

# **GEO**

## **Guyana Economic Opportunities**

### **Rapid Reconnaissance Survey of the London Market for Guyanese Products**

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## **Abbreviations**

African, Caribbean and Pacific countries (ACP)  
Common Agricultural Policy (CAP)  
Department of Environment, Food and Rural Affairs (DEFRA).  
Department of Trade and Industry (DTI)  
European Union (EU)  
Guyana Economic Opportunities (GEO)  
Generalised System of Preferences (GSP)  
Her Majesty's Customs and Excise (HM CE)  
the Intervention Board Executive Agency (IBEA)  
Inward Processing Relief (IPR)  
Least Developed Countries (LDCs)  
Local Authorities Coordinating Body on Food and Trading Standards (LACOTS)  
maximum residue levels (MRLs)

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## **Executive Summary**

An important component of the Guyana Economic Opportunities (GEO) Project is to support the development of small and micro-enterprises (SMEs). A major constraint identified by SME businesses is their inability (at present) to access markets and to establish sustainable market linkages. Guyana's population is small, offering a limited potential for SMEs to increase sales domestically and a high level of competition. For the sector to grow, it must find new markets.

One focus area of the GEO SME program is to help the sector identify new markets and facilitate access to those markets. It is well known that there are large Guyanese expatriate communities in and around Toronto, New York City, and London. These cities offer a significant niche market potential for traditional Guyanese products.

This report contains the results of GEO's initial efforts to define the characteristics and to identify the opportunities and constraints of the Guyanese and West Indian markets in the Greater London Area specifically and the United Kingdom's (UK) market generally. It represents a first step towards equipping the SME sector with the necessary information and tools required to penetrate new markets.

The consultant became familiar with the SME sector and its products before carrying out the market survey in London while developing the SME Export Action Plan in April of 2002.

## **General Summary of Assignment and Results**

The overall conclusion of this assignment is that potential exists to increase exports from small and micro-enterprises in Guyana to the ethnic communities in London but not to the extent reported in the study of the New York and Toronto markets. There are some major constraints and drawbacks that must be addressed to increase exports to the UK from Guyanese firms. Addressing these issues will require a planned and coordinated effort with specifically chosen products to target this market.

The following product categories were examined during the market study:

- Fresh produce
- Processed foods
- Seafood
- Food supplements
- Kitchen implements
- Gold jewelry
- Furniture
- Handicrafts
- Organic produce, fish, and processed foods

- Tea<sup>1</sup>
- Herbs and Spices

The interviews conducted in both markets did not reveal a significant interest in the handicraft market, or gold jewelry market (although raw gold continues to remain a UK import from Guyana).

The scope of work for this activity called for the identification of the following information:

- Size of the markets
- Penetration of products from Guyana
- Competition
- Opportunities to increasing exports
- Obstacles to increasing exports
- Ways of overcoming the obstacles

**Market size:** While specific data were not available, it is estimated that there are approximately 85,000 to 120,000 Guyanese living in the United Kingdom. Their per capita income is said to be about average, relative to that of other ethnic groups.

In terms of export volume, the UK market ranks third behind Canada and the US as illustrated by the Exhibit 1.

**Exhibit 1. Guyanese Import and Export Volume by Market<sup>2</sup>**

Guyana's Leading Markets 1998	% of total	Leading Import Suppliers to Guyana 1998	% of total
<b>US</b>	25%	<b>US</b>	28%
<b>Canada</b>	24%	<b>Trinidad and Tobago</b>	21%
<b>UK</b>	19%	<b>Greater Antilles</b>	14%
<b>Greater Antilles</b>	11%	<b>UK</b>	7%
<b>Jamaica</b>	5%	<b>Japan</b>	5%

**Penetration, Competition, Opportunity:** The following exhibit summarizes in general terms the degree of penetration, level of competition and opportunity for Guyanese products in the London market:

<sup>1</sup> The market for tea became apparent as the survey evolved

<sup>2</sup> Data from the IMF supports that of Table I. The IMF's figures show that Guyana's of major exports of commodities (sugar, gold, bauxite/alumina, rice, shrimp, molasses), 22% went to the UK market. The total value of these commodities was \$565 million (1996 est.) and the other major trading partners were: Canada 33%, US 24%, (1994 est.).

### Exhibit 2. Penetration, Competition, Opportunity

Product	Penetration	Competition	Opportunity
Fresh produce	Little	Substantial	Some
Processed foods	Little	Substantial	Some
Seafood	Negligible	Substantial	Little
Food supplements	Little	Some	Little
Kitchen implements	Negligible	Some	Some
Gold jewelry	Negligible	High	Little
Furniture	Some	High	Some
Handicrafts	None	Little	Little
Tea	High	Some	High (especially Cerassie)
Herbs and Spices	Little	High	Some
Organic Produce	Little	High	Little (due to regulatory barriers)

**Obstacles and Overcoming Them:** The following exhibit includes some of the major obstacles and solutions that must be addressed to increase exports to the Caribbean community in London.

### Exhibit 3. Obstacles and Solutions

Obstacle	Solution
Expensive transportation and shortage of air cargo space	<ol style="list-style-type: none"> <li>1. Form a freight users group to work for improvements.</li> <li>2. Identify specific transportation constraints and recommend/implement improvements.</li> </ol>
Poor product quality	<ol style="list-style-type: none"> <li>1. Hold workshops in which importers from London will be among the presenters.</li> <li>2. Provide training/workshops on proper packaging/labeling.</li> <li>3. Install cool and cold storage and fumigation chambers at the airport in Georgetown.</li> </ol>
Poor packaging and labeling	<ol style="list-style-type: none"> <li>1. Hold workshops in which importers from London will be among the presenters.</li> <li>2. Establish a package design center in an existing Guyanese</li> </ol>

	<p>organization.</p> <p>3. <b>Facilitate importation of materials for packaging and labeling.</b></p>
Export “red tape” in Guyana	<p>1. <b>Establish a “one window” export documentation system.</b></p> <p>2. <b>Assure that the system is clean and transparent.</b></p>
Lack of an export mentality	<p>1. <b>Hold workshops in which importers from London will be among the presenters.</b></p> <p>2. <b>Develop a system of recognition and awards for successful exporters.</b></p>
Poor perception of Guyanese goods by London importers	<p>1. <b>Involve key importers in the process of quality and consistency improvements.</b></p> <p>2. <b>Work with Guyanese trade associations to increase quality assurance.</b></p>

## Greater London Market Survey

As expected, there are considerable differences between the target market for Guyanese products in London as compared to the markets of the New York City area and Toronto. First, the Guyanese population in the United Kingdom is spread out throughout the Greater London area and other secondary cities in the UK. As a result no “little Guyana” exists in London as it does in New York City. Also, the importers in the United Kingdom are located in specific wholesale markets according to product. Similarly, retail stores are typically located in specific neighborhoods according to the type of product sold. This segregation of goods is largely a carry-over of the historic crafts and trade districts in the UK. Having said this, there are two markets, Shepard’s Bush and Brixton, which are known for their Caribbean products. Also, the Berwick, Billingsgate, Brick Lane, East Street, and Roman Road Markets are large produce and fish outlets. [Annex A](#) provides a list of London markets which offer products relevant to this study.

The transportation options from Guyana to London are similar to those available to New York or Toronto. However, the UK customs process can be more complex than that of New York due to the sometimes overlapping European Union (EU) and UK requirements.

### A. Snapshot of the Greater London Target Market

*What is the target market?*

Products in the New York and Toronto markets were generally labeled as Guyanese in an attempt to directly market to the Guyanese immigrant community. This country-specific labeling is not as apparent in London where the word “Caribbean” is generally found on the logos and slogans of the products in ethnic stores.<sup>3</sup> Several reasons play into this distinction in the London market. First, the Guyanese population is smaller than that of New York, it is also an older market with several second and third generation Guyanese who, it is presumed, seek out Guyanese specific products to a lesser extent than recently arrived immigrants. Furthermore, the population is more dispersed than that of the New York and Toronto markets. As a result, many labels promote their products as “Caribbean”. Although most products do list their country of origin, more general Caribbean logos are used in the UK markets. For example:

- In the case of the Dalgety brand tea a simple “Caribbean” logo precedes the product description (see Exhibit 4);
- the Dalgety brand plantain crisps carry the slogan “Caribbean Choice”;
- “Caribbean Kuchela” is the name of a product from Trinidad;

**Exhibit 4: Dalgety Products**



<sup>3</sup> The major exception to this product marketing is with Jamaica products which often include the word Jamaica(n) in their labels. Examples of these products include Jamaican Sun products and Dunn River products such as “Jamaican Jerk Seasoning.”

- and the Chief brand green seasoning (also from Trinidad) states that it is a “Conimentos Verdes Carbenos”.

The owner of Dalgety, owner of perhaps the most successfully Guyanese product line in the UK, stated that he considers his market as the larger Caribbean community and thus labels his products accordingly. He feels that labeling a product as Guyanese in origin might actually narrow his outreach rather than enhance it.

*How large is the market?*

Historically speaking, census records show that there were only 27,218 people of Caribbean birth, or born of West Indian parents, in the UK as reported in 1951. This figure had boomed to 548,070 by 1971. It is estimated that in the 1950s and 1960s thousands of Guyanese immigrated to London. In fact, statistics indicate that an average of 6,080 declared emigrants left Guyana each year between 1969 and 1976, increasing to an average of 14,400 between 1976 and 1981. Figures for 1976 showed 43 percent of the emigrants going to the United States, 31 percent to Canada, 10 percent to Britain, and 9 percent to the Caribbean. As these statistics show, in the 1970s New York and Canada supplanted London as the destination of choice. Guyanese immigration to the UK slowed during the 1980s and 1990s and as a result the population in London is largely second (and sometimes third) generation Guyanese as well as students who may not desire (or be allowed) to establish roots in the United Kingdom.<sup>4</sup>

The last official UK census numbers available are from the year 1991. For the first time in UK census history, the 1991 survey asked about specific ethnicity. Of the categories provided the ethnic group “Black Caribbean” is the only one which might apply to Guyanese living in the London. According to this census, there are 6.7 million persons living in London and approximately 4.4% of the population is of “Black Caribbean” descent for a population of 295,000 (see [Annex B](#)). However, the number of Caribbean’s from other ethnic groups, such as Asia, is not determined by this census. The census is further limited by its failure to distinguish between countries in the Caribbean. Nevertheless, 295,000 will be used as a starting point for purposes of this estimate.

The 1991 census does provide one further insight into the size of the Guyanese population in the UK It asks the household submitting to provide the country of birth for each family member. Of those submitting from London, 14,662 listed Guyana as their country of birth.<sup>5</sup> Academic research suggest that this number is an artificially low determinate of the true population of immigrants in London and the UK as a whole. Some studies suggest that as many as 60% of non-white citizens failed to fill out the newly introduced ethnic origin questions. Using this research as a basis we can surmise that the number of Guyanese living in London could be more than twice the size of the census report or as large as 40,000. Furthermore, the census does not account for Guyanese

<sup>4</sup> Guyana, a country study. Federal Research Division, Library of Congress. Edited by Tim Merrill Research Completed January 1992

<sup>5</sup> *Communities of over 10,000 people who were born outside England and who now live in London. 1991 Census, LBS Table 7*

living in London on a work or student visa or in a nonformal status, nor does it count a large number of second and third generation Guyanese who would count the UK as their place of birth. An estimate based on these factors would be crude; however, based on interviews with the UK's Ministry of Home Affairs and the Guyana Commission, doubling or even tripling this number based on these remaining factors may leave a more realistic estimate of between 80,000 to 120,000 Guyanese living in London.

The previous population estimate of 80 to 120 thousand is further justified when returning to the 1991 census. As stated the census showed that 295,000 "Black Caribbeans" reported living in London. Estimates suggest that around 9-10 percent of this population is from Guyana (with the remaining population largely coming from Jamaica, Trinidad and Tobago, and Barbados in that order). This estimate suggests a starting figure of 26,550 of the "Black Caribbean" population from Guyana. Once again by assuming that only 40% of the respondents provided this data we can assume another 60% of the population is "Black Caribbean" for a total of 42,480. If the current demographics in Guyana are applied to the population of London<sup>6</sup> then one can conclude that between 43,329 can be estimated to live in London from Guyana's Indian and European populations.<sup>7</sup> As a result a conservative population of around 85,000 is determined.

Of these various sources and census data available we can assume that the number of people living in the UK of Guyanese decent is between 85,000 and 120,000.

#### *Where do they live?*

The Greater London area continues to act as a settling place for migrants, as well as British-born ethnic minorities, and the Guyanese community is no exception. The 1991 census question on "Country of birth" allows us to identify numerous large groups of overseas-born communities living in the UK, and these show a universal tendency towards concentration in London. The Guyanese respondents showed that 72 percent were living in Greater London. Responses to the 1991 census's ethnic grouping question shows that the Black-Caribbean ethnic group is London's second largest, at 295,000 people. Furthermore, this group is relatively homogeneous, with 98 per cent born in the UK or the Caribbean..

Traditionally, those Jamaicans who settled in London tended to locate in Clapham and Brixton. The Bajan community settled in Notting Hill and the Guyanese, traditionally settled in Tottenham and Wood Green.<sup>8</sup> However, an informal survey of Guyanese living in the UK showed that these population centers have since dispersed throughout greater

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<sup>6</sup> Admittedly, applying the current Guyana demographics to determine the London population's demographics is a loose approach; however, nothing read and no interviews conducted by this researcher would suggest that one ethnic group immigrated to the UK any more than another.

<sup>7</sup> Based on current World Fact book statistics, the Guyanese demographics are: East Indian 51%, black 30%, mixed 14%, Amerindian 4%, white and Chinese 1%. These demographics show 52% of Asian and European decent.

<sup>8</sup> Source: Menu magazine - <http://www.menumagazine.co.uk/book/restauranthistorymore.html> Published on behalf of Grove Publications P.O.Box 416 Surbiton, Surrey, KT5 8ZF, United Kingdom Copyright 2000 Peter & Colleen Grove

London and into other communities such as Birmingham and Manchester.<sup>9</sup> Interviews with Guyanese living in the UK support this survey result and reveal that the population may be more difficult to capture as a result. Mitigating this factor is that Caribbean products are generally known to be found at two markets, Shepherd's Bush and Brixton. During market surveys in these markets several Caribbean customers were interviewed and rarely did these persons come from the immediate vicinity of the markets. Instead, the markets were used, especially on weekends, as a central area known for their wide range of Caribbean products.

*What is their estimated purchasing power?*

A recent study of UK immigrant economics showed that The Black-Caribbean group (as defined by the 1991 census) has the highest economic activity rates both amongst men (81 per cent) and women (67 per cent) as compared with other immigrant communities.<sup>10</sup> According to a 2001 census the average household income in the UK is £23,200.<sup>11</sup> Assuming that the average Guyanese household has 3 persons (just above the UK average), between 28,300 and 40,000 households exist for a total income of £685 million to £928 million per year. With a current exchange rate of about \$1.50 to the British Pound Sterling, this purchasing power can be estimated at \$1.027 to \$1.392 billion per year. This estimated purchasing power is smaller than the New York and slightly smaller than the Toronto estimates. However, the market can be considered substantial nonetheless.

[Annex C](#) includes information regarding the businesses serving the Guyanese and West Indian communities in the area.

## **B. Guyanese Products with Greatest Export Potential**

If marketed correctly, there is a potential to increase the sales of certain Guyanese products in the London market. For example, Ethnic foods are said to be currently "taking Europe by storm as healthy, fashionable eating options."<sup>12</sup> Examples of such foods include Thai, Japanese, Cuban, Lebanese and Caribbean. The UK has recently seen a rise in the number of ethnic restaurants and specialty stores signifying a growth of British consumer interest in a broader range of produce, fish, and processed foods. "There is a move to authenticity," said Alison Cannon, director of sales and marketing at Indian food specialists, Pataks Foods. Specific ethnic foods with the greatest potential for export in the London market include:

- cerassie tea;

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<sup>9</sup> A questionnaire was sent to 92 Guyanese who are listed as living in the UK according to the [www.guyanaca.com](http://www.guyanaca.com) website.

<sup>10</sup> (Rob Lewis, Director of Demographic and Statistical Studies, London Research Centre, 81 Black Prince Road, London SE1 7SZ, United Kingdom Tel: +44 171 627 9652 Fax: +44 171 627 9606 )

<sup>11</sup> As reported in *Living it up?* [Electric Engineering Times](#) 29 October 2001 (9:57 a.m. GMT) By [Anthony Clark](#) based on market analysis by CACI

<sup>12</sup> *Meat Trades Journal*, November 2001

- packaged processed foods including plantain chips, cassareep, pepper sauce, essence oils;
- died spices;
- produce including cassava and other tubers, and scotch bonnet peppers;
- and processed wood for furniture, and finished furniture. has potential in the London market. [Annexes C&D](#) provides the contact details for the distributors and retailers involved with Guyanese products.

Promoting Guyanese foods in the London market requires considerable financial investment and research, according to Birgit Erath, owner of *The Spice Shop* and food marketing consultant. She states that although growing in popularity, the knowledge about ethnic foods in the UK is limited. As a result the manufacturer and retailer must strive to educate potential customers and avoid the now all-to-common inadequate labeling and packaging of consumer information which characterize some Guyanese products in the UK. She urges prospective manufacturers and retailers to exploit trade shows, cooking demonstrations, recipe leaflets, and enhance communications with people at every stage of the supply chain in their attempt to penetrate the London market.

**Exhibit 5: Dalgety Tea at a local ethnic store;**



**Cerassie Tea & Herbal Drinks.** Mark Dalgety, a Guyanese born UK citizen and the owner of Dalgety Caribbean Products, has followed this advice in obtaining a significant market for his tea during the past 7 years. Dalgety brand tea has recently found its way into the four major super market chains in the UK – Sainsbury, Tesco, Sainsbury, and Waitrose, and has recently signed contracts with distributors in the US and Ireland. He is currently researching introducing his product, much of which contains Guyanese grown Cerrassee tea leaves, into the continental European market and has begun to distribute a line of Plantain chips.

Dalgety’s outreach and production size might seem diminish its relevance to Guyanese SMEs trying to enter the UK market; however, Dalgety tea began its operations as an SME 7 years ago. The process of Dalgety’s growth should thus provide an excellent example for similar SMEs. Exhibit 5 below provides a snapshot of Dalgety’s products and history.

**Pepper Sauce.** The largest selling product at most Caribbean stores is a broad grouping of pepper sauces. These pepper sauces include green, hot, sauvory, marinade, and jerk seasonings. Most retailers felt that a good Caribbean brand pepper sauce would do well. Having said this, the store shelves are dominated by larger brand name products including Grace Kennedy, Windmill, and Chief among others.

### Essence oils and essences.

According to FD Copeland & Sons Limited<sup>13</sup> who import essential oils and essences, the market for Caribbean oils and essences is

growing. This is in part due to the increase in ethnic food sales in London but also, due to the shortage of essence and oils from Asia. This shortage was echoed by two other spice importers who said that the Caribbean (specifically Dominican

Republic, Jamaica, and Cuba) are benefiting from this shift in demand.

### Exhibit 6: A Snapshot of Dalgety Caribbean Products

Mark Dalgety began Dalgety Caribbean Products in 1995. This company achieved sales of 500,000 GBP last year and is growing rapidly. At this time sales are dominated by the Dalgety brand tea which includes Honey Ginger Tea, Lemon & Ginger, Ginger & Sorell, Lemon & Fevergrass, and Cerassie. At this point, Mr. Dalgety is only importing Cerassie from Guyana. His method of importing this key component to his tea is to dry the Cerassie in Guyana and bring it in on ships. Currently, his Guyanese counterpart (whom he is willing to provide the details for once the project is running) is attempting to train the Guyanese producers to dry the Cerassie at the point of production. Once this process has been accomplished, Mr. Dalgety would like to start working with producers to create a supply of Ginger and/or lemon grass. He feels that there is a larger market for these products beyond tea. This year Mr. Dalgety has introduced a line of Plantain Crisps using plantains from Surinam and will be introducing a pepper sauce made from a Guyanese recipe but not Guyanese products at this time.

**Cassava, Scotch Bonnets, Mangos.** In terms of produce, the produce importers at Hackney Downs Produce Consolidation Area in the Docklands felt that tubers (cassava and yams) and peppers were promising imports from the Caribbean. The London market is open to many of the same products from Africa, and Asia which are available in Guyana. The other product mentioned was Mangos. Surveying the Docklands center as well as the produce stands in Brixton and Shepherd's Bush revealed that the Mango quality in London is not as strict as described in the New York and Toronto markets. The importers stated that mangos from the Caribbean were not always ripe and often exhibited brown spots. Because of this the market for Mangos in London is limited but perhaps attainable given the fact that the mangos currently imported have some of the same brown spot issues which keep Guyanese mangos out of the Toronto market.

Exhibit 7: Produce stand, Brixton Market with Scotch Bonnet and Casava among other produce.



**Herbs and Spices.** A few importers of herbs and spices were interviewed for this study. In all cases the importers said that the demand for Caribbean herbs and spices is increasing due to the increase in spices and the decrease in Asian supply. However, the importers who had attempted to import herbs from Guyana were disappointed in their

<sup>13</sup> FD Copeland & Sons Limited, *Importers of essential oils*, Colanol House, 5 Westfield Street, London, SE18 5TL, United Kingdom, Tel: +44 (0)20 8854 8101, Fax: +44 (0)20 8854 1077, Email: [sales@fdcopeland.com](mailto:sales@fdcopeland.com), Web: [www.fdcopeland.com](http://www.fdcopeland.com), David Sergeant Director

quality and availability. Birgit Erath owner of The Spice Shop<sup>14</sup> said that she would be interested in buying single spices, which would be dried in Guyana and then ground and mixed in UK. She feels that Guyana producers should focus on medicinal herbs such as Cerrassie. She also said that she is available to discuss with Guyanese producers the herbs and spices market in the UK and the corresponding quality standards necessary to attain a share of it. Currently The Spice Shop offers 2500 different spices. In the case of imports from the Caribbean, Ms. Erath ships the herbs and spices in 25 kilo sacks. She works with contacts throughout the Caribbean who in turn consolidate product from the local producers. However, she is increasingly working directly with large Caribbean producers and eliminating the middle person. As for her experience with Guyanese spices she said that between, “inconsistent taxes, transport, corrupt practices, slow and inconsistent delivery” she was deterred from further dealings. The issue of quality is especially important in terms of spices where essential oil content of the spices are the most import aspect of her decision to buy. Packaging and labeling are not a major issue in this market as the importers will mix and repackage the herbs and spices which are imported.

**Wooden products and furniture.** The UK is a large importer of raw timber from Guyana and a limited amount of finished furniture. Precision Woodworking has established a growing market for its outdoor/lawn furniture in the U.K. and is probably the leading Guyanese furniture exporter. Another company which is beginning to sell finished furniture is Pinfold Timber Limited.<sup>15</sup> This furniture is made in Guyana by the Wood Associated Industries Company (WAICO) and sold by Pinfold through trade shows, fairs, and over the internet. Despite the fact that the company only began operations last year, they are enjoying a strong initial growth rate with 40,000 GBP in furniture sold last year and sales exceeding this amount already this year. At the Royal Ag show in Warwickshire Sandra Key, company secretary, said that she felt as if the company had a possibility of doubling sales each year over the next few years. This optimism, according to Ms. Key, is derived from the demand shown by the UK public for this unique lawn furniture. Ms. Key further feels that indoor furniture could do equally well in the UK market.

**Organic.** Although the market for organic products is growing as explained in section J, the regulations surrounding organic produce, fish, and processed foods is substantial. Having said this, Prince Charles recently began an organic cocoa production project in Guyana (see [Annex M](#) for a recent speech where he discusses this project and organic production in general). This project should be looked at as an opportunity for gaining a foothold in the London market for organic products. In order to attain a piece of this market the Guyanese producers will most likely require advisory services to further investigate and pursue regulatory

**Exhibit 8: Examples of Guyanese products on the market.**



<sup>14</sup> The Spice Shop, Dried spices, **Smoked Pimenton and other spices**, 1 Blenheim Crescent, London W11 2EE, Tel: 020 7221 4448, Fax: 020 7229 1591. [www.shop4spice.co.uk](http://www.shop4spice.co.uk)

<sup>15</sup> Pinfold Timber Limited, Pinfold House, Cliff Road, Snitterby, Lincolnshire, England. DN21 4UA 44(0) 1673 818231, fax: 44(0) 1673 818029, [sales@pinfoldtimber.com](mailto:sales@pinfoldtimber.com)

recognition of certain Guyanese organic production (that which can be considered organic based on current EU standards).

### C. Quantities, Prices, and Penetration of Guyanese Products

**Processed foods:** With the exception of Dalgety Tea (Exhibit 9) and Plantain Crisps, of the nearly 30 retail stores and stands visited ([see Annex C](#)) only 2 had Guyanese products available (see Exhibit 11 at the end of this Section). All of the stores visited did have a substantial amount of Caribbean products available from Jamaica, Barbados, Trinidad, and St. Lucia in order of predominance. Additionally, no “Guyanese style” products were available as they were in Toronto and New York.<sup>16</sup> Those few Guyanese products that are available are replenished on a one-to-one basis when the distributor has them available. The two stores which did sell Guyanese products said that there was a demand for these products but that they had a difficult time maintaining a consistent supply. Furthermore, most brands of Caribbean products list their UK distributor on their label, but other than Dalgety, no Guyanese product labels listed a contact or distribution company. Exhibit 6 lists the Guyanese products found and their corresponding retailer. If the consistency and standard of labels could be improved, a demand for Casareep is apparent in the London market according to retailers.

**Exhibit 9: Dalgety Tea at a local ethnic store;**



**Food Supplements:** Noni Juice, and herbal drinks made from Cerassie are both available in most ethnic stores. None identified are made in Guyana.

**Furniture and Handicrafts:** No handicrafts from Guyana were observed on the market. As stated previously two companies identified are selling furniture made in Guyana. No other retailers of Guyanese furniture were found; however, raw timber is imported into the UK and is reported to be used in UK furniture among other products.

**Fresh Produce:** There is little fresh produce from Guyana on the London market. A high level of competition exists from Trinidad and Jamaica and even more so from African countries such as Nigeria, and Ghana. Packaging is not seen as a problem with fresh produce as it is usually packaged by the distributing company within the UK or sold loose in fresh produce stalls in the market. The major issues cited which has limited the import of Guyanese produce has been the lack of consistency and quality of previous imports and the difficulty of importing certain produce. Having said this, there is a strong demand for cassava and other tubers as well as scotch bonnet peppers. According to those interviewed including produce importers and distributors listed in [Annex D](#) and UK civil servants, the produce imported from Guyana faces no across the board EU restrictions but may face individual restrictions based upon agriculture standards or EU import quotas.

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<sup>16</sup> Although “Jamaican style” was available illustrating the dominate position which Jamaican products hold in London.

Under the GATT agreement, selected fresh produce imported into the UK/EU is subject to the Entry Price System as detailed in Exhibit 10.

The Entry Price System works by setting a minimum import value, or entry price, for each product depending on the EU season. If the import value of any consignment falls below the entry price the importer will incur a new duty the "tariff equivalent" in addition to the normal customs duty. Further information on the Entry Price System can be obtained from the Fresh Produce Consortium whose details are located in [Annex F](#).

**Exhibit 10: Produce subject to the EU entry price system.**

Apples	Lemons
Apricots	Mandarins
Artichokes	Oranges
Cherries	Peach/Nectarines
Clementines	Pears
Courgettes(Zucchini)	Plums
Cucumbers	Tomatoes
Grapes	

Fruits and vegetables must conform to EU/UK Quality Standards -information on quality standards is available from the Ministry of Agriculture Fisheries and Food Horticultural Division.<sup>17</sup>

**Seafood:** Seafood from Guyana is said to be available at various times but is not listed as Guyanese in the fish markets surveyed. Furthermore, with the exception of salted cod and dried shrimp, no fish are sold at most Ethnic or Caribbean retailers. According to the distributors interviewed, fish sold on the UK market is rarely marketed as country specific. Furthermore, no one interviewed was aware of specific shipments or varieties of fish from Guyana which were consistently entering the UK market. The market for shellfish in the UK is growing rapidly and does potentially afford an opportunity for Guyanese products.

**Cookware:** Rolling pins, chopping blocks, and aluminum pots are all available in most ethnic stores. The aluminum pots are labeled as Jamaican Sun and the wooden kitchen wares have no brand name without exception. Inquiries about

**Exhibit 11: Guyanese Products Available**

**International Cash and Carry**, 160 Shepherd's Bush Market, London, 020 7432 313 has Guyanese products including:

- Guyanese MayoAchar from Rudolph Fredericks, 59 Robb St., Georgetown, Guyana – 2.78
- Continental Curry Powder – 3.99 for 908 grams
- Prestige Mixed Essence – 2.48 for 440 grams
- Major's Cassareep – 3.48 for 284 ml

**Afro-Caribbean Ethnic Food Store**, 41 Brixton Market, London has the following Guyanese products

- Bank's Beer – .80 for 1 or 2.49 for 6
- Prestige Mixed Essence – 2.10 for 440 grams
- Major's Cassareep – 2.99 for 284 ml

Available at most ethnic food stores:

- Dalgety Tea for between 1.19 to 1.78 for 24 bags;
- Dalgety Plantain Crisps - .69 for 50 grams
- Plantain Crisps, Fassy Foods Processing Co. – made with Caribbean plantains including some Guyanese imports - .69 for 60 grams

<sup>17</sup> Source: [www.defra.gov.uk](http://www.defra.gov.uk)

their origin reveal that some come from Jamaica and Africa (if the source was known at all). The aluminum pots are not top quality. Some have lids available but most are sold without lids. In all cases the aluminum pots had unrefined edges and marks from the molds. The rolling pins, and cutting boards were usually sold loose and seem to be mass produced.

**Gold:** Although UK imports statistics from Guyana include gold, no jewelry stores surveyed were selling Guyanese made jewelry.

#### **D. Major Competing Products**

**Fresh Produce:** The few fresh produce items which are imported from Guyana compete with similar items from Jamaica, Trinidad, Barbados, the Dominican Republic, Nigeria, Ghana, Kenya, and Cuba among others countries. For example, cassava and yams are imported daily from Nigeria. Dried herbs and spices are imported from all over the world; however, the conflict in the Asian subcontinent has led to an increase in imports from the Caribbean. Of these herbs and spices, the majority are imported from Jamaica, Barbados, Trinidad, Cuba, and the Dominican Republic.

**Processed Foods:** Jamaica has market supremacy in terms of imported Caribbean goods. In fact, a distributor of ENCO products said that some new entrants into the Caribbean market were (illegally) labeling their products “Jamaican” even though they were made in other counties – some of which were outside of the Caribbean. Other producers have labeled their goods as “Jamaican style”. Other than Jamaican products, the “Caribbean” or “West Indian” label is largely used (as opposed to country-specific product identification). Most ethnic food shelves are stocked predominately with the same brand names of pepper sauce, jerk seasoning, savoury sauce, green seasoning, etc.

[Annex D](#) provides a listing of brand names found on the shelves of ethnic/Caribbean retail shops.

**Cookware:** Nearly all of the aluminum pots (known by some as Dutch Pots) sold in the Ethnic stores are from the Jamaica Sun Company. The quality is marginal and they don't always come with lids (see Exhibit 12. Cutting boards, and other wooden cookware come from various countries, including those from Africa. Guyanese products could compete with these products based on quality; however, based on the scale and outreach of Jamaica Sun, Guyanese producers of these goods should determine the margin available before attempting to enter the market.



**Dried Herbs and Spices.** As stated the market for dried herbs and spices is significant in London. The major brands including Grace, Dunn's River, and Jamaica Sun all have blended spice products on the market. In addition, brands which focus solely on this market segment are available and include Tex's, McLas, and M&J Spices among others. In most cases the ethnic stores visited had the top shelves available to these brands which are very professionally labeled and packaged. However, many stores have shelf space for lesser known and more bulk labeled brands of individual spices and specialty herbs such as Mauby Bark. The spices which are the biggest sellers are the "Caribbean blends". Along side these blends is often individual dried herbs such as thyme, basil, etc. as well as packaged spices. The only case of Guyanese brand spices which could be found is Continental Brand (curry) which was maintained on the lower shelves with the bulk herbs and spices.

### Exhibit 13: Competing Products in Local Stores

#### Continental Food Stores (167 Shepherd's Bush Market)

• Malta DG Malt Beverage	35p	284 ml
• Royal Sun Coconut Water (canned)	45p	400 ml
• RTC Coconut Oil (Sri Lanka)	69p	250 ml
• Jamaica Sun Dutch Pot	£16.99	large pot
• Jamaican Sun Caribbean Honey	69p	400 ml
• Dunn's River Honey	60p	400 ml
• Bigga Fruit Punch (Jamaica)	89p	600 ml
• Encona Farina Starch	79p	500 g
• Pardo Pounded Yam	£3.49	1.8 kg
• Achar (Pachranga Foods - India)	£1.29	750 ml
• National Foods Mango Pickle	99p	320 g
• Walkerswood Jamaican Seasoning	£1.69	280 g
• Windmill Hotpepper Sauce (Barbados)	£1.79	480 ml
• Pride Pepper Sauce	69p	142 ml
• Roberts Guava Jelly	£1.19	340 g
• Chief Hot Sauce (Trinidad)	£1.29	300 ml

#### Afro Caribbean Ethnic Food Store (41 Brixton Market)

• Jamaican Sorrel Syrup	£1.89	24 fl oz
• Jamaican Sun Honey	£2.19	454 g
• RTC Coconut Oil (Sri Lanka)	69p	250 ml
• Baron Mango Concentrate	£1.99	32 oz
• Jamaica Sun Dutch Pots	£16.99	large pot
	£13.99	medium pot
	£9.99	small pot
• Dunn's River Dried Thyme	£2.99	250 g
• Baron's Banana Chips	89p	50 g
• TRS Asia's Finest Dried Shrimp	£2.29	200 g
• Baron's Essences (Banana, Almond Mixed)	99p	32 oz

#### Moon Foods Cash and Carry (183 Shepherd's Bush Market)

• RTC Almond Oil	£2.89	300 fl oz
• Coconut Oil	£1.19	500 ml
• Jefa Coconut Milk (Thailand)	50p	400 ml
• Grace Coconut Milk	59p	400 ml
• Goldenboy Sweet Chili Sauce	£1.69	23 oz
• Chief Hot Sauce "Green Seasoning"	£1.19	300 ml
• Caribbean Kuchela (Trinidad)	£1.99	250 g
• Dunn's River Jamaican Seasoning	£3.19	650 g
• Windmill Mauby	£2.29	480 ml
• McLas Vanilla (Barbados)	£1.63	16 oz
• Robert's Guava Jelly (Jamaica)	95p	340 g
• Caribbean Flavours Tea	99p	24 bags
• Mauby Bark	£2.18	500 g
• Jamaican Royal House	£2.18	28.37 g
• The New Group Casareep (Barbados)	£3.48	248 ml
• Noni Juice (Jamaica)	£4.99	300 ml
	£14.99	950 ml
• Aluminum pot with lids (unlabeled)	£9.99	large pot
	£8.99	medium pot

## E. Other Products that Could be Produced In/Exported from Guyana

Based on the interviews conducted during the survey, other potential products which could potentially be exported from Guyana (but presently are not) include:

- **Shellfish.** In 2001 the total retail sales for chilled shellfish rose 19% to £91m, according to Taylor Nelson Sofres Superpanel. The loose sector has done particularly well with species such as crab, shrimp, prawns, and scampi multiplying their sales figures. Similarly, the total sales of chilled shellfish ready meals rose 20%.<sup>18</sup> According to fish importers in London, the combination of increased demand for shellfish along with a decrease in the EU supply<sup>19</sup>, have led the importers to look further toward non-EU sources. As a result of these two factors, the price of shellfish has risen dramatically in the past year in the London market resulting in a lucrative market for shellfish. Having said this, prohibitive transport costs, and a regulatory and market demand for top quality product, require closer examination to determine potential Guyanese competitiveness in this area.
- **Dried Herbs and Spices.** As mentioned previously, many importers of dried herbs and spices have said that the market for ginger, lemon grass, and cerassie are all promising. Lemon grass in particular is at a premium currently due to the increase in interest in ethnic restaurants serving Southeast Asian cuisine.
- **Mangos.** As mentioned, the quality issues facing Guyanese mangoes are facing a large amount of the mangos on the UK market. Given the fact that Guyana is already exporting mangos to North America, this product might be afforded further export volume by tapping into the UK market for mangos.

### Exhibit 14: A Recent Add at a UK Chamber of Commerce

Cerassie tea and herbal drinks are gaining popularity in the UK as natural remedy to chronic health issues (Source: Dr. Ian Kelly of the Hull-Humber chamber of commerce). Guyana (largely due to the Dalgety tea brand) is known for Cerassie products despite the fact that the herbal drinks available are manufactured in the UK. This growing popularity is exhibited by a recent add posted to the British Caribbean Chamber of Commerce and placed in their newsletter:

*The recent outbreaks of BSE in beef have made herbal teas popular, particularly in Europe. The herbal tea known as Corila, Sorosie or Circe is traditionally used for people suffering from diabetes, high blood pressure and heart conditions. The raw material for this herbal tea grows abundantly in Guyana and can be shipped to the UK. If you are interested in importing this product please contact: Carmen Alcina, [c.alcinagallardo@hull-humber-chamber.co.uk](mailto:c.alcinagallardo@hull-humber-chamber.co.uk).*

It should be noted that once an importer is able to import fruit and vegetables into one EU country (the UK in this case), the other 15 EU countries implement the same regulations are available for the product. It isn't unreasonable to believe that, as related to all of the products described in sections [D](#) and [E](#), gaining a market in London could result in attaining market presence in Continental Europe as well. Obviously, sufficient production or volume to service several such markets must be a consideration.

<sup>18</sup> Source: The Grocer, January 2002

<sup>19</sup> primarily from a recently imposed fishing subsidy reductions for EU fishing operations

## F. Distribution Chains and Intermediaries

Many of the distributors of Caribbean products in the UK focus on specific Caribbean brands; however, there are distributors such as Enco who deal in a wide range of brands. Furthermore, many distributors limit themselves to a particular industry. This is especially true in the case of dried herbs and spices. Unfortunately, the few Guyanese processed foods found were distributed by a “man in a van” and the contact details of this person could not be obtained. Nevertheless, this middle person might be identified by working with the producers in Guyana to who have products on the London market such as Major’s, Prestige, and Continental. Distributor contact information is located in [Annex D](#).

## G. Constraints to Exporting

Constraints to exporting which were encountered include the following:

**Perception:** In many cases the Guyanese food quality and consistency of availability was questioned by importers. In one case a spice importer mentioned a previous experience of significant delays in receiving dried herbs. In another example, a whole shipment of Cerrassie was detained and destroyed as a result of improper drying. These examples and others have resulted in some cases in a perception of poor quality and inconsistent delivery by Guyanese producers. Unfortunately, the previous missteps of a few may have caused a greater barrier to market entry for current Guyanese producers.

**Non-tariff trade barriers:** The EU is noted for putting up regulations that prohibit trade. This is especially true of produce where the Common Agricultural Policy (CAP) is enforced. As tariff barriers in the European Union are reduced as a result of the trade liberalization process, access to this market is becoming more difficult due to increasingly strict regulations and market requirements for safety, health, quality, environment and social concerns.

European-wide standards in key product sectors are currently being developed to replace the multitude of differing national standards. Generally EU-wide minimum levels of requirements are set or will be set in the years ahead. Listed below is the certification required of certain products imports in the UK:

- ISO 9000 Series - certificate that demonstrates that a company has a quality management system in place according to the criteria set by the ISO 9000 series standard. Strong market requirement in certain sectors.
- EN/ISO Norms - standards that demonstrate conformity to a set level of performance. These are required for compliance with the norms in certain (technical) sectors.
- Social/Fair Trade Labels - Labels printed on the product (packaging), that the product is produced (and traded) on the basis of fair trade/social principles with respect to labor conditions and remuneration. Applicable to various consumer goods. This is an increasing market requirement, especially for labels that indicate no child labor used.
- SA 8000 Certificate- demonstrates that a company applies ethical principles for the sourcing and production of goods and services according to the criteria set by

CEPAA and based on the conventions of the ILO. Increasing importance as a market requirement.

- Codes of Conduct - written declaration of business principles mainly in relation to business integrity, social responsibility and the environment. An increasing market requirement for recognition and acceptance.
- Ecolabels- Labels printed on the product (packaging) that demonstrate environment friendly characteristics of the product and/or production process. Increasing importance as a market requirement especially for organically produced foods (see [Annex I](#)).
- ISO 14000 Series - certification that demonstrates a company has a management system in place to manufacture in an environmentally conscious way according to the criteria of the ISO 14000 standard. Increasing importance as a market requirement.<sup>20</sup>

Although in small quantities, Guyanese products are largely exempt from these non-tariff requirements. As the export to the UK increase these requirements will become more of an issue to be addressed. As such, it is important that these requirements are taken into account as Guyanese producers consider their options for export markets.

**Quality:** As stated previously, quality was cited as one of the deterrents for importers considering sourcing Guyanese produce, processed foods, and dried herbs and spices. Port Health Officials (PHOs) have the power to examine, take samples and detain consignments of food if they suspect it is in breach of food legislation. In the extreme these quality issues can cause a whole consignment to be destroyed. This action was taken in the case of improperly dried herbs from Guyana recently. Imported food is subject to routine inspection. PHOs liaise with Her Majesty's Customs and Excise (HM CE) officers and may request that a consignment, under HM CE control, is presented for Port Health examination. Consignments of imported food may be selected for examination and sampling for a number of reasons:

- type of food
- potential hazard/contamination
- country of origin
- any particular current problems (including EU Commission decisions)
- *past history of product/country*

This later reason for detaining goods based on the history of a country or a country's product line can affect a whole export segment and thus, should be taken quite seriously by the producer and exporter associations in Guyana. Detentions and destruction of consignments have a ripple effect which can and are being felt by other attempts of Guyanese businesses to enter the market.<sup>21</sup>

**Packaging:** With the exception of Dalgety products, Guyanese processed foods do not generally compare well to their Caribbean competition. In general Guyanese products

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<sup>20</sup> IS MAX. The Importance of Service Exports to Developing Countries. June 2002. [www.carib-export.com](http://www.carib-export.com)

<sup>21</sup> From time to time, when adverse conditions in a third country come to light, the EC will impose additional import conditions on particular items. This may mean that PHOs have to undertake additional checks and sampling of specific products from that country.

are currently of the same price with a lesser quality label and package. One specific example which needs to be addressed is bar codes. One shop owner complained that he could not update his register and inventory system properly because many of his products did not have valid bar codes (not just Guyanese).

The fact that most competing products in the London market are identified as Caribbean or West Indian limits the ability of targeting the Guyanese population. As a result, Guyanese goods are often in direct competition with those from Jamaica, Trinidad, and Barbados. As such, it is critical for Guyanese producers and distributors to maintain quality packaging and labeling standards equivalent or better than those of their Caribbean competitors. See Exhibit 15 for examples of the various Caribbean products on the market and their various labels.

**Exhibit 15: Various Caribbean product labeling**



**Expensive Freight:** Freight or delays in shipments has been cited as one of the factors which makes Guyanese products less attractive as opposed to their Jamaican, Bajan, or Trinidadian counterparts.

**Distribution:** Distribution agencies exist in London which could be used to gain maximum outreach of Guyanese goods. However, the inconsistent “one-for-one” distribution of Guyanese products is not only limiting their outreach but is also a frustration for retailers.

## H. Import Regulations

Importers operating in the UK customarily handle all import procedures. The following information is provided to further Guyanese exporter's understanding of the procedures and time-frames which are involved in importing into the UK.<sup>22</sup>

**General Importing Procedures.** Imports arriving in the UK must be 'presented' to HMCE by the person who brought them into the UK or the person who assumes responsibility for their onward carriage (this includes freight haulage companies, shipping and aircraft lines). Goods may be presented by:

- using an approved computerized trade inventory system linked to customs;
- or lodging Form C1600A at the designated Customs office.

<sup>22</sup> The majority of the information found in this section was provided by the United States Department of Agriculture's Foreign Agriculture Service Senior Agriculture Assistant, Phil Bicknell in London, 24 Grosvenor Square, Box 48, London, W1A 1AE, United Kingdom, Tel: +44 (0) 20 7894 0464, Fax: +44 (0) 20 7894 0031, Email: [AqLondon@fas.usda.gov](mailto:AqLondon@fas.usda.gov)

All goods must be presented within 3 hours of their arrival at the place of unloading. After presentation the goods must be covered by a summary declaration containing the information needed to identify the goods. The summary declaration should normally be made at the same customs office as presentation. The summary declaration must be made by:

- the person who conveyed the goods into the UK port;
- or the person who assumes responsibility for their onward carriage the shipping, airline or haulage company; or
- the representative of any of the above

In the UK the prescribed form of summary declaration is Form C1600. Customs may also accept commercial documents or computer records, if they contain the necessary details. Acceptable commercial documents include:

- bills of lading
- air way-bills
- container manifests
- load lists
- manifests
- consignment records (on computerized inventory systems)

All imported goods are liable to be examined by Customs. If goods are selected for examination, the opening, unpacking and re-packing must normally be done by employees of the dock company or an agent of the importer. The examination of goods normally occurs at the place where they are being declared for importation.

Customs duties and other charges that are due must be paid, deferred or secured before the goods are cleared by Customs. Charges payable on imported goods may include:

- import duties
- 'additional duties' on flour and sugar
- 'countervailing charges' on fruit and vegetables
- 'variable charges' on processed goods
- 'compensatory charges' on oils and fats
- 'extra charges' on eggs, poultry or pig meat
- 'sugar levies' on processed goods with sugar in them
- Value Added Tax (VAT)
- excise duty on alcoholic beverages

The charges payable are linked to the Commodity Code (similar to an HS code, but more detailed) for a particular product. Guyanese exporters will need to find out what the Commodity Code for their product, and the associated import duty, is likely to be. This estimated cost may be useful as well in determining a pricing strategy for the product.<sup>23</sup>

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<sup>23</sup> To obtain the Commodity Code, contact H.M. Customs & Excise, Tariff Classification Helpline on Tel: 011 44 1702 366077. This service gives a verbal reading on the appropriate code and respective import duty for a particular product. It is also possible to obtain a written ruling on the product's Commodity Code known as Binding Tariff Information (BTI). This is available directly from Customs & Excise on the telephone number given above. It is also possible to look up the

**Import Licensing and Controls.** As a member of the EU, the UK has a number of requirements for food and agricultural imports entering the country. Issues regularly encountered by Caribbean exporters include labeling, lists of permitted ingredients, packaging law and import requirements, such as health certificates, licenses and duty. The Department of Trade and Industry (DTI) is responsible for import licensing policy in the UK. Labeling and packaging regulations are described in more detail below.

If a business intends to import goods into the UK it must first register that intention with the Department of Trade and Industry's Import Licensing Branch, which issues licenses to import goods. The most common license is an Open General Import License (OGIL), and allows an importer to import most goods. However, some goods require special licenses, for example bananas, textiles and clothing, and these are issued for specific items by the DTI in accordance with EU law. In addition, other permits or certificates may be needed to import certain goods.

Most Guyanese goods are included in the OGIL and may be imported without further formalities. Some goods, however, are excluded from the OGIL and, exceptionally, require a specific license for importation. The principal exceptions are: bananas, certain textiles and clothing.<sup>24</sup> Some other restrictions are applied for non-economic reasons such as health, safety, environmental or social policy.

UK Import Licenses are required for the following fresh produce: fresh garlic, fresh sour cherries and bananas. Also for the following processed produce:

- wine
- preserved mushrooms in brine, vinegar or other preservative solutions
- sultanas or other dried grapes
- preserved cherries in brine or other preserved solutions
- frozen cherries
- prepared or preserved tomatoes (not by vinegar)
- asparagus
- peaches
- orange juice

Agricultural goods from Guyana may be subject to import licensing and import charges under the CAP. Licenses are issued by the Intervention Board Executive Agency (IBEA). CAP licenses from the IBEA are needed to import agricultural goods from Guyana into the UK.<sup>25</sup> Import procedures are laid down by HM C&E. The procedure is routine, although a Customs declaration on paper (known as the 'entry') has to be made for each consignment. This is in order to assess the duty, consider claims for relief and facilitate

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Commodity Code and relevant import duty for your product on the Internet at: [http://europa.eu.int/comm/taxation\\_customs/dds/cgi-bin/tarchap?Lang=EN](http://europa.eu.int/comm/taxation_customs/dds/cgi-bin/tarchap?Lang=EN)

<sup>24</sup> Source: Department of Trade and Industry - Enquiries about licensing should be addressed to the DTI on 0171 215 5000

<sup>25</sup> Details of import procedures for agricultural goods are given in IBEA leaflet ET1 and Customs Notice 780.

checks on controlled goods. Methods of making an entry have been computerized at most locations in the UK. Customs Notice 501 contains a brief outline of facilities and procedures for imports.

Import licenses are issued by the UK's Intervention Board, contact details can be found in [Annex E](#). Import licenses are not required for small quantities of the previously mentioned products (100 - 500 kg dependent upon product type). Allow at least 10 days to apply for an import license, which will be valid for three months from their date of issue.

**VAT, Customs and Duties on Imports to the UK.** As in other EU countries, VAT is charged in the UK. HMCE is the Government department with responsibility for collecting VAT, other taxes, and customs duties on imported goods. Most goods imported from Guyana are entitled to a nil or reduced rate of customs duty if they fall within the scope of the EC's preferential trade arrangements and the relevant origin rules and conditions have been met. These trade conditions are described in greater detail below.

Importers of Guyanese products must register for VAT if, at the end of any month, their gross turnover from taxable supplies has exceeded a threshold (currently £49,000) in the preceding twelve months or less; or at any time there are reasonable grounds for believing that their taxable turnover will exceed the threshold in the next 30 days. Importers with a taxable turnover below the threshold may apply for voluntary registration. Imports of Guyanese goods into the UK are subject the same rate of VAT as internal suppliers.

The UK has two rates of VAT at 17.5% and 5%. The higher rate applies to all products entering the UK from Guyana. Taxable persons must charge this rate on all the goods and services they supply. Customs officers in the UK do not classify or reclassifying importers' goods. Importers of Guyanese products are legally obligated to classifying their goods correctly.<sup>26</sup>

**Preferential Trade Status.** There are several procedures which allow an importer to get reductions in duties or charges on goods. These include:

- Processing under Customs Control for Free Circulation (PFC), which allows an importer to obtain relief from certain duties and other charges when he intends to process the goods further—for example, imports of raw materials for use in the manufacture of finished goods
- Inward Processing Relief (IPR), which provides relief on duties and charges where a manufacturer produces goods from materials imported into the European Union and then exports the finished products outside the Union.
- The Generalised System of Preferences (GSP), which encourages developing countries to export by giving them preferential duty rates and removing tariffs and quotas. Products are classified according to their level of sensitivity, which

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<sup>26</sup> Assistance on classification of goods can be found at the Classification helpline (01702 367 330). Information on VAT on imports of goods is contained in Notice 702 VAT: Imports and warehoused goods

affects the rate of reduction in duty. Some countries receive the full benefits of GSP; however, Guyana is not on the GSP's Least Developed Countries (LDCs) list.

The UK, through the EU, has trade arrangements with many countries in the African, Caribbean and Pacific countries (ACP) including Guyana. These cover most products and provide for goods satisfying the EU's rules of origin to enter at a reduced or zero rate of duty. Under the EU's Generalised System of Preferences (GSP) a wide range of goods meeting the rules of origin may be imported from developing countries including Guyana, at reduced or zero rates of duty. Therefore many Guyanese imports enter the UK on preferential tariff terms. The GSP aims to, "encourage developing countries to export by allowing their products preferential access to the markets of developed countries". Although donor countries are under no obligation in international law to give preferences, almost all developed countries operate GSP schemes; however, the schemes they offer vary significantly, both in the way in which they work and in their product and country coverage. LDCs<sup>27</sup> have duty free access for all eligible products listed in Annex I of the Regulation and reduced rates on their exports; however, Guyana is not listed as a least developed country according to GSP.

In order to claim GSP, a GSP certificate of origin (Form A)<sup>28</sup>, duly signed and stamped by the appropriate authorities in the beneficiary country must accompany the products.

**Warehouse arrangements for imported goods.** Dutiable goods imported into the UK can usually be stored in warehouses approved by Customs and Excise without payment of the duties or VAT due at import. Such goods can also be sold in the warehouse (other than retail sales) or transferred to another warehouse. Duty and VAT must be paid at the time goods are delivered for use in the UK or, under deferment arrangements, within a fixed time afterwards. Deliveries for re-export outside the EU are free of all duties and VAT. Various warehouse arrangements are available to importers of Guyanese goods including:

- Customs warehouse: for storing non-EU goods which are chargeable with import duty and/or VAT or otherwise not in free circulation.
- Excise warehouse: For storing goods liable to excise duty, whether home-produced or imported.
- Customs and Excise warehouse: For storing goods in both of the categories above.
- Type E warehouse is a form of private warehouse in which a company and its commercial accounting and stock control systems are authorized.

**Food Safety Laws.** In terms of food law, the UK must generally conform to all EU Directives, Regulations and obligations. It is then incumbent upon the UK to put these directives, regulations, and obligations into law. The marketing and sale of foodstuffs in the UK is governed by the Food Safety Act 1990. The Act makes it an offence for anyone to sell, or possess for sale, food which:

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<sup>27</sup> Listed in Annex IV of the GSP

<sup>28</sup> which can be found at: <http://www.export911.com/e911/export/docFormA.htm>

- has been rendered injurious to health is unfit or so contaminated that it would be unreasonable to expect it to be eaten
- is falsely described, advertised or presented
- is not of the nature, substance or quality demanded

Under this Act detention and seizure of suspect food and food hygiene inspections are enforced. Imported foods can be inspected for safety at any point in the distribution chain, port of entry (by Port Health officials), retail, foodservice or wholesale level (by Trading Standards Officers).

Importers of Guyanese products can look to the regional trading standards office for advice, guidance and information on consumer protection, trading standards, food safety and composition and regulatory best practice. There are over 70 such regional trading standards offices located throughout the UK. These are all under the umbrella of the Local Authorities Coordinating Body on Food and Trading Standards (LACOTS).<sup>29</sup> Importers should liaise with the local trading standards office when introducing Guyanese products to the market. These decentralized offices operate from The "Home Authority Principle" and are the primary resource in seeking to resolve composition and labeling issues on Guyanese food products.

The UK Food Standards Agency oversees all aspects of food safety and standards. The Food Standards Act 1999 provides for the Agency to be a UK body accountable to Parliament, the Scottish Parliament, and the National Assembly for Wales and the Northern Ireland Assembly. The Agency sets and audits standards for the enforcement of food law by local authorities. A document entitled "Food Law Guide" produced quarterly by the Food Standards Agency is available. This lists all UK food regulations known at that time in one document. It can be downloaded from the following website as a .PDF document: [www.foodstandards.gov.uk/regulations/foodlaw.htm](http://www.foodstandards.gov.uk/regulations/foodlaw.htm) Annex E provides the contact information for the UK Food Standards Agency.<sup>30</sup>

**Labeling Requirements.** Labeling requirements fall under the Food Labelling, Standards and Consumer Protection Division of the Food Standards Agency.<sup>31</sup> UK general labeling requirements are set forth in The Food Labelling Regulations 1996 and The Food Labelling Regulations 1998 to be given on food labels for certain ingredients or categories of ingredients used in foods.

As mentioned earlier, all food products must comply with the general requirements of the Food Safety Act in that they must not contain any harmful substances or be described in such a way as to mislead the consumer. False claims and descriptions are forbidden under the Trade Description Act. Enforcement of the labeling laws is carried out by the Trading

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<sup>29</sup> <http://www.lacots.org.uk>

<sup>30</sup> All regulatory documents cited in this report are available from the UK government's Stationery Office web site: <http://www.hmsso.gov.uk>. It is also possible to order a hard copy of the regulation from The Stationery Office - fees vary depending on the size of the regulation, but are normally between \$3-10. Annex xx provides the contact details for this office.

<sup>31</sup> Guidance notes have been compiled on many labeling topics and are available at [http://www.foodstandards.gov.uk/farm\\_fork/label.htm](http://www.foodstandards.gov.uk/farm_fork/label.htm)

Standards Office of the Local Council to where the UK importer/agent/manufacture is based.

[Annex I](#) provides a basic overview of the type of requirements necessary for a label acceptable in the UK

**Packaging and Container Regulations.** Legislation governing weights and measures comes under the jurisdiction of the UK's Department of Trade & Industry (Consumer Affairs Directorate) - contact details are provided in [Annex E](#). At a local level enforcement is through Trading Standards Officers. Orders made under Section 22 of the UK's Weights and Measures Act 1985 require most pre-packed food to carry on the container an indication of the net quantity of the contents. When sold other than pre-packed, most food is required to be sold either by quantity or by number. Orders made under the Act also limit the quantities in which certain goods (known as prescribed ranges) may be pre-packed when offered for retail sale.

All weights and measures must be given in metric units, followed by the imperial equivalent if so desired. Annex I provides the appropriate abbreviations for imperial and metric units. The Act also contains type size requirements for indications of both weight and volume, and provides for the 'average' system of quantity control for pre-packed goods, which is designed primarily for application at the point of production or importation and which is indicated next to the weight declaration on the pack by the symbol "e". It requires the packer or importer to ensure that the packages will pass an Inspector's reference test.

The UK has implemented the European Directive on Packaging and Packaging Waste (94/62EC) through The Producer Responsibility Obligations (Packaging Waste) Regulations 1997. The UK must meet targets for recovery of packaging waste and recycling of packaging materials in packaging waste each year. UK importers are affected as part of the "packaging chain". Each stage of the "packaging chain" (this is from packaging raw materials manufacturers through to wholesale/retail sellers) is responsible for achieving a different percentage of the whole target e.g. UK importers importing packaged goods to sell are responsible for 53% of the targets on recovery and recycling.

There are also The Packaging (Essential Requirements) Regulations 1998. The main requirement is that no person responsible for packing or filling products into packaging or importing packed or filled packaging into the UK may place that packaging on the market unless that packaging fulfils the Essential Requirements and the Heavy Metal concentration limits. Annex I provides a summary of the requirements for the Essential Requirements regulations.<sup>32</sup>

**Food Additives Regulation.** UK food additive regulations implementing EU legislation and recommendations of the UK's Food Advisory Committee are covered by the Food

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<sup>32</sup> The UK's Department of Trade and Industry has issued Guidance Notes on these regulations available at - <http://www.dti.gov.uk/access/guidehh.htm>

Standards Agency's Additives and Novel Foods Division. The main food additive regulations in the UK (which contain positive lists of permitted additives) are listed in Annex I. To ensure that Guyanese products comply it is necessary to consult this documentation, or alternatively contact the Food Standards Agency's Additives and Novel Foods Division (see [Annex E](#) for address details).

**Pesticides.** UK pesticide regulations, which implement EU legislation, are drawn up by the UK's Pesticide Safety Directorate, an executive agency of the UK's Department of Environment, Food and Rural Affairs (DEFRA).

The major piece of UK legislation regarding pesticides is known as: The Pesticides (Maximum Residue Levels In Crops, Food and Feeding Stuff) Regulations 1999. These set maximum residue levels (MRLs) for fruit and vegetables, cereals and animal products and came into force February 1, 2000.

**Other contaminants.** The UK has other regulations dealing with the chemical safety of food with regard to aflatoxins, arsenic, chemical contaminants, chloroform, extraction solvents, lead, mineral hydrocarbons, tetrachloroethylene, tryptophan, and veterinary medicine residues in animal and animal products.<sup>33</sup>

**Food That Has No Animal Content.** Food that has no animal content is covered by The Imported Food Regulations 1997. The IFRs require that imported food from third countries such as Guyana must not be unsound or unwholesome (for example, over ripe fruit which does not meet the legal requirements). Health certificates are generally not required for the import of food that has no animal content. Imports of nuts, nut products, dried figs and dried fig products must comply with the Aflatoxin in Nuts, Nut Products, Dried Figs and Dried Fig Products Regulations 1992 and import of pistachio nuts must only be through specified Border Inspection Posts.

**Food containing Animal Products.** The import of food products of animal origin are covered by the Products of Animal Origin (Import and Export) Regulations 1996. Imports from Guyana may only enter the UK/EC through approved Border Inspection Posts where they will be checked to ensure that they comply with the relevant animal and public health regulations. These imports must also meet the requirements of the Food Safety Act 1990. All animal products (except fresh red meat) imported into the UK must be imported under the terms of an import license issued under The Importation of Animal Products and Poultry Products Order 1980 (as amended).<sup>34</sup>

## I. Organic

The UK's retail market for organic food is substantial and growing. It reached £802m in the last year, and grew by 33% in 2001. The UK market is expected to continue to grow and continue to be the fastest sales growth of any European country. Supermarkets took

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<sup>33</sup> A list of these regulations is available as part of the Food Law handbook available at: [www.foodstandards.gov.uk/regulations/foodlaw.htm](http://www.foodstandards.gov.uk/regulations/foodlaw.htm)

<sup>34</sup> Source: A detailed guide on UK import requirements on food of animal origin can be obtained from: [www.defra.gov.uk/animalh/int-trde/prod-im/vet-chks.htm](http://www.defra.gov.uk/animalh/int-trde/prod-im/vet-chks.htm).

£641m of those sales, with three quarters of households making at least one organic purchase during 2001. The number of companies licensed to produce organic food has risen by more than 50% to 1,675 and the area of UK land in full organic production has more than doubled from 103,000 hectares to 240,000 hectares. Imports of organic goods comprise 70% of the market but are decreasing as UK producers meet this growing demand. For the first time some organic eggs are being imported and 85% of fruit and vegetables are still imported.<sup>35</sup> Annex K provides further data pertaining to this market.

A word of caution to prospective importers of Guyanese products about this growing market is that the market is dominated by the seven largest supermarket chains, which now account for 80% of organic food sales.<sup>36</sup> In fact, many of the UK's organic food producers worry that the supermarkets will deplete the current price premiums for organic foods. As a recent Soil Association report says, "The implications of downward price pressure is that producers will find it increasingly difficult to economically supply to these markets or farmers will be forced to shave the costs of production. Both outcomes would jeopardize long term sustainability for UK supermarket suppliers."<sup>37</sup>

Further market analysis shows that sales through farm shops have decreased by 6%, although the number of farmers' markets and city markets (such as Brixton and Shepherd's Bush) are expanding. Independent retailers, including health food shops, lost market share, down from 13% to 11%, but they are actually doing more business with sales up from £78m to around £90m.<sup>38</sup>

The UK Register of Organic Food Standards (UKROFS) is the main UK organic regulatory agency. It was established in 1987 to provide baseline organic standards and to approve and monitor the work of organic certification bodies. It has a Board of independent people appointed by Agriculture Ministers and a secretariat within the Ministry of Agriculture, Fisheries and Food.<sup>39</sup> UKROFS standards are the minimum standards which apply in the UK and are based on the EC Regulation 2092/91 which sets the organic standards for the UK. Since 1992 the role of UKROFS has focused increasingly on becoming established as the UK authority responsible for ensuring that EC organic standards are properly applied in the UK by the various approved certifying authorities which register organic farmers and processors.<sup>40</sup>

Regulation 2092/91 sets rules for organic farmers and requires anyone involved in the production of organic food (like farmers and growers), processing it (including packaging and labeling) or importing from "third countries" such as Guyana, to be registered with an approved organic certification body and subject to at least annual inspections by them. In short, regulation 2092/91 sets out the inputs and practices which may be used in organic farming and growing, and the inspection system which must be put in place to ensure this. This Regulation also applies to processing, processing aids and ingredients in

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<sup>35</sup> Source: the Soil Association's Food and Farming Report 2001.

<sup>36</sup> As a comparison these 7 chains control more than two-thirds of the UK's grocery retail share

<sup>37</sup> IBID

<sup>38</sup> Source: *Organic Business*, December 2001

<sup>39</sup> Source: <http://www.defra.gov.uk/farm/organic/ukrofs/ukrofmem.htm>

<sup>40</sup> Source: A report on the UK's Organic Food Market was produced by USDA London in March 2000, this can be found at [www.fas.usda.gov](http://www.fas.usda.gov) under Countries/Market Reports/Attaché Reports.

organic foods. All food sold as organic therefore must originate from growers, processors and importers who are registered with an approved body and subject to regular inspection.<sup>41</sup> All organic produce which enters the EU from other countries must comply with the same minimum rules.

The European Commission has recognized that a few third countries operate production rules and a system of inspection for some products equivalent to those operating within the EU – this list does not currently include Guyana.<sup>42</sup> The rules for imports from these countries are laid down in Article 11(1) of Council Regulation (EEC) 2092/91. Although Guyana is not currently listed as a recognized country by the European Union, as explained previously the Prince of Whales is currently sponsoring an organic cocoa project in Guyana. Thus, Guyana has in this small way begun to make an inroad to the UK organic market.<sup>43</sup>

Imports of the specified organic products into the UK are permitted without prior approval from UKROFS provided that:

- the importer is registered with one of the UK organic certifying authorities approved by UKROFS; and
- each consignment of the imported product is accompanied by a certificate issued by one of the approved inspection bodies from the third country listed in the Annex to Regulation (EEC) 94/92 as amended.

In the UK the following bodies have been approved by and are subject to monitoring by UKROFS (UKROFS also has a scheme for direct registration):

- Biodynamic Agricultural Association
- CMi Certification
- Food Certification (Scotland) Ltd
- International Certification Service (GB) Ltd trading as Farm Verified Organic
- Irish Organic Farmers and Growers Association
- Organic Farmers and Growers Ltd
- Organic Food Federation
- Organic Trust
- Scottish Organic Producers Association
- Soil Association Certification Ltd

For Guyana to be approved by UKROFS, a certifying body needs to show that Guyanese production standards comply with the EC Regulation and demonstrate its competence to run an inspection system. Ongoing monitoring is carried out by two means: UKROFS carries out audit inspection on a proportion (about 5%) of operators certified by the body.

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<sup>41</sup> Source: <http://www.defra.gov.uk/farm/organic/reg2092consol.pdf> (the consolidated version of Council Regulation (EEC) 2092/91 together with its Annexes). The UK Register of Organic Food Standards (UKROFS) administers the Regulation (as amended) in the UK.

<sup>42</sup> These countries, the products, and their approved inspection bodies are listed in the Annex to Commission Regulation (EEC) 94/92 (327 kb), as amended.

<sup>43</sup> Source: Commission Regulation EC 94/92 which can be found at: <http://www.defra.gov.uk/farm/organic/imports/creg94-92.pdf>

These are compared with the annual inspection reports done by the body itself. This is to show how far the body is correctly implementing the requirements of the EC Regulation at the enterprise concerned. A check is also carried out at the headquarters of the body to ensure that their administrative arrangements are adequate.

There are two systems which allow for the import of organic goods. Firstly, exporting countries may demonstrate to the European Commission that they have certification systems meeting the requirements of the EC Regulation. Six countries have done this: Australia, Argentina, Czech Republic, Hungary, Israel and Switzerland. Imports may take place freely, though the inspector must be registered with an organic certifier.

The second system, which applies to Guyana, is that the importer of Guyanese goods must make an application to UKROFS providing copies of the standards and control procedures applied by the overseas certifier. Equivalence to EN 45011 and to Regulation 2092/91 must be demonstrated.

Produce from Guyana can potentially be brought into the EU and marketed as organic, provided prior authorization has been obtained. Importers wishing to apply for an Authorization to Import Organic Products into the EU must complete an OB6 application form. There are also Guidance notes on how to complete the OB6, which should be read before an OB6 is completed. The OB6 application asks importers to provide details of the rules of production, the rules of inspection and the penalty provisions of the inspection/certifying bodies used in the third countries.<sup>44</sup>

Regulation 2092/91 sets out the exact principles allowing for a product to be labeled organic. For example the regulation:

- lists processing aids and non-agricultural ingredients which may be used;
- lists various food products not yet available in organic form. These can be used at a level of up to 5% of the total agricultural ingredients (the ingredients list must make clear which items are organic). At levels between 5% and 30% of these non-organic ingredients the label must show clearly the total organic agricultural ingredients, for example, "Muesli contains 80 organic agricultural ingredients";
- allows other, mostly natural, inputs from outside organic farming to be used if full fertility cannot otherwise be achieved. These are listed in Annex IIA of the Regulation.
- requires two years before the first planting of crops to be sold as organic or in the case of perennial crops (fruit trees etc) three years before the first harvest of a crop to be sold as organic.

New rules for organic food regulation are currently being considered including the labeling of all processing aids and "hidden" processing methods. In future, the Soil Association may take a greater role in organic production and UKROFS might be dissolved. According to Soil Association standards and technical director Francis Blake,

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<sup>44</sup> On 30 November 2001 a [letter](#) to all importers giving details of the new requirements was developed.

these changes to organic regulations will include issues such as packaging, higher standards and closer regulations of imported organic products.<sup>45</sup>

## **J. Next Steps to Access the London Market**

First, brief feasibility studies on enhancing the production and export of Cerassie and new dried herbs and spices such as ginger and lemon grass should be developed. Also an analysis of aluminum pots and wooden cooking utensils, along with shellfish should be conducted. These analysis should assess the comparable cost of production, transport, and distribution.

Second, producer and trade associations along with GO-Invest in Guyana should be encouraged to participate in upcoming UK trade fairs, and missions to investigate the markets identified by this study further and to address the reputation and perception of Guyanese goods. Along these lines, the GO-Invest and private sector associations should be encouraged to become active with the British trade associations focused on the UK. The lack of Guyanese exposure to these associations is apparent in the British-Caribbean Chamber of Commerce's omission of GO-Invest in their "useful contacts" listing despite their citation of TIDCO, JAMPRO, and BIDC as "useful contacts". This omission is just one small example of the need for greater exposure of Guyanese producers and their products in the UK market.

Third, form a freight user's group and bring an expert to analyze transportation of export cargo and make recommendations for improving it.

Fourth, encourage and help exporters to improve the quality of their products and their packaging, labeling and export packing. Importation of packaging and packing materials should be liberalized. Identification of all of the appropriate Guyanese and regional producers of labels and packaging should be gathered for prospective exporters. Experts and actual buyers should be made available for advisory services as Guyanese producers revamp their product packaging, labeling, and marketing approach.<sup>46</sup>

Fifth, the Government of Guyana should support and encourage exporting. Specifically, the Government should work with Agencies such as Customs to ensure the most streamlined system possible. Further, a cold storage facility and hot wash facility should be a priority for the Government and private sector association alike.

Sixth, exporters should be offered orientation, training, and special recognition if they make significant contributions to the country's income, employment and foreign exchange earnings.

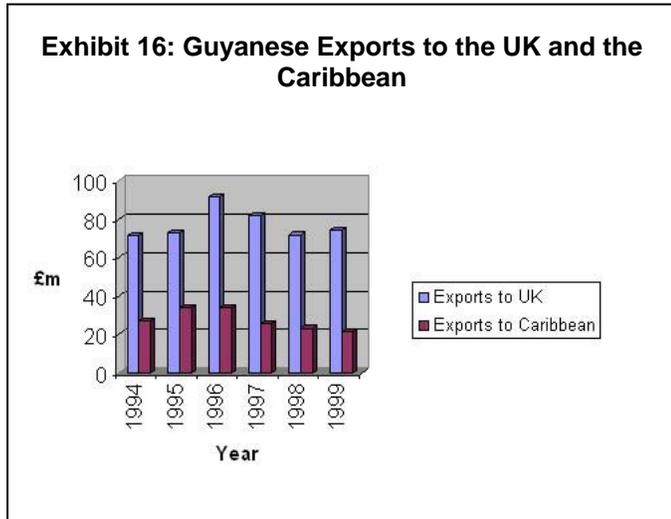
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<sup>45</sup> Source: Health Food Business, December 2001

<sup>46</sup> Another resource discovered during the development of this study - Guyana can request the WTO Secretariat to inform them of notifications on topics of particular interest. For information on standards and technical regulations in CARICOM countries contact the TIC's Cora Lowe at Clowe@carib-export.com

Seventh, a market study of this same type should be conducted for the Caribbean. As illustrated by the data shown in the [Executive Summary](#) and the Exhibit 14, the collective Caribbean market is the fourth largest for Guyana officially and may be even larger if informal trade is considered.

Finally, one page fact-sheets on specific export opportunities, their potential market viability, the contacts in the UK which might prove useful in gaining market entrance, and the quality issues associated with the respective products should be developed. These fact-sheets should be complimented by those for Toronto and New York.



Attaining the objectives outlined above requires prioritization, preparation, and a sense of expected outcome. Planning and preparation improves feedback and effectiveness of the initiative. Some possible objectives include:

- To establish or increase export sales;
- To test new product designs in terms of style, quality, price and suitability to the target market;
- To take orders from trade buyers;
- To inform the audience about Guyana’s labor skills, products and production capabilities;
- To maintain contact and promote goodwill with established customers;
- To build upon the identified market channels in this study such as agents, distributors, wholesalers or retail chains, independent retailers;
- To further develop information about market trends.<sup>47</sup>

<sup>47</sup> Source: ITC. Trade Secret Series. Export Quality Management; An Answer Book for Small and Medium Sized Exporters Goals of Trade Fairs participation

## ANNEX A: Markets in London relevant to Guyanese Exporting

**Berwick Street Market** - Berwick Street, W1, 020-72894371/07956384124, 020-7224 2833  
Berwick Street is one of London's finest fruit, vegetable and fish markets.

**Billingsgate Fish Market** - West India Docks, E14, 020-72894371/07956384124, 020-7224 2833  
London's primary fish market

**Brick Lane** - Bethnal Green Road and, Cheshire Street and, Brick Lane, E1 / E2, 020-2894371/07956384124, 020-7224 2833  
Brick Lane is known for cut-price bric-à-brac, clothes, fruit and vegetable

**Brixton Market** - East of Brixton Road and, Electric Avenue and, Granville Arcade, SW9  
020-72894371/07956384124, 020-7224 2833  
Fruit and vegetable, clothes and records in this six days a week popular market. Since the arrival of the West Indian population in the 1950s and 1960s, Brixton Market has been the place for Afro-Caribbean foodstuffs especially along Electric Avenue, while the African and Asian fabrics are also worth a look.

**Columbia Road** - Columbia Road, E2, 020-72894371/07956384124, 020-7224 2833  
Known for flowers and plants sold direct to the public.

**East Street Market** - East Street, SE17, 020-7375 0441  
General, fruit and vegetable at lower-than-supermarket prices.

**Gabriel's Wharf** - 59 Upper Ground, SE1, 020-7375 0441  
Gabriel's Wharf is a thriving market for new designers and jewelers.

**Oxo Tower** - Bargehouse Street, Southbank, SE1020-7515 7153,  
Oxo Tower is a center for contemporary textile designers, jewelers and enamellists.

**Roman Road Market** - Roman Road, E3, 020-7515 7153  
One of the largest and oldest of the East End markets, marred only by inaccessibility by public transport.

**Shepherd's Bush Market** - Between the Goldhawk, and Uxbridge Roads, W12, 020-7515 7153 (see Exhibit 15)  
Eclectic market selling clothes with food stores and stalls with ethnic focus. It divides into two parallel streets: the original market and 'New Shepherd's Bush.

Exhibit 17: Shepherd's Bush Market



## ANNEX B: 1991 UK Census Figures for the Greater London Area

	Ethnic group - percentage: Black Caribbean
GREATER LONDON	4.4%

<b>Footnotes</b>	
1 -	<b>Note: No comparable statistics available for 1981</b>

	Total persons = 100 per cent
GREATER LONDON	6679699

From: [www.statistics.gov.uk](http://www.statistics.gov.uk) – the UK national census bureau

### ANNEX C: Retailers Selling Caribbean Food and Products in the UK

<b>Business Name</b>	<b>Contact Information</b>
<b>Afro Caribbean Ethnic Food Store</b>	41 Brixton Market
<b>Bess Bakery</b>	140 Aicker Lane, 1214 Brighton Terrace and in the Brixton Market
<b>The Bixtonian</b>	11 Beehive Place, Brixton SW9
<b>Caribbean Take Away</b>	616 Harrow Road, W10 4NJ
<b>ChiliWorld</b>	Buddy Garcha e-VON Limited 6 Beech Vale Close Torrington Park Finchley N12 9AW England Tel: 07956 314734 <a href="mailto:buddy@chiliworld.com">buddy@chiliworld.com</a> <a href="http://www.chiliworld.com">http://www.chiliworld.com</a>
<b>Continental Food Stores</b>	167 Shepherd's Bush Market
<b>Curry Direct</b>	14 Carr Lane, Slaithwaite, Huddersfield HD7 5AN Tel: 01484 842365 Fax: 01484 842365
<b>Fats</b>	178 Shirland Road, W9 0171-289 3884
<b>Guyanese &amp; West Indian Takeaway</b>	148 Plumstead Rd London SE18 7DY 020 8854 5115
<b>Moon's Food Cash &amp; Carry</b>	183 Shepherd's Bush Market
<b>Raul Limited Off Liscence Grocer</b>	2224 Brixton Market
<b>Strawberry Hill Fruiterers</b>	163 Shepherd's Bush Market
<b>Super Malt Superstores</b>	Brixton Market, 0207 733 2867
<b>World Foods</b>	Malcolm and Debbie Jones – Owners 181 Penarth Road Grangetown Cardiff Wales UK CF11 6JW Tel:+44 (0) 29 20 394618 <a href="http://www.world-foods.co.uk">http://www.world-foods.co.uk</a>
<b>Yum Yum's</b>	312 Ladbroke Grove, W10 6HB Tel/Fax

## ANNEX D: Caribbean Product Brands in London and their Distributors

Brand Name	Notes	Contact Information
<b>BMAC</b>	<b>Products in the London market: Plantain Chips among others.</b>	BMC Food Processing Co., 3 Lackwood Way, Walthamstow, London E17 5RB, 020 8523 5100, 020 8523 5600 (fax)
<b>Busha Browne's Fine Jamaican Produce -</b>	<b>Jamaican hot sauces, jams, pepper jellies, condiments, chutneys, vinegars and jerk sauces.</b>	Busha Browne's Company Ltd. P.O. Box 94, Spanish Town, Jamaica (876) 984-2610/3897, fax, (876) 984-3896 <a href="http://www.caribplace.com/foods/bushab.htm">http://www.caribplace.com/foods/bushab.htm</a>
<b>Caribbean Food Emporium</b>	<b>Caribbean Food Emporium has various functions detailed below.</b> 1) Information Provider 2) Promotion 3) Consultancy 4) Caribbean Food Sales 5) Forum 6) Events	Caribbean Food Emporium 1 Fairlop Road Barkingside Ilford Essex IG6 2EE Tel 0208 550 6848 Email: <a href="mailto:caribbeanfoodemporium@yahoo.co.uk">caribbeanfoodemporium@yahoo.co.uk</a>
<b>Chief (Trinidad)</b>	<b>Products in the London market: Green Seasoning, Spices, and Tea among others.</b>	Uriah Butler Highway, Charlieville, Chaguanas, Trinidad, West Indies, 868-665-4144, 8880665-5006 (fax), <a href="http://www.chief-brand.com">www.chief-brand.com</a>
<b>Dalgety</b>	<b>Products in the London market: Tea, Cerassie, and Plantain Crisps among others.</b>	Dalgety Caribbean Products Regent Business Centre, 291 Kirkdale, Sydenham, London SE26 4QD, 44 90 020 8659 0015  Distributed by: Enco Products Ltd. WT House, Bessemer Road, Welwyn Garden City, Herts AL7 1HT, 44(0) 1707 326555, 44(0)1707 382940 (fax)
<b>Dunn's River</b>	<b>Products in the London market: Jerk Seasoning among others.</b>	Enco Products (see below)
<b>Enco Products Ltd. (Part of the W.T. Foods Group)</b>	<b>Enco sees its role as enhancing and widening the appeal of the Caribbean food category. Among its portfolio of brands are: Nourishment - a milk based energy drink, Encona Hot Pepper Sauces, Dunn's River ingredients and condiments and Mighty Malt tonic drinks. Enco is now a division of WT Foods</b>	Enco Products Ltd 1-2 Apex Point, Travelers Lane, Welham Green, Hatfield Herts AL9 7HF  Tel: 01707 272775
<b>Fassy Foods</b>	<b>Products in the London market: Plantain Crisps</b>	Fassy Foods 6 Lavender Road, London SW11 2UG
<b>Grace, Kennedy</b>	<b>Range of exports includes a number of items under the Grace label as well as other Grace owned brands. Products include jams, jellies, sauces, condiments, juices, nectars, meats, powdered chocolate drinks and drink mixes as well as a variety of fresh produce.</b>	Aaron House 6 Bardolph Road Richmond, Surrey, TW9 2L
<b>Jamaica Standard Products Company Limited</b>	<b>Producers of coffee, sauces and spices and liqueur.</b>	Standard Products Limited, Williamsfield, Manchester Jamaica, West Indies, Tel: (809) 963-4211/Fax (809) 963-4309, <a href="mailto:intamc@cwjamaica.com">intamc@cwjamaica.com</a> ,

		<a href="http://www.caribplace.com/foods/jsp cl.htm">http://www.caribplace.com/foods/jsp cl.htm</a>
<b>Jamaica Sun</b>	<b>Products in the London market: Coconut Milk among others.</b>	Caribbean Imports PO Box 20315 London NW11 OWT
<b>Major's (Guyana)</b>	<b>Products in the London market: Cassareep</b>	13 Victoria E.C.D., Guyana
<b>Pulses &amp; Grains Ltd.</b>	<b>A UK based company, an importer/exporter and wholesale distributor of ethnic health foods to the European markets. Thousands of products including: beans, lentils, dried fruits and nuts to spices, exotic tinned vegetables as well as ready cooked Asian and Oriental foods, pickles and sauces.</b>	Pulses & Grains Limited. 57 Gorst Road, Park Royal, London NW10 6LS.UK Tel:+44 (0)20 8961 5944 • Fax:+44 (0)20 8961 5925 E-mail: <a href="mailto:sales@pulsesandgrains.co.uk">sales@pulsesandgrains.co.uk</a>
<b>Silbury Marketing Limited</b>	<b>Silbury Marketing Ltd. is an international trading company supplying high quality food ingredients to food manufacturers, distributors and retailers. Our product range includes tomato products, specialist vegetable fats, flavored vinegars, specialist marine oils, ethnic pastes, organics and specialist edible oils. Products in the London Market:</b> <b>Ethnic Pastes</b> <b>Flavored Oils</b> <b>Organic Products including:</b> <b>Organic Tomatoes Chopped &amp; Paste</b> <b>Organic Pasta Various Shapes</b> <b>Organic Edible Oils</b> <b>Organic Palm Oil</b> <b>Organic Margarine</b> <b>Organic Sugar</b> <b>Organic Garlic</b> <b>Organic Ginger</b> <b>Organic IQF Vegetables</b> <b>Organic Juice Concentrates</b>	Silbury Marketing Limited 2000 2, Trinity Mews, Priory Road, Warwick CV34 4NA Tel: +44 (0) 1926 410022 Fax:+44 (0) 01926 476200 email: <a href="mailto:info@silbury.co.uk">info@silbury.co.uk</a> <a href="http://www.silbury.co.uk/">http://www.silbury.co.uk/</a>
<b>Sujata (Guyana)</b>	<b>Products in the London market: Curry Powder</b>	Continental Industries Ltd. 10-12 Industrial Estate, Rulmveltd, Georgetown, Guyana
<b>Walker's Wood (Jamaica)</b>	<b>Walkerswood was the first company to export Jerk Seasoning from Jamaica. They produce a range of over 15 authentic Caribbean sauces, seasonings, spices, condiments and canned vegetables.</b>	Walkerswood Caribbean Food Ltd. Walkerswood Marketing Europe Ltd., Wenhaston, Suffolk, IP19 9EA, UK AND Bramfield Road Wenhaston Halesworth Suffolk IP19 9EA 01502 478147 <a href="http://www.walkerswood.com">www.walkerswood.com</a>
<b>Wanis</b>	<b>Wanis specializes in the importation and distribution of Afro-Caribbean foods and beverages from all parts of the Caribbean and Africa.</b>	Wanis Golden House Waterden Road London E15 2EE UNITED KINGDOM Tel: +44 (0)20 8986 0941 Fax: +44 (0)20 8985 6170 Email: <a href="mailto:enquiries@wanis.net">enquiries@wanis.net</a>
<b>WT Foods</b>	<b>WT Foods are one of the UK's leading Ethnic foods suppliers. They both manufacture and distribute ethnic foods from around the world</b>	1-2 Apex Point, Travelers lane, Welham Green, Herts AL9 7HF Tel: 01707 261770 Fax: 01707

	including the Caribbean. Their product lines now include Encona which distributed Dalgty products.	260193 email: <a href="mailto:wtfods.co.uk">wtfods.co.uk</a> <a href="http://www.wtfods.com">www.wtfods.com</a>
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## ANNEX E: UK Government Agencies Involved with Importing

Agency	Contact Information
<b>Association of Port Health Authorities(APHA)</b>	Dutton House 46 Church Street Runcorn, Cheshire WA7 1LL Tel: 011 44 1928 590440 Fax: 011 44 1928 581596
<b>Central Scientific Laboratories</b>	445 New Cross Road London SE14 6TA Tel: 011 44 20 8694 9330 Fax: 011 44 20 8691 9163 Contact: Mr. John Salter E-mail: <a href="mailto:johnsalter@eurofins.com">johnsalter@eurofins.com</a> Website: <a href="http://www.eurofins.com">www.eurofins.com</a>
<b>Companies House</b>	U. K. companies registration and information. Web: <a href="http://www.companies-house.gov.uk/">http://www.companies-house.gov.uk/</a> PO BOX 29019 21 Bloomsbury Street London WC1B 3XD Information & Telesales: 0870 3333636 Tel from outside of UK: 44 870 3333636 Fax +44 (0)29 20380900
<b>Copyright/Trademark Laws</b>	EU/UK copyright/trademark laws are implemented by The Patent Office, an Executive Agency of the Department of Trade and Industry. Exporters wanting to register trademarks/brand names are advised to contact: The Patent Office Concept House, Cardiff Road Newport, Gwent NP9 1RH Tel: 011 44 1633 814000 Fax 011 44 1633 814444 Website: <a href="http://www.patent.gov.uk">www.patent.gov.uk</a>
<b>Department of Trade and Industry:</b> <a href="http://www.dti.gov.uk/">http://www.dti.gov.uk/</a>	DTI works with the Trade Association Forum to help associations deliver best practice to members. Various benchmarking initiatives and studies have been carried out. The Forum disseminates the results through seminars, workshops and the publication of reports. The DTI encourages all trade associations to belong to the Forum and to continue to improve their own performance in an increasingly competitive environment.  Membership and further information is available from:  Stuart Bean Trade Association Forum Centre Point 103 New Oxford Street London WC1A 1DU Tel: 020 7395 8283 Fax:020 7836 5856 Website: <a href="http://www.taforum.org.uk">http://www.taforum.org.uk</a> Email: <a href="mailto:stuart.bean@taforum.org.uk">stuart.bean@taforum.org.uk</a>  Nick Morgan EID3d

	<p>Bay 455  Department of Trade and Industry  151 Buckingham Palace Road  London SW1W 9SS  Tel: 020 7215 1105  Fax: 020 7215 1070  Email: <a href="mailto:nick.morgan@dti.gsi.gov.uk">nick.morgan@dti.gsi.gov.uk</a></p> <p>Copies of the Best Practice Guide for the Model Trade Association are available on the TA Forum website</p>
<b>Department for Environment Food and Rural Affairs, International Trade Unit</b>	<p>Fourth Floor, 1A Page Street  London SW1P 4PQ  Tel: 011 44 20 7904 6405  Fax: 011 44 20 7904 6384</p> <p>For: Imports of other products of animal origin for human consumption, e.g. snails, honey, reptiles, must in some cases come only from specified production plants.</p>
<b>Europe for Business</b>	<p>41 Portland Avenue  Hove, East Sussex BN3 5NF  Tel: 011 44 1273 421485  Fax: 011 44 1273 383033  Contact: Ms. Lindsay Wittenberg  E-mail: <a href="mailto:lsw_europe@compuserve.com">lsw_europe@compuserve.com</a>  Website: <a href="http://www.europe-for-business.co.uk">www.europe-for-business.co.uk</a></p>
<b>Euro Fine Foods 2000</b>	<p>High Street  Uffington  Oxon SN7 7RP  Tel: 011 44 1367 820771  Fax: 011 44 1367 820871  Contact: Kenneth Mitchell  E-mail: <a href="mailto:kennethmitchell@compuserve.com">kennethmitchell@compuserve.com</a></p>
<b>Food Standards Agency</b>	<p>Room 306C  Ergon House  PO Box 31037  London SW1P 3WG  Telephone: +44 20 7238 6550  Fax: +44 (0) 20 7238 6330  Email: <a href="mailto:helpline@foodstandards.gsi.gov.uk">helpline@foodstandards.gsi.gov.uk</a>  Website: <a href="http://www.foodstandards.gov.uk">http://www.foodstandards.gov.uk</a></p> <p>Regulations: Food Standards Agency Daniel Diaz  Fuente 44-20-7276-8954</p> <p>Fresh Product perspective marketing standards for produce entering the EU – <a href="http://www.useu.be/agri">www.useu.be/agri</a> EU food import rules</p>
<b>Her Majesty's Customs and Excise (<a href="http://www.hmce.gov.uk/">http://www.hmce.gov.uk/</a>)</b>	<p>National Advice Service – 0845 010 9000*  PO Box 30  Wetherby  West Yorkshire  LS23 7YA  Tel: 01937 541010</p>
<b>Intervention Board</b>	<p>Lancaster House  Hampshire Court  Newcastle upon Tyne NE4 7YH  Tel: 011 44 191 226 5050  Fax: 011 44 191 226 5212  Lawgistics Ltd</p>

	Website: <a href="http://www.ib-uk.gov.uk">www.ib-uk.gov.uk</a>
<b>Lawgistics</b>	Ambury House 89 High Street Huntingdon PE29 3DP Tel: 011 44 20 1480 455500 Fax: 011 44 20 1480 455533 Contact: Mr. Dennis Chapman E-mail: <a href="mailto:info@lawgisticsonline.co.uk">info@lawgisticsonline.co.uk</a> Website: <a href="http://www.lawgisticsonline.co.uk">www.lawgisticsonline.co.uk</a>
<b>The Stationery Office</b>	PO Box 276 London SW8 5DT Tel orders: 011 44 20 7242 6393 Fax orders: 011 44 20 7242 6412 Website orders can be placed on: <a href="http://www.tso-online.co.uk">www.tso-online.co.uk</a> (For Copies of UK Regulations, Orders or Acts)
<b>The Stevens Partnership</b>	River Meade 17 Wheatfield Avenue Worcester WR5 3HA Tel: 01144 1905 353 417 Fax: 011 44 1905 353 557 Contact: Mr. Robert A. Stevens/Mrs Carol Stevens
<b>The United Kingdom Certification Authority For Organically Produced Foods</b>	UKROFS Import Section c/o DEFRA Area 5F Ergon House c/o Nobel House <a href="mailto:organic.imports@defra.gsi.gov.uk">organic.imports@defra.gsi.gov.uk</a> 17 Smith Square LONDON SW1P 3JR

## ANNEX F: UK Trade Associations

Agency	Contact Information
<b>British Frozen Food Federation</b>	<p>3rd Floor, Springfield House Springfield Road Grantham, Lincs, NG31 7BG Tel: 011 44 1476 515 300 Fax: 011 44 1476 515 309 E-mail: <a href="mailto:dg@bfff.co.uk">dg@bfff.co.uk</a> Website: <a href="http://www.bfff.co.uk">www.bfff.co.uk</a></p>
<b>British-Caribbean Chamber of Commerce</b>	<p>But the British-Caribbean Chamber of Commerce (<a href="http://www.britishcaribbean.com">http://www.britishcaribbean.com</a>) fails to have any mention of GO-Invest or any other Guyana organization while promoting Jamaica, Barbados, and Trinidad and Tobago's respective investment promotion agencies.</p> <p><a href="http://www.britishcaribbean.com">http://www.britishcaribbean.com</a> Dr Ian Kelly Chief Executive</p> <p>UK Office 34 – 38 Beverley Rd, Hull, HU3 1YE Tel: +44 (0)1482 324976 Fax: +44(0)1482 213962</p> <p>Caribbean Office Chamber Building, Columbus Circle, West Moorings, PO Box 499, Port of Spain, Trinidad Tel: +1 868 6376966 Fax: +1 868 6377425</p> <p>General Enquiries <a href="mailto:info@britishcaribbean.com">info@britishcaribbean.com</a> Press releases may be sent to <a href="mailto:press@britishcaribbean.com">press@britishcaribbean.com</a></p>
<b>The British Chambers of Commerce</b>	<p>Comprises a national network of quality-accredited Chambers of Commerce</p> <p>Manning House, 22 Carlisle Place, London SW1P 1JA Tel. 020 7565 2000 <a href="http://info@britishchambers.org.uk">info@britishchambers.org.uk</a></p>
<b>The British Council</b>	<p>10, Spring Gardens London SW1A 2BN</p> <p>Telephone +44 (0)20 7930 8466 Fax +44 (0)20 7839 6347 <a href="mailto:general.enquiries@britishcouncil.org">general.enquiries@britishcouncil.org</a></p>
<b>British Health Food</b>	<p>Manufacturer's Association 63 Hampton Court Way Thames Ditton Surrey KT7 0LT Tel: 011 44 20 8398 4066 Fax: 011 44 20 8398 5402</p>

	<p>E-mail: <a href="mailto:pviner@hfma.co.uk">pviner@hfma.co.uk</a>  (Director: Mrs. Penny Viner)  Website: <a href="http://www.hfma.co.uk">www.hfma.co.uk</a></p>
<b>British International Freight Association</b>	<p>Redfern House  Browells Lane  Feltham  Middlesex  TW13 7EP</p> <p><a href="http://www.bifa.org/">http://www.bifa.org/</a></p>
<b>Caribbean Trade Advisory Group</b>	<p>Promote British exports and investments to the Caribbean</p> <p><a href="http://www.caritag.com">http://www.caritag.com</a>  Tel: (020) 7799 1521  Fax: (020) 7340 1050</p> <p>Director: Sue Monteath  Address: Suite 18  Westminster Palace Gardens  1-7 Artillery Row  London SW1P 1RR  Europe</p> <p>E mail: <a href="mailto:sue.monteath@cb-bc.com">sue.monteath@cb-bc.com</a></p> <p>Nelson House  8/9 Northumberland Street  London  WC2N 5RA  Tel: 020 7839 0899  Fax: 020 7930 6664  E-mail: <a href="mailto:enquiries@caritag.com">enquiries@caritag.com</a></p>
<b>Confederation of British Industry</b>	<p>Centre Point, 103 New Oxford Street, London WC1A 1DU  Enquiries: 020 7395 8247   Fax: 020 7240 1578  <a href="http://www.cbi.org.uk/home.html">http://www.cbi.org.uk/home.html</a></p>

<b>The Federation of International Trade Associations (FITA)</b>	<p>The Federation of International Trade Associations 11800 Sunrise Valley Drive, Suite 210 Reston, VA 20191</p> <p><a href="http://www.fita.org/">http://www.fita.org/</a></p>
<b>Food and Drink Federation</b>	<p>6 Catherine Street London, WC2B 5JJ Tel: 011 44 20 7836 2460 Fax: 011 44 20 7836 0580 E-mail: <a href="mailto:marion.owen@fdf.org.uk">marion.owen@fdf.org.uk</a> Website: <a href="http://www.fdf.org.uk">www.fdf.org.uk</a></p>
<b>Fresh Produce Consortium</b>	<p>266-270 Flower Market New Covent Garden London, SW8 5NB Tel: 011 44 20 7627 3391 Fax: 011 44 20 7498 1191 E-mail: <a href="mailto:info@freshproduce.org.uk">info@freshproduce.org.uk</a> Website: <a href="http://www.freshproduce.org.uk">www.freshproduce.org.uk</a></p>
<b>Trade Partners UK</b>	<p>Trade Partners UK Kingsgate House 66-74 Victoria Street London SW1E 6SW Fax: 020 7215 8066</p>
<b>Trade Partners UK Caribbean Desk</b>	<p>Contact: Michael Johnson Tel: 020 7215 4717 Email: <a href="mailto:michael.johnson@tradingpartners.gov.uk">michael.johnson@tradingpartners.gov.uk</a></p> <p>Contact: Danny Goberdhan Tel: 020 7215 4763 Email: <a href="mailto:danny.goberdhan@tradingpartners.gov.uk">danny.goberdhan@tradingpartners.gov.uk</a></p>
<b>Trade Partners UK Caribbean and Central America Unit</b>	<p>Jane Alexander Deputy Manager Caribbean and Central America Unit Telephone: 020 7215 4763 E-mail: <a href="mailto:jane.alexander@tradingpartners.gov.uk">jane.alexander@tradingpartners.gov.uk</a></p> <p>Michael Johnson Caribbean and Central America Unit Telephone: 020 7215 4717 E-mail: <a href="mailto:michael.johnson@tradingpartners.gov.uk">michael.johnson@tradingpartners.gov.uk</a></p>
<b>Trade Partners UK overseas</b>	<p>Steve Crossman Deputy High Commissioner E-mail: <a href="mailto:Steve.Crossman@fco.gov.uk">Steve.Crossman@fco.gov.uk</a> British High Commission PO Box 10849 Georgetown Guyana E-mail: <a href="mailto:Steve.Crossman@fco.gov.uk">Steve.Crossman@fco.gov.uk</a></p> <p>Telephone: 00 592 2265 881 Fax: 00 592 2253 555</p>

## ANNEX G: UK Organic Certifying Authorities

Name	Address	Phone/Fax	Email
United Kingdom Register of Organic Food Standards (UKROFS) See <a href="#">Note 2</a>	c/o DEFRA Area 5F, Ergon House c/o Nobel House 17 Smith Square London SW1P 3JR	Tel: 020 7238 5605 Fax: 020 7238 6148	Email: <a href="mailto:peter.crofts@defra.gsi.gov.uk">peter.crofts@defra.gsi.gov.uk</a>
Organic Farmers and Growers Ltd	The Elim Centre Lancaster Road Shrewsbury Shropshire SY1 3LE	Tel: 01743 440512 Fax: 01743 461441	Email: <a href="mailto:info@organicfarmers.uk.com">info@organicfarmers.uk.com</a>
Scottish Organic Producers Association	Scottish Organic Centre 10th Avenue Royal Highland Centre Ingliston Edinburgh EH28 8NF	Tel: 0131 335 6606 Fax: 0131 335 6607	Email: <a href="mailto:sopa@sfgc.co.uk">sopa@sfgc.co.uk</a> Website: <a href="http://www.sopa.org.uk">www.sopa.org.uk</a>
Organic Food Federation	31 Turbine Way Eco Tech Business Park Swaffham Norfolk PE37 7XD	Tel: 01760 720444 Fax: 01760 720790	Email: <a href="mailto:organicfood@freenet.co.uk">organicfood@freenet.co.uk</a>
Soil Association Certification Ltd	Bristol House 40-56 Victoria Street Bristol BS1 6BY	Farmers and growers: Tel: 0117 914 2406 Processors: Tel: 0117 914 2407 Fax: 0117 925 2504	Email: Farmers and growers: <a href="mailto:prod.cert@soilassociation.org">prod.cert@soilassociation.org</a> Processors: <a href="mailto:proc.cert@soilassociation.org">proc.cert@soilassociation.org</a> Website: <a href="http://www.soilassociation.org">www.soilassociation.org</a>
Bio-Dynamic Agricultural Association	The Painswick Inn Project Gloucester Street Stroud GL5 1QG	Tel: 01453 759501 Fax: 01453 759501	Email: <a href="mailto:bdaa@biodynamic.freemove.co.uk">bdaa@biodynamic.freemove.co.uk</a>
Irish Organic Farmers and Growers Association	Harbour Building Harbour Road Kilbeggan Co Westmeath Republic of Ireland	Tel: 00 353 506 32563 Fax: 00 353 506 32063	Email: <a href="mailto:iofga@eircom.net">iofga@eircom.net</a>
Food Certification (Scotland) Ltd Organic certification of farmed salmon in the UK	Redwood 19 Culduthel Road Inverness IV2 4AA	Tel: 01463 222251 Fax: 01463 711408	
Organic Trust Limited	Vernon House 2 Vernon Avenue	Tel: 00 353 185 30271	Email: <a href="mailto:organic@iol.ie">organic@iol.ie</a>

	<b>Clontarf Dublin 3 Republic of Ireland</b>	<b>Fax: 00 353 185 30271</b>	
<b>CMi Certification</b>	<b>Long Hanborough Oxford OX29 8LH</b>	<b>Tel: 0131 317 2500 Fax: 0131 317 1872</b>	<b>Email: <a href="mailto:tim.green@cmi-plc.com">tim.green@cmi-plc.com</a></b>
<b>International Certification Service (GB) Ltd trading as Farm Verified Organic</b>	<b>Meadow Vale Offices, Betws Road, Llanrwst, Conwy LL26 OPP</b>	<b>Tel: 01492 642628 Fax: 01492 642091</b>	<b>Email: <a href="mailto:ICSGB@aol.com">ICSGB@aol.com</a></b>

**Notes:**

1. The identifying code of the certifier must be used in the labeling of certified organic products; for example "Organic Certification: UK 1". This does not prevent the use of the name, initials or logo of the certifier being used in addition.
2. UKROFS is the Control Authority for Organic Standards in the UK and also runs a scheme for the direct registration of operators.
3. A number has not been allocated to Food Certification (Scotland) Ltd because although there are recognized private standards (as allowed by EC Regulations) fish products are not yet covered by EC rules.

## ANNEX H: Further Resources

### Guyana Embassy in UK

High Commission for the Co-operative Republic of Guyana  
3 Palace Court  
Bayswater Rd  
London  
W2 4LP  
Telephone: 020 7229 7684  
Fax: 020 7727 9809

### Internet Resources:

- **Foreign and Commonwealth Office** (London) to promote the national interests of the United Kingdom and to contribute to a strong world community – [www.fco.gov.uk](http://www.fco.gov.uk)
- **International Trade Portal** provide overseas market information; access to trade finance advice; downloadable international trade education and training material; online travel advice services; assistance with technical and documentation problems and the UK's most comprehensive database of international trade information and tested global links - <http://www.international-trade.org.uk/>
- **Trade Missions** finding out how to do business abroad - <http://www.trademissions.co.uk/>
- **ComFind Internet Business Directory**  
Claims to be the largest global business directory on the internet.  
Web: <http://www.comfind.com/>
- **Europages: The European Business Directory**  
Web: <http://www.europages.com/>
- **Free Pint UK Company Research Gateway**  
Free basic company information of over 1.6 million U. K. companies. Detailed reports are available to purchase.  
Web: <http://www.freepint.co.uk/icc/>
- **FITA: International Trade Web Resources**  
Web: <http://www.fita.org/webindex/>
- **TradePort International Trade**  
Information about the basics of exporting, and international trade research.  
(<http://www.tradeport.org/>)

### Export and Import Agents

- A E V International Supply (ME) Ltd *7 London Road, Feltham, Middlesex TW148RW Tel: 01784245917 Fax: 017849680*
- AJC International *P.O. Box 6602 2 Pollard Rd. London N20 Tel: 020-8361-8026*  
International frozen food distributor

- AJL Export Services Ltd *Park House Greenhill Crescent Watford, Hertfordshire WD1 8QU Phone: 01923 239371 books & magazines*
- Abingdon Cockell Ltd *1B Chelsea Manor St Chelsea SW3 5RP Tel: 020 7352 2900*
- Acorn Exports Ltd *71 Audley Rd Hendon NW4 3EU Tel: 020 8202 6028*
- Alan Skelton Associates Ltd *320 Garratt Lane Wandsworth SW18 4EJ Tel: 020 7371 3388*
- G S I Cargo Systems (UK) Ltd *6, Felthambrook Way, Feltham, Middlesex TW137DU Tel: 01818937300 Fax: 0208548693*
- Leisuretime Products Ltd *Unit 9, Bolney Way, Feltham, Middlesex TW136DB Tel: 02088986005 Fax: 0208597397*
- Plane Handling Ltd *Unit 8, Faggs Road, Feltham, Middlesex TW140NG Tel: 02088442228 Fax: 020851956*
- Trident Sourcing (overseas) Ltd *Feltham, Middlesex TW140XU Tel: 02087514547 Fax: 01751794205*
- Unimatco *Bulstrode Oxford Road Gerrards Cross Bucks SL9 8SZ (UK) Fax:+44-(0)1753-889378 Specialize in shipping for missionaries and overseas aid workers.*
- Wallace Cartwright & Co. Ltd., *55/56 St. James Street London S.W. 1A 1LQ Tel: 020 7629 2476 liaison, buying and shipping business*

## ANNEX I: UK Labeling Guidelines<sup>48</sup>

LANGUAGE	British English must be used on all labeling. Multi-language labeling is permitted throughout the EU.
NAME OF THE FOOD	This may be the name prescribed by law or a name customary in the area where the food is sold or a precise name to be distinguished from products with which it could be confused. The name may be a name and/or description. Trade names, brand names or fancy names are permitted but may not be substituted for the name of the food. The product name, the statement of quantity (weight, volume), and the indication of minimum durability (or a reference to it) must all appear in the same field of vision.
FLAVORS	<p>The name of a food may only be used in a product description to indicate a specific flavor, e.g. "strawberry sauce" if the flavoring is wholly or mainly derived from that food. Otherwise the word "flavor" must follow the name of the food, e.g. "strawberry flavor sauce".</p> <ul style="list-style-type: none"> <li>• For chocolate flavor products the chocolate flavor may be derived from non-fat cocoa solids.</li> <li>• An illustration representing the flavor of a food may only appear if the flavor is derived wholly or mainly from the food depicted.</li> </ul>
LIST OF INGREDIENTS	<p>This should be headed by the word "Ingredients" or for foods to be reconstituted "Ingredients of the reconstituted product" or "Ingredients of the ready to use product" etc., or for foods consisting entirely of mixed fruit, "Ingredients in variable proportion".</p> <ul style="list-style-type: none"> <li>• The ingredients should be listed in descending order of weight, as used at the time of preparation of the food, except water and volatile products should be listed in order of weight in the finished product. Ingredients used in concentrated or dehydrated form and which reconstitute during preparation of the food may be listed as if reconstituted.</li> <li>• Constituents of compound ingredients may be listed with the name of the compound ingredient so that the association is clear. Constituents need to be listed if the compound ingredient may be listed by a generic term or if it constitutes more than 25% of the finished product, except the additives present in the compound ingredient must be listed if they have technological function in the finished product.</li> <li>• Water must be listed in the correct position unless it is used solely for reconstitution or rehydration of an ingredient or it forms part of a medium not normally consumed, or added water does not exceed 5% of the finished product.</li> <li>• Certain ingredients may be designated by the name of their category group rather than the specific name. These include fats, oils, starch, fish, cheese, spices, herbs, gum bases, crumbs, sugar, dextrose, glucose syrup, milk proteins, cocoa butter, crystallized fruit, vegetables and wine.</li> </ul>

<sup>48</sup> The majority of the information in this table was provided by the United States Department of Agriculture's Foreign Agriculture Service Senior Agriculture Assistant, Phil Bicknell in London, 24 Grosvenor Square, Box 48, London, W1A 1AE, United Kingdom, Tel: +44 (0) 20 7894 0464, Fax: +44 (0) 20 7894 0031, Email: [AgLondon@fas.usda.gov](mailto:AgLondon@fas.usda.gov) and through the website: <http://www.usembassy.org.uk/fas/>

QUANTITATIVE INGREDIENTS DECLARATION (QUID)	<p>UK legislation is now in place which enforces the EU Directive on QUID. This means that if special emphasis is placed on the presence of an ingredient, the minimum or maximum amount as a % must be declared either next to the name of the food or near the name of the ingredient in the ingredients list. QUID does not apply to constituents naturally present in foods and which have not been added as ingredients e.g. caffeine (in coffee) and vitamins (in fruit juices). Other exemptions include:</p> <ul style="list-style-type: none"> <li>• when products state the drained net weight;</li> <li>• where an ingredient is used for the purposes of flavoring;</li> <li>• when the wording "with sweeteners" or "with sugar(s) and sweetener(s)" accompanies the name under which a foodstuff is sold;</li> <li>• when the addition of vitamins and minerals is subject to nutrition labeling and when foodstuffs are concentrated or dehydrated.</li> </ul>
WEIGHTS & MEASURES	Net quantities of prepackaged foodstuffs must be given in metric units, followed by the imperial equivalent if so desired, i.e. the metric must come first.
SHELF LIFE DATE MARKS	<p>A statement of minimum durability is required. This must be stated by the words "best before....." followed by storage life as day, month, year and any special storage conditions should be indicated. Or it may be expressed, for foods with shelf life 3 months or less as "best before....." followed by day, month only; or for foods with shelf life 3 months or more as "best before end....." followed by month, year only.</p> <p>For foods to be consumed within 6 weeks the minimum durability can alternatively be stated by the words "sell by....." followed by day, month plus an indication of storage period from date of purchase plus any special storage conditions. The words "best before...." or "best before end....." or "sell by...." must be in the same field of vision as product name but the actual date may appear on a different part of the label provided this is indicated after the words "best before....." or "best before end....." or "sell by.....".</p> <p>In the case of highly perishable foodstuffs the date consisting of the day, the month and possible the year has to be preceded by the words "use by". Minimum durability need not be stated on foods lasting more than 18 months or for deep-frozen (including quick-frozen) food, also certain specific foods are exempt.</p> <p>The Food Standards Agency has published Guidance Notes on which foods should carry a "use by" date, available at <a href="http://www.foodstandards.gov.uk">www.foodstandards.gov.uk</a></p>
STORAGE CONDITIONS	Any special storage conditions or conditions of use should be stated. Instructions for use should be given if necessary.
CONTACT DETAILS	Name and address of manufacturer or packer, or of a seller in the UK/EU must be stated.
PLACE OF ORIGIN	Imported goods must be clearly marked with a distinct indication of the country of origin. The Food Standards Agency has published Guidance Notes on Place or Origin, available at <a href="http://www.foodstandards.gov.uk">www.foodstandards.gov.uk</a>
ARTISTIC LICENSE	Any illustrations used must not be misleading, e.g. showing a cow, when there is no dairy content. The use of wording "serving suggestion" is not illegal but should not be used if this misleads as to the nature of the product.
FOODSTUFFS FOR PARTICULAR NUTRITIONAL PURPOSES (PARNUT)	These are foods which are claimed suitable for particular nutritional uses for people whose digestion or metabolism is disturbed, or who because of their special physiological condition would benefit from controlled consumption of certain substances. This includes the descriptions "dietary" or "dietetic". All PARNUT foods must give nutritional information and be labeled with compositional aspects of manufacturing process which give the food its characteristics. If the food is specially prepared for that class of persons, the name of the food must be accompanied by an indication of the foods' particular characteristics.
NUTRITIONAL LABELING	Nutritional labeling is compulsory where a nutritional claim appears on the label, in presentation or in advertising, with the exclusion of generic advertising. The only nutrition claims permitted are those relating to energy

	<p>values and, to the following nutrients: protein, carbohydrate, fat, fiber, sodium and prescribed vitamins, and to substances which belong to or which are of the aforementioned nutrients. Unless products fit under this caveat or the UK importer, retailer or other end user has requested the inclusion of nutritional labeling it is advisable to omit any reference to nutritional labeling on your product.</p> <p>UK requires nutrients to be shown per 100g or 100ml. The nutrient amounts may, in addition, be given per quantified serving or portion (if number of portions in pack is stated). Health claims such as sodium and hypertension; fruits and vegetables and cancer; calcium and osteoporosis are not permitted.</p> <p>The UK's Food Standards Agency has issued Guidance Notes on Nutritional Labeling and Guidelines For The Use Of Certain Nutrition Claims in Food Labelling and Advertising available at <a href="http://www.foodstandards.gov.uk">www.foodstandards.gov.uk</a></p>
SWEETENERS	<p>For a food containing:</p> <ul style="list-style-type: none"> <li>• a permitted sweetener, the name should be accompanied by "with sweetener";</li> <li>• both added sugar(s) and sweetener(s), the name should be accompanied by "with sugar(s) and sweetener(s);</li> <li>• aspartame, the food should be marked "contains a source of phenylalanine";</li> <li>• more than 10% added polyols, the food should be marked: "excessive consumption may produce laxative effects".</li> </ul>
ALCOHOLIC BEVERAGES	<p>For any beverage containing more than 1.2% by volume of alcohol, the actual strength by volume must appear on the product label.</p>
Bread	<p>Bread may only contain lecithins, mono- and di-glycerides of fatty acids, lactic acid esters of mono- and di-glycerides of fatty acids, citric acid esters of mono- and di-glycerides of fatty acids, stearyl tartrate, all GMP; sodium stearoyl-2-lactylate, calcium stearoyl-2-lactylate maximum 5,000 mg/g. Where a slimming claim is made the bread may contain alpha-cellulose and sodium carboxymethylcellulose, GMP.</p>
Cheese	<p>Only soft cheese, whey cheese, processed cheese, cheese spread may contain alginic acid, sodium alginate, calcium alginate, carrageenan, locust bean gum, tragacanth, acacia, guar gum, xanthan gum, all GMP. Processed cheese and cheese spread may contain sodium carboxymethylcellulose.</p>
Organic foods	<p>All organic foodstuffs must conform to EU/UK organic food regulations in addition to the food labeling legislation described above. Organic food legislation is administered by UKROFS (United Kingdom Register of Organic Food Standards) at the Ministry of Agriculture, Fisheries and Food.</p>
Chocolate	<p>Chocolate products covered by the chocolate regulations may contain lecithins and/or ammonium phosphatides max 0.5 mg/kg phosphatides. (1.0 mg/kg phosphatides for chocolate/milk chocolate vermicelli and flakes and milk chocolate with 20" minimum milk solids), polyglycerol esters of polycondensed fatty acids of castor oil, maximum 0.5 mg/kg, sorbitan tristearate maximum 1.0 mg/kg, any combination of these emulsifiers and stabilizers (within prescribed limits), maximum 1.5 mg/kg.</p>
Meat products -	<p>Compositional standards exist for some meat products; this is stated, where relevant, in the "additional comments" column. The meat content must be declared, generally in the form "minimum x % meat" near the list of ingredients. For some whole meat products any added water must be declared (this will be indicated where relevant). The lean meat content must be minimum 65% of the declared meat content, except for meat pies, sausage meat and meat pate, when it must be minimum 50% of the declared meat content.</p>
PACKAGING GASES	<p>Foods packaged in certain gases: If the durability of a food has been extended by being packaged in a permitted packaging gas, it should be marked "packaged in a protective atmosphere."</p>
PRODUCTS FOR FURTHER PROCESSING	<p>Unlabeled ("bright stack") containers of food to be processed, labeled, or re-packed in the UK are not subject to labeling legislation</p>
BULK PACKED OR	<p>Institutional size products for the HRI sector or bulk packed retail products</p>

<b>INSTITUTIONAL SIZE PRODUCTS</b>	must conform to the standard labeling regulations. As regards lot marking (see below), the lot mark of a sales unit contained in bulk packaging, for example retail packs enclosed in a wholesale pack, should appear on the outer container in addition to those retail packs.
<b>LOT MARKING</b>	All packaged foodstuffs must bear a lot marking. In accordance with EU/UK legislation, the size of the lot shall be determined in each case by the producer, manufacturer or packing company of the foodstuff in question, or of the first seller established within the European Community. The marking shall be preceded by the letter "L" except in cases where it is clearly distinguishable from other indications on the label. A date mark as set out in the UK's Food Labelling Regulations 1996 i.e. the figures associated with a "best before", "best before end" or "use by" which appears on a product may be used as a lot mark.
<b>STICK-ON LABELS</b>	Stick-on labels meeting UK labeling requirements may be used on a temporary basis. They can be applied prior to export or applied in the UK before retail sale.
<b>BAR CODES</b>	The UK has an Electronic Article Number (EAN) system with 13 digits. The EAN system was designed around the U.S. UPC system. Outer cases must carry traded unit codes (enlarged bar codes) for electronic monitoring of stock movement. The EAN system allows for three different bar code symbols: EAN-13, ITF-14 and EAN-128 to be used on outer cases (traded units). Many UK retailers prefer ITF-14. (note: 12 digits, U.S. UPC bar codes will work perfectly in the UK.)
<b>WEIGHT INDICATIONS</b>	Must be clear, legible, conspicuous, prominent and not hidden or obscured. Weight declaration is not required on goods weighing less than 5g or 5ml.  One type space must be left between the numerical value of the quantity and the unit or abbreviation of the unit of measurement.
<b>ABBREVIATIONS</b>	Abbreviations should be written in lower case i.e. lb, oz; but litre is allowed to be L or l. No abbreviation of "net" or "gross" is allowed.
<b>IMPERIAL</b>	Where volume is indicated in imperial units as well as metric, the imperial must be in British Imperial fluid ounces, pints, quarts etc.  The largest whole imperial units must be used e.g. 1lb 2oz must not be declared as 18oz. Markings up to 40 fluid ounces may be declared as fluid ounces, but above 40 fl oz the pint, quart or gallon must be used..
<b>METRIC</b>	Metric markings of one kilogramme, litre or 0.01 cubic meters or more must be expressed in terms of kilograms, liters or cubic meters and fractions of these units. Quantities less than these must be expressed in terms of grammes, centilitres and fraction of centilitre or millilitres, or fractions of a cubic centimetre respectively.  Where decimal fractions are used the decimal marker must be a point or comma on the line.

Abbreviations: The following abbreviations of units of weight are allowed:

Imperial		Metric	
<b>Pound</b>	<b>Lb</b>	<b>kilogramme or kilogram</b>	<b>kg</b>
<b>Ounce</b>	<b>Oz</b>	<b>hectogramme or hectogram</b>	<b>hg</b>
<b>Gallon</b>	<b>Gal</b>	<b>gramme or gram</b>	<b>g</b>
<b>Quart</b>	<b>Qt</b>	<b>tonne</b>	<b>t</b>
<b>Pint</b>	<b>Pt</b>	<b>cubic meter</b>	<b>m<sup>3</sup></b>
<b>fluid oz</b>	<b>fl oz</b>	<b>cubic centimetre</b>	<b>cm<sup>3</sup></b>
		<b>litre</b>	<b>l</b>
		<b>decilitre</b>	<b>dl</b>
		<b>millilitre</b>	<b>ml</b>
		<b>centilitre</b>	<b>Cl</b>

Note: No 's' may be added to metric abbreviations

The minimum height of numbers used to express the numerical value of the weight or volume is as follows (regular fractions must be written with the numerator on top of the denominator and are treated as a single figure for this purpose).

Weight of contents	Capacity of contents	Volume of contents	Minimum size of numbers to be used in marking
<b>Not exceeding 50 g</b>	<b>Not exceeding 5 CL</b>	<b>Not exceeding 5 CL</b>	<b>2 mm</b>
<b>Exceeding 50 g, not exceeding 200 g</b>	<b>Exceeding 5 CL, not exceeding 20 CL</b>	<b>Exceeding 5 CL, not exceeding 200 CL</b>	<b>3 mm</b>
<b>Exceeding 200 g, not exceeding 1 kg</b>	<b>Exceeding 20 CL, not exceeding 1 litre</b>	<b>Exceeding 200 CL, not exceeding 1000 CL</b>	<b>4 mm</b>
<b>Exceeding 1 kg</b>	<b>Exceeding 1 litre</b>	<b>Exceeding 1000 CL</b>	<b>6 mm</b>

Any other characters used in the marking must be at least half the height given in the above table, of uniform size and color and in lower case letters.

#### Summary of the requirements for the Essential Requirements regulations

Essential Requirements:	<ul style="list-style-type: none"> <li>• <b>Packaging must be minimal subject to safety, hygiene and acceptance for the packed product and for the consumer;</b></li> <li>• <b>Noxious or hazardous substances in packaging must be minimized in emissions, ash or leachate from incineration or landfill;</b></li> </ul>
Packaging must be recoverable through at least one of the following:	<ul style="list-style-type: none"> <li>• <b>material recycling</b></li> <li>• <b>incineration with energy recovery</b></li> <li>• <b>composting</b></li> <li>• <b>biodegradation</b></li> </ul>
<b>Heavy Metal Limits :</b>	<ul style="list-style-type: none"> <li>• <b>Aggregate heavy metal limits apply to cadmium, mercury, lead and hexavalent chromium. The total by weight should not exceed: 100 ppm</b></li> </ul>

## ANNEX J: Applicable UK Statutes

YEAR & STATUTORY INSTRUMENT (SI) NO.	TITLE
1992 No. 1978	<p><b>The Food Additives Labelling Regulations 1992 (amended by those regulations listed below)</b></p> <p>These list which food additives are authorized for use in foodstuffs intended for human consumption. These regulations define food additives and lay down labeling requirements at retail and wholesale level for additives sold as such.</p>
1992 No. 1971	<p><b>The Flavourings in Food Regulations 1992</b></p> <p>These regulations define categories of flavorings to be controlled and lay down limits for certain undesirable substances which are present in some flavorings and should be restricted.</p>
1995 No. 3123	<p><b>The Sweeteners in Food Regulations 1995</b></p> <p>These regulations define "sweetener"; list the permitted sweeteners and; by cross-reference, the purity criteria with which they must comply; set down conditions of use for sweeteners in food; control the sale of sweeteners direct to the public (table top sweeteners) and specify additional labeling requirements for these products.</p>
1995 No. 3124	<p><b>The Colours in Food Regulations 1995</b></p> <p>These regulations lay down specific criteria of purity concerning colors for use in foodstuffs. They define "colour" and list the permitted colors and, by cross-reference, the purity criteria with which they must comply; set down conditions of use for colors in food and control the sale of colors direct to the public.</p>
1995 No. 3187	<p><b>The Miscellaneous Food Additives Regulations 1995 (and its subsequent amendments in 1997 and 1999)</b></p> <p>These cover food additives other than colors and sweeteners, such as preservatives and emulsifiers. The regulations define each class of miscellaneous food additives and list those that are permitted; they also specify purity criteria and control their sale direct to the public.</p>

These regulations listed above are the main pieces of legislation, and they have been subsequently amended. For a complete listing of UK food law read the Food Standard Agency's 'Food Law Guide' document available at <http://www.foodstandards.gov.uk/regulations/foodlaw.htm>

In addition to the specific regulations listed above, there are also general requirements for additives used as ingredients in foods set down in the Food Labelling Regulations 1996:

Additives used as ingredients in pre-packed foods to perform certain functions must be declared in the labeling by the appropriate category name of the function. This must be followed by their specific name or serial number. The categories are:

Acid	Flour treatment agent
<b>Acidity regulator</b>	<b>Gelling agent</b>

Anti-caking agent	Glazing agent
Anti-foaming agent	Humectant
Antioxidant	Modified starch
Bulking agent	Preservative
Colour	Propellant gas
Emulsifier	Raising agent
Emulsifying Salts	Sweetener
Firming agent	Stabilizer
Flavor enhancer	Thickener

Other points of note from the Food Labelling Regulations 1996 with regard to additives:

FLAVORINGS	<b>Flavorings may be declared by either that name alone or by a more specific name.</b>
ACIDS	<b>If the specific name includes the word "acid", the category name may be omitted.</b>
MODIFIED STARCHES	<b>For these, neither the specific name nor the serial number need be indicated.</b>
FUNCTIONS	<b>If an additive serves more than one function in a food the category name which represents its principal function must be used to describe it. Where no category name is available for the function performed by an additive in a food, the additive must be declared in the ingredients list by its specific name. A serial number cannot be used on its own.</b>

## ANNEX K: UK Organic Statistics

### Number of participants in organic sector - 31 December 2000

Farmers and growers	Processors and/or importers	Total
<b>3563</b>	<b>1945</b>	<b>5508</b>

### Land in organic production (in hectares) - 31 December 2000

Country	Year 1 in conversion	Year 2 in conversion	Organic	Total
<b>England</b>	<b>58397.77</b>	<b>53825.33</b>	<b>50936.15</b>	<b>163159.25</b>
<b>Scotland</b>	<b>81375.31</b>	<b>106655.87</b>	<b>133721.08</b>	<b>321752.26</b>
<b>Wales</b>	<b>6858.28</b>	<b>24360.83</b>	<b>8844.10</b>	<b>40063.21</b>
<b>Northern Ireland</b>	<b>577.62</b>	<b>1100.72</b>	<b>669.79</b>	<b>2348.13</b>
<b>Total</b>	<b>147208.98</b>	<b>185942.75</b>	<b>194171.12</b>	<b>527322.85</b>

### Organic Production in the UK 1993 - 2000

	APR 93	FEB 94	APR 95	APR 96	APR 97	APR 98	APR 99	JAN 00	DEC 00
<b>Total Ha</b>	<b>30,424</b>	<b>30,745</b>	<b>45,185</b>	<b>48,185</b>	<b>50,798</b>	<b>81,900</b>	<b>275,966</b>	<b>425,945</b>	<b>527,323</b>
<b>Number of Holdings</b>	<b>849</b>	<b>N/A</b>	<b>757</b>	<b>848</b>	<b>880</b>	<b>1,467</b>	<b>1,527</b>	<b>2538</b>	<b>3563</b>

source: DEFRA UK

## ANNEX L: Calendar of Upcoming UK / Caribbean Trade Events

<b>Feb 2001</b>	British Trade mission to Trinidad & Tobago, Barbados and Guyana. Contact Nicky Lay Flurrie at Chamber Business on 01582 522384.	
NASFT Summer Fancy Food Show - UK Buying Mission New York, USA Contact: Jennifer Jones, Agricultural Marketing Specialist, FAS London Tel: +44 20 7894 0040 Fax: +44 20 7894 0031 E-mail: <a href="mailto:JonesJE@fas.usda.gov">JonesJE@fas.usda.gov</a>	July 7-9	<b>FAS London is planning to lead a buying delegation to the NASFT Summer Fancy Food Show this July. For details of the buyers on the mission and their product interests contact Jennifer Jones.</b>
Organex Earls Court, London Contact: Mike Murray, Tarsus Organex Ltd Tel: +44 1494 511525 Fax: +44 1494 511526 E-mail: <a href="mailto:mike@organex.net">mike@organex.net</a> Website: <a href="http://www.organex.net">www.organex.net</a>	Oct 15-16	<b>Organex is the UK's only trade show dedicated solely to organic food and drink products. Now in its fifth year, growth has been significant. Visitor numbers last year approached 4,000, and included buyers from all the major supermarket chains. The show includes a featured area for organic ingredients and a vegetarian showcase, highlighting the growing market of meat-free food. The organizers specifically aim to attract predominantly major multiple retail buyers as well as buyers from smaller retail chains and independent stores.</b>
<b>IFE 2003 - *USDA ENDORSED SHOW*</b> <b>International Food &amp; Drink Exhibition</b> ExCeL Docklands, London Contact: Victoria Littlewood, Fresh RM Tel: +44 20 7886 3000 Fax: +44 20 7886 3001 E-mail: <a href="mailto:victoria.littlewood@freshrm.co.uk">victoria.littlewood@freshrm.co.uk</a> Website: <a href="http://www.ife.co.uk">www.ife.co.uk</a>	Mar 23-26	<b>IFE is the UK's leading food and drink trade exhibition. A biennial event, IFE attracts around 38,000 visitors, with at least 10% attendance from overseas buyers. The U.S. Pavilion is an established attraction at the show and we aim to work with the organizer's Fresh RM to have around 30 U.S. companies participating. This is a USDA endorsed show on account of its reputation for attracting UK buyers from key sectors of interest to U.S. companies - importers, retailers and foodservice buyers. It is particularly useful for new-to-market companies with shelf-stable or frozen grocery products. Participation in the U.S. Pavilion provides added benefits to the U.S. company with the provision of business lounge, and FAS/USDA staff on hand to ensure contacts are made and arrangements smooth. USDA London also holds a reception for U.S. Pavilion participants to facilitate contact with the UK trade. Please be aware of a recent change in MAP funding regulations which state that MAP recipients must be located within the American Pavilion.</b>

<p>The Authentic Food Market          NEC, Birmingham          Contact: Fresh RM Tel: +44 (0) 20 7886 3100 Fax: +44 (0) 20 7886 3091          E-Mail: <a href="mailto:enquiry@freshrm.co.uk">enquiry@freshrm.co.uk</a> Website: <a href="http://www.authenticfoodmarket.co.uk">www.authenticfoodmarket.co.uk</a></p> <p>Serving a booming, exciting and vibrant marketplace, The Authentic Food Market comprises three co-located events. The Asian Food Show, The Oriental Food Show and New Ethnic Foods will truly represent each sector of the market, to make it easier for visitors to find products of specific interest to them and to provide a direct and focused route to meet these buyers. It supercedes the Ethnic Food Show and reflects the dramatic change in the ethnic industry as it becomes far more mainstream and diverse.</p>	<p>June 9-11, 2002</p>
<p>Specialty &amp; Fine Food Fair          Royal Armouries, Leeds          Contact: Fresh RM, Tel: 020 7886 3100 Fax: 020 7886 3091</p>	<p>Sep 1-2, 2002</p>
<p>Specialty &amp; Fine Food Fair          Olympia, London          Contact: Fresh RM, Tel: 020 7886 3100 Fax: 020 7886 3091</p>	<p>Sep 8-10, 2002</p>
<p>Pub &amp; Bar Trade Show          Olympia, London          Contact: Quantum Business Media, Tel: 020 8565 4200 Fax: 020 8565 4202</p>	<p>Sep 16-18, 2002</p>
<p>Organex          Earls Court, London          Contact: Tarsus Organex Ltd., Tel: 01494 511 525 Fax: 01494 511 526</p> <p>The show features every kind of organic produce imaginable, displayed by everyone from the biggest names in the industry to small independent producers showcasing unique lines. It is attended by buyers from major supermarket chains, hotels, restaurants, multiples, health food shops and independent retailers, as well as brand owners and manufacturers.</p>	<p>Oct 15-16, 2002</p>
<p>British trade mission to Jamaica/Trinidad &amp; Tobago/Barbados.          Contact Tim Lannon at the Black Country Chamber and Business Link on 01384 360534</p>	<p>13-25 Nov 2002</p>
<p>BBC Good Food Show          NEC, Birmingham Contact:          Consumer Exhibitions Ltd, Tel: 020 8948 1666 Fax: 020 8332 9376 2003</p>	<p>Nov 27-Dec 1, 2002</p>
<p>Wine Scotland          SECC, Glasgow          Contact: Site Ltd, Tel: +44 (0) 131 556 5152 Fax: +44 (0) 131 556 8896 E-Mail: <a href="mailto:exhibit@site.org.uk">exhibit@site.org.uk</a></p>	<p>Mar 17-18, 2003</p>
<p>SCOTHOT          SECC, Glasgow          Contact: Site Ltd, Tel: +44 (0) 131 556 5152 Fax: +44 (0) 131 556 8896 E-Mail: <a href="mailto:exhibit@site.org.uk">exhibit@site.org.uk</a></p>	<p>Mar 17-20, 2003</p>
<p>IFE 2003 - International Food &amp; Drink Exhibition          Excel Docklands, London          Contact: Fresh RM Tel: +44 (0) 20 7886 3100 Fax: +44 (0) 20 7886 3091</p>	<p>Mar 23-26, 2003</p>

<p>E-Mail: <a href="mailto:enquiry@freshrm.co.uk">enquiry@freshrm.co.uk</a> Web site: <a href="http://www.ife.co.uk">www.ife.co.uk</a></p> <p>IFE is the premier food and drink exhibition in the UK. Delivering more trade visitors than any other food event, IFE provides you with a unique opportunity to meet, interact and conduct business with buyers from the retail, catering and wholesale markets.</p>	
<p>International Food, Drink &amp; Catering Exhibition Kings Hall, Belfast, N. Ireland Contact: Industrial &amp; Trade Exhibitions Ltd. Tel: 028 9023 0425 Fax: 028 9024 3595</p>	<p>Apr 1-3, 2003</p>

## **ANNEX M: 'The benefits of organic farming'**

*Speech by HRH The Prince of Wales at the Caribbean Organics and Fairtrade Conference, Lancaster House, 21 March 2002*

Ministers, Ladies and Gentlemen. First of all, may I say how delighted I am that the Foreign and Commonwealth Office and Fairtrade have taken the initiative to hold this conference on organic agriculture in the Caribbean. I am sorry not to have been able to have been with you all day, particularly as your morning's session appears to have been a lively and fascinating one.

Some people - incredibly, in my view - still think that organic agriculture is a marginal, niche issue, not worthy of the attention of serious agricultural producers and unlikely to command anything other than minority demand from the consumer. I firmly believe, ladies and gentlemen, that such people are quite wrong, and that is why this conference is so important and so timely.

### **GOING ORGANIC**

First of all, it is clear that the organic sector is growing at a significant rate and is offering an alternative route for agricultural development in many parts of the world which rely on the export of agricultural commodities for their livelihood. Organic food now represents over three per cent of European food consumption, from virtually nothing ten years ago, and that consumption is growing at over 15 per cent each year. This rate of growth is expected to continue - and even increase - over the next ten years, despite the fact that organic produce in the European market place continues to command a considerable premium over the products of so-called conventional agriculture.

Secondly, you will have heard this morning something about the problems of the Caribbean banana industry, and the prospects for diversification and re-development through organic agriculture and fair trade in the Windward Islands. I firmly believe that the organic system is the most effective way of applying the principles of sustainable agricultural development and food production to the economy. Not only is there growing demand in the present, but the organic approach, coupled with the application of fair trade principles, will help ensure steady and sustainable development of, especially, smaller economies in the future.

More specifically - and as some of you may know - this conference arises from events set in train by my visit to Guyana just over two years ago - something I want to touch upon in a moment. For the first time, this gathering is bringing together all those with a stake in the production, certification and marketing of organically-grown and fairly traded agricultural products in the region. I am proud to say that I am Patron of the Soil Association who were the certifiers of the very first organic and fair trade project in the Caribbean that began in 1993, when the Maya cocoa growers of southern Belize began to supply organic cocoa to Green and Black's chocolate for their product Maya Gold. The growers co-operative has now been Soil Association certified for nearly a decade and their project has shown tremendous resilience and brought real economic benefits, overcoming even the setback of the considerable damage caused by last year's hurricane.

Craig Sams of Green and Black's chocolate is also the Chairman of the Soil Association and is here today, so I am sure he will welcome any enquiries about this small, but seminal, project. It is, I think, becoming increasingly apparent that economic stability and sustainability are far more important than crude measures of quantity produced and that growing organically is a better way forward for development than dependence on purchased inputs, with all the debt and environmental side-effects that they bring in their wake. If bad weather reduces an organic producer's yields he or she may suffer some economic hardship, but for the producer who has borrowed to purchase chemical inputs a bad year can lead to bankruptcy and the loss of land that provides their livelihood.

Too many development projects in the past have focused solely on setting up production systems without ensuring that reliable long term marketing systems are also in place. I believe that fair trade, combined with organic production can help to reduce the kind of trading that exploits producers distant from the final market and ignorant of prevailing prices.

One benefit of the fact that supply is still limited is that organic produce is unlikely to become subject to the commodity-style trading of conventional agricultural export crops. Most products go to specific markets through organic traders working closely with the farmer. Furthermore, and this is of particular relevance to the Caribbean, many of the organic products most in demand are imported from tropical countries - tea, coffee, cocoa, and rice being particular examples.

Organic agriculture is already proving to be an effective system for re-structuring in many parts of the world where these traditional cash crops are grown. In West Africa and South America there are some highly successful organic projects which have turned around small and struggling rural communities. The excellent climate and the rich productivity of the Caribbean islands presents an opportunity to develop the supply of high quality, tropical produce to affluent European markets where demand is set to grow further.

#### THE EXAMPLE OF GUYANA

As some of you may know, I do not speak here from a theoretical perspective. Apart from farming organically myself, I started a food company eleven years ago to add value to organic crops and to create a source of income for my Charitable Foundation while, at the same time, benefiting the environment. The company is called Duchy Originals and it markets and sells products that use wholly organic ingredients - a company, by the way, which is growing at 60 per cent a year! When I visited Guyana two years ago, I had the opportunity to visit one of the less developed regions, and heard about how cocoa used to be a major cash crop for the country but whose cocoa industry had been redundant for thirty years. There and then, I suggested to the President that he might think about redeveloping it - using the old cocoa plantations - to supply beans for my Duchy Originals chocolate.

Since my visit two years ago, a small co-operative of 26 farmers and their families has been set up in conjunction with the National Agricultural Research Institute. I am delighted to be able to announce today that the beans have just been granted organic status by the Dutch certifying body, Skal. By the time they have been fermented, shipped and processed, I hope to be using them in Duchy Originals chocolate later this year - in time for Christmas! I am told, by the way, by those that know, that the quality of the chocolate from these organic cocoa beans is superlative.

Significantly, this particular project has not just been about economics, but has led to the regeneration of an entire community in a remote, rural area. The co-operative has set up a trading company that through the donation of a fax and computer from my Charitable Foundation has played a significant role in the development of communications in this remote region of Guyana. Through the High Commissioner, Edward Glover, and funding from the Department for International Development, a comprehensive project to re-vitalise the whole sector has been established, covering everything from basic training to ferment and store the cocoa beans, to plant breeding and intercropping techniques to diversify into other fruit crops for the local market.

In other words, a modest organic cocoa project has provided a perfect opportunity for small farmers from the disadvantaged Amerindian community to come together in mutual self help; not on the basis of hand-outs or altruism, but to meet the hard economic imperative of supplying demand for a growing market which they were in the unique position to supply. Their combined skills and hard work are slowly beginning to make a real difference to the quality of life in their community. They have gained self-respect and the respect of others.

What is also notable in this case is the fact that these Amerindian farmers have blazed a trail which other farmers in Guyana are likely to follow in the months ahead with different produce. Word is getting around to other small communities who want to follow the success of this

regeneration programme. And the impact is also being felt on some of Guyana's major producers. The Guyana Sugar Corporation, which represents Guyana's biggest national industry, has over the last two years set up a trial project to grow organic sugar. The first harvest is due this summer, and it could have a significant long term impact if expanded. I should like to take this opportunity to congratulate the Guyanese President and government, through the Minister of Fisheries, Crops and Livestock, the Honourable Satyadeow Sawh, who is here today, for seizing this initiative with flair and energy.

#### DUCHY ORIGINALS AND ITS PHILOSOPHY

Many of you here representing the producers will say that this is all very well, but we can only produce for markets that are open to what we are trying to sell. I agree, and the British supermarkets in this room know from hard experience, and to their cost, that I am a determined campaigner for them to do more both to stock organic produce, and to work harder to sell the undoubted benefits of such produce to their customers. My own food brand, Duchy Originals, has, I believe, had modest success in its aim of encouraging wider adoption of organic farming and food production.

By establishing links for this brand with projects such as the one in Guyana I hope to create what I can only call 'virtuous circles'. Through these virtuous circles the brand can support the development of small, but significant, community projects which will help to establish successful and sustainable agriculture, as well as communities, for the future. Not only that, but the consumer has the guarantee of eating more natural products, and the satisfaction of knowing that the profits of what they consume are being ploughed back into developing sustainable lifestyles in another part of the world - something which our marketing tells us is increasingly important to our sophisticated consumer. I continue to try to establish links in other countries, including Ghana and India, for the supply of new organic raw materials for the brand. I look forward to having more 'virtuous circle' stories to tell in the future.

#### THE BENEFITS OF ORGANIC

From my experience with the organic system, I know that there are no easy solutions, and I would not want anyone here leaving this conference believing that 'going organic' is an easy option. It is a slow process, which requires time for land to convert and to develop new farming techniques which complement the local environment and growing conditions instead of relying on chemical pesticides and fertilisers. A potential producer will also need to research carefully possible partners who have a niche market at home that they want to fill. It can often be so much easier to carry on in the same old way, however unprofitable in the long term, and however damaging that may be to the environment.

Yet 'going organic' also brings so many benefits: the potential for more secure, stable and long term markets, and therefore incomes, both because farmers are no longer vulnerable to commodity market trading, but more importantly because trade is channelled through close business partnerships.

capital is generally provided by investors prepared to take a deep breath and wait for their longer term pay back, instead of looking for an instant profit.

many organic projects are based on co-operative ownership, so benefits accrue to all members of the local community, especially when training and social welfare programmes are incorporated, which they frequently are.

it encourages diversification away from heavy reliance on monoculture systems to a variety of different crops, avoids reliance on commercially-owned varieties particularly and, most importantly if I may say so, the genetically modified ones - and benefits the environment by protecting natural diversity. Organic techniques also tend to be rooted in traditional, local methods

of production well-adapted over many centuries to the particular local terrain and micro-climate. Inevitably, quality follows.

## CONCLUSION

I know that these benefits are not necessarily seen by everyone as self-evident. So I am going to conclude with an appeal and a challenge - an appeal to the supermarkets, and a challenge to governments.

To the many in the audience who represent supermarkets, and other large commercial organisations, I should like to urge you to consider creating your own 'virtuous circles'. The experience of Duchy Originals suggests that your customers will respond. And you can have an impact on a much more significant scale than my small food brand. I hope that today's conference will open the door to many useful contacts in Caribbean countries who could become willing sources of supply.

And to those representing governments, I would remind you that your support is vital. It creates confidence, which is important when asking people to switch out of conventional agriculture and change the way they think. Governments can also look at how to develop local markets, rather than relying solely on the export market. Why not look at growing organic produce for tourist as well as for local consumption; creating local distribution businesses and fostering local economies? I can only challenge you to be more imaginative, and to embrace the organic opportunity as the Guyanese government has done.

By creating a positive political climate for sustainable agricultural development, I believe that you will give your producers a real chance to diversify, to compete, to win markets, and to prosper. At a time when people are rightly concerned about the threats of global competition and changing market patterns, I do believe that the organic approach offers an opportunity that demands your close attention.