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Export Market Opportunities

Market Profile:

Trinidad & Tobago

A RAPID RECONNAISSANCE SURVEY



EXPORT MARKET SERIES: BULLETIN No. 5

February 2003

EXPORT MARKET OPPORTUNITIES

MARKET PROFILE

TRINIDAD & TOBAGO

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

Export Market Series Bulletin No. 5

February 2003



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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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TRINIDAD

BACKGROUND NOTES

Trinidad is the larger of the two islands that comprise the Republic of Trinidad and Tobago (TT). Trinidad has an area of about 5,128 sq. km., roughly the size of Delaware. The island is located at 10° N, 61° W and is in the path of the Northeast trade winds, at the southern end of the chain of Caribbean islands, 11km off the coast of Venezuela. This places the islands just outside the normal path of hurricanes and tropical storms. The climate is tropical, with temperatures of 21-30° C. The average annual rainfall is around 200 cm. The dry season is from January to May and the rainy season from June to December (www.cia.gov).

The population is around 1.3 million, making it the most heavily populated island in the chain of Caribbean islands. The racial makeup of the Trinidad & Tobago is: 40% Afro-Trinidadian, 40% East Indian and the remaining 20% is Chinese, Syrian, Lebanese and European. The population is well-educated. The average annual GDP per capita was an estimated US\$9,500 in 2000 (www.cia.gov).

Trinidad is a transportation hub for the region. It has excellent air and sea links. By air, Trinidad is 2,598 km from Miami (4 hr), 3,200 km from New York (5 hr) and 6,400 km from London (9 hr). There are two seaports, Port of Spain and Point Lisas ([www.trinidadlaw.com/Doing Business](http://www.trinidadlaw.com/Doing%20Business)).

ECONOMIC OUTLOOK

Although the economy of TT is one of the most diversified in the English-speaking Caribbean, it is heavily reliant on oil, natural gas and petrochemical products. Over the five years between 1997 and 2001, the Republic has experienced a run of real GDP growth of over 4% annually.

As the result of successfully implemented economic reforms initiated in 1995, Trinidad & Tobago has earned a reputation as an excellent country for investment by international investors (www.cia.gov).

In 2001 GDP grew an estimated 3.5%. According to the Central Bank of Trinidad and Tobago, the most growth occurred in government, which increased spending by some 15.7%. Growth also occurred in construction, utilities and distribution; however, manufacturing declined by 3%. The agricultural sector was adversely affected by bad weather. The phenomenon of increased GDP growth during a general worldwide recession is believed to have occurred due to: (1) low concentration in the industries most affected by the worldwide recession; technology and communications, manufacturing, travel and tourism; (2) strong activity in the energy sector, despite low prices and (3)

increased government spending. The Central Bank of TT projects GDP growth for 2002 of around 3%. Additionally, the Central Bank expects decreased inflation (Central Bank of Trinidad and Tobago, 2001).

Important Economic Indicators for Trinidad & Tobago.

Average 5-yr Inflation rate:	4.4 %
Inflation rate in 2001:	5.5%
Average 5-yr real GDP growth:	4.0%
GDP growth rate in 2001:	3.5 %
Basic prime lending rate in 2001:	15.7%
Average 5-yr unemployment rate:	4.4%
Unemployment rate in 2001:	10.7%

Source: Central Bank of Trinidad and Tobago, November 2001 Economic Bulletin.

Tourism comprises only 2-3% of the GDP of TT, which is low in comparison to other Caribbean islands, which are much more dependent on tourism. In 2000, tourism contributed US\$208 million to the GDP of Trinidad & Tobago. The Government of TT (GOTT) wishes to increase the importance of tourism to the economy and has increased its investment in programs to promote TT as a tourist destination. One of its programs is designed to encourage more airlines to make TT a major destination.

THE DISTRIBUTION CHANNEL FOR FRUITS AND VEGETABLES; FISH AND SEAFOOD; AND SELECTED SAUCES, SEASONINGS AND PRESERVES

DOMESTIC PRODUCTION

Fruit and Vegetables

Trinidad has an estimated 15% arable land. Much of the agricultural production activity is in the central area of the island. Most of Trinidad's large-scale agricultural production is in rice and sugar cane, although recent prices for these products have made them less attractive. Trinidad produces a good quality cacao. There is some production of coffee but the product is not of a fine quality and, given the current market for coffee, this will be a difficult crop from which to earn profits over the next 3-4 years. Production of horticultural crops is limited mainly to cultivation on smallholdings. Fruits are widely grown but, with the exception of some citrus, rarely in large-scale orchards (NAMDEVCO).

It is widely acknowledged that Trinidad is not capable of producing sufficient food to meet the all of the needs of its population. Agriculture, while still a major source of income, has lost importance as an employer over the last several years, with employment in the sector dropping from 459,000 jobs in 1995 to 396,000 jobs in 1999, a drop of 15%

or 3%/annum. In 2000, the average annual employment had further dropped to an estimated 364,000. During the same period, the production levels of the major agricultural commodities, citrus and cocoa experienced large drops, 30% and 37%, respectively; while sugar and coffee experienced large increases, 21% and 57%, respectively. The coffee that is domestically produced is almost all consumed locally and is not exported. Production of food crops also experienced a decrease. Production of important staple crops dropped 39% overall between 1995 and 1999. Greatest reductions in production were for pumpkin and eggplant. The exceptional crop was dasheen, which experienced a large jump in production in 1996 and which continued to be cultivated in increasing volumes annually through 1999 (Economic Bulletin, 2001).

Although TT produces a good deal of horticultural products and their price is lower than for that of Guyanese produce, some products from Guyana are finding a market in TT. Plantains and some other Guyanese-produced f & v have been competing successfully in the TT market (Stabroek News, December 5, 2001). The plantains are reportedly being exported to a TT processor as raw material for a chip product.

Fish and Seafood

There are two fishing fleets in TT, one is small-scale local fleet and the other is a fleet of self-contained, offshore trawlers that fish and process their catch, mostly swordfish and other deep-sea fish. Tobago fishermen provide a great deal of the flying fish that are sold in the region.

Currently there are about 114 trawlers operating out of Trinidad, 25-26 of which fish in the Gulf of Mexico. Nine are semi-industrial 1½-day trawlers. Tobago has around 300 small boats of which 10 or so are iceboats. Around 25 boats are medium-sized, semi-industrial boats that can go out for 7-10 days at a time and run long lines for tuna and swordfish. There are an estimated 1,100 day-fishers who do line fishing, gill netting and potting.

THE WHOLESALE SECTOR

Fruits and Vegetables

Farmers sell fruits and vegetables through a wide network of roadside stands, public and wholesale markets. Some sell directly to supermarkets. There is reportedly very little contract farming in Trinidad, although Fresh Farms, a wholesaler/importer/distributor, reports using contract farming for part of its supply of fresh produce. There are an estimated 20 open-air markets scattered throughout the island, which are most active on weekends.

The National Agricultural Marketing Development Corporation (NAMDEVCO) operates two wholesale terminal markets: the Macoya market in Port of Spain, and the Debe market in South Trinidad. These are important markets for the transfer of product from the farmer to buyers. These markets open at around 1:30 pm to 2 pm and are open for active trading until 4 pm. The markets consist of offices and two or more open-sided sheds. Each shed is sub-divided into small “slots” which are rented for TT\$15-20/day, depending on whether the area is in the center aisle or located along the docks; the docks being the more desirable location. Farmers and buyers do a brisk business in the two hours allotted and produce changes hands quickly. Fridays tend to be the busiest day and Mondays, the slowest.

The Macoya market, which only recently opened in March of 2002, offers around 250 “slots” in the market. The market has proven to be so successful that a third market shed is planned for construction soon. The number of farmers that take advantage of the services of the market is unknown but there are around eighty wholesalers operating out of the market to date. There is no list of wholesalers available. However, since the wholesalers must rent space to operate out of the market and the officers record market prices twice daily, walking the sheds and observing transactions to do so, the market manager and his officers have come to know most of the wholesalers (Market Manager, Macoya wholesale market, Anthony Sydney). The officers could be a valuable source of information for inquiries for names of wholesalers to whom to sell produce.

There are no restrictions on who may participate in the wholesale terminal market. For example, in addition to the Trinidadian farmers, producers from St. Vincent are represented in the market, selling mostly root crops. The vendors from St. Vincent offer a wide variety of very nice grade roots and tubers (r&t) and they were mentioned frequently by the supermarkets and wholesalers contacted as suppliers of r&t.

Buyers in this market may range from housewives purchasing produce for home consumption to wholesalers, restaurateurs and purchasing agents for cost-strategy supermarkets and small-scale food manufacturers. PriceSmart’s buyers reportedly source from the wholesale markets.

Wholesalers and importer/distributors consolidate local production and imports to meet much of the food retail demand. Wholesalers generally purchase f&v from farmers at

wholesale markets and supply retailers and the food service industry. Wholesalers may move products from one wholesale market to the other wholesale market in Debe. Wholesalers may also import products, usually from the USA, to broaden their product line. They may sell the imported items along with locally produced products at the wholesale markets, where products are picked up in small lots by buyers for small restaurants and green grocers or food marts. They may also purchase imported items from other wholesalers in one market to sell in another open-air market elsewhere.

NAMDEVCO provides the Commodity Daily Price News Service, a list of the wholesale prices for f&v, as well as fish, by fax, email (www.namdevco.tt) and weekly newspaper advertisement. Prices are collected from the Macoya Wholesale Market daily and are given in Trinidadian dollars.

Fish and Seafood

The actual consumption of fish and seafood in TT is unknown. A study of the national consumption of fish and seafood is currently underway. It is known, however, that chilled fresh fish are favored over frozen and that chicken is preferred over fish and seafood. The scarcity of fish, frozen or fresh, to be found in the supermarkets is testimony to this assertion because it reflects the recognition by the purchasing agents of the supermarkets of the low demand for these products.

There is a good deal of roadside selling of fresh seafood (There is a truck selling fresh oysters on Queens Park that is something of an institution). It is thought that white fish, such as butterfish and bangamaree, is the most popular type of fish. There are wholesale fish markets, one at the Sea lots in the Port of Spain and another in Orange Valley Central, that provide a venue for trading of fish between local fishermen and wholesalers. A list of wholesale prices for fish is provided in Annex II.

THE PROCESSING SECTOR

Beside the wholesalers and distributors who act as intermediaries between the producer and the consumer, there are the food processors and manufacturers who purchase product from the producer and transform the fresh f&v or meat to value-added products. Many of the processors sell their products locally through direct sales to food retailers. For export markets, they may choose to use direct sales or may sell through distributors in the export market who act as manufacturer's agents/representatives, negotiating sales and placing product for the manufacturer with the retailers in the export market.

Fruits and Vegetables

Trinidad has one of the largest food processing industries in the Caribbean. At the present time, the GOTT protects the producers and manufacturers of food products who are not competitive with larger companies. This is accomplished in part through the use of tariffs

and other barriers. However, opportunities exist for large and medium-scale growers, organized groups of small growers, Guyanese fruit & vegetable exporters and small-medium Guyanese processors to supply certain fresh f&v or semi-processed f&v products to the Trinidadian processors as raw materials. An example of this is the case of the Guyanese exporter who is supplying plantains to a TT processor for chip production.

The following list enumerates some of those companies in Trinidad that manufacture food products. Products of some of these companies can be found throughout the Caribbean.

Sauces, Seasonings, Jellies and Jams

Best Food Co, Ltd	KMC Associates
JGM Products Co, Ltd	National Canners, Ltd (Matouks brand)
Imasekha Enterprises	National Fruit Processors
Eslat Caribbean, Ltd	RHS Marketing, Ltd
FAM Marketing	Turban Brand Products, Ltd
Chief Brand Products	Viken Industries, Ltd
Genuine West Indian Products	Walglan Enterprises, Ltd

Dairy Products (yoghurts, ice cream flavoring)

Original Foods, Ltd
Willies Homemade Ice Cream

Snack Foods

Holiday Snacks, Ltd

Fish and Seafood

Most of the local fleet catch is consumed by the TT domestic market or processed and sold in the CARICOM region. There are seven or so primary processing facilities in TT and ten other smaller processors with minimal facilities and processing activities that package and export.

The National Fisheries is a trans-shipment port facility in Port of Spain that provides berthing and cold storage facilities to the industrial fleets of Taiwan and other nations operating in the South Atlantic. Many of the wholesaler/processors that export to the US and Europe operate out of this facility.

National processors in TT are supplied by national and proprietary fleets and buy from Guyanese processors/fleet to supplement supply. They sell to local retailers, the oil and gas rigs and export frozen fish and seafood products to supermarkets and wholesalers throughout CARICOM. Trinidadian processors cannot export to the European Union

because of non-compliance with health standards, although they are working towards compliance to have the ban lifted.

THE RETAIL FOOD SECTOR

The Consumption Habits of Trinidadians

Because of the polyglot of cultures that comprise their society, the diet of Trinidadians includes a wide variety of f&v. West Indian, as well as Chinese and European foods, is very much in demand. A number of roots and tubers common to the African diet are also commonly found in the marketplace. However, as a result of close contacts with the US through travel, immigration, the increasing number of USA franchise fast food restaurants opening in Trinidad and Tobago and access to US television programming, there is increased demand for many American foods as well.

The end consumer in Trinidad purchases fruits and vegetables on the basis of either cost or quality, depending on their economic ability. For example, prices for non-staples in St. James and West Moorlands, urban areas of high-income homes, are much higher than for the same products in Chaguanas, a more suburban/rural area. However, the quality of f&v and their presentation is much better in those areas than the more rural areas. While there are commonalities in the staple products required, there is geographical differentiation in quality awareness and cultural diet needs for fruits and vegetables, which is an important factor for consideration for successful retailing of food products in TT.

Substantial imports of food products are necessary to supplement local production to satisfy demand. The retail food sector has sales of US\$ 2.6 million daily of which some 70-80% of the food is imported (draft report of Retail Food Sector for Trinidad & Tobago, CBATO, 2002). Fresh fruits and vegetables that are imported to supplement local production include dairy products, processed foods and cool climate crops such as cauliflower, broccoli, carrots, butternut squash, onions, potatoes, beets, apples, grapes, apricots, plums and specialty tomatoes (mostly cherry tomatoes). Tropical roots and tubers from St. Vincent are widely available although there is some local production of these crops as well.

Table 1 provides a list of food products imports for 2000 and their import values. The table compares the growth rate trends for import values for the years 1996-2000 and 1999-2000 ("List of product groups imported by Trinidad and Tobago in 2000," www.trademap.net/itc/country). The growth rate between 1996 and 2000 for the import values of most of the categories was strongly positive, with the exception of tobacco, oil seeds, cereals, sugar and sugar confectionary and edible vegetables and certain roots & tubers, which were in negative territory. However, between 1999 and 2000, growth rates slowed or were reversed to become negative, with the notable exceptions of: (1) beverages, spirits and vinegar 94% (2) meat, fish and seafood food preparations 28% (3) miscellaneous edible preparations, 12% and (4) dairy products, eggs, honey and edible

animal products 9%. The value of these edible products continued to grow despite the general decline in the growth of import values and, presumably, in import volumes.

Total import value of plant and animal products to Trinidad & Tobago in 2002 was over US\$240.3 million. Of this, edible products made from fruits, vegetables, nuts and root and tubers (r&t) comprised US\$46.6 million, or 19.4% of imports, and meat, fish and seafood products totaled 32.2 million, 13.4%. Dairy, eggs and honey (animal byproducts) imports totaled US\$47.3 million alone.

Several agricultural products that are imported to Trinidad might offer good prospects as opportunities for other producing nations: fruit and vegetable juices, processed fruits and vegetables (especially frozen), eggs and egg products and red meat (lamb, pork and beef).

The Supermarket Retail Sector

Fruits and vegetables are widely available to consumers. There are a large number of small country stores, corner stores, green grocers, and roadside stands. The number of retail supermarkets on the two islands total in the hundreds. However, there are about six chains of supermarkets which dominant the retail supermarket sector.

The retail food industry in Trinidad has been experiencing the same changes in structure that have been seen worldwide since the beginning of free trade efforts globally. Independent stores in TT have developed into retail chains through either purchasing other stores or constructing new stores in strategically important residential neighborhoods. Some chains have been bought up and re-structured or closed. (HiLo's purchase of Budget resulted in the closure of one Budget store). In order to compete more effectively, some chains have been forced to re-assess the performance of some stores and close poor performers (Tru-Value has recently closed three) and modernize store facilities to meet a more demanding consumer (better lighting, cleaner facilities, etc).

The largest retailers in TT are PriceSmart, HiLo Supermarket, Xtra Foods, Tru-Value, JTA and Southern Food Basket. PriceSmart is relatively new in Trinidad but has already opened two outlets around Port of Spain and is the only retailer with foreign investment. HiLo is the largest chain, with 17 stores throughout Trinidad. It recently acquired Budget Stores' three stores, closed one, and continues to operate the remaining two, for a total of 19 stores island-wide. The newly opened HiLo at West Moorings is the chain's flagship store. Xtra Foods has only two stores but claims to be number two in market share after HiLo. Southern Food Basket is both an importer/wholesaler and retailer and has three outlets. JTA Supermarkets has four stores. Table 2 summarizes the current situation for supermarkets with respect to numbers of stores, type of ownership, number of years in business and suppliers of fresh f&v.

Table 1. List of Product Categories of Agricultural Origin Imported by Trinidad & Tobago in 2000.

PRODUCT	VALUE 2000 (‘000 US\$)	ANNUAL GROWTH IN VALUE, 1996-2000 (%)	ANNUAL GROWTH IN VALUE, 1999-2000 (%)
Meat and edible meat offal	18,290	7	4
Fish and seafood	3,229	3	-6
Dairy products, eggs, honey, edible animal products	47,403	0	9
Live trees, plants, bulbs, roots, cut flowers, etc	511	6	11
Edible vegetables and certain roots & tubers	19,873	-2	-6
Edible fruits, nuts, citrus fruit peel, melons	8,652	20	5
Coffee, tea, mate and spices	3,355	5	-18
Cereals	16,192	-24	-63
Oil seed, oleagic fruits, grain, seed, fruit, etc.	5,605	-38	-37
Meat, fish and seafood food preparations	10,819	13	28
Sugar and sugar confectionary	15,172	-3	-11
Cocoa and cocoa preparations	5,729	18	2
Cereal, flour, starch, milk preparations and products	15,756	9	10
Vegetable, fruit, nut, etc food preparations	18,032	15	3
Miscellaneous edible preparations	24,578	10	12
Beverages, spirits and vinegar	23,023	30	94
Tobacco and substitutes	4,123	-6	-50
TOTAL	240,344		

Prepared from: “List of product groups imported by Trinidad and Tobago in 2000 (http://www.trademap.net/itc/country_glo_2di.htm).

Table 2. Profile of the Major Supermarket Chains of Trinidad in August, 2002.

Store name	No. Yrs	Outlet Type	Ownership	No. Stores	Suppliers
Hi Lo Supermarkets		Supermarket	TT	19	Fresh Farms
JTA Supermarkets	14	Supermarket	TT	4	Farmers Gateway Foods HADCO Fresh Farms
Food Basket	45	Import Wholesale Supermarket	TT	3	Farmers Imports Wholesaler
Tru-Value Supermarket		Retail Wholesale	TT	4	Farmers Wholesaler Gateway Fresh Farms HADCO
Xtra Foods	30	Supermarket Wholesale	TT	2	Farmers Wholesaler
PriceSmart	3+	Club outlet	Foreign and TT	2	Wholesale market

Results of a survey of selected supermarket chains indicate that most of the larger supermarket chains rely on a limited number of suppliers of fresh fruits and vegetables. Some of the supermarkets buy directly from local farmers and wholesalers who deliver product to them and from Fresh Farms, Gateway and HADCO who are importer/wholesaler/distributors, who also deliver. Interviews with the purchasing agents for these four most-cited suppliers indicated that the supermarkets demand high quality products, large volumes, consistent offerings and reliable supply. Failure in any one of these might be tolerated on one or two occasions but not repeatedly as these service failures on the part of the supplier force the supermarket's purchasing agent to scramble for product. The distributors, therefore, try to identify and work with farmers or wholesale suppliers that provided the product quality and service that their clients, the supermarkets, require of them. One wholesaler interviewed indicated that the wholesalers rely on one another in case a product is short, helping each other out by supplying the short product.

Both retail and wholesale prices for fresh f&v can be found in Annex II, in Tables 1 and 2. The wholesale prices were provided courtesy of NAMDEVCO and are from the Commodity Daily Prices list taken from the Macoya wholesale market daily. Prices are posted on the NAMDEVCO website, www.namdevco.com or can be requested from namdevco@tstt.net.tt. A comparison of the wholesale price reported at the Macoya market (price of sales of farmers to wholesalers) and the retail price observed in various supermarket chains for selected products, reveal the total markup from farmer to retailer and the pricing strategy of the different supermarket chains, by product, in August of 2002.

Unlike Barbados and St. Lucia, in TT there is no obvious public policy to promote island-produced f&v at the retail level. The only indication of the source of any product that was observed in the produce section of one store was the identification of a package of eddoes as “imported”.

The vegetables that are found in the produce section of the supermarket are very similar to those found in Guyana. The selection is similar as are the varieties of fruits and vegetables. This is an important observation because this is not necessarily the case in other islands in the Caribbean. In some cases, the types of eggplant, West Indian vegetables and roots and tubers found in the market vary widely with what are found in Guyana and in some cases or are not found at all in the market. Compatibility of the product variety with what the consumer is accustomed can be crucial in successfully selling it at the retail level. Whenever contacting a new and unknown market, Guyanese exporters should discuss the appearance of their products to the wholesaler to verify that they are compatible with the consumers’ experience in the target market.

In addition to surveying supermarkets for fresh f&v, various sauces, seasonings and jellies were surveyed as well. Four major supermarkets were surveyed for casareep, green seasoning, jellies and hot sauce. No achar was offered by any of the supermarkets surveyed but similar products that were found were anchar, chutney and kuchella, which are all spiced mango preserves/pickles. Almost all brands on display were manufactured in either Trinidad or the US (hot sauces, jellies-usually in flavors of fruits not produced in TT). No Guyanese brands were found in these four supermarkets. The two brands of casareep were processed in Trinidad by: Guyana Jeanette in St. James (“Les”) and A Plus Industries in Chaguanas (“Lil Ana”). Other sauces and seasonings seen were brown seasonings, mauby, jerk seasoning and shadon beni, which are apparently made from culantro.

LUMBER AND WOOD PRODUCTS

A comparison of the figures in Table 3 indicate that pitch pine and “other coniferous” (usually Caribbean pine, *Pinus caribea*) woods are the import wood products for which there is the highest demand in Trinidad & Tobago. Total import volume of these two categories was 29,865 mt, some 90% of all sawn wood and chipped wood imported in 2000. Of the remaining woods, 1,242 mt imported was mahogany (*Swietenia spp*) or “other virola mahogany”. The remainder of the hardwoods, some 1,998 mt, was comprised of greenheart (*Ocotea rodiaei*), mora (*Mora excelsa*), Caribbean cedar (*Cedrela spp.*) and “Others not greenheart, mora or Caribbean cedar”. This last category is comprised of 16 species among which are found: locust (*Hymenea courbaril*), purpleheart (*Peltogyne pubescens*), the brown and kereti silverballi (*Ocotea puverula* and *O. canella*, respectively), simarupa (*Simarupa amara*), ipe (*Tabebuia serratifolia*) and kabukalli (*Goupia glabra*).

Mr. Seepersad Ramnarine of the Information Desk of the Research Section of the Forestry Division commented in an interview that 12 x 12 x 10-20 ft squares of

greenheart are being shipped into Trinidad & Tobago for processing by local sawmills. The demand for lumber is growing in TT and over the last few years he has observed more boards being imported than previously. Greenheart is used in TT for construction, particularly for boardwalks in swampy areas because it is a very durable wood in water. Purpleheart is also imported in squares and is prized for furniture and handicrafts. He noted that purpleheart is very dense and wears off the edge of bits and saw blades quickly, which makes it a relatively expensive wood with which to work.

This information is supported by the data in Table 3, which indicate that much more of the hardwoods are being imported, transformed and exported than for the coniferous woods, 72.6 mt v 15.3 mt (excluding “Other wood, sawn or chipped lengthwise”). Also, the value per unit of the transformed products is much higher than for the pine products (See Table 4).

Of these woods, Guyana is listed as a source for: Caribbean pine wood, chipped and sawn; Other Virola mahogany, Caribbean cedar, Greenheart, Mora, “Others, not Caribbean cedar, Greenheart or Mora” and “Other wood sawn or chipped lengthwise”.

Three or four sawmills in the area of Port of Spain report that they are importing several types of woods from Guyana. The most often mentioned woods are: crabwood (*Caropa guianensis*), greenheart, purpleheart, mora, and kabukalli. These sawmills are part of vertically-integrated furniture operations that import the squares of wood, reduce the squares to boards and then transform the lumber into fine furniture, doors, flooring, molding and panels for cupboards. These might be sold in a local retail showroom or exported to St. Vincent, Barbados, Martinique and Grenada.

Table 3. Volume and Value of Sawn Wood and Chipped Traded in Trinidad & Tobago, 2000. Exchange rate: US\$1.00=2.70 EC\$.

COMMODITY	EXPORTS		IMPORTS	
	VOLUME (MT)	VALUE (US\$)	VOLUME (MT)	VALUE (US\$)
Pitch pine	12.0	10,205	11,359	6,515,173
Other coniferous wood sawn or chipped	3.3	5,356	18,506	9,627,952
Mahogany	1.6	2,017	38.1	22,166
Other Virola Mahogany	15.2	25,570	1,086.1	544,762
Caribbean cedar	12.9	29,348	175.9	103,884
Greenheart	3.0	6,146	419.4	150,862
Mora	0.5	3,276	276.9	54,448
Others, not Caribbean cedar, greenheart or Mora	39.4	49,041	895.5	730,302
Other sawn wood or chipped lengthwise, Oak			24.6	11,730
Other wood sawn or chipped lengthwise	741.0	271,106	323.5	216,061
TOTAL	828.9	402,336	33,105	17,977,343

Source: CARICOM Secretariat and Toni Williams, 2002.

Studying Table 4, excluding greenheart and mora, whose reported small volumes of export and extraordinarily high export value suggest either the export of a specialized value-added final product of very high value or one or more errors in the record, the average increase in value of the transformed products is between 53% and 285% of the value of the raw material from which it was made for the hardwoods and is 48% for pitch pine and 212% for the “Other coniferous wood sawn or chipped” (Caribbean pine). These figures demonstrate the relatively high value that value-added products that these woods have in comparison to their raw state or as semi-processed components.

Table 4. A Comparison of the Value of Imported Wood Products and Transformed Exported Wooden Products of the Same Wood Category for Trinidad & Tobago, 2002.

Commodity	Imports	Exports	Markup (%)
	Value (US\$/mt)	Value (US\$/mt)	
Pitch pine	573	850	48
Other coniferous wood sawn or chipped	520	1,623	212
Mahogany	582	1,260	117
Other Virola Mahogany	502	1,682	235
Caribbean cedar	591	2,275	285
Greenheart	360	2,049	469
Mora	196	6,552	3,242
Others, not Caribbean cedar, greenheart or mora	815	1,245	53

Source: CARICOM Secretariat and Toni Williams, 2002.

Also of interest is the volume of exports of different wood products as compared to their imports. All of the imported oak products and almost all of the pitch and Caribbean pine, mora and greenheart imported stays in Trinidad, most likely as part of buildings or infrastructure or as goods manufactured for domestic sales; whereas for the last category “Other wood sawn or chipped lengthwise,” more wood is exported than imported. This might reflect the sum of both re-exports and domestically timbered wood. Mahogany, Caribbean cedar, “Other, not Caribbean cedar, greenheart or mora” and the “Other Virola mahogany;” are the categories of woods with the highest portion of the imported volume being exported. Nevertheless, only 1.5-7% is of these woods are exported as value-added products. The rest of the volume is lost in the transformation process or consumed on the domestic market.

Table 5 shows the total volume and value of value-added wooden products, which consist of mostly furniture, furniture components and small wooden items, imported into and exported out of Trinidad in 2000. The total value of imports was US\$4.0 million in 2000. It would appear that despite the active manufacturing industry in Trinidad that there is a high demand for imported furniture and household furnishings, particularly for seats and office and bedroom furniture. Of these categories, Guyana is reported as a source of seats

with wooden frames, office furniture and bedroom furniture. Specific volumes for Guyanese products are not given.

For miscellaneous wood products such as charcoal, wood chips or particles, and strips for friezes for parquet; about 181 mt with a reported value of \$147,000 were imported into TT in 2000. The overwhelming majority of these imports, 174 mt, consisted of parquet strips, some of which came from Guyana along with parquet from the US, Canada and the Netherlands.

Table 5. Volume and Value of Value-Added Wooden Products Imported and Exported , Trinidad & Tobago, 2000.

COMMODITY	EXPORTS		IMPORTS	
	VOLUME (MT)	VALUE (\$US)	VOLUME (MT)	VALUE (US\$)
Wooden frames for small objects	9.6	75,619	7.5	24,585
Other wooden screws	.004	1,395	46.3	118,802
Other seats with wooden frames	38.8	38,910	735.9	1,498,168
Office furniture	28.8	128,198	366.4	1,362,905
Kitchen furniture	30.7	105,352	130.4	272,906
Bedroom furniture	146.1	621,607	272.7	729,811
Furniture used in churches, schools and laboratories	2.1	8,939	17.3	55,946
TOTAL	256.1	980,020	1,576.5	4,063,123

IMPORTS REGULATIONS AND REQUIREMENTS

In general, TT follows the internationally accepted food standards and may refer to those of Canada, the US and Europe as well. The four most important laws controlling the import of foodstuffs are the Food & Drug Act of 1960, the Pesticide & Toxic Chemicals Act of 1979, the Animal Disease Importation Act of 1954 and the Plant Protection Act of 1975. The Ministry of Health's Chemistry, Food & Drugs Division has the responsibility of implementing and enforcing both the Food & Drug and Pesticide & Toxic Chemicals Acts. The Ministry of Food Production and Marine Resources' Veterinary Service and Plant Quarantine Service enforce the last two acts, respectively. Weights and measures are controlled by the TT Bureau of Standards (FAS GAIN Report #TD2001: Trinidad and Tobago: Food and Agricultural Import Regulations and Standards Country Report, 2002).

The Food & Drug Act controls package labeling under Chapter 30:01, Part II, Section 16. Health officials follow Codex Alimentarius standards and US standards as well with regards to the maximum allowable pesticide residues in foods. There are no national standards for this and there is no national list of banned/restricted products or residue

tolerances (FAS GAIN Report #TD2001: Trinidad and Tobago: Food and Agricultural Import Regulations and Standards Country Report, 2002).

Specific certificates from the regulating government agency in Guyana that may be requested by TT officials are:

- Health Certificate
- Fish Inspection Certificate
- Meat Inspection Certificate
- Phytosanitary Certificate

CUSTOMS DOCUMENTARY REQUIREMENTS

The Customs Office still has not responded to my fax request for information.

OPPORTUNITIES FOR GUYANESE ENTERPRISES FOR EXPORTS TO TRINIDAD

According to industry contacts in Trinidad, there exists a long-term relationship between the sawmills in Trinidad and some of the logging and sawmill operations in Guyana. So, there is already some commerce between Trinidad and Guyana of these two types of products. At least one sawmill in Arouka advertises that it retails Guyanese woods and provides a list of the woods in large letters on the side of its shed

Without having all the information on what everyone in Guyana is doing in the exporting of fresh f&v, bottled sauces and seasonings and lumber, nor having received a reply from the Quarantine Service as to the admissibility of f&v, I will make some suggestions as to marketing opportunities for each of these types of products.

Fresh Fruits and Vegetables

Trinidad has reliable and very low cost energy, which confer an advantage to their processors over those of other CARICOM countries such as Guyana. Although TT has higher labor costs than Guyana, once past the preparation phase of peeling, seeding or pitting, chopping, etc, f&v processing requires little manual labor. Also the TT processors possess the financial resources and knowledge required to implement the Good Manufacturing Practices and HACCP program needed to meet hygiene standards of export markets. These would be difficult to meet by newcomers to processing and artisanal processors in Guyana trying to compete for import permission and market share in TT. However, by semi-processing f&v in Guyana for final processing in TT, there might be an opportunity for exporting a value-added product. An example of this would be washing, grading and crushing hot peppers in Guyana to prepare a mash to send to TT to be transformed into hot sauce in TT, rather than shipping fresh chilies or attempting to introduce a new hot sauce product in the TT market.

Holiday Snacks, Ltd. imports all of its raw materials from the EU and US to make corn, potato and tortilla chips and salted peanuts. Guyanese producers could replace at least the

peanuts and also could grow malanga (*Colocasia* spp.) for malanga chips. Malanga chips are not currently a product of Holiday Snacks, Ltd., but it is similar to a potato chip and is a popular snack in Hawaii. It is gaining popularity in the US in a chip product sold in supermarkets called “Terrachips” and is a mix of chips from several different vegetables and fruits (plantain), including malanga. Small Honduran processors are beginning to offer malanga chips to the local market in Honduras and these are becoming very popular with consumers. Also, there have been requests for samples of these chips in the US by wholesalers in Miami who are interested in selling them as bulk raw materials to chip manufacturing companies.

There might also be opportunities for sales of fruits, spices, herbs and vegetables to processors in TT of condiments, sauces, jellies and jams and frozen or aseptic packs of fruit concentrates, tidbits and puree for the dairy industry in TT.

An interview with Mr. Yasir Khan of Chief Brand Products, the Consumer Relations Officer, provides insight to how a relation might be developed between Guyanese exporters and a TT food processor.

Chief Brands was founded more than 45 years ago by Mr. Khan’s father, who is now deceased. Upon the death of the founder, Chief Brands passed into the sons of his two sons, Rafie and Yasir, who now run the company. Chief Brands now has a product line of some 300 products ranging from snack foods and condiments to spice mixes, sold under the brand “Chief”. Mr. Khan is always looking for new, more economical or more reliable sources of raw materials to process. For example, he would be interested in green mango, papaya and tamarind for his line of pickles and amchar and black pepper, tumeric (a very orange-coloured variety would be preferable) and culantro (not cilantro) for his line of spices. Very red chilies are of interest for the Chief hot sauce product line.

In addition to the opportunities for providing him with raw materials, Mr. Khan expressed interest in the possibility of developing some products that would require semi-processing in Guyana and finishing in TT and, if all went well and the opportunity presented itself, setting up a processing plant in Guyana. Shipping semi-processed f&v from Guyana circumvents some of the obstacles of phytosanitary issues but might incur problems with the TT use of standards for processed products. However, if the product is being processed for a large TT processor, it might not be subject to as much resistance to import.

Additionally, the party that undertakes the processing that is carried out in Guyana might benefit not only from receiving the income from a value-added product, but from working with the TT processor. This alliance might provide some financial and equipping assistance as well as training and assistance with setting up, organizing and managing a processing operation to the specifications of TT processing standards.

The advantages of receiving partially processed raw materials from Guyana might be considerable for the TT processor. Labor cost is higher in TT than Guyana and the savings in labor costs might be significant so long as the Guyanese labor is as efficient as his TT labor. Also, shipping costs are a significant portion of the cost of purchasing a unit

of imported raw material, some of the volume and weight of which is lost in the transformation process due to spoilage and wastage, which represents lost transportation cost. By carrying out some of the early stages of processing at the source of production of the raw materials the TT processor would reduce the production costs for the finished products by reducing part of the processing labor cost and the transportation cost of the raw material.

The following suggestions are developed around those f&v for which the results of a cost-benefit analysis have shown to be potentially profitable. In the event that f&v can be imported into TT, one should avoid direct competition with specific imports products from the US (green peppers, tomatoes, etc.) as the US exporters have longer-standing relationships of demonstrated good service and reasonable prices with the TT wholesalers and because the US exporters, due to their greater financial strength, have the capability to market aggressively, more aggressively than do the Guyanese exporters. It would be difficult to compete with St. Vincent with r&t because of their long-term standing in the market, but a cost analysis should be made to determine whether the r&t could be competitive with those from St. Vincent and whether St. Vincent supply has a weakness (a market window that they are not filling or a deficiency in their supply service, cost, etc.). Cost analysis is needed to determine what products are competitive/non-competitive with those of TT producers. For non-competitive products, an option might be skipping wholesalers as buyers and for the Guyanese to act as their own wholesalers to restaurants and supermarkets. Cost-benefit analyses would be required to determine the feasibility of this strategy.

With those caveats, the opportunities are basically market penetration and product diversification, depending on the business and production capabilities of the Guyanese exporter:

- Seek a TT importer/wholesaler in the wholesale trade,
- Sell in the wholesale markets to retailers,
- Form alliances between exporters/marketing cooperatives for farmers to concentrate sufficient product to supply the restaurant and hotel trade or target a single supermarket to supply, using an importer/wholesaler or customs broker/freight forwarder to deliver the product and
- Seek an alliance with a food manufacturer in TT to whom to send f&v, fresh or semi-processed, working towards switching from fresh f&v to value-added products for greater returns.

Sauces, Seasoning and Processors

Due to the strength of the TT manufacturing industry in terms of processing cost, financing, technology and market share and control and the relatively weak strength of Guyanese processors (small and medium-sized for condiments) in terms of processing control, financing, inadequately hygienic manufacturing facilities/technology and low

market share and strength, the following strategies might be recommended to gain market entry in TT:

- Seek an alliance with a food manufacturer in TT to whom to supply semi-processed products (i.e., bulk-packed concentrates, purees, etc) and increase earnings through growth in sales volume. This strategy requires steady supply of enough fresh f&v to meet orders from TT. It may require contract farming or proprietary production area and/or a combination of both.
- Become a subsidiary of the TT processor who can provide financing, technology, managerial skills to develop the business.

Fish and Seafood

Because the consumer in TT typically prefers other meats to fish and fresh fish to frozen fish, Guyanese fish processors must work towards changing their product mix to provide seafood products for which demand is increasing or supply is uncertain in TT or towards more highly processed fish products than whole gutted, filleted and steaks of fish; for example, processing quick frozen breaded fish fingers for sales to supermarkets, the industrial food market and restaurants.

There are two threats to the TT fishing industry that are of interest to this report. One threat arises from the possibility of over-supply of fish from the larger Venezuelan fleet. The other concern is that oysters are becoming scarcer which is attributed to a combination of over-harvesting, water pollution and the removal of mangroves in many places around the islands. The former represents a threat to the Guyanese interest in exporting fish to TT and the latter represents a short-term opportunity to Guyanese oystermen and crabbers, as mangrove crab populations would behave similarly to that of oysters.

Another development is the increasing demand for shrimp in TT reported by a few of the wholesalers contacted, which they attributed to an increased demand from the increasing number of tourists. Although TT is apparently in the process of planning or implementing the development of an aquaculture industry for the production of shrimp in TT, this trend might offer a short-term opportunity for Guyanese shrimpers and shrimp farmers. The competition for market share for these three seafoods might be substantial from Venezuela, Ecuador and Cuba in the long term.

Worldwide preoccupation with food safety is resulting in increasingly demanding requirements for meat processing. As developing countries determine to target developed country's markets, they are forced to adopt the food standard practices and codes of more highly developed processing industries in the target market. In order to meet the financial cost of implementing these changes, these processors must increase their volume of sales. To increase sales volume, the now-larger processors must sell more product to local, regional and export markets, thus increasing the supply of processed fish, increasing competition for market share. This trend is crowding out the small processors who do not

have the financial or knowledge resources to meet this challenge. However, while they struggle to meet the quality standard challenge, more and more competitors are overcoming these obstacles, thus increasing the number of competitors for the small processor in their traditional markets. As their markets become saturated with product that is of a higher quality standard and lower cost, the smaller processors are overwhelmed and fold. Local fishermen are also affected to some degree by losing their local processors and lower demand for fresh fish as more meat substitutes (chicken, pork, beef) become available.

The following list summarizes the opportunities to Guyanese fishers and fish and seafood processors:

- There might be opportunities in providing shrimp and crab. Contact processors and wholesaler-buyers for restaurants and discuss the potential for sales of these seafoods. Provide a price list.
- Processing facilities in Guyana should improve their facilities and processes to meet the US and European health standards.
- Processors should investigate the cost-benefits targeting more highly processed fish products than whole gutted, filleted and steaks of fish; for example, processing quick frozen breaded fish fingers for sales to supermarkets, the industrial food market and restaurants.
- Consider a different product altogether that requires the same plant layout and infrastructure: frozen tropical fruit juices, etc.

Lumber and Wood Products

Considering the high demand for wood in TT for domestic use in construction and furniture making and the imports of more furniture products, it would appear that there are opportunities for the production and export to TT of furniture and components for the furniture-making industry in TT. The owner of a small-medium-sized furniture production operation in TT that makes stuffed living room suites indicated that she is in need of light-weight but strong wood slats for the internal structure of her sofas and that she is constructing a “clean” room for finishing exposed wooden components and would like to start making wooden end tables for her suites. She was very interested in the concept of “knock-down” tables that could be produced as to her specifications in Guyana, shipped to her as components and then assembled and finished on her facilities. This type of product would be within the capacity of well-organized small facility in Guyana that can do a good work of cutting and preparing pieces but which has not yet developed sufficient skills in finishing products. Also, there would be less cost and loss from damage by shipping unfinished components rather than easily damaged finished components.

A list of sawmills, furniture makers and furniture retailers in Trinidad & Tobago is available from Go-Invest. The Trinidad and Tobago Chamber of Industry and Commerce provided this list. Although there was insufficient time to contact all of the businesses

listed, it might be useful in a future search for opportunities for sales for specific Guyanese suppliers.

There was not enough time to contact architects or builders in Trinidad to determine whether there is much use of the non-traditional tropical hardwoods other than greenheart and purpleheart in the construction of fine homes and office interiors. This is a market that should be investigated, considering the building boom that has been occurring, particularly on the outskirts of Port of Spain. If practical, the Guyanese exporter should try to supply custom cuts of dressed lumber, molding and other value-added products. Such a product mix would be more interesting to this market because it has the potential of saving the builder labor time at the building site in Trinidad, thus speeding up completion of projects while lowering labor costs and while offering an additional touch of luxury that increases the value and attractiveness of the project. Of course, this is a market that well organized medium to large-sized sawmills in Guyana could attempt. Obviously, it would not be an alternative for the independent chainsaw operator.

The following list summarizes the opportunities for Guyanese lumber and wood products in TT:

- Operations somewhat above the level of independent chainsaw operators could form a corporation or marketing cooperative to develop a processing facility to kiln-dry and process dressed lumber for export.
- Guyanese lumberyards should work towards shipping more value-added products to replace green lumber with kiln-dried, custom cut lumber, molding, door and window frames, etc from nontraditional wood.
- Vertically-integrate the operations for logging, sawmill and the manufacture of furniture, furniture components and architectural components (architectural details, panels, roofing, etc.) to building supply firms and architects with value-added tropical hardwood products at competitive prices.

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

GOVERNMENT AGENCIES

Ministry of Agriculture, Land and Marine Resources

Address: P.O. Box 389, St. Clair, Port of Spain
Tel: 868-622-1221-5 (PBX)
Fax: 868-622-8202

National Agricultural Marketing & Development Corp. (NAMDEVCO)

Address: Ministry of Agriculture, Land and Marine Resources
St. Clair Circle, St. Clair, Port of Spain
Contact: Anne Marie Carter
Position: Marketing Officer
Tel: 868-647-3218; 622-1221

Forestrys Division

Address: Library, Long Circular Rd., Port of Spain
Contact: Mr. Seepersad Ramnarine
Position: Information Desk Officer
Tel: 622-7476

Fisheries Division

Address: St. Clair Circle, St. Clair, Port of Spain, Trinidad
Contact: Siva Kuruvilla
Position: Fisheries Officer
Tel: 623-6028/8525
Email: mfau2fd@tstt.net.tt

Chemistry, Food & Drugs Division

Address: 92 and 115 Frederick St., Port of Spain, Trinidad
Tel: 868-623-5242
Fax: 868-623-2477
Email: cfdd@carib-link.net

Trinidad & Tobago Bureau of Standards

Address: Lot1, Century Dr., Trincity Industrial Estate,
Macoya, Tunapuna, Trinidad
Tel: 662-2832, 8827, 4481/2
Fax: 868-663-4335
Email: ttbs@carib-link.net
Website: www.opus.co.tt/ttbs

Customs & Excise Division, Ministry of Finance

Address: Nicholas Court, Abercromby St and Independence Square,
Port of Spain, Trinidad
Tel: 868-625-3311
Fax: 868-623-2477

OTHER CONTACTS IN TRINIDAD & TOBAGO

Hotel, Restaurants and Tourism Association of Trinidad & Tobago

Contact: Bernadette Nathaniel
Position: Mgr-Hotel Association
Tel: 868-634-1174
Email: hotelassoc@wow.net

Supermarket Association of Trinidad & Tobago

Address: 10 Jasmine Terrace, Arima, Trinidad
Telfax: 868-664-2513

Trinidad & Tobago Chamber of Industry and Commerce

Address: Columbus Circle, Westmoorings, P.O. Box 499, Port of Spain
Contact: Cindy Theroulde
Position: Trade Information Officer
Tel: 868-637-6966
Fax: 868-637-7425
Email: ctheroulde@chamber.org.tt

Tourism and Industrial Development Co. of Trinidad & Tobago, Ltd. (TIDCO)

Address: 10-14 Phillips St., Port of Spain
Contact: Mr. Carl Francis
Position: Vice President, Trade and Industry
Tel: 868-623-1932-4, ext. 243
Fax: 868-625-0837

Central Bank of Trinidad and Tobago

Address: Brian Lara Promenade, Twin Towers, Port of Spain
Contact: Danielle
Position: Library, Statistics Desk
Tel: 625-2601

U.S. Embassy, Economic and Commercial Affairs

Address: 15 Queens Park West, Port of Spain, Trinidad
Contact: Karl Rios
Position: Asst., Economic and Commercial Affairs
Tel: 622-6371, Ext. 2116
Fax: 868-622-2444

OTHER SOURCES

Caribbean Basin Agricultural Trade Officer (CBATO), FAS/USDA

Address: 909 S.E. 1st Ave. Suite 720, Miami, Fl 33131

Contact: Omar Gonzalez

Position: Deputy Director

Tel: 305-536-5300

Fax: 305-536-7577

ANNEX II

PRICE LISTS FOR RETAIL AND WHOLESALE MARKETS FOR SELECTED FRUITS AND VEGETABLES, FISH AND CONDIMENTS, SAUCES AND SEASONINGS

**TABLE 1. COMMODITY DAILY PRICES OF NAMDEVCO FOR FRIDAY, AUGUST 9, 2002 FOR SELECTED FRUITS AND VEGETABLES FOR TRINIDAD'S MACOYA WHOLESALE MARKET COMPARED TO THOSE OF THE AVERAGE RETAIL PRICES.
CURRENCY IS DOLLARS US @ T\$6.13:US\$1.**

Commodity	Unit	Weekly Prices		Wholesale Average (US\$)	Retail Average (US\$)	Retail Markup (%)
		High	Low			
Breadfruit	kg	0.27	0.22	0.24	-	
Cabbage, green	kg	0.81	0.72	0.76	1.92	151%
Cabbage, white	kg	1.08	0.99	1.03	-	
Bitter melon, chinese	kg	0.90	0.81	0.85	2.01	135%
Christophene	kg	0.81	0.72	0.76	1.47	92%
Cucumber	kg	0.53	0.51	0.52	0.96	85%
Eggplant	kg	0.72	0.63	0.67	1.41	110%
Okra	each	0.03	0.03	0.03	0.04	31%
Plantain, green	kg	0.32	0.27	0.30	0.96	224%
Pumpkin	kg	0.29	0.25	0.27	0.73	170%
Pepper, sweet	kg	1.80	1.44	1.62	2.84	75%
Tomato	kg	1.26	1.08	1.17	-	
Long bean	bndl	3.26	2.94	3.10	1.99	-36%
Lime	100s	0.03	0.03	0.03	0.10	194%
Cassava	kg	0.38	0.34	0.36	0.73	103%
Eddoes, imported	kg	0.85	0.76	0.80	-	
Eddoes, local	kg	0.59	0.55	0.57	1.47	157%
Ginger	kg	1.26	1.08	1.17	1.96	67%
Sweet potatoes	kg	0.25	0.21	0.23	0.92	298%
Coconut	each	0.15	0.13	0.14	0.30	117%
Avocado	each	0.33	0.24	0.29	0.88	208%
Bananas	kg	0.45	0.36	0.40	0.94	133%
Orange	100s	8.16	7.34	7.75	-	
Papaya	kg	0.72	0.63	0.67	1.07	59%
Pineapple	kg	0.90	0.72	0.81	1.25	54%
Watermelon	kg	0.54	0.50	0.52	0.73	41%

TABLE 2. WHOLESALE PRICE FOR FISH AT THE MACOYA WHOLESALE MARKET, TRINIDAD, AUGUST 9, 2002.

EXCHANGE RATE: US\$ @ 6.13 TT\$/US\$.

Commodity	Unit	High (\$)	Low (\$)	Mean (\$)
Bachin (Bechine) <i>Sphyraena spp.</i>	kg	1.44	1.44	1.44
Bannan	kg	0.36	0.36	0.36
Blanche	kg	0.72	0.72	0.72
Bonito	kg	0.72	0.72	0.72
Brochet (snook) <i>Euthynnus alletteratus</i>	kg	1.79	1.44	1.62
Carite <i>Schomberomorus spp.</i>	kg	1.97	1.79	1.88
Catfish <i>Hexanemathichthys</i>	kg	0.36	0.36	0.36
Cavali	kg	1.08	0.72	0.90
Cro Cro (grunt)	kg	0.72	0.72	0.72
Kingfish	kg	2.87	2.69	2.78
Mixed fish	kg	1.08	1.08	1.08
Moonshine (moonfish) <i>Selene spp.</i>	kg	1.62	1.62	1.62
Redfish (red snapper) <i>Lutjanus spp</i>	kg	3.95	3.95	3.95
Salmon	kg	2.15	1.44	1.79
Shark	kg	1.79	1.08	1.44
Shrimp (medium)	kg	4.31	4.31	4.31
Shrimp (small)	kg	2.51	2.51	2.51
Tarpon	kg	0.54	0.54	0.54
Whitefish	kg	0.72	0.72	0.72

TABLE 3. RETAIL PRICES FOR SELECTED BRANDS OF SAUCES, SEASONINGS AND JELLIES IN FOUR SUPERMARKETS IN THE PORT OF SPAIN AREA, TRINIDAD, AUGUST, 2003.

PRICES ARE GIVEN IN US\$ @ 6.13 TT\$= 1 US\$.

Item	Brand	Unit of Measure	Lng Crclr Mall Tru-Value	Grnd Bzr Xtra	Maraval HiLo	Chaguanas Food Basket	Average
Green seasoning	Chief	gram	0.003			0.002	0.003
	Turban	ml	0.003	0.003		0.003	0.003
	Mabels	ml	0.002				0.002
	Matouk	ml	0.004		0.004	0.003	0.004
	Genuine				0.003		0.003
	Cooks Mate	ml			0.002		0.002
Grand average			0.003	0.003	0.003	0.003	0.003
Amchar	CND	ml	0.005				0.005
	Chatak	ml	0.002		0.007		0.005
Grand average			0.004		0.007		0.005
Hot sauce	Mabels	ml		0.002			0.002
	Matouk	ml		0.002			0.002
	Chief	ml		0.006			0.006
Grand average				0.003			0.003
Casareep	Les	ml			0.018		0.018
	Lil Ana	ml			0.010		0.010
Grand average					0.014		0.014
Jelly							
guava	Mabels	gram	0.004			0.003	0.004
	Matouk	ml	0.004				0.004
orange	Mabels	ml	0.004			0.003	0.004
	Matouks	ml				0.004	0.004
pineapple	Mabels	ml	0.004				0.004
	Matouk	ml	0.004			0.003	0.003
sorrel	Matouk	ml	0.004			0.003	0.004
Grand average			0.004			0.003	0.004

The Chaguanas Food Basket had only green seasoning. There is no achar, no casareep, few jellies and no fish.

ANNEX III

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).

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