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EXPORT MARKET OPPORTUNITIES

MARKET PROFILE:

ST. LUCIA

A RAPID RECONNAISSANCE SURVEY



Export Market Series: Bulletin No. 6

February 2003

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Ministry of Fisheries, Crops and Livestock
Guyana Office for Investment
New Guyana Marketing Corporation

Export Market Series Bulletin No. 6

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With the assistance of the United States Agency for International Development

Preface

This publication marks the beginning of a series of market bulletins which seek to provide relevant and timely information about markets and product potential for producers and exporters of non-traditional commodities. Although Guyana depends largely on its traditional exports of rice and sugar; minerals such as gold, bauxite and diamonds; and timber, most small and medium firms focus on sectors such as fresh produce, agro-processing, fish and seafood, and value added wood products, among others. The first bulletins in this series are not market studies in the true sense, but instead they are rapid reconnaissance surveys of the export potential for various Guyanese non-traditional exports in a variety of markets. The purpose is first, to identify the level of demand for non-traditional export products currently produced in Guyana and ascertain whether these products are produced locally or are imported. A second objective is to determine what, if any, is the level of market penetration of Guyanese products. Thirdly, the surveys attempt to capture the preferred characteristics of the different products in each market, and at the same time, to assess the success or failure of Guyanese exporters in meeting this market demand. Where available, prices for the different commodities are provided, if only for a specific point in time. Finally, useful contacts are provided where exporters may obtain additional information on the various commodities, market prices, import and custom requirements, etc. in the importing country. Producers and exporters who are interested in obtaining additional information about the demand for their products in overseas markets are urged to contact either the Ministry, Go-Invest or NGMC. In many instances these agencies may be able to put exporters in direct contact with potential buyers, wholesalers and retailers in the importing countries.

The undertaking of these market surveys also serves to reaffirm the collaboration among the Ministry of Fisheries, Crops and Livestock; Go-Invest and the New Guyana Marketing Corporation (NGMC) in improving quality, increasing production and promoting exports. As a team, the three agencies are working on the problems, limitations, and constraints identified in the surveys, from production and post harvest handling problems, to packaging and transportation, to final market access.

Go-Invest and NGMC maintain a list for many countries of importers, wholesalers and distributors of fresh and processed fruits and vegetables, lumber and wood products and fish and seafood. For more information, contact us at:

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ST. LUCIA

BACKGROUND NOTES

St. Lucia, one of the Windward Islands, is found in between the Caribbean Sea and Atlantic Ocean at 13° 53' N and 60° 68' W. The island has a total landmass of 610 km, which is roughly 3.5 times the size of Washington, DC. St. Lucia is of volcanic origin and continues to experience some volcanic activity. The island is mountainous with broad, fertile valleys. Two outstanding landmarks of St. Lucia are the cone-shaped peaks called the Gros and Petit Pitons, which are located on the western coastline in the south, between Soufrière and Choiseul. In the central and south parts of the island the mountains have good forest cover, but there are areas on the north end of the island that are reported to be somewhat deforested. The climate is tropical but pleasant when the northeast trade winds blow. The dry season is January to April and the rainy season from May to August. (www.cia.gov).

The island has an estimated permanent population of 156,635 (2001). The ethnic mix is 90% black, 6% mixed, 3% East Indian and 1% white. Castries, the capital city, has a population of around 50,000 which is a population density of around 5,102 persons/sq. km., making it the most highly populated urban center in the country. The other large city is Vieux Fort, which has a population density of 2,152 persons/sq. km.

Approximately 72% of households have a car. The quality of the service offered by the public transportation system is poor, but it is functional (St. Lucia Demography Service, 2001). Taxis appear to be abundant in the tourist zone and small buses work routes between urban areas and areas where tourists congregate. Bus service is somewhat erratic.

According to Mr. Ronald Ramjattan, a Guyanese immigrant engaged in the food processing industry in St. Lucia, an estimated 5,000-8,000 Guyanese live in St. Lucia. Guyanese immigrants are well-dispersed throughout the community and the island, engaged in a variety of business enterprises, professions, crafts and trades.

The major language is English but most islanders speak French patois as well. This phenomenon is a reminder of its colonial history. The French and English fought frequently over control of the island, with the result that St. Lucia changed possession frequently, some 14 times, until it was finally ceded to Great Britain in 1814. St. Lucia has been independent since 1979.

St. Lucia has a Westminster-style parliamentary democracy.

ECONOMIC OUTLOOK

Important Statistical Information about St. Lucia.

Total population in 2001:	156,635
Inflation rate in 2000:	2.5%
Average income/capita:	US \$7,017
GDP for 2001:	1,099.03 million EC\$
Average GDP/capita:	US \$4,500

Tourism is an important component of the economy of St. Lucia because of its impact on the services and retail sectors. The tourist season begins in November and continues until March or April. During this period, the population of the island swells greatly, increasing demand for lodging, meals, imported foods and luxury items. The hotel and restaurant trade contributed over 16.4% to the GDP in 2000.

Stay-over tourists tend to congregate at the north-end of the island in the Castries-Rodney Bay area and in Soufrière, depending on whether they are interested in adventure/eco-tourism (Soufrière) or entertainment (Rodney Bay). Cruise ships come in at Castries and tourists disembark there to enjoy duty-free shopping and take short excursions.

Performance of the Tourist Industry, 1999-2001: Number of arrivals by year.

Year	No. Stay-over arrivals	No. Cruise arrivals
1999	263,793	351,233
2000	259,850	443,551
2001	250,132	489,912

Source: Ministry of Tourism, Statistics Department.

Between 1999 and 2001, the total number of stay-over visitors declined by 5.1%. However, during the same three-year period, the number of visitors arriving on cruise ships rose by 39.5%. Not too surprisingly, the GDP contribution by the tourism sector declined between 1999 and 2000 from 16.4% to an estimated 14.6%.

The slide in tourist numbers continued in 2001. In the third quarter (QIII) of 2001, total arrivals of tourists dropped by 3.4% to 91,960 because of a 7.6% decline in stay-over visitors. The 7.6% decline was the result, in part, of a drop of 11% in visitors from the UK, which occurred due to the discontinuation of a direct charter flight from England to St. Lucia. However, at the same time, arrivals from the U.S. rose by 5.8% to 10,314 and from the Caribbean by 5.5% to 10,664. There was a decline in visitors from all other regions (Eastern Caribbean Central Bank, *Economic & Financial Review*, Vol. 21, no. 3, September, 2001).

The events of September 11th in the US and the deepening and expanding economic depression globally combined to negatively-impacted the island's economy. As of August 2002, cruise ship arrivals were down by 18.8% over the previous year. However, the number of stay-over visitors improved slightly and excursion arrivals increased by 31.4%. Despite these increases, overall arrivals were off by 8% for the first half of 2002 as compared to 2001.

In an effort to halt the four-year downhill slide of the tourist industry, the government of St. Lucia (GOSL) increased promotional efforts in the United States. The opening of the Sandals St. Lucia Grande Hotel in November is expected to help increase visitor numbers. The re-initiation of a charter flight from the UK is also hoped to improve the arrival numbers.

At the same time that the tourist sector was suffering a decline, agriculture also experienced problems. Agriculture in 1996 comprised only 10.7% of GDP but which employed over 44% of the working population. The majority of the contribution, both in terms of GDP and employment, came from banana production. The banana industry employs some 160,000 St. Lucians, many of whom are small farmers.

A series of natural disasters and changes in the global and island business environment has negatively affected St. Lucia's banana industry. In 2001, the banana output decreased by 67.5% to 56,840 tons due to a severe drought and increased problems with a leaf spot disease (unspecified) (Eastern Caribbean Central Bank, *Economic & Financial Review*, Vol. 21, no. 3, September, 2001). However, in the first semester of 2002 banana production rebounded somewhat and St. Lucia exported 26,785 tons (compared to 19,834 tons in the same period in 2001). In 2002 St. Lucia banana exports earned EC\$31.8 million, making it the top banana exporter of the Windward Islands for that semester. Unfortunately, tropical storm Lili hit St. Lucia in October, severely damaging banana plantations. As a result, nearly 40-50% of the 2002 harvest was lost.

More serious still will be the removal of the preferential quotas set by the EU, St. Lucia's banana industry's principal market. The EU has been protecting the industry with preferential quotas, but these are to expire in 2006 (DuWest, *Banana News*, "Tropical Storm Lili Destroys About Half of St. Lucia's Banana Crop", p. 3).

Since 1999, the construction industry output has decreased gradually due to the completion of government projects and as other projects began to wind down to completion in 2001. The construction industry was expected to increase in 2001-2002 as the public sector implements new projects in road maintenance and construction. The GOSL has increased public capital expenditures by 7.4% through improvements to the Vieux-Fort-Soufrière and Castries-Gros Islet highways, as well as the completion of two new fisheries complexes at Choiseul and Soufrière and construction of new jetties and schools around the island. In 2001, the continued fiscal spending of the government despite declining revenues increased the deficit by 0.8% to \$25.3 million. Liquidity in the banking sector tightened.

An International Trade Commission (ITC) statistics report for St. Lucia for the value of imports from 1996 to 2000, shows very little substantial change in the value of imports of any of the food categories after 1998. One exception is for fresh, chilled and frozen beef. The import values of this category continuously increased from 1998 through 2000 from US\$2.185 million to US\$3.01 million. For all of the categories for f&v, including fresh, chilled, frozen, prepared and dried f&v and fruit juices; the value of imports dropped between 1999 and 2000. For the four categories of fish and seafood products provided by the report (Fish-Live/fresh/chilled/frozen; Fish-Dried/salted/smoked; Crustaceans/mollusks, etc; and Fish/shellfish- prepared/preserved), all but Crustaceans/mollusks showed almost no change (Fish-Live/fresh/chilled/frozen) or a decline in value. The increase in the value of crustaceans and mollusks was only 7%, from US\$869,000 to US\$932,000.

The most recent information concerning import statistics is a report by the St. Lucian Statistics Department comparing first quarter (Q1) imports for 2001 with those of 2000. Those results show the effect that the continued depressed demand for St. Lucian services has had on the St. Lucian economy. Total imports for Q1 2001 was valued at US\$77.7, million, which represented a sharp decline of over 15% in comparison with the same period for 2000. Most of this decline was in machinery and manufactured goods and articles. Food and Live Animals, traditionally an important import category, experienced a 7.6 % decline from US\$17.93 million to US\$16.57 million. Imports from St. Vincent and the Grenadines suffered a major decrease in value, over 77%, and Barbados and Guyana also suffered a drop in value imported. It appears that Dominica picked up some of the trade lost by Barbados and Guyana as the value of its imports increased by over 70% (“Analysis of Trade: For 1st Quarter 2001 Compared to 1st Quarter 2000,” Statistical Department, Ministry of Finance, St. Lucia).

In general, there is much commentary in St. Lucia on the negative effects of globalization on the Caribbean island economies. The GOSL has stated that it intends to meet the challenge of globalization with economic diversification, agricultural diversification to soften the blow of the gradual removal of EU protection for OECS bananas and private sector development. St Lucia has a widely promoted “Buy Local” campaign to encourage islanders to buy locally manufactured or produced items so as to reduce the dependence on imports, thereby improving the balance of trade.

The Distribution Channel for Fruits and Vegetables; Red Meats, Fish and Seafood; and Selected Sauces, Seasonings and Preserves

DOMESTIC PRODUCTION

Fresh Fruits and Vegetables

As mentioned above, the bedrock of agriculture in St. Lucia is the banana industry and it is an important employer of labor for the economy. However, declining productivity, a series of painful blows from Mother Nature and worldwide prices have eroded the industry's ability to contribute to the economy. Efforts to improve productivity have yielded some results in the last year and the industry seemed to be recovering despite the 2001 drought and leaf spot epidemic, only to receive a hard hit from tropical storm Lili in late 2002.

Increased competition, particularly from Latin American bananas, the loosening of the EU import preference regime and low productivity and returns have forced many smallholders out of bananas. Many of them have tried diversification to other horticultural crops, which are not grown on the island on a large scale. The Ministry of Agriculture, Lands, Forestry & Environment (MAAFE) has a program to promote and assist smallholders to diversify their production and to encourage exports.

Diversification of banana growers into organic banana production is a major effort that was beginning to show some rewards until Lili hit. Non-traditional crops that are exported by St. Lucia include: dasheen, sweet potatoes, yams, mangos, plantains, avocados, ginger, breadfruit, dried hot peppers and coconuts (in shell). However, total export volumes and value declined between 1995 and 2000 from 1,588 mt to 771 mt and EC\$ 3.3 billion to EC\$ 1.9 billion. Most of the decline in exports occurred in 2000.

Overall value of non-traditional crops for 1991 to 2000, which include both domestic consumption and exports, increased from EC\$ 18.9 billion to EC\$ 26 billion. Most of these gains were made between 1993 and 1994, when total production value jumped particularly for hot peppers, roots and tubers, melons, plantains, coconuts and avocados. Cabbage, lettuce, green peppers, tomatoes and cucumbers also experienced a considerable jump in value at that time and have sustained those increases in value or increased in value over the ten-year period. However, cocoa, copra, carrots and pineapples have gradually lost value over the period between 1991 and 2000. As a result of the poor performers, improvements for other crops are largely offset. Based on production value, overall performance has been mostly static, fluctuating between EC\$ 19-21.5 billion with occasional jumps up to EC\$ 23.5-26 billion (1994, 1998 and 2000).

The marketing of fruits and vegetables is open and very competitive as farmers have several options in marketing their products. Contract farming is not successful on the island as the small farmers tend to sell to the buyer with the highest price at the moment of harvest, despite any previous marketing agreements. Those farmers with transportation may sell directly to the supermarket and food service industry (hotels and restaurants).

Some have roadside stands. These are mostly found in the country, outside of urban areas.

Guyana has little or no produce on the market in St. Lucia. Quarantine officials interviewed stated that they had not inspected Guyanese product and believed that none was admissible. However, further research indicates that there are at least two vegetables admissible to St. Lucia from Guyana, shallots and hot peppers. The entry status of a list of fresh fruits and vegetables from Guyana and Trinidad is provided in Annex III. The reasons given for non-enterability of so many fruits and vegetable are discussed in the section on regulatory agencies, import regulations and Customs requirements.

Fish and Seafood

The Fisheries sector contributes EC\$ 24 million (US\$ 9.2 million) annually to the St. Lucian economy. Estimations of fish landings between 1981 and 2000 show a gradual improvement from 891 to 1,795 mt. Production levels are now reported to be an average 1,967 tons. Almost all of the fishing is coastal and the majority of fishing activity is on an artisan level for pelagic and reef species.

There are an estimated 1,235 full-time fishermen and 800 part-time fishermen. Approximately 1,050 boats of which 97% are 25 ft open boats with 55-115 hp outboard engines. There are a few larger boats but no fishing on the scale of commercial fishing (Fisheries Department).

Fishing is seasonal. The fishing season is February to May/June during which the pelagic fishing brings in wahoo, mahi mahi, tuna, kingfish, dorado and dolphin. From July-October, fishermen switch to the reef species such as the snappers, mussels, conchs (called “lambi” locally) and spiny lobster. The majority of this activity is by potting. Tuna season opens in October.

In addition to fisheries there is a small aquaculture industry. Since 1989 the number of fish farmers has increased from 1 to around 30 in 1999/2000. Around 1996 the area under production stabilized. The area is small and the amount of fish and shrimp produced is also small. Shrimp production has gradually fallen off since 1993 and is minimal. It is unlikely that this industry is sustainable and it does not represent, at this time, a source of competition for imports or local fisheries.

St. Lucia exports chilled fish, mostly wahoo, to Miami, which re-exports it. There is also some export of fish by informal fishermen and wholesalers to nearby Martinique and other islands.

Imports include salmon, both smoked and frozen from the UK. Guyana imports include shrimp, butterfish and bangamary. Two Trinidad & Tobago companies exporting to St. Lucia are Tobago Sea Products (flying fish) and Seafood Enterprises (shrimp).

Red Meats

Domestic production of red meats in St. Lucia is minimal. Much of the red meats are imported. The tropical Bont tick, *Ablyomma variegatum*, (TBT) has been a serious limiting factor in livestock production on the island until the late 1990s when the tick was declared to be “provisionally” eradicated from the island. The term “provisionally free” refers to the high risk of re-infestation. Some of St. Lucia’s neighbors are not yet Bont tick-free and the parasite is easily transported by birds, travelers and high winds (tropical storms). Five of the ten islands that have had the tick have not yet succeeded in eradication and in 2000, TBT broke out again in St. Croix and St. Vincent.

The tick itself causes skin irritation and infection as well as anemia in untreated cases. In addition, the tick is a vector for *Cowdria ruminantium*, a micro-organism that causes heartwater disease, a cause of rapid death in domestic animals. Fortunately this disease has only been found on Antigua. The tick is more commonly also associated with bacterial dermatophilosis, both St. Kitts and Nevis have experienced devastating outbreaks of this disease. Both diseases kill livestock and reduce milk and meat production.

The eradication of the parasite may allow livestock and milk production to improve. St. Kitts also was declared TBT-free in the late 1990s and their cattle production has rebounded from 400 to 3,500 head and local beef production there has begun to replace some imports (FAO: AG21 MAGAZINE, May 2002, “Tick Control in the Caribbean, p. 2).

Other programs to increase production of rabbit and duck are underway. Black belly sheep and goat are of interest to producers. There is a small production of pork, which is protected by the government, which has set a minimum percentage of purchases of local pork by wholesalers. Local pork production is largely sold directly to processors, butchers and retailers such as the hotels, restaurants and supermarkets.

Nevertheless, the island is largely dependent on meat imports from the US, Canada and other countries. However, there is a ban on the import of meat from Guyana due to foot and mouth disease.

Sauces, Seasonings and Preserves

St. Lucia has its own agro-processors that produce condiments and sauces. Those include Viking Foods (owner: Ed Zepherin), Barons Foods, Ltd. (owner: Ronald Ramjattan), and Frootsy (owner: Eldon Serieux). The larger processors are Barons and Viking. Ronald Ramjattan, the owner of Baron, is Guyanese. Baron’s processing facility is located in Vieux Fort.

Sourcing raw materials can be a problem for larger processors, as volumes produced tend to be in small lots and many fruits and vegetables are seasonal. The smaller processors,

such as Frooty, purchase product when it is in season and freeze it to hold for later processing. There are some micro-processors (Quality Foods and Rompatty Flavius (also Guyanese)) that are working with the SEDU. These are cottage industry-scale operations that have such a small output that they have no trouble in sourcing enough raw materials for their processing runs. Many of these peddle their products at roadside stands.

Mr. Ramjattan has found that OECS freight costs and other issues make importing fresh fruits and vegetables difficult. He believes that it is easiest to ship semi-processed raw materials from Trinidad. Having the product semi-processed saves on per unit transportation costs and avoids other problems, such as phytosanitary issues.

He believes that it is difficult to work with Guyanese exports. First, it is hard to work with the exporters. Second, fresh fruits and vegetables would be hard to get to St. Lucia in a timely manner and the cost would make them too expensive for processed products. Third, there is no HACCP control in the processing stage in Guyana. Because of St. Lucian standards, he cannot buy from them.

Sales by local processors of their condiments and sauces, with the exception of the roadside sales of cottage-industry products, are through direct sales to food retailers. Imported products are handled either by the importers/distributors or the retailers themselves.

The two seasonings that were in supermarkets that are produced by Guyanese processors are the green seasoning and hot sauce. Cassareep was not available in the supermarkets surveyed. Green seasoning made by Baron, Viking and Sheik is available in most supermarkets with the price ranging from US\$1.11 (Sheik) to US\$1.27 (Baron) for 5.5-6 oz bottles. Hot sauces found include McIlhenny's Tabasco sauce, Louisiana Hot Sauce (made in Canada!), Baron's Blazing Hot Pepper Sauce and Classic All Natural Hot Pepper Sauce, Viking Traders Pepper Sauce, Quality Food's Banana Pepper Sauce, President's Choice hot sauce and Frooty's Hot Pepper Sauce. Prices range from \$1.04-1.27 for 5.5-6 oz bottles of these brands. A list of products and retail prices is provided in Annex II.

Besides the usual other seasonings found on supermarket shelves were garlic, garlic herb, green herb, onion and "grilling" seasonings. Manufacturers of these products are the same as for the hot sauces and green seasonings and prices and bottle sizes are similar, about 5-6 oz as for those as well.

WHOLESALE/IMPORTERS/DISTRIBUTORS

Fruits and Vegetables

There are two public markets, one each in Castries and Vieux Fort. These are open-air markets, not really terminal markets, and a visit to the Castries market was sufficient to see that the facilities need to be modernized. There are also a number of wholesalers who

purchase from the farmers and supply the food retailers and service industries. An important wholesaler of these products is the St. Lucia Marketing Board (SLMB).

The SLMB assists small holders by acting as a wholesaler, purchasing their products to sell to the St. Lucian supermarket, hotel and restaurant trade and for sale in their own retail outlets. The SLMB also has a retail outlet located in its offices in Castries. The Board purchases the f&v directly from farmers at established farm gate prices, which are posted weekly but subject to change, as most products tend to be seasonal and prices change rapidly as harvest begins and ends. The market manager stated that there are many farmers who will not sell through the marketing board but that he believed that they would be better served to do so to avoid being taken advantage of by other intermediaries and to organize production scheduling to avoid over-supply, which often occurs and which results in severe market price crashes.

The Ministry of Trade is the sole importer of bulk rice, bulk sugar and baker's flour. The GOSL also is the sole importer of six other commodities: cabbage, lettuce, tomatoes, carrots, sweet potatoes and eggs. In addition to domestically-grown fresh produce, the SLMB imports fruits and vegetables from Miami, which are sold to the hotel and restaurant trade. The manager of SLMB believes that the SLMB handles around 40% of the fruits and vegetables sold on the St. Lucian market. One restaurateur interviewed complained bitterly about the unfairly high (in his estimation) and erratic prices of potatoes supplied to him by the SLMB.

Sales of fruits and vegetables tend to be in small lots to all but the larger supermarket chains, hotels and restaurants. Demand fluctuates with the seasonal tourist trade, as one would expect. There are inefficiencies in the production of many products as there are periods of considerable over-supply which lead to extremely low prices and periods of scarcity, particularly for the seasonal fruits, that result in very high prices.

In general, the produce section of the supermarkets visited in Gros Islet, a JB Supercentre and Julie 'N, were small, the variety of products offered limited and the quality variable. The frozen f&v section was more ample and included a number of items missing in the fresh section. Retail and wholesale prices are found in Annex II.

Insofar as imports of fresh f&v from Guyana into St. Lucia are concerned, the Plant Quarantine Office told me that no f&v were allowed into St. Lucia from Guyana because of fruit fly quarantine. Moreover, they were not aware of any attempts to import fresh f&v from Guyana. Upon pointing out that not all f&v are fruit fly hosts and that banning all of them based solely on fruit flies did not seem logical, it was suggested that the Guyanese exporter fill out an import permit form, including a list of all the products to be imported and send it to their office for examination and a decision. However, the Customs Officer, Mr. Ford, could find no restrictions on entry of f&v from Guyana.

Fish and Seafood

Fishermen sell fresh catch to wholesalers, processors, fish markets associated with the central markets in Vieux Fort and Castries, out of the boat to consumers and to hotels and restaurants. Approximately 37-43% of the catch is sold to one of the St. Lucia Fish Marketing Corp., Ltd. (SLFM) depots. The fish are chilled at these facilities and either sold wholesale to hotels, restaurants and supermarkets chilled, sold at their retail outlets in Castries and Vieux Fort or consolidated and processed at the processing facility in Vieux Fort, which does primary processing and freezing and has a storage capacity of 310 tons. The SLFM also has a mobile retail unit, which has a rural route that is made three times weekly.

In 1999, the European Commission made an inspection of the Fisheries products of St. Lucia to assess the conditions, storage and final export of fishery products in St. Lucia. They visited three processing facilities. None of the three met the requirements laid down in Council Directives and a number of deficiencies in the regulation and control of the industry were noted. The inspectors concluded that while there are regulations that establish food hygiene, they are not equivalent to EU requirements. Among the recommendations made was that St. Lucia have time to present a plan to upgrade standards and practices to meet EU requirements and that a second visit be made (European Commission, Directorate-General XXIV Consumer Policy and Consumer Health Protection, Food and Veterinary Office Paper XXIV/1091/99-MR Final (07/06/99), "Report of a Mission Carried Out In Saint Lucia From 15 to 19 March 1999 For the Purposes of Inspection of Fishery Products, pp.7).

The SLFM and retail prices for different fish products are in Annex II.

Red Meat

According to a 1997 FAS report on the Caribbean market for meat imports, US beef was relatively expensive and primarily imported for middle and higher end retailers in the tourist sector. Beef from Australia and New Zealand, which was relatively cheaper, was purchased by the middle-lower end market. Exports of fresh and frozen beef to St. Lucia in 1997, by value, are dominated by Australian beef (US\$475,000); followed closely by the US (US\$408,000) and then by New Zealand (US\$115,000).

At that time, the most widely purchased cut of US beef was fresh boneless, accounting for 37% of total US export value to St. Lucia. Other beef import categories included: frozen bone-in beef (23%), frozen boneless beef (20%) and fresh bone-in beef (19 %).

La Toc Frozen Foods is a company of Peter & Co., Ltd, a large importer/wholesaler of a number of products in St. Lucia. La Toc imports dry goods and frozen meat products, including beef, pork, lamb and goat from the US, Australia, New Zealand and Canada. Beef and lamb are in high demand as they are produced in very low volumes on the island and premium cuts are needed. The exception is pork, of which there is some local

production. Wholesalers are obliged by law to purchase at least 40% of their pork from local producers.

The frozen foods buyer for La Toc, Mrs. Claudia Belmar, would be interested in receiving a price list of the different cuts that will be available from Guyana. She stressed that she was looking for US quality cut grade meat that met St. Lucian standards and are processed in a HACCP certified production facility. Guyanese exporters would have to apply to the Veterinarian Office for permit. She noted that St. Lucia, which is free of foot & mouth disease, has extended the ban beyond that of the worldwide ban on some sources of these meats because of this disease and further suggested that the application should be made well in advance of any planned shipments as it sometimes took 3-6 months for the Veterinarian Office to check into the supplier.

CMJ Holdings, a wholesaler/retailer, does not import meat at the present time. They purchase meats from larger importers for their retail operations. They would be interested in starting importing in 2003, however. CMJ Holdings has four retail outlets called Maison Salaison.

Mr. Kevin White, the purchasing agent for Chef's Choice Meats, Ltd. imports beef, lamb, pork and goat from the US, Australia and Canada. They import a lot of beef in particular, sourcing the premium cuts from the US and Canada and the lesser cuts (shoulder, etc) from Australia. The beef from the US is boxed. It is produced to USDA specifications and he would require that certification of any supplier. The meat is cryovacked and frozen. Mr. White confirmed that there was a requirement for the purchase of 40% of sales to be local-produced pork, which, he said, is too fatty.

Grew 1989, Ltd. is a meat packer and processor. They are looking for leaner pork than is produced on the island for ham production.

THE RETAIL FOOD SECTOR

There are innumerable small country stores scattered throughout the rural areas and urban centers. No one is really quite sure how many there are and many have closed due to the effects of the economy and a trend towards shopping in the urban supermarkets. Most of these sell dry goods and some staple products such as onions and garlic (St. Lucia Chamber of Commerce).

There are around 30 supermarkets in St. Lucia at the present time but the two most important in terms of total square footage and sales are Julian's and J Q Charles Supermarkets. Both are St. Lucian owned. Julian's Supermarkets, which has 4 locations, started out as an investment by Barbadian Julie 'N Supermarket with a local investor, Mentielle Chausnet. The Barbadian investor in Julie 'N pulled out of the investment, leaving the chain to the local investor (St. Lucia Chamber of Commerce). The 11 JQ Charles Supermarkets are part of JQ Charles, Ltd., which has a variety of other interests on St. Lucia. Both supermarket chains are modern and have a wide variety of products, many of which are imported.

The variety of f&v products offered is different from that of Barbados and Trinidad, in part due to the different racial make-up of the island and due to rich soils, relatively abundant rainfall and climate, which allow for the production of a wider variety of fruits and spices. Due to the low numbers of citizens and visitors of East or West Indian extraction, fewer supermarkets offer a much narrower variety of the oriental/Indian vegetables, such as bitter melon. Varieties of vegetables offered tend to be more like those known to US and European consumers. For example, the variety of eggplant is more like the “Black Beauty” or Italian type, rather than the longer, narrower and more thin-skinned Indian and Chinese types.

The fresh f&v section of the supermarkets tends to be small, much smaller than the frozen food section. The products displayed demonstrate signs of mishandling and age, which suggests low turnover. This is not surprising considering that the survey was made well outside the tourist season and there were few shoppers in the stores. Both variety and quality of the fresh produce section may be better during the high tourist season. However, the size of the produce section is clearly fixed by space and equipment restrictions so it is unlikely that the volume of products would increase much through the year. Overall, the variety of produce is narrow as compared to that of the frozen vegetable section, which usually occupies a much larger area along the walls of the supermarkets.

LUMBER AND FURNITURE TRADE

Domestic Production of Lumber

The 1993 estimate of natural resources land use indicated that some 13% of the land on St. Lucia was forest and woodland.

Production data reported for the years 1997 through 2000 by the Ministry of Agriculture, Lands, Fisheries and Forestry is incomplete for some years; however, it provides indications that the forestry and logging industry activity in St. Lucia is not large enough to meet construction demand.

Annual Production Data for Forestry and Logging for St. Lucia from 1997 through 2000.

Year	Poles, Post, Pickets & Bamboo		Timber & Teak	
	Quantity (number)	Value (EC\$)	Quantity (cu. ft.)	Value (EC\$)
1997	1,612	14,554	unknown	11,676
1998	758+	7,144+	1,062	4,090
1999	172+	2,630+	2,283+	10,228+
2000	994	10,336	2,216+	8,199+

Source: Ministry of Agriculture, Lands, Fisheries and Forestry and the Saint Lucian Statistics Department.

Sawn Timber and Wood Product Imports

St. Lucia imports significant volumes of lumber and other wood products to supplement its own production and supply the demand of the construction industry. In 2000, St. Lucia imported pitch pine, mahogany, greenheart and Caribbean cedar worth EC\$13.43 million (US\$4.97 million).

The Reported Quantity and Value of Wood Products Imported into St. Lucia in 2000.

Commodity Description	Quantity (tm)	Value (US\$)	Sources
Pitch pine	6,573	2,016,496	HN, MT, PR, TT, US
Other coniferous wood sawn or chipped lengthwise	5,228	2,661,186	BR, CA, HN, MT, TT, US, USVI
Mahogany	7	840	GU, UK, US
Caribbean cedar	0.08	48	MX, TT
Greenheart	146	84,723	BR, GY
Other wood sawn or chipped lengthwise	1,004	240,275	BD, CA, GY, MT, UK, US
Total	12,957	4,974,978	

Courtesy of CARICOM Secretariat-Guyana and Toni Williams. Abbreviations (HN-Honduras, MT-Martinique, PR-Puerto Rico, TT-Trinidad & Tobago, BR-Brazil, CA-Canada, US VI- US Virgin Islands, GU-Guatemala, UK-United Kingdom, MX-Mexico, BD-Barbados, GY-Guyana)

As can be seen in the above table, the wood products derived from conifers, especially pine, are the leading wood products imported into St. Lucia. Imports of these products alone totaled some 11,801 mt (or roughly 580, 40-ft containers of 20.4 ton capacity), nearly 91% of all wood products imported into St. Lucia in 2000. In contrast, the volume of greenheart, produced in Brazil and Guyana, imported in 2000 represented only 1% of total imports, only about 7, 40-ft container shipments. Clearly, pitch pine and coniferous wood products are in the greatest demand on St. Lucia. Pine is a more economical product than the tropical hardwoods. The reported value of pitch pine was US\$0.31/kg as compared to US\$0.58/kg for greenheart and US\$1.18/kg for mahogany. With special treatments, the properties and useful life of pitch pine and other pines can be amplified and extended to make them a reasonable and economical substitute for woods such as for greenheart that previously were considered more durable, rot and insect resistant and superior for structural and marine applications. Moreover, pine is relatively soft and easy to work; therefore, the use of pine reduces labor cost and accelerates completion of construction projects in comparison with the use of greenheart, which is so dense and heavy that it requires pre-drilling for joining and quickly dulls saw blades (which increases both labor and tool costs). It would seem, that while the demand for and use of greenheart is unlikely to cease, it will not be in great demand.

Other miscellaneous wood products that were reported as having been imported into St. Lucia in 2000, listed in order of volume and value, are: wood strips and friezes for parquet flooring, wood charcoal, which includes shell or nut charcoal; non-coniferous

wood in chips or particles and insignificant amounts of cork and sawdust and other waste. The total value of all of these products was reported as US\$67,236.

The import of wood products related to furniture and house furnishings was dominated by bedroom furniture, of which 205 mt were imported, valued at US\$933,115.

Lumber Wholesale and Retail

Home Depot imports greenheart occasionally although the bulk of demand is for pitch and southern yellow pine. Using a history of demand for greenheart, they have developed a reorder schedule for specific sizes. Most of that demand comes from owners of older homes made of greenheart who need the wood for repairs and maintenance. They will custom order when they get at least sufficient demand for a half-container.

Sunbuilt, a discount super store for building materials, has had greenheart in stock but due to the long turnover rate, stopped stocking it. They have never handled purpleheart. The purchasing agent for Sunbuilt indicated that the treated pines seemed to have replaced the use of greenheart and that as greenheart is so heavy its use is restricted to just certain types of construction uses and so is less versatile for construction projects.

Masters Builders also reported having a few (about 30) pieces of greenheart lumber in stock. It doesn't move quickly and they have no plans to replace it.

A couple of the wholesalers recommended a construction company called Ice Cap as one that had a lot of experience in using greenheart in construction projects around the island.

IMPORT REGULATIONS AND REGULATORY AGENCIES

The Plant Protection Act No. 21 of 1988 provides the legal framework of the control of imported plant materials. Plant Protection Regulations, Statutory Instrument No. 66 of 1995 provides the regulations and requirements that must be followed to import plant products.

St. Lucia is free of the Mediterranean fruit fly, according to the Plant Quarantine Service. As St. Lucia aspires to develop its export industry for fresh f&v to the US, it follows the US guidelines as far as quarantine of fresh f&v from countries categorized as having fruit flies (*Anastrepha spp.*), particularly the Mediterranean fruit fly. According to the office of the Quarantine Officer, fresh fruits and vegetables from Guyana are not admissible to St. Lucia on the basis of the presence of fruit flies in Guyana. A review of the list "Major Economic Crops of the Caribbean, Genera of Plants, The Unrestricted Entry Of Which Would Pose A Pest Risk", found in the 1995 regulations confirms that "soft, fleshy fruits and vegetables are prohibited" from areas where any member of the family of fruit flies (tephritidae) are known to occur. This would not seem to prohibit the entry of roots, tubers, pumpkins, etc, which are not usually considered fruit fly hosts. However, in addition to the quarantine restrictions for this pest, the presence of pink

mealy bug (*Manconellicoccus hirsutus*) in Guyana is an issue of concern for St. Lucian agriculture and its detection resulted in a ban of imports from Guyana in 1997. This would prohibit almost all agricultural products of interest. No clear response has been provided as to whether this ban has been or could be lifted under the protocol used for Barbados and Antigua.

The St. Lucia Bureau of Standards and the Pesticide Control Board (PCB), which is housed in the Ministry of Agriculture, are the agencies charged with the responsibility of regulating pesticide use on food products. The Pesticide Control Act of 2001 guides the work of the PCB and two agencies rely on the Codex Alimentarius for maximum pesticide residue tolerances allowed.

The Standards Act of 1990 established the St. Lucia Bureau of Standards (SLBS) as the government agency responsible for the development and promotion of national standards. A list of and copies of the national standards are available upon request from the SLBS. There are 54 national standards of which 46 are for quality specifications and labeling of commodities and pre-packaged goods (3) and three codes of practice. Seventeen of the standards are mandatory.

As a member of CARICOM, Saint Lucia will participate in the development of a body of standards for the community. In February 2002, CARICOM members signed Protocol III, which sets up the CARICOM Regional Organization for Standard Quality (CASQ) which entity has the responsibility of developing a body of standards for the community. This entity will be in place in early 2003. To date, at least ten standards have been developed and accepted. Those are available from the CARICOM office in Guyana. For those items not covered by the CASQ standards, Saint Lucia will continue to apply its own standards.

The Veterinary Unit has the responsibility of inspecting and controlling imports of meats and fish and seafood into St. Lucia. The legal basis for the competence of the Veterinary Division regarding Export Health Certification is provided in the Animal (Diseases and Importation) Ordinance (Amendment) Act No. 15 of 1994. The Quarantine Officer contacted did not know the exact reference for the regulation that lends the Veterinary Unit the responsibility and authority for this activity, nor that of the regulations controlling imports of these products. However, the Quarantine Officer stated that red meats produced in Guyana are not allowed entry into St. Lucia due to "health" (food safety) restrictions. The act governing health conditions for food (including fish) and food handling is the Public Health Act of 1975 and the Public Health (Foods) Regulations No. 70 of 1980.

The Fisheries Act of St. Lucia, Statutory Instrument No. 10 of 1984 gives the St. Lucia Fisheries Division authority to regulate the fisheries industry. The Fisheries Regulations of St Lucia Statutory Instrument No. 9 of 1994 give the Fisheries Division the regulations and requirements for the import and export of fish and seafood products. In effect, the SLMB, a part of the St. Lucia Fisheries Division, is the sole importer of fish and seafood.

The Entry Processing Unit of the St. Lucia Customs & Excise Department is unaware of the ban on entry of red meats from Guyana into St. Lucia. When asked whether there

were any restrictions on frozen meat products from Guyana, he responded in the negative. Documents required by Customs for fish and seafood and red meats include a CARICOM certificate of origin, a veterinary's certificate from the country of origin and the commercial invoice and airway bill or bill of lading. Lumber has no restrictions and does not require a health or fumigation certificate "but it would be wise to have one for the first shipment".

CUSTOMS DOCUMENTARY REQUIREMENTS

Information on shipping documents must be in metric units.

For all shipments the following documents are required:

- Commercial invoice: five copies
- CARICOM Certificate of origin: five copies
- Bill of lading or Airway bill
- Packing list: not mandatory but facilitates customs clearance
- Phytosanitary/Veterinary certificates, as appropriate

Go-Invest and NGMC maintain a list for many countries of importers, wholesalers and distributors of fresh and processed fruits and vegetables, lumber and wood products and fish and seafood. For more information, contact us at:

Go-Invest
190 Camp Street
Georgetown
Guyana
Tel: 592 225 0658
592 227 0653
Fax: 592 225 0655

NGMC
87 Robb and Alexander Streets
Georgetown
Guyana
Tel: 592 226 8255
592 227 1630
592 226 2219
Fax: 592 227 4114

ANNEX I

CONTACT LISTS

Veterinary Division

Address: 4th Floor, NIS Bldg, Waterfront, Castries
Contact: Veterinary Officers: Drs. Xanthe Dubuison, Darius Gabriel
(Chief), Charles Isaac
Tel: 758-450-3213/5
Email: chiefvet@slumaffe.org

Crop Protection and Quarantine Unit, Plant Quarantine Desk

Address: 4th Floor, NIS Bldg, Waterfront, Castries
Contact: Mr. Mathurin
Position: Chief Quarantine Officer
Tel: 758-450-2375
Fax: 758-450-1185
Email: research@slumaffe.org

Forestry Division

Contact: Cornelius Isaiah
Position: Asst. Chief Forestry Officer
Tel: 758-450-2375

Fisheries Department

Address: Fisheries Bldg, Point Seraphine, Castries
Contact: Vaughn Charles
Position: Chief Fisheries Officer
Tel: 758-468-4134/5
Fax: 758-452-3853
Email: chieffish@slumaffe.org

Pesticide Control Board

Contact: Mr. Guy Mathurin
Position: Chairman

St. Lucia Marketing Board

Address: Marketing Board Building, Castries
Contact: Michael Augustine
Position: General Manager
Tel: 758-452-3214

St. Lucia Bureau of Standards

Address: 4th floor, Healdine Rock Bldg., Castries
Contact: Sariah Best-Joseph or Mrs. Plant
Tel: 758-453-0049
Email: slbs@candw.lc
Website: www.slbs.org.lc

Customs Office

Address: Jeremy St, Castries, St. Lucia
Contact: Mr. Ford
Position: Customs Officer
Tel: 758-468-4801 ext 4820
Fax: 758-453-7526, 452-4959

St. Lucia Demography

Contact: Richard Harris
Tel: 758-452-3716

Ministry of Tourism

Contact: Louis Lewis
Position: Head, Statistics
Tel: 452-4094

Eastern Caribbean Central Bank

Address: Financial Center, 3rd Floor, Bridge St., Castries
Tel: 452-7449
Fax: 453-6022

St. Lucia Chamber of Commerce, Industry & Agriculture

Address: P.O. Box 482, Vide Bouteille, Castries
Contact: Silvester Henry
Position: Director
Tel: 758-452-3165
Fax: 758-453-6907
Email: info@stluciachamber.org

Prime Minister's Office

Contact: Mr. Earl Bousquet
Tel: 468-2113

ANNEX II

PRICES RETAIL AND WHOLESALE FOR FRESH FRUITS AND VEGETABLES, FISH AND SEAFOOD AND RED MEATS

Table 1. Commodity Daily Prices Reported by the St Lucia Marketing Board for Selected Fruits and Vegetables for the Week of August 16, 2002 .

(EC\$ 2.60 = US\$ 1.00)

Commodity	Unit	A (EC\$)	B (EC\$)	C (EC\$)	Wholesale Average	
					(EC\$)	(US\$)
Breadfruit	each	0.45			0.45	0.17
Cabbage, green	kg	3.52	1.32		2.42	0.93
Cabbage, white	kg					
Bittermelon, chinese	kg					
Christophene	kg	5.39	2.49		3.94	1.51
Cucumber	kg	1.87			1.87	0.72
Eggplant	kg	3.19			3.19	1.23
Okra	kg	4.40			4.40	1.69
Plantain, green	kg	1.43			1.43	0.55
Pumpkin	kg	4.73	4.14	3.30	4.06	1.56
Pepper, sweet	kg	4.4	2.49		3.44	1.32
Tomato	kg	6.6	3.30		4.95	1.90
Long bean	kg					
Lime	kg	3.74			3.74	1.44
Cassava	kg					
Eddoes, imported	kg					
Eddoes, local	kg					
Ginger	kg	4.95	2.97		3.96	1.52
Sweet potatoes	kg	1.76			1.76	0.68
Coconut	kg					
Avocado	kg	1.76			1.76	0.68
Bananas	kg	1.54			1.54	0.59
Orange	kg	1.65			1.65	0.63
Papaya	kg	1.98			1.98	0.76
Pineapple	kg	6.05	1.65	2.97	3.56	1.37
Watermelon	kg	4.84			4.84	1.86

**Table 2. Retail Prices for Fruits and Vegetables in St. Lucia
for the Week of August 16, 2002.**

Commodity	Source	JB Supercentre (EC\$/kg)	Julians (EC\$/kg)	Average (EC\$/kg)	Average (US\$/kg)
Watermelon	local	4.95	5.39	5.17	1.99
Green beans		7.48		7.48	2.88
Green peppers	local		5.50	5.50	2.12
	Dutch		36.30	36.30	13.96
Tomatoes	local	5.50	6.60	6.05	2.33
Cucumbers		3.30	2.31	2.81	1.08
Lettuce	local		7.70	7.70	2.96
Okra		4.95		4.95	1.90
Green cabbage		7.15	6.93	7.04	2.71
Carrots		6.27		6.27	2.41
Passion fruit		6.05	5.39	5.72	2.20
Eggplant		2.64	1.65	2.15	0.83
Sweet potato		2.75	2.75	2.75	1.06
Dasheen		2.38	2.31	2.34	0.90
Portuguese yams		5.50		5.50	2.12
White yams			7.70	7.70	2.96
Plantain		1.43	1.23	1.33	0.51
Christophene		7.70		7.70	2.96
Butternut squash			4.62	4.62	1.78
Papaya		2.31	2.86	2.59	0.99
Pineapple	CR		13.18	13.18	5.07
Carambola			1.43	1.43	0.55
Avocado			3.30	3.30	1.27
Breadfruit			2.20	2.20	0.85
Mangos			1.32	1.32	0.51
Limes			4.29	4.29	1.65

Exchange rate: 1 US\$= EC\$ 2.60.

Table 3. Retail Prices for Fish and Seafood in St. Lucia for the Week of August 16, 2002.

Commodity	Cut	JB Supercentre (EC\$/kg)	Julians (EC\$/kg)	Average (EC\$/kg)	Average (US\$/kg)
Shrimp	med	57.20		57.20	22.00
	lge	81.40		81.40	31.31
Kingfish	steak	17.27		17.27	6.64
Dolphin	steak	20.57		20.57	7.91
Tuna	steak	21.45	19.78	20.61	7.93
Conch			31.90	31.90	12.27
Flyingfish	filets of 6	10.14	9.50	9.82	3.78

Exchange rate: EC\$ 2.60 =
US\$1.

Table 4. Retail Prices for Selected Sauces, Seasonings and Jellies in St. Luca for the Week of August 16, 2002.

Product	Brand	Unit	Vol	JB Super. (ECS)	JQ Charles (ECS/unit)	Julians (ECS)	Julians (ECS/unit)	Average (ECS/unit)	Average (US\$/unit)
Green seasoning	Baron	oz	5.5	3.44	0.625	2.99	0.544	0.585	0.225
	Viking	oz	5.0	3.10	0.620			0.620	0.238
	Sheik	oz	6.0	2.99	0.498			0.498	0.192
Average				3.18	0.581	2.99	0.544	0.568	0.218
Hot sauce	Frootsy	oz	5.5	3.23	0.587			0.587	0.226
	Baron	oz	5.5	3.44	0.625			0.625	0.241
	Louisiana	oz	6.0	2.8	0.467			0.467	0.179
	Viking	oz	5.0			3.25	0.650	0.650	0.250
Average				3.16	0.56	3.25	0.650	0.58	0.224
Garlic herb seasoning	Frootsy	oz	5.5			3.23	0.587	0.587	0.226
	Sheik	oz	5.0			2.28	0.456	0.456	0.175
Average								0.522	0.201
Banana pepper seasoning	Quality Foods	g	150			2.34	0.016	0.016	0.006
Green herb seasoning	Viking	oz	5.0			2.95	0.590	0.590	0.227
Jellies								0.303	0.116
orange marmalade	La Grenade	g	340	7.55	0.022			0.022	0.009
	Best	oz	18			6.99	0.388	0.388	0.149
	TESCO	g	454			8.99	0.020	0.020	0.008
Average				7.55	0.022	7.99	0.204	0.143	0.055
pineapple	Matouk	g	307	4.32	0.014			0.014	0.005
guava	Aurore	g	375	8.19	0.022			0.022	0.008
	Matouk	g	454			6.85	0.015	0.015	0.006
	Quality	oz	17			5.99	0.352	0.352	0.136
Average				8.19	0.022	6.42	0.184	0.130	0.050

Exchange rate: ECS 2.60= US\$1.

ANNEX III

THE ENTRY STATUS OF SELECTED FRESH FRUITS AND VEGETABLES FOR ST. LUCIA

COMMODITY	SCIENTIFIC NAME	TRINIDAD	GUYANA
Sweet potato	<i>Ipomea batatas</i>	N	N
Eggplant	<i>Solanum melogene</i>	N	N
Christophene	<i>Sechium edule</i>	Y	N
Yam	<i>Dioscorea spp.</i>	N	N
Cassava	<i>Manihot esculenta</i>	N	N
Tannia	<i>Xanthosoma sagittifolium</i>	N	N
Eddo	<i>Colocasia esculenta</i>	N	N
Malanga	<i>Colocasia esculenta</i>	N	N
Watermelon	<i>Citrullis lantana</i>	Y	N
Pumpkin	<i>Cucurbita maxima</i>	Y	N
Hot pepper	<i>Capsicum spp.</i>	Y	Y
Chinese bitter melon	<i>Momordica cochinchinensis</i>	Y	N
Bottle gourd	<i>Lagenaria siceraria</i>	Y	N
Shallots	<i>Allium sepa</i>	Y	Y
Passion fruit	<i>Passiflora edulis</i>	N	N
Pineapple	<i>Ananas cosmosus</i>	N	N
Avocado	<i>Persea americana</i>	N	N
Mango	<i>Mangifera indica</i>	N	N
Papaya	<i>Carica papaya</i>	N	N
Suriname cherry	<i>Eugenia uniflora</i>	N	N
Lime	<i>Citrus latifolia</i>	N	N
Carambola	<i>Averrhoa carambola</i>	N	N
Plantain	<i>Musa acuminata</i>	N	N

ANNEX IV

PUBLICATIONS IN THE EXPORT MARKET SERIES

- BULLETIN No. 1: RAPID RECONNAISSANCE SURVEY OF THE NEW YORK CITY MARKET FOR GUYANESE PRODUCTS, NOVEMBER 2002.
- BULLETIN No. 2: RAPID RECONNAISSANCE SURVEY OF THE TORONTO MARKET FOR GUYANESE PRODUCTS, NOVEMBER 2002.
- BULLETIN No. 3: THE LONDON MARKET FOR GUYANESE PRODUCTS, A RAPID APPRAISAL, AUGUST 2002.
- BULLETIN No. 4: MARKET PROFILE: BARBADOS – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 5: MARKET PROFILE: TRINIDAD – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 6: MARKET PROFILE: ST. LUCIA – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 7: MARKET PROFILE: ANTIGUA – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 8: MARKET PROFILE: MARTINIQUE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 9: MARKET PROFILE: GUADELOUPE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 10: MARKET PROFILE: ST. MAARTEN – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 11: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN No. 12: THE CARIBBEAN MARKET FOR FISH AND SEAFOOD – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).

- BULLETIN NO. 13: THE CARIBBEAN MARKET FOR FRESH FRUITS AND VEGETABLES – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN NO. 14: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN NO. 15: MARKET PROFILE: NORTHERN BRAZIL – A RAPID RECONNAISSANCE SURVEY (EXPECTED IN JULY 2003).

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