Agriculture	Permanent Secretary	Mr. Eliud T. Williams

TROPRO	Marketing Advisor (Chemonics)	Mr. Walter Tindell
Ministry of Trade, Industry & Tourism	Chief Technical Officer	Mr. Irwin Larocque
AID Bank	Farm Improvement Officer	Mr. Patrick Delauney
R & R	General Manager	Mr. Renaud Blaize
Citrus Growers Aso.	Secretary	Mr. Samuel J. Anselm
Dominica Floral Exports	(Owners)	Ms. Sheila Hernon & Mr. Bruce Martins
ADCU	Co-ordinator	Mr. Charlesworth Tabor
	Marketing & Intelligence Officer	Mr. Andrew Satney
Statistical Department	Agriculture Planning & Statistics Officer	

GRENADA

Ministry of Agriculture	Permanent Secretary	Mr. Basil Harford
	Principal Assistant Secretary	Mr. Raymond Edwards
ARCDP	Project Manager	Dr. Winston J. Phillips
GMNIB	General Manager	Mr. Stephen N. John
	Sales Manager	Mr. William Noel
GDB	Farm Improvement Officer	Mr. Winston Bain
	Snr. Agricultural Credit Officer	Mr. Francis A. Robertson
Banana Society	General Manager	Mr. Isaac
Central Statistical Office	Officer	Mr. Boney
M/Finances & Trade	Trade Co-ordinator	Ms. Lucia Andell
GCA	General Manager	Mr. Leon Charles
	Chairman/Board	Mr. Raymond Rush

GCNA	General Manager	Mr. Edward Lord
Westerhall Estate Ltd.	General Manager	Mr. Graham Williams
Grenada Home Industries	(Owner)	Ms. Mary Regis
Caribbean Agro Industries Ltd.	General Manager	Mr. Jonathan Bradshaw
ST. LUCIA		
M/Agriculture, Lands, Fisheries, Forestry and Cooperatives	Principal Assistant Secretary	Mr. Stephen Fontinelle
	Director of Agricultural Services	David Demagne
	Marketing Coordinator	Mr. George Alcee
	Statistical Director	Ms. Therese Alexander-Louis
M/Trade, Industry & Tourism	Assistant Secretary	Mr. Darrell Theobalds
	Trade Officer	Mr. David Jordan
SLMB	General Manager	Mr. Michael Willius
FPEA	President	Mr. Milton Jn. Baptiste
Evans Int.	General Manager	Mr. Ernest Evans
Private Exporters of Fresh Products	(Owners)	Mr. Kennedy D'Auvergne & Mr. Reo Dayes
SLBGA	General Manager	Mr. Michael Lansiquote
SL Agriculturalist Aso. Ltd.	General Manager	Mr. R.R. Raveneau
CML	Managing Director	Mr. Tjibbe Schepper
Private Exporter	(Owner)	Mr. James Valton
Valton Enterprises Ltd.	Manager	Mr. Peter Serieux
Development Bank	Credit Officer	Mr. H. LaForce
SFAD	Agricultural Development Project Manager	Mr. Stephen Best

WINBAN	Manager	Mr. Cyril Mathews
ST. KITTS		
M/Trade and Industry	Assistant Secretary	Mr. Harry Greene
	Supply Unit	Mr. Joseph Merchant
Development Bank	General Manager	Mr. Auckland O. Hector
CEMACO	General Manger	Mr. Maxwell Griffin
	Farm Coordinator	Mr. Kenrick Isaac
Chamber of Industry & Commerce	Executive Director	Mr. Alexis Knight
SSMC	Financial Controller	Mr. Samuel Nathaniel
M/Agriculture, Lands & Housing	Permanent Secretary	Mr. Valdemar Warner
	Chief Extension Officer (Ag. Depart.)	Mr. Stephen Duggings
IPA	Assistant Manager	Mr. Harry Green
ST. VINCENT		
Gunsam & Son	(Owner)	Mr. Lloyd Gunsam
ORD	Managing Director	Mr. Jethro Greene
	Agricultural Co-ordinator	Mr. Kenneth Bonadie
TSBA	President	Mr. Norman Pemberton
M/Agriculture, Lands & Housing	Permanent Secretary	Mr. Geoffrey Venner
	Agricultural Planning Officer	Mr. Reuben Robertson
	Planning Unit Officer	Mr. Hugh Johnson
Marketing Corporation	General Manager (acting)	Ms. Mourine DeFreitas
	Financial Controller	Ms. Ivette Wickham
	Personnel Manager	Mr. Bacchus

The Development Corporation

Executive Director

Mr. Ron Phillips

Farm Improvement Officer

Mr. Morrison Baisden

Square Deal Invest. Ltd.

Manager

Mr. Samuel Barnwell

Eastern Agencies

Caribbean

Managing Director

Mr. Douglas DeFreitas

MR. DUNSTAN SORHAINDO

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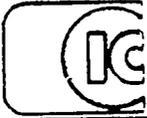
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