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EXPORT MARKET OPPORTUNITIES

MARKET PROFILE:

BARBADOS

A RAPID RECONNAISSANCE SURVEY



EXPORT MARKET SERIES: BULLETIN NO. 4

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. 4

February 2003



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PREFACE

This publication is part 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 potential for various Guyanese non-traditional exports in a various 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 customs 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 can put exporters in direct contact with potential buyers, wholesalers and retailers in the importing countries.

The undertaking of these market surveys is a joint effort of the Ministry of Fisheries, Crops and Livestock; Go-Invest and the New Guyana Marketing Corporation (NGMC) to improve quality, increase production and promote exports. As a team, the three agencies are working on the problems, limitations, and constraints identified in the initial reconnaissance 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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BARBADOS

BACKGROUND NOTES

Barbados is the most easterly of the Caribbean islands. It is found east of the Windward Islands and 460 km miles northwest of Venezuela. By air, Barbados is 4 ½ hours from New York, 5 hours from Toronto and 8 hours from London. [Business Barbados Fast Facts Guide, 2002 ed. Caribbean Publishing Co, Ltd, Edgehill, St. Thomas, Barbados, West Indies (www.businessbarbados.com)].

The island is a relatively flat coral outcropping, whose highest point is 336 m above sea level. Barbados is approximately 34 km. long and 23 km. wide and has a total land area of around 430 sq. km. The ethnic mix is 92% African, 4% European, 1% Indian and Asian and 3% mixed. The official language is English. The permanent population is an estimated 267,400. Because an estimated 85% of the population congregates around urban areas, the population in towns is high. With an average of 621 persons/sq. km., it is one of the most densely populated countries in the world. Adding to this number are the tourists, some 507,086 in 2001 (Ministry of Tourism and International Transport, 2002). The peak tourist season is August/September through April/May. However, in August of 2002, there were very few stay-over tourists to be seen.

The major residential areas are clustered along the coastline. Major urban areas are found along the western coast (Saint James and St. Peter parishes) and the southern coast (Saint Michael, Christchurch and Saint Philip parishes). The capital is Bridgetown, which is the only major city with more than 50,000 inhabitants (FINTRAC, 2001).

Barbados possesses numerous attractive, small, sandy beaches and a pleasant tropical climate. The daytime average temperature ranges between 27-29° C. The combination of proximity, safety, pleasant climate and attractive beaches has served as a useful resource to promote Barbados as a desirable tourist destination. As a result of these promotional efforts, Barbados has been able to develop a large service sector around the tourist industry. Other important industries are financial services, agriculture and light manufacturing (Business Barbados Fast Facts Guide, 2002).

There has been an ongoing drought in Barbados and fresh water is limited. Water limitations and high labor costs have combined to reduce the attractiveness of low return agriculture as an investment in Barbados. Additionally, land appropriate for agriculture is limited and largely controlled by the government or by a few large remaining sugar cane producers.

The island has a long-standing democratic tradition and a strong commitment to law and order. Barbados is a founding member of the fourteen-member Caribbean Community and Common Market (CARICOM) and the Organization of Eastern Caribbean States (OECS).

ECONOMIC OUTLOOK

During the eight-year period from 1993 through 2000, the Barbadian economy enjoyed increased annual growth rates, low inflation and low unemployment. Between 1996 and 2000, the average annual growth rate was 3.1%.

In 2000, manufacturing and processed food sectors were adversely affected by increased regional and international competition and higher energy costs. Total manufacturing output declined by 0.4% for the second consecutive year, although garment and furniture manufacturing increased by 10.9 and 11.2%, respectively. Processed foods production declined by 5% for the second year and the output of beverages dropped by 4.2% (as compared to an increase by 5% in 1999). The declines occurred due to increased regional competition (most likely from Trinidad and Tobago) and the closure of a major soft drink producer (Country Commercial Guide, 2001).

The NTIS 2001 Country Commercial Guide projected growth for 2001 at around 2.0-2.5%, mostly due to continued, but slower growth in the tourism sector, which negatively impacted the secondary industries of construction, off-shore financial services and the wholesale-retail sector. During the same period, agriculture (mostly sugar and rum) also contracted. Industries dependent on energy were expected to experience a decline in growth due to rising energy costs. Additionally, demand for imports was expected to continue to remain strong in 2001 (Country Commercial Guide, 2001).

In 2002, the Barbadian economy continued to experience a deceleration of its economic growth rate. In the first half of 2002, total output was estimated to have declined by 3.2%, double the rate of contraction in 2001. Most of the decline occurred in the first quarter, 5.8%, compared to the second quarter, 0.3%.

Most of the decline was due to a severe slump in the tourism industry, which contracted by an estimated 9.5% due to a drop in long-stay arrivals (10.6%) and cruise passengers (6.3%). The loss of cruise passengers was the result of cruise line companies adjusting ship itineraries to avoid the losses brought on by a global economic slowdown. The number of visitors from the UK dropped by 15.8% due to the loss of chartered flights. The World Cup, which was held in Asia, is speculated to have diverted tourists away from the Caribbean. Fortunately, arrivals from the US increased by 4.4% over the same six-month period as a result of a strong marketing effort by the Barbados Tourism Authority and the arrival of a scheduled carrier, US Airways. The number of visitors from regional CARICOM nations dropped by 9.1%, with the singular exception of the number of visitors from Trinidad and Tobago, which increased 10% during the six-month period (“Economic activity drops in first half,” interview with Dr. Marion Williams, Governor of the Central Bank of Barbados, *The Barbados Advocate*, Business Monday, pp 10 and 11, August 5, 2002).

Tourism arrivals in Barbados, excluding cruise ship arrivals for the years 1999-2001.

1999	2000	2001
514,614	544,696	507,086

Source: Ministry of Tourism & International Transportation.

During the first six-months of 2002 the construction sector slowed by an estimated 8.3% as compared to declines of 1.8% and 0.4% in 2001 and 2000, respectively. The larger rate of contraction in 2002 is due to the completion of several private-sector projects and because there are few new projects on the horizon. The poor performance of both tourism and construction directly reduced output in mining and quarrying, wholesale and retail and other co-dependent industries (Barbados Advocate, 2002).

Agriculture performed poorly as well during the period. Sugar production dropped due to a reduction in the area planted and delayed harvest. Non-sugar output declined an estimated 2.6% due to decreases in fish catches and milk production that exceeded the modest increases in chicken and horticultural crop production (Barbados Advocate, 2002).

As a result of the poor economic performance for the first half of 2002, unemployment rose from 9% in 2001 to 10.3%. Loss of employment in agriculture, manufacturing and construction sectors exceeded job growth in the government, financial and business sectors, resulting in a net loss of 2,200 jobs (total employment of around 130,000 in 2001). So far, however, the inflation rate has not changed from 2.6%. Increases in the price of food, alcoholic beverages, housing, transportation, medical and personal care were counterbalanced by lower prices for fuel, light, clothing and household operations. (Barbados Advocate, 2002). Nevertheless, relative to the other developing nations in the region, the standard of living in Barbados is high, around US\$ 6,000 per capita income.

Exports declined by 8.9% during the first half of 2002. However, this was balanced by a decline of 4.5% in retained imports. The decline in imports is thought to be due to increased consumer caution and weak domestic economic activity, which resulted in a reduction in the demand for cars and imported machinery. (Barbados Advocate, 2002).

Imports provide Barbados with many basic products, including energy, food and most consumer products. The demand for these products is directly proportional to the fortunes of the tourism, financial services and construction sectors, on which the Barbadian economy is strongly dependent. These industries are very sensitive to the welfare of economies of other countries and the overall consumption demand for luxury vacations and investment opportunities. If those economies are not strong, then demand for the Barbadian services falls off and, in turn, demand for imports drops off in Barbados.

The Barbadian economy is not expected to recover until the first quarter of 2003. Current projections suggest a decrease in real economic activity of about 3% of GDP for 2002 (“Williams: Larger deficit expected”, *Barbados Advocate*, Business Section, p.7). Output

is expected to fall across most sectors. International financial turbulence and the weakness in the UK market segment suggest that tourism will continue to struggle despite the gains made in the US market segment. Manufacturing and non-sugar agriculture will have to continue to grapple with the stiff competition posed by the implementation of trade liberalization, although Barbados might implement the WTO safeguard mechanism to protect these sectors. Although the government plans to carry through with capital works investments in the Needhams Point Program and the expansion of the National Housing Corporations Housing Program, consumer and business caution is expected to counterbalance the public spending for a net zero growth in the construction sector.

The inflation rate for 2003 is expected to stay within the 2.5-3.0% range. However, unemployment is expected to continue to increase.

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

An understanding of the food sector's distribution chain is essential to understanding the practical possibilities for increasing imports of Guyanese fresh produce, frozen fish and seafood and processed foods such as condiments and sauces into Barbados in the near future. Therefore, the following information on the food sector is provided as context for marketing those products.

Consumer Trends

Due to the number of tourist visitors from the US, the flow of travelers between Barbados and the US and the widespread exposure to US products through cable television (nearly 85% of the households own a television), the Barbadian food trends tend to follow those of the US consumer. Barbadians prefer proven brand names; however, price, quality and habit also influence purchase decisions (2002 Gain Report).

The country is small (one can get from one end of the island to the other in less than one hour), the public transportation system is efficient and widely available and a large number of households own a car. For these reasons, geographic segmentation of the food sector is weak (FINTRAC, 1997).

There is a Guyanese community of some 25,000 (an estimate by Honorary Consul Norman Faria that includes legal and illegal immigrants), attracted to Barbados by the higher salaries, greater employment opportunities and a perception of greater safety. The Guyanese are dispersed geographically throughout the island, tending to live in areas where they can work, according to their specific skills, and they are employed in a wide range of occupations. Wholesalers (Sookhrams and the fish and seafood wholesalers) and retailers (Thorpes, Julie 'N, Big B, etc) on the island have recognized and moved to fill this niche market for ethnic Guyanese products. As the Guyanese community is not large, it would be very easy to saturate the market with food products. Also, it would appear

that there is some competition by different brands from other sources such as Trinidad and Barbados of similar or the same products.

Retail food stores are well dispersed throughout the island. Supermarkets are the most favored source of packaged food products. The upper social class purchases food in supermarkets since they value variety and service. The middle class shops in small supermarkets and convenience stores and the lower-income consumers typically shop at Mom & Pop shops and traditional outlets (Gain Report, 2002). Despite widely available transportation, people still prefer to shop at the closest food outlet available. Shoppers tend to shop once a week or less and while purchases are usually made in cash, both credit and debit cards are becoming more popular.

As most of agriculture on Barbados is limited to sugar cane, pork and poultry production, and some horticultural production, Barbados relies heavily upon imports to satisfy demand for food products. According to the 2002 Gain Report on the retail food sector in Barbados, \$131 million of food products were imported into Barbados in 2001, of which 70% were destined for the retail sector. As for the other islands in the region, food is a large portion of the cost of living in Barbados. In 2001, 39.4% of the 2000 GDP per capita, or \$5,713, was spent on food products, most of which are imported from long distances. Food is generally imported from the US, the UK, New Zealand (dairy and lamb), Canada and France (wines). The most important CARICOM suppliers are Jamaica and Trinidad.

THE RETAIL SECTOR

Retail outlets can be broken down into five categories: supermarkets, club outlets, convenience stores, gas marts and Mom & Pop stores.

Table 1. Breakdown of Store Categories and the Number of Outlets for Each as of 2001.

STORE CATEGORY AND NUMBER OF OUTLETS	
Supermarkets	25
Club outlets	1
Convenience stores	40+
Gas marts	18
Mom & Pop stores	125+
Wet markets	5
Produce stands	100+

Source: Gain Report #BB2003, updated in field.

Supermarkets

There were twenty-five supermarkets in Barbados as of 2001. In 2001, the retail market experienced the same sort of consolidation as that occurring globally. As a response to the threat created by the entry of both PriceSmart and Kmart, local stores have consolidated to improve efficiency and service. The most significant consolidation was that of: the two largest distributors, Spring Garden and MER Bourne; two of the largest supermarkets, Big B's and JB's; and the Super Centre Group chain, which consists of three supermarkets and a line of convenience stores, into a single conglomerate, Barbados Shipping and Trading Company, Ltd (BS&T). BS&T has also invested in PriceSmart-Barbados (See Table 2).

In response to the consolidation of BS&T fresh fruit and vegetable sales through PriceSmart, SuperCentres and JB's, the beleaguered Julie' N supermarket chain is now under new local ownership and is attempting to expand operations.

Table 2. Summary of Facts Concerning Supermarkets on Barbados, 2002.

Retail Name & Store Category	Ownership	No. of Outlets	Locations	Purchasing Agent Type
PriceSmart (club outlet)	Foreign and BS&T	1	Warrens	Own distribution for imports
Super Centres (SCG) (supermarkets)	Local (BS&T)	5	Christchurch Oistins Sunset Crest Rock Dundo	Distributor
JBs (SDCG) (supermarket)	Local (BS&T)	1	Sergeant's Village	Distributor
Big B(SCG) (supermarket)	Local (BS&T)	1	Christchurch	Distributor
Julie' N (supermarket)	Local	4	HaggattHall Rendezvous	Distributor
Budg' Buy (supermarket)	Local	4	Black Rock Harbour Road Michael's Row	Distributor
Jordan's (supermarket)	Local	3	Fitt's Village Baxter's Rd Speightstown	Distributor
Rick's (supermarket)	Local	1	Bridgetown	Distributor
Carlton's A One (supermarket)	Local	1	Black Rock	Distributor
Emerald City (supermarket)	Local	1	St. Phillip	Distributor
E. D.'s (supermarket)	Local	1	St. Joseph	Distributor

Source: Gain Report #BB2003, updated in field.

In 2001, the supermarket industry reported sales of over US\$200 million. The largest four retailers created demand for over 75% of the food imports and over 15-20% of the supermarket customers were tourists (many hotels have kitchenettes and some long-term tourists take short-term rentals of houses).

Large retailers have modern warehouses, whereas smaller supermarkets and the Mom & Pop stores continue to operate inefficiently, using obsolete distribution and logistical systems. Most supermarkets source imported products through wholesalers/distributors. Supermarkets are open from 8 am to 6-7 pm, Monday through Saturday, although some of the more competitive, larger chains are open as late as 10 pm. The small Mom & Pop operations generally close at 4:00-4:30 pm weekdays and at noon on Saturdays.

Of the large supermarkets surveyed (JB, Big B, Julie 'N, Jordan, Emerald City and Carlton's A One), JB Supercentre and the Big B Supermarket carried the widest range of fresh fruits and vegetables, many of which are of the type grown in Guyana. Almost all of these were pre-cut and packaged, bearing pricing labels with "Buy Barbados" prominently featured across the label. Big B has a large ethnic section with the types of seasonings and condiments produced in Guyana (a dark mango chutney that resembles achar, onion-based green seasoning and hot sauces), most of which are produced in Barbados, Trinidad, Canada and UK. Many of the Barbadian products were boldly labeled as "100% Bajan (Barbadian)" and "Produced in Barbados". Nevertheless, Big B does carry casareep produced by two different manufacturers in Guyana, "Guyanese Pride Pomeroy Casareep" and "Cooks Dit Cas" casareep. JB Supercentre also prominently displays signs and labeling with "Buy Bajan" and "local (grown)". The Montserrat pineapple in the fresh produce section was identified as "Guyana grown".

Julie 'N supermarket carries a wider variety of processed products that are like Guyanese products: green seasoning, hot sauce, but fewer vegetable products than Big B. Julie 'N also carries some of the fish favored by the Guyanese customers: butter fish and bangamary. Neither Jordans nor Buy Rite carry any of the ethnic seasonings or condiments. Jordan's carries few vegetables, mostly plantains and root crops of very poor quality. Buy Rite did not have any fruits or vegetable.

Convenience Stores, Gas Marts

Competition among convenience stores and gas marts is strong and the market strategy for this sub-sector is based on convenience and low prices. Nearly all imported products offered are purchased through wholesaler/distributors. The medium-sized convenience stores are also undergoing consolidation. Some are being bought up by the supermarkets and larger convenience stores and being modernized and enlarged to be more competitive.

Most convenience stores only carry dry goods, but some also offer fresh and frozen items. The convenience stores are located along the heavily trafficked roads and in congested urban areas and target the busy middle class, particularly the business sector.

The gas marts are located at busy intersections and on main roads. The number of gas marts is growing as the pace of life in Barbados increases. As supermarkets tend to close after 10 pm on weekdays and are closed on Sundays, the 24-hour service gas marts fill a niche that offers convenient meal options. Over 19 local franchises of three transnational gas retailers, Shell, Texaco and Esso; provide gas mart services. Distributors provide these retailers with food products.

Traditional Markets

Traditional markets include the numerous small, independent grocery stores (Mom & Pop stores) scattered throughout Barbados and five farmer's markets (Cheapside, Eagle Hall, Fairchild Street, Palmetto Mall and Six Cross Roads) and three fish markets (Oistins, Speightstown and Weston).

The facilities at some of the farmers markets are currently being upgraded. Cheapside is under construction in August, 2002. Activity at the Eagle Hall and Fairchild Streets markets was slowing as vendors prepare to move out of those facilities, which soon will be closed for modernization. Their modernization is planned to begin as soon as the construction at nearby Cheapside market is finished. The Palmetto Mall market is currently the busiest market. The markets are managed by the Ministry of Agriculture through the Manager of Markets, whose office is located at Graehme Hall in Bridgetown.

The public fish markets are found along the shoreline and generally appear to be clean and busy after the boats come in. The small, refrigerated trucks of the larger fish wholesalers such as Morgans, Lashley & Waite and Sundale receive deliveries of fresh, locally caught fish at these markets.

The Mom & Pop shops generally focus on dry and canned basic food goods. The few green grocery items that they might handle would include onions, potatoes, other roots and tubers and garlic. All of the dry goods are purchased through wholesalers/distributors as none of the Mom & Pop shops import. Due to the difficulty of recovering payment from such small retailers, importers usually prefer to work through an independent wholesaler rather than going directly to the smaller retailers.

One of the few Mom and Pop shops that carries Guyanese products is Thorpes Fruit and Vegetable, which is located across the street from Sookhram's on Suttle Street in Bridgetown. Thorpes has carried fresh Guyanese fruits and vegetables in the past but at the time of the field visit interview had only Barbadian product on the shelves. However, Thorpes does carry a full line of Majors seasonings including the hot sauce, green seasoning, achar and cake coloring. Also offered are the chow mein and vermicelli, monosodium glutamate, custard powder and Sari's green seasoning. According to the manager, she purchases dry good products occasionally on weekend buying trips in Guyana.

THE WHOLESALE SECTOR

Fruits and Vegetables

There are a number of importer/wholesaler/distributors of fresh produce in Barbados. Most of these are located in or around the cities of Bridgetown, Christchurch and St. Michael. Some are extensions of the supermarkets; e.g., Julie N' and Big B. Others are long-established wholesale traders in the region. Wholesalers tend to specialize in certain product mixes. Many only deal with dry goods and others may handle fresh f&v and/or frozen goods. Those handling f&v may only sell temperate climate products such as apples, pears, etc.

Specific information for each importer/wholesaler/distributor contacted who expressed interest, or who might be interested in products from Guyana is available at NGMC or Go-Invest.

A comparison of the prices for selected fruits and vegetables at the retail, discount green grocers and open-air market in Bridgetown for August 2002 are also available at NGMC or Go-Invest. In general, the retail prices are fairly consistent among supermarkets for most of the products that are locally or regionally sourced. There seems to be much more variation in prices for the imported products. In general, however, the retail market prices tend to be marked up by around 25% above the discount green grocer market. There seems to be a mix of bargains and losers in the open-air market when compared to prices in the large retail supermarkets. For those products priced below the retail level (mostly roots and tubers) the retailer markup was around 33%. Terminal market products priced above the retailers tend to be horticultural products that may not be grown locally, such as christophene (chayote), and fruits (avocados, watermelons).

The reason for the variability in the pricing of the products in the open-air markets appears to be due to wholesalers supplying vendors in those markets with products not grown locally. As these are imported and sold in small lots, the price tends to be higher for these products. Stall vendors increase the price up to include their own costs and markup. Importers may also vend these products themselves in the public market. The result is that, in general, prices for imported goods in the open-air market are higher than the supermarkets, which can negotiate volume discounts. Some of the Guyanese exporters reported having and were reported to have stalls in at least one of the five open-air markets in Barbados.

Fish and Seafood

There are several fish and seafood wholesalers in Barbados, at least three of which import Guyanese products: Lashley & Waite, Morgan's Fish House and Sundale. A more complete list of seafood wholesalers is available from NGMC and Go-Invest. These are three of the largest seafood wholesalers on the island and all three compete for the same clients with pretty much the same products. They vie for sales to the supermarkets, small

seafood and fish shops, restaurants and hotels. Lashley & Waite and Morgan's Fish House have a fleet of small, refrigerated trucks that pick up and deliver product to customers around the island. The largest supermarket customers are the SuperCentre and Julie 'N chains. Some of the wholesalers also have their own retail shops as well. According to Hon. Consul Faria, another enterprise, Goddards, is packing shrimp in partnership with Viera Investments of Guyana.

The distribution channels for fish and seafood are essentially the same as for fruits and vegetables (i.e., via wholesaler/importer/distributors to retailers-supermarkets, hotels, restaurants, etc.), the major difference being that the major wholesalers of fish are generally different from those of fresh f&v. Due to the similarity in the products, the volume of seafood sales, as for fresh f&v, tends to rise and fall with the "fortunes" of the tourist trade. Decreasing sales due to the drop in tourist arrivals has resulted in increased competition with a tendency towards price war tactics.

Although when interviewed, wholesalers expressed satisfaction with the quality of Guyanese fish that they were receiving, they were pessimistic about increasing the volume of imports due to the current economic situation (depressed sales) and high level of competition among the several seafood importers. They all tend to sell to the same retailers, for example. Transportation of product from Guyana was cited as a problem by one wholesaler who explained that, although there seemed to be little trouble in receiving reefer containers of fish, receipt of fish imported by air shipments was sometimes delayed. One wholesaler complained of delays of up to two-three weeks between placing orders with a Guyanese supplier and receipts of shipments by air, which he found to be an unacceptable delay.

Nevertheless, wholesalers report that sales volumes of bangamary and butterfish, neither of which are fished locally nor currently imported from Guyana, are increasing as price-conscious housewives become more familiar with these fish. Around 15% of the fish sold by Morgan's Fish House is from Guyana, much of which is bangamary and butterfish. These fish can be found in the frozen meat section of some of the larger supermarkets such as Julie 'N and JB Supercentre. One of the fresh produce importers, French Trading Company, expressed interest in experimenting with sales of bangamary and butterfish.

A comparison of the prices for selected fish at the retail and open-air fish market level and wholesale prices FOB Georgetown can be found in Annex II. As neither bangamary nor butterfish are fished locally, they are not offered in the open-air markets and are only found in supermarkets. For this reason, the only prices that can be provided for them are the retail prices.

There seems to be some interest in value-added fish and seafood products such as salted fish and fish patties and sausages. Also, both Morgan's Fish House and the French Trading Company expressed interest in the prospect of the import of shrimp from Guyana.

Sauces, Seasonings and Preserves

A study of the supermarket shelves indicates that supermarket clients favor many of the West Indian flavors familiar to Guyanese consumers. Hot sauces, green seasoning, casareep, mango chutney, kouchella and achar are available, although maybe not all in one supermarket. In addition to the hot sauces there were a number of jerk seasonings available. Condiments and sauces are sold by local processors directly to retailers without middlemen. However, in the case of importers, importer/wholesalers are usually used as distributors.

As mentioned previously, Thorpes has the full selection of Guyanese condiments and sauces. The owner noted that Bajans are not familiar with all of these products and may need instructions on their use.

Brands of green seasoning seen in supermarkets in the Bridgetown-Christchurch area include: Golden Delight, Matouk and Fordes Homemade.

A large number of hot sauces are available in Barbados. Julie 'N at the Julie 'N Complex carries some 20 brands of hot sauce. Brands of hot sauce seen in supermarkets in the Bridgetown-Christchurch area include: Country Boy, Jay's Super Blend Pepper Sauce and Delish Bajan. No Guyanese brands were on the shelf, however.

Casareep is sold at Big B in Worthing. Big B carries two brands: Guyanese Pride Pomeroon Casareep, which is imported by Bedesee Imports from Toronto, Canada and Cooks Dit Cas produced by FAM Marketing, Guyana.

Retail prices for a sample of these products are provided in Annex II.

JEWELRY

Although we had determined not to include the jewelry as a product to investigate due to limited time and the expertise required for a thorough investigation of the market potential, because Honorary Consul Norman Faria provided the following contacts, I decided to learn something of the current market in Barbados to determine if any obvious opportunities or problems might present themselves.

Most of the jewelry stores in Barbados appear to be large chains catering to the tourist trade. The largest are Colombian Emeralds International, Diamonds International, Correia's, Luna Jewelers and Kings. A visit to any one of their showrooms quickly provides an indication of their marketing strategy: high quality, certified products that fully guarantee the buyer of good value for his money, with a duty free discount. Their products are differentiated on the basis of emphasis on certain types of stones, innovative design, settings, etc.

Other jewelry retailers include Little Switzerland, Cave Shephard and Jewelers Warehouse. Little Switzerland, besides fine watches and luxury knick-knacks also sells a variety of gold jewelry. Jewelers Warehouse sells a variety of products and advertises rock bottom prices for merchandise that is fully guaranteed. Cave Shepherd, on the other hand, is a large department store chain that retails some jewelry.

The Honorary Consul, Mr. Norman Faria, has been in contact with Correia's, Luna Jewelers and Kings and suggested that I start with these jewelers to understand the prospects for Guyanese stones and gold.

Interviews with three of the smaller jewelers: Luna Jewelers, Kings and Correia's confirm the observations made by reviewing their advertisements and/or by visiting their shops. All three immediately affirmed their dedication to high quality products and their need for reliable suppliers with the same standards. The representatives of all three contacted stated that the samples of diamonds and other semi-precious stones from Guyana that they had been shown were not of the quality that their marketing and pricing strategy demands. Diamonds were described as being of lower carat than their usual product, often with flaws that reduced their value. Also, they reported that the cutting of the diamonds was often of poor quality with too many asymmetrical and unequal sized facets and poor cuts. Coloured stones, such as amethysts, were described as often lacking the intensity or color that the jeweler required.

Kings Jewelers was the only jeweler for whom the buyer expressed interest in Guyanese products, perhaps due to existing connections with Guyana. However, the type of products that were proposed to be made from them: agate paperweights and clocks and less costly "costume" jewelry from the semi-precious stones and the target market- local buyers and lower budget tourist, underscore the low value attached to the Guyanese stones.

Gold from Guyana is suffering an image crisis as well due to the activities of smugglers selling what was supposed to be high quality Guyanese gold. One of the jewelers contacted indicated that apparently some buyers were defrauded when they bought gold products, which were not of the carat that they were purported to be by the sellers, who then decamped. In response, efforts were increased by the Guyanese Customs Anti-Narcotics Unit to crack down on smuggling and the Guyana Bureau of Standards set a 12-carat minimum on Guyanese gold, which must bear a stamp. Explanations and reassurances were made to the Barbadian gold and jewelry traders through various means. However, the jewelers contacted in Bridgetown were reluctant to discuss purchasing gold products from Guyana (from article in local newspaper provided by Mr. Faria).

No effort was expended in attempting to acquire either wholesale or retail prices for jewelry as the value of jewelry is unique to each piece due to differences in weight, size, color, perfection of stones and the quality and workmanship of the settings. Assessing the real base value of jewelry requires an appraisal by experts.

LUMBER AND WOOD PRODUCTS

Lumber

In 2000, Barbados imported an estimated 8.5 million kg of sawn timber valued at EC\$15.7 million (US\$5.8 million). Of this, the two woods imported in the largest volumes were pitch pine and greenheart, 3.0 million kg and 2.82 million kg (roughly 138, 40-ft container loads @ 20,411 kg/load), respectively.

Imports of greenheart into Barbados were reported as originating in Guyana, Trinidad and Tobago and the UK. The reported import value per unit imported for greenheart is EC\$1.15/kg (US\$0.43/kg) (Williams, 2002).

Other important sawn timber categories, listed in order of volume imported, were: "Other wood" sawn and chipped lengthwise, "Other coniferous wood sawn or chipped lengthwise, Caribbean Cedar, Mahogany, Mora, Other wood" sawn and chipped lengthwise, Oak, and Other Virola Mahogany.

There are only three or four large-scale wholesaler/retailers importing lumber into Barbados, including Caribbean Trading and Geddes Grant.

Caribbean Trading imports and wholesales greenheart, purpleheart, mahogany and pine into Barbados and other destinations. Over the last ten years there has been a lot of construction in Barbados and the demand for lumber increased during that period. However, over the next two-three years the remaining large projects will be finished and there do not appear to be any more large, new projects in the planning stage. Demand for lumber has begun to drop off and the Barbadian market is full. The owner, Mr. Persaud, expects that lumber purchases will be more related to maintenance and repair in the near future. Historically, sales of lumber tend to pick up in the summer months of April-November.

In addition to the declining demand for lumber in general as construction starts slump, demand for greenheart for housing and structural and marine construction seems to be declining as builders substitute marine treated pine, which is more readily available, more easily worked, cheaper and reasonably durable. The pine is kiln dried and there is little loss due to warpage. Most greenheart from Guyana is not kiln-dried and there is always some loss as the wood may be ungraded or poorly graded and arrive with warping and warp more after arrival. Mr. Persaud quoted a landed price of US\$480-600/1,000 bdf. for US yellow pine as compared to US\$650+/1,000 bdf., plus freight, for greenheart. Orders for wood from Guyana require a long lead time or carrying a large inventory, which results in higher inventory costs which must be passed on to the client.

As an aside, he mentioned that red cedar is in demand at the present time but he feels that the wholesalers are pricing it so high that they will kill the demand for it in the present slow market.

Retail sales of greenheart and purpleheart can be found in a few of the hardware and building supply stores. In addition to dressed lumber, some value-added products are available such as crown molding, quarter rounds, banister railings, cabinet doors and doors. Geddes Grant offers a wide selection of these value-added purpleheart products.

In general, but not always, retailers price purpleheart at a slightly higher price than greenheart. Geddes Grant offers dressed greenheart at BB\$3.70/sq.ft (US\$1.87/sq.ft) and purpleheart at BB\$4.00/sq.ft (US\$2.00/kg). However, Newtons offers both dressed greenheart and purpleheart for BB\$24.00 (US\$12.12) /2x4x10 = ~BB\$ 3.70/sq.ft (US\$1.87/sq.ft.).

In addition to the imports of greenheart and purpleheart there are other tropical hardwoods from Guyana that could be promoted in Barbados as value-added products. These could be used for architectural and esthetic uses such as lightweight ceiling panels, decking for boats and yachts, furniture, etc.

Wood Products

Other miscellaneous wood products currently of importance that are imported into Barbados include “wood of non-coniferous species, treated with paint, stains, or creosote,” and for “strips and friezes for parquet floor, not assembled” and wood scrap and waste and charcoal. Total import volume of these products in 2000 was reported to be 2.61 million kg and have a reported value of EC\$5.76 million (US\$2.13 million).

Total value reported for imports for 1999 was BB\$ 31.7 million (US\$16 million) as compared to exports of BB\$1.3 million (~US\$657,000) for the same year. The category with the greatest import value reported, almost BB\$23 million (US\$11.6 million) was for wooden furniture, which includes chairs and chair components, beds, mattresses, office, kitchen, bedroom and other furniture and bamboo and cane furniture. The second category, in terms of value (BB\$ 19 million or US\$9.6 million), was “Wooden Products,” which includes: furniture components, windows, doors, shingles, wood panels, tables, brooms, handles for brooms and tools, wooden boxes and pallets, shakes, parquet panels, tools, wooden paving blocks, templates, and “other” items.

The total value reported for imports of wood products in 2000 was BB\$17.69 million (US\$8.9 million). The category with the greatest value was bedroom furniture (BB\$6.3 million or US\$2.3 million), followed by office furniture (BB\$4.39 million or US\$1.63 million), kitchen furniture (BB\$3.33 million or US\$1.23 million) and seats with wooden frames (BB\$2.32 million or US\$860,000).

Many of these products were imported over this period of time to supply the boom in house and resort building and for GOB infrastructure development projects.

With respect to the furniture sector in Barbados, as of December 2000, there were 38 establishments engaged in the furniture trade. Products handled by these firms include wooden, metal, plastic and rattan furniture. Of the 38, only 2 were relatively large in size,

employing 50-200+ employees. The majority of companies, 58%, were small, employing 1-10 employees (Barbados Small Business Development Center, “Industry and Product Profile: The Furniture Sector,” 2001).

Revenues from Barbadian exports of furniture declined gradually from 1997 through 2002 from sales of BB\$2.0 million (US\$1.0 million) to BB\$0.8 million (~\$US\$404,000). The major markets were St. Vincent, St Kitts/Nevis and St. Lucia. Most of the products were bedroom and office furniture (Barbados Small Business Development Center, “Industry and Product Profile: The Furniture Sector,” 2001).

IMPORT REGULATIONS AND REQUIREMENTS

For more complete information on the regulatory environment of Barbados for food and agricultural products, I would recommend reading the 2002 FAS Gain Report “Barbados Food and Agricultural Import Regulations and Standards Country Report”.

Plant diseases and pest standards are controlled by the Plant Pest and Disease (Import Control) Act of 1995 and its implementing regulations, by controlling plant products importation. Both legislative acts are enforced by the Ministry of Agriculture’s Veterinary Service and Plant Quarantine Unit.

Because of the pink mealy bug (*Maconellicoccus hirsutus*) infestation in Guyana in the mid-1990s, new procedures controlling the exports of fresh produce from Guyana to Barbados were put in place. Farms whose crops are produced for export for Barbados must be certified as pink mealy bug-free by Guyanese inspectors. Intermediary/exporters are supposed to source their export products exclusively from these farms. Produce to be exported to Barbados must be packed in the government-approved and controlled packing shed in Sophia where it is inspected by government inspectors and given a phytosanitary certificate. This protocol has been developed jointly by the Barbadian and Guyanese governments to protect the flora of Barbados from the introduction of pink mealy bug from Guyana while permitting imports of f&v from Guyana. When contacted, a representative of the Plant Quarantine Unit expressed satisfaction with the current system that is in place.

The Pesticide Control Board is responsible for registering and monitoring pesticide use in Barbados. The Board is comprised of representatives of the Ministries of Agriculture, Health and the Environment. The Board recognizes the Codex Alimentarius for the maximum pesticide residue tolerances. The Ministry of Agriculture Veterinary Laboratory and other government laboratories conduct testing, but as resources are very limited, testing is minimal.

Importation of animal by-products are controlled by the Animals (Diseases and Importation) Act, Cp. 253 of 1951 and its implementing regulations. No fresh or frozen red meats from Guyana are allowed entry into Barbados for sanitary purposes. Only

canned or cooked meats are allowed. There are no concerns on the part of the Veterinary Service concerning fish and seafood products.

Lumber must be accompanied by a phytosanitary certificate and/or a certificate of fumigation.

The Control of Standards Act of 1983 provides the legal basis for the standards for most foods. The “Specification for Labeling of Prepackaged Food”, Barbados National Standard 5: Part 2 of 1994 regulates labeling for packaged foods. Standards Inspectors of the MCCABD are responsible for enforcing the food standards and regulations of the Barbados National Standards Institute (BNSI) and the MCCABD.

As a member of CARICOM, Barbados is participating 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 and its headquarters will be in Barbados and the current director of the BNSI will be the first president of CASQ. 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, Barbados will apply its own standards. A list of those standards may be acquired from the BNSI.

CUSTOMS DOCUMENTARY REQUIREMENTS

Food imports require the following documents:

- Certificate of origin
- C 60 form
- CARICOM commercial invoice
- Bill of lading or airway bill
- Declaration form (C63 form)
- Packing list
- Phytosanitary or Veterinarians’ certificate, as appropriate

The Gain Report states that customs clearance of food imports is usually straightforward and takes about three to five days. However, if there is a delay in scheduling the appointment for the Customs inspection, which apparently happens frequently, then overtime fees must be paid by the importer. Plant produce, live plants, fruit and seeds must be accompanied by a phytosanitary certificate.

Lumber and wood products must be accompanied by a phytosanitary, fumigation or disinfectant certificate.

If there is a dispute over rejected product, an appeal can be made to the Comptroller of Customs of the Barbados Customs & Excise Department.

Although all goods imported into Barbados from CARICOM countries are exempt from payment of import duty, they are subject to an Environmental tax, Excise tax and Value-added tax (VAT). The import levy is paid on the cif (cost, insurance and freight) value of the goods imported. The environmental levy is a fixed amount or a percentage of the Customs value of the goods. The Excise tax is levied on the number or weight of the items imported or the chargeable value depending on the goods. The VAT is expressed as a percentage of the aggregate of the Customs Value, Import duty, Environmental Tax and the Excise Tax.

Duties and taxes are usually paid by the importer, but the exporter may accept that responsibility. There are no stamp duties nor consumption taxes charged on imported goods. The list of duty and tax rates applicable to commodities are the Customs Tariff, Environmental Levy Act, Excise Tax Act and the Value Added Tax Act. All of these pieces of legislation may be purchased from the Government Printing Department, Bay Street, St. Michael.

OPPORTUNITIES AND CONSTRAINTS FOR GUYANESE PRODUCTS IN THE FOOD SECTOR

MARKET ATTRACTIVENESS

Before discussing the details of identifying specific products with promise and listing the opportunities and constraints for those products (business strength analysis), it would be wise to examine the attractiveness of Barbados as a whole as a market. Successful marketing strategies are based on matching the attractiveness of a market to the business strength of the producer to identify and develop a successful marketing strategy.

Up until 2001, Barbados demonstrated characteristics of an attractive market for food products, lumber and jewelry due to its relatively large population and purchasing power for the region, the growing tourist industry, increased investment in housing and infrastructure, reliance on imports for food and lumber and relatively low barriers for entry. However, recent worldwide events have changed in such a way as to alter the attractiveness of Barbados and to require a shift in marketing strategy, if only temporarily.

The recent trend in the performance of the Barbadian economy is described in detail in the background section at the beginning of this report. The general depression in the economies of the principal geographic markets that provide Barbados with most of its income: Europe, specifically Great Britain; Canada and the United States; has begun to reduce the demand for Barbadian labor, resulting in a contraction of the Barbadian economy. It is unlikely that the Barbadian economy will experience a rebound until sometime after the economies of its principal markets improve. The tourism sector, one of Barbados' most important sources of GDP, has also been affected by the increased

sense of insecurity worldwide due to the increased number of terrorist attacks as well as some internal problems with the management of the industry. Poor economic performance will also negatively impact the inflow of cash remittances from family members working abroad, thus depressing the purchasing power of those Barbadians supplementing their income with remittances.

As the number of employed in Barbados drops and personal income declines over time, end consumers will begin to buy fewer luxury items, engage in product substitution and bargain hunt for lower prices. This will result in bargain hunting and a shift in product mix by the intermediaries as well as they chase the changes in consumer spending. This will be more marked as the length of the recession is extended, with the magnitude of the loss in GDP and the expectations of consumers for an improvement in their economic condition.

The statements made by some of the intermediaries concerning the drop in demand for some food products, increased demand for the less expensive fish such as bangamary and butterfish, concern over overpricing of products (red cedar) and increased use of pine instead of greenheart and the tendency to price wars (fish and seafood) suggest that this may already be occurring.

Also of consideration, the sales of all of the products that are under consideration are cyclical as their demand is ultimately derived, in large part by the tourist trade, which is cyclical.

The Barbadian market, at this time, under these conditions, for these products, is generally moderately (food products, jewelry) to weakly (lumber) attractive.

BUSINESS STRENGTHS AND WEAKNESSES

Specific Product Strengths

Fresh Produce

- Barbados lacks the conditions that enable it to be self-supporting in agriculture, particularly for food items that require large growing areas; i.e., tree fruit (avocado, soursop, citrus) and field and plantation crops (pineapples).
- Ethnic foods are products for which consumers tend to be highly selective and very loyal and so long as Guyanese continue to immigrate to Barbados, the demand for those products will remain stable.
- This is a product for which there is relatively large demand in Barbados.

Jewelry

- Barbados does not produce the precious metals or stones used in its jewelry trade and so, must import the gold, stones and jewelry sold in Barbados.

- Jewelry has the advantages of being a very high value-added, labor-intensive end product that is durable and of a non-perishable nature and requires little space, which reduces transportation cost/unit and losses due to spoilage or damage to a minimum. However, jewelry shipments require greater security than many other products.
- At least two jewelers found on Barbados have stores and/or family connections in Guyana. These contacts should be used, if amenable, to develop the trade.
- Does Guyana have stones of internationally recognized quality and value or not? The jewelers contacted indicate that the stones that they have seen from Guyana are not good quality. Is this true of all stones mined in Guyana? If not, perhaps this perception could be overcome by instituting minimum quality standards and certification of stones to guarantee quality. What are the barriers to expanding the industry by importing good quality stones from neighboring South American countries for cutting and setting by Guyanese jewelers who are members of a guild that sets high standards and safeguards quality?
- Gold quality is being better-controlled and monitored through higher standards set by the Bureau of Standards, quality assurance created by the requirement of the quality stamp or seal and increased activities of the Customs Anti-Corruption Unit.
- Guyana has a large, low wage labor pool.

Lumber

- Barbados is not able to grow significant volume of timber to satisfy internal demand.
- As greenheart and purpleheart are very dense woods, their use in construction of homes and value-added products such as doors and flooring will be less attractive in Barbados where the hourly cost of labor is high. This provides an opportunity in Guyana to produce value-added products such as custom home building kits, paneling, pre-drilled and pre-cut paneling, crown molding, flooring, decking, door and window sills, windows, doors, cabinetry, etc.
- Guyana has other woods with good properties that lend them useful to a variety of architectural applications: lightweight wood for ceiling and wall panels, durable woods for boat decking, etc.

Constraints

General constraints and threats

- The poor image of Guyanese vendors and products in Barbados due to prior experiences with unscrupulous vendors fraudulently peddling substandard or bogus products.
- Smuggling, which undercuts the prices of legitimate vendors, damages the image of Guyanese products and vendors, defrauds the Guyanese public by avoiding taxes which revenues could be used to develop much needed infrastructure and generally gives the image of the Guyanese people as corrupt and untrustworthy, which scares away both investment, which hinders growth of the economy, and potential buyers, which reduces revenues and thus hinders growth of the economy.
- Low degree of professional management of small and medium-sized enterprises (point out that the successful enterprises that sell noodles, etc do not have image problems in the exterior) that leads to unprofessional business conduct.
- Small and medium-sized business owners and managers have insufficient training and education to expand these enterprises rapidly due to an inability to cope with the increased number of complex business management decisions that they must make that require a formal accounting system and good understanding of cost control, pricing and economic trade-offs, marketing strategy and client management, supervision and quality control of products.
- Cash flow is restricted and because of lack of capital assets and the ability to prove a reliable potential for success. Small and medium-sized businesses may not qualify for loans needed for capital investment to expand production.
- For all products, there is insufficient promotion at point of sale to increase demand for product.
- Some producers are too small to export or to expand their current level of output without logistical, managerial and financial assistance.

Specific Product Weaknesses

Fresh Produce

- The two-year hiatus in shipping produce caused by the pink mealy bug infestation in Guyana has resulted in the loss of market share for fresh produce, particularly for pineapples. Not only did the buyers lose contact with Guyanese suppliers but they also discovered alternative suppliers who provided them with better service and more and better quality products.

- Transportation is one of the most difficult, and binding, obstacles to overcome due to the:
 - High cost of transportation, which makes the product less competitive
 - Lack of regular service of refrigerated containers, which makes meeting scheduled deliveries and providing better service to the customer impossible,
 - Long interval between shipment and arrival of product by sea, which results in poor service to client and
 - Unreliable and restricted volume of air cargo service, which is a constraint to expansion of sales volumes.

- Shorter shelf life, high spoilage rate and loss of quality and freshness of produce due to poor post-harvest handling from harvest to packing station as a result of:
 - Poor system of internal transportation,
 - Poor packing facilities and
 - Poor quality and inappropriate packaging.
- Small farm size and low population of certified farms are a barrier to increasing the size of shipment volumes, which is needed to reduce the cost of transportation per unit and increase sales volume.

- Government assistance has been insufficient and too slow to improve infrastructure (roads, the certified packing facilities) in time for exporters to recapture market share lost due to the pink mealy bug ban or to increase their capacity and reduce costs so as to become more competitive.

- There is no system of providing product quality assurance and payment dispute intervention (food inspectors in Barbados, arbitration, business advice) for the Guyanese exporters nor for the Barbadian importers.

Fish and Seafood

- Packing facilities in Guyana are not sufficiently hygienic to meet standards of US, Canada or Europe or the Codex Alimentarius for export sales; some are definitely substandard.

Sauces, Seasonings and Preserves

- Containers are inappropriate in size, are of poor quality, restricted in selection of size and strength, too expensive and not readily available.

- The labeling on packaging is unattractive or uninteresting and provides insufficient or no information for use by first-time buyers.

- Some of the facilities of small processors are unhygienic.

- If taken seriously by Barbadian consumers, the “Buy Bajan” campaign is a threat to imported competing brands as there are a number of Barbadian-produced brands in this category.

Jewelry

- Smuggling and gold debacle has injured image in Barbados
- The disparity between high standards of buyers who target the high quality-high value market segment and the perceived low quality of Guyanese products is wide.
- Cheap, high quality synthetic, laboratory created and color enhanced stones are creating greater competition for low quality, natural, semi-precious and precious stone in the low-budget segment of the jewelry market.
- In order to produce better quality cut stones, there must be more investment in training, tools and quality control.

Lumber

- The worldwide lumber trade is currently experiencing a glut of pine and other softwood products (Wall Street Journal, October 21, 2002) and it is expected to take several years to work down the excess capacity. Excess inventory for these products will be aggressively priced and marketed for some time to come, increasing competition for other similar construction grade lumber products.
- New treatments that provide protection from decay and damage associated with use near salt water will and are resulting in the substitution of treated pine for the more expensive and harder to work greenheart as a construction material in marinas and for wharves. Also, it would seem that the majority of new buildings in Barbados are being built with cement and concrete block rather than wood. New wharves are being built with concrete products instead of wood, as well.
- Because greenheart and purpleheart are very dense woods and hard to work, their use in construction of homes and other buildings will become increasingly less attractive in Barbados where the hourly cost of labor is high.
- With the exception of one or two operations in Guyana, wood is generally cut, sawn, dressed and sold green without kiln drying. This results in increased transportation cost as part of the weight being shipped is water, not wood, and in unnecessarily high losses after shipping due to warping, resulting in higher transportation cost per unit of marketable wood.
- Other tropical hardwoods from Guyana with good working properties are not being vigorously promoted by the Guyanese industry so as to increase the market share of Guyanese wood products in Barbados and on the world market.

MARKET STRATEGY

Short Term Strategy

Given the current, hopefully temporary, weakening of the attractiveness of the Barbadian markets for these products and a moderately weak competitive position of Guyanese products in their respective markets, the following are the generally recommended options until the rebound occurs:

- Protect existing strengths,
- Invest to improve position only in areas where the risk is low,
- Look for ways to expand without high risk and
- Focus on improving operations; i.e., increasing efficient use of resources and strengthening position with the buyers.

Given the magnitude of the affect of the marked cyclical nature of tourism on demand of consumable products, all efforts to expand supply should be planned well in advance of the tourist season, between April and November, and executed in November as the population (and resulting demand) swells with the influx of tourists in late November.

Now, more than ever, consumers and intermediaries will look for the best quality product at the lowest price. Those products that can be produced at a cost that enables pricing at a level that is attractive to the intermediaries in Barbados, especially in comparison with competitor prices, will gain market share.

To take advantage of the emphasis on low cost suppliers, it will be necessary to analyze the costs of production, internal transportation, packaging, marketing and transporting all of the products to buyers in Barbados to determine which products have real potential for a positive margin in the current and short term economic climate of the target markets.

For f&v, efforts should be made to improve competitiveness of exporters by: organizing production through scaled planting and increasing the total production volume through farmer training and better production technology to increase yield/area and certification of more production area; improving the quality of fresh produce upon arrival in the market by improving conditions at the packing house, finding cheaper, stronger boxes; continuing to educate and train the packing crews and the exporters and assisting exporters in improving the management of their product and their business.

For the jewelry industry to maintain its current position, efforts to recapture and strengthen the image of Guyanese jewelry as high value products are essential.

The lumber industry must move more quickly to catch up on the international trends in value-added production. More investment in technology and training is needed, particularly in the development of the less well-known tropical hardwoods.

Long Term Strategy

Investors with a long-term view would work now to remove the obstacles for those products that will have the greatest demand when the worldwide economy recovers and the Barbadian market recovers. Any strategy for increasing the marketing efforts for exports should be preceded and supported by strong efforts to improve production capabilities to increase efficiency and yields of high quality products. Export markets are highly competitive. They require efficient production of low cost, high quality products all year-around for long-term success.

Fresh Produce

At the present time it seems that there is a good market in Barbados for fresh f&v, if the product quality is good and the price is right for the intermediary. Guyana has the great fortune to possess the land and water resources that lend enormous potential for a strong agricultural industry. However, the many obstacles to production and export of agricultural products enumerated above are holding Guyana back from realizing its potential.

A national production strategy that coordinates regional production of horticultural crops is needed. It should be designed to meet the objectives of a marketing strategy developed with a long-term view.

Red meats

Uncooked red meats are banned from import into Barbados on the basis of sanitary issues. Whether or not these diseases can be eliminated from the Guyanese herds, ranches and abattoirs certified as disease-free to the satisfaction of the Barbadian Veterinary Services or the meat treated so that it can be certified as disease-free are determinations to be made by the respective Veterinarian Services of the two countries. Any work towards removing the ban would require a cooperative effort of the two Services.

Jewelry

If Guyana indeed possesses stones and gold of a quality that meet or exceed standards of international certifiers and retailers, then there is potential for expanding that industry to promote exports of jewelry to the international retailers. From the comments received from various quarters, it appears that there is a need to improve the mining and cutting of stones. Clearly, much attention must be given by the government to restore and maintain confidence in the quality of the products coming out of Guyana to safeguard the future of the industry, including cracking down on smuggling of stones and gold and peddlers of bogus, substandard products abroad.

Once again, the emphasis initially should be on developing the labor skills and technological power to mine and produce high-quality precious stones and metals and produce value-added jewelry to supply jewelry retailers with high-quality, reasonably

priced products. Although many jewelry retailers abroad now offer jewelry made with natural, synthetic and laboratory-created stones, natural stones of good quality still command high prices.

Lumber

It would appear that, because of its basic cost and the labor cost to work it, the market for greenheart is going to evolve from a demand for raw materials (logs) and lightly-processed (sleepers, posts and dressed lumber) to demand for products with more value-added (kiln-dried flooring, decking and custom cut and pre-drilled items such as railing, banisters, panels, etc) from the production areas. Purchasing value-added products directly from Guyana, should lower the cost of the end product by reducing the cost of losses incurred from warping during transportation and storage and spoilage during product transformation. Kiln-drying would also lower losses due to warping and reduce transportation costs by reducing the percentage of water in the wood before shipping, thus lowering its weight/volume. Value-added products also lower the labor costs to the end user, which makes such a product more competitive.

More emphasis should be placed on developing and promoting the use of other woods of Guyana and for other wood products, particularly by-products of value-added processing which can be used to produce items such as charcoal, bark chips, wood chips, etc. The physical and working properties of these other Guyanese woods are probably known. Effort should be made in researching and developing new products from these woods for uses in furniture-making, building construction and structural uses. Architects, craftsmen and builders should be involved in this process of discovery and development and to help promote and market the new products developed to other users in their own trades and crafts.

OTHER PROSPECTIVE PRODUCTS

Fruit juices, pulp, puree and concentrates

During the consultant's brief stay in Barbados there was not enough time to explore the possibilities for these products, but fruit drinks seemed to be in high demand in Barbados. In recent years, the demand for exotic tropical fruit juices has increased, most likely due to the increased number of tourists exposed to these new flavors. Many tourists equate the "tropical experience" with exotic fruit drinks and desserts (sitting under a palm tree with an exotic tropical fruit rum punch is a classic fantasy). Soursop, cashew apple, banana, mango and mamey zapote purees can be blended into ice creams and sorbets for restaurant, hotel and supermarket sales. For example, several small puree operations in Honduras process and export mamey zapote and soursop puree to Miami for the production of ice creams.

Fruit juice bars are becoming more popular in northern countries and are appearing in supermarkets. I did not see any fruit juice bars while I was in Barbados but, then, many restaurants and food service retailers were closed for vacation or maintenance while I was

there. Some of the “organic” and “natural foods” supermarkets in the US and Europe are installing fruit juice bars in their stores to satisfy this growing demand. Tourists who experience new flavors while on vacation in Barbados will “carry” back a desire to have access to those new flavors in their home countries, thus increasing demand abroad for tropical fruit juices.

Frozen fruits and vegetables

Quick or Individually quick frozen (IQF) fruit chunks and tidbits can be sold to manufacturers of dairy products such as ice cream, yogurt and milk-based fruit-flavored drinks. Hon. Consul Faria has discussed the possibility of such a venture with the Pine Hill Dairy but has had no positive response.

Frozen vegetables have a good market in Barbados. The frozen vegetable section is sometimes larger than the fresh f&v section of supermarkets.

Lumber

Supplying woods other than greenheart and purpleheart and value-added wood products for furniture, architectural structures and details, arts and crafts trade has some promise. I contacted Anthony Hoad, an architect in Barbados, to explore interest in the use of some of these others woods for architectural details and he expressed interest in learning more about the properties of the woods and receiving samples. An effort should be made to follow up on this request and to contact other members of the architectural and building constructors organizations to develop interest in use of these relatively little-known woods.

BUILDING SUCCESSFUL BUSINESS RELATIONS WITH CUSTOMERS

To introduce the topic of what is needed to build a successful relationship with intermediaries in Barbados, I will start with the comments of an importer in Barbados of fresh produce who also is a wholesaler, distributor and retailer. This candid interview illustrates the problems that Barbadian buyers have experienced with Guyanese suppliers and serves as an object lesson in how NOT to build a successful relation with customers.

The Case of Sookhram’s Fruit and Vegetable

The following should be old news to Mr. Bowhan Balkaran, Permanent Secretary to the Ministry of Fisheries, Crops and Livestock as he recently visited Sookhram’s Vegetables while in Barbados for a meeting of the Food and Agriculture Organization (FAO).

Sookhram’s Fruit and Vegetable is a small wholesale-retail shop on Suttle Street in Bridgetown that specializes in Guyanese products. Sookhrams is probably one of the largest wholesalers/retailers of Guyanese products in Bridgetown. The owner-operator, Mrs. Sookhram Awad is, herself, a Guyanese immigrant to Barbados. When starting out

in the produce business, Sookhram personally sourced and imported fruits and vegetables from Guyana for about three-years until the pink mealy bug was discovered in Guyana. The Barbadian government halted imports for the years 1997-1999 until a means of containing the pest and a quarantine procedure was mutually agreed upon by the two governments and imports could be resumed. In the interim, Mrs. Sookhram began sourcing her vegetables from Barbadian, Trinidadian and US growers.

After the ban on Guyanese products was lifted, Mrs. Sookhram did not return to sourcing and exporting Guyanese products herself. Her business in Barbados had grown rapidly during the ban and she no longer had the free time available to handle sourcing and importing herself. Instead, she turned to purchasing f&v from Guyanese exporters. However, with the exception of one Guyanese exporter, she prefers to work with the Barbadian and Trinidadian suppliers rather than the Guyanese. Of the several reasons given for this preference, most stem from the time and financial losses that she incurs when working with the Guyanese exporters as compared to the Barbadian or Trinidadian suppliers.

Typically, some of the problems in dealing with Guyanese producers and exporters arise from business practices that are unprofessional, unscrupulous or so careless as to appear to be unscrupulous. These include: short counts, altered invoice quantities and prices and attempts to extract additional payments for the same shipment. Efforts to help an exporter with cash flow problems by providing advances resulted in the exporter using the advance to pre-pay airfreight for product that was sent with her shipment but then sold to other wholesalers, thereby putting her in the position of helping the exporter supply her competitors with her own money.

Other problems with working with Guyanese suppliers were: (1) inconsistent volumes resulting from the inability of the Guyanese exporters to find or finance all of the volumes ordered for every shipment, (2) poor product quality and (3) refusal by exporters to accept discounts for spoilage because 100% of the product does not always arrive in top condition, which results in mutual bad feelings and mistrust. Barbadian product is fresher than Guyanese as it is generally delivered the same day as it is harvested, not two days or more after harvest as for the Guyanese product, and has not experienced the trauma of long distance transport. The result is less spoilage for Barbadian produce than for imported Guyanese produce. Because of this, with Barbadian product there is less trouble and time lost in calculating losses or discounts, fighting with the supplier over the discount and disposing of spoilage than with Guyanese product.

Sookhram noted that okra, in particular, incurs large losses due to spoilage, which is a source of contention, as the exporters do not appreciate the losses incurred because of mishandling and long-distance transportation. Despite its deceptively tough-looking exterior, okra is a highly perishable vegetable, a fact often overlooked by new producers and exporters of this product. Considering the conditions of handling between the harvest and packing, the conditions at the NGMC packing facility (no cold chain, hot and poorly-ventilated facilities) and unreliable transportation (delays at the airport, cancelled flights, etc.), high losses in quality would be expected. When exported by experienced,

professional producers, okra is picked (sometimes twice a day or more to avoid oversized product), pre-cooled and packed as quickly as possible and a strict cold chain is maintained from as soon after harvest as is practical until delivery to the buyer. According to information acquired in Guyana, it would appear that none of the okra, nor any other vegetable or fruit for that matter coming out of Guyana, is being handled in this manner. Additionally, Ms. Awad's shop on Suttle Street is not air-conditioned and on the day of the interview was very warm, which would contribute to some degree to increased spoilage of perishable products. She is aware of this and is working towards air conditioning the shop.

Moreover, when she was forced to seek new suppliers during the import ban, Sookhram discovered that US and Trinidadian exporters are more reliable in sending the volumes requested and on-time; they supply produce that meets her quality specifications; it incurs less spoilage and these other suppliers are more flexible about payment conditions (Guyanese exporters, because of their short cash flows, want cash on delivery).

Sookhram states that she tries to keep Guyanese f&v in her shop when she can as she feels that the quality of the Guyanese f&v is basically superior to that of Barbadian f&v and that her Guyanese clients can tell the difference. Nevertheless, much of her f&v are now Barbadian. As a footnote, she pointed out that a Barbadian grower is now cultivating Indian bitter melon, which was previously only available from Guyana or Trinidad and that this will now create competition for the Guyanese product.

Other importers have reported limited experiences with Guyanese exporters of fresh f&v. Apparently, at one time there were some reliable suppliers of very good quality pineapples but the importers have lost contact with those suppliers and now source pineapples elsewhere.

These comments are typical of the reasons given by importers throughout the islands for no longer sourcing from Guyana, not only for fresh f&v but for other items as well, including furniture, jewelry and precious stones and metals, handicraft items and wood products. It is fair to say that, in general, buyers have developed the impression that Guyanese producers are unreliable, unscrupulous and over-demanding because of their own experiences or the experiences of other buyers in their area. Because of the small size of Barbados and the limited number of players in the market, the word about a bad experience gets around quickly. It must be pointed out here that buyers may stick with a product or supplier despite bad experiences for a long time but if a less troublesome, cheaper or better quality alternative (domestically produced karela, for example) comes along, they will drop the less optimal supplier quickly once they have determined that the new supplier will last.

What are the key tools to developing a good business relationship with your supplier? There are no special secrets. The following are basic rules that would serve to develop and preserve a relationship for any customer in any trade.

- Carefully select buyers with a good reputation for payment within 30 days of delivery and fairness in settling disputes over the product. If the buyer cannot pay you within a time frame that meets your reasonable needs, look for another buyer.
- Do not engage in a transaction when you know you cannot fulfill all of the customer's expectations concerning price, delivery dates, volumes, product quality, etc.
- Draw up a written marketing agreement that details the products, product quality and volume, packaging of product, means of delivery, date or schedule for delivery, price or sales arrangement (commission if not an outright sale), means and time limit for payment, etc. Both the supplier and the buyer should sign it as a sign of good faith and use the agreement as a reminder of the terms of the original agreement. Both parties should have a copy of the signed agreement for his reference. If the buyer won't sign it, look for another buyer.
- Provide on-time delivery of the product, product quality and volume agreed upon.
- Communicate immediately with the buyer in the case that there are unexpected problems that might interfere with an on-time delivery and keep him apprised of progress towards resolution of the problem.
- Quickly follow up by communicating immediately with the buyer after a delivery to determine the condition of the product upon arrival. Discuss problems and solutions.
- Always follow-up on and comply with promises made. Don't make promises that you know that you cannot keep.
- Minimize the number of times that you have to call and make an excuse or an apology for a mistake or problem. In other words, do a good job at anticipating and heading off problems before they arise. Perfection, perfection, perfection.
- When problems arise, attempt a quick, mutually fair and amicable settlement of the issue. If you feel that you have been taken advantage of, implement procedures to avoid the same problem in the future. If that is not possible, look for another buyer.
- Be observant for new opportunities for you and your buyer.

In other words, follow the Golden Rule: "Do unto others as ye would have others do unto you".

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
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Guyana
Tel: 592 226 8255
592 227 1630
592 226 2219
Fax: 592 227 4114

ANNEX I

USEFUL CONTACTS

Representative of the Republic of Guyana

Honorary Consul Norman Faria

Address: 10 Bell Main Rd, Black Rock, Bridgetown, Barbados, WI

Telfax: 246-426-0861

GOVERNMENT REGULATORY AGENCIES

Plant Quarantine Division

Address: Ministry of Agriculture and Rural Development
Crompton St., Bridgetown, WI

Tel: 246-426-1222

Fax: 246-426-6927

Email: plantquarantinebds@caribsurf.com

Veterinary Services

Address: Ministry of Agriculture and Rural Development
The Pine, St. Michael, Barbados, WI

Contact:

Position:

Tel: 246-427-5073

Fax: 246-429-2143

Barbados Agricultural Development and Marketing Corp.

Address: Fairy Valley, Plantation House, Christchurch, Barbados, WI

Contact: Leslie Britton

Tel: 428-0250

Price Control Division

Address: Ministry of Commerce, Consumer Affairs & Business Development
Pelican Industrial Estate, Fontabelle, Barbados, WI

Tel: 246-437-3552/3/8;437-3570-2

Fax: 246-228-3821

Barbados Customs & Excise Department

Address: Barbados Port Authority Building, University Row,
Bridgetown, Barbados, WI

Contact: Comptroller of Customs

Tel: 246-430-2300

Fax: 246-427-7358

Email: asycuda@customs.gov.bd

Barbados National Standards Institution

Address: Flodden, Culloden Road
St. Michael, Barbados, WI

Contact: Ken Mullens

Tel: 246-3870

Fax: 246-436-1495

Email: office@bsni.com.bb

Ministry of Tourism and International Transport

Tel: 246-430-7500

Barbados Investment and Development Corporation (BIDC)

Address: Pelican House, Princess Alice Hwy, Bridgetown, Barbados WI

Tel: 246-427-5350

Fax: 246-426-7802

Barbados Small Business Development Center

Address: Fontabelle, St. Michael, Barbados, WI

Tel: 246-426-2300

Fax: 246-426-4635

Barbados Statistical Service

Address: 3rd Floor, National Insurance Bldg
Fairchild St, Bridgetown, Barbados, WI

Tel: 246-427-7841

Fax: 246-435-2198

ANNEX II

PRICES, RETAIL AND WHOLESALE (TERMINAL MARKETS)

TABLE 2. PRICES IN AUGUST 2002 FOR SELECTED FRUITS AND VEGETABLES AT THE RETAIL LEVEL FOR SEVEN SUPERMARKETS IN BARBADOS (US\$/KG).

Item	Supermarkets Surveyed							Avg.	Min.	Max.
	Complex Julie 'N	Super Centre	JB Super Centre	Worthing Julie 'N	Thorpes	Budg Rite	Christ.* Big B			
Long Beans	-	-	-	-	-	-	5.85	5.85	5.85	5.85
Pumpkin	2.00	2.02	2.02	-	-	2.22	2.02	2.05	2.00	2.22
Potatoes	0.99	-	1.01	-	-	0.69	1.42	1.03	0.69	1.42
Papaya	2.51	-	2.42	2.51	1.94	-	2.41	2.36	1.94	2.51
Watermelon	2.00	-	-	2.00	1.67	-	1.96	1.91	1.67	2.00
Avocado (each)	1.01	3.43	-	-	-	-	1.33	1.92	1.01	3.43
Limes, Key	2.88	3.03	2.92	2.88	-	-	3.02	2.95	2.88	3.03
Pineapple	3.53	4.04	3.03	-	-	-	-	3.53	3.03	4.04
Chayote	3.33	3.43	5.85	-	-	5.33	-	4.49	3.33	5.85
Sw Corn	3.89	6.06	-	3.89	-	7.37	-	5.30	3.89	7.37
Dasheen	1.75	-	-	-	-	-	-	1.75	1.75	1.75
Ginger	4.44	4.87	5.15	-	-	-	11.32	6.45	4.44	11.32
Coconut	0.50	-	0.75	0.65	0.45	-	0.75	0.62	0.45	0.75
Eddoes	-	2.92	-	-	-	-	2.92	2.92	2.92	2.92
Sweet potato	-	3.53	-	3.34	-	-	3.52	3.46	3.34	3.53
Yuca	-	2.02	-	-	-	-	2.01	2.01	2.01	2.02
Butternut	-	2.02	2.02	2.01	-	-	-	2.01	2.01	2.02
Cucumbers	-	1.51	2.02	-	-	3.33	2.22	2.27	1.51	3.33
Mango, local	-	2.47	-	-	-	-	2.47	2.47	2.47	2.47
Eggplant	-	2.02	2.02	-	-	-	-	2.02	2.02	2.02
Yam	-	2.92	2.92	-	-	-	-	2.92	2.92	2.92
Plantain	-	-	2.02	.94	-	-	2.01	1.99	1.94	2.02
Okra	-	-	4.04	-	2.22	3.55	-	3.27	2.22	4.04
Oranges	-	-	0.38	-	-	-	-	0.38	0.38	0.38
Breadfruit	-	-	1.01	-	-	-	-	1.01	1.01	1.01
Onions, red	-	-	-	-	-	-	7.17	7.17	7.17	7.17
Carambola	-	-	-	-	-	-	3.03	3.03	3.03	3.03

TABLE 2. PRICES OF SELECTED FISH PRODUCTS IN RETAILERS AROUND THE BRIDGETOWN-CHRISTCHURCH, BARBADOS AND THE SPEIGHTSTOWN PUBLIC FISH MARKET (WHOLESALE) IN BRIDGETOWN, AUGUST, 2002.

Prices in US\$/kg.

Item	Preparation	Brand	Processor or Wholesaler/ Distributor	Retailer		Speightstown public fish market	% MU retail
				JB Supercentre	Hanschell & Innis		
King fish	fillet, boneless *		Fish of Barbados, Ltd	7.47		6.67	12%
Banga mary	fillets, boneless	Sea Spray	Sundale	5.75			
	fillets, boneless		BEV Industries		5.45		
Butterfish	fillets, boneless		Morgans Fish House	3.93			
Flying fish	fillets, boneless	Mermaid	Fish of Barbados, Ltd	7.02		6.06	16%
Dolphin	fillets, boneless		Morgan's Fish House	9.74			
Red snapper	whole, frozen			8.18		6.67	23%

* product was vacuum-sealed.

TABLE 3. RETAIL PRICES FOR SELECTED SAUCES, SEASONINGS AND PRESERVES FOUND IN SUPERMARKETS IN THE BRIDGETOWN-CHRISTCHURCH AREA OF BARBADOS, AUGUST 2002.

PRICES IN US\$/UNIT.

Items	Supermarket	Brand	Processor/Distributor	Origin	Retail Price	
					US\$/g	US\$/ml
Casareep	Big B	Guyanese Pride Pomeroon Casareep	Bedesee Imports, Toronto	CA*	0.011	
		Cooks Dit Cas	FAM Marketing, Guyana	GY		0.011
	Thorpes	Sari's Casareep	Sari & Ricks	GY		
		Major's Casareep	Major, Guyana	GY		0.004
Green seasoning	Julie 'N	Fordes Homemade Sauce				0.148
		Golden Delight Green Seasoning				0.004
	JB SuperCentre	Golden Delight Green Seasoning				0.004
	SuperCentre	Matouk Green Seasoning		TT		0.007
	J B SuperCentre	Matouk Green Seasoning		TT		0.007
Achar	Thorpes	Major's achar	Major, Guyana	GY		
	J B SuperCentre	Tropical Innovations		CR		0.017
Hot sauce	Thorpes	Majors		GY		0.007
	Julie 'N	Country Boy				0.005
		Delish Bajan Sauce		BB		0.005
Jelly	Julie 'N Complex	R & L	Rose & LaFamme	BB	0.005	
		Matouk		TT	0.004	
		Home	Spring Garden Foods	JM	0.005	
		Mabel	National Canneries	TT	0.005	
		Smuckers		US	0.014	
		Amanda	Clejo's Enterprises	BB		

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. 5: MARKET PROFILE: BARBADOS – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 6: MARKET PROFILE: TRINIDAD – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 7: MARKET PROFILE: ST. LUCIA – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
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- BULLETIN No. 9: MARKET PROFILE: MARTINIQUE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 10: MARKET PROFILE: GUADELOUPE – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 11: MARKET PROFILE: ST. MAARTEN – A RAPID RECONNAISSANCE SURVEY, FEBRUARY 2003.
- BULLETIN No. 12: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN No. 13: THE CARIBBEAN MARKET FOR FISH AND SEAFOOD – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).

- BULLETIN NO. 14: THE CARIBBEAN MARKET FOR FRESH FRUITS AND VEGETABLES – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN NO. 12: THE CARIBBEAN MARKET FOR LUMBER AND WOOD PRODUCTS – A RAPID RECONNAISSANCE SURVEY. (A COMPENDIUM VOLUME DUE THE 2ND QUARTER 2003).
- BULLETIN NO. 11: MARKET PROFILE: NORTHERN BRAZIL – A RAPID RECONNAISSANCE SURVEY (EXPECTED IN JUNE 2003)

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