

GEO

Guyana Economic Opportunities

Survey of the New York and Toronto Markets for Guyanese Products

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**KEN REFERENCES SEVERAL ANNEXES INCLUDED IN HARD COPY
FORMAT ONLY – DO YOU HAVE THOSE?**

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 the SME sector is its 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 a well known fact that there are large Guyanese expatriate communities in 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 Toronto and New York City. This assignment exclusively focused on these two North American markets. It represents a first step towards equipping the SME sector with the necessary information and tools required to penetrate new markets.

The consultant traveled to Georgetown, Guyana to become familiar with the SME sector and its products before carrying out the market survey in Toronto and New York.

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 New York and Toronto. However, there are some major constraints and drawbacks that must be addressed to increase exports to the North American market from Guyanese firms. Addressing these issues will require a planned and coordinated effort.

The following product categories were examined during the market study:

- Fresh produce
- Processed foods
- Seafood
- Food supplements
- Kitchen implements
- Gold jewelry

The interviews conducted in both markets did not reveal interest in the furniture or handicraft market.

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: To a high degree, the target markets for Guyanese products in the two market areas are immigrants from Guyana, rather than from the West Indies in general. While specific data were not available, there are approximately 400,000 Guyanese in New York and 140,000 in Toronto. Their per capita income is said to be above average in New York and about average in Toronto, relative to that of other ethnic groups.

Penetration, Competition, Opportunity: The following table summarizes in general terms the degree of penetration, level of competition and opportunity for Guyanese products in the New York City and Toronto markets:

Table I
Penetration, Competition, Opportunity

Product	Mkt.	Penetration	Competition	Opportunity
Fresh produce	NY Tor	Little Substantial	Substantial Substantial	Little at present Some
Processed foods	NY Tor	Substantial Substantial	High High	Some Some
Seafood	NY Tor	High Substantial	Substantial Substantial	Some Some
Food supplements	NY Tor	High High	Substantial Substantial	Little Little
Kitchen implements	NY Tor	Substantial Little	Substantial Some	Some Some
Gold jewelry	NY Tor	Negligible Little	High High	Some Some

Obstacles and Overcoming Them: The following table includes some of the major obstacles and solutions that must be addressed to increase to the target communities in New York and Toronto.

Table II
Obstacles and Solutions

Obstacle	Solution
Inadmissibility of most fresh produce to the U.S.	<ol style="list-style-type: none"> 1. Increase requests to APHIS to add more products to the admissibility list. 2. Try drying, canning or freezing more fresh produce.
Expensive transportation and shortage of air cargo space (especially to Toronto)	<ol style="list-style-type: none"> 1. Form a freight users group to work for improvements. 2. Employ a consultant to study transportation constraints and recommend improvements.
Poor product quality	<ol style="list-style-type: none"> 1. Hold workshops in which importers from NY and Toronto will be among the presenters. 2. Install cool and cold storage and fumigation chambers at the airport in Georgetown. 3. Help food processors become certified to HACCP.
Poor packaging and labeling	<ol style="list-style-type: none"> 1. Hold workshops in which importers from NY and Toronto will be among the presenters. 2. Establish a package design center in an existing Guyanese organization. 3. Facilitate importation of materials for packaging and labeling.
Export “red tape” in Guyana	<ol style="list-style-type: none"> 1. Establish a “one window” export documentation system. 2. Assure that the system is clean and transparent.
Lack of an export mentality	<ol style="list-style-type: none"> 1. Hold workshops in which importers from NY and Toronto will be among the presenters. 2. Develop a system of recognition and awards for successful exporters.

Section I – New York City Area Market Survey

Summary – WE MIGHT THINK ABOUT REMOVING ENTIRE SUMMARY

There are two views of the potential for products of Guyana in the New York market:

1. Most fresh produce is currently not admissible and processed foods are being provided by the U.S., Canada and other countries. The market for fish is well supplied and there is little demand for handicrafts.
2. Fresh produce will sell well if it can be imported. Guyanese prefer their authentic processed foods, there is high demand for fish, and cookware and cooking utensils will sell if the quality is improved.

NOTE: I THINK THESE TWO VIEWPOINTS COULD BE REMOVED.

The Market: The market is large – approximately 400,000 Guyanese with good purchasing power, who prefer their foods to others.

Potential: The products with greatest potential appear to be cassava bread, thyme, noni juice, kitchen tools, and processed fruits and vegetables such as dried spice mangos.

Penetration and Prices: There are good quantities in the market of Guyanese seafood, food supplements, and processed foods, and to some extent kitchen implements. In general they sell for reasonable prices, although competing products are often cheaper.

Competition: There are several kinds of competing products: “Guyanese style” products produced or packed the U.S. and Canada, items from other West Indian countries, and items from other countries such as India and China.

Other Potential Products: Persons interviewed had few ideas with regard to other potential products; however, a few were suggested and are listed in this report.

Intermediaries: There are only a few major companies that import from Guyana and distribute Guyanese products. The major players are Bedessee, Dave and La Preferida.

Opportunities, Constraints, Keys to Success: There appear to be opportunities to increase exports of processed foods, seafood, kitchen implements and gold jewelry. Some obstacles to doing this successfully are poor packaging and labeling, the high cost of transportation and the lack of an export mentality in Guyana.

Import regulations: The Animal and Plant Health Inspection Service (APHIS) of the U.S. Department of Agriculture (USDA) must approve each kind of fresh produce being imported from a particular country into the United States. This represents a considerable constraint to the admissibility of Guyanese produce to the U.S. market. Currently, there are very few Guyanese products on the APHIS admissibility list (the list is included in

Annex ??). There have also been problems with importing approved produce that was found to harbor insect pests, and processed foods whose labels did not conform to U.S. regulations.

Next steps: The next steps to access the markets are similar for the U.S. and Canada. They are mentioned in Table II above and are described in this report.

Acknowledgements

The researcher is grateful to Ms. Donnette Critchlow, of the Guyanese embassy in Washington D.C. for providing initial contacts in the New York area.

Introduction

As expected, there are considerable differences between the target market for Guyanese products in the New York City area and Toronto. As evidenced previously, the New York City area boasts of a much larger population. The people, stores and importers are spread over a wide area which includes the New York City boroughs of Queens, Brooklyn, the Bronx, as well as parts of New Jersey. Although the transportation options from Guyana to New York are better than those available in Toronto, entry of most fresh produce is not allowed due to the APHIS phytosanitary regulations. There are fewer local manufacturers of “Guyanese style” products in New York, however, these products are easily imported from Toronto. Due to these marked differences, the approach to research and the market for Guyanese products must be carefully tailored to each area.

A. Snapshot of the New York Target Market

How large is the market?

According to the U.S. census, in the year 2000 there were approximately 723,127 West Indians in the state of New York. It is assumed that about 700,000 of these are in New York City. The census does not provide the number of Guyanese in the area, however it is estimated to be between 400,000 and 500,000.

Where do they live?

Approximately half of the Guyanese population lives in Queens, in an area known as “Little Guyana”.¹ Most are Indo-Guyanese and their income is at least average for the area. There are several jewelry stores on Liberty Avenue that advertise “Guyanese gold.”

There is a sizable population in Brooklyn². It is predominantly Afro-Guyanese, who share retail stores with persons from Jamaica, Trinidad and other countries. The area is highly congested. Due to high rent, West Indian stores are located on secondary streets or at some distance from the main intersections (Church/Nostrand and Church/Flatbush). The income level of the population is lower than the New York City average but at least as high as those of the African-American and Hispanic-American communities. Guyanese bakeries seem to be especially popular in this area.

The third settlement in importance is in the Bronx, especially the northern part, and across the border into the city of Mount Vernon, New York. Here there are Guyanese of various ethnic backgrounds, mainly Indian, but also Chinese. In general, their income is said to be above the average for New York City.

¹ “Little Guyana” is centered at about 123rd Street and Liberty Avenue. It stretches for several blocks in both directions.

² The Brooklyn population is located in the general area of Nostrand and Flatbush Avenues and Church Street.

There is also a small but growing community across the river in New Jersey, specifically in the towns of Jersey City, Newark and East Orange. These communities frequent West Indian stores in Brooklyn and Queens.

What is their estimated purchasing power?

According to the census, the median household income in 2000 was \$27,547 in Bronx County, \$26,108 in Kings County (Brooklyn) and \$35,820 in Queens County. Assuming 100,000 Guyanese households with an income of \$30,000 each, the total income would be \$3 billion per year. Since spending on food is a priority, the size of the market for food products is substantial.

What are their buying habits?

Spending on food is a priority for this target market. Generally, most people shop in West Indian stores once a week. Both men and women shop, and to some extent, this has become a family event.

Annexes B and C include information regarding the businesses serving the Guyanese and West Indian communities in the area.

B. Guyanese Products with Greatest Export Potential

There is potential to increase sales of Guyanese products in the New York market. Products with the most potential include:

- fresh produce
- packaged/processed foods (e.g. dried spice mango and honey)
- supplements (e.g. new brands of tonic and noni juice)
- cookware (e.g. large aluminum pots and rolling pins)
- gold jewelry (Guyana has a good name for jewelry)

To sustain increased sales, SMEs in Guyana must produce “export quality” goods – this applies to all types of products. This includes not only the quality of the actual product, but its packaging as well. A higher quality of fresh produce will facilitate the admissibility process through APHIS. Another limiting factor to increasing sales is the prohibitively high transportation costs.

Requests from an Importer

Dave, a major importer, expressed interest in Sheik Garam masala, Daddy's Achar, Peppys products, black pepper, Chinese sauce, Flavor Mate essences, Prestige products, and mustard flavored hot sauce (must be in glass bottle). He asked for a price on tamarind balls, 4 balls per package with nice labels, 25 packages per bag and 4 bags per box.

He would like a price also on honey in wide mouth jars. He now sells honey at \$0.50 for 8 oz (227 g). He went on to ask for prices on dried shark fillets, Chinelle essences, and cassava bread (must be packaged so it won't break). He said that a lot of noni juice was being sold.

He emphasized, however, that the packages should be of thicker plastic and should be folded before they are sealed. Also all bottles should be new and have tamper proof lids, and they need nutrition labeling.

C.

C. Quantities, Prices, and Penetration of Guyanese Products

Quantities and Prices in the Market

People in the trade are reluctant to talk about quantities and prices. U.S. import statistics show the following entries, from Guyana to the U.S., in the year 2001:

Table III
Selected Imports from Guyana to the U.S. in 2001³
Source: U.S. Bureau of the Census

Product	Approx. Quantity	Value
Fish	1,128,000 Kg.	5,047,400
Shrimp	11,690,000 Kg.	5,179,300
Rice	288,000 Kg.	40,100
Plant parts for herbal tea	1,100 Kg.	5,800
Sugar	12,094,000 Kg.	4,952,300
Malt extract	6,500 Liters	13,400
Pasta and couscous	111,000 Kg.	76,600
Preserved vegetables	127,600 Kg.	127,600
Condiments, seasonings	1,700 Kg.	1,700
Other sauces and similar	400 Kg.	4,300
Other food preparations	26,000 Kg.	211,500
Aluminum cookware	1,767 pieces	12,000

Fresh Produce: Guyana must make a concerted effort to increase the number of APHIS approved admissible products to the U.S. Currently, it can send products that are already arriving from all countries, including cassava and yams, and it can send a few other products (artichokes, beans, cocoa bean pods, cucumbers, eggplant, okra, peppers and pumpkins) to North Atlantic ports. It can export cocoa bean pods to South Atlantic, Gulf and North Pacific ports.

³ Values are Customs Value in U.S. dollars

There is little fresh produce from Guyana on the New York market. A high level of competition exists from Trinidad and Jamaica. The produce arriving from these countries tends to be of a higher quality, better packaged, and transported at lower rates.

Processed foods: There are substantial quantities of Guyanese processed foods on the market. Processed foods imported from Guyana are side-by-side with “Guyanese style” products and other competitors.

Seafood: Seafood from Guyana is on the market and is preferred by consumers. Yellow gilbaka, snapper, cuffum, butterflyfish, bangamary, Guyana hassa, white belly shrimp and black shrimp are found in numerous stores.

Food Supplements: Ferrol Compound, Limacol and other products of Guyana Pharmaceutical Company are in all the stores, along with competing products. The stores also carry noni juice, but not from Guyana.

Cookware: There are purple heart rolling pins and some of the big aluminum pots, stirring spoons, dahl gurneys and chopping blocks from Guyana available on the market. However, the majority of the cookware available is provided from other countries and has a better quality.

Gold: There are numerous jewelry shops that advertise Guyanese gold, but apparently not much actual jewelry from Guyana. Gold from Guyana is upgraded to 21 carat and made into jewelry in the U.S., although one shop reported sending designs for production in Guyana.

Furniture and Handicrafts: None of these from Guyana were observed on the market.

Penetration of Guyanese Products

Perhaps the products with best penetration are Ferracol compound and other products from the Guyana Pharmaceutical Co., which are imported to the U.S. by La Preferida (based in Chicago) and distributed by a company called Eve’s, in the Bronx. These products are in 100 percent of the West Indian stores visited.

There is also nearly complete penetration by fish, which is always in demand. Most stores have both freezers and coolers for fish. In some cases it sells so fast that it is neither refrigerated nor frozen in the store.

There is good penetration of processed foods handled by Dave Corp. (including Beharry products) and by Bedessee, whose list of products is included in **Annex XX**. However, only some of these are actually from Guyana.

Penetration of other processed goods from Guyana, the few fresh foods that can be entered into the U.S. and cookware is

What Some Stores Are Selling
R&A Islamic Enterprises Inc. in Queens has Guyanese products from Indo-West Indian Trading including Allspice at \$1.99 for 3 ounces, mustard flavored oil (packed in New York) at \$2.99 for 16 ounces, coconut oil (packed in the U.S.), and chutney, casareep and achar (packed in U.S.) at \$3.99 for 14 ounces, and vegetable ghee (packed in U.S.) at \$3.99 for 12 oz (344 grams)
Guyana West Indian Grocery in Queens has casareep and other products purchased from a trader, M.Hanif, as well as Guyanese aluminum kettles and wood cooking utensils.
Annjee's in Queens sells mostly Indian good but has wooden rolling pins, cutting boards and mixers from Guyana, all at \$4.99 each. He also has aluminum cooking pots.
J&B West Indian Grocery in Queens says Banks sodas sell well, and they think Banks beer has good potential.

lighter. However, nearly all the rolling pins seen in stores were made in Guyana.

There are reportedly some imports of gold jewelry, although this does not appear in U.S. import statistics.

D. Major Competing Products

Fresh Produce: The few fresh produce items that can be imported from Guyana compete with similar items from Jamaica, Trinidad, the Dominican Republic and other countries. For example, pumpkins from Jamaica are very good and cost less than those from Guyana (a large percentage of the pumpkins available are also arriving from Trinidad). Thyme comes in part from Jamaica and New Jersey (Trinidad is beginning to export thyme), and eddoes mostly from Jamaica.

Processed Foods: Here, the competing countries depend on the item. There is good pepper sauce from Trinidad, noodles from Canada, curry from India, tamarind balls from Thailand, etc. Nearly all the competing products are better packaged and less expensive than similar items from Guyana. Apparently, the one advantage that Guyana has is the image, especially among Guyanese customers, that products from their country are more natural and taste better.

Seafood: Other Caribbean countries have most of the same species that Guyana has, although some Guyanese think their coastal fish taste better because the rivers that run to the sea are not polluted. Other countries do, however, have a freight advantage.

Dried fish are not in high demand and the supply is plentiful, with prices from about \$3.00 to \$7.00 per pound. Much of the dried fish on the market is from Canada.

Cookware: Nearly all the pots sold in West Indian stores are from the Imusa company in Colombia. The quality is excellent and they come with lids. Guyanese pots do not have lids. Wooden paddles, spoons, cutting boards, and other cookware come from various countries, including India. Competing countries have better dahl gurneys. These products usually look better than similar ones from Guyana but are not always made of solid wood.

Competing Products in Local Stores

Spice World has eddoes at \$0.99 and \$1.20/lb. It imports achar in bulk and bottles it locally. It also carries Beharry curry made in New York, pumpkins from Trinidad, bora from the Dominican Republic, etc.

It has Champion noodles from Guyana at \$1.39 for 454 g. (16 oz), Carib Yana brand from Venezuela at \$1.99 for 20 oz., Lam's from the U.S., Norman Sue from Canada, and Sheik from Trinidad.

It has Chubby punch from Trinidad, Goya guava jelly at \$2.99 for 482 g. (17 oz), Clover brand essences from C. Kenneth Imports at \$1.59 for 4 oz. (120 ml), Matouk and other hot sauces, Chief curry from Trinidad at \$1.99 and \$4.99, and split channa from Trinidad

R&A Islamic Enterprises has Brown Betty mango jam from Bedessee at \$1.99 for 10.5 oz, Matouk green seasoning from Trinidad at \$2.49 for 8 oz, and Sari Miracle sauce from Ricks & Sari in Canada at \$1.99 for 8 oz.

H. West Indian Grocery in Queens has very little that is made in Guyana. They buy mostly from Dave's and Bedessee. There are Long beans, breadfruit and eddoes, all \$0.99 a pound, roasted geera from Canada at \$2.99 for 6.5 oz, etc. They have Twins products but say they move slowly.

Guyana West Indian Grocery has West Indian mixed essences from Kwak Imports in the Bronx and salt fish, \$2.99/lb., (without bones \$4.99/lb). I did not determine the country of origin of the fish. Tahitian Noni Juice is the major brand. The distributor can be found on the World Wide Web at www.caribbean@tahitiannoni.com.

J&B West Indian and American Grocery in Queens has noni juice at \$29.99 for 32 ounces and says it sells OK. They also have Chatak chutney, garam masala etc. from Canada, Marian curry powder at \$1.99 for 16 oz, distributed by Marian Spice Corp. in Jackson Heights, Bedessee garam masala in a double bag, wooden spoons and stirrers at \$3.99 each, and other wood and aluminum articles. They have no problem getting enough fish at decent prices. Many of their products are bought from the trader, M. Hanif, phone 718-468-5964.

Key Food in Queens sells Indra West Indian pepper sauce from Costa Rica at \$2.19 for 11 ounces; indra geera, garam massala, casareep (\$3.99 for 15 oz.); Lall's geera from India; honey (8 oz. \$0.99-\$1.19); Dave's peanut punch (made in Florida); Guyana peanut punch (\$1.99 for 10 oz.) distributed by AFN LLC, New Jersey; flavor mate essences (\$3.99 for 7 ounces); Eddoes from Jamaica at \$0.89/lb.

A Farmboy Market sells Guyana and Est India soda, distributed by HTOND, NY; Shirley's noodles (U.S.) for \$1.79 for 24 oz.; Lam's noodles (U.S.) for \$0.99 for 12 oz.; Champion noodles (Guyana) for \$1.99 for 16 oz.; Brown Betty noodles (Canada) for \$0.99 for 12 oz.; Grace products from Jamaica; Guyanese Pride essences, coconut oil, and casareep from Bedessee; Bedessee mustard oil made in the U.K.; dried fish from Canada; curries from Trinidad – Turban and Kola brands; Billy Bee honey (Canada) for \$0.99 for 250 grams.

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

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

- Locust bark
- Halal canned meat
- Processed mangos, pineapple and other fruits
- Mixed fruits for use in pastries

NOTE: NEED TO CONFIRM THAT THESE ARE NOT BEING EXPORTED TO NEW YORK.

F. Distribution Chains and Intermediaries

There are a few major players in the importation of Guyanese and West Indian foods. The ones identified are mostly Guyanese, although Korean-owned companies have a large share of the produce trade in New York, including West Indian produce. This is true in the Bronx and in Brooklyn, both of which have terminal markets. Distributor contact information and brief comments are included in Annex C.

G. Constraints to Exporting

The primary constraints to exporting to New York are summarized below:

- Lack of admissible fresh products
- Poor product quality
- Poor packaging
- Expensive air and sea freight
- A lack of effective distribution for some brands.

Admissibility: More products need to be included on the APHIS list. However, having a product on the list does not guarantee that it will make it through to the market. Two persons reported having shipments of approved products rejected because of insect pests.

Quality: Bedessee Imports producing noodles, in part because flour in Guyana is not clean. Processed foods don't have proper preservatives.

Packaging: Bedessee is exporting boxes from Canada to Guyana, although duty is charged on them, because the boxes made in Guyana are expensive and lower quality.

Expensive Freight: Storekeepers, especially, said that if an item from Guyana costs a few cents more than that of a competitor, and if freight also costs a few cents more, either

the product must sell at a higher price or the store owner must be willing to take a very low margin.

Distribution: For example, Twins essences are not distributed as well in New York as they are in Toronto.

H. Keys to a Successful Relationship

With exporting in general, the keys to a successful relationship are to be competent and honest. Competency implies producing, packing and shipping exactly what was ordered and on the scheduled dates. Honesty implies the same thing, but in a slightly different way. An incompetent firm might let impurities enter its product, while a dishonest firm might purposely alter its product. Either way, the result will be disaster sooner or later.

In exporting one should clearly determine a target market and a sales forecast prior to preparing an appropriate marketing plan. There are few, if any, firms in Guyana that have product/package/brand, distribution, pricing, promotion, shipping and payment strategies designed to sell known quantities of goods to defined target markets.

I. Import Regulations

There are no import duties from Guyana on most of the products covered by this study. The following is a summary of the import regulations. Additional details, and sources of clarification of the regulations, can be found on the websites of the U.S. Department of Agriculture, Food and Drug Administration (FDA), and Customs.

Fresh Produce: As already mentioned, the main regulation that hampers exports from Guyana is that each kind of fresh produce, from each country, must be ruled admissible by the Animal and Plant Health Inspection Service of the U.S. Department of Agriculture. To obtain admissibility status, the Government of Guyana or a U.S. importer must request approval and, essentially, prove that the product in Guyana does not host insects that could harm agricultural crops in the U.S.

To all U.S. ports, Guyana can ship fresh allium (onions and garlic), apples, asparagus, bananas, basil leaf, cassava, cinnamomum leaf, corn (green), dasheens, durian, ginger root, lemons (smooth skinned), lettuce, limes (sour), oranges (sweet), palm heart, pineapple (except into Hawaii), pokeweed greens, strawberries, watercress, and yams.

In addition, to North Atlantic ports it can ship globe artichokes, beans, cacao bean pod, cucumbers, eggplant, okra, pepper and pumpkins. It can ship cocoa bean pod to South Atlantic and Gulf and to North Pacific ports.

In some cases, a product that might harbor harmful insects can be approved for admission with a specified treatment. For example, fresh mangos can come from companies that have approved hot water dip plants. Currently there are no such treatment plants in Guyana.

As noted, even shipments of a product that is admissible can be rejected if harmful insects are found on the product or its package. The presence of insect pests in one box of a shipment is usually grounds for rejecting the entire shipment. One importer from Guyana reported having this problem with a shipment of pumpkins.

The other important regulation relates to pesticide residues. The U.S. Environmental Protection Agency has determined the kinds of pesticide residues that can be present on each type of agricultural product exported to the U.S., and the maximum residue of each pesticide. Although interviews did not reveal any shipments from Guyana being rejected because of pesticide residues, this can be a problem if farmers begin using more insecticides, herbicides and/or rodenticides without knowing or paying attention to the regulations.

In addition, fresh produce shipped to the U.S. should arrive in good *condition*. This is different from *quality*, which is a commercial term and is determined by the importer. Thus, a poor quality pumpkin will be admitted by Customs if it is in good condition, but the market may not accept it.

Finally, each box of produce should be marked with the weight and the country of origin.

Processed Foods: Processed foods, in general, must meet standards determined by the U.S. Food and Drug Administration. These relate to cleanliness and sanitation. Each item should be free of foreign matter and of microorganisms that might endanger human (or animal for animal feed) health. This includes, for example pesticide residues, insect parts, rodent hair excreta, and bacteria.

The presence of foreign matter in a processed food usually means that the production process is not adequately controlled. The result has been the growing use of process management systems such as Hazard Analysis at Critical Control Points, HACCP. Companies that plan to ship to the U.S. should become certified in HACCP.

The packaging, i.e. bottles, should be sanitary and have tamper-proof lids.

A processed food must contain what it is said to contain. For example, to label an item "Mustard Oil" would be misleading if it contains large amounts of some other item as a "filler." Ingredients must be listed on the label, in descending order of content by weight.

If a company sells more than 100,000 units of an item per year, it must put the nutritional content on the label. This requires laboratory analysis to determine the types and amounts of nutrients in each product.

Finally, a product's label should give the net weight in grams and ounces, the country of origin, and enough information to permit a consumer, or regulatory authority, to identify the producer, exporter, importer or distributor. That is, there should be a way to trace each product and find out which companies were involved in producing and marketing it.

There is also a regulation on low-acid canned foods, such as most palm hearts packed in water with salt. The processors of such foods must apply and obtain Food Canning Establishment (FCE) numbers from the U.S. Food and Drug Administration.

Fish: The FDA has determined that all fish sold in the U.S. must be processed in a facility that essentially follows the procedures of the Hazard Analysis at Critical Control Points system. Only four foreign countries have recognized government agencies that can certify a processing plant to HACCP. In the case of imports from other countries, it is the importer's responsibility to ascertain that the product he/she sells was processed in accord with HACCP procedures. The FDA can verify that an importer has done the required due diligence.

In addition, fish must be clean and sanitary and must not contain excessive amounts of mercury or other substances that might harm the persons (or animals) who consume them.

Dietary Supplements: Dietary supplements are not highly regulated at present. They should be clean and pure and be marked with the country of origin and the name of the producer, exporter or importer. As with food products, the label should state the ingredients and the contents in ounces and grams. It is important not to make, on the package or in advertising, any medical or other claims that cannot be substantiated by scientific evidence.

Cookware: There are no special regulations for products such as cookware, handicrafts and furniture, except that they not be hazardous. For cookware, that implies no lead or other minerals that could leach into the food. For handicrafts there are probably no special implications. For furniture it implies that it not have, for example, exposed nails that could injure someone.

J. Next Steps to Access the Market

First, Guyana should make a major effort to add to its list of admissible fresh produce items. This is a difficult process, which begins by contacting the following organization:

APHIS/PPQ
4700 River Road, Unit 136, Riverdale, MD 20737-1236
Phone 301-734-5055, fax 301-734-5786.

Second, it should do brief feasibility studies on producing and exporting new processed foods, such as sun-dried spice mangos.

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

Fourth, it should encourage and help exporters to improve the quality of their products and their packaging, labeling and export packing. Establishing a small package design center would be useful. Importation of packaging and packing materials should be liberalized.

Fifth, the Government should establish a quick, inexpensive one-window system for export documentation.

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.

Section II – Toronto Area Market Survey

Summary –WE CAN CONSIDER REMOVING ENTIRE SUMMARY

The Market: The primary market in Toronto for Guyanese products is the Guyanese population of approximately 140,000 persons. Although their average income is low by Canadian standards, buying food is a priority. The secondary market is other West Indians in Toronto; however, they can buy their own products in their own stores. The tertiary market is persons of Indian, Chinese and other backgrounds who might buy their ethnic products from Guyana, if these were competitive in quality, price and delivery.

Products: The demand is high for Guyanese fresh fruits and vegetables, some root crops and fresh and frozen seafood. These are definitely favored over other products of other countries and are in short supply because air cargo space is limited.

Quantities, Prices, Penetration of Guyanese Products: It is difficult to determine quantities, prices and penetration of Guyanese products because timely information is confidential or not available. In the first three-quarters of 2001, Guyana exported C\$1.5 million of seafood to Canada. This is more than for the entire year 2000. In the same period it exported C\$342,000 in fresh fruits and vegetables, C\$91,000 in processed foods, and C\$2 million in beverages, spirits and vinegar (mostly rum). Some of these products were sold outside of Toronto. Additional products came in unregistered as personal possessions.

Some retail prices, and approximate wholesale and retail markups, are included in this report. The prices of products from Guyana range from competitive to about three times those of similar products from other countries.

Guyanese products have fair penetration in stores owned by Guyanese, some penetration in other West Indian stores, and almost none in stores of other ethnic groups or in supermarkets.

Competitive Products: Products from Guyana compete with those of other West Indian countries, India, China, and “Guyanese style” products made in Canada. *If producers and exporters in Guyana do not improve very soon, they may see their own market invaded by Guyanese-style products made in other countries.* **NEGATIVE - THREATENING**

Other Potential Products: Producers in Guyana could enter the Toronto market with value-added goods such as sun-dried mangos, dried and waxed yams, and large aluminum cooking pots. They should look for products that are not highly perishable and that can be shipped through the U.S. with no regulatory problems.

Distribution Chains and Intermediaries: In general, the channel of distribution is from the importer/wholesaler direct to retail stores and restaurants. Stores are by far the larger of these two markets.

There are only a handful of major importers from Guyana, and these are described in the report. At least two persons have stopped importing since Guyana Airways went out of business in the summer of 2001.

Export Opportunities, Constraints, and Keys to a Successful Relationship: There are clearly export opportunities for seafood, fresh produce and some value-added foods. Unfortunately there are also severe constraints including transportation, packaging, the generally unreliable image of Guyana's producers and exporters, and competition.
NEGATIVE NEGATIVE – COULD BE STATED DIFFERENTLY

The keys to a successful relationship are to select a competent, honest importer/distributor, give him/her exclusivity for a specified period of time, and then consistently provide him/her with high quality, well packaged products on time and at stable prices.

Import Regulations: All importers report that Canadian regulations on importing and on health and sanitation are not a problem, as long as the producer and the exporter in Guyana meet Guyanese food sanitation and export documentation requirements. Additional details about the regulations are provided in this report.

Other Useful Information: There were frequent complaints that this kind of study has been done before, with no useful results, and that exporters in Guyana face high costs, receive little assistance, and must pay bribes for their export documentation and to get air cargo space.
NEGATIVE NEGATIVE – EITHER WE REMOVE OR SUBSTANTIATE HOW THIS STUDY IS DIFFERENT.

Next Steps to Access the Market: A logical next step is to thoroughly analyze this report and form a high-level public-private sector committee to analyze its implications, set goals and plan corrective action. To access the market will require major cooperation by the country's business and government leaders.

Acknowledgements

The consultant would like to acknowledge the cooperation and support of the Consulate of Guyana in Toronto, which provided initial contacts, suggested other sources of information and worked to track down missing product samples. Their assistance was valuable.

Assistance was received also from Mr. Ramanand Prashad, Managing Director of Prestige Manufacturing and Bottling company in Guyana, who lives in Toronto. In studying an ethnic market, it is helpful to have a member of that community who knows it well and is willing to provide feedback and ideas.

In addition, executives of both the Bedessee and Kiskadee companies met with me at length and shared their knowledge of the Guyanese market in Toronto. Their cooperation was valuable and was greatly appreciated.

Introduction

Guyanese expatriates living in Toronto seem eager to keep in touch with Guyana, and regretful that conditions in their country are such that they felt compelled to seek their fortunes elsewhere. **NEGATIVE (NOT EVEN NECESSARY)**

Almost without exception, they were friendly and cooperative with this study of the market for Guyanese products. Only one store-owner failed to cooperate, and she may have suspected that the consultant was trying to get competitive information for the owner of a neighboring store.

A. Snapshot of the Toronto Target Market:

How large is the market?

The latest census figures are from 1995, and there do not seem to be other scientifically-based estimates. Based on the available information, there are approximately 140,000 Guyanese and from 400,000-500,000 West Indians in the Toronto area. This includes both legal and illegal residents and their descendents. There are also non-West Indians who sometimes buy Guyanese products. The Caribbean is much closer than Asia and serves as a natural source of Asian products.

Where do they live?

Guyanese and other West Indians live and shop in three main areas of the city. They are located just north of the center of the city, along Eglinton Avenue, along Jane Street, and in Scarborough.⁴ Although there are West Indian families and stores in other areas, the three listed account for approximately 90 percent of the target market.

What is their estimated purchasing power?

Although reliable statistics regarding the purchasing power of the target market were not available, a conservative estimate can be made based on the following assumptions:

- 140,000 Guyanese, assuming 4 persons per family (lower than in Guyana) = 35,000 families.
- Assume 50,000 persons employed in these families.
- Assume an average wage of C\$12.00 per hour. C\$12 X 40 hours X 50 weeks X 50,000 persons = about C\$1.2 billion in total income. Since food purchases are a high priority item, it can be concluded that the purchasing power is substantial.

⁴ Eglinton Avenue (east and west), near Dufferin Street, just north of the center of the city; Jane Street, north northwest of Eglinton/Dufferin and north of Freeway 401; Scarborough, east of Parkway 404 on both sides of Freeway 401

What are their buying habits?

The interviews revealed that Guyanese families normally eat at home rather than eating out. They shop once a week in West Indian stores and spend C\$50 to C\$60 each time (C\$50 X 35,000 families = C\$1.75 million/week spent in these stores). They also shop in supermarkets for paper goods, soap and other items.

B. Guyanese Products with the Greatest Export Potential

Guyanese products with the greatest potential for increased exports to the Toronto market include:

Fresh fruits and vegetables: there is clearly unmet demand for Guyanese fruits and vegetables on the Toronto market. Guyanese produce has the reputation of tasting better and being more healthy because it is “natural,” or nearly so. Guyana is known for limited use of fertilizers and pesticides. Focus on the natural aspect of its products would be helpful (this was corroborated by a distributor, Tropipak). Importers report that twice the current quantities could be sold without affecting the price. Specific products with the most potential include spice mangos, long beans, bora, hot peppers, spinach and eddoes. Higher quality, better packaging, and competitive prices will facilitate increased sales of these products on the market.

Prepared/processed foods: Guyanese products with the most potential in this area include cassava bread, casareep, hot sauces, jams, jellies, honey, spices, beverages, and sweets. Since competitors are also selling these products, Guyanese businesses interested in further penetrating the market must focus on quality improvements and cost competitiveness.

Seafood: Fresh and frozen seafood, especially shrimp (including dried baby shrimp), gray snapper and bangamary, are in good demand. To increase sales, businesses will have to improve packaging.

Cookware: Guyanese aluminum pots, rolling pins, and other kitchen implements are rarely seen on the market. However, they should have some potential if the quality is improved and transportation costs are reduced.

Gold Jewelry: This market may have long-term potential, but limited short-term prospects in Toronto.

To expand sales in the product areas mentioned, businesses should work with the same people and companies in Toronto that have experience importing from Guyana. It is important to note that one distributor, Bedessee, mentioned that Guyanese businesses should focus on local and regional markets until they have products that will be competitive in North America. Quality and price competitiveness issues must be addressed.

C. Quantities, Prices, and Penetration of Guyanese Products

Quantities and prices (WS and/or RT) of these products in the market from Guyana

Imports to Canada from Guyana in the first nine months of 2001 included the following:

Table IV
Selected Imports to Canada from Guyana, Jan.-Sept., 2001

Product Category	Canadian Dollars
Fish and shellfish	1,504,000
Vegetables, roots and tubers	119,000
Edible fruit and nuts	223,000
Coffee, tea and spices	17,000
Processed meat, fish, shellfish	26,000
Processed cereal, flour, starch	10,000
Processed vegetables and fruits	9,000
Other processed foods	29,000

Canada's imports from Guyana totaled approximately C\$192,021,000 in 1999, C\$197,800,000 in 2000, and C\$209,474,000 in 2001. Of the total in the year 2000, 93.13 percent was of precious stones and metals. There were C\$1.9 million in beverages and vinegar, C\$1.3 million in fish and shellfish, C\$118,000 in preserved fish, and C\$107,000 in vegetables and tubers.

By far the largest category of registered imports to Canada from Guyana is semi-precious stones. The next two (far distant) categories are ore/slag and then beverages/spirits/vinegar (mostly rum). There are also some mineral fuels, organic chemicals, pharmaceutical products (Ferrol Tonic, Limacol etc.), essential oils, miscellaneous chemicals, wood and wood products, wearing apparel, aluminum articles, mechanical appliances, electrical machinery, optical equipment, and furniture (C\$31,000 from January through September).

What is selling on the market?

According to importers, approximately 40,000 to 50,000 Guyanese spice mangos are sold each week – about half are supplied by **Kiskadee**.

Kiskadee imports approximately 1,000 pounds per month of Guyanese long beans and they sell at C\$3.99 per pound, compared to Dominican long beans which sell for C\$1.99 per pound. Kiskadee thinks this is too large a gap to be sustained.

On March 7, importer **Krish Synanon** had 35 boxes of bora, each 18 pounds, and sold them easily. He thinks though that the market could easily be saturated.

Charley's West Indian Foods reported buying Guyana peppers at C\$5.00 per pound and selling them for C\$6.99 per pound. He sells bora for C\$3.89.

Charley's also has Geeta brand casareep from Guyana at C\$5.29 for 12 ounces, Brown Betty at C\$3.59 for 15 ounces, and Royal at C\$3.99 for 10 ounces. He sells Champion chow mien noodles for C\$2.29 and a similar product from Bedessee for C\$0.89. Still, he doesn't think Guyanese in general will pay more than 10-15% extra for products from Guyana.

One importer said that juices from Chin cost C\$0.50 in Guyana, C\$0.60 on arrival in Toronto, C\$0.75 at wholesale, and C\$1.29 at retail.

H.P. Tropical said they could sell 15,000 pounds of frozen seafood a year and 3,000 pounds of fresh seafood every week, but the airline gives him space for only about 800 to 1,000 pounds.

Bedessee is the importer for Ferrol Tonic and Limacol and has them in numerous stores.

Penetration of Guyanese Products in the Market

In fresh foods, the West Indian market for spice mangos is dominated by importers from Guyana. Guyanese producers also do well with long beans, bora, eddoes and other vegetables and roots in stores owned by Guyanese. Although specific data were not available, it is estimated that out of 150 "West Indian" stores, approximately 40 are Guyanese-owned.

Royal and Beharry products are also in most Guyanese-owned stores, but with severe price disadvantages. Most other Guyanese foods are actually produced or packaged in Canada.

Twins products do well on the market. This is probably because they are well packaged and reasonably priced and have an active exclusive importer/ distributor (a family member who reportedly works from her house).

There is fish from Guyana in numerous stores. Importers complain, however, that transport costs are high and cargo space is unavailable.

Ferrol tonic and Limacol are also in most West Indian stores and compete with similar products from Trinidad and Tobago. They are reportedly imported by La Preferida in the U.S. and distributed by Bedessee.

D. Major Competing Products

The following table highlights the official imports to Canada from selected Caribbean countries in 2001, in thousands of Canadian dollars:

Table V
Imports to Canada from Selected Countries, 2001

Country of Origin	C\$(000)
Guyana	209,474
Barbados	9,117
Jamaica	324,660
Trinidad and Tobago	195,141

Note that Guyana is second only to Jamaica from the West Indies. An important item from Guyana is fish fillets, frozen, 337,533 kilos for C\$938,000.

Fresh foods: In fresh foods, competing products come from other West Indian countries and to some extent from South and Central America. For example, the yams from Costa Rica are dried and waxed and are considered excellent. Tropical Trading says they sell about C\$600,000 per month in West Indian yams (not from Guyana), and that may be about 25 percent of the market.

In general, these countries are better organized for exporting and enjoy lower air freight costs and more availability.

Tropipak, for example, imports produce (long beans, bitter melon, lemon grass, etc.) and sells to A&P, VegPack and other supermarket chains. They do not import from Guyana. Tamisha Trading and Mossco Trading specialize in importing from Trinidad.

Root crops, specifically, are cheaper in Jamaica than in Guyana. Jamaica also has an advantage in shipping costs. The airlines reportedly charge by the container, no matter how much it weighs.

The same situation occurs with long beans from the Dominican Republic. It is difficult to win and hold a large share of the market against such competition.

Tropic Trading brings vegetables by boat from St. Vincent and Barbados to Toronto, through JFK airport by Air Canada or American Airlines. Their competitors include GS Tropical, Bernard Millington, and several small traders. They containerize in Barbados.

Processed foods: In processed foods there are three major kinds of competitors:

- Guyanese style foods produced in Canada (and other Canadian products such as fish and honey)
- Products from other West Indian countries
- Products from other countries such as India and China

For example the East and West Indian Grocery Store has a variety of products and brands. They include Guyana Pride, Brown Betty and Flavor Mate essences, mustard oil from the U.K., coconut oil from Bedessee, Brown Betty pepper sauce, Royal casareep, Mel's spices, Chinese sauce and pepper sauce, Guava and other juices from Rubicon in Canada, Sari hot sauce from Ricks & Sari, Achar from Bedessee, Maywah garam masala from Toronto, baby shrimp from Couantine fisheries in Guyana, salted fish from Canada, and Limacol and Ferrol tonic from Guyana. **IS THIS PARAGRAPH NECESSARY?**

Guyana Pride and Brown Betty products are packed in Canada by Bedessee, while Ricks hot sauce is made there by Exclusif Spices & Wholesalers.

Goudas Food Products has a large product line, but nothing from Guyana. They buy locally, pack, and import mainly from the West Indies and South American countries. They have coconut oil from Sri Lanka, Essences from Canada, among other products. A product list from Goudas is annexed to this report.

The only products unique to Guyana are casareep and a variety of thyme. Most casareep is imported in bulk and bottled in Toronto, and some people in Canada grow their own thyme. Guyanese style canned meat was never produced in Guyana. It now comes from Australia and Uruguay. Curry and similar products come from India, Pakistan and other countries.

The following is the product list of Tropipak Distributors Ltd.

Table VI
Product List of Tropipak Distributors Ltd.

Bitter melon	7 kg	Green mango	4 kg
Bitter melon	45 lb	Green mango	40 lb
Chayotes	6 kg	Hot peppers	3 kg
Chayotes	cs	Hot peppers	8 lb
Chilies	25 lb	Jalapeno	4 kg
Cooking bananas	cs	Lemon grass	3 kg
Dasheen	30 lb	Long beans	8 kg
Dasheen leaf	3 kg	Long beans	25/35 lb
Eddoes	7 kg	Long eggplant	7 kg
Eddoes	15-20 kg		
Ginger	5 kg	Long eggplant	35 lb
Ginger	30 lb	Long red chilies	3 kg
Green chilies	4 kg	Long squash	4 kg

Long squash	45 lb	Round eggplant	7 kg
Negro/white yam	30 lb	Snow peas	4 kg
Okra	8 kg	Sweet potatoes	7 kg
Okra	cs	Sweet potato	3 0/40 lb
Plantains	cs	Sweet yam	30 lb
Pumpkin	10 kg	Tamarind	4 kg
Pumpkin	20 lb	Thai chilies	3 kg
Pumpkin	40 lb	Yellow yam	30 lb
Pumpkin	50 lb	Yuca	45 lb
Red cocos	30/45 lb		

Annex D includes information about competing products and prices from several grocery stores in the Toronto area.

E. Other Products That Could Be Produced In/Exported From Guyana

The question of other potential produces was asked several times, but with few results. Some of the replies follow:

- Processed mangos, perhaps sun dried. At least one person, however, commented that processing the spice mangos would change their unique and natural flavor
- Dried, waxed yams such as those from Costa Rica
- Tropical fruit pulp, frozen or aseptically packed (interest expressed by ProPack)
- One person suggested coconut water, sugar cane juice, and perhaps a beverage made from oranges that now go to waste.
- Large aluminum cooking pots and other wooden and metal cooking utensils, i.e., rolling pins and spoons. Carib Impexco reported needing a supplier of the pots.
- Perhaps finished wooden items, such as incense holders or flooring of tropical hardwood.

F. Distribution Chains and Intermediaries

There are only a few companies that import substantial quantities of food products from Guyana. Information about them is presented in tables at the end of this section. They usually act as distributors and sell directly to retail stores and restaurants.

Interviews revealed that, in general, *importers from Guyana mark up 10-25 percent on their cost and retailers mark up 40 percent.* Markups are usually lower in supermarkets and for products that face hard competition.

Kiskadee is probably the largest importer from Guyana and the West Indies. They import fish, produce and dry goods and have seven delivery trucks.

Bedessee is a major importer in Toronto of Guyanese processed foods. He also has sales offices/warehouses in New York and Miami and ships to stores in other cities. Bedessee distributes about 1,000 items in Canada and 1,500 in the U.S.

Some Transportation Constraints Mentioned During Survey

Bedessee says ocean freight costs **C\$2800** for a 20 foot container from Guyana (compared to C\$1300 from Trinidad).

Ranamand Prakash reported that air freight from Georgetown to Toronto costs C\$1.35 per kilo. **Kiskadee** said it was \$1.26 compared to \$1.00-1.26 from Trinidad. He also mentioned the “red tape” associated with processing export documentation through Customs in Guyana. The process costs approximately G\$2,500.

A new airline, **Air Transat**, based in Montreal, flies to Guyana but does not pick up cargo. There is not enough freight going south to supply the airlines with steady payloads.

Bedessee also imports in bulk and packages, and produces “Guyanese style” items to his own specifications and with his own label. He has registered some trade names, such as “Brown Betty,” in Canada and sells to numerous stores and restaurants.

At least two persons interviewed had imported from Guyana but had stopped after the collapse of Guyana Airways.

There are numerous Guyanese and West Indian stores in the area (see Annexes D-F). Some importers hesitate to sell to these businesses on credit because they often go out of business. Most of the supermarkets also carry West Indian products, especially the lower price chains such as Food Basic and No Frills, which is owned by Loblaws.

G. Constraints to Exporting

The constraints that must be addressed to increase exports from Guyanese businesses to Toronto include: transportation (including cold storage), better manufacturing of products (i.e. higher quality), improved packaging and labeling techniques, as well as pricing and cost control.

Transportation: The main constraint, by far, is the lack of transportation. There is no cold storage room at the airport in Georgetown, Guyana, there are too few cargo planes, and the planes that go to Guyana do not accept containerized cargo. If the cargo is containerized in intermediate airports, it is put in LD3 type containers which are not for perishable items and are not ventilated. Once the cargo in these containers warms up, it is difficult to cool again. Shipping in baskets is acceptable, however, the airlines do not like them because of the increased need for handling.

Packaging and Labeling: Deficiencies in the packaging and labeling of Guyanese products were mentioned repeatedly during interviews. Specific examples include: using plastic bags and boxes that are too thin and easily damaged by water (the boxes are also too expensive)⁵, bottling items/products in used bottles, and inadequate label designs that do not meet Canadian legal requirements.

Product Quality and other relevant issues: For fresh produce, other constraints reported that adversely affect quality are harvesting at varying stages of maturity, using poor packing boxes, and delays in processing export documentation. Kiskadee reported that farmers sell long beans by the bundle, while he has to sell them by the pound (standardization is necessary). This makes it difficult for the importers to calculate prices. Also, some importers complained that farmers in Guyana raise their prices when they know a cargo plane will be leaving soon and that they do not honor contracts when the market price is above the contract price.

For processed foods, there are limitations of volume (which could give economies of scale), uncertain sanitation in the processing plants, a general lack of quality management systems, poor packing, cumbersome export procedures and expensive transportation.

Quality Issues Affecting Spice Mangos

Spice mangos are popular and the market can bear about 40,000 pounds per week. They are prized by consumers from Guyana, Jamaica and other West Indian countries. Unfortunately, many arrive in poor condition and virtually all have black spots which reduce their value. One importer thinks this is because they are picked too green and fungus develops during the ripening process. This is a problem that should be addressed in Guyana.

Regarding fish and shellfish, one person interviewed complained about quality control in the packing stations.

The following are some reactions to Guyanese sample products displayed during the interviews:

- The mustard oil sample looks like mostly coconut oil, with artificial mustard essence. Also it is lumpy (cakes up) and turns orange.
- Essence from Guyana costs four times as much as competing products.
- Coconut achar is 1/3 the price from Trinidad, and the sample has coconut oil in it.
- The coconut oil sample is not well refined. Also it was hot-filled in a plastic bottle and capped too soon. You should not hot-fill plastic bottles. It has to compete with good, cheap oil from the Philippines. He could import coconut oil in drums, but at the world market price.
- Jack's honey is not a full bottle, it is packaged in a used bottle, and may crystallize before it is sold. Local honey is cheaper, and Canada has a quota on imported honey.

⁵ One importer said that boxes cost \$0.25 in Canada and \$3.00 in Guyana. However, the boxes could not be shipped from Canada because of high customs duty (although Bedessee is reportedly doing this).

When Hindus buy honey for religious ceremonies, they don't care which country it comes from.

- The Chinese sauce seems to have casareep in it. Chinese sauce is very cheap from China.
- Guyanese are nostalgic about noodles, but those imported from Guyana are too expensive.
- Every country now has guava jam, notable Costa Rica and there is local production from imported pulp.
- Green seasoning is a Trinidadian product, and Trinidadians buy their own brands.
- Bedessee imports some noni juice and bottles it in Canada.

Red Tape: Exporters reportedly must visit several different offices to complete export documentation and pay a total of G\$2,500. Bedessee said that the CaribCom stamp had been missing for five years. Theoretically, a stamp is needed to enter goods free of duty under the terms of the agreement between Canada and the Caribbean Community.

One person said that processed foods were dated in Guyana with an eight month shelf life. Since they were more expensive and sold slowly, the expiration date sometimes passed before they could be sold.

Cost: The cost of Guyanese products is high. Bedessee estimated that a bottle of Honey might cost US\$2.50 in Guyana, and made calculations as follows:

$$\begin{aligned} & \$2.50 \times 12 = \text{US\$}30 \text{ per case} \\ & + \text{US\$}4 \text{ for shipping} = \text{US\$}34 \\ & \times 1.6 = \text{C\$}54.50 \\ & /12 = \text{C\$}4.53 \text{ each, assuming no customs duty.} \end{aligned}$$

Bedessee would have to sell this for C\$5.00 and the retailer for C\$5.99, while Canadian honey retails for C\$1.99.

To compound the problem, Guyanese exporters want to be paid in advance. If the importer pays and does not receive the goods, as promised, there is little that he/she can do.

Risk Factor: There is a perception that it is risky to buy from Guyanese companies because they often do not follow good sanitary procedures, do not carry product liability insurance, do not ship the same quality that was ordered (e.g. dilute the product).
NEGATIVE NEGATIVE

Corruption: There was some mention of the need to pay bribes to get export shipments cleared and to get air freight space. **NEGATIVE NEGATIVE**

H. Keys to a Successful Relationship

The interviews revealed frequent complaints that exporters in Guyana will not grant exclusive distributorships. This means that an importer of processed foods must spend time and money building up a product and brand that may then be sold by his/her competitors. The most successful processed foods from Guyana are probably Twins products, which seem to be imported and distributed by just one person.

It is important to offer an importer a specified quantity, quality and price and be able to maintain these over time. Some complained that samples were usually good but that quality degenerated in succeeding shipments, and that exporters raised their prices as soon as it looked like their products were in good demand.

Regarding payment, importers report that they usually have to pay in advance for products from Guyana but not for products from other sources. This obviously makes it relatively less attractive to buy from Guyana. Most fresh produce in world trade moves on a consignment basis and most processed foods on letter of credit or sight draft terms, with payment due 30 days after shipment or after arrival of the goods. Most countries help their exporters meeting these payment terms by offering export financing and export credit insurance.

I. Import Regulations

Fresh Produce

Most products of developing countries enter Canada free of duty, under its Generalized System of Preferences, and nearly all are free of duty from Guyana under the terms of an agreement between Canada and the Caribbean Common Market. However, there were some reports of paying for cargo inspection.

The Canadian Food Inspection Agency (CFIA) has no grade standards on mangos of any size or on other tropical products. They should, however, be clean and free of dirt and fungus and should not have excessive amounts of pesticide.

There are packaging and labeling requirements for boxes containing fruits and vegetables being imported into Canada. The following items must appear on the outside of the produce box/packaging:

- Common name of product
- Net weight and/or number of units per box
- Country of origin
- Name and address of a responsible party, i.e., exporter, importer or retailer.

In addition, the CFIA requires the following documents from the importer upon arrival of each shipment:

- Phytosanitary Certificate
- Confirmation of Sale

A Canadian import license for fresh product costs C\$1075 per year. Inspection of a container is charged at C\$800.

Processed Foods

Duty is charged on most processed foods from most countries. These charges are waived under an agreement between Canada and the Caribbean Common Market, and this gives Guyana an advantage over countries that do not receive this benefit.

For example, there is an 8.5 percent duty imposed on jams, fruit jellies, marmalades and fruit puree, whether or not they contain added sugar. Nectars made from pulpy fruits have duty of 11 percent or 7 percent if shipped directly to Canada with a Certificate of Origin. The duty on juices depends on the ingredient list, but if it is a single juice product (not combined with any other fruits) it is duty free. An Import Declaration Form is required for each shipment of processed foods.

Value-added products, such as bottled jam and juice, must be clean and free of dangerous bacteria. Also they must meet labeling requirements. Labels must be bilingual (French and English). At this time nutritional information on labels is not required, but is expected to be in another two to three years. United States nutritional declarations are not allowed on Canadian labels. Statements as "Healthy Choice" or "High in Vitamin C" must meet the standards as set out in "Canada's Guide to Healthy Eating," which says essentially that companies making these claims must be able to back them up with scientific evidence.

The label should show the product's ingredients and the name and location of the manufacturer or the importer. The bar code, or price lookup number (PLU) is not a requirement but is important if the item is to be retailed through supermarkets.

To ensure that Guyanese labels meet Canadian requirements, it is recommended that sample labels be sent to the Canadian Food Inspection Agency for review. The address of this government agency is:

Canadian Food Inspection Agency
401 Champagne Drive, Unit # 1
Downsview, Ontario
B3J 2C6
Attn. Andy MacPherson
Email: macphersona@inspection.gc.ca

For products entering the market for reprocessing as either aseptic or frozen, the only requirements are that the container must state the product's name, country of origin and container size.

Fresh and Frozen Fish

Fish do not have to come from a plant that is certified to HACCP, but this may change in the future. Producers in Guyana should begin working toward this certification.

There are no specific regulations except that the fish be free of micro-biological contaminants and in good condition. They must be accompanied by a phytosanitary certificate.

A Canadian import license for fish costs C\$500 per year.

J. Next Steps to Access the Market

To increase exports to Canada, the following sequence of actions is recommended:

- a. Hold meetings of Guyanese producers and exporters, with appropriate government officials, to discuss this report.
- b. Name a high-level private/public sector committee to set goals and prepare an export development strategy.
- c. This strategy may include changes in agricultural, industrial and commercial policy, improvements in infrastructure, improved relations between the public and private sectors, and export facilitation and incentives (not subsidies, which are illegal under the General Agreement of Tariffs and Trade - GATT).
- d. Overcoming the deficiencies and increasing exports will require a deep and sustained commitment by the Government of Guyana and the business community, with assistance by air and steamship lines and possibly international banks.
- e. There should be an association of exporters to work for their common interests, and an export financing and credit mechanism.
- f. When the country has exportable products and improved transportation, the Consulate in Toronto could consider organizing a country promotion activity that would include recipes, free samples, etc.
- g. Guyanese exporters need to take a longer view and understand that they may have to spend money for export development, including quality assurance systems, bar codes and promotion.

The owner of ProPack, Rumi Keshavjee, worked under contract with the export agency of Barbados to increase sales from that country in Canada and build from nothing to C\$1 million in three years. To do that for Guyana he would need a written agreement, a retainer of a few thousand dollars per month, better packaging and labeling, better filling, exclusivity, 90 day payment terms, and free products to use as samples. In return he would advise on packaging and labeling, promote the products at trade shows around Canada, etc. He fears, however, that the cost of raw materials, bottles, caps and transport would put Guyana at a disadvantage. **NEGATIVE – PARAGRAPH IS PROBABLY NOT NECESSARY.**

Annex A
Samples of Competing Products Obtained

SAMPLE	TO SHOW
Aunt May's Bajan Pepper Sauce	Complete label, tamper-proof lit
Aunt May's Jerk Seasoning	Superb label for the Toronto market
Bwa Bande Roots Drink	Caribbean health drink made in Canada
Cariherb Madras Curry Powder	Competing product from Trinidad
CEC Double Concentrate Tomato Paste	Gourmet food and its packaging
Chief Fish Seasoning	Nice package, competitor from Trinidad
Chief Roasted Geera	Competing product from Trinidad
Eden Herbs Caribbean Noni Drink	Competition for Noni beverage
Golden Arrow Head Guyana Style Massala	Poor packaging, non-conforming label, using Guyana name to sell local product
Goya Guava Jelly	Competitor in the jelly market
Goya Honey	Competition for the honey market
Grace Crushed Pepper Sauce	High quality product and label
Indra Sweet Almond Oil	Guyanese style product, packed in NY
Jamaica Kitchen Plantain Porridge Mix	Potential new product for Guyana
Karibbean Flavours Almond Essence	Attractive essence from Trinidad
Lannaman's Ginger Logs	Competing product made in USA
Maywah Garam Massala	Good bag and label, packed in Canada
Mr. Goudas Ginger Beer	Superb label, plastic bottle, Canada
Nestle Peanut Punch (package only)	Competitor in peanut punch, Trinidad
Solo Pear Drink	Bottled beverage from Trinidad
Sue's Catering Coconut Fudge	Potential new product for Guyana
Superb Blend Spicy Mango Chutney	Unique jar, tamper proof lid
Tamarino Tamarind Paste	Thick bag, nice label from Thailand
Turban Ground Massala	Competing product from Trinidad
Walkerswood Caribbean Savory Sauce	Superb label from Jamaica

Also provided numerous Guyanese and West Indian newspapers from New York and Toronto and a sample of a high quality box for shipping produce.

ANNEX B
Directory of Associations, Importers, and Businesses Identified in the New York City Area

Associations, Importers & Businesses Identified in New York City area during Survey			
Business Name	Owner/Manager/ Primary Contact	Address	Contact Information
A Farmboy Market		127-20 Rockaway Blvd., South Ozone Park	(718) 738-3750
A&J Food Wholesalers Inc.		Brooklyn Terminal Market, Space 25	
A.J. Shipping		Richmond Hill, Queens, NY	
Annjee's		123-06 Liberty Ave. Queens, NY	(718) 641-5221
Associated Food Stores		134-16 Liberty Avenue, Queens, NY	(718) 658-8817
Bacchus West Indian Market	Rahman Bacchus	1190 Rogers Ave., Brooklyn, NY	(718) 462-5019
Bedessee Imports Inc.	Chubbie Bedessee	601 Wortman Ave., Brooklyn, NY 11208	(718) 272-1300
Big Market	Babjie	4362 White Plains Rd., Bronx, NY	(718) 325-0999
Caribbean Cargo & Packaging Services	Sudarshan Singh	John F. Kennedy Airport	(718) 441-2900 singh75@aol.com
Church Fruit Market	Mrs. Lee	4724 Church Street	
Dave West Indian Products Corp.	Archie	98-07 97 th Ave., Ozona Park, Queens, NY 11416	(718) 323-1200
Eagle Shipping	Sidney Ross		(718) 434-8375
Global Tropical Company	Harvey	Brooklyn Terminal Market	
Guyana Businessmen's Association	Basil Persaud	123-15 Liberty Ave., Richmond Hill, NY 11419	(718) 843-7382
Guyana West Indian Grocery		123 rd & Liberty Ave., Richmond Hill, NY	
H. West Indian Stores	Soyla	128-20 Rockaway Blvd., Queens	
Hunt's Point Market Juniors Produce	Leo	Space 438, Brooklyn	(718) 991-7300
Hunt's Point Market Top Banana		Space 413, Brooklyn	(718) 328-6700
Hunt's Point Market D'Arrigo Brothers		Space 323, Brooklyn	(718) 991-5900
Hunt's Point Market Korean Farm Corp.		Space 353, Brooklyn	(718) 842-3300
Hunt's Point Market J&J Produce	Leo	Space 257, Brooklyn	(718) 589-8444
Hunt's Point Market International Tropical Foods		Space 160, Brooklyn	(718) 585-3775
Indian Spice World	Karim	2337 Grand Concourse, Bronx, NY 10468	(718) 733-4883
J&B West Indian and American Grocery	Andrew	124 th & Liberty Ave.	(718) 845-1280
J&N West Indian Grocery		173-23 Jamaica Ave	(718) 658-5789
Key Foods		8725 Lefferts Blvd., Richmond Hill	

Laparkan Office (HQ)		3335 Washington Ave., Irvington, NJ 07111	(973) 399-0777
Business Name	Owner/Manager/ Primary Contact	Address	Contact Information
Laparkan Office (branch)		261 1 st St., Mount Vernon, NY	(718) 325-4987
Laparkan Office (branch)		3539 White Plains Rd., Bronx, NY	(718) 653-5899
Laparkan Office (branch)		19107 Jamaica Ave., Queens, NY	(718) 736-1090
Laparkan Office (branch)		130-08 101 st Ave., Queens, NY	(718) 847-6939
Laparkan Office (branch)		2850 Linden Blvd., Brooklyn, NY	(718) 227-7357
Laparkan Office (branch)		3407 Church St., Brooklyn, NY	(718) 287-7777
Laparkan Office (branch)		606 Nostrand Ave., Brooklyn, NY	(718) 493-7118
R&A Islamic Enterprises Inc.	Rafeik	128-22 Rockaway Blvd. Queens, NY	(718) 845-8185
Ramela International	Joseph	135 Liberty St.	(718) 262-9505
Spice World Stores, Inc.	Tony Yassin Lal Somwaru Lucy	123-21 Liberty Ave., Richmond Hill, Queens, NY	(718) 529-3000 (718) 845-1503
Spice World Stores, Inc. (branch)		168-37 Hillside Ave., Queens	
Spice World Stores, Inc. (branch)		2337 Grand Concourse, Bronx	
Spice World Stores, Inc. (branch)		3294 Fulton St., Brooklyn	
T&C Tropical Products	Tony Jr.	Brooklyn Terminal Market, Space 17	(718) 536-5888
Terminal Produce Corporation	Hak Chin Kim	Brooklyn Terminal Market, Space 4	(718) 251-1842
World Spice Discount Center		4404 White Plains Rd, Bronx, NY	(718) 994-6413

ANNEX C
General Information about Distributors Serving the New York City Area

Distributors Serving the New York City Area			
Name	Address	Contact Information	Comments
Bedessee Imports Inc.	601 Wortman Ave., Brooklyn	Chubbie Bedessee (718) 272-1300; (888) 233-3773	This firm is affiliated with Bedessee Imports Limited in Toronto. The U.S. company also has an office in Miami, and the Canadian company also has an office in Montreal. Bedessee's major product from Guyana is frozen fish. They buy casareep and pepper sauce in bulk and package it themselves.
Charles Kenneth Imports	Bronx Terminal Market	Charles Kenneth (718) 665-8991	Currently importing little from Guyana – building up Asia now and may turn to the Caribbean later. 85% of what they handle is processed foods.
Dave West Indian Products Corporation	98-07 97 th Ave., Ozona Park, Queens, NY 11416	Archie (718) 323-1200	The owner is Guyanese. He has a large line of fish and processed foods including Champion and Brown Betty chow mien from Guyana, Indi curry, mango achar, fish, etc. He says that he represents Indi and Beharry and that no one else can sell their products in New York. Other persons said this was not true.
Indo-West Indian Trading Company	Queens	(718) 526-5052	Reported that they are not importing from Guyana. Their products are made in the U.S.
Kwak's Imports	1360 Lafayette Ave. Bronx, NY	(718) 589-0504	Mr. Kwak said by telephone that importing from Guyana was difficult because of limited transportation, but he refused to elaborate.
La Preferida	Chicago Based	(800) 621-5422	Imports the products of Guyana Pharmaceutical and distributes them in the New York area.
M. Hanif	Queens	(718) 468-6589	Owner and his wife bring "Twins" products and other items from Guyana and distribute them to selected stores.
Ramela International	Richmond Hills, Queens	(718) 262-9305	Currently not importing from Guyana. They buy Guyanese products from Bedessee and Dave and import processed foods from Trinidad and other countries.
Spice World Stores Inc.	Four stores 123-21 Liberty Avenue, Richmond Hill; 3294 Fulton St., Brooklyn; 2337 Grand Concourse, Bronx; 168-37 Hillside Ave, XX		Owner: Tony Yancin. Owns Guyana Stores in Georgetown. U.S. stores sell almost nothing made in Guyana except for weri weri peppers, flags, and CDs. Stores have mortar and pestles from the Dominican Republic, but little other cookware and no handicrafts

T&C Tropical Products	Brooklyn TerminalMarket	(718) 763-5888	They are buying pumpkin, peppers, thyme, etc. from importers. Say that the supply from Guyana is irregular.
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ANNEX D
What is Available in Stores in the Toronto Area?

Dominion Supermarket, at 16 William Kitchen Road in Scarborough:

- Eddoes, C\$1.29 per pound
- Green mangos from Dominican Republic, C\$2.30/lb.
- Lemon grass, Dominican Republic, C\$1.68 for small package
- Long beans from Dominican Republic, C\$1.94/lb.
- Mangos from Peru
- Sweet potatoes from Jamaica, C\$2.99/lb.
- Brown sauces, many, mostly from Asia
- Busha Brown sauces from Jamaica – pepper sherry, jerk, hot pepper
- Cumin seed etc. from McCormick of Canada
- Del Valle guava nectar, Mexico, 355 ml can
- Honey, 3-4 brands, all from Canada
- Hot sauces, many, from Barbados, Jamaica, Trinidad, others
- Jams and jellies, many from various countries
- Spritzer Jamaica lemonade, C\$0.99 for 12 oz. can.

No Frills Supermarket, at McCowan Road and Milner Avenue in Scarborough. No Guyanese or West Indies section in this store.

- Eddoes from Brazil, C\$0.77 per pound.
- Grace guava jam from Jamaica, C\$2.27 for 340 grams
- Ground coffee, vacuum packed, C\$2.27 for 300 grams.
- Hot chili sauce from Singapore, C\$1.97 for 375 ml
- Matouk hot pepper sauce from Trinidad, C\$2.47 for 300 ml.
- Norman Sue noodles from Canada, C\$0.77 for 312 grams
- Suroj garam massala, India, C\$2.27 for 400 grams
- Tiger Malta, Canada, C\$0.67 per 12 ounce (341 ml) bottle
- Pink salmon, frozen, C\$1.49 per pound.

Price Chopper Supermarket, at Finch and Jane streets in Toronto:

- Bitter melon, C\$2.47/lb.
- Long eggplant, C\$1.99/lb.
- Long beans from Canada, C\$1.99 per pound
- Okra, C\$3.49/lb
- Pumpkin, Jamaica, C\$1.29/lb.
- Mr. Gouda's guava jam, C\$2.99 for 500 grams (375 ml)
- Mr. Gouda's mixed essences, C\$1.79/150 ml
- Brown Betty chow mien noodles, C\$0.89 for 340 grams

- Various products from Irie Foods.

RC West Indian Grocery and Takeout, at 1872 Kennedy Road in Scarborough. The owner of the store is from Jamaica.

- Frozen callaloo from Trinidad/Tobago
- Guyanese spice mango (in season)
- Betty Brown pasta from Canada
- Essences from Toronto
- Honey from Canada, sauces mostly from Jamaica
- Malta from Jamaica
- Ginger beer from Grace Kennedy in Jamaica.

Lillies Tropical Foods, at 200 Markham Road in Scarborough. This store specializes in fresh and frozen fish. The owners used to import from Guyana, but stopped because it was too hard to find air cargo space.

- Long beans, spice mangos and spinach from Guyana
- Guyanese Pride noodles from Bedessee
- Champion noodles, and others from Trinidad/Tobago
- Brown Betty noodles and essences from Canada
- Hot sauces from Trinidad/Tobago and others
- Chana, chick peas etc. from Canada
- Indian products from India and Canada.

M&S West Indian Supermarket, on Jane Street. The Guyanese owners have an excellent assortment of products from several countries, these include:

- Brown Betty jam
- Flavor Mate essences from Guyana
- Frozen fish from Guyana
- Guyana Pride noodles
- Guyana Pride, Brown Betty and Geeta casareep
- Tamarind balls from Thailand and the Philippines.

East and West Indian Grocery. The store has mainly fresh and processed vegetables, fish and meat.

- Fish and fresh vegetables from Guyana, especially long beans, seim and weri pepper
- Achar from Bedessee
- Brown Betty pepper sauce from Toronto

- Chinese sauce and pepper sauce
- Coconut oil from Bedessee.
- Guava and other juices from Rubicon on Canada
- Guyana Pride (from Bedessee), Brown Betty and Flavor Mate essences (Flavor Mate at C\$2.59)
- Maywah garam masala from Toronto
- Mel's spices
- Mustard oil from the UK
- Royal casareep from Guyana
- Sari hot sauce from Ricks & Sari
- Baby shrimp from Couantine fisheries in Guyana
- Salted fish from Canada
- Limacol and Ferrol tonic.

Linstead Market in Scarborough is Jamaican-owned and has some Guyanese customers. Their stock includes Ferrol compound, 5 ounces for C\$6.99, and Limacol.

A small supermarket, **Spiceland**, owned by a Sri Lanka, had excellent cassava chips made in Canada.

ANNEX E
Companies in Toronto that Import from Guyana⁶

Company name	Bedessee Imports Ltd.
Contact name and position	Rayman Bedessee, CEO
Phone, fax, email	Phone 416-292-2400, fax 292-2943, rayman@bedessee.com
How long in operation	Started 1950 in Guyana, 1972 in Waterloo, Ontario
Range of products	Wide range of West Indian products
Current sources of products similar to those proposed	Buys from Guyana and various other countries, and packages in Canada
Comments	Has office/warehouse in NY and Miami and ships to stores in several Canadian and U.S. cities. Does fishing and fish processing in Surinam

Company name	Carib Impexco Import and Export
Contact name and position	George Prasad
Phone, fax, email	Phone 291-4189, fax, impexco@idirect.com
How long in operation	12 years, volume C\$6 million
Range of products	Imports selected products from several countries; full range of products in retail stores
Current sources of products similar to those proposed	Also operates two stores.

Company name	Twins Trading Enterprise
Contact name and position	Ms. Raziq L. Khan
Phone, fax, email	416-494-9379, fax 416-492-5364
How long in operation	
Range of products	Imports and distributes Twins essences
Current sources of products similar to those proposed	Has excellent distribution throughout Toronto.

⁶ Some of these distributors are also included in Annex F

Company name	Kiskadee Ventures Ltd.
Contact name and position	Latchman Narine
Phone, fax, email	416-285-1373, fax 416-285-7013
How long in operation	10 years
Range of products	Fresh, frozen and dry products
Current sources of products similar to those proposed	Guyana and other West Indian countries

Company name	Abdul Hakeek
Contact name and position	Abdul Hakeek
Phone, fax, email	Home 416-282-5519, fax 282-3011, pager 714-9992
How long in operation	5 years
Range of products	Fresh fruits and vegetables, frozen fish
Current sources of products similar to those proposed	Imports from Guyana and distributes mainly to Guyanese-owned stores

Company name	H.P. Tropical
Contact name and position	Mohan Passad, Owner
Phone, fax, email	905-294-9970
How long in operation	8 years
Range of products	Fresh and frozen fish and shrimp
Current sources of products similar to those proposed	Buys only from Guyana

Company name	Krish Synanon
Contact name and position	Krish Synanon
Phone, fax, email	416-992-5776
How long in operation	12 years
Range of products	Fresh produce, looking into fish
Current sources of products similar to those proposed	Imports from Guyana

ANNEX F
Directory of Associations, Importers, Businesses, Individuals, and Information Sources Identified in the Toronto Area

Associations, Importers, Businesses, Individuals, & Information Sources Identified in Toronto area during Survey			
Business Name	Owner/Manager/Primary Contact	Address	Contact Information
Apcan Multi Food		1760 Victoria Park Avenue Scardsdale (south of Lawrence)	(416) 765-2385
Association of Concerned Guyanese	Krishna Persaud		(416) 483-4952
B.K. Sethi Marketing Ltd.	B.K. Sethi	25 Grand Marshall Drive Scarborough M1B 5N6	(416) 299-5741; (800) 667-0727; fax (416) 299-6706; bksethimarketing@rogers.com
The Banana Store		2732 Jane Street	
Bedessee Imports Ltd.	Raymond Bedessee	2350 Midland Ave. Toronto M1S 1P8	(416) 292-2400 CEL (416) 817-2388; fax (416) 292-2943
Best Buy West Indian Store		2400 Eglinton East	(416) 755-2017
Carib Impexco Inc	George M. Persaud Vernan Persaud	5818 Sheppard Avenue (east of Scarborough) & 1174 Albion Road (at Islington)	www.caribimpexco.com ; impexco@direct.com ; (416) 291-4189; (416) 748-9822
Caribbean and Oriental Specialty Mart		1170 Morningside Road	(416) 284-9457
Caribbean Foods		3322 Keele Street	(416) 633-9268
Caribbean Islands Food Market		3432 Weston Road (south of Finch)	(416) 746-1592
Charley's West Indian Foods Ltd.	Satchinen Budhu	Malvern Market Place Plaza 1154 Morningside Ave. Scarborough	(416) 283-1441
Charley's West Indian Foods (branch)		3057 Hurontario Street Mississauga	(905) 896-3683
Charley's West Indian Foods (branch)		1646 Victoria Park North Eglinton	(416) 959-7680
Consulate of Guyana	Danny T. Doobay Consul General	505 Consumers Road Suite 206 Willowdale M2J 4V8	(416) 494-6040; FAX (416) 494-1530
City of Toronto Urban Affairs Library		Metro Hall King and John Streets	(416) 297-7241
Danforth Food Market		3701 Keele Street	(416) 398-8123
Danforth Food Market		301 Silverston Drive	(416) 740-9870
Danforth Food Market		651 Markham Road	(416) 439-6397
Danforth Market		2742 Danforth Avenue Toronto	(416) 690-5579
Darshan, Luckhoo		3067 Lafontaine Road	(905) 676-1702;

		Mississauga	fax (905) 676-1742
Business Name	Owner/Manager/ Primary Contact	Address	Contact Information
East & West Indian Grocery	Jackie and Rafiq	1824 Jane Street	(416) 243-9473
East & West Indian Grocery		2002 Middlefield Road Unit 8, Markham	(905) 471-8051
East End Tropical Market		4520 Kingston	(416) 286-0516
El Dorado Jewelry Inc.	Kevin S. Baksh	Scarborough Trade Center C-17	(416) 676-3448
Fisher's Tropical Foods		1565 Eglinton	(416) 785-1720
Frida Craft Stores	Susan Bellan	39 Front Street East	(416) 366-3169
Friends of Guyana	Godfrey Bereford	Scarborough	(905) 297-9653
G&P Caribbean Specialty Foods		1708 Jane Street	(416) 243-2764
Geeta Foods			(416) 299-7793
Gooda's food Products and Investments Ltd.	Panos Gouda	241 Snidercross Road Concord	(905) 660-7628
Greenlands Convenience Store		5318 Finch Avenue East No. 7 and 8 Scarborough	(416) 609-3333
Guss Tropical Foods		1582 Eglinton	
Guyana Canada Association	Bhoj Secharan	Woodbridge	
Guyana Hometown Association	Mary Tucker Clifton Aaron Fred McCalmont		(416) 431-0065 (416) 538-2243 (416) 754-0073
Guyana Toronto Connection	Esther Dias	Brampton	(905) 792-2010
H.P. Tropical	Mohan Passad		(905) 294-9970
Hakeek, Abdul		746 Morrish Road Toronto	(416) 282-5519 Page: (416) 714-9992
Homeland West Indian Meat and Fish		Jane Street	(416) 244-4049
India Africa Grocers		2121 Jane Street	(416) 241-5435
India Africa Grocers		40 Revdale Boulevard	(416) 748-5720
Jane Food Store		1794 Jane Street	(416) 241-7486
Jane Mini Mart		1784 Jane Street Toronto, Ontario M9M 2T2	(416) 248-0470
Joyce's West Indian Food Store		854 Bathurst Street	(416) 533-4872
Kiskadee Ventures Ltd.	Latchman Narine		(416) 285-1373
Laparkan Trading			(416) 292-4370
Lillies Tropical Foods		202 Markham Road Scarborough	(416) 265-8196
Linstead Market		4561 Sheppard Avenue East Scarborough M1S 1V3	(416) 292-1053
Loblaws Supermarkets	Beverly Wright		(416) 218-7734 bwright@ngco.com
M&S West Indian Supermarket	Abdool or Shameeza	200 Markham Road Scarborough	(416) 261-1226
Mercy Tropical Foods		1129 Saint Clair Avenue West	(416) 658-8727
Navain Robin (distributor for Royal and Champion)			(416) 742-0303

Business Name	Owner/Manager/ Primary Contact	Address	Contact Information
Nicey's Food Mart		60 Morecombe Gate (off Victoria Park, north of Finch)	(416) 497-9717
Nicey's Food Mart		107 Kennedy Road South (south of Clarence, Brampton)	(905) 450-6045
Nicey's Food Mart		325 Central Parkway (west at Confederation), Mississauga	(905) 270-4417
Nicey's Food Mart		621 Vaughn Road (at Oakwood)	(905) 656-6648
Nicey's Food Mart		1794 Liverpool Road (south of Highway 2), Pickering	(905) 837-9228
Nicey's Food Mart		1294 Finch Avenue West (east of Keele at Tangiers)	(416) 739-7512
Pan Global Cargo Express			(905) 677-6060
Prak's Cuisine		752 Markham Road Scarborough	(416) 289-7310
RC West Indian Grocery & Take Out	Ramanand Prashad	1872 Kennedy Road Scarborough	(416) 293-4619
Rayman's West Indian Variety Store		940 Gerrard Street East (west of Pape)	(416) 463-0469
Ray's Tropical Foods		1640 Jane Street	(416) 248-9690
Region 3 Guyana Association			(416) 665-9442; region3guyana@yahoo.com , www.geocities.com/region3guyana/recontact.html
Spiceland Supermarket		5790 Sheppard Avenue	(416) 292-0086
Statistics Canada	Harold Kim	25 St. Clair Avenue East 10 th floor Toronto M4T 1M4	(416) 954-3842; fax (416) 973-7475; harold.kim@statcan.ca
Sugar & Spice Bulk Foods		1574 Eglinton	(416) 785-6055
Tropic Trading Inc.	Alan White	150 Millner Avenue Scarborough Ontario M1S 3R3	(416) 293-5751; fax (416) 293-3940
Tropical Treet	Rumi Keshavjee	130 Bermonsey Road Toronto	(416) 759-8777; fax (416) 759-7782; info@tropicaltreetsw.com
Tropipak Distributors Ontario	Joseph Balkowski	1235 Mi-Way Blvd. Mississauga, Ontario L5T 2C1	(905) 696-8266; fax (905) 696-8877; tropipak@tropipak.com
Tropical Food King		Oakwood/Eglinton	
West Indian and African Home Food		547 Rogers Road	(416) 658-5383
West Indian Fine Foods		3601 Lawrence Avenue East Terrace Brae Plaza Scarborough	(416) 431-9353
West Indian Food Mart	Alan and Bebi	1660 Kingston Road	(905) 686-2584

	Spencer	Unit 8 Pickering	
West Indian Food Store		1804 Eglinton Avenue West	(416) 787-8069

ANNEX G
Information Sources of Interest – Toronto

Guyana Current, 1265 Morningside Avenue, Suite 109, Scarsdale, 905-565-0077, acgtoronto@hotmail.com

Graphic News, Markham, 905-426-3715, graphicnews@rogers.com (mainly Guyanese)

Imprint, I-Media Group Inc., 416-396-4660, editor@imediagroup.ca (Moslem)

Indo Caribbean World, 905-738-5005, icworld@rogers.com (West Indian)

Inter Caribbean News, 416-498-8866

Pride, 416-335-1719 (Guyanese)

Share, 416-656-3400 (Jamaican +)

The Caribbean Camera, 416-412-2905, caribbeancamra@aol.com (West Indies)

Annex H

Article on Steamship Lines in the Caribbean

Specialists and global carriers look for synergies

Vessel sharing, space charters, consolidation playing ever-larger role in Caribbean

By Jim Dow

December 3, 2001

In August, Seaboard Marine completed an agreement to charter space to Mediterranean Shipping Co. (MSC) on three of its services to the Caribbean and the North Coast of South America. The services all depart from Seaboard's South Florida hub at the Port of Miami, and include connections at MSC's hub in Freeport, Bahamas, where it transfers cargo between its North America, South America, and European services.

On October 1, Tropical Shipping reached an agreement to acquire the liner division of Kent Line, a Canada-based carrier that specialized in the Caribbean and Latin America trades.

Those two deals speak volumes about the Caribbean trade, where cooperation between carriers and market consolidation continue to shape the market for ocean shipping services.

Many of the working relationships involve agreements between the Florida-based Caribbean specialists that are container volume leaders and who offer service to the most destinations, and multi-trade, global carriers who use the Caribbean as an exchange point for intercontinental services.

Where "small" is big

The Caribbean is a trade where carriers that would seem small on a global scale dominate the market, and where global giants often ride the backs of niche specialists. The one exception is Maersk Sealand, which has combined the established markets of Sea-Land Service to the Dominican Republic with parent company A.P. Moller's ambitious visions for the Caribbean and Latin America.

Maersk Sealand, which represents one of the ultimate examples of industry consolidation, has been involved in vessel sharing as well, although to a limited degree. It operates some of its Caribbean services in conjunction with the Cagema services of France's CMA-CGM.

Tropical Shipping, which operates most of its services out of the Port of Palm Beach, Fla., is the single largest container carrier in the trade. Tropical offers direct service to more than 25 islands in the Caribbean, and has two or more departures a week to its busiest destination.

Tropical is also actively involved in the market for less-than-container load (LCL) consolidations, giving it the unique distinction of being a statistical leader as both a steamship line and as a non-vessel-operation common carrier (NVOCC).

It has followed a course of growth through acquisitions of specialty carriers, including not only the Kent Line deal this year, but specialty carriers like Thompson Shipping--which retains its brand name--and sails exclusively to the Cayman Islands.

Seaboard, the single largest carrier at the Port of Miami, is also a market leader because of its wide array of services. It has individual services to the Dominican Republic, Jamaica, Haiti, the Cayman Islands, and daily service to the Bahamas.

It also has a separate service to the Caribbean destinations of Antigua, Barbados, Trinidad, Jamaica, and the South American port of Georgetown, Guyana.

Crowley Liner Services (CLS), as a U.S.-flag carrier, is eligible to participate in the domestic trade service to Puerto Rico. But unlike other carriers in that market, CLS is also active in other Caribbean markets. It has extensive services to key hubs like Jamaica and the Dominican Republic, and markets services to smaller islands, as well.

CLS has become a niche operator in the Caribbean and Central America since its parent company, Crowley Maritime Corp., sold its extensive South American services to Germany's Hamburg Sud group. That sale also gave Hamburg Sud the rights to the brand name Crowley American Transport, or CAT. That required Crowley Maritime to change the name of its existing Caribbean services to CLS.

Although CAT is primarily a South American carrier, it, too, offers some service to the Caribbean islands en route to the North Coast of South America. CAT calls Aruba and Curacao on its southbound service to Venezuela.

Another Caribbean specialist that is among the larger players in the trade is Tecmarine Line. Based in Florida, it sets itself apart by offering direct services from the North Atlantic in addition to its primary Florida departures.

Tecmarine offers a weekly all-water service from Gloucester City, N.J., near Philadelphia on the Delaware River, to Haiti, Jamaica, and the Dominican Republic. That service also makes a call at Fernandina Beach, Fla., near the Florida/Georgia border, en route to the Caribbean.

But Tecmarine's services also include weekly departures from Port Everglades, Fla. (at Fort Lauderdale) to 20 destination in the Eastern Caribbean, and a weekly service from Port Everglades to Jamaica, Haiti, and the Dominican Republic.

Smaller niche carriers

Although carriers like Tropical Shipping and Seaboard Marine would be considered niche carriers on global shipping markets, the Caribbean trade also has several other carriers that serve specific parts of the Caribbean, as opposed to the multi-island services of the market leaders.

Carriers like Navieras NPR, King Ocean, Thompson Shipping, and Bernuth Lines are fairly large carriers in the Caribbean trades, but specialize in a limited number of destinations.

Navieras, like Crowley Liner Services, is a Puerto Rico trade carrier. King Ocean does most of its business in the Venezuela trade, but offers service to the countries the Netherlands Antilles and Trinidad & Tobago on the way to the North Coast of South America.

Thompson, the division of Tropical, focuses on the Cayman Islands. Bernuth Lines, which operates from a terminal on the Miami River, is somewhat more diversified. The Dominican Republic is one of its large markets, but Bernuth has a multi-island service to the Eastern Caribbean that offers a combination of weekly and bi-weekly calls.

Growing hubs

Hub ports and transshipments have always been an important part of the Caribbean trades. Many destinations simply do not attract the volumes to justify direct, main line services. That means the larger vessels are used to call hub ports, handing off containers to various feeder services from those islands.

The hubs have become increasingly sophisticated in recent years. Freeport, Bahamas has developed into a load center port for global carriers like MSC.

Kingston, Jamaica is another key transshipment port, counting Israel-based Zim as one of its largest customers. Zim hands off shipments from its east-west services that extend from the Mediterranean to Asia, and from its north-south service between the U.S. East Coast and the East Coast of South America. Zim also offers a service from Houston to Kingston that provides connections to both of those services from the Gulf, with Caribbean island cargoes thrown into the mix.

More hubs are in development. CSX World Terminals is building a new hub port in the Dominican Republic, and the government of Puerto Rico is expected to start work next year on a transshipment center near Ponce, the island from San Juan.

Because of the many options and destination, the Caribbean remains a crowded trade, in spite of the ongoing forces of consolidation. More and more national and northern-based NVOCCs are becoming active in the trade, joining the established Florida-based operations like Econocaribe, Lilly & Associates, and Universal Freightways.

Flat volumes for some destinations have put a squeeze on the steamship lines, but services to other markets are growing as a result of Caribbean parity legislation that was passed last year. But as a crucial crossroads of world trade, the Caribbean can always attract a variety of niche and global operators, who now more than ever are seeing the benefits of combining their respective strengths.